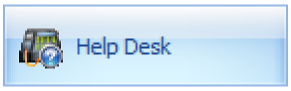
Argonaut SYSTEMS LTD

experts in **Enterprise Management Systems**
for every level of business

BELLEROPHON H.D
CUSTOMER CARE & HELPDESK SYSTEM

Built on

BELLEROPHON 2.0
ENTERPRISE MANAGEMENT SYSTEM



Manual

Created by Matt Ashdown (3/3/09)

Organisations in virtually every industry sector rely on their IT systems to conduct business. The IT department's ability to resolve technology issues and manage the ever-changing IT infrastructure is critical to support business goals. Bellerophon Helpdesk automates many aspects of call management, increasing efficiency which allows staff to focus on problem resolution. The solution is easy to deploy, in days, not weeks - and is affordable for organisations that need a quick start in service management.

BELLEROPHON HD is built on the same **BELLEROPHON EMS II** platform as our more comprehensive enterprise solution, Organisations that have a helpdesk requirement today can be confident of investing in a solution that can grow as business needs change.

BELLEROPHON HD Helpdesk software automates many aspects of call and trouble ticket management, increasing efficiency, and allowing the help desk to focus on support & problem resolution.

In order for today's businesses and organizations to maintain and improve customer service and optimize help desk staffing levels your help desk software must help you create... ***an efficient, cost effective customer focused support environment!***

Whether you currently track support requests on paper or spreadsheet, or have help desk software that is no longer adequate for your current needs, we invite you to take a look at our **Bellerophon HD Help Desk Software** which enables you to provide a cost effective network based solution.

- Fully-automated call management, prioritization, ownership and audit trail.
- Fully-automated email integration with shared mailbox support.
- Resource scheduling and calendaring are standard.
- Knowledge Base for common problems and solutions.
- Full rights management to control the access and use of the solution by technicians and customers.
- Comprehensive reporting environment with graphics and real-time report options.
- Fast and easy to install, configure and deploy.
- Fully-customizable table schema and user interface

Fast to Deploy, Easy to Configure

Bellerophon HD Helpdesk software provides the optimum combination of call management automation, functionality and flexibility, delivering a comprehensive help desk solution that satisfies most Helpdesk requirements right out of the box. Built on Bellerophon (Enterprise Support Platform), BELLEROPHON HD allows the customer to pick and choose the elements of the solution required to meet precise needs.

Unlike other IT support software, **BELLEROPHON HD** is non-prescriptive and can be configured to meet additional business processes not strictly defined within a conventional IT Helpdesk environment, thus providing ultimate flexibility.

Business Benefits

- Streamline and automate your customer service requests.
- Improve customer satisfaction.
- Increase the productivity of your IT support staff.
- Lower the cost of your IT support service.
- Reduce technician training time with a familiar look and feel.
- Easily integrate, out of the box, with many common Network and Desktop management solutions.

Contents

0. This Help Desk manual will give you an understanding of Bellerophon HD. The Help Desk can be divided into three categories, setup, functional and informational. Here is a brief overview of how each section of the Help Desk fits into each of these categories.

Setup

The setup screens are where static information pathways are created in order that other screens can work correctly. These screens allow you to

- Setup unique departments on individual helpdesks, with specific fields and data capture points per department.
- Setup custom fields including, text boxes, picking lists, drop downs
- User access per department, but I.T. departments can access each helpdesk
- Setup and configuration of SLA's based on selected custom fields
- Configuration of departments including job completion targets and additional email footers
- Enable or Disabled departments

An example of these types of screen is Maintenance

Functional

The functional screens are where business process actions are carried out within the module. These screens allow you the

- Jobs can be assigned to an individual and alerts and requests are sent via optional emails
- Jobs can be updated and a full and complete audit trial is tagged to the job. This included information regarding what was done, the time it was carried out and by whom
- Job's can be reassigned back and forth to various people; the audit trail is updated automatically
- The jobs can be filtered by both the standard fields and the custom user defined fields
- Documents can be attached to individual jobs and can be retrieved at any time

An example of these types of screen is Jobs

Informational

Finally, the informational screens are where data can be manipulated and viewed for managerial and analytical purposes. These screens allow

- Statistical information about the success of failure of jobs completed in time.
- Individual users can be monitored and their progress compared to others in a league table
- Graphical charts depicting the percentage of jobs completed on time versus, overdue jobs and overdue jobs completed after the estimated due date has been changed to monitor anomalies.
- Jobs can be plotted in an Outlook style calendar interface for easy viewing of the day, week or months tasks.

Some examples of these types of screen are Scheduler and Management

Unique Points about the Help Desk module are

- The ability to completely customise the helpdesk and setup departmentally specific screens.

- The helpdesk is linked into the system and users can directly log jobs without the need to call up in person

0.1 Installation

0.1.1 Bellerophon HD installation

Run Install.exe as administrator

In Windows Vista	Right click and click 'Run as Administrator'
In Windows XP	Right click and click 'Run as...'
	Select the 'The Following User' radial selection
	Enter the administrator log in details

Accept that you wish to install Framework .net 3 and SQL Server 2005 Express
Select a location to install to using the 'Browse' button
Click the 'Install' button
When it asks if you wish to install the application click on 'Install' again
You should now see the log in screen
Make sure the options are visible
Place a tick next to 'Change Server Name'
Enter MYCOMPUTER\SQLEXPRESS (where MYCOMPUTER is the name of your computer)
Leave the Username and Password blank
Click the 'Login' button
When it asks if you wish to create the database as it doesn't exist click yes
When it returns to the login screen enter both the username and password as 'argonaut' and click 'Login'
You should now be in ok

0.1.2 Bellerophon HD Lite installation

Run Install.exe as administrator

In Windows Vista	Right click and click 'Run as Administrator'
In Windows XP	Right click and click 'Run as...'
	Select the 'The Following User' radial selection
	Enter the administrator log in details

Select a location to install to using the Browse button
Click the 'Install' button
When it asks if you wish to install the application click on 'Install' again
You should now see the log in screen
Make sure the options are visible
Place a tick next to 'Change Server Name'
Enter your SQL server name or the name of your SQL Express instance i.e. (MYCOMPUTER\SQLEXPRESS)
Enter a username and password that has access on your SQL to create a database
Click the 'Login' button
When it asks if you wish to create the database as it doesn't exist click yes
When it returns to the login screen enter both the username and password as 'argonaut' and click 'Login'
You should now be in ok

If you get the error unable to create registry keys or there are no options in the 'Server Name' and 'DB Name' drop down menus follow these steps first

Open the 'Helpdesk Key.reg' file from the downloaded ZIP in notepad
Replace 'Enter your SQL server name here' with your SQL Server name
Replace 'Enter your database name here' with your chosen database name

> If you require multiple databases you need to enter the database names separated by commas (databse1,database2,database3,etc)

Close and save the reg file making sure the file extension is still .reg
Double click on the newly updated 'Helpdesk Key.reg' file to update your registry keys
Try again and it should work fine now

0.2 Bellerophon HD Quick Setup Guide

Although some settings will be populated automatically you will need to configure the following screens for Bellerophon HD to run smoothly

Bellerophon icon -> System Options

- **Staff/Users -** Add Staff members and create user logins - Level 10 users bypass all button protection, a valid email address is needed for emails to be sent correctly
- **Currency Maint** – Add additional currencies
- **Divisions / Customer Type** – Add additional divisions and customer types
- **Sales Outlet** – Add your sales outlet details
- **Company Information** – Add your company information
- **Lookup Maintenance** – The lookup table allows you to add or edit the relevant tables
  - **Customer Credit Codes** – These are the payment types
  - **Customer Age Brackets** – These are the age brackets
  - **Customer Contact Titles** – These are the customer titles
  - **Customer Country Codes** – These are the country codes
  - **Customer Source Master/Details Info** – These are the source details
  - **Customer Status Codes** – These are the customer statuses
  - **Document Store File Types** – These are the document extensions
  - **Email Server Setting** – This is your email server and the email mail address that the help desk emails are sent from – These are required for emails to be sent
  - **Help Desk SLAs** – These are the service level agreements
  - **Staff Department** – These are the departments

User Options -> My Customisation – Customise the look and feel of Bellerophon HD and the default printers

Help Desk -> Customers – Create new customers

Help Desk -> Help Desk -> Maintenance

- **Type Maintenance** – Create new custom fields and sub types
- **Department Maintenance** –
  - Add / Remove users from the department
  - Allow users to edit estimated completion dates
  - Set the Job Completion target
  - Set the Default Job Type
  - Add any Additional Email Footer Text
  - Set the Overdue Job Gauge Maximum Value
- **Enable / Disable Departments** – Enable or disable departments
- **SLA Maintenance** – Setup the service level agreements so the days left will automatically be calculated when logging a job
- **Job Status Maintenance** – Add additional helpdesk status and set others to be included or not

1. Summary

1.1 What this screen is used for

Viewing at a glance the summary of the statistics for the selected departments helpdesk

Changing the summary to view

1.2 Understanding the screen

Summary to view
These radial selections allow you to pick which summary you wish to view
Total Helpdesk Users
This shows the total amount of helpdesk users for the selected department
Total Helpdesk Users Logged In
This shows the total amount of helpdesk users currently logged in for the selected department
Total Jobs
This shows the job total for the selected summary
Total Overdue Jobs
This shows total amount of overdue jobs for the summary selected
Total Open Jobs
This shows the open job total for the selected summary
Percentage of Jobs Completed On Time
This meter shows the total amount of jobs completed on time for the selected summary
Total Completed Jobs
This shows the completed job total for the selected summary
Total Cancelled Jobs
This shows the cancelled job total for the selected summary
Total Jobs Being Monitored
This shows the being monitored job total for the selected summary
Total Jobs Being Actioned
This shows the being actioned job total for the selected summary

1.3 Using the screen

1.3.1 - This screen is for viewing easy to see figures for the selected summary on the selected department’s helpdesk. To change the summary use the radial selections at the top left of the screen, you can choose between All, this month, last month, this year and last year (the figures change automatically to reflect your selection)

1.3.2 - To switch between departments you need to click the “Select Department” button to select a new one from the list

2. Jobs

2.1 What this screen is used for

Creating staff or customer jobs assigned to a specific person with relevant data

Updating existing jobs

Viewing existing job details and job history

Viewing jobs in a easy to view, colour coded, list format (Red – Overdue, Yellow – Due, Green – Not Due)

Exporting all jobs, selected job details or selected rows for database usage

Filtering the list including hiding and showing Cancelled orders

Switching Departments

Adding documents and files to jobs and updating these files with newer versions

2.2 Understanding the screen

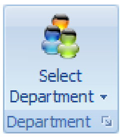
2.2.1 Title Bar – Edit

New
This button allows you to clear the job details below to place a new job
Update
Click this button to update and edit the selected job
Export To File
This button exports the details of the jobs in the list to a text file

2.2.2 Title Bar – Filter

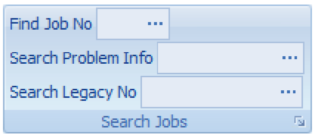
Filter Jobs
Click this button to filter the jobs using the selected information
Reset Filters
Click here to clear any filters entered and return to the default filter
Given To
This allows you to select which person a job was assigned to
Status is (not)
This allows you to select either if a status is or if a status is not the selected status
SLA
This allows you to select which SLA you wish to filter
Request From Staff Member
This allows you to select which staff member logged the job
Request From Customer
This allows you to select which customer logged the job
Show Cancelled
This tick box allows you to show or hide cancelled orders
Date Type
This allows you to select the date type to select
Date From
This allows you to select the date from
Date To
This allows you to select the date to
Custom fields
These fields are custom field's setup for each specific helpdesk

2.2.3 Title Bar – View



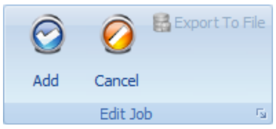
Select Department
This button allows you to select which department you wish to view

2.2.4 Title Bar – Search



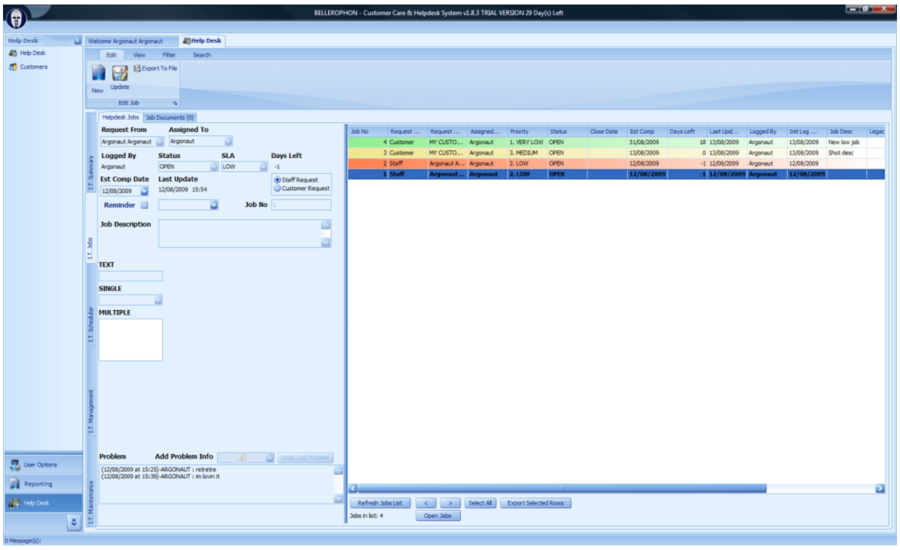
Find Job No
This allows you to search for a specific job number
Search Problem Info
This allows you to enter text to search for in the problem info of all the jobs
Find similar Jobs
This button allows you to find similar jobs to the one selected

2.2.5 Title Bar – When adding or updating a job



Add / Save Changes
This button allows you to add or save the changes made to an existing job
Cancel
This button allows you to cancel any changes made

2.2.6 Help Desk Jobs tab



When a Customer Request

Customer No
This shows the customer number
Customer Name
This shows the customer name

When a Staff Request

Request From
This shows who requested this job

Assigned to
This shows who the job is assigned to
Logged By
This shows who logged the job initially

Status
This shows the current status of the job
SLA
This shows the current SLA for the job
Days Left
This shows the number of days left until the job passes its estimated completion date
Est Comp Date
This shows the estimated completion date for this job
Last Update
This shows the date the last time the job was updated
Staff / Customer Request
These radial selections show which type of job this is (staff or customer)
Reminder
This tick box and date selector allow you to setup a reminder for the selected job
Job No
This shows the job number
Job Description
This job description is listed here
Custom Fields
Any custom field's setup will be displayed here and the relevant data can be stored here
Problem
This shows the problem / job info and any updates that have been made to this job
Add Problem Info
This drop down text entry box allows you to add problem info to the selected job
When Adding or Updating a job

Send Assignment Email After Save
This tick box indicates that an assignment email needs to be sent when any changes are saved / a new job is added
Send Confirmation Email After Save
This tick box indicates that a confirmation email needs to be sent to the staff member or customer who originally requested the job when any changes are saved / a new job is added

Jobs List
This shows a the list of jobs for the filter options selected in the title bar, this can also be filtered using the controls in the column titles
Refresh
This button refreshes the job list in case there have been any changes
<
This button shows the job details for the previous order in the list from the selected order
>
This button shows the job details for the next order in the list from the selected order
Select All
This button selects all the orders in the list above
Export Selected Rows
Click this button to export the highlighted rows, these can then be pasted into another application like excel
Open Jobs
This button shows only the open jobs (open, monitoring and actioned)

2.3 Using the screen

2.3.1 - To view a jobs details you can select it from the jobs list on the right (by default this doesn't show Completed or Cancelled orders), you can browse through the jobs one by one using the "<" and ">" buttons to go back and forward by 1 job each click. To find a specific job you need to select the "Search" tab at the top then enter the job number into the "Find Job No" box and press return. The "Search Problem Info" box allows you to search all jobs for the problem information entered. The "Search Legacy No" is only used when searching on jobs imported from another helpdesk. You can view the "Problem Info" of a job in a new window by double clicking on it

2.3.2 - If you wish to adjust the filter you can do this from the "Filter" tab on the task bar, click on it to view it. By default the only filter that is enabled is the "Status is not Complete". The "Given To", "Status is" and "SLA" can all be changed to their opposite by clicking on them (click on "SLA" changes it to "SLA is not" etc, click on it again to change it back). You can select the filter options using the drop down lists, once you have select all these click the "Filter Jobs" button to action the filter (the results are shown in the jobs list below). The "Reset Filters" button clears all the filters so all jobs (except cancelled) are shown in the jobs list below, to show cancelled orders you need to place a tick next to "Show Cancelled" then click the "Filter Jobs" button again

2.3.3 - To switch between departments you need to click into the "View" tab on the taskbar then click the "Select Department" button to select from the list

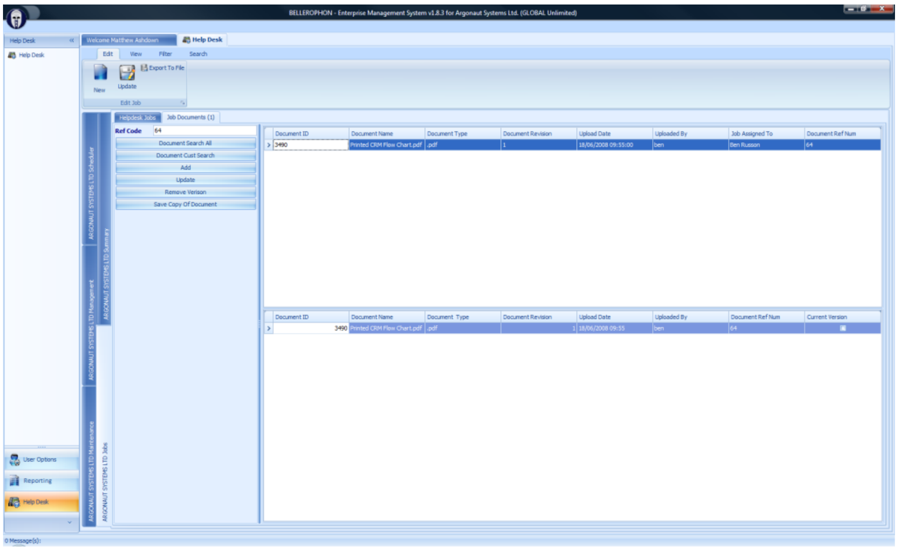
2.3.4 - To create a new job you need to click the “New” button in the “Edit” tab on the taskbar, once you have done this the “Add” and “Cancel” buttons will appear on the taskbar. You need to enter all the information below and populate all required fields (fields that need to be entered for a job to be logged). Once you have populated all the necessary fields the “Est Comp Date” and the “Days Left” are calculated automatically using the SLAs entered. You then need to enter all the job information into the “Add Problem Info” section and click OK. The “Send Assignment Email After Save” and “Send Confirmation Email After Save” are both ticked automatically, these can be unticked if you don’t want these emails to be sent. Once you have finished entering the details click the “Add” button in the taskbar to save the changes, send the automatic emails, assign a job number and add it to the jobs list on the right. If you wish to close the job without saving it click the “Cancel” button on the taskbar and all changes will be discarded

2.3.5 - If you wish to update an existing job you need to select it from the list so the details of the job are populated on the left then click the “Update” button in the “Edit” tab on the taskbar, once you have done this the “Save Changes” and “Cancel” buttons will appear on the taskbar. Once you have made any changes or added any additional problem information you need to click the “Save Changes” button to save any changes, to discard any changes click the “Cancel” button

2.3.6 - There are a 2 main ways of exporting data from the help desk

- The first is using the “Export to File” button in the “Edit” tab on the taskbar, when you click this you are prompted for a name and location to save the file. This exports all the jobs including the problem information to a text document
- The second is the “Export Selected Rows” button underneath the jobs list, you need to highlight the rows in the jobs list or click the “Select All” button to highlight them all then click the button to export the job details to the clipboard (all apart from the problem information) you can then paste these into another problem such as excel for reporting purposes

2.4 Job Documents tab



Ref Code
This shows the entered ref code
Document Search All
This button allows you to search all documents attached to any job using the entered “Ref Code”
Document Job Search
This button allows you to search only documents attached to this job using the entered “Ref Code”
Add
Click this button to add a new document to the selected job using the ‘Ref Code’ entered
Update
Click this button to update the selected document with a new version
Remove Version
Select a version from the list on the right and click this button to remove it
Save Copy Of Document
This allows you to save a copy of the selected document version to view and edit
Document List

This shows the list of documents attached to the selected job by default (or the results from a search)
Version List
This shows the different versions of the selected document above

2.5 Using the screen

2.5.1 - The document display section automatically shows the documents attached to the selected order by default, you can search these documents by typing something in the "Ref Code" box then clicking the "Document Cust Search" button. If you wish to search all customer documents click the "Document Search All" button instead

2.5.2 - To view the different versions of a document click on it and the versions of that document will be displayed below. To open and save one of these versions to your computer you need to highlight it from the document versions section then click the "Save Copy Of Document" button, this will then open a new window allowing you to select where you wish to save the document and what you want to call it

2.5.3 - If you wish to add a new document to this order you need to enter the new name in the "Ref Code" field then click the "Add" button, this then opens a window to select a document to upload. Once you have uploaded this it will appear in the document display section

2.5.4 - If you wish to update a document with a new version, you need to select the document from the list then click the "Update" button, this opens up a new window allowing you to select a later version of the selected document (this needs to have the same name as the original file)

2.5.5 - To remove a version of a document you need to select the document, then select the version of the document you wish to remove then click the "Remove Version" button

3. Scheduler

3.1 What this screen is used for

Viewing jobs in a list and an outlook express style calendar view

Filtering jobs

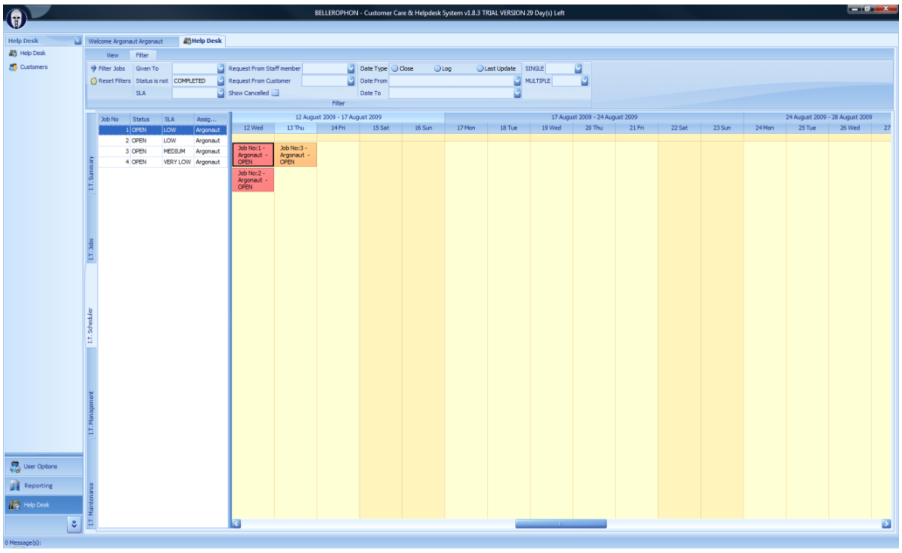
Opening and viewing jobs in separate windows

Opening jobs to amend them using the job viewing window

Viewing the schedule in various views (week, month or timeline)

Viewing a job in the calendar view using the list on the left

3.2 Understanding the screen



In the View tab

Go To Date
This date selector allows you to select a date to jump to on the calendar view

Scheduler View
This allows you to select the time scale shown on the calendar view

Selected Department
This button allows you to select a different department to view

In the Filter tab

Filter Jobs
Click this button to filter the jobs using the selected information

Reset Filters
Click here to clear any filters entered and return to the default filter

Given To
This allows you to select which person a job was assigned to

Status is (not)
This allows you to select either if a status is or if a status is not the selected status

SLA
This allows you to select which SLA you wish to filter

Request From Staff Member
This allows you to select which staff member logged the job

Request From Customer
This allows you to select which customer logged the job

Show Cancelled
This tick box allows you to show or hide cancelled orders

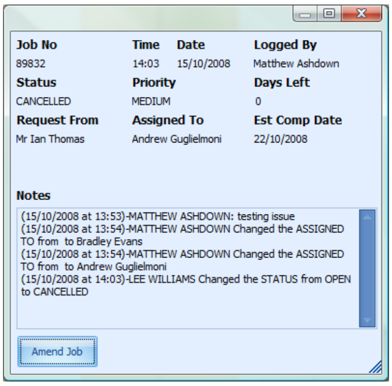
Updated Date From
This allows you to select the update date from

Updated Date To
This allows you to select the update date to

Custom fields
These fields are custom field’s setup for each specific helpdesk

Jobs list
This shows the list of the jobs for the criteria selected above
Calendar View
This shows the same list but in an outlook style calendar view

3.2.1 Job viewer



Details
These show the details of the job being viewed
Notes
This shows the notes for the selected job
Amend Job
This button allows you to open the current job in the Jobs tab

3.3 Using the screen

3.3.1 - This screen shows the jobs using the filters above in a list and outlook style calendar view, if you wish to jump straight to a job on the calendar view you need to double click on it from the list. To go to a date you just need to go into the "View" tab on the task bar then select the required date from the "Go To Date" selection at the top

3.3.2 - The scheduler view can be switched between week, month and timeline using the drop down selection "Scheduler View" in the "View" tab

3.3.3 - To switch between departments you need to click into the "View" tab on the taskbar then click the "Select Department" button to select from the list

3.3.4 - You can filter the jobs in the list and scheduler view using the filters in the "Filter" tab, you need to select the required options using the drop down lists then click the "Filter Jobs" button. The list and scheduler view should then show the results for the selected options. Click the "Reset Filters" button to clear any filter options selected and to show all not completed jobs (apart from cancelled jobs, you need to place a tick next to "Show Cancelled" to show these)

3.3.5 - To view a jobs details you need to double click on it in the scheduler view and it will open in a new job viewer window. This new window will contain all the job details and the job notes. The "Amend Job" button opens the selected job in the "Jobs" tab and sets it so it can be amended

4. Management

4.1 What this screen is used for

Viewing performance statistics for single users or whole departments in a grid and chart view

Adjusting the chart view

Viewing different months, stepping through them 1 by 1 or viewing statistics between certain dates

Printing off reports

4.2 Understanding the screen

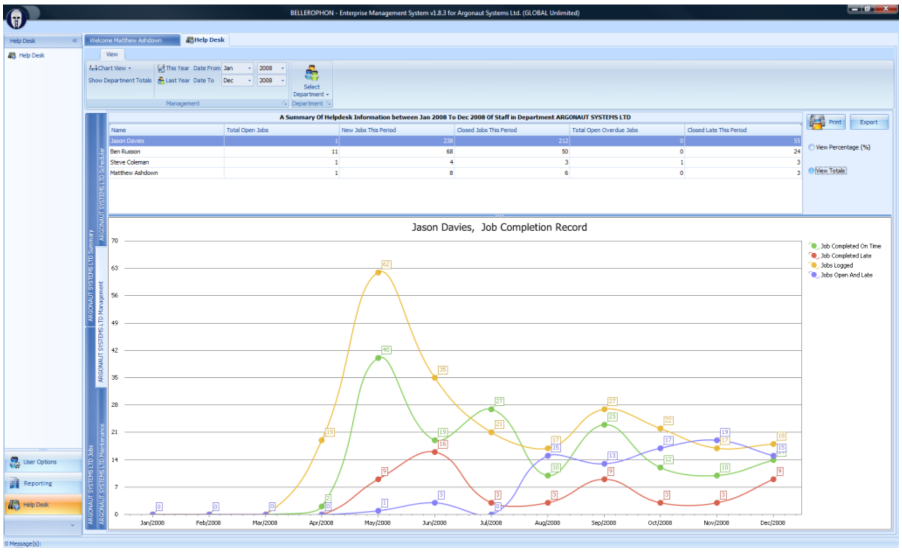


Chart View
Click this to select the chart view
Show Department Totals
Select this option to view department totals for the selected date range
This Year
Click this button to view this year's stats
Last Year
Click this button to view last year's stats
Date From
This shows the month to display stats from
Date To
This shows the month to display stats to
Selected Department
This button allows you to select a new department to view
Print
This allows you to print off the statistics for the users in the selected department
Export
This allows you to export the selected rows below to the clipboard
View Percentages
This radial selection allows you to view the chart in percentages
View Totals
This radial selection allows you to view the chart as totals
When showing department totals
Month by Month stats list
This shows the list of stats for the department by month
When not showing department totals
Department users list
This shows the list of users in the selected department and their individual stats
Chart view
This shows the chart view for the selected user / users / department for the selected time frame

4.3 Using the screen

4.3.1 - This screen by default shows the statistics for the users within the selected department, the highlighted user's statistics are displayed in number and chart views. Select another user to view their statistics. You can select more than one user to group their statistics together by holding down the "Shift" or "Ctrl" keys on the keyboard and clicking on other users. Click "Show Department Totals" if you wish to view the department statistics as oppose to individual / grouped ones, click it again to return back to the individual statistics

4.3.2 - The "Chart View" selection in the taskbar allows you to change the chart view. The "This Year" button allows you to view the statistics for this whole year up until this point and the "Last Year" button shows last year's statistics. If you wish to view statistics between certain months you can enter these in the "Date From" and "Date To" fields. You can change the chart view from percentages to totals using the radial selections to the right of the statistics

4.3.3 - To switch between departments you need to click the "Select Department" button then select a new one from the list

4.3.4 - The "Print" button allows you to print off the statistics for the selected user / users / department being displayed to you default printer

4.3.5 - The "Export Selected Rows" button allows you export the selected row within the users to the clipboard. They can then be pasted in another application such as Microsoft Excel

5. Maintenance

5.1 What these screens are used for

Adding and removing custom main and sub types

Renaming custom main and sub types

Reordering custom main types up and down the list

Adding and removing selected users for the current department

Setting selected users with the ability to change the estimated completion date on a job

Setting up department details such as Job completion targets, default job types, additional email footer text and max levels on the overdue job gauge

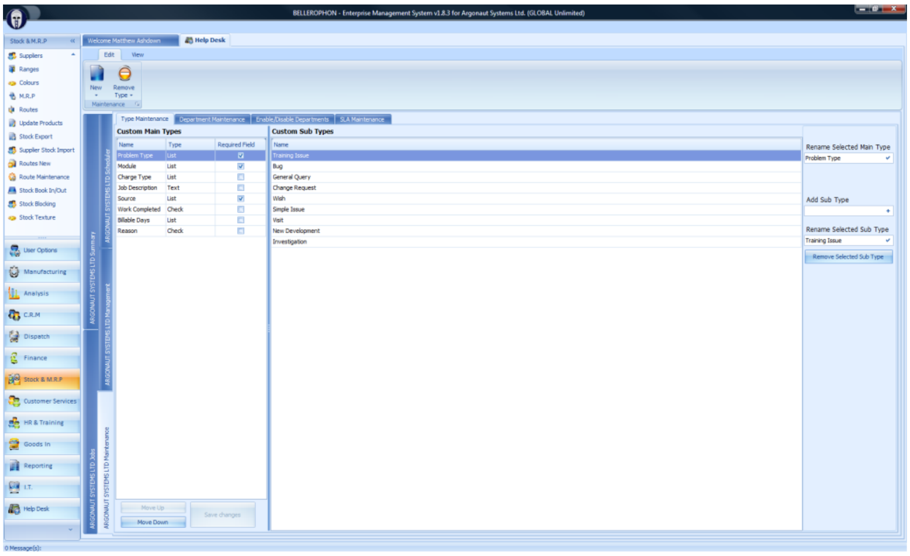
Enabling or Disabling departments

Setting up multiple SLA's for selected custom list types and selecting the default one to use

5.2 Understanding the screen

New Type
This button allows you to create new custom main types
Remove Type
This allows you to remove a selected custom main type
Selected Department
This button allows you to select a new department to view

5.2.1 Type Maintenance tab



Custom Main Types
This list shows the main list types setup and if they are a required field
Move Up
This allows you to move the selected custom type up the list, this also changes where the field appears on the Jobs tab
Move Down
This allows you to move the selected custom type down the list, this also changes where the field appears on the Jobs tab
Save Changes
This allows you to save any changes made to the custom main types
Custom Sub Types
This list shows the custom sub types for the selected customer main type
Rename Selected Main Type
This allows you to rename the selected main type
Add Sub Type

This allows you to add an entered sub type
Rename Selected Sub Type
This allows you to rename the selected sub type
Remove Selected Sub Type
Click this button to remove the selected sub type

5.2.2 Using the screen

5.2.2.1 - To create a new main type you need to click the 'New Type' button in the "Edit" tab, this opens a new window asking you to enter name and select the format. Once you have done this click "Add" to add it to the list below. If you don't wish to add one just click off the window and continue as normal

5.2.2.2 - To remove a main type click the "Remove Type" button in the "Edit" tab, this opens a new window asking you to select which main type you wish to remove. Once you have selected one click the "Remove" button to remove it from the list. If you don't wish to remove one just click off the window and continue as normal

5.2.2.3 - To switch between departments you need to click into the "View" tab on the taskbar then click the "Select Department" to select from the list

5.2.2.4 - The custom main types list shows the main types currently setup and also what type of field it is. There is a "Required Field" tick box next to each one which allows you to specify whether this field needs to be populated for a job to be closed. To change this either place or remove the tick / ticks then click the "Save Changes" button below

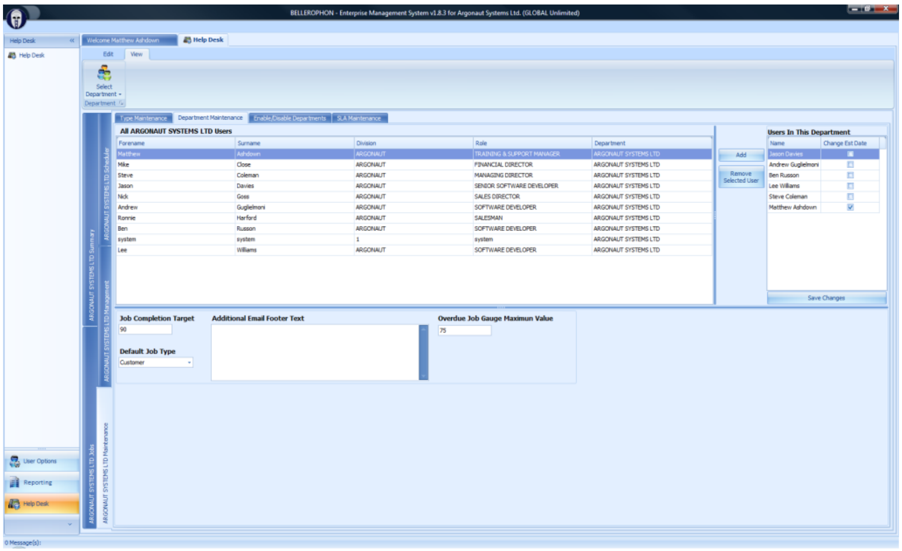
5.2.2.5 - If you wish to change the order of the custom main types on the jobs screen you can do this by moving the fields up and down the list using the "Move Up" and ''Move Down" buttons (depending on where you want the fields to be displayed in the "Jobs" tab) once you have finished making changes you need to click the "Save Changes" button

5.2.2.6 - You can create sub types for list and check custom types, if you wish to do this you need to select the appropriate main type from the list then enter the sub type name in the "Add Sub Type" text entry box and click the plus symbol to add it to the list. Repeat the process until all the sub types have been added

5.2.2.7 - You can rename a main type by selecting the appropriate type from the list then enter a new name in the "Rename Selected Main Type" box and click the tick. You can do the same with the sub types but use the "Rename Selected Sub Type" text entry box instead

5.2.2.8 - To remove a sub type you need to select it from the list then click the "Remove Selected Sub Type" button

5.2.3 Department Maintenance tab



All Users

This list shows all the users setup in the system

Add

This allows you to add the selected user to the selected department

Remove Selected User

This allows you to remove the selected user from the selected department

Users In This Department

This shows the users currently added to the selected department

Save Changes

This button allows you to save any changes made to ‘Users in this Department’

Job Completion Target

This shows the job completion target for the selected department

Default Job Type

This allows you to select which job type is default for the selected department

Additional Email Footer Text

This section allows you to enter any additional email footer text for the selected department

Overdue Job Gauge Maximum Value

This allows you to select the overdue job gauge maximum value which is displayed in the “Summary” tab for this department

Only when changes have been made

Apply

This allows you to save any changes made to the “Job Completion Target”, “Default Job Type”, “Additional Email Footer Text” and “Overdue Job Gauge Maximum Value”

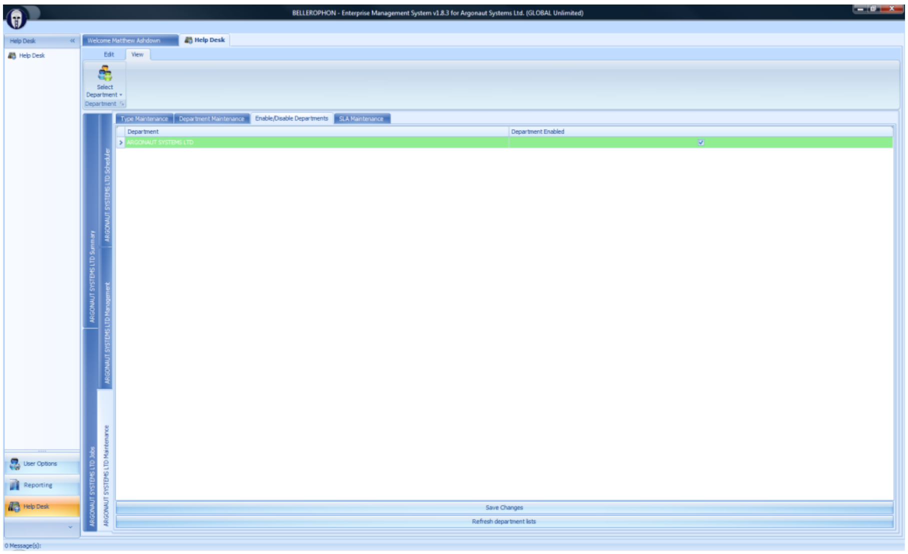
5.2.4 Using the screen

5.2.4.1 - The “All Users” list shows all the active users in the system and the “Users In This Department” list shows the users which are currently in the selected department. If you wish to add someone to the department you are currently in select them from the “All Users” list then click the “Add” button (the user will then show in the department list). To remove a user from the selected department select them from the “Users In This Department” list then click the “Remove Selected User” button

5.2.4.2 - The tick boxes next to each user in the “User in this Department” list allows you to specify if the user can edit the estimated completion date when editing a job, once you have made any changes click the “Save Changes” button

5.2.4.3 - In the section below the “All Users” list you to alter the “Job Completion Target”, “Default Job Type”, “Additional Email Footer Text” and the “Overdue Job Gauge Maximum Value”, once you have made the changes you need to click the “Apply” button to save them

5.2.5 Enable / Disable Departments tab



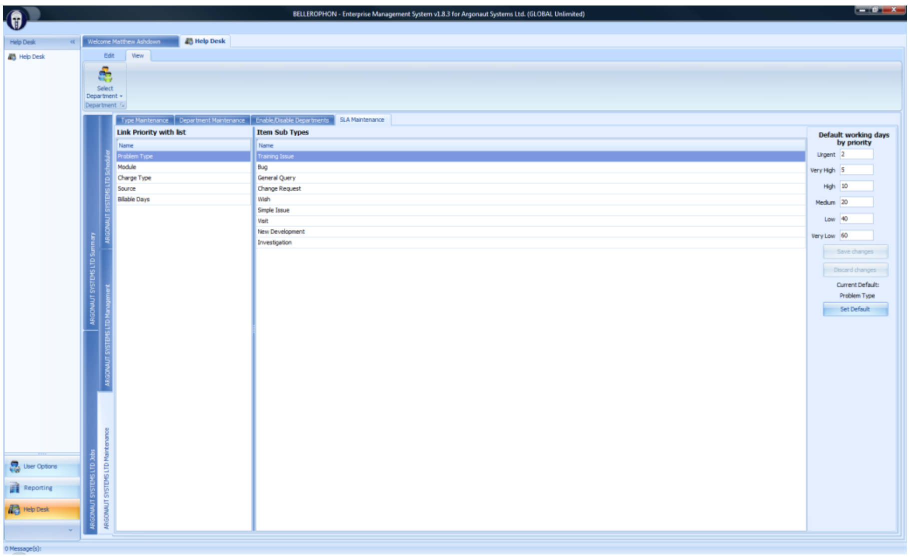
Department List
This shows the list of departments and it shows if the department is enabled
Refresh department Lists
This button allows you to refresh the department list

5.2.6 Using the screen

5.2.6.1 - This tab allows you to enable and disable departments. The list shows all the departments currently setup in the system, the enabled departments have a tick next to them and are highlighted in green. If you wish to enable a department you need to place a tick next to it in the "Department Enabled" column. To disable a department remove the tick next to it (it will then not be highlighted in green). You will always need to have at least 1 department enabled. Click the "Save Changes" button to save any changes made

5.2.6.2 - You can use the "Refresh department Lists" button in case you want to refresh the list to see if there have been any changes made to the departments

5.2.7 SLA Maintenance tab



Link Priority with list
This shows the list of custom list fields
Item Sub Types
This shows the sub types for the selected custom list
Default working days by priority
This allows you to enter the SLA's for the selected sub type
Save changes

This button allows you to save the changes to the SLA's for a sub type

Discard changes

Click this button to discard any changes made

Current Default

This shows the current default SLA's to use

Set Default

This button allows you to set the selected custom list field as the default SLA's to use

5.2.8 Using the screen

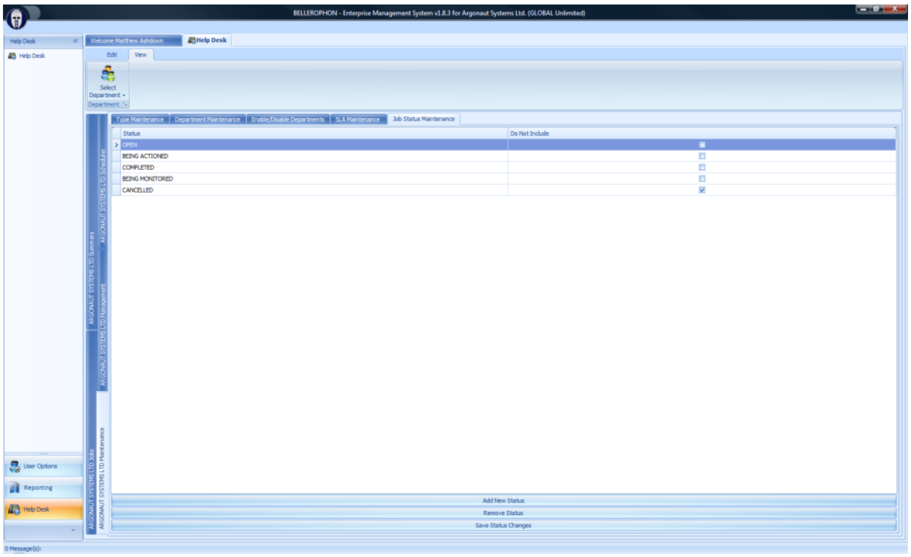
5.2.8.1 - This tab shows the list of custom list fields setup in the "Type Maintenance" tab (check and text custom fields are not shown). The "Item Sub Type" list shows the sub types setup within the selected main type. You can view the SLA's (Service Level Agreements) setup for a selected sub type within a selected main type by selecting it from the list

5.2.8.2 - If there are no SLA's setup select the appropriate main and sub type then enter the figures into the "Default working days by priority" fields and click the "Save Changes" button. Click the "Discard changes" button to discard any changes made to the SLA's

5.2.8.3 - If there are already SLA's setup you can alter these by selecting the appropriate main and sub type then change the "Default working days by priority" figures as necessary and click the "Save Changes" button. Click the "Discard changes" button to discard any changes made to the SLA's

5.2.8.4 - The currently selected default SLA's to use are shown under the Save and Discard buttons. You can change this by selecting another main list type and clicking the "Set Default" button on the right. This will then use the new SLA's to automatically calculate the number of days left when creating a new job

5.2.9 Job Status Maintenance tab



Job status list

This shows the list of job status and shows if they are included or not

Add New Status

This button allows you to add the new status

Remove Status

This button allows you to remove the selected status

Save Status Changes

This button allows you to save any changes made

5.2.10 Using the screen

5.2.10.1 – To add a new status click the 'Add New Status' button to add a new blank line into the list above. Enter the name in this new line then click the 'Save Status Changes' button to save the new status. To remove a status select it from the list then click the 'Remove Status' button

5.2.10.2 – The status in the list have a tick box next to each one which allows you to specify if these status are included in the job grid in the 'Jobs' tab. If you change any of these ticks you will need to click the 'Save Status Changes' button to save the changes

6. Customers -> Customer Details

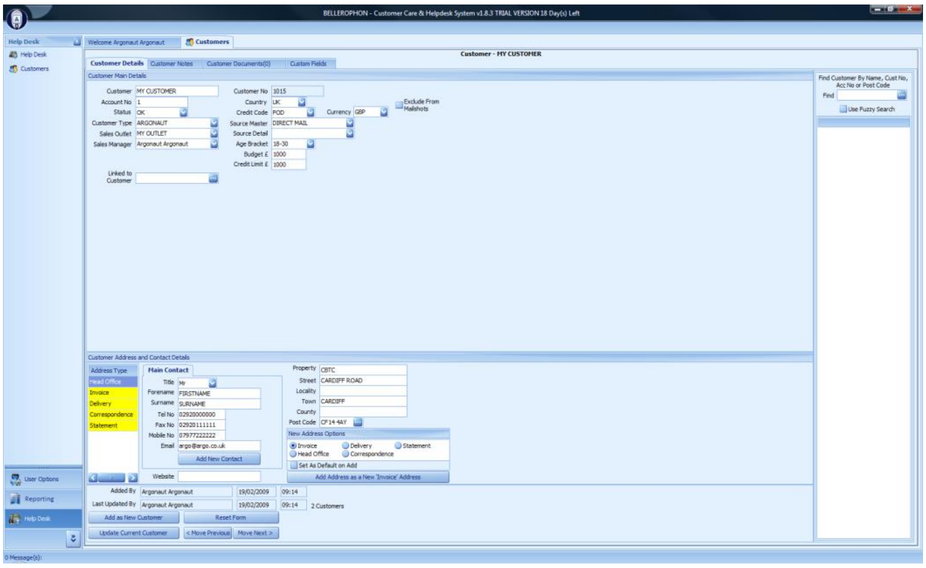
6.1 What this screen is used for

Searching and viewing existing customer details including invoice, head office and any delivery addresses

Adding new customer details

Adding new addresses to an existing customer and changing default addresses

6.2 Understanding the screen



Customer Main Details

This section contains the main customer details

Customer

This shows the customer name

Account No

This shows the account number for the customer

Status

Shows the current status of the customer

Customer Type

Shows which type of customer this is

Sales Outlet

The customer sales outlet

Sales Manager

The sales manager for this customer

Linked to Customer

This shows if this customer is linked to another customer

Customer No

Shows the customer number

Country

Shows the country code

Credit Code

Any credit code is listed here

Source Master

This shows the master source

Source Detail

This shows the source detail

Age Bracket

Shows which age bracket the customer falls into

Budget

Shows the budget for the customer

Credit Limit
The credit limit is listed here
UnInvoiced
Shows the total for anything that wasn't invoiced
Currency
Shows the default currency for this customer
Exclude From Mailshots
This tickbox indicates if this customer should be excluded from mailshots or not
Custom Fields
Any fields below are the custom field's setup in the Custom Fields tab
Customer Address and Contact Details
This section contains the address details for the selected customer
Address Type
This shows the list of addresses setup for this customer, the default address is highlighted in yellow
Title
This shows the customer's title
Forename
The forename for the customer at the address
Surname
The surname for the customer at the address
Tel No
The telephone number
Fax No
The fax number
Mobile No
The mobile number if applicable
Email
The contact email address
Add New Contact
This button allows you to add the contact entered above as a new contact
Property
This shows the property name
Street
Shows the first line of the address
Locality
The location of the address
Town
The town address
County
The county
Postcode
The address postcode
Website
The website address if applicable
New Address Options
When creating a new address for the customer you can select which address you want it to be by using the radial selections listed here
Set As Default on Add
This tick box allows you to let the system know that the next address you add will be the default address
Add Address as a New 'Invoice' Address
This button allows you to add the new address as the new invoice address
Customer information and overall buttons
Added By
This shows who added this customer and the date and time they did this
Last Updated By
This shows who the last person was to update this customer and the date and time they did this
Add as New Customer
This button allows you to add the above information as a new customer
Reset Form
This button allows you to clear the above information to start off again from scratch
Update Current Customer
This button allows you to save any change made to the customer details above
Move Previous
This button moves you back to the previous customer in the system
Move Next
This button moves you forward to the previous customer in the system
Customers
This shows the total amount of customers in the system
Search Section
This section allows you to search the existing customers and assign tasks to them
Find

This free text box allows you to enter information to search on

Use Fuzzy Search

This tick box allows you to enable fuzzy searching when searching customers

Search Results

This shows the search results for the entered search criteria

6.3 Using the screen

6.3.1 **-** This screen allows you to view the details of a customer plus all the addresses linked to this customer. You can view each address individually by selecting it from the “Address Type” list. Default addresses are highlighted in yellow, you can alter these by selecting another one from the list and clicking the “Set this Address as Default”. Safe Addresses are in bold, can you set any address to safe or unsafe by selecting the address then clicking the “Set / Unset this Address as a Safe Address” button

6.3.2 - To search for a new customer you use the search box on the right, type in what you wish to search for in the “Find” box then click the “...” button or press the return key. The search results will be displayed below, click on one to view the customer details. If your search does not get any results you can turn on “Fuzzy Search” using the tick box to enable inexact searching (This is helpful when you’re not exactly sure what the details are for the customer you’re searching for). You can also flick through the customer records by using the “Move Previous” and “Move Next” buttons

6.3.3 - If you wish to save any changes made to an existing customer you need to click the “Update Current Customer” button after making the changes. To create a new customer you need to either alter the details of an existing customer or click the “Reset Form” button to start from scratch, once you have finished making changes click the “Add as New Customer” button to create the customer record (note that the contact information entered at the bottom will be copied to all 5 of the address types by default when the new customer is created)

7. Customers -> Customer Notes

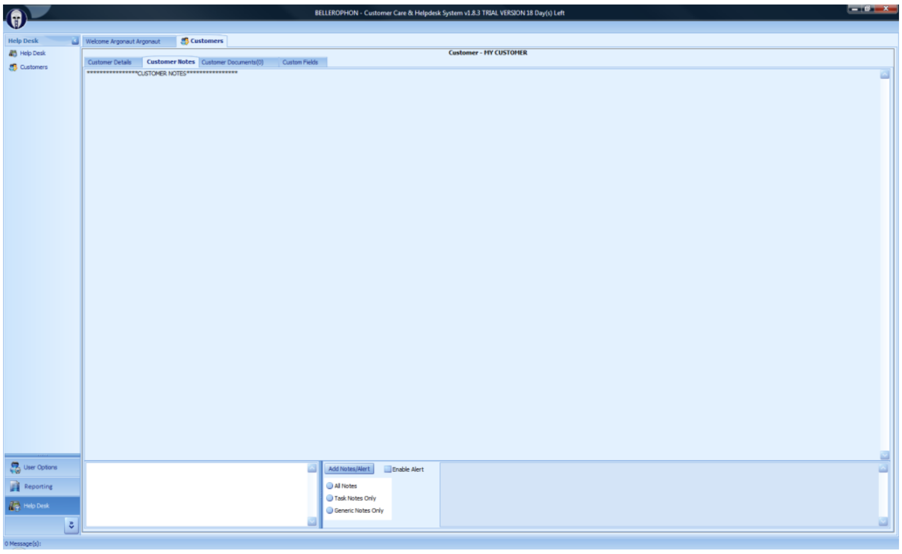
7.1 What this screen is used for

Viewing all the task and customer notes for the selected customer, you can limit the notes being displayed using the radial selections at the bottom

Adding new notes to the customer record

Enabling a customer alert and entering that alert

7.2 Understanding the screen



Notes

This section shows the notes selected

Add Notes / Alert

This button adds the notes entered on the left

All Notes

This allows you to select all notes to be viewed

Task Notes Only

This allows you to show task notes only

Generic Notes Only

This allows you to show generic notes only

Enable Alert

This tick box allows you set the entered alert as a pop up

7.3 Using the screen

7.3.1 - You can view the notes for this customer in this tab, you can alter which notes are being viewed by using the radial selections (all notes, task notes or general notes)

7.3.2 - To add new notes you need to enter the text into the free text box then click the “Add Notes / Alert” button, this will then add the notes to the customer notes above

7.3.3 - If you wish to enable a pop-up alert for this customer when you open the record you need to place a tick in the “Enable Alert” tick box then type the alert in the new free text box to the right that you wish to appear

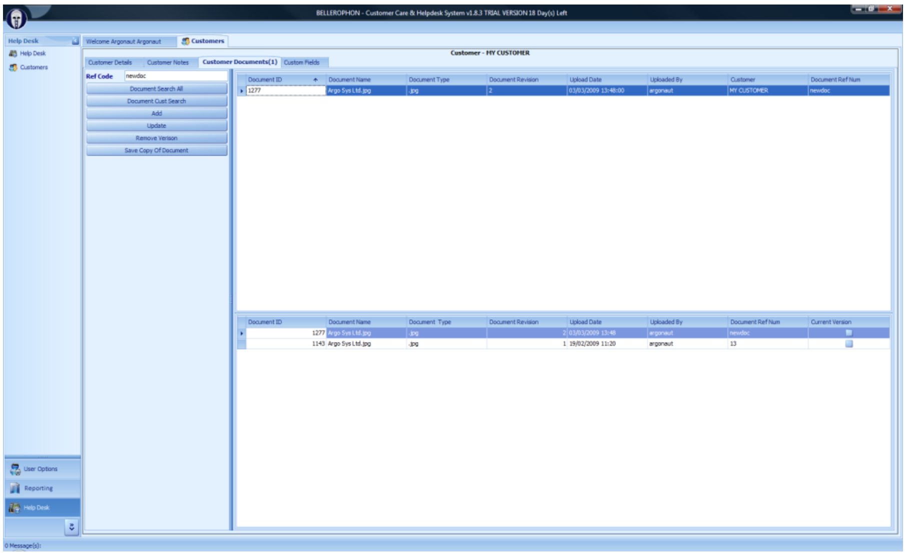
8. Customers -> Customer Documents

8.1 What this screen is used for

Adding, removing, updating and viewing documents attached to this customer. You can also download a copy of any documents saved in the system

Adding new versions of existing files

8.2 Understanding the screen



Ref Code

This is where you type what you want to search for

Document Search All

This button allows you to search all the documents (not just for the customer) for the code entered

Document Cust Search

This button allows you to search the selected customer documents using the code entered

Add

This allows you to add a new document to this customer

Update

This button allows you to update the document selected

Remove Version

This allows you to remove the selected version

Save Copy Of Document

This allows you to save a copy of the selected document onto the computer

Document display section

This section shows by default the documents attached to the selected customer, it also shows search results

Document version section

This section shows the available versions of the document selected

8.3 Using the screen

8.3.1 - The document display section automatically shows the documents attached to the selected customer by default, you can search these documents by typing something in the “Ref Code” box then clicking the “Document Cust Search” button. If you wish to search all customer documents click the “Document Search All” button instead

8.3.2 - To view the different versions of a document select it and the versions of that document will be displayed below. To open and save one of these versions to your computer you need to highlight it from the document version section then click the ‘Save Copy Of Document’ button, this will then open a new window allowing you to select where you wish to save the document and what you want to call it

8.3.3 - If you wish to add a new document to this customer you need to enter the new name in the “Ref Code” field then click the “Add” button, this then opens a window to select a document to upload. Once you have uploaded this it will appear in the document display section

8.3.4 - If you wish to update a document with a new version, you need to select the document from the list then click the “Update” button, this opens up a new window allowing you to select a later version of the selected document (this needs to have the same name as the original file)

8.3.5 - To remove a version of a document you need to select the document, select the version of the document you wish to remove then click the “Remove Version” button

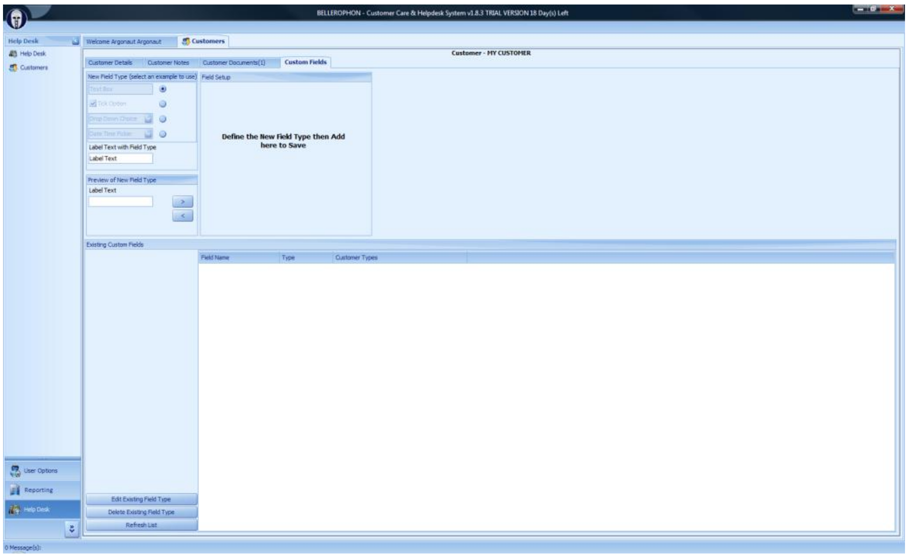
9. Customers -> Custom Fields

9.1 What this screen is used for

Creating custom fields and assigning them to certain customer types

Updating and remove existing custom fields

9.2 Understanding the screen



New Field Type

This section allows you to select what type of custom field to add

New Field Type selection

This section allows you to select what type of custom field to add (Textbox, Tickbox, Multiple choice or date / time)

Label Text with Field Type

This allows you to type the name of the new custom field

Preview

This section contains a preview of the custom field selected above

>

Moves onto the field setup section

<

Moves back to the field type section

Field setup

This section allows you to setup the custom field

Preview

The first box shows the preview again

Add Choices to the Drop Down *(only when creating a multiple choice custom field)*

This allows you to enter choices to add to the list

Assign Customer Types to Field

This pull down list allows you to select which customer types to add

>

Adds the selected customer type to the list

<

Removes the selected customer type from the list

>>

Adds all the customer types from the list

<<

Removes all the customer types from the list

Save New Field Type

Click this button to save the field type being created

Cancel

Cancel any changes made to the new custom field

Existing Custom Fields

This section shows the existing custom fields and the buttons to edit and remove them

Existing fields list

This list shows all the custom field currently setup

Edit Existing Field Type

This allows you to edit the selected custom field

Delete Existing Field Type

This button allows you to remove the selected field type

Refresh List

This button allows you to refresh the list in case there have been any changes

9.3 Using the screen

9.3.1 - To create a new custom field you first need to select a new field type from the selection box at the top left (text, tick, multiple choice or date / time) then enter a name for your custom field in the “Label Text with Field Type” box. The preview section below shows a preview of your selected custom field, to continue click the “>” button and the “Field Setup” section becomes active, to return back to the “New Field Type” section click the “<” button. The Field Section allows you to see a preview of the custom field again and an option to add customer types for this field, select a customer type from the drop down list then click the “>” button to add it. To remove a customer type select it and click the “<” button. The “<<” button removes all the customer types to start from blank again. With the multiple choice custom field you will all have another selection where you can add the selections that will appear in the drop down list once complete (the button configuration is the same as the customer types one). To save the entered custom field as a new field click the “Save New Field Type” button and it will appear in the list below. Click “Cancel” if you wish to cancel any changes

9.3.2 - To edit an existing field you need to select it from the list then click the “Edit New Field Type” button, the field details will then be displayed in the “Field Setup” tab. Once you have made all the necessary alterations click the “Update New Field Type” button to save the changes or cancel if you don’t wish to save any changes made

9.3.3 - To delete a custom field, select it from the list and click on the “Delete New Field Type” button (note: you will not be able to remove a custom field with data attached to it)

9.3.4 - The refresh list button refreshes the list in case there have been any changes

10. Staff/Users

10.1 What this screen is used for

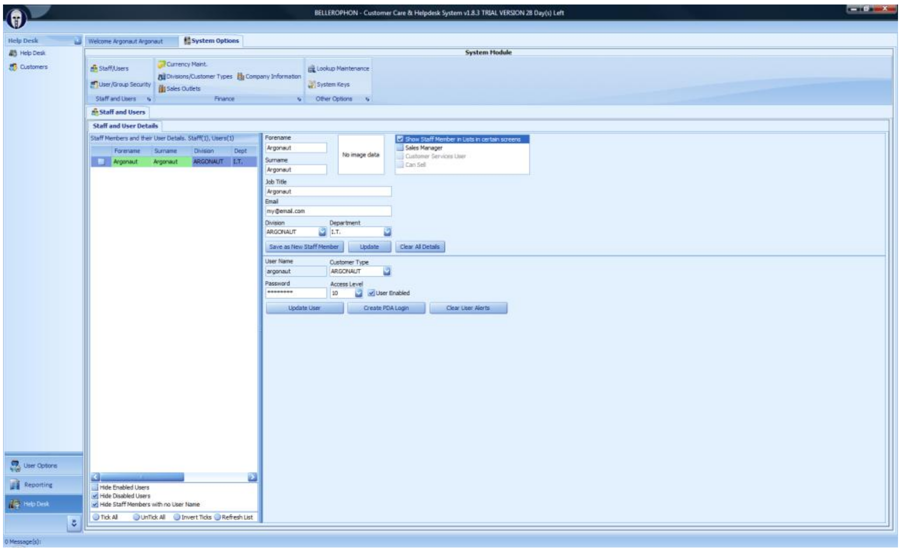
Viewing, creating and editing staff details

Adding and amending user details for staff members

Setting staff members with the ability to sell to selected outlets

Enabling and disabling users

10.2 Understanding the screen



Staff Members / Users Total

This shows the total number of staff members and users in the list

Staff Members list

This shows the list of staff members and users (disabled staff members show in red)

Hide Enabled Users

This tick box allows you to hide enabled users

Hide Disabled Users

This tick box allows you to hide disable users

Hide Staff Members with no User Name

This tick box allows you to hide staff members with no user name

Tick All

This allows you to tick all the staff members in the list

UnTick All

This allows you to untick all the staff members in the list

Invert Ticks

This allows you to invert the ticks selected above

Refresh List

This allows you to refresh the list in case there has been any changes

Forename

This shows the first name for the selected staff member

Surname

This shows the surname for the selected staff member

Job Title

This shows the job title for the selected staff member

Email

This shows the email address for the selected staff member

Division

This shows the selected division for the selected staff member

Department

This shows the selected department for the selected staff member
Image
This shows the image of the staff member if one has been uploaded
Show Staff Member in List in certain Screens
This tick box allows you to show staff members in certain screens
Sales Manager
This tick box allows you to enable the selected staff members as a sales manager
Customer Services User
This tick box allows you to enable the selected staff members as a customer services user
Can Sell
This tick box allows the selected staff members to sell
Only show for 'Can Sell' enabled users
Sales Outlet
This allows you to select a sales outlet from the drop down list
Add
This button allows you to add the selected outlet to the outlet list below
Outlets List
This shows the list of outlets which have been added
Save as Staff Member
This button allows you to save the entered details as a new staff member
Update
This allows you to save any changes made to an existing user
Clear All Details
This button allows you to clear all the detail above to start entering a new staff member from scratch
User Name
This shows the username for the selected staff member
Customer Type
This shows the selected customer type for the selected staff member
Password
This stored the password for the selected user (show as asterisk for security)
Access Level
This shows the access level for the user
User Enabled
This tick box allows you to enable or disable the user
Update User
This button allows you to save any changes made to the user
Create PDA Login
This button allows you to create PDA login details for this user
Clear User Alerts
This button allows you to clear all the user alerts for this user

10.3 Using the screen

10.3.1 - The list on the left shows the list of staff members (staff members which are not shown in certain screens are highlighted in red). You can limit the staff members being shown using the tick boxes below. To view the details of a staff member select them from the list and the details will be displayed on the right

10.3.2 - To create a new staff member you can either use an existing staff members details and click 'Save as New Staff Member' or click the 'Clear All Details' button to start entering a new staff member from scratch

10.3.3 - To create user details for a staff member right click on them in the list then select 'Create User Name'. You will then get the user options on the left (already populated with a suggested username), you then need to enter the username and password and then select the customer type and access level using the drop down selections

10.3.4 - To edit existing staff / user details select the staff member from the list on the left and the details are displayed on the right. Once you have made any changes click the 'Update' button to save them. If you tick 'Can Sell' you will then have more options below to specify which outlets the selected staff member can sell for

10.3.5 - You can disable a staff member by selecting them from the list and removing the tick from 'Show Staff Member in Lists in certain screens', you can also disable a number of staff members at the same time by placing ticks next to them then right clicking on the staff members list and clicking the ‘Disable Ticked Users’ option. You can enable these again by placing the tick back in the ‘Show Staff Member in Lists in certain screens’ or ticking them in the list then right clicking and selecting ‘Enable Ticked Users’

10.3.6 - If users are having issues trying to log into the system you can kick them out by ticking them in the list then right clicking and selecting ‘Kick Ticked Users’

11. User / Group Security

11.1 What this screen is used for

Creating / Renaming and Removing security groups

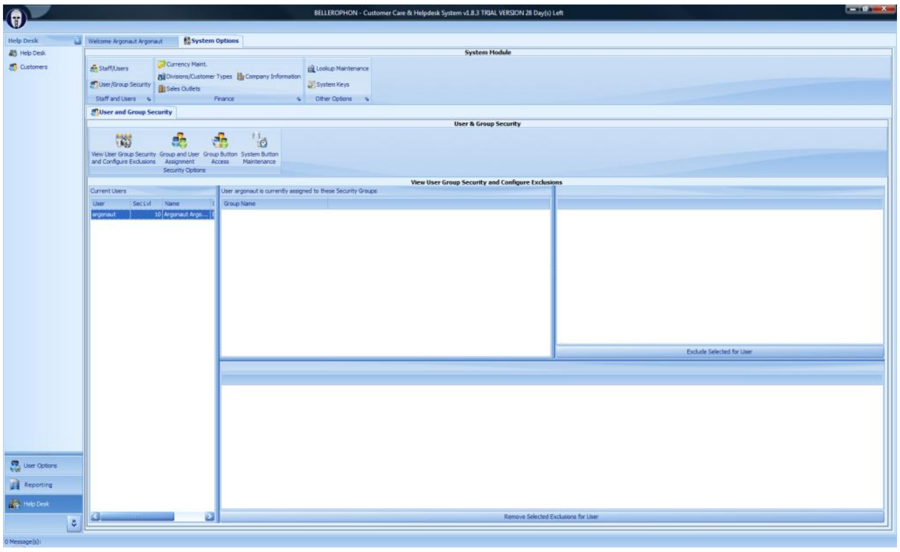
Adding / Removing selected users from security groups and setting any exclusions

Setting up access to buttons for selected security groups

Maintaining Buttons within Forms within Modules and viewing which buttons a user can access

11.2 Understanding the screens

11.2.1 Understanding View User Group Security and Configure Exclusions



Current Users list

This shows the list of the users currently setup in the system

Groups that the user is assigned to list

This shows the list of groups that the selected user is assigned to

Button access list

This shows the buttons the selected group can access

Exclude selected for User

This button allows you to exclude the selected button from the selected user in the selected group

Exclusions list

This shows the list of buttons from which the selected user is excluded from in the selected group

Remove Selected Exclusions for User

This button allows you to remove the selected exclusions for the selected user in the selected group

11.2.2 Using View User Group Security and Configure Exclusions

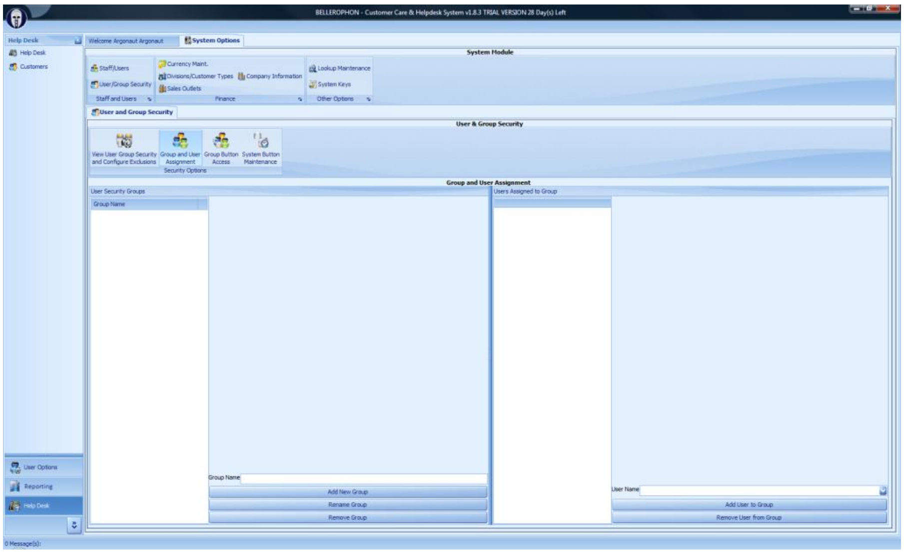
11.2.2.1 - To view and security groups and exclusions for a selected user select them from the list on the left and you will then be shown 3 lists

- The groups list shows which groups the selected user has been assigned to
- The buttons list shows the buttons which the selected group can access
- The exclusions list shows the buttons which the selected user is excluded from in the selected group

11.2.2.2 - If you wish to add extra buttons into the exclusions list select the user, then the group and then the button you wish to exclude. Click the “Exclude Selected for User” button, this will then show the new exclusion in the list below. Repeat to add more buttons to the exclusions list

11.2.2.3 - To remove an exclusion select it from the list and then click the “Remove Selected Exclusions for User”, it will then be removed from the list

11.2.3 Understanding Group and User Assignment



User Security Groups list
This shows the list of security groups currently setup in the system
Group Name
This shows the security group name selected
Add New Group
This allows you to add a new security group using the group name entered
Rename Group
This allows you to rename the selected group using the group name entered
Remove Group
This allows you to remove the selected group
Users Assigned to Group list
This shows the list of users assigned to the selected group
Username selector
This allows you to use a drop down list to select a username
Add User to Group
This button allows you to add the selected user to the selected group
Remove User from Group
This button allows you to remove the selected user from the selected group

11.2.4 Using Group and User Assignment

11.2.4.1 - You can view which users have been assigned to a security group by selecting the group from the “User Security Groups” list on the left, the users assigned will now be shown in the list on the right hand side

11.2.4.2 - To add new users to a security group firstly select the group from the groups list. Once this is selected select the user you wish to add using the drop down list in the username selector then click the “Add User to Group” button. The new name will now appear in the users assigned list above

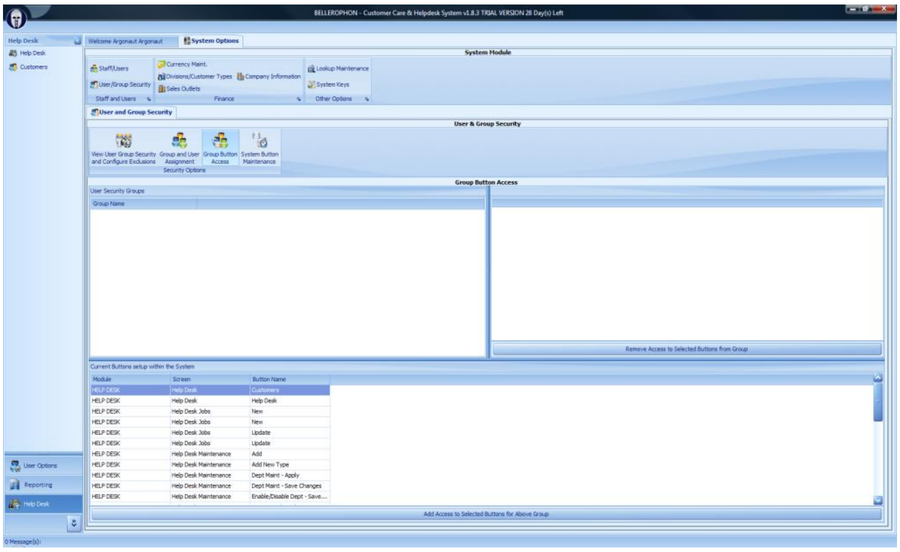
11.2.4.3 - To remove a user from a group select the group then the name you wish to remove and click the “Remove User from Group” button

11.2.4.4 - Once you have selected a group its name will be displayed in the Group Name display box. If you wish to rename the group retype what is there then click the “Rename Group” button to save the changes

11.2.4.5 - If you wish to remove a group select the group from the list then click the “Remove Group” button, it will then be removed completely

11.2.4.6 - To create a new group type a name into the Group Name display box then click the “Add New Group” button, the new group will then be added to the list

11.2.5 Understanding Group Button Access



User Security Groups list
This shows the list of security groups currently setup in the system
Buttons list per group
This shows the list of buttons the selected group can access
Remove Access to Selected Buttons from Group
This button allows you to remove access to selected button from the selected group
Current Buttons setup within the System list
This shows the list of buttons currently setup in the system
Add Access to Selected Buttons for Above Group
This button allows you to add access for the selected buttons to the selected group

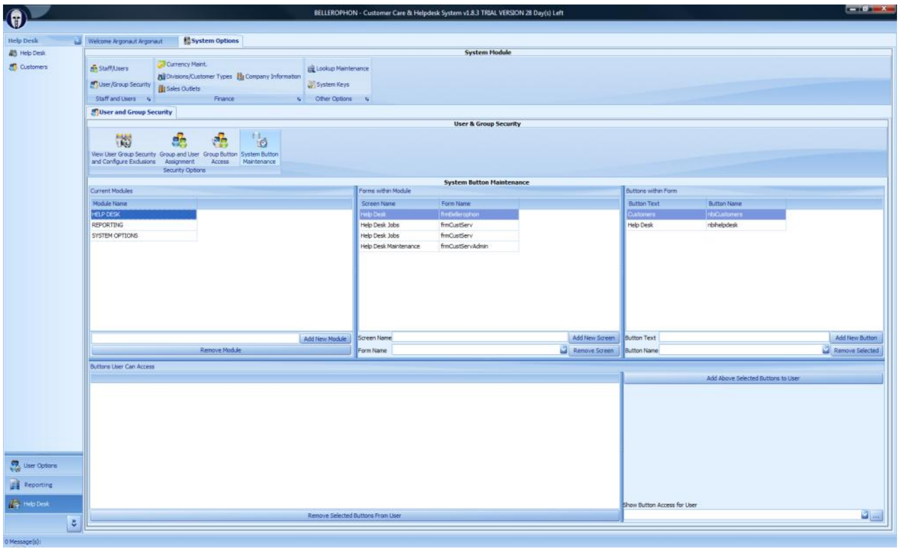
11.2.6 Using Group Button Access

11.2.6.1 - This screen shows the security groups and the buttons which each of them can access, to view which buttons a certain security group can view select the group from the “User Security Groups” list on the left, the buttons will be displayed on the right

11.2.6.2 - If you wish to remove buttons from a security group, select the group and highlight the button / buttons you wish to remove from the “The Group can Access These Buttons” list then click the “Remove Access to Selected Buttons from Group” button

11.2.6.3 - If you wish to add extra buttons to a group, select the group then highlight the button / buttons you wish to add in the “Current Buttons setup within the System” list and click the “Add Access to Selected Buttons for Above Group”. These buttons will then appear in the “The Group can Access These Buttons” list above

11.2.7 Understanding System Button Maintenance



Current Modules list

This shows the list of modules currently setup in the system

Module name

This shows the module name selected

Add New Module

This button allows you to add the entered module as a new module

Remove Module

This allows you to remove the selected module

Forms within Module list

This shows you the list of forms within the selected module

Screen Name

This shows the screen name selected

Add New Screen

This button allows you to add the entered screen name as a new screen

Form Name

This shows the form name selected

Remove Screen

This allows you to remove the selected screen

Buttons within Form list

This shows the list of buttons within the selected form

Button Text

This shows the text for the selected button

Add New Button

This allows you to add a new button using the details entered

Button Name

This shows the button name selected

Remove Selected

This button allows you to remove the selected button

Buttons User Can Access list

This shows the list of buttons the selected user can access

Remove Selected Buttons From User

This button allows you to remove the selected buttons from the user

Add Above Selected Buttons to User

This allows you to add the buttons selected in the list above to the access list for the selected user

Show Button Access for User

This allows you to select a user to view which buttons they have access to, use the drop down list

...

This allows you to action the search once you have selected a user

11.2.8 Using System Button Maintenance

11.2.8.1 - This screen allows you to view and maintain the buttons and forms within a module, to view the forms within a module select the module from the “Current Modules” list. The forms within that module will be displayed to the right in the “Forms within Module” list. The buttons within the highlighted form will be displayed to the right of that in the “Buttons within Form” list. To view the buttons within a different form just select a different form from the list

11.2.8.2 - You can add a new module to the “Current Modules” list by entering a new module name into the text box underneath the list then clicking the “Add New Module” button (this will then be added into the list above). To remove a module select it from the list then click the “Remove Module” button

11.2.8.3 - You can add a new form to the “Forms within a Module” list by entering a new form name into the “Screen Name” box then adding a form name into the “Form Name” box underneath the list. You then click the “Add New Screen” button (this will add the new form into the list above). To remove a form select it from the list then click the “Remove Screen” button

11.2.8.4 - You can add a new button to the “Buttons within Form” list by entering new information into the “Button Text” and “Button Name” underneath the list then clicking the “Add New Button” button (this will then add the new button into the list above). To remove a button select it from the list then click the “Remove Selected” button

11.2.8.5 - If you wish to view the buttons which a selected user can access select the name in the “Show Button Access for User” box using the drop down list then click the “...” button. The buttons which that user can access will then be shown in the list to the right. To remove the access from one of these buttons select it from the list then click the “Remove Selected Buttons From User” button

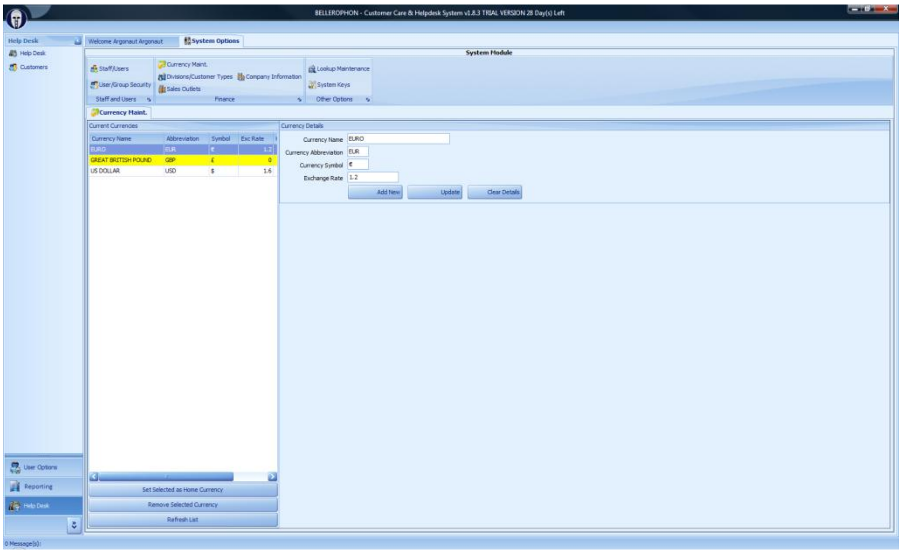
12. Currency Maint

12.1 What this screen is used for

Adding, updating and removing currencies

Setting a selecting currency as default

12.2 Understanding the screen



Current Currencies list
This shows the list of currencies currently setup in the system, the home currency is highlighted in yellow

Set Selected as Home Currency
This allows you to set the selected currency as the home currency

Remove Selected Currency
This allows you to remove the selected currency

Refresh List
This allows you to refresh the list in case there have been any changes

Currency Name
This shows the currency name

Currency Abbreviation
This shows the abbreviation for the selected currency

Currency Symbol
This shows the symbol for the selected currency

Exchange Rate
This shows the exchange rate for the selected currency

Add New
This allows you to add the entered details as a new currency

Update
This allows you to save any changes made to an existing currency

Clear Details
This allows you to clear the currency details to start entering a new one from scratch

12.3 Using the screen

12.3.1 - You can view the list of currencies setup in the “Current Currencies” list. This includes information such as the name, abbreviation, symbol and exchange rate. The default home currency is highlighted in yellow

12.3.2 - To alter a currencies details, select it from the list to show the currency details to the right. You can then alter the details and click “Update” to save the changes

12.3.3 - To add a new currency you can either use an existing currency as a template or start from scratch by clicking the “Clear Details” button first. Once you have finished entering all the currency details click the “Add New” button to create a new currency and add it to the list

12.3.4 - To remove a currency select it from the “Current Currencies” list then click the “Remove Selected Currency” button underneath

12.3.5 - To set a currency as the default home currency you need to select it from the “Current Currencies” list then click the “Set Selected as Home Currency”. This will highlight that selected currency in yellow

13. Divisions / Customer Types

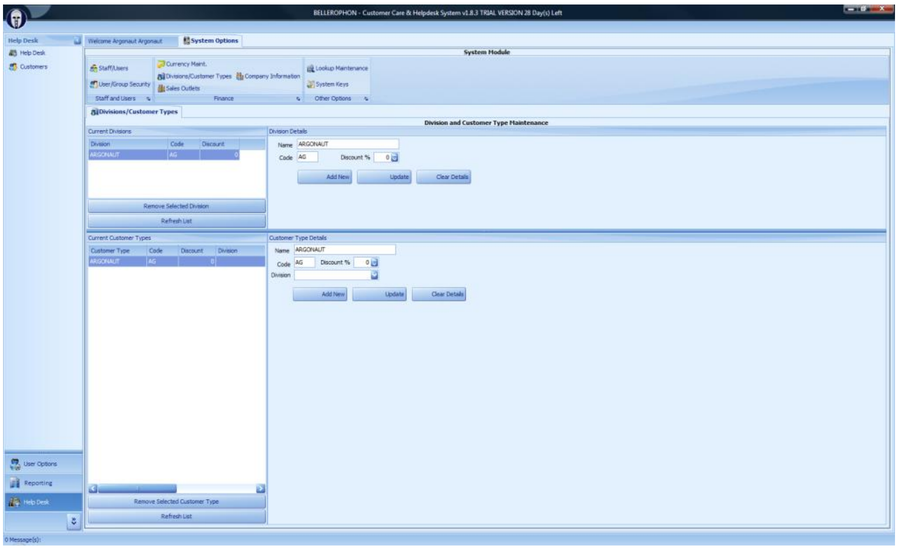
13.1 What this screen is used for

Adding, renaming and removing divisions

Adding, renaming and removing customer types

Setting discount levels per division and customer type

13.2 Understanding the screen



Divisions section

Current Divisions list

This shows the list of division's setup in the system

Remove Selected Division

This allows you to remove the selected division

Refresh List

This allows you to refresh the list in case there have been any changes

Name

This shows the name of the selected division

Code

This shows the code for the selected division

Discount %

This shows the discount for the selected division, you can change this using the up and down arrows

Add New

This allows you to add details entered as a new division

Update

This allows you to save any changes made to an existing division

Clear Details

This allows you to clear the details to start entering a new division from scratch

Customer Types section

Current Customer Types list

This shows the list of customer type's setup in the system

Remove Selected Customer Type

This allows you to remove the selected customer type

Refresh List

This allows you to refresh the list in case there have been any changes

Name

This shows the name of the selected customer type

Code

This shows the code for the selected customer type

Division

This shows the division for the selected customer type, you can select a new one using the drop down list

Discount %

This shows the discount for the selected customer type, you can change this using the up and down arrows

Add new

This allows you to add details entered as a new customer type

Update

This allows you to save any changes made to an existing customer type

Clear Details

This allows you to clear the details to start entering a new customer type from scratch

13.3 Using the screen

13.3.1 - To view a divisions settings select it from the “Current Divisions” list and the details will be displayed on the right. You can alter the settings by entering / selecting new options then use the “Update” button to save the changes

13.3.2 - To add a new division you can either use an existing division as a template or start from scratch by clicking the “Clear Details” button first. Once you have finished entering all the division details click the “Add New” button to create a new division and add it to the list

13.3.3 - To remove a division select it from the “Current Divisions” list then click the “Remove Selected Division” button

13.3.4 - To view a customer type’s settings select it from the “Current Customer Types” list and the details will be displayed on the right. You can alter the settings by entering / selecting new options then use the “Update” button to save the changes

13.3.5 - To add a new customer type you can either use an existing customer type as a template or start from scratch by clicking the “Clear Details” button first. Once you have finished entering all the customer type details click the “Add New” button to create a new customer type and add it to the list

13.3.6 - To remove a customer type select it from the “Current Customer Types” list then click the “Remove Selected Customer Type” button

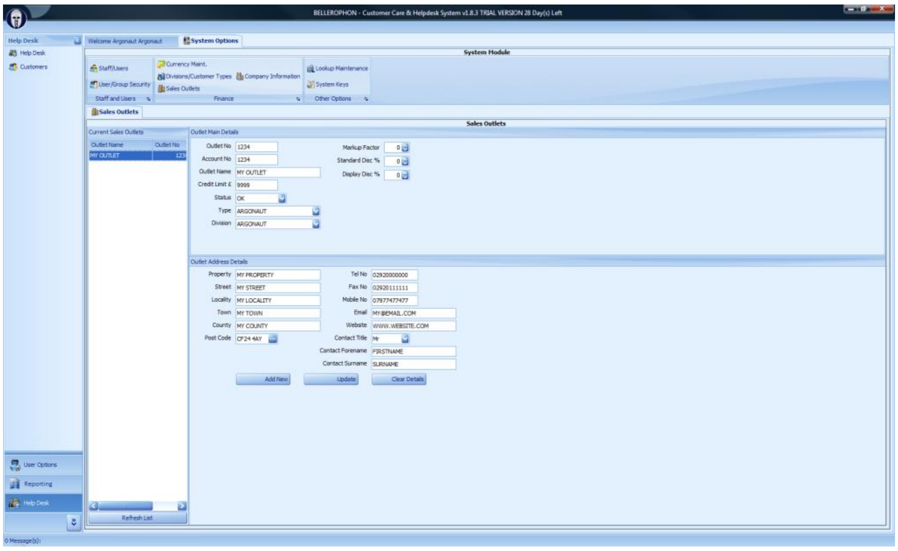
14. Sales Outlets

14.1 What this screen is used for

Adding new and updating existing Sales Outlets

Setting discount levels per outlet

14.2 Understanding the screen



Current Sales Outlets list

This shows the list of sales outlets currently setup in the system

Refresh List

This allows you to refresh the list in case there have been any changes

Outlet Main Details

Outlet No

This shows the outlet number

Account No

This shows the account number

Outlet Name

This shows the name of the outlet

Credit Limit

This shows the credit limit

Status

This shows the sales outlets current status, you can select a new one using the drop down list

Type

This shows the customer type, you can select a new one using the drop down list

Division

This shows the division, you can select a new one using the drop down list

Standard Discount %

This shows the standard discount, you can change this using the up and down arrows

Display Discount %

This shows the display discount, you can change this using the up and down arrows

Markup Factor

This shows the markup factor, you can change this using the up and down arrows

Outlet Address Details

Property

This shows the property name

Street

This shows the street name

Locality

This shows the locality

Town

This shows the town

County

This shows the county

Post Code

This shows the post code

Tel No

This shows the phone number

Fax No

This shows the fax number

Mobile No

This shows the mobile number

Email

This shows the email address

Website

This shows the website address

Contact Title

This shows the contact title

Contact Forename

This shows the contact forename

Contact Surname

This shows the contact surname

Add New

This button allows you to add the entered details as a new outlet

Update

This button allows you to save any changes made to an existing outlet

Clear Details

This allows you to clear the details to start entering a new sales outlet from scratch

14.3 Using the screen

14.3.1 - You can view a sales outlet's details by selecting it from the list. All the outlet main and address details will then be displayed to the right. You can alter the settings by entering / selecting new options then use the "Update" button to save the changes

14.3.2 - To add a new sales outlet you can either use an existing sales outlet as a template or start from scratch by clicking the "Clear Details" button first. Once you have finished entering all the sales outlet details click the "Add New" button to create a new sales outlet and add it to the list

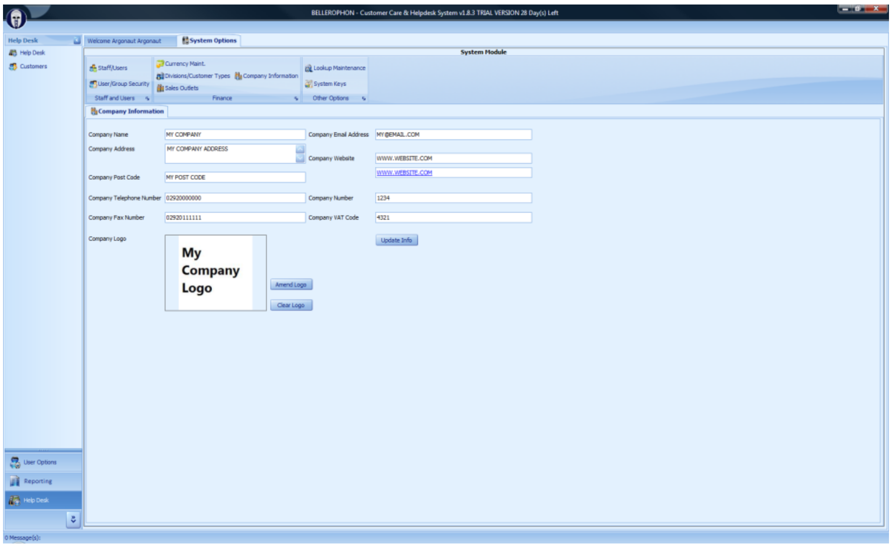
15. Company Information

15.1 What this screen is used for

Adding and updating company information

Adding, amending and removing a company logo

15.2 Understanding the screen



Company Name

This shows the company name

Company Address

This shows the company address

Company Post Code

This shows the company post code

Company Telephone Number

This shows the company phone number

Company Fax Number

This shows the company fax number

Company Logo

This shows the company logo if one has been uploaded

Amend Logo

This button allows you to amend the company logo

Clear Logo

This button allows you to clear the logo

Company Email Address

This shows the company email address

Company Website

This shows the company website address

Company Number

This shows the company number

Company VAT Code

This shows the company VAT Code

Update Info

This button allows you to save any changes made to the company information

15.3 Using the screen

15.3.1 - This screen shows the entered company information, if you wish to alter this you need to click the “Update Info” button afterwards to save any changes made

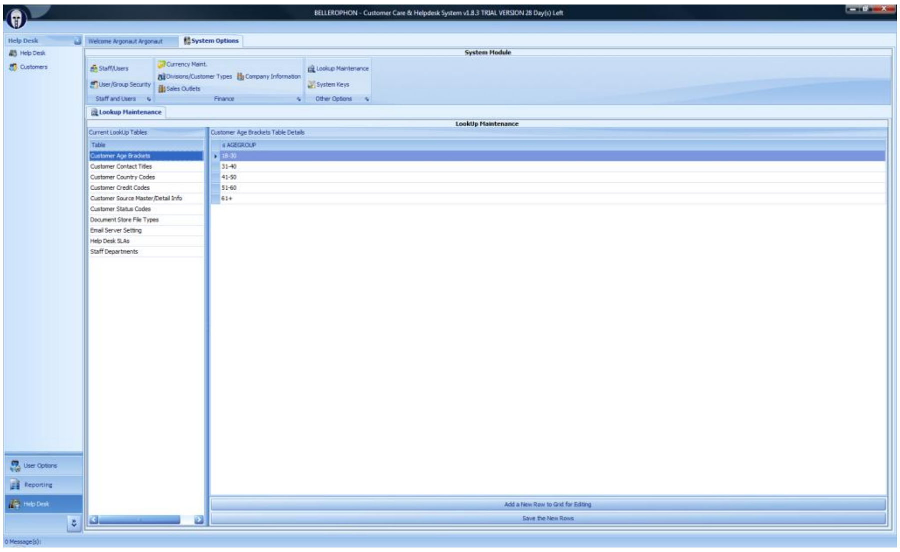
15.3.2 - If you wish to change the company logo, click the “Amend Logo” button then select a new image file to import (bmp, gif, jpg, wmf, emf, tif file formats supported). To remove the company logo click the “Clear Logo” button

16. Lookup Maintenance

16.1 What this screen is used for

Adding and updating entries on existing lookup tables

16.2 Understanding the screen



Current LookUp Tables list

This shows the list of lookup tables currently added to the system

Table Details list

This shows the table details for the selected lookup table

Add a New Row to Grid for Editing

This button allows you to add an entry into the selected lookup table

Save the New Rows

This button allows you to save any changes made to the selected lookup table

16.3 Using the screen

16.3.1 - To view the contents of a lookup table select it from the “Current LookUp Tables” list on the left and the table details will be displayed to the right

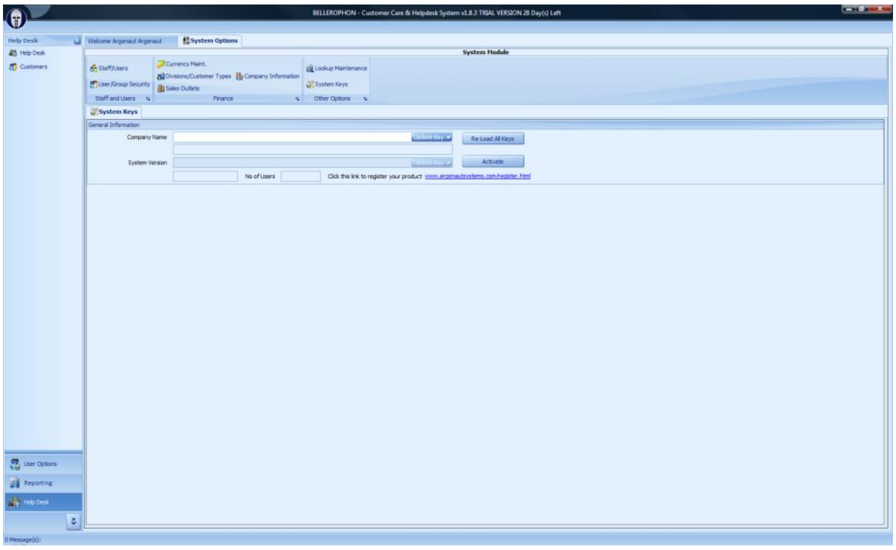
16.3.2 - To add a new row to a selected table click the “Add a New Row to Grid for Editing” button. Once the row has been added you can enter the details in the new row in the list above. Once you have finished you need to click the “Save the New Rows” to save any changes made

17. System Keys

17.1 What this screen is used for

Reloading and activating system keys

17.2 Understanding the screen



Company Name
This shows the company name key
Update Key
This button allows you to update the company name key
System Version
This shows the current system version key
Update Key
This button allows you to update the system version key
No of Users
This shows the number of users limit
Registration link
This link takes you to the product registration screen on the Argonaut website
Re-Load All Keys
This button allows you to reload all the keys
Activate
This button allows you to activate the system once the 2 valid keys have been entered
System Keys list
This shows the list of system keys currently activated

17.3 Using the screen

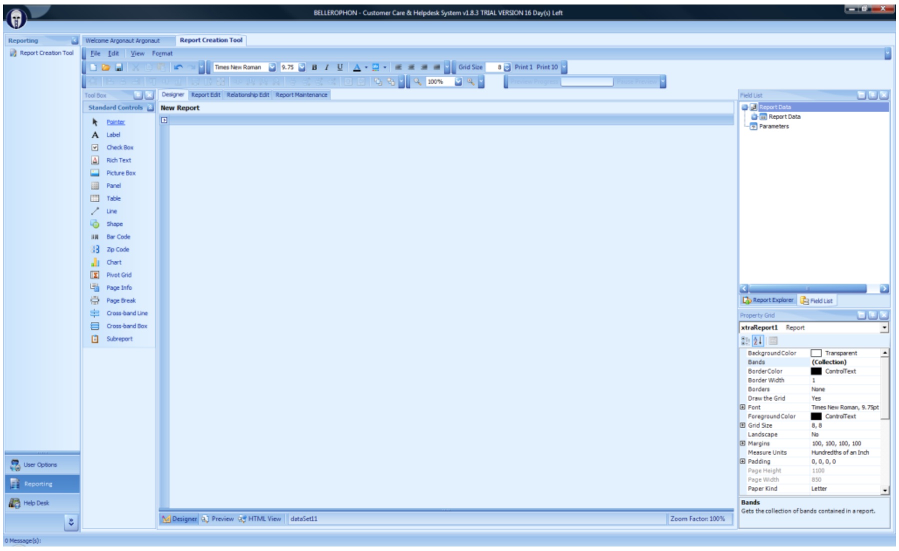
17.3.1 - This shows the system keys, you can update these by typing in new ones and clicking the “Update Key” buttons (warning: invalid keys may cause the system to stop working). If you accidently enter invalid information into one of the keys you can click the “Re-Load All Keys” button to put the old keys back in again

18. Report Creation Tool

18.1 What this screen is used for

Creating, viewing and editing reports and report components

18.2 Understanding the screen



Main window

This has all the main controls in including the standard menus, tool box, field list and the property grid

Designer

This section allows you to create the report and edit the formula, parameters, fields etc

Designer tab

This allows you to edit the main report in a designer view

Preview

This allows you to preview the current report

HTML View

This allows you to preview the current report in a HTML format

Report Edit tab

This allows you to edit the report details and contents

Selection

This allows you to add, edit and remove selections

Running Totals

This allows you to add, edit and remove running total fields

Formulae

This allows you to add, edit, remove and test formulae

Parameters

This allows you to setup and edit the parameter fields and static values

Parameter Fields

This allows you to select parameters to add to the report

Static Values

This allows you to add, rename and remove static values for the report

Relationship Edit tab

This allows you to setup the relationships between the various fields and tables and manage the links

Report Fields

This allows you to setup the relationships between the various fields and tables

Link Maintenance

This allows you to manage, add and remove selected links

Report Maintenance tab

This allows you to rename and remove previously saved reports

18.3 Using the screen

Use this as a normal reporting package to create a report

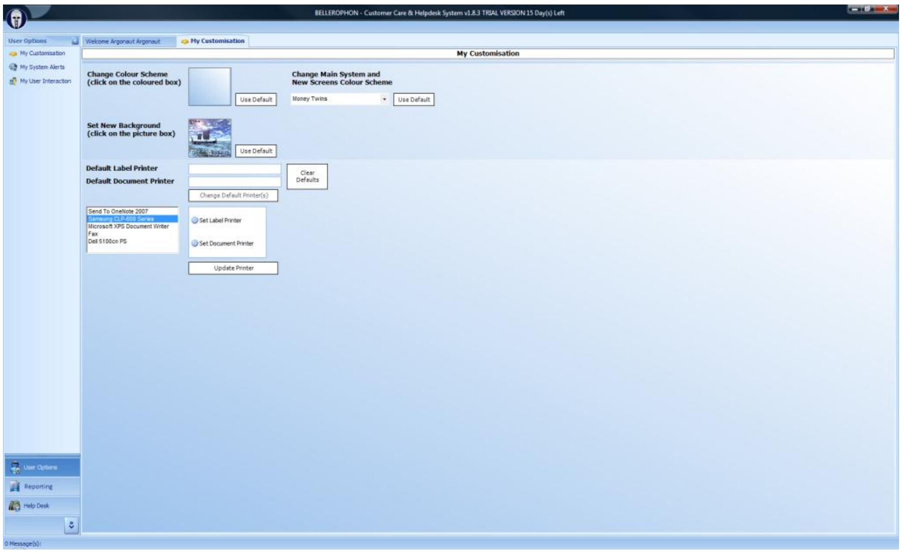
19. My Customisation

19.1 What this screen is used for

Customising the colours, scheme and background picture

Setting and adjusting the default printers

19.2 Understanding the screen



Change colour scheme
This allows you to change background colour
Use Default
This allows you to set the colour scheme back to the default colour
Set New Background
This allows you to change the main background picture
Use Default
This allows you to set the background picture back to the default picture
Change Main System and New Screens Colour Scheme
This drop down allows you to change the main colour scheme
Use Default
This allows you to set the Main System and New Screens Colour Scheme back to the default
Default Label Printer
This shows the current default label printer
Default Document Printer
This shows the current default document printer
Clear Defaults
This allows you to clear the default printers
Change Default Printer(s)
This button allows you to alter the default printers
Only shown when changing the default printers

Printer list
This shows the list of printers currently installed in windows
Set printer selector
This allows you to select which default printer you wish to alter
Update Printer
This button actions the change selected

19.3 Using the My Customisation screen

19.3.1 - This "Change Colour Scheme” box shows the current background colour for the screens. If you wish to change this click on the box and a new window will open that allows you to select a new colour, once you click

OK the screen closes and the screen background colour has now been changed. If you wish to return to the default colour click the “Use Default” button

19.3.2 - The “Set New Background” box shows the current background image. If you wish to change this click on the box and a new window will open asking you to select a new image (This needs to be in a BMP, GIF or JPG format), once you have selected the image click OPEN and the image will now have been changed. If you wish to return to the default background image click the “Use Default” button (This will only change back again once the system has ben reloaded)

19.3.3 - The “Main System Scheme” is shown at the top right. You can select a new scheme using the drop down list. If you wish to return to the default system scheme click the “Use Default” button

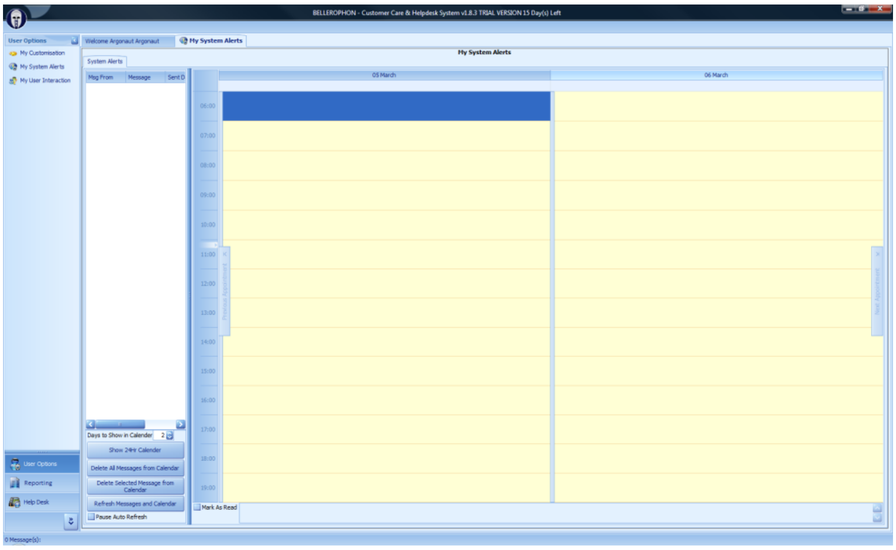
19.3.4 - The printers are shown at the bottom. To change these click the “Change Default Printer(s)” button and new options will be displayed underneath. The list of printers installed in Windows is shown on the right and the Radial selection to the right allows you to select which printer you wish to change. Once you have selected a printer and a default printer to change click the “Update Printer” button to action it (The default printer will now show the new printer selected). To clear the default printers click the “Clear Defaults” button

20. My System Alerts

20.1 What this screen is used for

Viewing and deleting your system alerts

20.2 Understanding the screen



Alerts list

This shows the list of your alerts

Days to Show in Calendar

This allows you to select the number of days to view on the calendar using the up and down arrows

Show 24Hr Calendar / Show Default Hrs

This allows you to switch between viewing a 24Hr day and the Default Working Hrs

Delete All Messages from Calendar

This allows you to delete all the messages on the calendar

Delete Selected Message from Calendar

This allows you to deleted the selected message from the calendar

Refresh Messages and Calendar

This allows you to refresh the page in case there have been any changes

Pause Auto Refresh

This tick box allows you to pause the auto refresh on the page

Calendar view

This shows your alerts in a calendar view

Mark As Read

This allows you to mark the selected message as read

20.3 Using the My System Alerts screen

20.3.1 - You can view your system alerts in a list view and calendar view, to view a system alert in the calendar view select it from the list on the left. You can alter the number of days being viewed on the calendar view using the up and down arrows next to “Days to Show in Calendar”. The “Show 24Hr Calendar”/”Show Default Hrs” button (depending on which view you are currently in) allows you to switch between viewing the whole 24 hours on the calendar or just the working hours

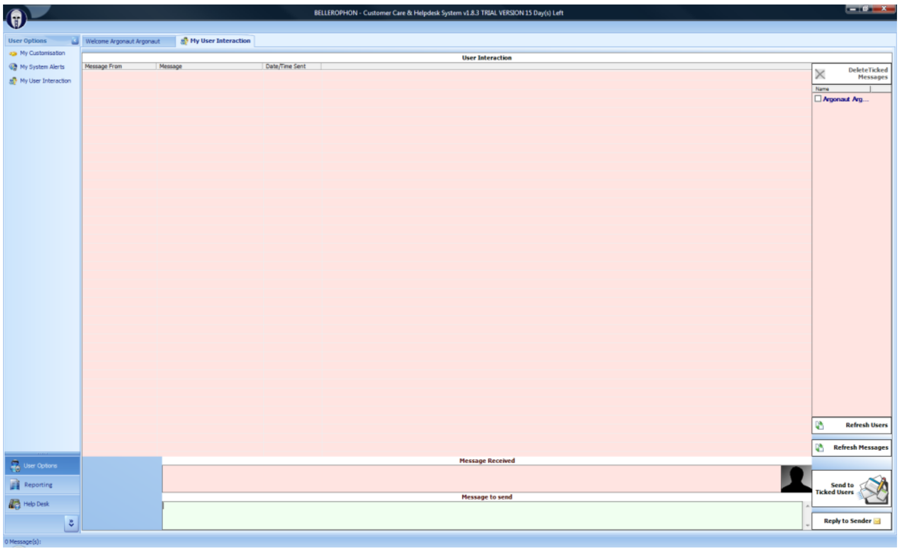
20.3.2 – If you wish to mark an alert as being looked at you need to select it from the list or calendar view then click the “Mark As Read” . When deleting alert messages you can either, select a single alert then click the “Delete Selected Message from Calendar” or delete all your alerts using the “Delete All Messages from Calendar” button

21. My User Interaction

21.1 What this screen is used for

Viewing, deleting, sending and replying to internal messages

21.2 Understanding the screen



User Interactions list
This shows the list of messages you have received

Message Received
This shows the selected message text

Message to Send
This allows you to enter text to create a new message or reply to the above message

Delete Ticked Messages
This allows you to delete the ticked messages

Users
This shows the list of users in the system, ones highlighted in blue are currently logged in

Refresh Users
This allows you to refresh the users list above

Refresh Messages
This allows you to refresh the messages list to the left

Send to Ticked Users
This allows you to send the entered text to the ticked users above

Reply to Sender
This allows you to reply to the message selected using the entered text

21.3 Using the User Interaction screen

21.3.1 - The main user interactions list shows all your internal messages which have been received. To view a message select it from the list and it will be displayed below in the “Message Received” box

21.3.2 - The “Message to send” box allows you to enter a new internal message to send. To send this message to the current message being viewed, click the “Reply to Sender” button. If you wish to send this to a user / users you need to tick them in the users list then click the “Send to Ticked Users” button

21.3.3 - If you wish to delete a message / messages you need to place a tick next to them in the “User Interactions list” then click the “Delete Ticked Messages” button

22. Contact Information

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