



Advanced Accounting Software and Secure Internet Solutions

DP/DashBoard/CRM

Enterprise Management System

Part # 440

Reports

Perform General Ledger Company Consolidation
Balance Sheets
Income Statements
General Ledger 12 Month Analysis
Financial Statement Drilldown
Bank Account Balances
Accounts Payable Aging & Drilldown
Accounts Payable Transactions & Drilldown
General Ledger Account Summary Report
Accounts Receivable Aging & Drilldown
Accounts Receivable Sales Reporting & Drilldown
Customer Inventory Sales History (4 years)
Customer Mailing Labels (customized)
Time Sheet Report
Job Cost Income/Expense Report

Overview continued on next page

SYSTEM OVERVIEW

DP/DashBoard/CRM is one of Data Pro Accounting Software's unique deployments of its **Infinity COMMERCE** technology which is built into all **Infinity POWER** accounting applications. This special technology allows companies to deploy a central web-based "Intranet" system to manage their financial reporting system and much more from inside their company's four walls to the limits of the world.

This includes a central "corporate-wide" calendar and document control system integrated with the **Customer Relationship Management (CRM)** system. Companies with varying needs and even other accounting systems (other than Data Pro's), can utilize this unique product to make better decisions and improve communications within their organizations.

SIMPLE TO DEPLOY!

DP/DashBoard/CRM is simple to deploy, readily understood in a familiar format, needs only the latest browser at the client level, and requires a **Microsoft Windows 2022, 2019, 2016, or 2012 Server, Windows 11, 10, or Windows 8** to operate.

Infinity COMMERCE enables **Infinity POWER** accounting modules to be used in a web environment. DP/DashBoard/CRM revolutionizes the way in which companies can manage their financial reporting system, including advanced "drilldowns of financial statements," **Accounts Receivable**, **Accounts Payable**, and **Check Reconciliation** detailed transaction reports, account agings and drilldowns, internal reporting systems, centralized policy management control, company location and directions, enterprise-wide document control and management, corporate phone list management, real time company-wide calendar system, project and task management, customer relationship management, sales order and time sheet creation and management, job cost management and complete flexibility for a wide range of other add-on features.

INTRANET APPLICATION

DP/DashBoard/CRM is an "Intranet" application. This means it is intended for a company to use for only its "internal staff." For companies with "technicians" in the field, an "SSL Certificate" should be used to allow easy access from tablet devices, such as Apple iPads or other tablet devices.

"PDF" SALES ORDERS/PROPOSALS!

One of the most significant uses of the product is the ability to generate totally customizable and attractive "Proposals."

These customizable proposals can then be instantly converted into "Sales Orders/Work Orders" for processing.

By implementing DP/DashBoard/CRM, the Sales Order feature allows any type of "Order" to be converted to a "PDF" and instantly "printed," "e-mailed" or "faxed" to customers from any authorized user on your network!

Changes can be made rapidly and can be fully integrated with the **Inventory Management**, **Job Cost** and **Customer Support Database** modules. This capability means that "Techs" and "Sales Staff" can now carry their "browser" based devices in the field to process orders "live" along with any users within the DP/DashBoard/CRM and "Windows" users in the accounting software.

This opens up access to users inside your office and in the field, via their "browser" based devices, such as Apple iPads, with "Bar Code Scanners."

Further, this also allows for Data Pro to create "customizations" to your copy of the DP/DashBoard/CRM without ever affecting the original source code of the **Infinity POWER** windows application code. Data Pro can insert your company's logo, address, and other key priority items you feel important to appear on your documents.

SIGNATURE CAPTURE!

More importantly, using DP/DashBoard/CRM with a portable field device, or even on a PC in your office, any **Proposal** or normal **Sales Order** can now allow the user to offer the customer the option to "sign" for the **Proposal** or the receipt of the products and services they have delivered to your customers at their warehouse, office, storefront or in the field.

Further, the customer's signature will be incorporated in a unique and secure PDF with a "time/date stamp" that can instantly be forwarded to the home office, directly to the client or wherever else you may need.

Think of the time savings and benefits this brings to your company when this can eliminate disputes over billing and when you know you have the customer's approval (in writing) for all goods and services that you are attempting to deliver. This allows for deposits to be posted to the customer's Sales Order right from their device in the field so their orders are updated instantly!

You can then archive these PDF files securely on your own network drive.

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Quotation

This Quotation is being prepared for:

Villanova Office Systems
1041 Hampton Road
Villanova, PA 17043 US
Quote #: 1049422

Contact: John Thompson
Phone: 717-763-7051
FAX: 717-763-7052
E-mail: jthompson@gmail.com
Account Hqn: PA
Date: 02/22/21

Description	Part #	Quantity	Price	Disc %	Amount
System Administrator - FoxPro Version.	100	1.00 Each	\$2,195.00	0.00%	\$2,195.00
(One Required Per System - Includes: Advanced Security Administrator, POWER Upgrade Utility, Menu Editing Tool, Forms Generator, and Infinity COMMERCE which features the POWERServer and Advanced E-Commerce Technology. Includes a 10 simultaneous user license). Annual License Fees (SLT) are 15% of Retail Price of all modules. Includes all software updates.					
General Ledger with Advanced Budgeting and Financial Statement Report Writer.	101	1.00 Each	\$1,295.00	0.00%	\$1,295.00
Accounts Payable with Vendor Management, Check Writing, EFT Processing & 1099 Printing.	102	1.00 Each	\$1,295.00	0.00%	\$1,295.00
Accounts Receivable with Customer Management Invoicing, EFT Processing & Customer Sales Analysis.	104	1.00 Each	\$1,295.00	0.00%	\$1,295.00
Inventory Management with Manufacturing Processing, Job Shop Integration, Bar Coding, Price Plans & Sales Analysis.	105	1.00 Each	\$1,295.00	0.00%	\$1,295.00
(with Standard Inventory Control, Manufacturing Processing, Job Shop Integration, Bar Coding, and Sales Analysis)					

This quotation is valid for thirty (30) days from February 22, 2021.

Print Name: _____ Date: _____ Total Retail: \$7,375.00
Title: _____ Discounts: \$0.00
P.O. Number: _____ Sales Tax: \$0.00
Total: \$7,375.00

PAYMENT METHOD & BILLING ADDRESS FOR CARDHOLDER (Note: All pricing in U.S. Dollars)

Street Address _____ Suite _____
City, State, Zip Code _____ Country _____

☐ MasterCard ☐ Visa ☐ American Express ☐ Discover ☐ Check ☐ Check # (if Applicable): _____

Note: If paying by check, order will not be processed until check is received.

Card Number: 0000-0000-0000-0000 Exp. 00/00
Name on Card: _____ Enter CVV2# (3 or 4 Number): 0000
For immediate response, fax this order form to (727) 883-1535. Verification Number (optional CVV2): 0000
(Wiring Instructions Available Upon Request / All Quotations valid for 30 days of Quote date)

Cardholder's Signature: _____ Date: _____

CREDIT CARD PROCESSING!

For superior credit card processing, your **Proposal** or **Sales Order** form can include a "Payment Method" box (similar to the example above) which allows your customers to enter their credit card information and actually sign that they agree to pay by credit card. This greatly reduces any risk for Merchants whenever there may be any credit card processing issues where the issue of customer "chargebacks" could be a concern. Empowering your field **Sales Staff** and **Technicians** with this capability allows them to expand the scope of their business and the range in which they may conduct business further than ever before. Wireless Internet is all that the user needs to stay connected to the home office.

MODULE OVERVIEW

Product Overview

Continued

CUSTOMIZATION IS EXPECTED!

DP/DashBoard/CRM is based upon **POWERServer** technology, which is why additional customization and modifications are expected and planned for within this product. It is known that many Data Pro customers will want additional “**custom**” programming features that will be unique to their business. Resellers and developers have the ability to make these modifications simply at the **DP/DashBoard/CRM** level without worrying about modifying the **Infinity POWER** accounting software source code. Further, the **POWERServer** module has the ability to allow users who write custom report models with the **Infinity POWER Report Writer** module to output these reports to the web, further allowing custom applications to expand within this format.

DP/DashBoard/CRM was a natural outgrowth to “**productize**” what many Data Pro customers have been doing for their own custom web implementations. **DP/DashBoard/CRM** and its “**Intranet**” implementation illustrates what is possible for driving a company's internal needs before a company even starts to look outward at what is possible in terms of servicing the company's customer base.

The ideal part of this product's design is that it is managing customer data in “**real time**.” There's no “**exporting**” of data to a third party application to try and piece information together or trying to create interfaces that don't work well together. When you schedule an “**event**” on the company calendar, you can even include the primary contacts from your customer's accounts and vendors with direct access to those accounts on the same screen! It's all “**live**” data working seamlessly in one system.

DP/DashBoard/CRM revolutionizes the way companies utilize **Infinity COMMERCE** to drive new business, provide better information, speed up work processes and increase employee efficiency. The inherent advanced features also provide compelling reasons to companies that are reluctant to make a conversion to a new accounting system. By comparing their current (**out of date**) system with Data Pro's features that they need today, the advantages and enabling options make the decision much easier. **Data Pro Accounting Software's** products are worth serious consideration for virtually any company. This includes small, middle market and multi-state enterprises.

EVENT CALENDAR

The calendar has a simple, full Month-at-a-Glance display and the user interface is very user-friendly. It allows users to select categories to define which calendar events are displayed in the grid. A user may view by Company Calendar or Personal Calendar, by Department or by Category. Scheduling an Event automatically generates a confirmation e-mail to all parties involved. Each scheduled Event will check for conflicts. Rollovers indicate scheduled times and the category of the Event.

February 2021
Company ID: ins | Today's Date: 2/22/21 | User ID: sysadm

<< February >> 2021 Company Calendar All Departments All Categories

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2 • Staff Meeting	3	4	5 • Payroll	6
7 • Super Bowl	8	9 • Staff Meeting	10 • Albert - Sales Call	11	12 • Sales Call with Chuck Taylor	13
14	15	16 • Staff Meeting	17	18	19 • Payroll	20
21 • Sales Call with Bill Evans	22 • Meet with Vendors - Unified	23 • Staff Meeting	24 • Doctor's Appointment			
28						

<< Previous Month Schedule Next Month >>

Categories: All Categories, Appointment, Meeting, Out of Office, Phone Call, Task Deadline, Vacation, Conference Call, Conf. Rm. 1 Setup, Conf. Rm. 1 No Setup, Conf. Rm. 2 Setup

To move the Event to a different day, you can use the drag-and-drop feature. There is also an advanced display of Events by day in which each event can be edited or deleted based on your login rights.

If your firm has many departments or locations, this feature is ideal for keeping track of a variety of sales staff, service personnel or corporate functions such as sales meetings, demonstrations, training appointments and much more! Many firms with staff in the field find it hard to coordinate within a common calendar system.

DP/DashBoard/CRM can consolidate users from a personal calendar system like **ACT!** or **Outlook** to a system coordinated at the corporate level.

Don't forget, personal calendars are kept personal while being managed against the rest of the company during appointment scheduling.

Therefore, if you set up a Doctor's appointment on Tuesday on your Personal Calendar, only you are aware of this. However, anyone else trying to book a meeting with you will be told that there is a conflict at that particular time.

Scheduling New Event for 02/22/21
Company ID: ins | Today's Date: 2/22/21 | User ID: sysadm

Description: Sales Presentation Type: Public
Event Date: 051221 Department: Sales Department
Start/End Time: 10:30A - 12:30P Category: Meeting
User ID: sysadm Event Status: Open

Comments: Meet with new clients in the conference room and show our new line of products.

Available Attendees: Franklin, Albert T., Bill Maguire, Chuck Taylor, Connors, Charles S., Elliot, Frank, Ivan Grant, Michael, Thomas
Selected Attendees: Bill Maguire, Chuck Taylor, Ivan Grant
Available Resources: Conf. Rm. 1 Setup, Conf. Rm. 2 Setup, Portable Video Screen, Projector #1
Selected Resources: Conf. Rm. 2 Setup, Portable Video Screen, Projector #1

Select Customer: Tony Swiss Construction X Select Vendor: X

Check for Conflicts: ☒ Save This Event
Quit Without Saving Save As New Event

Product Overview

Continued

PROJECT/TASK MENU

Every company is required to create and complete projects & tasks in order to succeed. DP/DashBoard/CRM allows the user to create projects and set up tasks for these projects.

MY WORKSHEET

My Worksheet combines both the Calendar (which displays your scheduled events) as well as the Projects/Tasks menu. The Calendar Events display will allow you to display up to four weeks from today's date. If you use the drag-and-drop feature, you will appreciate the ability to quickly move your scheduled Events to the next month.

DP/DASHBOARD/CRM CONFIGURATION

Various user rights levels can be assigned to each user within Infinity POWER to determine what functions and information they are able to access.

Based on the user's Login, a user will only be able to see certain menu options. The "Administrator" has rights to configure the DP/DashBoard/CRM as needed, with the capability to add, change and delete departments, users, resources and documents.

Certain images, including the company logo, can be replaced within the Configuration section. Many of the icons on the Main Menu page can be replaced by either selecting from a list of images, or by uploading your own.

COLOR STYLES SETUP

There are various color style options to choose from. Pick a style and it will be maintained (through the use of a cookie) until you change it again.

GL Analysis
Company ID: ins | Company Date: Today (02/24/21) | User ID: sysadm

Account #	Description	January	February	March	April	May	June	July	August	September	October	November	December	Total
40000	Revenue	CY \$17,196.91	\$23,242.31	\$48,001.20	\$62,851.17	\$75,467.51	\$55,678.12	\$85,314.89	\$84,244.91	\$45,578.31	\$55,611.17	\$61,258.71	\$71,591.94	\$686,037.15
		LY \$95,715.23	\$100,457.35	\$94,988.65	\$91,217.00	\$47,632.99	\$47,387.96	\$47,292.40	\$47,505.50	\$47,292.40	\$47,447.42	\$143,007.63	\$147,748.79	\$957,693.88
40000-1	Revenue - Commercial	CY \$55,261.58	\$165,000.00	\$44,019.43	\$321,608.57	\$225,611.81	\$171,366.06	\$62,501.73	\$125,679.58	\$185,468.91	\$88,918.71	\$79,501.61	\$91,887.96	\$1,616,823.75
		LY \$43,981.16	\$137,889.26	\$84,504.84	\$288,644.11	\$197,522.33	\$150,449.57	\$84,876.38	\$101,507.82	\$99,504.34	\$105,437.67	\$50,404.74	\$76,807.91	\$1,167,204.84

They will also be able to run an **Accounts Payable Aging & Transactions Drilldown** report, as well as a **General Ledger Account Summary** report. They can check their receivables by running an **Accounts Receivable Aging & Drilldown** report or they can view both current and past sales with the **Accounts Receivable Sales Reporting & Drilldown** menu option as well as run a **Sales Code Summary** report. This, of course, assumes they have these respective accounting modules installed as well as the user rights to see them!

12 MONTH SNAPSHOT OF 2 YEARS OF ALL INCOME STATEMENT VARIATIONS!
One of the best financial features added to the product is the "Current Year/Last Year" 12 Month version of all Income Statements! This makes for great instant analysis for all corporate managers and owners. No exporting of data to Excel required!

<< February 2021 >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

Select The Date Range for the Report

Beginning Date: 02/01/21

Ending Date: 02/28/21

View Report

Many of these reports require the user to select a date range and report type, while others prompt the user for certain criteria.

Income Statement Report
Company ID: ins | Company Date: Today (02/23/21) | User ID: sysadm

Income Statement - Normal

Infiniti POWER Sample Company, Inc.
Statement of Income

Current Period: 2/23/21

Revenue	Cost of Goods Sold	Operating Expenses	Gross Profit
Revenue - Commercial	\$20,578.55	\$37,775.46	\$12,122.12
Revenue - Residential	\$15,000.00	\$27,307.90	\$12,122.12
Revenue - Commercial	\$28,183.00	\$44,147.18	\$12,122.12
Revenue - Residential	\$2,971.69	\$2,971.69	\$12,122.12
Revenue - Commercial	\$30,800.00	\$30,800.00	\$12,122.12
Revenue - Residential	\$1,847.00	\$1,847.00	\$12,122.12
Cash Discounts Earned	\$2,042.21	\$2,468.38	\$12,122.12
TOTAL INCOME	\$279,828.65	\$311,717.42	\$100.00
Cost of Sales	\$5,097.24	\$15,866.83	\$12,122.12
Concrete COG - Commercial	\$27,307.90	\$27,307.90	\$12,122.12
Concrete COG - Residential	\$3,780.00	\$3,780.00	\$12,122.12
Framing COG - Commercial	\$8,915.30	\$8,915.30	\$12,122.12
Framing COG - Residential	\$3,935.66	\$3,935.66	\$12,122.12
Roofing COG - Commercial	\$4,547.63	\$4,547.63	\$12,122.12
Roofing COG - Residential	\$2,214.03	\$2,214.03	\$12,122.12
TOTAL COST OF GOODS SOLD	\$173,417.76	\$181,479.10	\$12,122.12
GROSS PROFIT	\$107,410.89	\$120,248.32	\$12,122.12
Wages and Salaries	\$10,866.08	\$42,597.20	\$12,122.12
Salaries - Commercial	\$12,535.00	\$12,535.00	\$12,122.12
Salaries - Residential	\$3,337.50	\$3,337.50	\$12,122.12
OB Expense Allocation	\$1,804.20	\$1,804.20	\$12,122.12
Autoclave Expense	\$0.00	\$0.00	\$12,122.12
Insurance	\$96.54	\$96.54	\$12,122.12
Insurance - Worker's Comp.	\$176.97	\$176.97	\$12,122.12
Telephone Expense	\$194.15	\$194.15	\$12,122.12
Deprec - Buildings	\$68.36	\$68.36	\$12,122.12
Deprec - Equipment	\$1,960.48	\$1,960.48	\$12,122.12
Deprec - Furniture	\$230.29	\$230.29	\$12,122.12
OPERATING EXPENSES	\$42,597.20	\$42,597.20	\$12,122.12
TOTAL OPERATING EXPENSES	\$120,248.32	\$120,248.32	\$12,122.12

Accounts Receivable Sales Reporting & Drilldown
Company ID: ins | Company Date: 02/17/21* | User ID: sysadm

Trans Date: 02/23/21 Customer: JONJ1 - Sonia Jones Interior Design

Trans Num: 69348 Customer Contact Denise Jones

Trans Type: Inv Phone: 813-562-2654

Trans Desc: Invoice E-mail: sonia@indesign.com

IM Item	Sales Code	Description	Quantity	U/M	Unit Price	Extended Price	COS Amount
40 801 6134	31200	Electrical Outlet Box	1.00	EA	\$127.33000	\$127.33	\$45.84
60 6 107	31200	2" Wire Clamp	22.00	EA	\$2.12000	\$46.64	\$24.64
60 7 131	31200	Electric Box - Fuses	14.00	EA	\$3.45000	\$48.30	\$25.90
60 8 112	31200	Meter (Glass Case)	1.00	EA	\$27.88000	\$27.88	\$12.79
60 8 126	31200	Electric Box Pole Stand	1.00	EA	\$72.00000	\$72.00	\$34.22

REPORTS & DRILLDOWNS

Many customers have purchased the DP/DashBoard/CRM simply for the reporting capabilities. Someone with full viewing rights will be able to perform a **General Ledger Company Consolidation**, run a **Balance Sheet**, review an **Income Statement**, generate a **Financial Statement Drilldown** and review their **Bank Account Balances**.

Accounts Receivable Sales Reporting & Drilldown
Company ID: ins | Company Date: Today (02/23/21) | User ID: sysadm

Sales Report from 02/16/21 to 02/23/21

Date	Trans #	Type	Customer	Description	Sale Amount	COS Amount	Pay/Dep Amount
02/18/21	6133	Pay	Fred Hart	Payment			\$4,237.15
02/21/21	10409	Adj	National Auto Parts	Record Shipment (SO)	\$0.00	\$0.00	
02/21/21	10409	Adj	National Auto Parts	Record Shipment (SO)	\$0.00	\$0.00	
02/21/21	69079	Inv	Atlanta Hardware Shops Inc.	Built Shed	\$7,021.55	\$1,607.29	
02/21/21	69079	Inv	Fred Hart	Sheds	\$2,153.63	\$679.83	
02/21/21	69080	Inv	National Auto Parts	Sheds	\$11,339.71	\$2,446.39	
02/21/21	69081	Inv	Cash Sale, Thank You!	Invoice	\$270.00	\$168.75	
02/22/21	68845	Pay	Fred Hart	Payment			\$7,643.95
02/23/21	69347	Inv	Sonia Jones Interior Design	Invoice	\$397.15	\$0.00	
02/23/21	69348	Inv	Sonia Jones Interior Design	Invoice	\$397.15	\$184.67	
				Totals:	\$21,619.19	\$5,086.93	\$11,881.10

Sales Code Summary Report

Sales Report from 02/16/21 to 02/23/21

Product Overview

Continued

CUSTOMER SUPPORT

Data Pro designed a "Tickler" and "Ticket" system to keep track of its own support traffic. It worked so well, we decided to incorporate it into the **DP/DashBoard (CRM)** product. Here's how it works: If a customer calls in with a question or problem, an operator can "Add a New Tickler" for that customer, adding a brief description of their question or problem, and thus create a record of that call.

Once saved as a **Tickler**, it will appear in the "Tickler" list for the support staff to retrieve. While entering the Tickler information, the operator has access to the customer's payment history, past due aging history as well as any notes on that customer. If it is determined that action should be taken on this Tickler, you can "Create a Support Ticket."

To create a Ticket, the Tickler information is added to the Ticket and a starting time is set. This way, there will be an exact record of time spent on each call. The support representative can select a billing type and it will calculate the billing quantity. A unique "Ticket Number" will be created, useful for future lookup or reference. You may review, add or edit a customer's Support Tickets at any time.

You may say, we don't charge customers for support. Fine! How about when they call your front desk to complain about a product or service or if you need to escalate the call? What manager gets to deal with these issues? How do you know that your employees have followed up with every inquiry or complaint? Has the customer been satisfied? Are there any notes on the customer's file to indicate how the problems were resolved, billed or otherwise? As a "Service Technician" in the field, what if the initial "Ticket" requires more action and needs to become a "Sales Order" where by "inventory and labor" items become involved and need

PURCHASE ORDER	
DATE	PURCHASE NO.
03/04/21	10033
ACCOUNT NO.	LAST DATE
TAM1	03/19/21

Infinity Warehouse 21884 N. Dale Mabry Tampa, FL 33634	Infinity POWER Sample Company, Inc. 111 2nd Avenue NE Suite 1000 81 Palmettoburg FL 33591 USA Phone: 727-483-1500
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DESCRIPTION	NEED BY	LAST DATE	VENDOR SO NO.	SHIPPING INSTRUCTIONS
Record# 00	03/04/21	03/19/21	00603	Delivered to Warehouse

QTY	M/M	PART #	DESCRIPTION	UNIT PRICE	DISC %	EXTENSION
40.00	Feet	40 779 011	100' Heavy Gauge Copper Wire	\$29.75	0.00%	\$1,200.00
65.00	Feet	40 779 014	50' Heavy Gauge Copper Wire	\$24.44	0.00%	\$1,590.60
12.00	EA	40 801 0134	Electrical Outlet Box	\$45.84	0.00%	\$550.08
144.00	EA	40 6 107	2" Wire Clamp	\$1.12	0.00%	\$161.28
200.00	EA	40 7 121	Electric Box - Fuses	\$1.85	0.00%	\$370.00
10.00	EA	40 8 112	Meter (Glass Case)	\$12.79	0.00%	\$127.90
6.00	EA	40 8 126	Electric Box Pole Stand	\$34.22	0.00%	\$205.32

Add / Change Tickler

Company (Dr. Co.) Company Order (Dr. Co.) Your Dr. Co. Order

Cust. # JON11 Customer Aging
 Co. Name: Santa Jones Interior Design
 Contact: Denise Jones
 Address: 9011 Cleveland Avenue
 Unit 609
 Clearwater, FL 33612
 Region: TPA

Phone: 813-562-2654
 Fax: 813-562-2651
 Email: santa@indesign.com
 Special: Residential
 View Inventory Sales History
 Schedule Event | Add Order

Tickler Date: 03/14/21 Support Rep: PUB
 Customer # JON11 Customer Name: Santa Jones Interior Design
 Contact: Denise Jones Phone Number: 813-562-2654
 Ticket Number: 015431 Check Description: Product Warranty Issue
 Comment: Defective Materials Please contact Denise
 Comment:

Save Changes Save & Create Ticket Save & Create Order Save and Complete OFF A On

Add to Record

to be billed. This module is fully integrated with the **Sales Order Entry** and **Inventory Management** modules! There is no company in business today who does not have "customers." They all have to be managed and easily accessed. Some are billable support issues, others are warranty based. All need to be tracked. This is another invaluable feature of **DP/DashBoard (CRM)** that your staff could even handle from home!

CHANGE CUSTOMER PROFILE

A customer's profile can be changed or updated at any time within **DP/DashBoard (CRM)**. Is this important? What if all of the mailings you send them

are going to the wrong address? What if the bills are going to the wrong place?

Client communication is the most important thing that can be incorporated into your business. **DP/DashBoard (CRM)** makes it easier than ever for your staff to keep this information up to date without providing everyone complete access to the entire accounting system.

VIEW PURCHASE ORDERS

This option allows you to view existing purchase orders. You can convert it to a PDF, which can be saved to a PDF, e-mailed to a vendor or printed with your logo and the Purchase Order data. You also can insert signatures showing your approvals.

INVENTORY ITEM INQUIRY

This option allows you to search for a specific inventory item. You can search inventory items by inventory item number or by a keyword description. Once selected, the item displays availability, cost levels, unit of measures, etc.

VIEW INVENTORY SALES HISTORY BY CUSTOMER

This option allows you to view a customer's sales history. You can drilldown by invoice number to display a listing of the complete transaction detail. This feature is also accessible when entering both Ticklers and Tickets.

View Inventory Sales History by Customer

Find on this page:

Three Year History

Inv. #	Type	Inv. #	Customer	Item #	Description	Qty	Unit	Unit Price	Ext. Price	Add to Cart
02/23/21	Invoice	00349	000	10 002 15322	Cement	5.00	Bag	\$32.0000	\$160.00	
02/23/21	Invoice	00349	000	30 502 2311	4" X 8" Floor Tiles	63.00	EA	\$11.5000	\$724.50	
02/23/21	Invoice	00349	000	30 501 1408	12" X 18" Tiles	30.00	EA	\$6.5000	\$195.00	
02/23/21	Invoice	00349	000	30 501 1470	8" X 12" Tiles	22.00	EA	\$5.2500	\$115.50	
02/23/21	Invoice	00349	000	40 779 011	100' Heavy Gauge Copper Wire	14.00	Feet	\$96.0000	\$1,344.00	
03/05/20	Invoice	00232	000	50271013	Lightweight Sandblasts	1.00	EA	\$9.7000	\$9.70	
03/05/20	Invoice	00232	000	60826	Electric Box Pole Stand	10.00	EA	\$82.0000	\$820.00	
03/05/20	Invoice	00232	000	607131	Electric Box - Fuses	100.00	EA	\$3.9700	\$397.00	
03/05/20	Invoice	00232	000	606107	2" Wire Clamp	100.00	EA	\$1.1200	\$112.00	
03/05/20	Invoice	00232	000	40801614	Electrical Outlet Box	200.00	EA	\$16.4300	\$3,286.00	
01/05/19	Invoice	00215	000	60826	Electric Box Pole Stand	10.00	EA	\$82.0000	\$820.00	
01/05/19	Invoice	00215	000	607131	Electric Box - Fuses	100.00	EA	\$3.9700	\$397.00	
01/05/19	Invoice	00215	000	606107	2" Wire Clamp	100.00	EA	\$1.1200	\$112.00	
01/05/19	Invoice	00215	000	40801614	Electrical Outlet Box	200.00	EA	\$16.4300	\$3,286.00	

Back to Previous View Inventory Sales History by Customer Back to Main Menu

Product Overview

Continued

PAYROLL TIME SHEETS

The **Payroll Time Sheets** options provide internal users within the firm with the ability to key in their daily time sheets without having to provide users direct access to the Payroll program and/or the Payroll data files. Based on the security rights set up in Advanced Security and the employee number set up in the **DP/DashBoard/CRM Set Up Users** option, an employee can enter his or her own time.

Depending on set up in Advanced Security, an employee will be only allowed to view their employee number. Also, integrated to the Job Cost module, an employee can enter a job and cost code for their time. No rates are shown on the screen. The system picks up the rates set up for the employee in the Payroll module. It will automatically increment the date/reference number allowing for multiple entries by day. No posting is done to the Payroll until the Payroll employee updates for time sheets are posted through the normal Post Time Sheets transaction menu option.

JOB COST MANAGEMENT

Job setup, management, billing and running reports are all within **DP/DashBoard/CRM's** capabilities. Set up a job by entering all of your pertinent information, including specifying the project type, the contract amount, begin and end date, price level, etc.

Then, select cost codes with descriptions, place an order and view Job Reports, such as Job Income/Expense Reports (*view by Job Detail or Cost Code Summary as shown below*) and Manage Job Detail Reports, all within **DP/DashBoard/CRM!**

Although integrated with the Time Sheet module, depending on the Security Rights set up in Advanced Security, employees will not be able to see the various Job Cost Management menu options unless they have been given rights to view Job Cost information from within **Infinity POWER**.

MANAGE JOB CREWS

This special option in **DP/DashBoard/CRM** allows those users that have access to a laptop, PC or tablet device to **"Manage Job Crews."** This option is fully integrated with the **Payroll, Time Sheet Entry** and **Job Cost Main Module**. It allows a manager or foreman of a crew to **"Clock In and Clock Out"** crew members throughout the day as they show up for work on a job site, take lunch breaks, and shift from one job to another. This is ideal where it isn't convenient for a time clock hardware/software system to be installed in the field.

MAPS & DIRECTIONS

Data Pro has a map page on its web site that we send our customers to when they need directions to our Corporate offices. The **DP/DashBoard/CRM** application installs with a link to that map. This is an example of what a company can do with this option. If you have a map document or a map image, you can set it up using the **"Add New Document"** option. If you have a web page, you can set it up using the **"Add New Link"** option.

INTERNAL PHONE LIST

There are two sections of the **Internal Phone List**. Both sections require user input. The top section contains the **Corporate Address** and **Phone Numbers**, as well as a place for a picture or graphic. The **"Administrator"** has rights to

change both the information as well as the picture.

The bottom section contains all of the **"Users"** which have been entered by the Administrator. The available fields are: **Name, Title, Department, Location, Phone Number, Extension, Cell Phone** and **E-mail**.

As users are entered into the system, they will appear not only here, but also in the **Calendar** and **Worksheet** as available **"Attendees"** when scheduling Events. This is also a **"sortable"** list by clicking the column header. Since it is browser-based, accessing a company directory from anywhere is quite convenient when trying to reach other members of the staff.

Product Overview

Continued

DOCUMENT MANAGEMENT

Much of our time is spent finding and updating documentation and sales materials. Once these materials have been updated or created, they must then become accessible to the employees and management within your organizations. Some of this documentation is legal in nature and has to be distributed to protect the interests of the company. For instance, how many companies have a "Company Policy Manual" in place where any of their employees can easily download or access a copy for instant reference? In many large firms, this may occur. However, time after time, we find many companies are not in compliance with human resource requirements.

A good corporate "Intranet" can pay for itself just by the access it provides to key information and documents, and for the savings that can be realized by reducing printing costs over time. This is just the beginning.

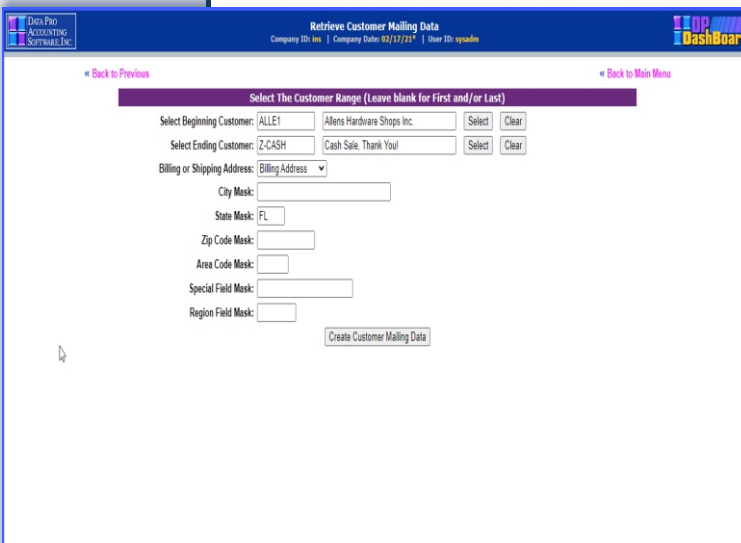
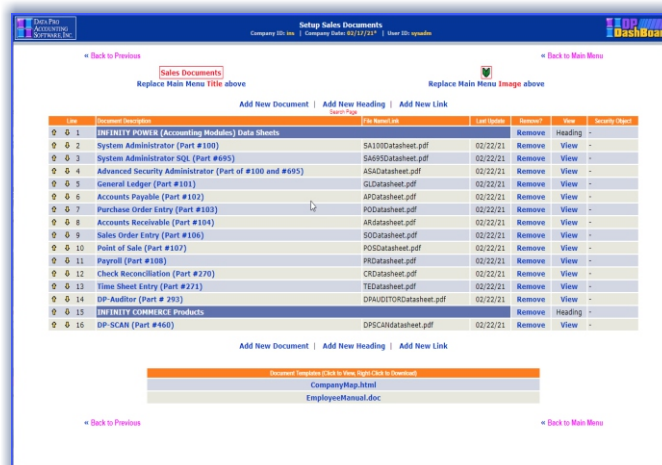
If you owned a car dealership with seven models of cars being sold, that's a lot of sales and marketing materials to keep track of! How would any of these firms manage the number of technical and sales documents required for all of these variations?

The DP/DashBoard/CRM includes a document and file inventory and management system. The system includes six standard menu options to maintain your documents and files. More can be added. Within each of these options, subcategories can be set up as needed. Both the menu titles as well as the subcategories can be defined by you. DP/DashBoard/CRM will allow the upload of various file formats, including: .txt, .jpg, .gif, .png, .html, .htm, .asp, .doc, .pdf, .xls, .ppt, .pps, .swf, .tmp, .chm, .aspx and .rpt.

Whether your file is a Microsoft Excel document or an image file (i.e. "jpg"), it can be uploaded and added to your document or file list. An added feature incorporates the

Security System Object within **Infinity POWER**, which has the ability to make certain documents or files accessible only to those individuals or groups with accounting rights to see them.

The "Document Management" feature is not to be confused with a document collaboration software system where everyone is trying to compose a common document.



COMPANY CONFIGURATION

You can add or remove companies from the DP/DashBoard/CRM as needed. Once the companies have been added to the list of companies, any company can be easily selected and become the "Active" company.

CUSTOMER MAILING LABELS

The DP/DashBoard/CRM provides the ability to print mailing labels for customers by "Billing or

Shipping Address." It allows you to use "Masks" which provides you the ability to target geographic areas such as Cities, States, Zip Codes, Area Codes and other user defined Regions and special coding schemes. It is reading data directly from the Accounts Receivable data files so the labels are as current as the last posting to the AR system.

This is the same feature you would use to export your data to your favorite e-mail broadcasting program, such as MailChimp or Campaigner! You can also save the label format to a "PDF File" and/or export it to an "Excel CSV" file for "mail merges" into Microsoft Word for use with other documents.

Additional Product Features

There are several useful features incorporated into DP/DashBoard/CRM.

- By clicking on the DP/DashBoard/CRM logo, a small pop-up menu will appear. This is a very useful option, because there may be a time when you would like to open a file in another browser window while still maintaining your present page.

- The Calendar and Worksheet have a button (**bottom left**), which will allow you to automatically refresh these pages. You can set the time between automatic reloads. This assures that the most current information is being displayed.

- Several Options contain a "Search Page" feature, including the Internal Phone List page and the Documentation pages.
- The main menu utilizes a collapse/expand feature which, as new menu options are added to the DP/DashBoard/CRM, may become very useful for managing the menu system.
- Certain menu options contain rollover boxes with important information pertaining to that specific option. These are especially useful in the Calendar and Worksheet sections.
- Many of the reports have a sorting capability built in. Simply click on the category of a column to sort the report.
- Check a Customer's Payment History (*with the ability to immediately reprint/fax/e-mail an invoice*).
- View a Customer's Aging Report.
- Read/Create Notes for a Customer.
- The software remembers where you were when you exited the software.

- If your system "times out," once you log back in, you will be brought back to the previously visited page.
- To log out of the DP/DashBoard/CRM, click the "EXIT" link in the blue bar on the bottom right of any page.

- Each of the hyperlinks on a page create a new link to another window. The "Trans #" below will allow you to see the original invoice that created this transaction for this customer and allow you to e-mail it to them in a PDF!

Total Balance	Current	31-60 Day	61-90 Day	91-120 Day	Over 120
\$9,560.14	\$3,671.89	\$3,384.18	\$2,504.07	\$0.00	\$0.00

Date	Type	Trans #	Description	Amount	Due Date
12/07/20	1	69345	Invoice	\$6,741.22	01/06/21
01/01/21	1	69344	Invoice	\$3,384.18	01/31/21
02/09/21	1	69346	Invoice	\$3,671.89	03/11/21
02/18/21	8	8133	Payment	\$4,237.15	

System Requirements



DP/DashBoard/CRM Requirements

DP/DashBoard/CRM must be installed on a **Microsoft Windows 2022, 2019, 2016, or 2012 Server, Windows 11, 10 or Windows 8** with **Microsoft Internet Information Server (IIS)** installed. All users accessing the DP/DashBoard/CRM are required to have a current version of **Internet Explorer, Google Chrome, Mozilla Firefox or Safari**. If all users accessing the DP/DashBoard/CRM are located within the same network and behind the same firewall, the installation may be done on the same server as the current accounting server, providing there are enough resources on the server (*i.e. processor speed, memory and disk space*).

If any users are to be accessing the DP/DashBoard/CRM from other locations (*i.e. Branch Offices, Home Offices, Mobile Users*), we recommend that the DP/DashBoard/CRM be installed on a separate server from the accounting server. Further, all remote connections to the DP/DashBoard/CRM should be made through a **Virtual Private Network (VPN)** connection for security purposes, or the client should implement their own “**SSL Certificate**” for any outward facing implementation of DP/DashBoard/CRM.

Infinity POWER Software Requirements

DP/DashBoard/CRM is highly integrated with a wide variety of **Infinity POWER** accounting modules. New and existing users should be aware that they must have installed all of the necessary **Infinity POWER** accounting modules for all DP/DashBoard/CRM features to be accessible. Otherwise, these features will simply not be available until these modules are installed.

For all DP/DashBoard/CRM features to be accessible, these modules are necessary:

System Administrator	(Either Part #100 - Standard Version or Part #695 - Client/Server SQL Version - Includes the required POWERServer, Advanced Security Administrator module, Forms Generator, Menu Editing Tool and all Infinity COMMERCE web tools)
General Ledger	(Part #101 - For Balance Sheet/Income Statement/Consolidation and GL Drilldown Features)
Accounts Payable	(Part #102 - For Accounts Payable Agings, Transaction Reports with Drilldowns)
Purchase Order Entry	(Part #103 - For Sales & Purchasing options such as “ View Existing Purchase Order. ” Must have Accounts Payable module for all Purchase Order functions to be available)
Accounts Receivable	(Part #104 - For Accounts Receivable Drilldowns, Agings, and Transaction Reports. It is also required to use the Customer Support module that is included with the DP/DashBoard/CRM product. This is required for the Add/Change customer Setup Options and Support Tickler and Ticket Options)
Inventory Management	(Part #105 - For Inventory Item Inquiry, Sales Order, and Purchase Order options)
Sales Order Entry	(Part #106 - For Sales & Purchasing options such as “ Add New Sales Orders ” and “ View Existing Sales Orders. ” Must have the AR module for all Sales Order functions to be available)
Payroll	(Part #108 - For Time Sheet Entry Options, which also requires the Time Sheet Entry module)
Job Cost Main Module	(Part #200 - Add/Change Job, Manage Job Detail, Job Income/Expense Report, Create PO from Job, and Enter Job Billing)
Check Reconciliation	(Part #270 - For the Bank Statement “ Drilldown ” features)
Time Sheet Entry	(Part #271 - For Time Sheet Entry Options. Must have the Payroll module to utilize this feature)
Customer Support Management	(Part #275 - [Included with DP/DashBoard/CRM] - For Customer Support features)
DP/AUTO Event Triggering System	(Part #450 - The “ CalendarAlerts ” script sends an e-mail notification of upcoming calendar events scheduled in DP/DashBoard/CRM and the “ CalendarWorksheet ” script e-mails a daily worksheet of calendar events and pending tasks)

Infinity POWER with the **POWERServer** module may be installed on any of the currently supported platforms, such as **Microsoft Windows 11, 10 and Windows 8, Windows 2022, 2019, 2016, or 2012 Server**. The **Infinity POWER** accounting system can be installed with any of our supported databases which include support for **FoxPro, dBase IV, Microsoft SQL Server 2022, 2019, 2016, 2014, 2012, & 2008**. All networks must support a **TCP/IP**- based network protocol.