

(Version 7.63)

Infinity COMMERCE

DP/DashBoard/CRM

(Enterprise Management System)

(Part #440)

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CHAPTER 1 INTRODUCTION

Data Pro Accounting Software's **DP/DashBoard/CRM** is a revolutionary technology that extends Data Pro's **Infinity COMMERCE** technology in many exciting ways that allows firms, of all sizes and shapes, to manage their business from a completely different point of view. Depending on the company's specific needs, this product is targeted to address a wide range of *internal* needs for management and its staff alike.

As such, where Data Pro's e-commerce technology is easily used for doing business on the web with a company's customers, the **DP/DashBoard/CRM** system is primarily targeted for a company to use with its *internal* customers. In other words, this is primarily about doing business with a company's staff.

With this thought in mind, upper management has to be engaged from the beginning for any successful implementation of this product to occur. For those responsible with the task of deploying this product for the company, it is important to know from the beginning "*what the target is*" or the primary mission that you are trying to achieve before you start setting up the variety of features you will find throughout this product.

More and more, using the **DP/DashBoard/CRM** product has evolved into a more power **Sales Order Entry** tool which can be "**highly customized**" and "**tailored**" to meet the unique demands of a service organization with in-field sales and service staff. This provides these companies with the ability to add a secure **SSL Certificate** to their web server and allow the **DP/DashBoard/CRM** product to not only support the company's internal accounting users, but also their "**outside**" field staff and remote offices.

As such, the rise in use of the product with Apple iPads, Laptop PC computers and other Tablet devices has skyrocketed over the last several years. Processing the delivery of products to customers using a Bluetooth bar code scanner in the field and accepting credit card payments along with capturing the customer's signature and generating a signed PDF form with the date and time stamp are now more popular than ever!

DP/DashBoard/CRM is not about a single solution. It is a "**collage**" of solutions facing a company in everyday life. This includes very complex issues like "**Customer Complaints**" and how to deal with them to the very simple things in a company like the assimilation of a company's "**Phone List.**" This may not sound very significant until you interview enough companies and find out how hard it is for the average company to keep an updated phone list going.

With employee turnover and new hires happening at most organizations on a regular basis, this can keep a good "**Executive Secretary**" busy in both large and small firms. However, delays in keeping this list up to date can cause confusion and frustrate new hires and existing staff alike. That's why a simple feature that allows firms to "**dynamically**" generate this list whenever an employee is added or deleted from the system is quite convenient.

Is it the only reason a firm would buy this product? Probably not! However, many companies with several locations and hundreds of employees may have a daunting task of keeping everyone up to date with who is currently on staff, where they are located and how to get a hold of them. The **DP/DashBoard/CRM** system immediately solves this kind of problem. One location or sixteen, it doesn't matter. That is the kind of "**internal**" solution the **DP/DashBoard/CRM** system is designed to address for a company.

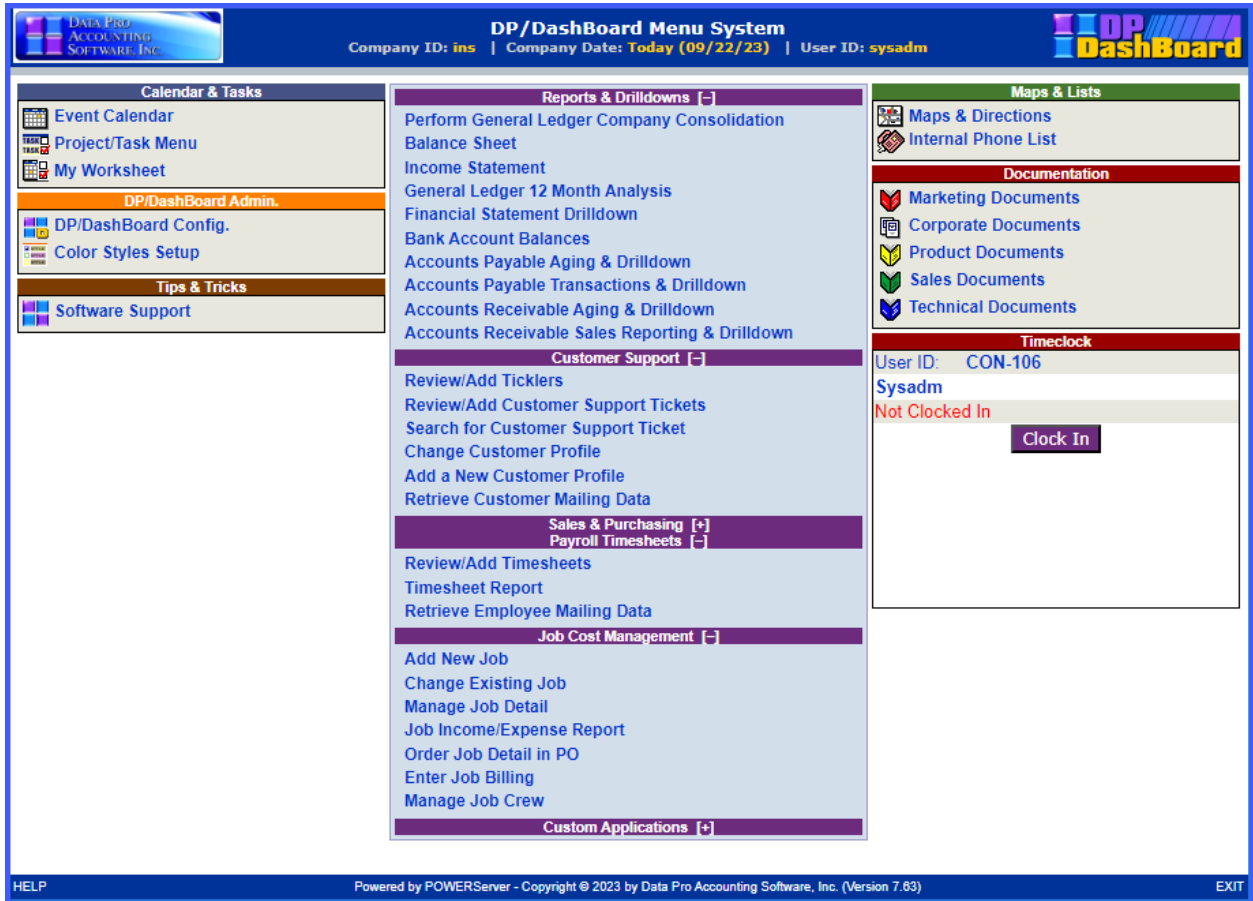
From there, the company then decides what is important to management and what is important to its employees. There are specific features designed for both groups of users.

That is why the variety of features are designed to work with the "**Advanced Security Administrator**" module that is included as standard feature with all versions of the **Infinity POWER** products.

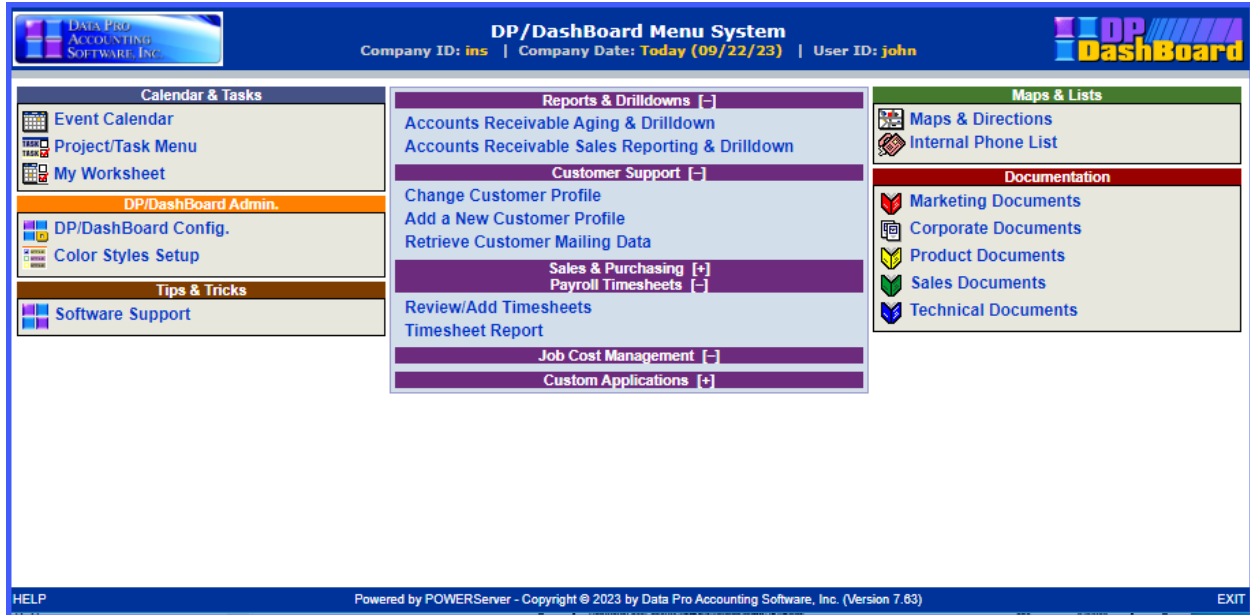
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By being able to deploy each feature with a “security” decision, management can choose on a “group by group” or “user by user” basis which features it wants seen throughout the company. As such, the menus are dynamically generated by the software to reflect only what is chosen by management for those groups or specific users accordingly.

This is an ideal solution since it may be possible that only the President, Vice President and Chief Financial Officer are allowed to see the Financial Statements (*such as the Balance Sheet and Income Statement*). Therefore, on a security level, all other users would be blocked from viewing the company’s financial statements. With **DP/DashBoard/CRM** this is a standard feature. Based on the setup, only these three management users when they login would see a screen that may include all options.



Notice down the center of the screen how all of the financial statement options such as Balance Sheet, Income Statement, Financial Statement Drilldown and more are shown. Now, compare this with the following screen that you may see for a user in the **Accounts Receivable Department** who does not have the same access rights.



The list of menu options is greatly reduced. This is why upper management/ownership has to be involved from the beginning with a deployment of this product. Who and what needs to be identified and decided upon from the beginning as to what each user is going to be allowed to see and do throughout the system.

So far, we have just touched upon a few of the features included in the **DP/DashBoard/CRM** product. There is far more. This includes a company-wide calendaring system. You may say, *“I already use Microsoft Outlook or a product like Act!”* for your personal calendaring system. True. All are fine products for what they do. However, you must now look at a broader issue and that is the scheduling of people and corporate resources throughout the company (*not just yourself*) so that everyone may be engaged and work together.

DP/DashBoard/CRM provides such a capability. More importantly, it does it through a **“Browser-based”** technology so that it may easily be accessed from virtually anywhere in the world and not just on a single PC as would be the case on these previously stated products.

Therefore, if you intend to schedule a **“sales meeting”** next Thursday and need to invite thirty (**30**) people to the meeting, book a conference room and insure everyone is notified, the **DP/DashBoard/CRM** product is ideal for the task. It will automatically check for scheduling conflicts and send an e-mail to everyone notifying them of the scheduled meeting. Further, it will book the meeting on the central calendar and make it available for all to see who are eligible. This is not something an individual contact manager is very efficient at. And, it will e-mail an invite to these users which can add the invite to Outlook!

Likewise, for those companies in the service business (*air conditioning repair, plumbers, electricians, network management, etc.*), complete service departments can be setup and all of their scheduling by service technician can be managed through this tool. It transcends a wide variety of uses in all organizations. In fact, each user can keep their schedules on the system and in complete privacy as well! Therefore, when someone tries to invite them to a meeting or conference call for instance, it can notify them whether they are available or not automatically without having to say why. Full levels of security are available throughout.

DP/DashBoard/CRM also incorporates an advanced **“Project Management”** system that is useful for virtually any company. How many times have you found yourself trying to keep track of a project and wondering if the people you’ve assigned to the project were going to complete it, meet the deadline or had forgotten all about it?

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Wouldn't it be nice for Management to know that every department was keeping track of their assignments, regardless of their nature, and that Management had an ability to oversee these projects and more?

Does your company have a convenient way for all employees to see their "**Company Policy Manual?**" Is it up to date? Do you even have one? After much research, Data Pro found that the last question was one that many companies couldn't even answer "**yes**" to, much less the previous ones.

DP/DashBoard/CRM solves many of these **Human Resource Management** problems by providing an elaborate "**Document Control**" system that allows a wide range of groups and sub-categories that may be established throughout the **DP/DashBoard/CRM** system for the purposes of managing word processing documents, spreadsheets, PowerPoint presentations, Adobe Acrobat files, JPGs, GIFs, WAV files, and much more. Further, you can create "**links**" to your most commonly used web sites so that no one forgets where they need to go!

The objective is to allow each organization to create a central location where staff may always know they can find the latest and greatest source of a specific document, regardless of which department they may be in. For instance, that could be the **Policy Manual** for the company as mentioned earlier. Or, it could be a document related to filling out an insurance claim for worker's comp.

However, the **Sales Department** may have a wide range of **Product Literature** it wants available for the entire company so they may be easily faxed or sent via e-mail from everyone's desktop. If you were a large automotive dealership with multiple lines of cars that you deal with, it would not be uncommon to set up several different sections specific to each brand (*i.e. Nissan, Mercedes, Jaguar, Ford, Toyota and more*).

This way, the information would be instantly available to all of your staff by brand including all of the credit applications, financing documents, lien papers, mileage documents and more that may be required on each sales transaction.

Every business is different and that is why the **DP/DashBoard/CRM** product was designed the way it was. Flexibly! This includes options with almost everything, including all of the icons, having the ability to be changed by each company. And, don't forget to put a map with directions to each of your locations on your site so your staff, vendors and customers can easily find you! There's much more.

Finally, the **DP/DashBoard/CRM** is a beginning of your company's "**Intranet**" implementation, not an ending. The more you deploy the product you will probably find that you will want to do more. All Data Pro customers already have the technology that allows them to implement e-commerce over the web, if they desire.

DP/DashBoard/CRM is your beginning of your "**Internal**" implementation. The technology this product is based on allows you to continue to expand the number of options and features you want to add for years to come. Therefore, you will only be limited by your imagination as to the options that may be deployed for your firm.

If you need customized reports, specific web options, custom order processing, time sheet entry for **Payroll** and **Job Costing** purposes and more, this is all possible and with a high level of creativity to be had. Don't forget that like all **Infinity POWER** products, **DP/DashBoard/CRM** allows for multi-company processing. Therefore, it is not uncommon to implement this product several times on the same server to support multiple companies and multiple sets of financial statements.

Or, you may install the system once and consolidate all financial statements. The method in which you choose will be based on the goals you seek and will be discussed later in this manual so that you may make an informed decision as to what is right for your firm(s). The key is that you have the choice.

Welcome to a new way of managing a company with **DP/DashBoard/CRM!**

ABOUT THIS MANUAL

This manual includes three chapters and three appendices. The following table describes the organization of the manual.

Section in Manual	What You Will Find
Chapter 1	<p>Introduction</p> <p>Introduces the conventions used in this manual and an overview of the DP/DashBoard/CRM product.</p>
Chapter 2	<p>Installation</p> <p>Explains the step-by-step installation procedures for the DP/DashBoard/CRM product.</p>
Chapter 3	<p>Using DP/DashBoard/CRM</p> <p>Explains how to configure DP/DashBoard/CRM and how to use its features.</p>
Chapter 4	<p>DP/DashBoard/CRM Troubleshooting Guide</p> <p>This troubleshooting guide is designed to help the user find solutions to common problems concerning the installation and configuration of this software and its related products.</p>
Chapter 5	<p>Acronyms</p> <p>Defines acronyms used in this manual.</p>

Please refer to the *Data Dictionary Reference Manual* in your *System Administrator User Manual* for a description of the files, fields, and indexes used through the **Infinity POWER** Accounting System as well as the E-Commerce and **DP/DashBoard/CRM** products.

<Click> here to access the *Data Dictionary Reference Manual in PDF format*.

<Click> here to access the on-line *Data Dictionary Reference Manual*.

Please refer to the *Security Objects Definitions Reference Manual* in your *System Administrator User Manual* for a listing of security objects by module and their definitions.

<Click> to access the **Security Objects Definitions Reference Manual** in PDF format.

<Click> to access the on-line **Security Objects Definitions Reference Manual**.

CONVENTIONS USED IN THIS MANUAL

It is important to understand the conventions used in this manual. The following table describes text and formatting conventions.

Convention/Term	Type of Information
Component Name	Name of a specific item on the screen such as pull-down menus, buttons, text boxes, etc. Example: Enter the login name in the User Name: text box.
<i>Filename</i> or <i>Directory Location</i>	Indicates a specific filename such as <i>install.exe</i> or a directory location such as <i>C:\Apps\power</i> .
<u>NOTE</u>	Indicates information for notes, cautions, warnings or important information. Be sure to read these when they appear. <u>NOTE</u> This is an example of an important note.
>	Used to show the hierarchy of either menu options or cascading screens. Example: From your desktop, <click> the Start button and select the Settings>Control Panel menu option.
“ ”	In a procedure, quotations denote text that should be typed exactly as displayed within the quotations or an exact response to a command. Used for emphasis if used in a paragraph. Example: From the command prompt, type “ exit. ”
< >	Denotes an action to be performed using the computer mouse (e.g. <Click> the Save button.)

DP/DASHBOARD/CRM REQUIREMENTS

DP/DashBoard/CRM must be installed on a **Microsoft Windows Server (2022, 2019,2016 or 2012), Windows 11, 10, Windows 8 or Windows 7** with Microsoft Internet Information Server (**IIS**) installed. All users accessing the **DP/DashBoard/CRM** system are required to have a current version of **Google Chrome, Mozilla Firefox, EDGE, or Apple 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, Portable Users such as Tablet and Laptop Users*), it is recommended 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**. This would include having field users with iPads and Tablets.

INFINITY POWER 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 purchased and/or installed.

Below is a complete listing of the current modules that are necessary for all **DP/DashBoard/CRM** features to be accessible:

Module	Part Number	DP/DashBoard/CRM Features
System Administrator (SA)	#100 – Standard Version #695 – Client/Server SQL Version	Includes the required POWERServer, Advanced Security Administrator module, Forms Generator, Menu Editing Tool, POWER Upgrade Utility, Data Dictionary, and Security Objects Definitions.
General Ledger (GL)	#101	Required for Balance/Sheet Income Statement/ Consolidation and General Ledger Drilldown features.
Accounts Payable (AP)	#102	Required for Accounts Payable Agings, Transaction Reports with Drilldowns.
Purchase Order Entry (PO)	#103	Required 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 (AR)	#104	Required for Accounts Receivable Drilldowns, Agings, and Transaction Reports. The Accounts Receivable module is also required to use the Customer Support Management module that is included with the DP/DashBoard/CRM product. This is required for the Add/Change customer Setup Options and Support Tickler and Support Tickets.
Inventory Management (IM)	#105	Required for Inventory Item Inquiry, Sales Order, and Purchase Order options.
Sales Order Entry (SO)	#106	Required for Sales & Purchasing options such as Add New Sales Order and View Existing Sales Order. Must have Accounts Receivable module for all Sales Order functions to be available.
Payroll (PR)	#108	Required for Payroll Timesheets options. Must also have Time Sheet Entry module for all Payroll Timesheets functions to be available.
Check Reconciliation (CR)	#270	Required for Bank Statement Drill-down features.
Time Sheet Entry (TE)	#271	Required for Payroll Timesheets options. Must also have Payroll module for all Payroll Timesheets functions to be available.
Customer Support Management (SD)	#275	Required for Customer Support options.
DP/AUTO Event Triggering System	#450	If you have integrated the DP/AUTO product, the “ Calendar Alerts ” script will send an email notification of upcoming calendar events scheduled in DP/DashBoard/CRM and the “ Calendar Worksheet ” script will email a daily worksheet of calendar events and pending tasks.

Infinity POWER with the **POWERServer** module may be installed on any of the currently supported operating systems such as **Microsoft Windows (11, 10, 8, or 7)** or **Windows Server (2022, 2019, 2016, or 2012)**. The **Infinity POWER** accounting system can be installed with any of our supported databases that include support for **FoxPro, dBase, Microsoft SQL Server 2019, 2016, 2014, or 2012**. All networks must support a **TCP/IP** based network protocol.

CHAPTER 2 INSTALLATION PROCEDURES

This chapter describes the installation procedures and configuration settings that are necessary for the **DP/DashBoard/CRM** system to operate properly. The subsequent sections contain procedures that **MUST** be performed in the order in which they appear.

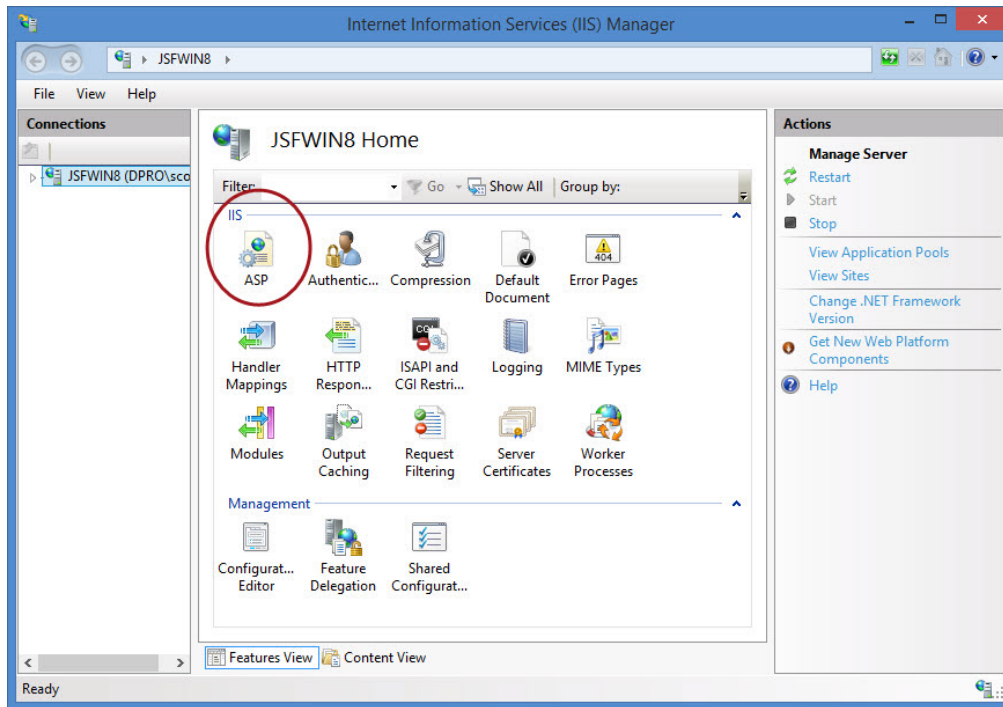
NOTE

You must install or upgrade to **Infinity POWER Version 7.50** **BEFORE** you install **DP/DashBoard/CRM Version 7.63**.

INSTALL MICROSOFT INFORMATION SERVER (IIS)

The **DP/DashBoard/CRM** system is designed to specifically take advantage of the Microsoft Information Server (**IIS**) which is available on all Windows operating systems such as **Windows 11, 10, 8** or **7** and **Windows Server 2022, 2019, 2016, or 2012**. You will find, however, that during most installation procedures the **IIS** portion of the Windows operating system is **NOT** installed by “**default.**” Unless it has been specifically installed by the System Administrator setting up your PC or Server during the installation of the operating system, then, you need to ask your **IT Manager** or **IT Firm** to specifically install these features for you before you proceed with installing the **DP/DashBoard/CRM** product.

The interface differences are significant between installing the **IIS** on a PC Workstation (**Windows 11, 10, 8** or **7**) verses activating the **IIS** on a **Windows Server (2022, 2019, 2016, or 2012)**. Therefore, Data Pro technical staff or your IT person are responsible for ensuring that the **IIS** is installed and functioning before proceeding. However, when you contact them, make sure to ask them to insure to install the “**ASP**” features of the **IIS** Server.



WARNING

It is not recommended by Data Pro that you add the File Transfer Protocol (FTP) Service subcomponent to your system unless you have other specific reasons outside of the scope of **DP/DashBoard/CRM**. The **DP/DashBoard/CRM** system does not utilize the FTP features and this feature could create a potential security breach, if not implemented properly. Therefore, make sure you fully understand the ramifications of adding any of these additional components before you select them. The default listing you see above is acceptable for installation, although the **DP/DashBoard/CRM** system only requires the “**Common Files**,” “**SMTP Service**,” and “**World Wide Web Service**” at a minimum to run the product.

IMPORTANT

There are two key issues with IP Addresses you must be aware of depending on how the **DP/DashBoard/CRM** system is going to be accessed and configured. First and foremost, inside your internal network and on your server or PC that is running the Microsoft IIS server, you must have a fixed “**IP Address**” or the **Microsoft IIS Server** will not operate correctly. This means you must pre-assign a “**fixed IP Address**” to this specific server or PC and cannot use the Dynamic Host Configuration Protocol (**DHCP**) feature that is common within many network configurations, which allows for a dynamic assignment of IP Addresses.

For many companies using **DP/DashBoard/CRM**, this will be the only issue they need to worry about. However, if the business intends to allow any remote access for its owners and/or employees from outside the internal network, then you must assign a fixed IP Address to the server’s web address so that all remote users know where to go each time they want to login. Otherwise, this could become a moving target if you allow your Internet Service Provider (**ISP**) to dynamically and periodically assign you different IP Addresses.

All systems using **DP/DashBoard/CRM** must have a broadband connection to the Internet or a local area network to support the minimum transfer of graphics and access. This means you will need an Internet access provider providing high speed access (*i.e. T-1, fiber or cable modem*) for the **DP/DashBoard/CRM** system to work correctly. Do not assume that your provider is automatically providing you a fixed IP Address connection (*also known as a Static IP Address*)! You need to specifically request one!!!

Again, this outside connection is only required if you want to make the **DP/DashBoard/CRM** system available to users who are accessing the system from “**outside**” your internal network. Remember, you may need to configure firewall access and should consider setting up Virtual Private Network (**VPN**) access to limit any other users from getting into your private network.

If you do allow users from the outside of your internal network to access your **DP/DashBoard/CRM**, then it is mandatory that you add an “**SSL Certificate**” to your **IIS server** so that you are not passing clear data over the network which isn’t encrypted. You can easily order these certificates from Domain providers, such as **Go Daddy** or **Network Solutions**.

This would be particularly true for those companies with **Branch Locations** and/or those who firms who intend to allow some of their staff to access their **DP/DashBoard/CRM** system via the use of a tablet device or laptop PC. For Sales and Service organizations, this has become a very common use of the **DP/DashBoard/CRM** product, particularly with the advanced use of the Sales Order Entry, Customer Inquiry and Inventory Inquiry functions of the **DP/DashBoard/CRM**.

INSTALL OR UPGRADE INFINITY POWER AND RELATED PRODUCTS

If your **Infinity POWER** accounting modules are already installed on your PC or accounting server, you must ensure that the **POWERServer** application is configured and running prior to installing the **DP/DashBoard/CRM** software. Otherwise, it will not communicate to your accounting software data. Since the **DP/DashBoard/CRM** product is designed to also integrate with a wide range of **Infinity POWER** accounting software products, you must also ensure that they are installed and the data files for each of these modules are created prior to installing the **DP/DashBoard/CRM**.

To Install or Upgrade Infinity POWER and Related Products:

To Install the **Infinity POWER** modules, including the **POWERServer** application and other accounting modules (refer to the **Infinity POWER Installation Guide** for installation instructions).

Either version of the **System Administrator** module (P/N #100 or P/N #695) **MUST** be installed, at a minimum, to ensure that the **Advanced Security Administrator** module and the **POWERServer** modules are implemented. These modules are “**mandatory**” for the **DP/DashBoard/CRM** system to operate.

The **DP/DashBoard/CRM** system does require that your internal network system be configured for the **TCP/IP** networking protocol. The **DP/DashBoard/CRM** system includes the **Infinity POWER Customer Support Management (CSM)** module (P/N #275) at no additional charge. This module **DOES** require the **Accounts Receivable** module (P/N #104) for full implementation. Therefore, if you intend to fully deploy the **CSM** features within the **DP/DashBoard/CRM** system that are supported by this product, you must have the **Accounts Receivable** module installed as well.

As mentioned in the previous requirements section in **Chapter 1**, if you intend to utilize the various features such as the Financial Reporting capabilities (*i.e. Balance Sheet, Income Statement*), you must also have the **General Ledger** module (P/N 101) installed and configured. Or, if you want to be able to access the **Accounts Payable** transaction reports, Accounts Payable Aging Reports and Drilldowns, you must have the **Accounts Payable** module.

All of these modules **MUST** exist in the **Infinity POWER** accounting system for them to appear and be accessible in the **DP/DashBoard/CRM** system. There is a direct correlation between the existence/setup of these products and the availability of these products within **DP/DashBoard/CRM**.

Remember, the **DP/DashBoard/CRM** system has a broader management use and is not always intended to replace the daily transaction processing flow of the normal accounting software. For example, the printing of checks in **Accounts Payable** is going to continue to be done from the **Accounts Payable** module (P/N 102), not the **DP/DashBoard/CRM** system. The printing of Invoices is done in the Accounts Receivable and Sales Order Entry modules.

However, with the **DP/DashBoard/CRM** system, users can easily use the “**drilldown**” feature during a “**Customer Inquiry**” and specifically select an invoice that has already been generated through the **Infinity POWER** accounting modules and have the **DP/DashBoard/CRM** software “**render**” it as an original Invoice again and provide it to the user in a **PDF** document, which can then be printed, viewed, e-mailed or faxed right from the user’s desktop or tablet device.

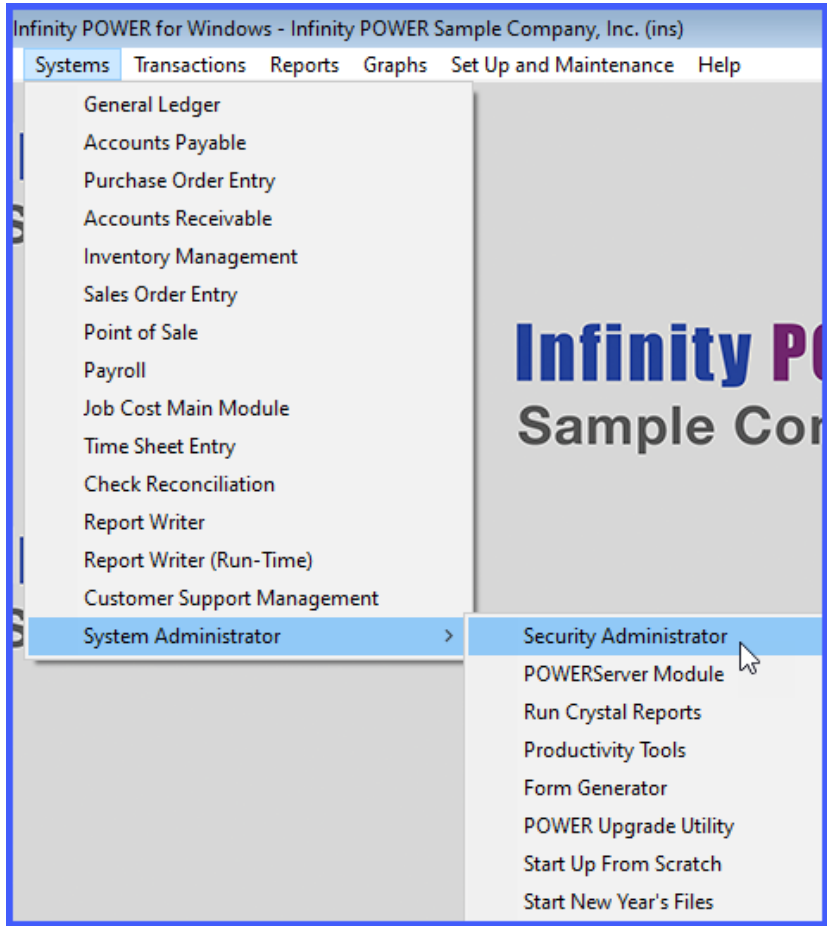
CONFIGURE SECURITY SYSTEM OBJECTS

“**Security Objects**” from the **Advanced Security Administrator** module are used by the **DP/DashBoard/CRM** options to control which users have access to each specific menu option. These security objects are a standard function found within either version of the System Administrator module.

NOTE

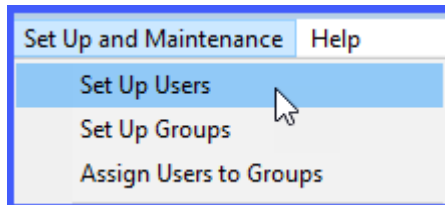
The **DP/DashBoard/CRM** security objects are defined in the Security Objects Definitions Reference Manual found in your System Administrator User Manual.

To configure **Security Objects**, you would go to the **System Administrator** module and then choose the **Security Administrator** option as shown on the following screen.



When installing the **Infinity POWER** products, **Advanced Security** **MUST** be selected rather than **Standard Security** in order to fully deploy **DP/DashBoard/CRM**. If **Standard Security** was selected, the products can be reinstalled by running the installation utility “**Winstall**” that will allow you to reselect the type of security mechanism to use for your installation of the **Infinity POWER** applications. The “**Winstall**” utility will be found in the program directory where you installed the accounting software applications.

Once you have loaded the **Advanced Security Administrator**, under the “**Set Up and Maintenance**” menu, there are two choices for setting up Users and Groups. These two options allow you to define which specific “**Security Object**” can be assigned to a specific user or a group of users. In other words, this controls what each user or group of users will see when they access the **DP/DashBoard/CRM** program.



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Therefore, let's look at two screens within the same **DP/DashBoard/CRM**. The following screen is the “**default**” opening screen you would see if you had **ALL** rights to everything that is currently available. This would be equal to logging into the **DP/DashBoard/CRM** as the **SYSADM** user.

The screenshot displays the DP/DashBoard Menu System interface. The header includes the company name 'Data Pro Accounting Software, Inc.', the system title 'DP/DashBoard Menu System', and user information: 'Company ID: ins', 'Company Date: Today (09/22/23)', and 'User ID: sysadm'. The main menu is organized into several sections:

- Calendar & Tasks:** Event Calendar, Project/Task Menu, My Worksheet.
- DP/DashBoard Admin.:** DP/DashBoard Config., Color Styles Setup.
- Tips & Tricks:** Software Support.
- Reports & Drilldowns [-]:** Perform General Ledger Company Consolidation, Balance Sheet, Income Statement, General Ledger 12 Month Analysis, Financial Statement Drilldown, Bank Account Balances, Accounts Payable Aging & Drilldown, Accounts Payable Transactions & Drilldown, Accounts Receivable Aging & Drilldown, Accounts Receivable Sales Reporting & Drilldown.
- Customer Support [-]:** Review/Add Ticklers, Review/Add Customer Support Tickets, Search for Customer Support Ticket, Change Customer Profile, Add a New Customer Profile, Retrieve Customer Mailing Data.
- Sales & Purchasing [+]:** Payroll Timesheets [-], Review/Add Timesheets, Timesheet Report, Retrieve Employee Mailing Data.
- Job Cost Management [-]:** Add New Job, Change Existing Job, Manage Job Detail, Job Income/Expense Report, Order Job Detail in PO, Enter Job Billing, Manage Job Crew.
- Custom Applications [+]**
- Maps & Lists:** Maps & Directions, Internal Phone List.
- Documentation:** Marketing Documents, Corporate Documents, Product Documents, Sales Documents, Technical Documents.
- Timeclock:** User ID: CON-106, Sysadm, Not Clocked In, Clock In button.

The footer contains 'HELP', 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.03)', and 'EXIT'.

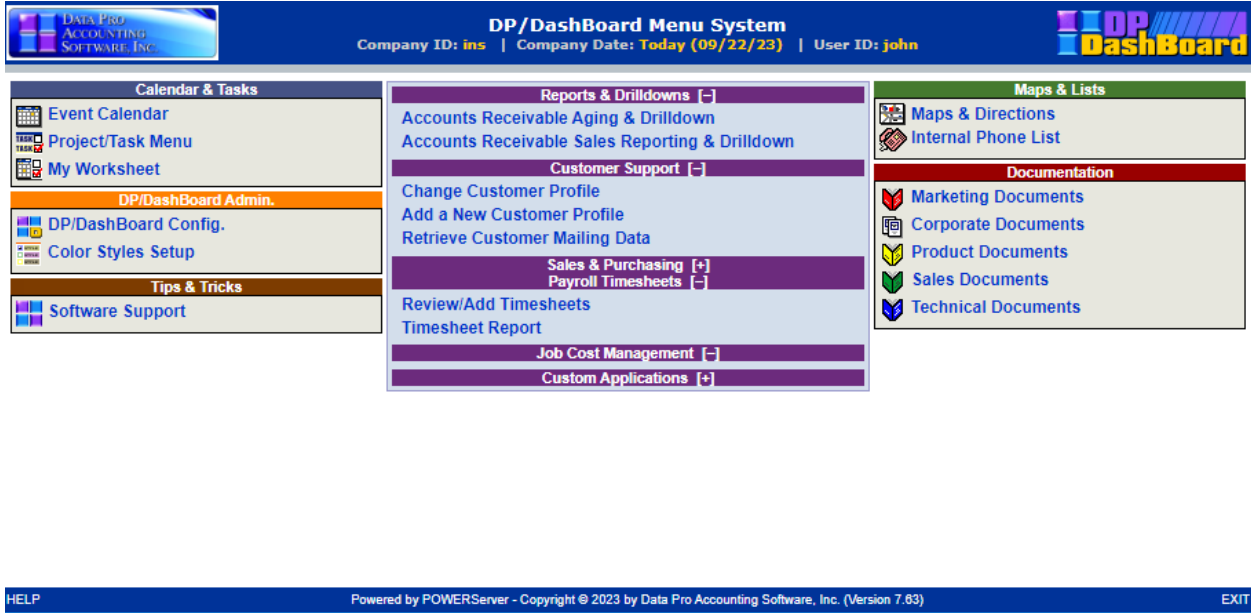
Notice that there is a long menu listing of options from a wide variety of accounting applications. This ranges from everything that includes the **General Ledger** module, to **Accounts Payable**, **Accounts Receivable**, **Check Reconciliation**, **Customer Support Management**, **Sales Order Entry**, **Inventory Management**, **Time Sheet Entry**, **Job Costing** and more.

If you are the owner of the company, or one of the members of the **Executive Management** team, this may be perfectly fine for you to have full rights to see everything. However, it is highly unlikely that if you had a team of plumbers, electricians or sales people in the field, that you would want them to have full access to all of the important data that all of these key accounting modules possess.

You certainly wouldn't want to publish your **Balance Sheet** and **Income Statement** to them or allow them to “**drill down**” to the cash balances with your checking accounts! Therefore, you would start using the **Advanced Security Administrator** module to create user and group rights so that they only see what you want them to see.

For instance, if you had a group of users that you only wanted to provide rights to see options within the **Accounts Receivable** module on the **DP/DashBoard/CRM** then you would find that when they login, their menu would look significantly different than the previous screen.

DP/DashBoard/CRM User Manual



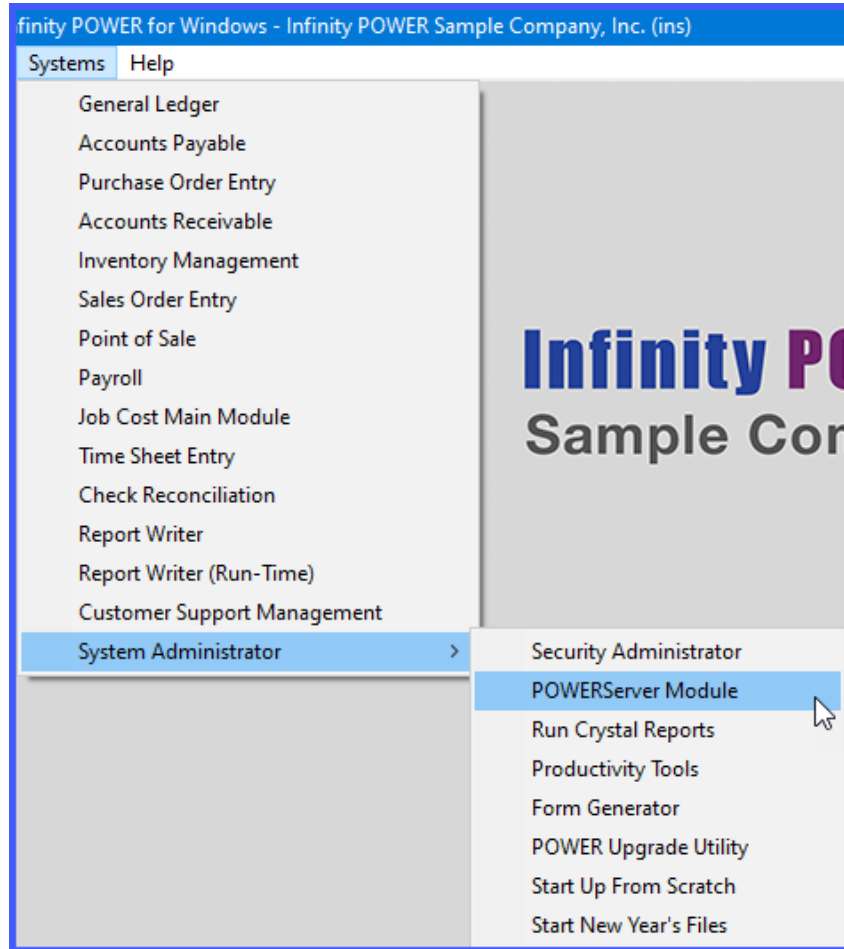
You can learn more details about defining security rights, by user and by user groups, in the **Advanced Security Administrator** module user manual. However, the previous example gives you an idea how much control you have over what your users and groups can see or not within the **DP/DashBoard/CRM** menu system.

Plus, that would also include any new “**Custom**” programming options that may be added specifically for your business. Because the **DP/DashBoard/CRM** product is a “**web-based**” application, it is common for **Data Pro Accounting Software** to create custom modifications to the **DP/DashBoard/CRM** product for customers to allow the product to solve industry specific needs, without every actually modifying the actual “**source code**” within the accounting software modules.

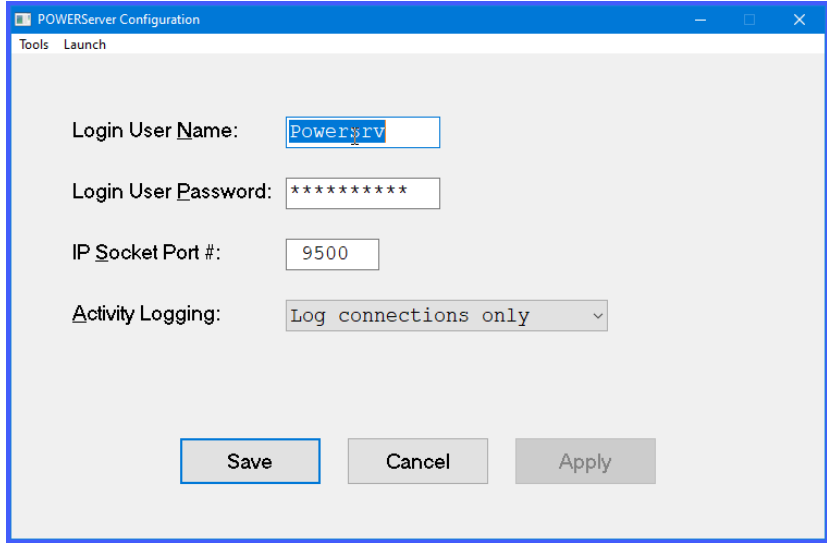
What this means for you is that you are never locked into a single version of the product. As new software releases come out, because the **DP/DashBoard/CRM** is using the **POWERServer** to communicate to the accounting programs data files, no re-application of customization changes ever have to be made to **DP/DashBoard/CRM**.

POWERSERVER CONFIGURATION

The **POWERServer** may be accessed from the “**Systems**” menu as shown on the following screen:



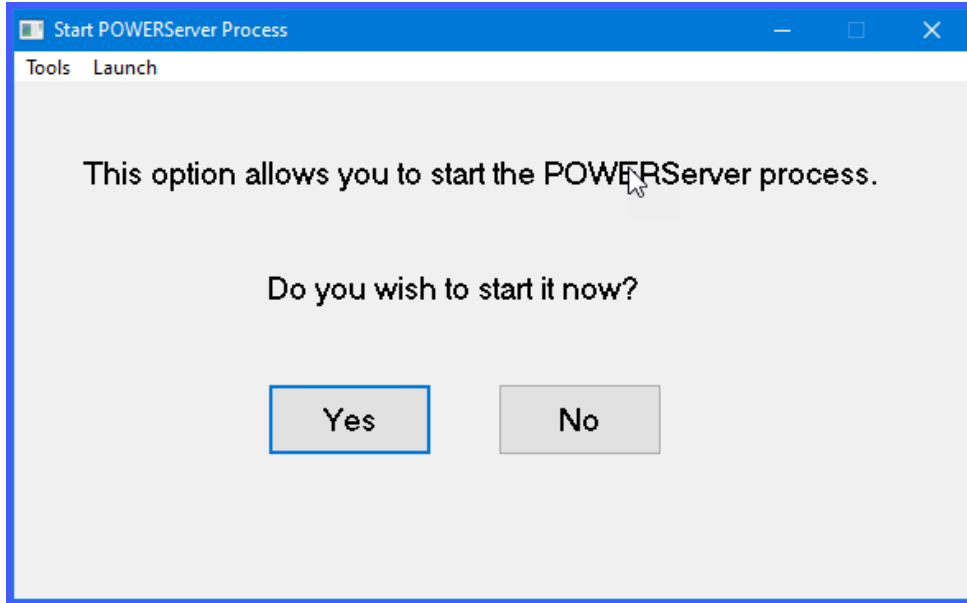
Once you select the **POWERServer Module**, there are four data items that need to be set up for the **POWERServer Configuration**.



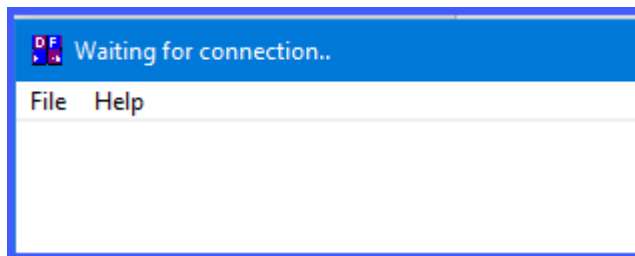
<p>Login User Name</p>	<p>The Login User Name is the User ID set up in the Advanced Security Administrator module for the specific user to be called to communicate between the client and the POWERServer. “Web” is a common User ID used for defining web servers and other automated communications.</p>
<p>Login User password</p>	<p>The Login User Password is the password that was assigned to the specific User ID in the Advanced Security Administrator that corresponds with the Login User Name.</p>
<p>IP Socket Port</p>	<p>The IP Socket Port is the port number that is defined to use to communicate through the TCP/IP protocol. This port number should match the port number, used by the client application when initializing the TCP/IP connection to the POWERServer. Commonly, Port 9500 is used by Data Pro applications.</p>
<p>Activity Logging</p>	<p>The POWERServer module can create a log file, which contains information about user logins and their activity (<i>requests and responses made to and from the POWERServer</i>). There are three choices for logging the POWERServer activity.</p> <ul style="list-style-type: none"> • Disable Log • Log Connections Only • Log All Activity <p>NOTE: When you choose to log “All Activity” the POWERServer log file can become very large in size. It is suggested that this should only be done during a testing or debugging phase of the client application.</p>

START POWERSERVER PROCESS

Once the configuration section is completed and saved you may then start the **POWERServer** process. The system will display a box on your screen and ask “**Do you wish to start it now?**” Click on the “**Yes**” button and a new application window will appear on your desktop.



This window must be kept open as it is waiting to receive requests from the client. That is why it is generally better to set up **POWERServer** as a “**Windows Service,**” which allows it to run in the background all of the time, even if you should have to reboot your computer.

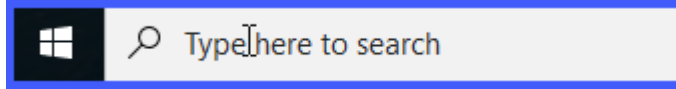


SETUP POWERSERVER AS A WIN32 SERVICE

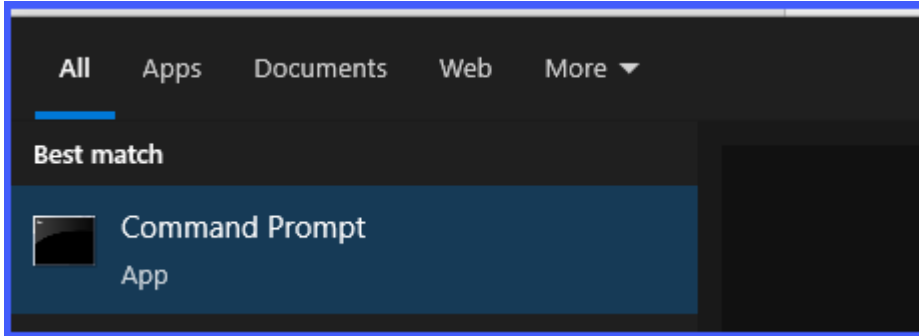
One of the servers or workstations on your network must now be chosen as the **POWERServer** “**server.**” This is the server that runs the **POWERServer** process in the background, listening for connection requests from the client application (*like DP/AUDITOR*) and then accessing the accounting system. It is recommended that you choose the same network server that the accounting system is installed on.

SETTING UP POWERSERVICE:

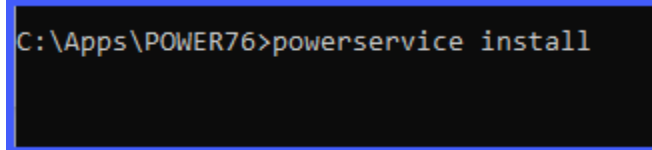
1. From the **Accounting Server**, <click> **“Type Here to Search”** from your desktop as shown below.



Or



2. Type **“cmd”** in the **Open** text box. Right click on the cmd.exe application and choose **“Run as administrator.”**
3. Press **ENTER** and the **“Command Prompt”** window displays.



4. Change the directory to where the accounting system is installed (**i.e. *cd c:\apps\power***). The prompt changes to the accounting software directory.
5. From the command prompt in the accounting software directory, type **“POWERService install”** and press **Enter** on the keyboard.

This command installs the **POWERServer** module as a **Windows Service** which automatically starts whenever your server is turned on or rebooted.

6. Type **“exit”** and press **Enter** on the keyboard to close the command prompt window.

Before you Begin:

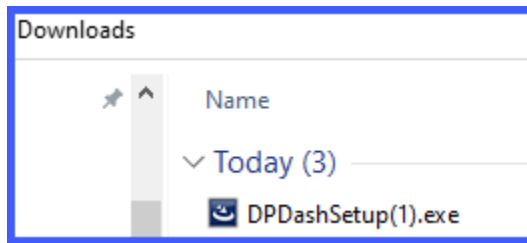
If you do not have the *DPDashSetup.exe* installation utility, you need to download it from the Data Pro website.

Make sure to download the **DP/DashBoard/CRM** from the Data Pro web site at:

www.dataproaccounting/download

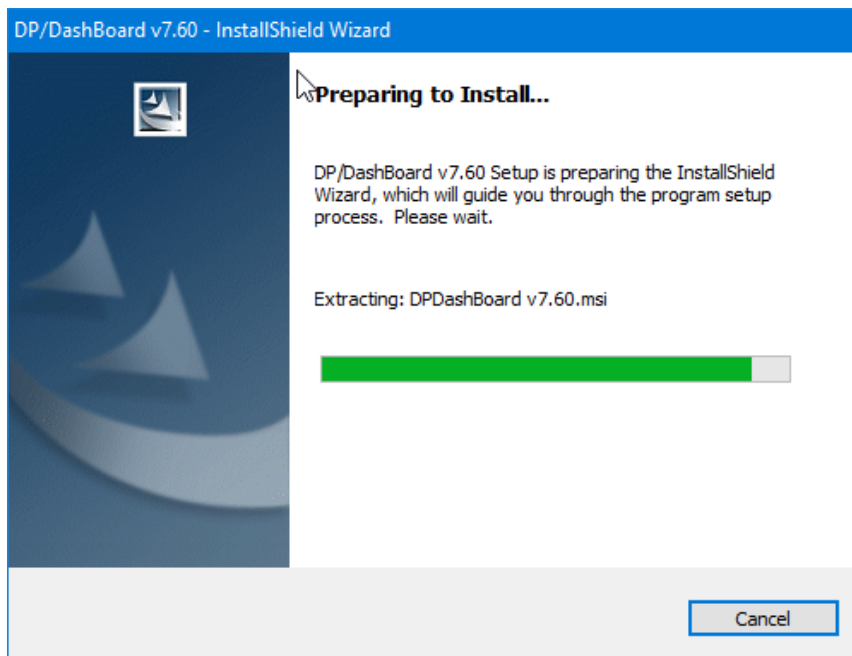


Then, go to your downloads folder and double click on the **DPDashSetup.exe** file to start the installation process.

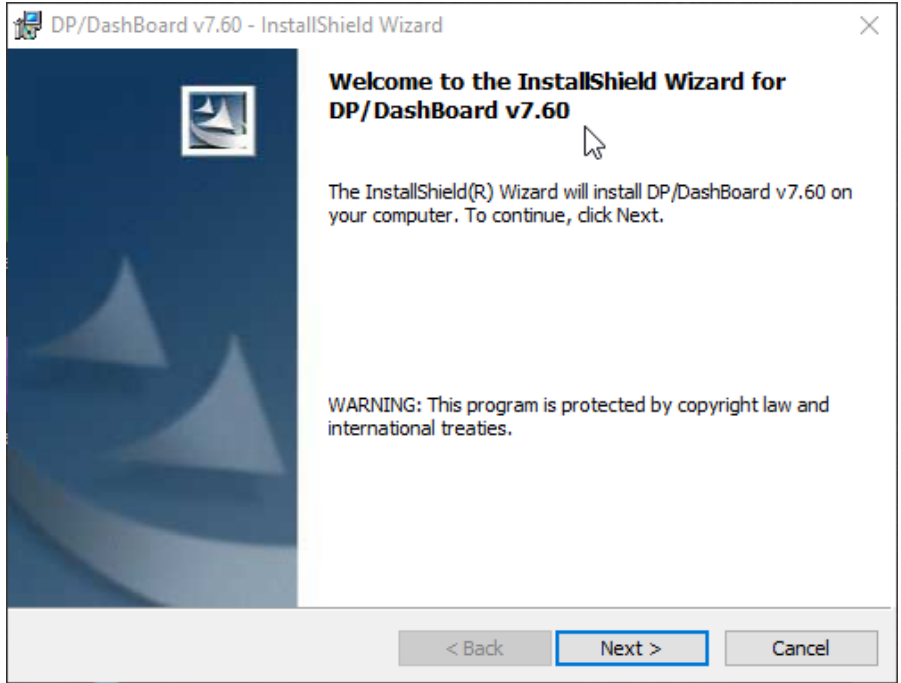


To Install DP/DashBoard/CRM on the IIS Server:

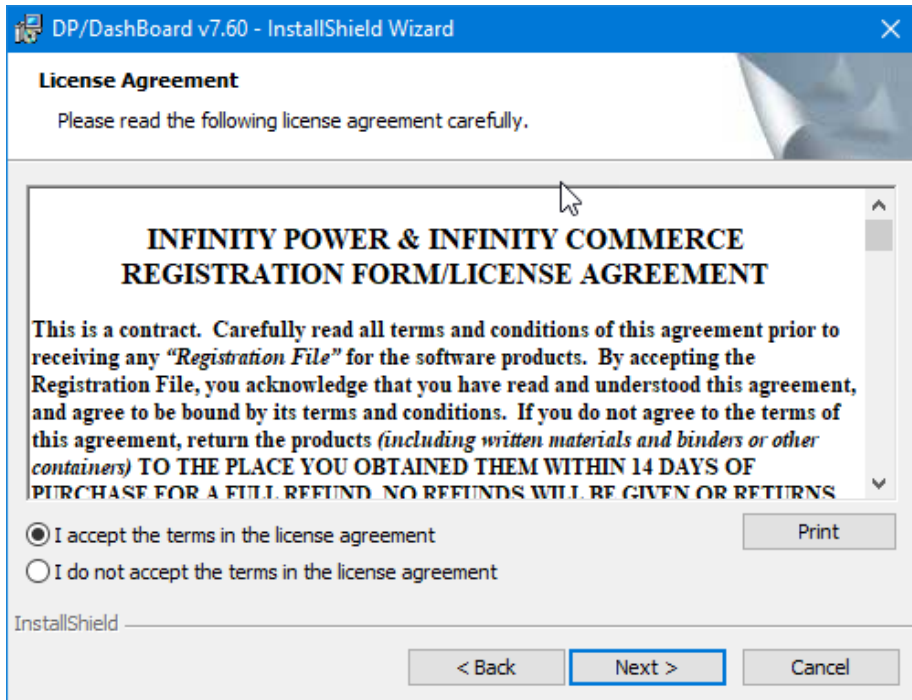
2.<Double-click> on the *DPDashSetup.exe* file to begin the installation. The InstallShield Wizard displays.



When the InstallShield completes the configuration, the **DP/DashBoard/CRM InstallShield Wizard – Welcome Window** displays.

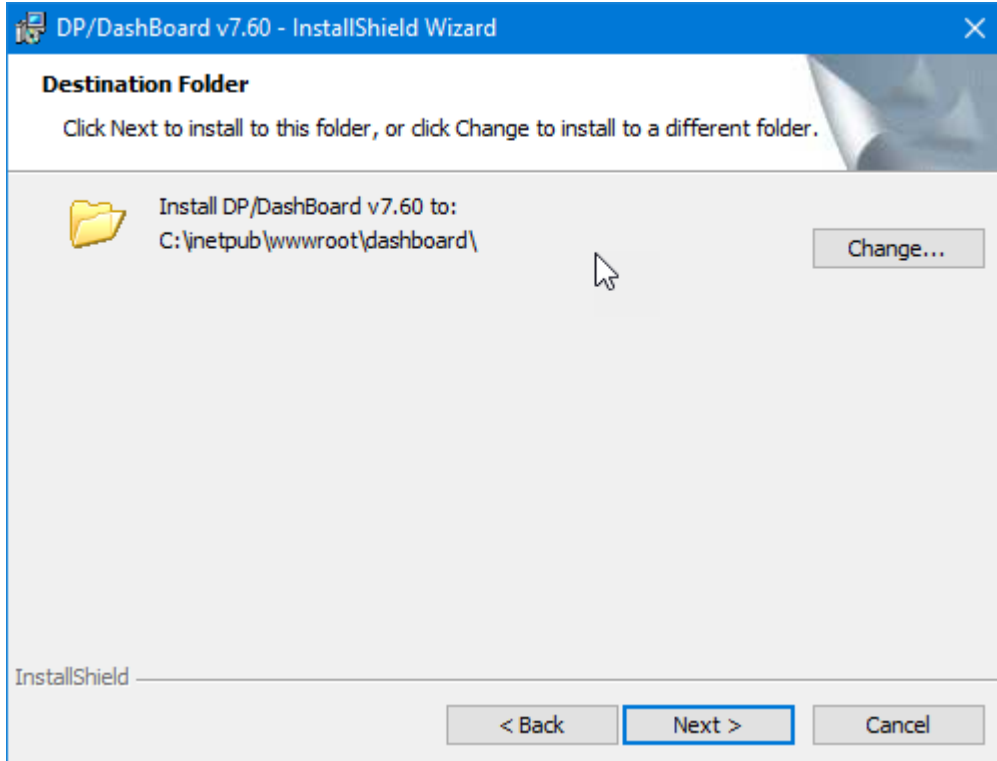


3. From the DP/DashBoard/CRM – InstallShield Wizard Welcome window, <click> the **Next >** button to proceed to the next step of the installation. The License Agreement window displays.



4. Make sure to read through the entire **Software License Agreement**. If you agree to accept the terms of the Software License Agreement, then click on the **I accept...** button and then click the **Next >** button to proceed with the next step of the installation.

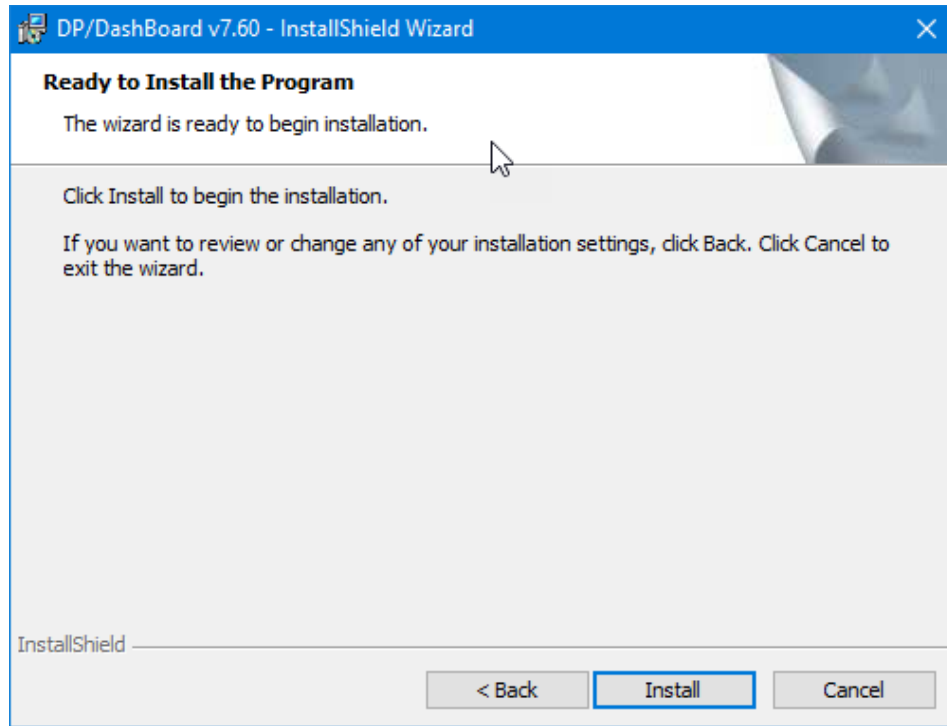
The Destination Folder window displays. This defines to the system where the program files will be loaded on your computer system



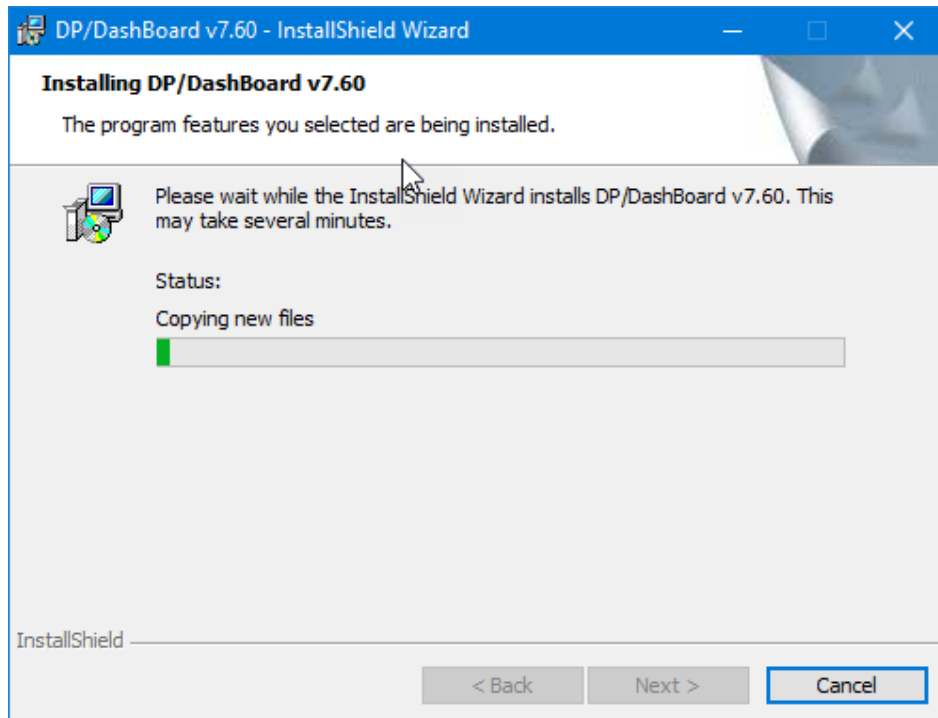
5. <Click> the **Next >** button to install the default folder. The Ready to Install the Program window displays.

NOTE

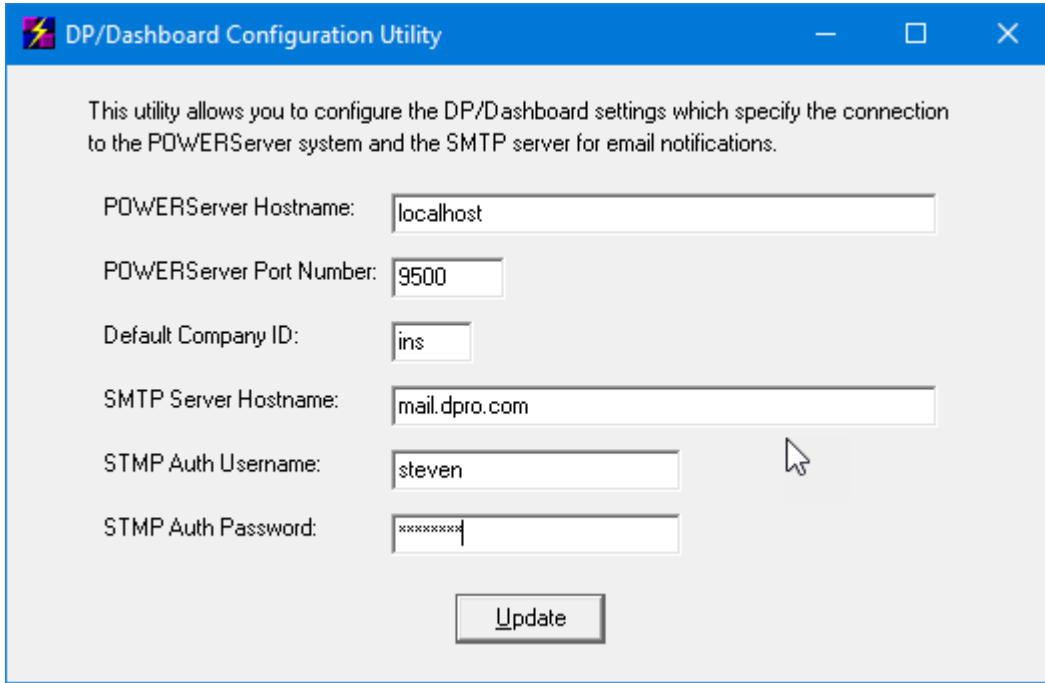
<Click> the **Change...** button to select a different folder other than the default. The default directory path is *c:\inetpub\dpdash*. The default web server directory in IIS is *c:\inetpub\wwwroot*. This default IIS directory may already have web pages installed in it or you may already have your own web pages installed there. You may choose to install in the default IIS directory or choose the **DP/DashBoard/CRM** installation default as shown above. In either case, you must configure the IIS web server to “**know**” where the **DP/DashBoard/CRM** files are installed.



6. <Click> the **Install** button to begin installing **DP/DashBoard/CRM**. The Installing DP/DashBoard/CRM window displays.



Once the **DP/DashBoard/CRM** installation utility has copied all of the files to your installation directory, the DP/DashBoard/CRM Configuration Utility window displays. This allows you to specify the connection parameters to your accounting server and the accounting files.



7. Enter the Hostname (or IP address) of the server on your network which is running the **POWERServer** process in the **POWERServer Hostname** text box.
8. Enter the IP port number that the **POWERServer** module has been configured to “listen on” in the **POWERServer Port Number** text box. This must be the same exact port that **POWERServer** is running on. The recommended port/channel is **9500**. The valid range is **1034** to **65000**.

NOTE

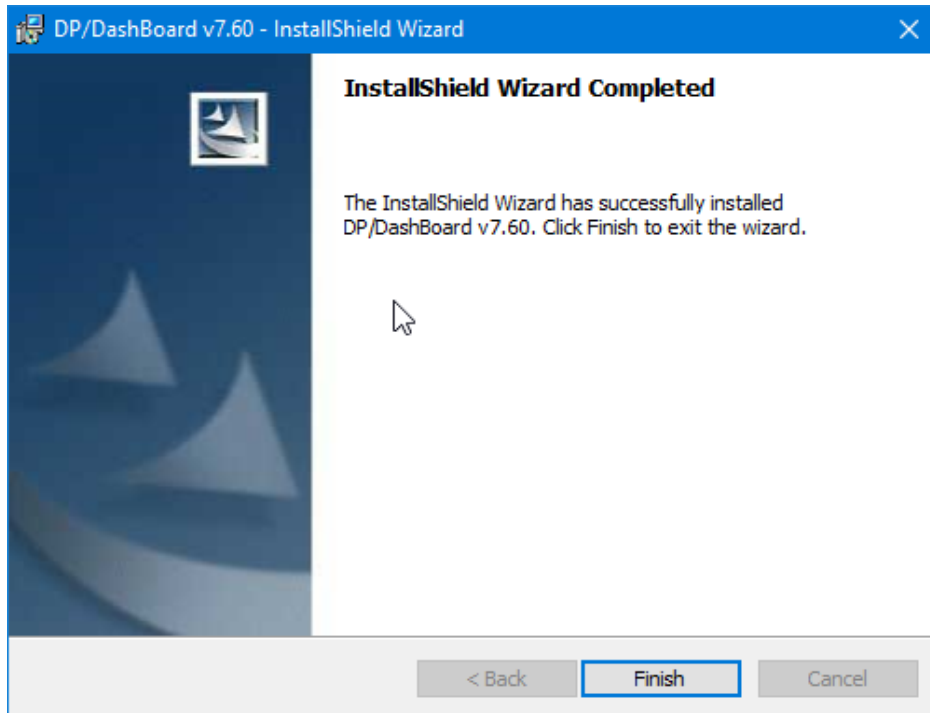
Entering a negative sign “-” before the **POWERServer Port Number** will encrypt all communication messages to the **POWERServer**. This security mode is necessary when you are using a third-party Internet Service Provider which is hosting your web site and the communication back to your accounting system is over the internet.

The communication between the **DP/DashBoard/CRM** system and the **POWERServer** using the TCP/IP port number defined here is normally in clear text message mode. This is normally not a security issue if the **DP/DashBoard/CRM** and the **POWERServer** are all running on servers within your internal network. If you are hosting the **DP/DashBoard/CRM** product on an IIS web server which is outside your internal network then the TCP/IP communication messages will most likely be sent over the internet.

In this case you should configure the TCP/IP communication system to use secured mode. Placing a negative sign (-) in front of the Port Number indicates to the system that all messages to and from the **POWERServer** should be encrypted. For example, instead of defining the Port Number to be “**9500**” set the port number to “**-9500**.” The TCP/IP communication will still use port **9500** but all messages to and from the **POWERServer** will be encrypted.

There are no **POWERServer** configuration changes necessary to switch modes. The **POWERServer** will automatically switch between secured and non-secured modes based on the configuration of **DP/DashBoard/CRM**.

9. Enter the default company that **DP/DashBoard/CRM** will be connected to in the **Default Company ID** text box. This is the three (3) character company number which is the identifier for all of a company's accounting data files (*i.e. Company INS = Infinity Sample Company*). The **DP/DashBoard/CRM** can be configured later to access multiple companies, but this specifies the "default" company each user will be accessing the first time they log in to the system.
10. Enter the appropriate server name in the **SMTP Server Hostname** text box. Enter the domain name or IP address of your SMTP mail server. If this hostname is defined, the **DP/DashBoard/CRM** application will send a notification email to all of the calendar event attendees when an event is added or rescheduled. A summary email will also be sent to the customer and/or vendor if they are referenced on the event. This customer and/or vendor email will not contain the comments, attendees, and resources of the event.
11. Enter the desired SMTP authorization name in the **SMTP Auth Username** text box. If the SMTP mail server defined above requires username/password authentication enter the username here.
12. Enter the desired SMTP authorization password in the **SMTP Auth Password** text box. the SMTP mail server defined above requires username/password authentication enter the password here.
13. <Click> the **Update** button to finish the installation process. The InstallShield Wizard Complete window displays.



14. <Click>the **Finish >** button to complete the installation of **DP/DashBoard/CRM**.

CONFIGURE THE IIS WEB SERVER

The Microsoft Information Server (IIS) must be configured to “know” where DP/DashBoard/CRM has been installed. Various versions of Windows show different steps. That’s why either a Data Pro technician or your IT professional should configure your IIS server based on your Windows operating system, whether it be on a local PC or a Windows Server.

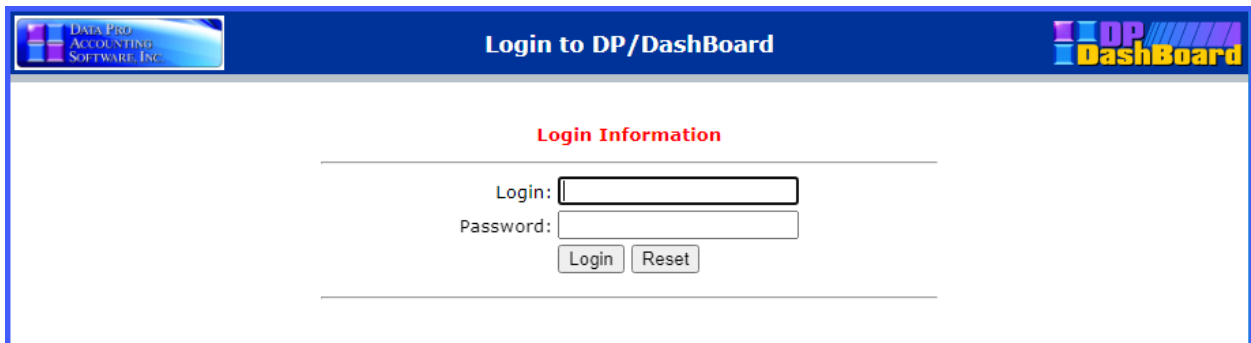
LAUNCH BROWSER AND ENTER URL OF DP/DASHBOARD/CRM SERVER

At this point, you are ready to configure DP/DashBoard/CRM and begin using it. Like the rest of the **Infinity POWER** accounting software product line, the DP/DashBoard/CRM system is controlled by the **Advanced Security Administrator** module. Users throughout the system only see what management decides that they should see, if anything at all. However, when you are in the setup phase, it is recommended that you login as the **SYSADM** user to ensure you have the security access necessary to completely configure the DP/DashBoard/CRM program.

It is also recommended that once the setup phase is complete, that you resort to another USER ID for day-to-day operation of the system. You may require full rights for some users, such as owners and upper-level managers, to allow them complete access to all DP/DashBoard/CRM options.

To Start DP/DashBoard/CRM:

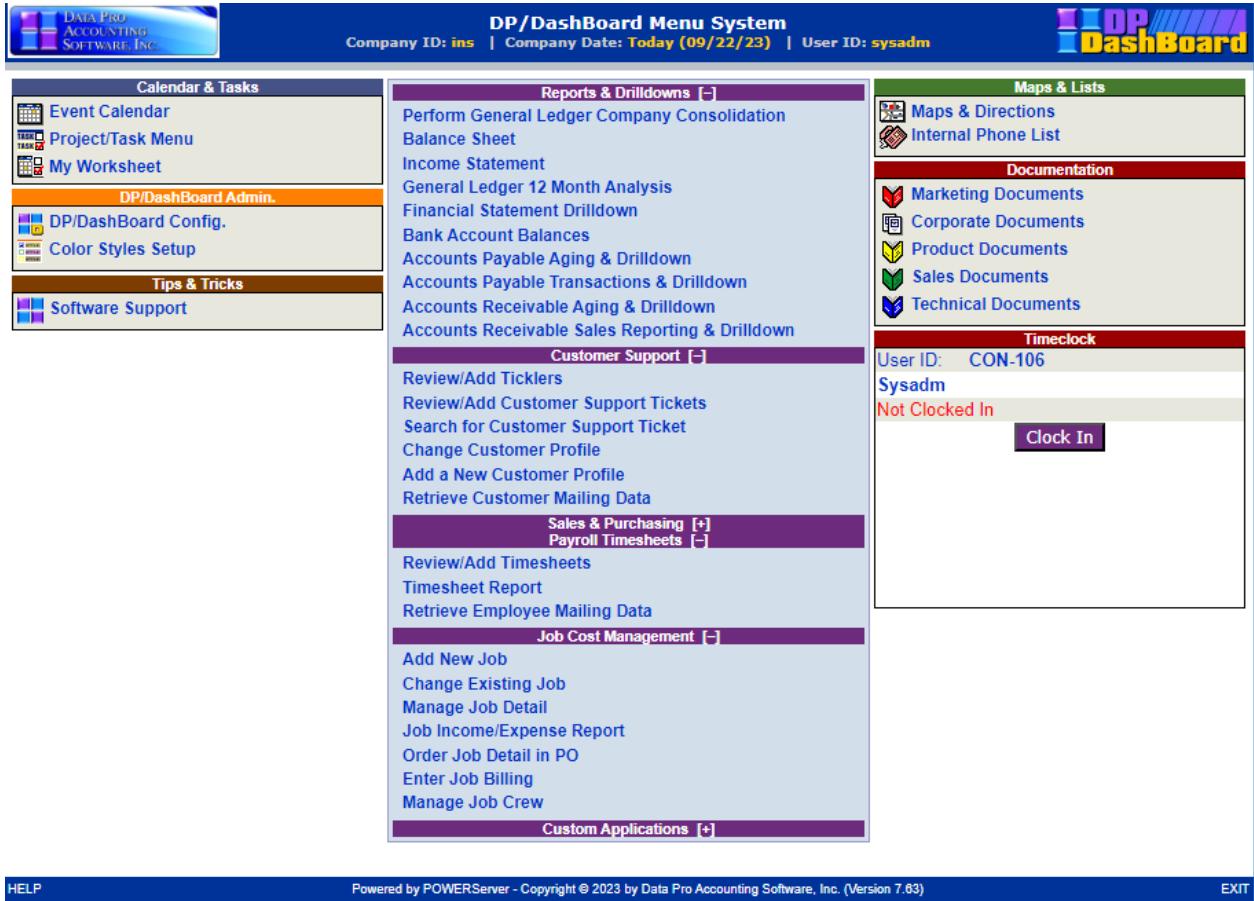
1. Launch a current version of the **CHROME, FIREFOX, EDGE or SAFARI** browser and enter the domain name (*i.e. <http://dpdashboard.dpro.com>*) or the **IP Address** (*i.e. 80.153.123.85*) of the web server machine that you have setup. This should load the initial login screen of the DP/DashBoard/CRM system.



The screenshot shows a web browser window with a blue header. On the left is the logo for Data Pro Accounting Software Inc. On the right is the DP DashBoard logo. The main title is "Login to DP/DashBoard". Below this, the text "Login Information" is displayed in red. There are two input fields: "Login:" and "Password:". Below the "Password:" field are two buttons: "Login" and "Reset".

2. Enter the user ID in the **Login** text box and the user password in the **Password** text box.
3. <Click> the **Login** button. The DP/DashBoard/CRM Menu System screen displays.

DP/DashBoard/CRM User Manual



Now you can begin to drive your entire company’s operations on a daily basis from your new Intranet system. It is time to configure **DP/DashBoard/CRM**. See the **DP/DashBoard/CRM Admin > DP/DashBoard/CRM Configuration Options** section of Chapter 3, for details on how to completely configure the **DP/DashBoard/CRM** system.

NOTE

If your **DP/DashBoard/CRM** system does not successfully launch after completing all the installation and configuration procedures, refer to Chapter 3, **DP/DashBoard/CRM Troubleshooting Guide** section for solutions to common problems. The Troubleshooting Guide section will be frequently updated.

Congratulations!!!

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CHAPTER 3 USING DP/DASHBOARD/CRM

This chapter describes the steps necessary to configure your DP/DashBoard/CRM and how to use its incredible features. The DP/DashBoard/CRM Menu System Screen is divided into sections based on functionality.



The following table describes the breakdown of this chapter, and where you can find specific information.

Section in Chapter	What You Will Find
Calendar & Tasks	Overview and detailed procedures on how to use all the features in the Event Calendar and Project Management functions.
DP/DashBoard/CRM Admin	Overview and detailed procedures on how to configure your entire DP/DashBoard/CRM program. Functions include configuring all details of the event calendar/tasks, documentation management, maps and directions to your company, and color settings.
Reports & Drilldowns	Overview and detailed procedures on how to use all the features for running reports and performing drilldowns. Categories include: Perform General Ledger Company Consolidation, Balance Sheet, Income Statement, Financial Statement Drilldown, Bank Account Balances, Accounts Payable Aging and Drilldown, Accounts Payable Transactions & Drilldown, Accounts Receivable Aging and Drilldown, Accounts Receivable Sales Reporting & Drilldown.
Customer Support	Overview and detailed procedures on all customer support functions. Functions include: Review/Add Tickers, Review/Add Customer Support Tickets, Search for Customer Support Ticket By Number, Change Customer Profile, Add a New Customer Profile, Retrieve Customer Mailing Data.
Sales & Purchasing	Overview and detailed procedures on sales and purchasing functions. Functions include: Add a Sales Order, View an Existing Sales Order, View an Existing Purchase Order, Inventory Item Inquiry, View Inventory Sales History by Customer, List Open Orders, Inventory Reorder.
Payroll Timesheets	Overview and detailed procedures on Timesheet functions. Provides internal users within the firm with the ability to key in their daily timesheets without having to provide users direct access to the Payroll program and/or the Payroll data files. Security rights can restrict users to being able to only enter time entries for their login user id only. All entries are posted directly to the standard Timesheet Entry module which is directly integrated to the Payroll module for summarization and processing. Functions Include: Review/Add Timesheets, Timesheet Report and Retrieve Employee Mailing Data.
Job Cost Management	Overview and detailed procedures on Job Cost Management functions. Functions include: Add New Job, Change Existing Job, Manage Job Detail, Job Income/Expense Report, Order Job Detail in PO, and Enter Job Billing and Manage Job Crew.
Maps & Lists	This portion of the main menu options is user-defined, but comes standard with the following options: Maps & Directions and Internal Phone List. This is where you could put your company map so that it is accessible for your employees to print, email, or fax it to clients that wish to visit your facility. The internal phone list is self-generating as new users are added in the configuration options.

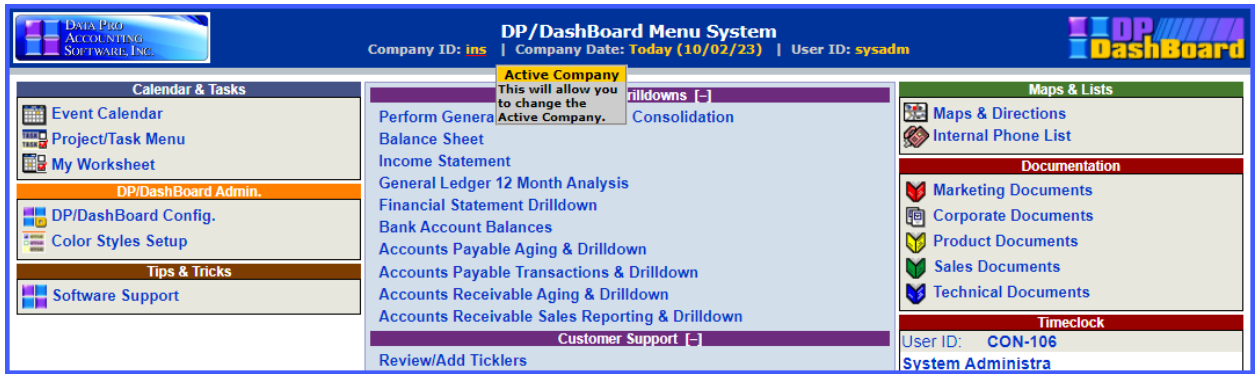
Documentation	This section of the main menu is user defined, but comes standard with the following options: Marketing Documents, Corporate Documents, Support Documents, Sales Documents and Technical Documents. This is where you could display documents/links related to these topics for your employees to access.
Tips & Tricks	This section of the main menu is user defined, but comes standard with Quick References. This is where you could display document/links that are related to technical support issues, new product features, etc.
Timeclock	This section is only active if you have the Time Sheet Entry and Payroll modules integrated and turned on with the configuration of Users on the DP/DashBoard/CRM system. Each user must be connected to the employees actual Employee Number found within the payroll module so that the integration can be processed to the actual Timesheet Entry.

GENERAL FUNCTIONS

This section describes features of the **DP/DashBoard/CRM** interface that are consistent throughout the program screens.

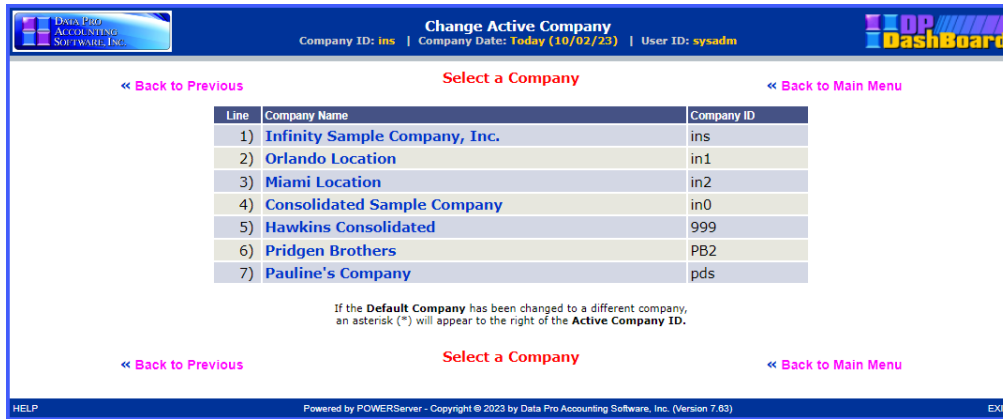
Change Active Company

You can change the “**active company**” from any screen within the **DP/DashBoard/CRM** program. The following screen illustrates this function.



To Change the Active Company:

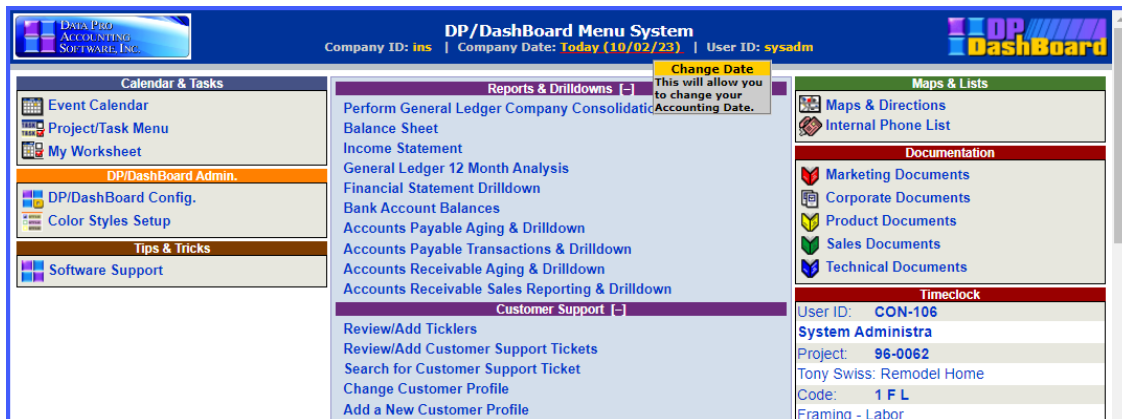
1. At the top of any **DP/DashBoard/CRM** screen, <click> on the **Company ID** in the main title bar. The **Change Active Company** screen displays.



2. Select the desired company from the **Company Name** column. A message displays confirming the active company has been changed to the one selected.
3. Click the **Return to Menu** option. The **Change Active Company** screen closes and returns to the **DP/DashBoard/CRM Menu System** screen.

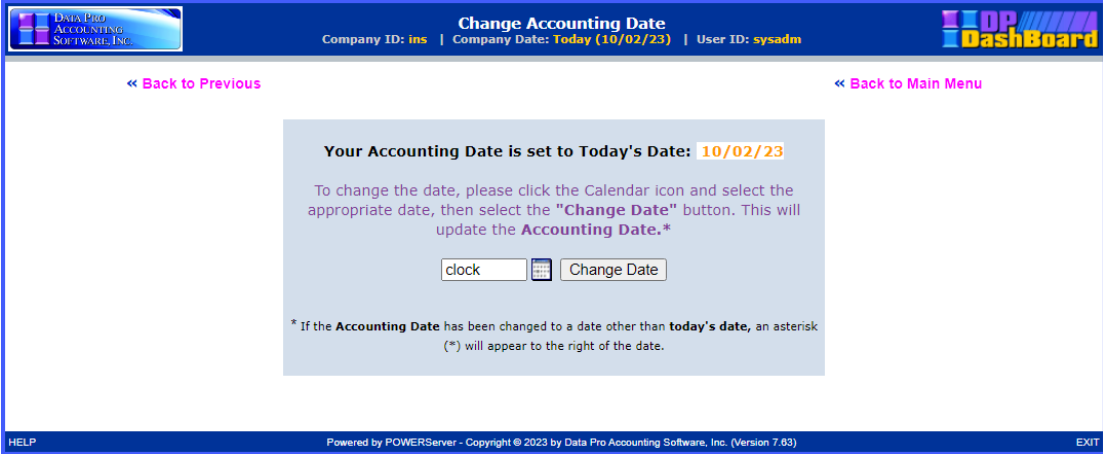
Change System Date


You can change the “**system date**” that reflects your accounting date from any screen within the **DP/DashBoard/CRM** program. The following screen illustrates this function.



To Change the System Date:

1. At the top of any **DP/DashBoard/CRM** screen, <click> on the **Company Date** in the main title bar. The **Change Accounting Date** screen displays.



2. <Click> the calendar icon  next to the date display box to select the desired system date. **Hint:** <Click> on << to change the month/year prior to the current date, or <click> >> to change the month/year after the current date. The calendar closes and the selected event date displays.
3. <Click> the **Change Date** button. The **Change Accounting Date** screen closes and returns to the **DP/DashBoard/CRM Menu System** screen, reflecting the new date at the top of the screen.

OR

4. <Click> the **Change to Today's Date** button to change the system date to the current date. The **Change Accounting Date** screen closes and returns to the **DP/DashBoard/CRM Menu System** screen, reflecting the current date at the top of the screen.

Pop-Up Menu

You can access a pop-up menu from any screen within the DP/DashBoard/CRM program. The pop-up menu provides quick access to all the features of the DP/DashBoard/CRM Menu System screen including **Reports & Drilldowns, Customer Support, Custom Applications, Calendar, Admin, Tips & Tricks, Maps & Lists, and Documentation.**

The following screen illustrates this function.



To Access the Pop-Up Menu:

1. At the top right of any DP/DashBoard/CRM screen, <click> on the **Company Logo** in the title bar. The **Pop-Up Menu** displays.

Pop-Up Menu
Co. ID: **ins** | Co. Date: **Today (10/02/23)**

Reports & Drilldowns

- Perform General Ledger Company Consolidation
- Balance Sheet
- Income Statement
- General Ledger 12 Month Analysis
- Financial Statement Drilldown
- Bank Account Balances
- Accounts Payable Aging & Drilldown
- Accounts Payable Transactions & Drilldown
- Accounts Receivable Aging & Drilldown
- [Accounts Receivable Sales Reporting & Drilldown](#)

Customer Support

- Review/Add Ticklers
- Review/Add Customer Support Tickets
- Search for Customer Support Ticket
- Change Customer Profile
- Add a New Customer Profile
- Retrieve Customer Mailing Data

Sales and Purchasing

- Add New Sales Order
- View an Existing Sales Order
- View an Existing Purchase Order
- Inventory Item Inquiry
- View Inventory Sales History by Customer
- List Open Orders
- Inventory Count Report
- Inventory Reorder

Payroll Timesheets

- Review/Add Timesheets
- Timesheet Report
- Retrieve Employee Mailing Data

Job Cost Management

- Add New Job
- Change Existing Job
- Manage Job Detail
- Job Income/Expense Report
- Order Job Detail in PO
- Enter Job Billing
- Manage Job Crew

Custom Applications

DP/DASHBOARD/CRM ADMINISTRATION

The **DP/DashBoard/CRM Administration** section of the **DP/DashBoard/CRM Menu System** screen consists of the **DP/DashBoard/CRM Configuration** and **Color Styles Setup** options. Users **MUST** have “**Administration Rights**” to access these menu options.

Keep in mind that most options may be removed through security limitations, which are turned on and off through the **Infinity POWER Advanced Security Administrator** module. If you wish to specifically fine tune these features at this time, go to the **Infinity POWER Advanced System Administrator** module and check the documentation on how to control “**user and group**” rights to specific menu options.

Otherwise, this section, and the following sections, are designed to explain your ability to configure the **DP/DashBoard/CRM** system with all of its variations and possibilities. Remember, that unless you have the specific **Infinity POWER** accounting modules installed, which were detailed earlier in the requirements section of this manual, some of the accounting options seen here will not appear on your system.

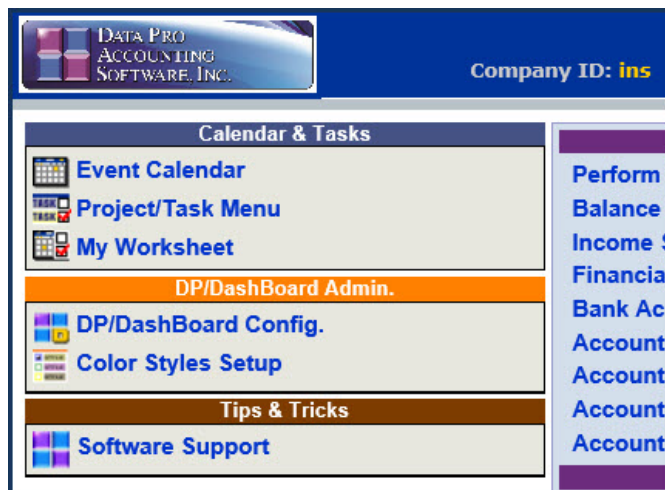
You must have all of the corresponding accounting applications installed and running on your system for them to properly integrate with the **DP/DashBoard/CRM** product. This includes accounting modules such as **General Ledger, Accounts Payable, Check Reconciliation** and **Accounts Receivable**.

NOTE

Keep in mind, if you decide not to deploy all of these features, they will not automatically appear without their proper installation in the accounting system too.

The system can be configured to meet your company’s specific needs. This includes setting up a wide range of pieces of information including **Departments, Users, Calendar Resources, Company Addresses** and **Phone Numbers, Corporate Logos, Documents**, and much more.

The following screen illustrates the section (*in the upper left-hand corner of the screen*) where these options are displayed.

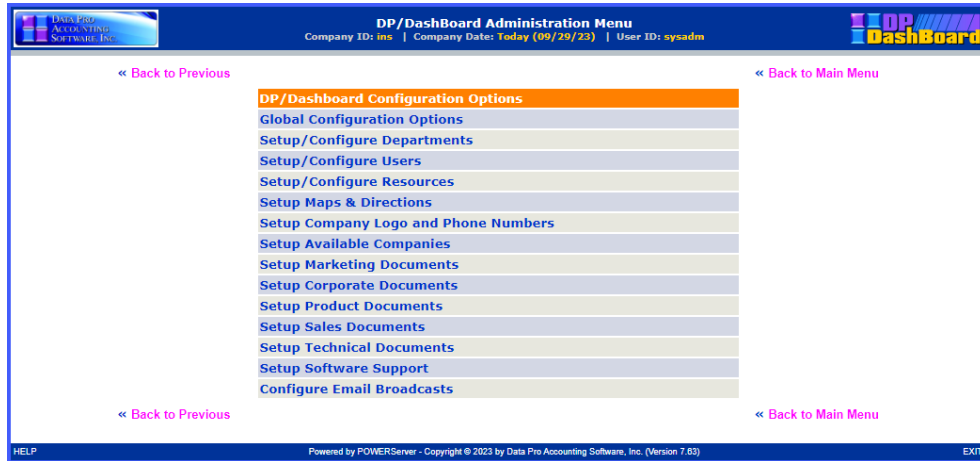


DP/DashBoard/CRM Config Options

The DP/DashBoard/CRM Config Options section of the DP/DashBoard/CRM Menu System screen provides the capability to setup global configurations, departments, new users, corporate resources, company documents, and other customizable options. This section assumes that you have logged into the DP/DashBoard/CRM program with complete rights and intend to view all options.

To Access the Configuration Options Screen:

1. On the left side of the DP/DashBoard/CRM Menu System screen, select the DP/DashBoard/CRM Config option from the DP/DashBoard/CRM Administration section. The DP/DashBoard/CRM Administration Menu screen displays.



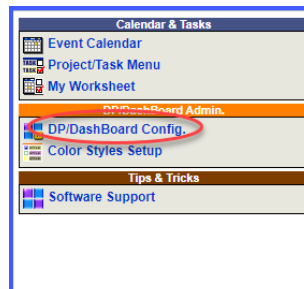
Global Configuration Options

This configuration option allows you to setup global options for the calendar and project/task functions that are viewed from the Calendar & Tasks section of the DP/DashBoard/CRM Menu System screen.

The **Global Configuration** options section deals with the configuration and design of the **Event Calendar** and **Project/Task Manager** programs which are included as standard features within the DP/DashBoard/CRM system. These are very powerful tools that are designed to allow for company wide use. This includes a single calendaring tool for a single office or even multiple offices as well as a **Project Task Management** system designed to allow you to keep track of a variety of things to be done, both personally and professionally.

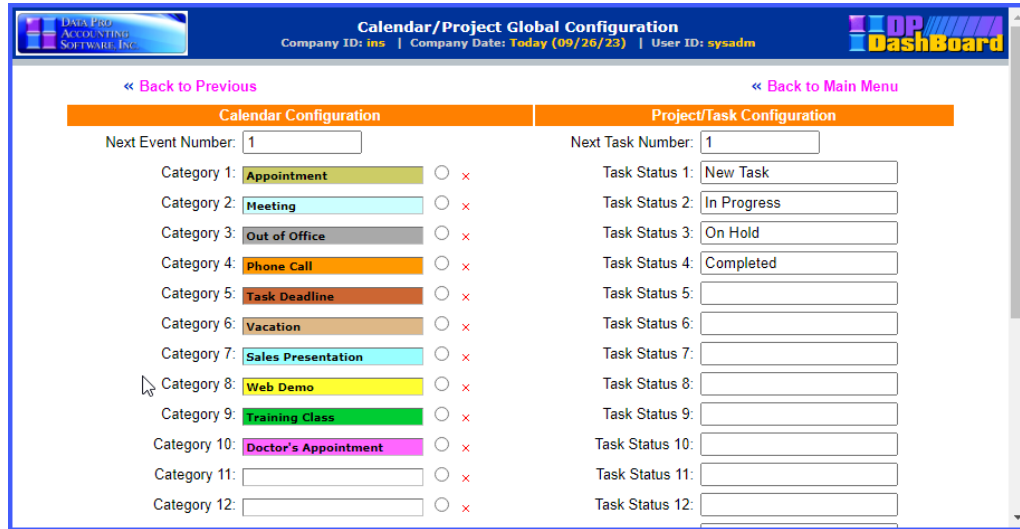
The **Calendar Configuration** defines the **Category** pull-down menus accessed in the **Calendar** screen and from the “Add New Event” screen. The **Project/Task Configuration** defines the pull-down menu accessed in the “Add New Event” or “Change Event” screens.

The following screen illustrates the section in the left right-hand corner of the screen where these options are displayed.



To Setup/Modify Global Configuration Options:

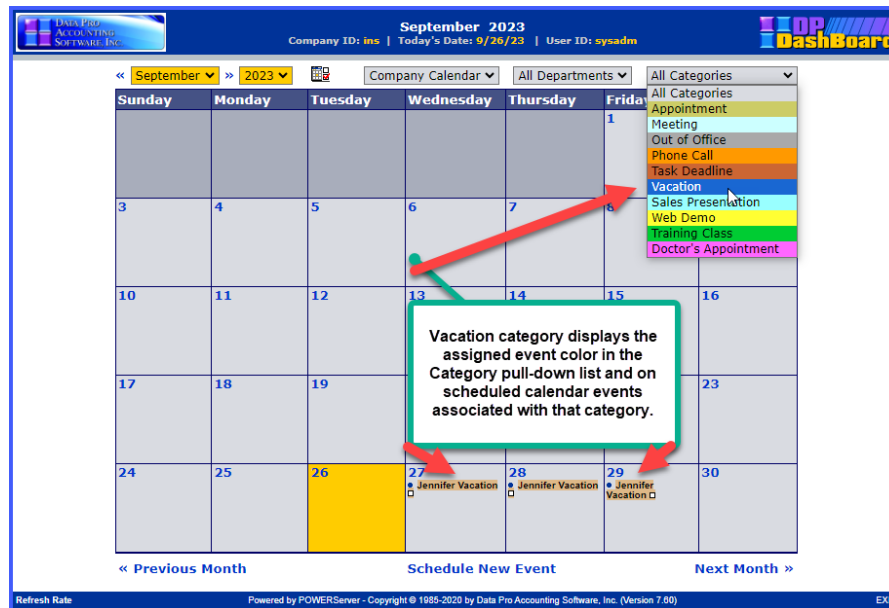
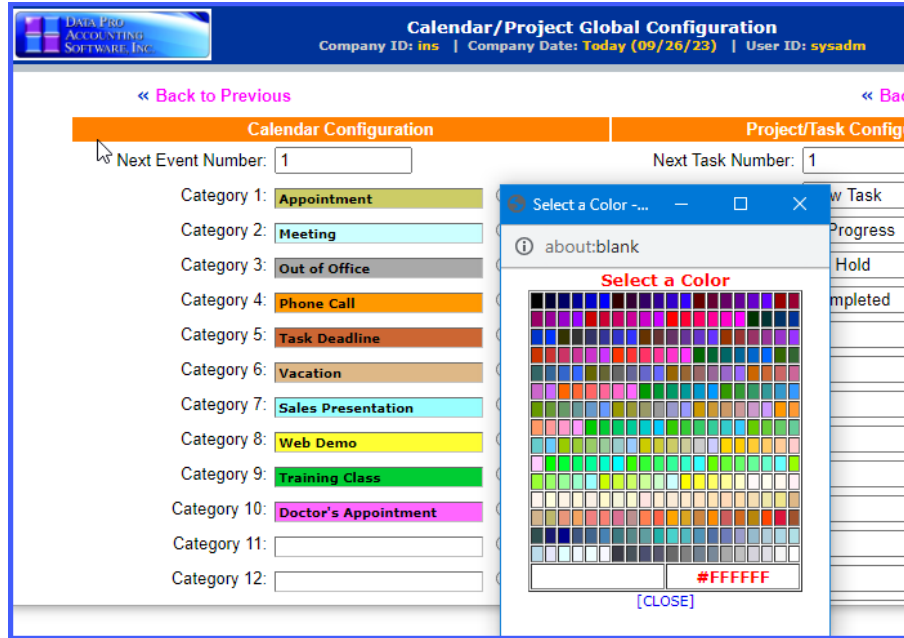
1. From the **DP/DashBoard/CRM Administration Menu** screen, select the **Global Configuration Options** menu option. The **Calendar/Project Global Configuration** screen displays.



The following table describes the **Calendar/Project Global Configuration** screen details:

Next Event Number	Text box that defines the next event number. Automatically increments to the next consecutive number. When performing the configuration for the first time, the event number begins with “1.”
Category	Text box that defines the listed items in the Category pull-down menu in the Calendar and the Add/Change Event screens.
Next Task Number	Text box that defines the next task number. Automatically increments to the next consecutive number. When performing the configuration for the first time, the task number begins with “1.”
Task Status	Text box that defines the listed items in the Task Status pull-down menu in the Add/Change Event screens.
Color Selection Radio Button	Click the color selection radio button next to the associated event to assign an event color. (ex: Select Aqua for Vacation). These event colors display in the Event Calendar when you select the Category pull-down menu when scheduling an event. Scheduled events display in the assigned category color so that events are easy to recognize.
(Remove Color) x	Click the red “x” to remove the color selection and return to the default of “no color”.

2. Enter a new category in the next available **Category** text box, or type over an existing category definition to modify one.
3. If you want to assign an event color to associate to the category, click the radio button next to the desired Category and select the desired color from the **Color Palette**. The default is no color.



4. Enter a new task in the next available **Task Status** text box, or type over an existing task status definition to modify one.
5. <Click> the **Save** button. A message displays confirming the configuration record has been updated. The window closes and returns to the **DP/DashBoard/CRM Administration Menu** screen.

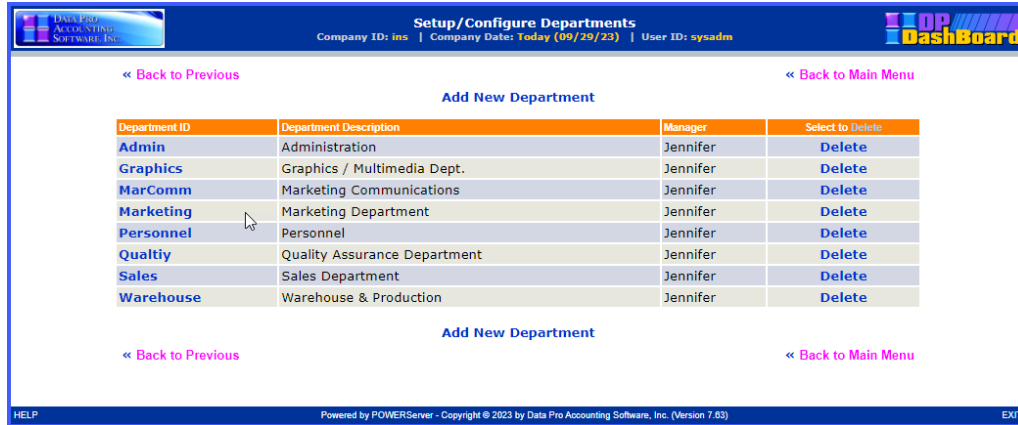
Setup/Configure Departments

This set of options allows the setup and configuration of Departments, which are throughout the **DP/DashBoard/CRM** program. For instance, departments are used specifically as new users are added into the system and their associated departments are assigned, which automatically updates the corporate phone list with this information.

The departments defined also display in the pull-down menus of the Event Calendar and Project Task Menu screens to select a specified department for those functions. Departments can be added, modified, and deleted.

To Access the Setup/Configure Departments Screen:

1. From the **DP/DashBoard/CRM Administration Menu**, select the **Setup/Configure Departments** menu option. The **Setup/Configure Departments** screen displays.



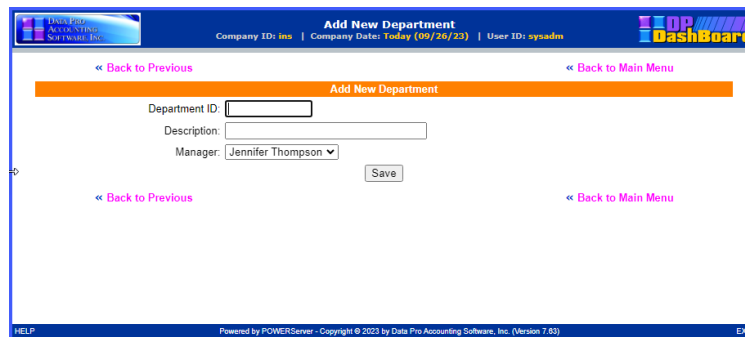
The following table describes the **Setup/Configure Departments** screen details:

Department ID	Maximum of 11 alpha/numeric characters. Abbreviation of the department (e.g. MarComm for Marketing Communications).
Department Description	Maximum of 28 alpha/numeric characters. Full name of the department (e.g. Marketing).
Manager	Name of user (with manager permissions) assigned to the department.
Select to Delete	Selecting a component in this column deletes the associated department from the DP/DashBoard/CRM system database.

To Add a Department:

This option allows you to add a new department to the database. This is immediately reflected throughout the **DP/DashBoard/CRM** system.

1. From the Setup/Configure Departments screen, <click> the **Add New Department** option. The Add New Department screen displays.

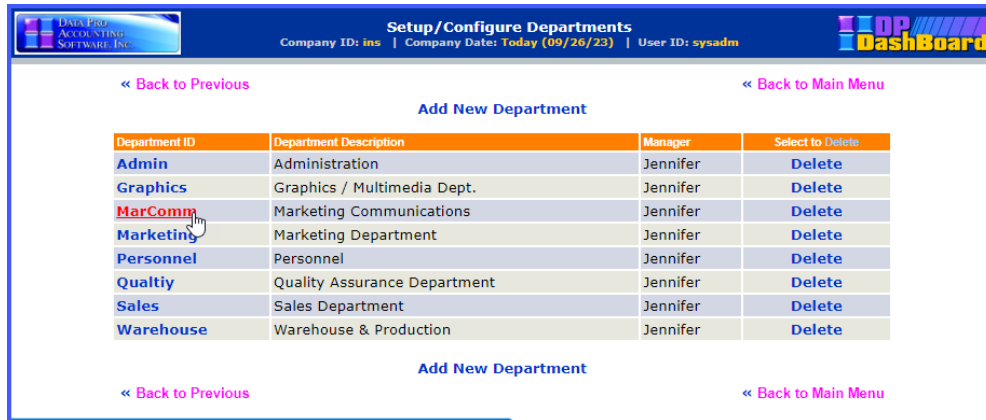


2. Enter the desired department identification in the **Department ID** text box. This is a maximum of eleven (11) alpha/numeric characters.

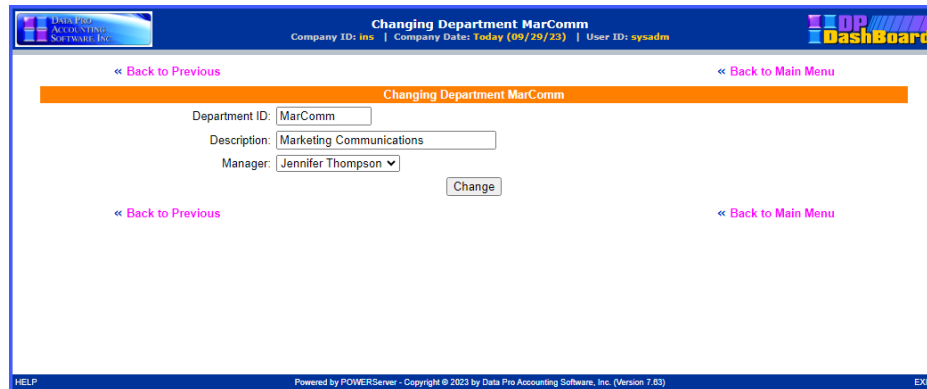
3. Enter a description of the department in the **Description** text box. This is a maximum of twenty-eight (28) alpha/numeric characters.
4. Select the appropriate user to assign management responsibilities for the department from the **Manager** pull-down menu.
5. <Click> the **Save** button. A message displays confirming the database records have been updated. The window closes and returns to the Setup/Configure Departments screen where the new department is now listed.

To Modify a Department:

This option allows you to change information associated with an existing department (e.g. change the name of the department or assign a new manager).



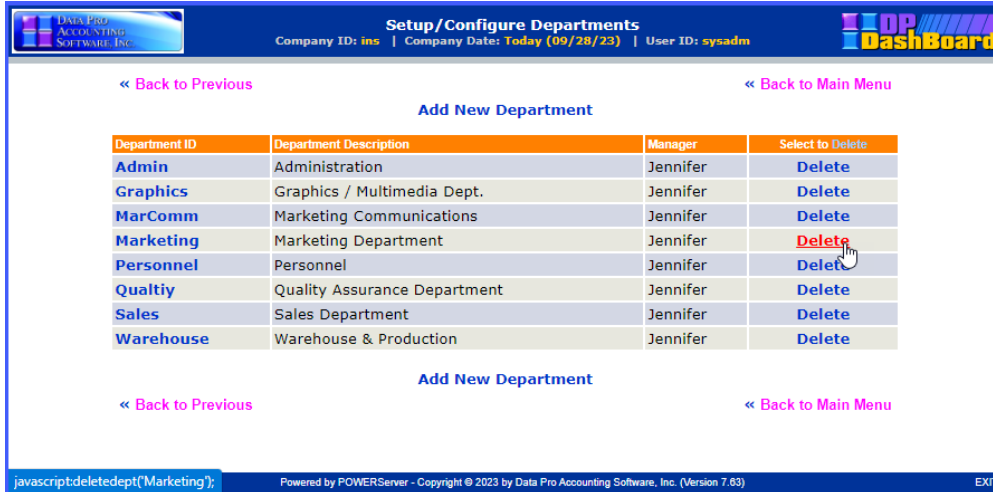
1. From the Setup/Configure Departments screen, <click> the department in the **Department ID** column to be modified. The Changing Department screen displays, reflecting the name of the department selected.



2. Make desired changes to the department description in the **Description** text box.
3. To assign a different manager to the department, select another user from the **Manager** pull-down menu.
4. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Departments screen where the changes are now listed.

To Delete a Department:

This option allows you to delete an existing department from the DP/DashBoard/CRM database. Once a department is deleted it is not longer available throughout the system where departments are applicable.



1. From the Setup/Configure Departments screen, <click> **Delete** from the **Select to Delete** column for the desired department to be deleted. A dialog box displays requesting confirmation to delete the selected department.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Departments screen where the department is now deleted.

Setup/Configure Users

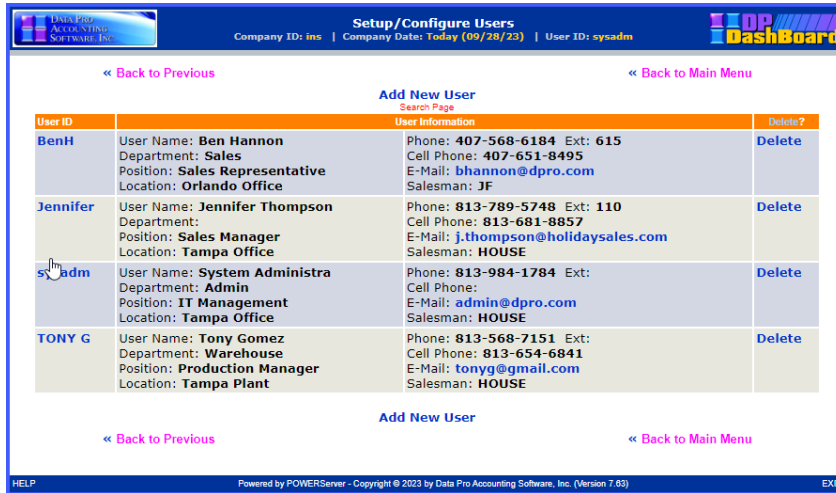
This option is essential in configuring new users in the system. Adding users automatically includes their information in the Company Phone List. It also provides them rights to use the Event Calendar and Project Management System.

NOTE

If the Customer Support Management system is deployed, it also needs to be configured to synchronize with the salesman file in the Accounts Receivable system so that accurate billing credits are reported between the two systems.

To Access the Setup/Configure Users Screen:

1. From the DP/DashBoard/CRM Administration Menu screen, select the **Setup/Configure Users** menu option. The Setup/Configure Users screen displays.



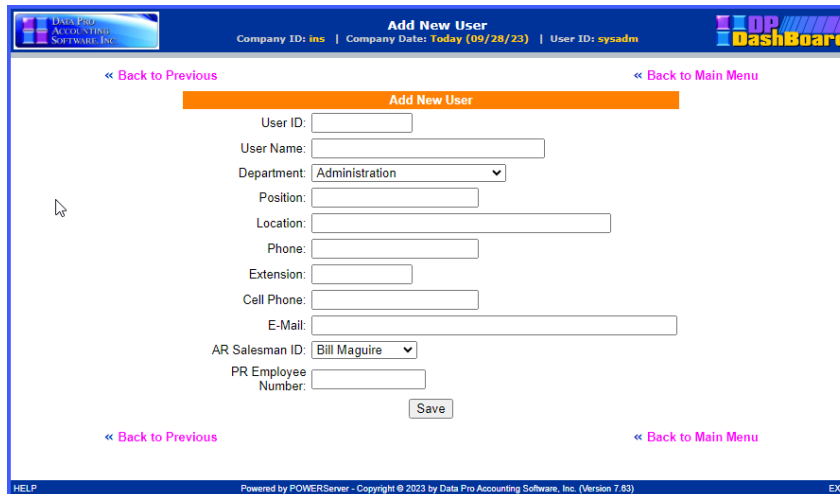
The following table describes the **Setup/Configure Users** screen details:

User ID	Maximum of 11 alpha/numeric characters. Abbreviation of the user’s name for login and identification purposes.
User Information	Detailed information about the user such as name/position, contact, and location information.
Delete?	Selecting a component in this column deletes the associated user from the DP/DashBoard/CRM system database.

To Add a New User:

This option allows you to add a new user to the **DP/DashBoard/CRM** system database.

1. From the Setup/Configure Users screen, <click> the **Add New User** option. The Add New User screen displays.



The following table describes the **Add New User** screen details:

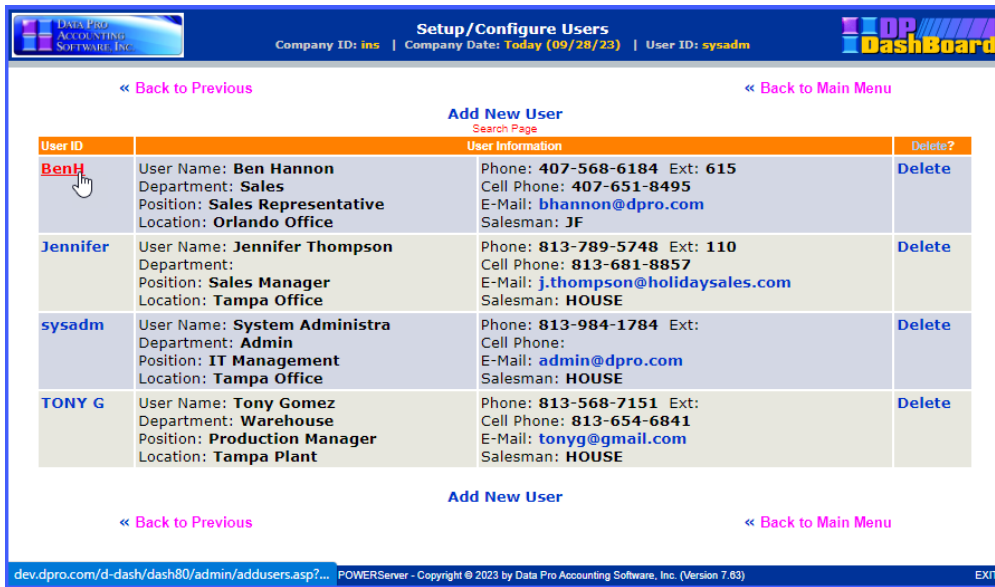
User ID	Maximum of 11 alpha/numeric characters. Abbreviation of the user’s name for login and identification purposes.
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User Name	Detailed information about the user such as name/position, contact, and location information.
Department	Pull-down menu. Select the department the user is associated with.
Position	Maximum of 20 alpha/numeric characters. Describes the employee's position or title within the company.
Phone	Maximum of 20 alpha/numeric characters. Allows for the entry of the contact phone number for the employee. This can include a " country code " if outside the country. It is recommended that a standardized format be established within your company (e.g. use of hyphens versus parenthesis) for entering phone numbers.
Extension	Maximum of 11 alpha/numeric characters. The extension is separate so that each user's private phone number can be stored separately.
Cell Phone	Maximum of 20 alpha/numeric characters. Optional field providing cell phone number of the employee.
E-mail	E-mail address of the employee. This is important to setup for all users so that when using the calendar function, a user can automatically be emailed a notification if scheduled to attend a meeting. This function is not possible without an e-mail address.
AR Salesman ID	<p>If using the Customer Support Management feature in DP/DashBoard/CRM, the Accounts Receivable (AR) module needs to be installed and AR Salespeople need to be added to the AR system. This means you intend to allow them to bill for Support Tickets and other items in the system. This field creates a link between the User ID and the AR Salesman file so that if transactions occur, there is relationship pre-established for billing purposes.</p> <p>NOTE: A single Salesman called "House" or "Do not Use" should be setup for users that have no link to billing. If the Salesman has not been setup, you can select "House" for the time being, save the User ID and go the AR module and add the new Salesman number. Return to this option to change the AR Salesman ID to coordinate with the new Salesman number.</p>

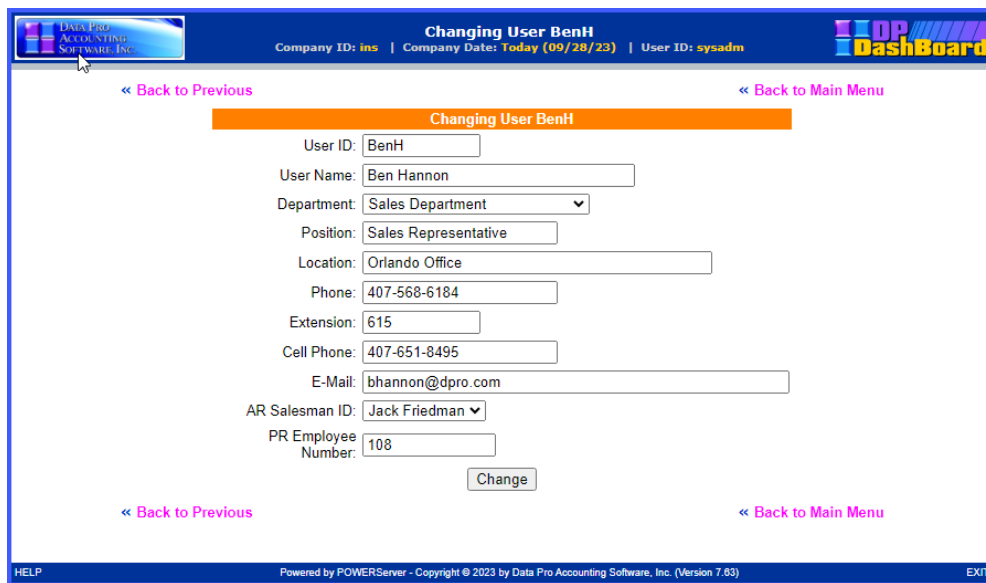
2. Enter the new user identification in the **User ID** text box.
3. Enter the name of the user in the **User Name** text box.
4. Select the department the user is associated with from the **Department** pull-down menu.
5. Enter the position or title of the user in the **Position** text box.
6. Enter the location of the user in the **Location** text box.
7. Enter the user's contact information in the **Phone**, **Extension**, **Cell-Phone**, and **E-mail** text boxes.
8. If the user will be using the Customer Support Management feature, select the AR Salesman ID from the **AR Salesman ID** pull-down menu.
9. <Click> the **Save** button. A message displays confirming the database records have been updated, closes, and returns to the Setup/Configure Users screen (Figure 3-19) where the new user is now listed.

To Modify a User:

This option allows you to modify information for an existing user in the **DP/DashBoard/CRM** system database.



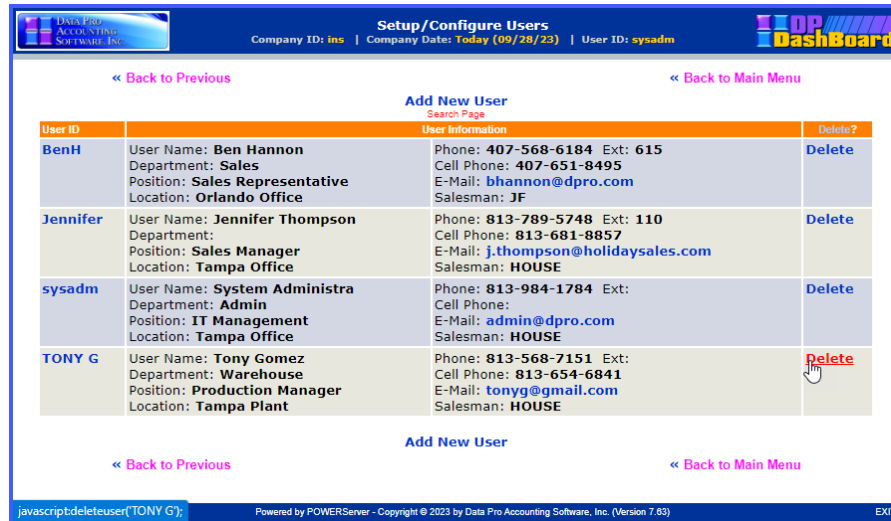
1. From the Setup/Configure Users screen, <click> the user in the **User ID** column to be modified. The Changing User screen displays.



2. Make any desired changes in the appropriate text boxes and pull-down menus.
3. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Users screen where the changes are now listed.

To Delete a User:

This option allows you to remove a user from the DP/DashBoard/CRM system database. Once a user is deleted from the system, they will no longer have access to the Calendar, Project Management, or other functions associated with users within the program. The Company Phone List automatically removes a user from the list if they are deleted from the database.



1. From the Setup/Configure Users screen, < click> **Delete** from the Delete column for the desired user to be deleted. A dialog box displays requesting confirmation to delete the selected user.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Users screen where the user is now deleted.

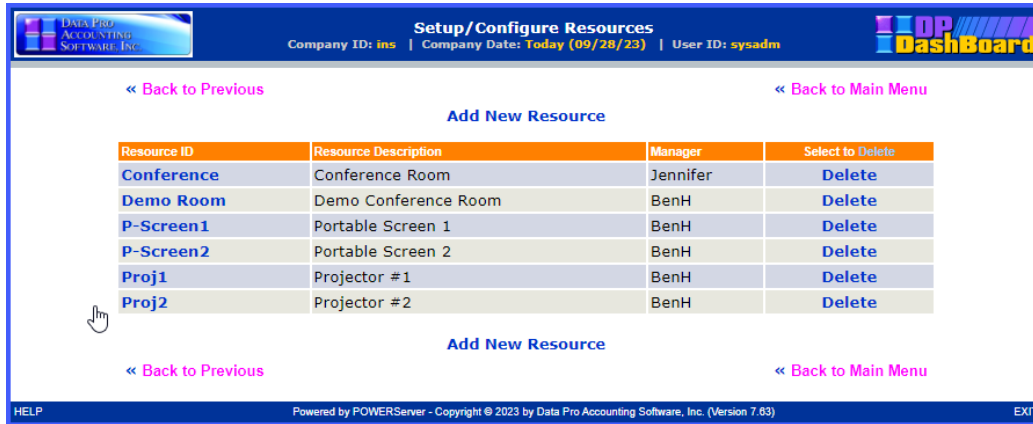
Setup/Configure Resources

This option is designed to create and manage “resources” that will be used throughout the Event Calendar system. These resources are limited only to your imagination since every organization is different. However, there are common items that could be found in many companies.

Resources such as conference rooms, projectors, screens, notebook computers, are commonly shared by various individuals within an organization. Therefore, this option provides for the ability to set these items up as a "resource" so that they may be tracked and scheduled, much like individuals, to compare for any possible conflicts within the Event Calendar system. It is not unlikely for an organization to want to book multiple meetings at the same time and not have enough meeting facilities to accommodate all requirements. This is a major function the Event Calendar utility can assist any organization in coordinating.

To Access the Setup/Configure Resources Screen:

1. From the **DP/DashBoard/CRM Administration Menu** screen, select the **Setup/Configure Resources** menu option. The Setup/Configure Resources screen displays.



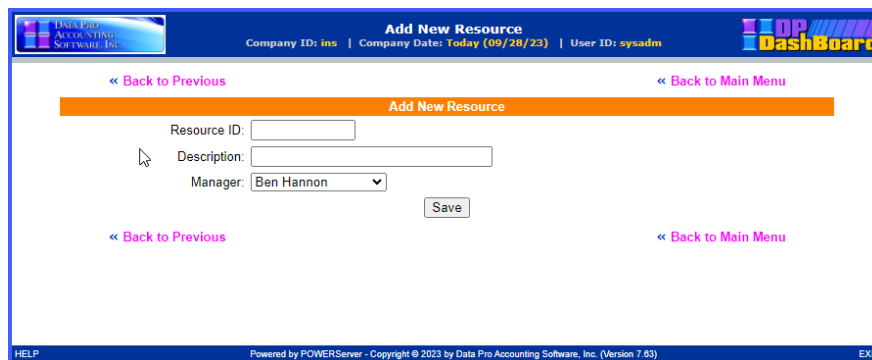
The following table describes the **Setup/Configure Resources** screen details:

Resource ID	Maximum of 11 alpha/numeric characters. Abbreviation of the resource (e.g. Proj1 for Projector 1).
Resource Description	Maximum of 28 alpha/numeric characters. Name of the resource.
Manager	Name of user (with manager permissions) assigned to keep track of the resource.
Select to Delete	Selecting a component in this column deletes the associated resource from the DP/DashBoard/CRM system database.

To Add a Resource:

This option allows you to add resources to the **DP/DashBoard/CRM** system database. Resources added are available in the Events Calendar function when scheduling meetings, etc.

1. From the Setup/Configure Resources screen, <click> the **Add New Resource** option. The Add New Resource screen displays.



The following table describes the **Add New Resource** screen details:

Resource ID	Maximum of 11 alpha/numeric characters. Abbreviation of the resource (e.g. Proj1 for Projector 1).
Description	Maximum of 28 alpha/numeric characters. Name of the resource.
Manager	Name of user (with manager permissions) assigned to keep track of the resource.

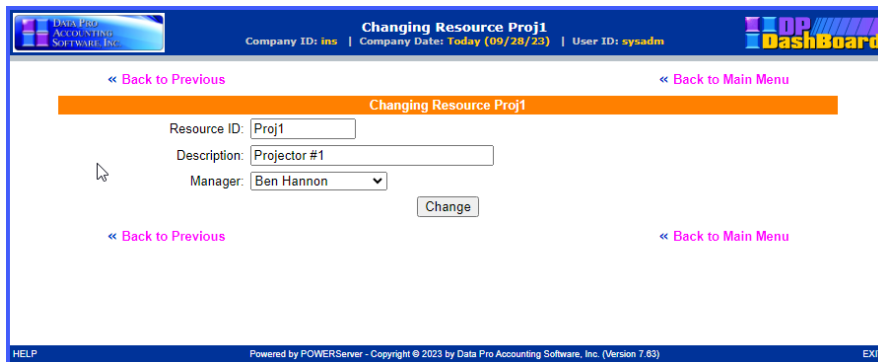
2. Enter the new resource identification in the **Resource ID** text box.
3. Enter a description of the resource in the **Description** text box.
4. <Click> the **Save** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Resources screen where the new resource is now listed.

To Modify a Resource:

This option allows you to make changes to an existing resource.



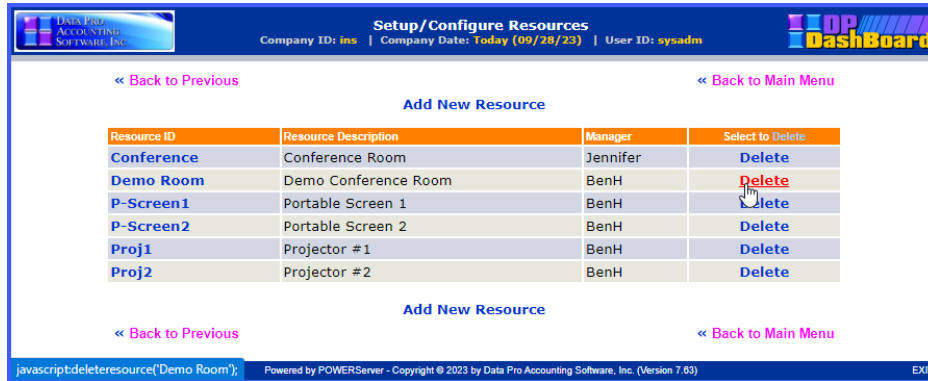
1. From the Setup/Configure Resources screen, <click> the user in the **User ID** column to be modified. The Changing Resource screen displays.



2. Make desired changes to the resource identification in the **Resource ID** text box.
3. Make desired changes to the resource identification in the **Description** text box.
4. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Resources screen where the changes are now listed.

To Delete a Resource:

This option allows you to remove a resource from the **DP/DashBoard/CRM** system database. Once a resource is deleted from the system, it is no longer available in the Calendar, Project Management, or other functions associated with resources within the program.

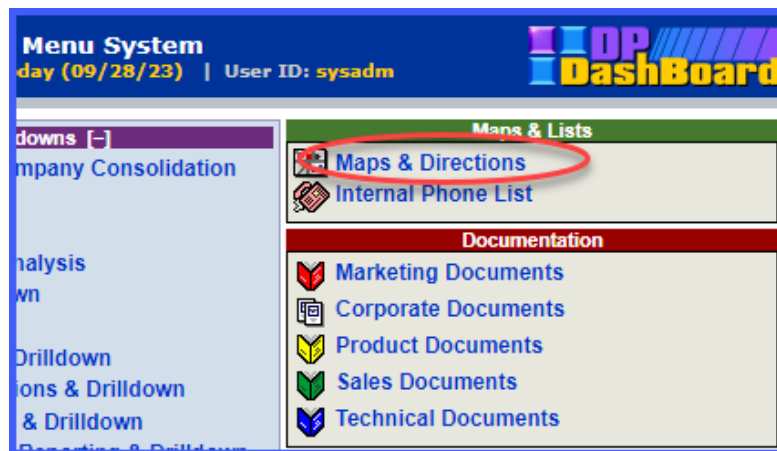


1. From the Setup/Configure Resources screen, <click> **Delete** from the Select to Delete column for the desired resource to be deleted. A dialog box displays requesting confirmation to delete the selected resource.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Resources screen where the resource is now deleted.

Setup Maps & Directions

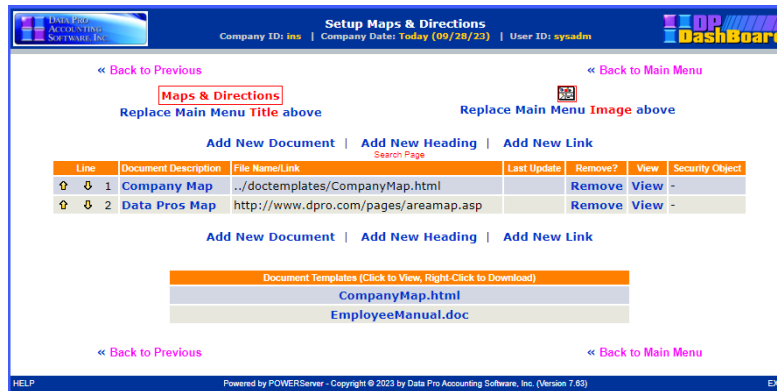
The Setup Maps & Directions option is designed to allow you to add, remove, and view a variety of maps and lists that are displayed in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen.

The following screen illustrates the section in the upper right-hand corner of the screen where these options are found once items have been added.



To Access the Setup Maps & Directions Screen:

1. From the **DP/DashBoard/CRM Administration Menu** screen, select the **Setup Maps & Directions** menu option. The Setup Maps & Directions screen displays.



As documents are added, they are displayed in a consecutively numbered list including the following document details:

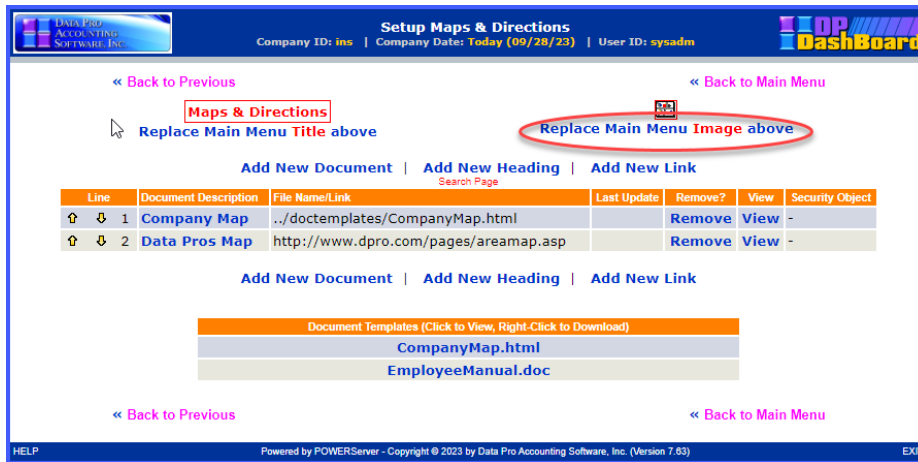
Line	Line number. System generated and automatically increments to the next highest number as documents /links are added. You can <click> on a bullet and drag/drop within the column to rearrange the order items appear in the list.
Document Description	Hyperlink. Description of document/link that you enter when you select the Add New Document or Add New Link option. Clicking on an item in this column will open the Changing Maps & Lists Document/Link window for the line item you selected. This window allows you to modify the description, source file, and security information for that document. This description also displays in the Maps & Directions screen in the DP/DashBoard/CRM Menu System screen (see the To Modify a Document/Heading/Link section).
File Name/Link	Name of file/link of new document. System generated based on the document file selected or path to the link provided when you select the Add New Document or Add New Link option in the Setup Maps & Directions screen.
Last Update	Date of most recent update to the file/link added. This column is automatically updated as files/links are revised.
Remove?	Hyperlink. Allows you to delete a document from the Maps & Directions screen on the DP/DashBoard/CRM Menu System screen (see the To Remove a Document/Heading/Link section).
View	Hyperlink. Opens the selected document for viewing while in Setup Mode (i.e. Preview). Headings added to the list of documents in the Setup Maps & Directions screen are labeled as such in the View Column.
Security Object	System generated. Displays the security permissions allocated to that particular document that were set up when the Add New Document or Add New Link option was selected. If security permissions are modified, this column will be automatically updated. See the Security Objects Definitions section of your <i>System Administrator User Manual</i> for a listing of security objects and their definitions.

To Replace the Maps & Directions Main Menu Image Icon:

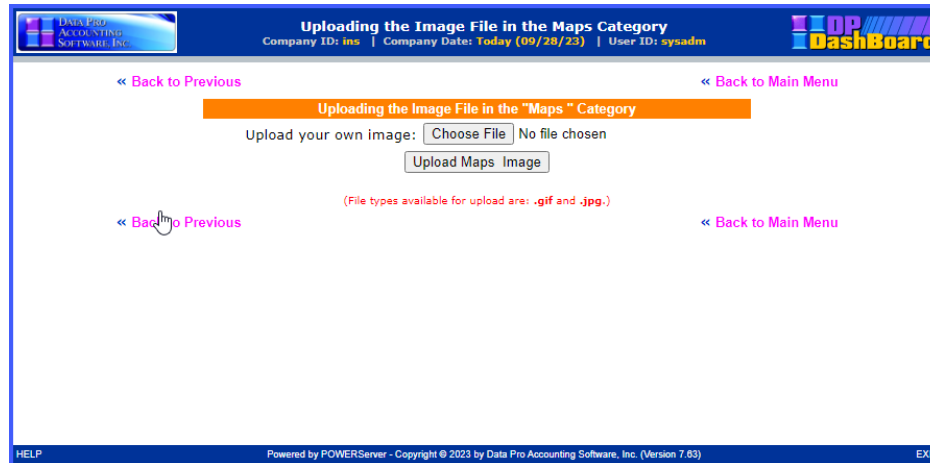
This option allows you to replace the existing image icon for this document category that is displayed in the DP/DashBoard/CRM Menu System screen. Perform the following steps to select a new image icon.

NOTE

Remember, you may need to work with your graphics program to correctly size the icon image to fit correctly on the DP/DashBoard/CRM screen.



1. From the Setup Maps & Directions screen, <click> the **Replace Main Menu Image above** option to select a new image icon. The Uploading the Image File in the Maps Category screen displays.



2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Choose File** button to select a path from your network.
3. Select the appropriate folder from the Windows folder on your PC or network drive.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in .jpg or .gif format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The window closes and the file name are now displayed in the Upload your own image text box.
6. <Click> the **Upload Maps Image** button. The Uploading File screen displays.

7. <Click> the **Back to Main Menu** option. The Upload Image Screen closes. The new image is updated in the Setup Maps & Directions screen and in the Maps & Lists>Maps & Directions section of the **DP/DashBoard/CRM Menu System** screen.

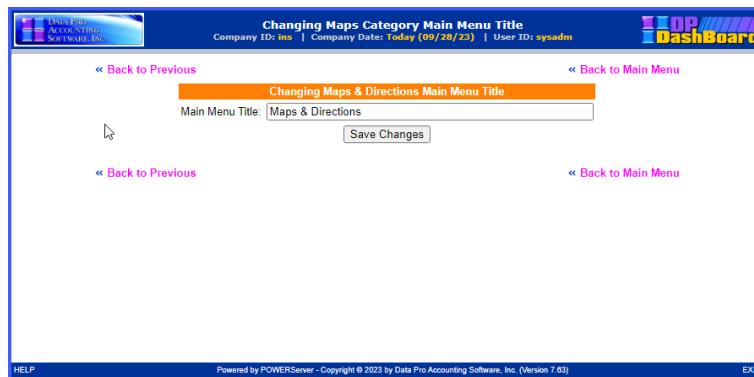
To Replace the Maps & Directions Main Menu Title:

This option allows you to rename the Main Menu title as it appears in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to rename the main menu title.

NOTE

Changing the main menu title will automatically update every screen/menu option that this name reflects.

1. From the Setup Maps & Directions screen, <click> the **Replace Main Menu Title Above** option to change the title as it displays in the Maps & Lists section of the **DP/DashBoard/CRM Menu System** screen. The Changing Maps & Directions Main Menu Title screen displays.

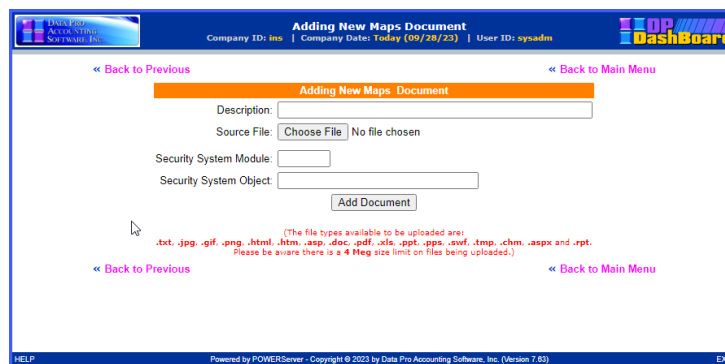


2. Highlight the existing title in the **Main Menu Title** text box and <enter> the desired new title.
3. <Click> the **Save Changes** button. The new title now displays on the Setup Maps & Directions screen and also in the Maps & Lists section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Maps & Directions Document:

This option allows you to add a new document in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to add a new document.

1. From the Setup Maps & Direction screen, <click> the **Add New Document** option. The Adding New Maps Documents Document screen displays.



2. <Enter> a description of the document in the **Description** text box.

3. In the **Source File** section, <click> the **Choose File** button. The Choose file window displays.
4. Select the appropriate folder from the **Look in** pull-down menu from the **Choose file** window.
5. Select the desired file or type in the exact filename of the document in the **File name** text box.

NOTE

The file types available to be uploaded are *.txt, .jpg, .gif, .html, .doc, .pdf, .xls, .csv, .ppt, .pps, .swf* and *.rpt*. Files cannot exceed 4 mb for upload.

6. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*). If you want everyone to have access to this document, then leave this option blank. See the *Security Objects Definitions Reference Manual* found in your *System Administrator User Manual* for a listing of security objects by module and their definitions.

NOTE

If certain documents are sensitive like certain accounting functions, then grant similar security rights from the accounting system's **Advanced Security Administrator** module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects.

Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (*i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.*).

7. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the *Security Objects Definitions Reference Manual* found in your *System Administrator User Manual* for a listing of security objects by module and their definitions.

8. <Click> the **Add Document** button. The Adding New Maps Documents Document screen closes and the new document now displays in the Setup Maps & Directions screen and also in the Maps & Lists>Maps & Directions section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Maps & Directions Heading:

This option allows you to add a new heading in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen. This is really useful if you want to categorize documents within a group. Perform the following steps to add a new heading.

1. From the Setup Maps & Direction screen, <click> the **Add New Heading** option. The Adding New Maps Heading screen displays.

2. <Enter> the New Heading in the **Description** text box.
3. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*). If you want everyone to have access to this document, then leave this option blank. See Step 6, NOTE, in the To Add a New Maps & Directions Document section for further explanation.
4. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

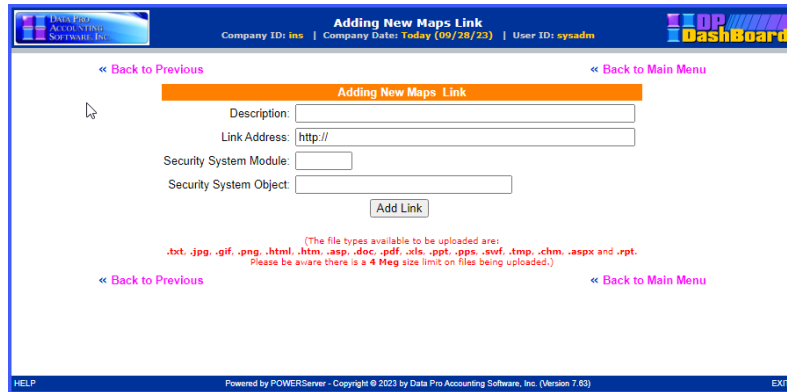
The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the *Security Objects Definitions Reference Manual* found in your *System Administrator User Manual* for a listing of security objects by module and their definitions.

5. <Click> the **Add Heading** button. A message displays confirming the document index has been updated.
6. <Click> the **Return to Menu** option. The Adding New Maps Heading screen closes and the new heading now displays as a list item in the Setup Maps & Directions screen as well as in the Maps & Lists>Maps & Directions section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Maps & Directions Link:

This option allows you to add a new link to a website in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to add a new link.

- From the Setup Maps & Directions screen, <click> the **Add New Link** option. The Adding New Maps Link screen displays.



- <Enter> a description of the document in the **Description** text box.
- <Enter> the path to the desired website in the **Link Address** text box.
- <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*).

If you want everyone to have access to this document, then leave this option blank.

See Step 6, NOTE, in the To Add a New Maps & Directions Document section for further explanation.

- <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the **Security Objects Definitions** section of your *System Administrator User Manual* for a listing of security objects by module and their definitions.

- <Click> the **Add Link** button. The Adding New Maps Link screen displays, confirming the document index has been updated. The window closes and returns to the Setup Maps & Directions screen. The new document link now displays in the list of maps and also in the Maps & Lists>Maps & Directions section of the **DP/DashBoard/CRM Menu System** screen.

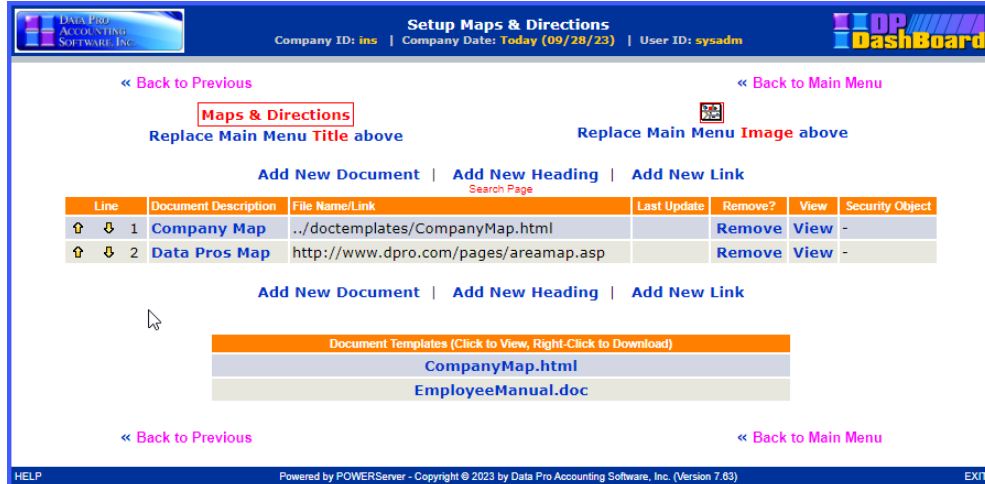
To Modify a Maps & Directions Document/Heading/Link:

This option allows you to modify the properties set up for documents, headings, and links that have been added to the list of items in the Setup Maps & Directions screen and accessible in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen.

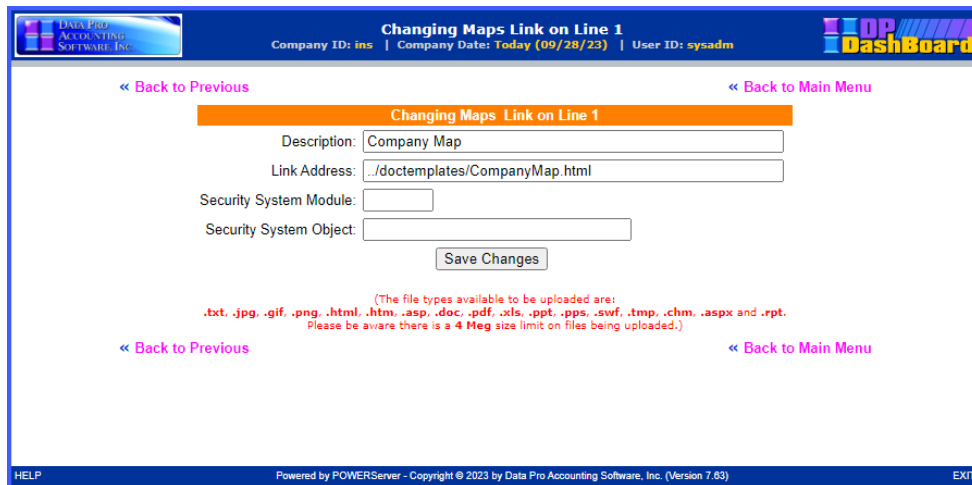
The following table describes the associated properties that can be modified for each of the item types listed in the Setup Maps & Directions screen.

Item Type	Properties to Modify
Document	Description, Source File, Security System Module, Security System Object. The current file name is displayed as well as the date of last update.

Heading	Description, Security System Module, Security System Object
Link	Description, Link Address, Security System Module, Security System Object.



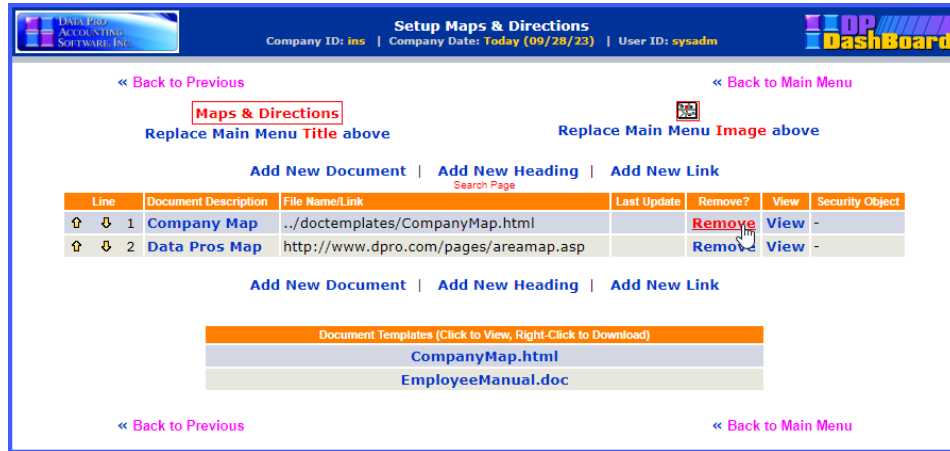
1. In the Setup Maps & Directions screen, <click> the list item to be modified in the **Document Description** column. The Changing Maps Document / Heading / Link screen displays, indicating the line number of the item to be modified.



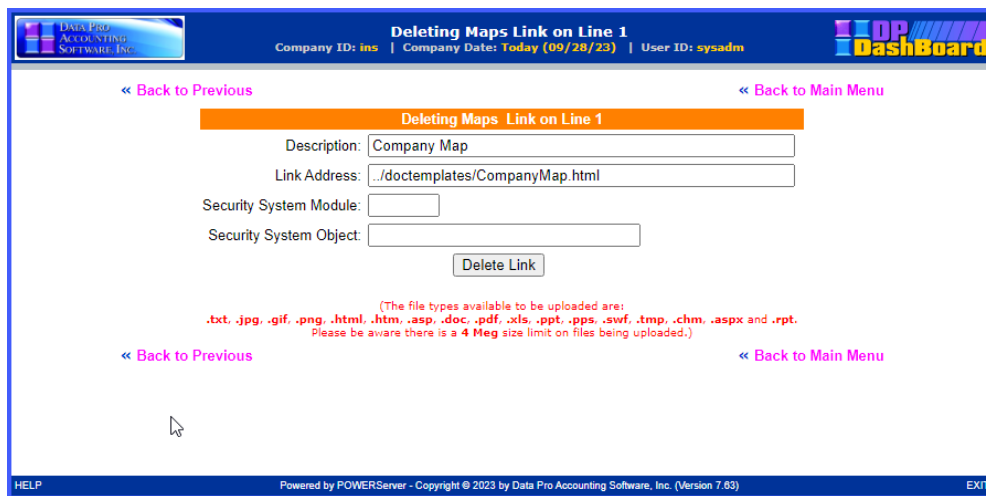
2. Depending on the item selected, make the desired changes in the applicable modifiable options.
3. <Click> the **Save Changes** button. A message confirms the document index has been updated.
4. <Click> the **Return to Menu** option. The window closes and returns to the Setup Maps & Directions screen. The modifications are now updated in the document list in the Setup Maps screen and in the Maps & Lists>Maps & Directions section of the **DP/DashBoard/CRM Menu System** screen.

To Remove a Maps & Directions Document/Heading/Link:

This option allows you to delete documents, headings, and links that have been added to the list of items in the Setup Maps & Directions screen and in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen.



1. In the Setup Maps & Directions screen, <click> the **Remove** option from the Remove? column for the item to be deleted. The Deleting Maps Document/Heading/Link screen displays, indicating the line number of the item to be deleted.



2. <Click> the **Delete Document/Heading/Link** button. A message confirms the document index has been updated.
3. <Click> the **Return to Menu** option. The window closes and returns to the Setup Maps & Directions screen. The selected item has been deleted from the document list in the Setup Maps & Directions screen and in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen.

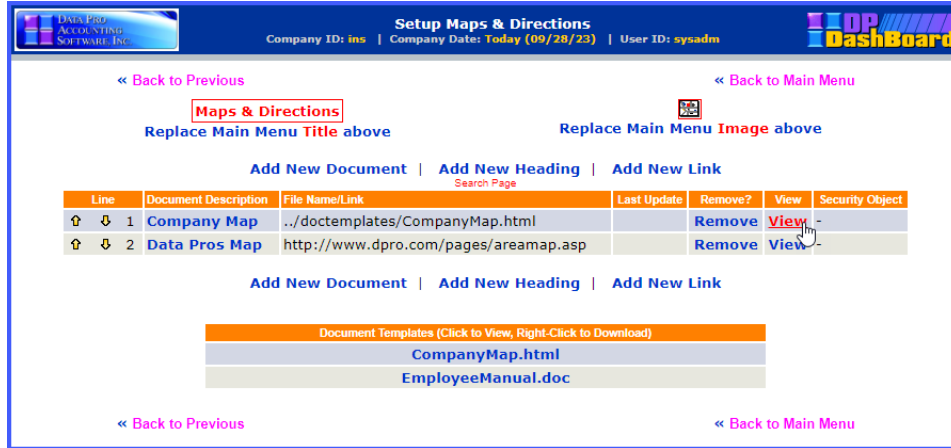
To View a Maps & Directions Document/Heading/Link:

This option allows you to view documents and links that have been added to the list of items in the Setup Maps & Directions screen and in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard/CRM Menu System** screen.

Selecting the view function will automatically open the selected document or launch the website associated with the selected link.

NOTE

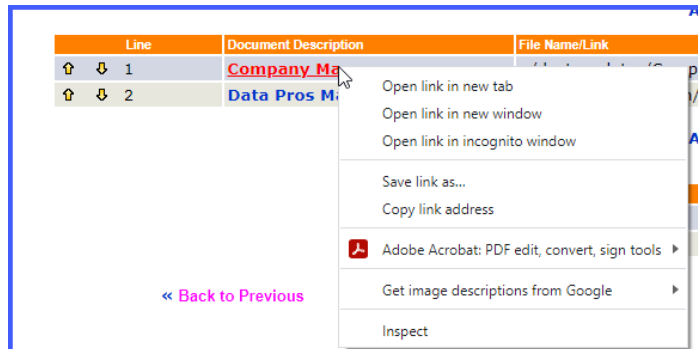
Headings can only be viewed by selecting the Maps & Lists>Maps & Directions menu option from the DP/DashBoard/CRM Menu System screen.



1. In the Setup Maps & Directions screen, <click> the **View** option from the **View** column for the item to be opened. The document or website automatically opens for viewing. Closing the document or website returns you to the Setup Maps & Directions screen.

To Download a Maps & Directions Document Link:

1. From the Maps & Directions screen, <right-click> the desired document to download from the **Document Description** column and select the **Save Link As** option. The **Save Link As** window displays.

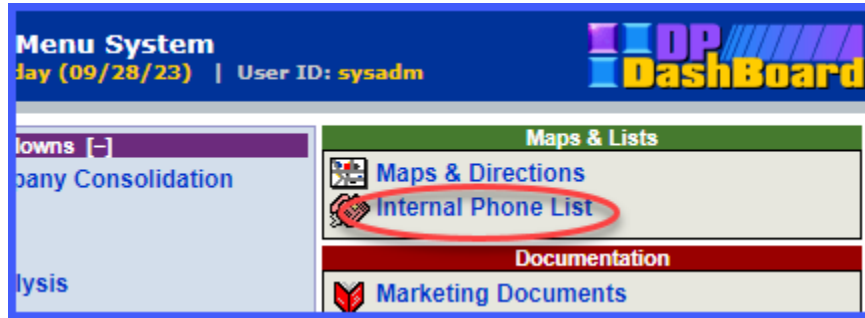


2. Select the desired directory to save the link to:
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

Setup Company Logos and Phone Numbers

This configuration option allows you to add and modify your company address, contact information (phone and fax numbers), and Phone List image that are displayed in the **Maps & Lists>Internal Phone List** section of the DP/DashBoard/CRM Menu System screen. You can also change your company logo, which will globally update wherever the current logo displays throughout the system.

The following screen illustrates the section in the upper right-hand corner of the screen where these options are displayed.



To Access the Setup Company Logo and Phone Numbers Screen:

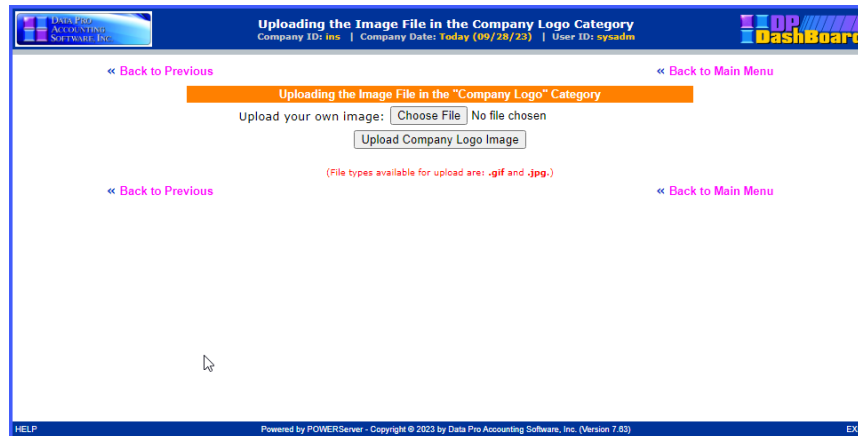
1. From the **DP/DashBoard/CRM Administration Menu** screen, select the **Setup Company Logo and Phone Numbers** menu option. The Company Logo and Phone Number Configuration screen displays.



To Replace the Company Logo Image:

This option allows you to replace the existing company logo that displays in the **DP/DashBoard/CRM** header throughout the program. Perform the following steps to replace your company logo.

1. From the Company Logo and Phone Numbers Configuration screen, <click> the **Replace Company Logo Image** option to select a new the image. The Uploading the Image File in the Company Logo Category screen displays.



2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

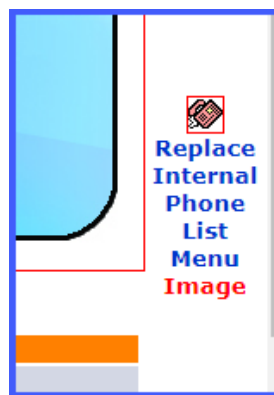
NOTE

Images must be in .jpg or .gif format, and not exceed 30 pixels in width.

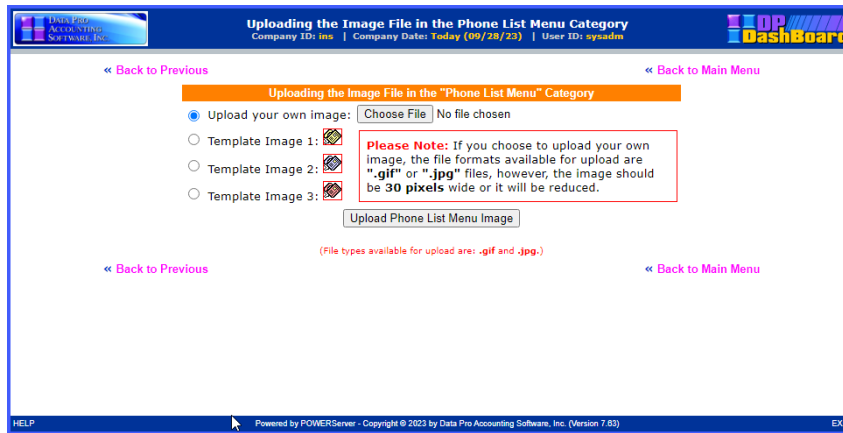
5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.
6. <Click> the **Upload Company Logo Image** button. The Upload Image Screen displays confirming the file was uploaded successfully.
7. <Click> the **Return to Main Menu** option. The Upload Image Screen closes. The new image is updated in the Company Logo and Phone Number Configuration screen and in the **DP/DashBoard/CRM Menu System** screen header that displays throughout the program.

To Replace the Internal Phone List Menu Image Icon:

This option allows you to replace the existing internal phone list image icon that displays in the **Maps and List>Internal Phone List** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to replace the internal phone list image icon.



1. From the Company Logo and Phone Numbers Configuration screen, <click> the **Replace Phone List Menu Image** option to select a new image icon. The Uploading the Image File in the Company Logo Category screen displays.



2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Choose File** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in .jpg or .gif format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The **Choose File** window closes and the selected path and file name are now displayed in the Upload your own image text box.
OR
6. <Click> the appropriate radio button to select one of the available **Template Images**.



7. <Click> the **Upload Phone List Menu Image** button. The Uploading File screen displays confirming the image was uploaded successfully.
8. <Click> the **Return to Main Menu** option. The Uploading File screen closes. The new image is updated in the Maps & Lists>Internal Phone List section of the **DP/DashBoard/CRM Menu System** screen.

To Add/Modify Company Address and Phone Numbers:

This option allows you to add/modify your company’s address (physical and/or mailing address) and contact information such as corporate, department, and support phone numbers as well as fax numbers. This company information displays at the top of the Internal Phone List screen when accessed from the **Maps & List>Internal Phone List** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to add/modify a company address and contact information.

1. From the Company Logo and Phone Numbers Configuration Screen, <enter> the desired address in the **Company Address** text window.
2. Enter the desired address in the **Company Address** text box.



3. Enter the desired contact information in the **Company Phone Numbers** text box.
4. <Click> the **Save Address and Phone Numbers** button. The Updating Company Address and Phone Numbers screen displays, confirming the new information has been updated. The screen closes and returns to the Company Logo and Phone Numbers Configuration screen.

Setup Available Companies

This configuration option allows you to assign a unique company identifier, usually an abbreviation of a company name. The Company ID is displayed in the **DP/DashBoard/CRM** main header to indicate the active company. Adding a new company affects Reports/Drilldown, Customer Support, and Custom Applications from the **DP/DashBoard/CRM Menu System** screen.

To Access the Setup Available Companies Screen

1. From the **DP/DashBoard/CRM Administration Menu** screen, select the **Setup Available Companies** menu option. The Company Configuration screen displays.



As companies are added, they are displayed in a numbered list including the following document details:

Line	Line number. System generated and automatically increments to the next highest number as companies are added.
Company Name	An alpha/numeric text string that consists of 40 characters that describe the company name. System generated for this screen based on the user-defined company name in the Company Configuration Screen>Add New Company option.
Company ID	An alpha/numeric text string that consists of (3) three characters that identifies the company. You cannot use one or two characters only. System generated for this screen based on the user-defined company ID in the Company Configuration Screen>Add New Company option.
Remove?	Hyperlink. Allows you to delete a company from the DP/DashBoard/CRM database. This option allows you to delete companies once they have been added to the list of companies in the Company Configuration screen. Removing a company will affect all functions throughout the DP/DashBoard/CRM system where selecting a company is possible.

To Add a Company:

This Configuration option allows you to add a new company to the **DP/DashBoard/CRM** Database. Once a company is added, it will become available for selection for the following Main Menu functions: Reports/Drilldown, Customer Support, and Custom Applications.

1. From the Company Configuration screen, <click> the **Add New Company** option to set up a new company. The Adding New Company screen displays.



2. Enter the user defined company identification in the **Company ID** text box. The Company ID is an alpha/numeric text string that consists of three characters. You cannot use one or two characters only.

NOTE

Consider making the Company ID an abbreviation of the actual company name so that it will be easily recognized. It must be a valid company that exists with the **Infinity POWER** programs already.

3. Enter the company name in the **Company Name** text box.
4. <Click> the **Save** button. A message displays confirming the company index has been updated. The window closes and returns to the Company Configuration Screen. The new company name and company ID displays in the Add New Company list.

To Modify a Company:

This option allows you to modify the properties set up for companies once they have been added to the list of items in the Company Configuration screen accessed when you select the Setup Available Companies configuration option.



1. In the Company Configuration screen, <click> the list item to be modified in the **Company Name** column. The Changing Company screen displays, indicating the line number of the item to be modified.



The following table describes the associated properties that can be modified for each company.

Item Type	Properties to Modify
Company ID	An alpha/numeric text string that consists of three characters that identifies the company.
Company Name	An alpha/numeric text string that consists of 40 characters that describes the company name.

2. Make the desired changes in the **Company ID** and **Company Name** text boxes.
3. <Click> the **Save Changes** button. A message confirms the company index has been updated.
4. <Click> the **Return to Menu** option. The window closes and returns to the Company Configuration screen, where the list of companies is now updated with the new changes. The modifications are also updated throughout all applicable sections of the DP/DashBoard/CRM program.

To Remove a Company:

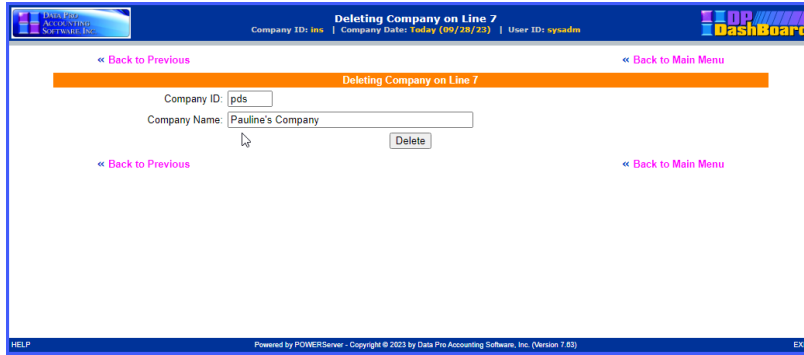
This option allows you to delete companies once they have been added to the list of companies in the Company Configuration screen.

NOTE

Removing a company will affect all functions throughout the DP/DashBoard/CRM system where selecting a company is possible.



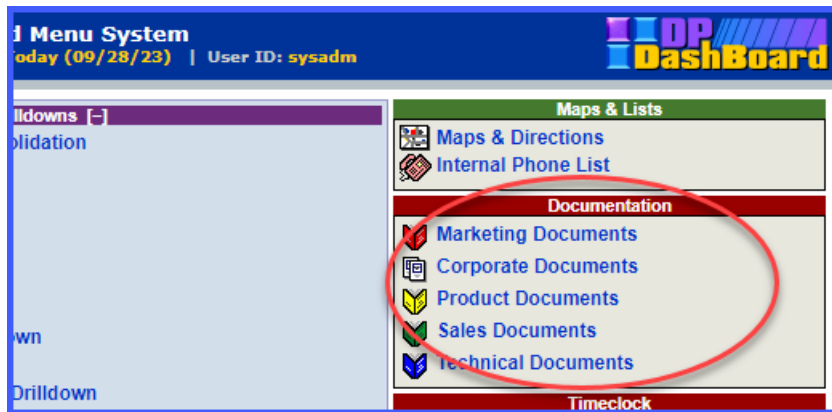
1. From the Company Configuration screen, scroll down the list of companies displayed and <click> the **Remove** option associated with the desired company to be removed. A message displays confirming the company will be removed from the menu.
2. <Click> the **OK** button to delete the company from the list of available companies. The Deleting Company screen displays, verifying the Company ID and Company Name to be deleted.



3. <Click> the **Delete** button to complete the remove function. A message displays confirming the company index has been updated. The window closes, and returns to the Company Configuration screen. The company has now been removed from the company list.
- OR
4. <Click> the **Cancel** button to terminate the Remove function without saving any changes.

Setup Documents

The Setup Documents options are designed to allow an Administrator to add, remove, and view documents, headings, and links to other websites that are displayed in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen. The following screen illustrates the section in the upper right-hand corner of the screen where these options are found once documents, heading, and links have been added.



From the **DP/DashBoard/CRM Administration Menu** screen, the following configurable documents options are available: Setup Marketing Documents, Setup Corporate Documents, Setup Support Documents, Setup Sales Documents, Setup Technical Documents, and Setup Quick References.



The main menu titles of all these categories are all configurable by a user with Administrator rights. Changes made to these options will be reflected in both the **DP/DashBoard/CRM Admin.** menu and in the Documentation section of the **DP/DashBoard/CRM Menu System** screen. As your company initiatives and styles evolve, you can update the main menu title and main menu image to reflect these changes. Adding new headings can categorize your growing list of links and documents into groups and subgroups so that they are more effectively organized and accessible.

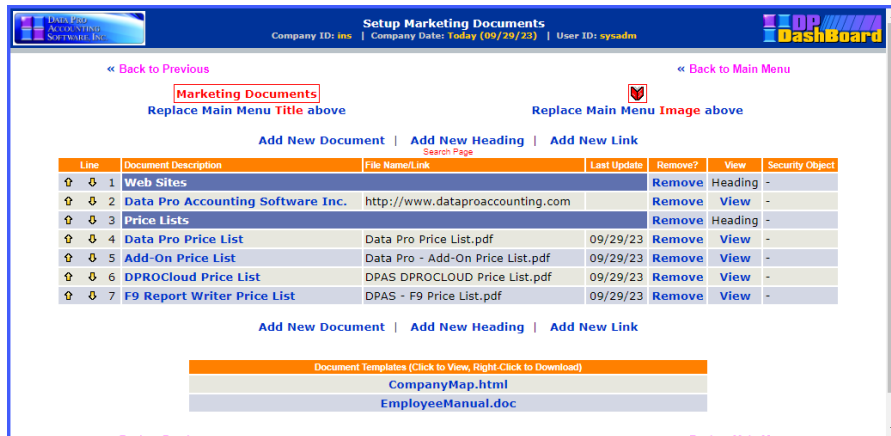
There are even full content document templates that come standard with **DP/DashBoard/CRM** (i.e. an Employee Manual and Company Map). Simply download these templates, customize the information for your company’s needs, then add the documents to your **Documentation** section so that your staff can access them whenever they need to!

The following table describes documents you may consider for each category.

Document Type	Sample Documents
Marketing Documents	Marketing documents or links may include product price lists, new version features, order forms, upgrade information, and company references, brochures, literature kits, etc.
Corporate Documents	Corporate documents or links may include company fact sheets, organizational charts, and quarterly results documents, tax returns, 941 reports, etc.
Product Documents	Support documents or links may include IT/MIS user request forms, troubleshooting bulletins, and software error logs, customer support ticket information, etc.
Sales Documents	Sales documents or links may include product feature documents, price lists, quarterly profit comparisons, new customer fact sheets, etc.
Technical Documents	Technical documents or links may include product price lists, new version features, order forms, upgrade information, and company references, etc.
Software Support	Software Support documents may include troubleshooting suggestions, helpful hints, lessons learned, short cut functions, voice mail setup procedures, etc. These are internal support items that can help all staff members.

To Access a Setup Documents Screen:

1. From the **DP/DashBoard/CRM Administration Menu** screen, select the desired **Setup Documents** menu option. The selected Setup Documents screen displays. The following sections will use the Setup Marketing Documents option as an example for all functions. All other Setup Documents options are identical.



As documents are added, they are displayed in a consecutively numbered list including the following document details:

Line	Line number. System generated and automatically increments to the next highest number as documents /links are added. You can <click> on a bullet and drag/drop within the column to rearrange the order items appear in the list.
Document Description	Hyperlink. Description of document that you enter when you select the Add New Document or Add New Link option. Clicking on an item in this column will open the Changing Documents Document window for the line item you selected. This window allows you to modify the description, source file, and security information for that document. This description also displays in the Documents screen in the DP/DashBoard/CRM Menu System screen (see the To Modify a Document/Heading/Link section).
File Name/Link	Name of file/link of new document. System generated based on the document file selected or path to the link provided when you select the Add New Document or Add New Link option in the Setup Marketing Documents screen.
Last Update	Date of most recent update to the file/link added. This column is automatically updated as files/links are revised.
Remove?	Hyperlink. Allows you to delete a document from the selected Documents screen on the DP/DashBoard/CRM Menu System screen (see the To Remove a Document/Heading/Link section).
View	Hyperlink. Opens the selected document for viewing. Headings added to the list of documents in the Setup Documents screen are labeled as such in the View Column.
Security Object	System generated. Displays the security permissions allocated to that particular document that were set up when the Add New Document or Add New Link option was selected. If security permissions are modified, this column will be automatically updated.

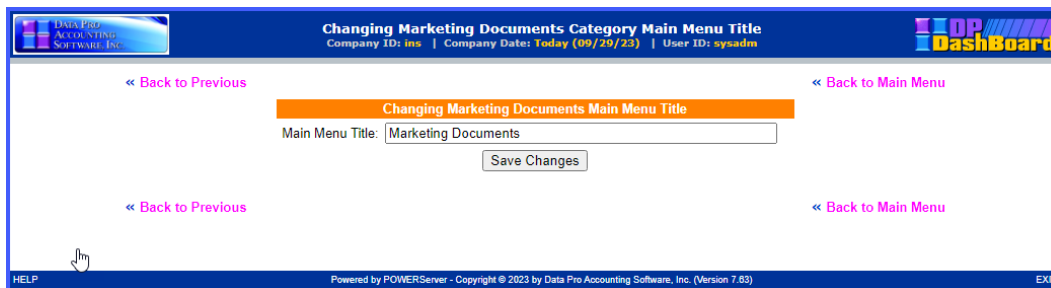
To Replace a Document Main Menu Title:

This option allows you to rename the main menu title as it appears in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen. By default, **DP/DashBoard/CRM** is configured with the following Documentation main menu titles: Marketing Documents, Corporate Documents, Support Documents, Sales Documents, Technical Documents, and Quick References Documents. Perhaps your company has a Public Relations Department but not a Marketing Department. Perform the following steps to rename the main menu title.

NOTE

Changing the main menu title will automatically update every screen/menu option that this name reflects.

1. From the Setup Documents screen that you wish to change the title, <click> the **Replace Main Menu Title** option to change the title as it displays in the Documentation section of the **DP/DashBoard/CRM Menu System** screen. The Changing Documents Main Menu Title screen displays.



2. Highlight the existing title in the **Main Menu Title** text box and <enter> the desired new title (ex: Public Relations).
3. <Click> the **Save Changes** button. The new title now displays on the selected Setup Documents screen and also in the appropriate Documentation section of the **DP/DashBoard/CRM Menu System** screen.

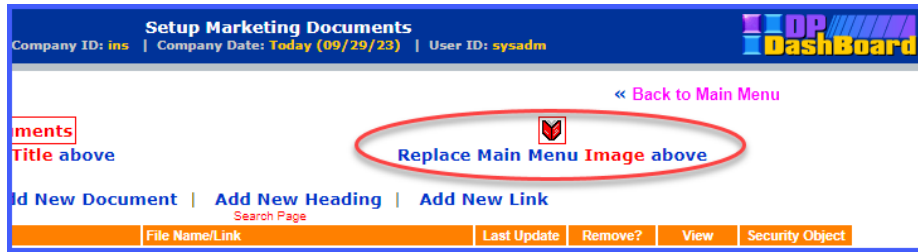


To Replace a Documents Main Menu Image Icon:

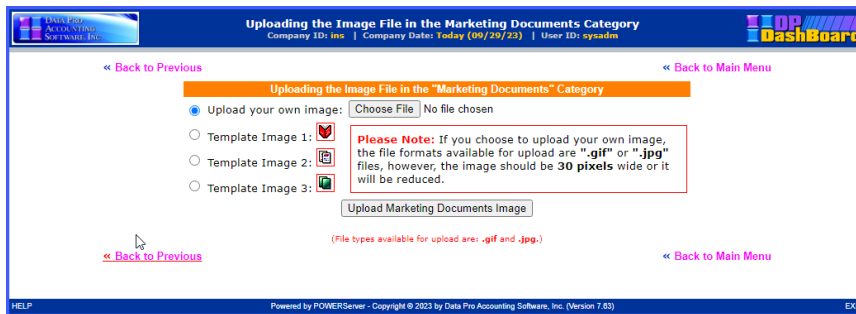
This option allows you to replace the existing image icon for this document category that displays in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to select a new image icon.

NOTE

Remember, you may need to work with your graphics program to correctly size the icon image to fit correctly on the **DP/DashBoard/CRM** screen.



1. From the selected Setup Documents screen, <click> the **Replace Main Menu Image above** option to select a new image icon. The Uploading the Image File in the “Documents Category” screen displays.

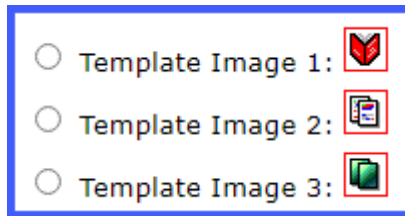


2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Choose File** button to select a path from your network. The **Choose File** window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or enter the exact filename of the image in the **File name** text box.

NOTE

Images must be in .jpg or .gif format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The **Choose File** window closes and the selected path and file name are now displayed in the Upload your own image text box.
- OR
6. <Click> the appropriate radio button to select one of the available **Template Images**.

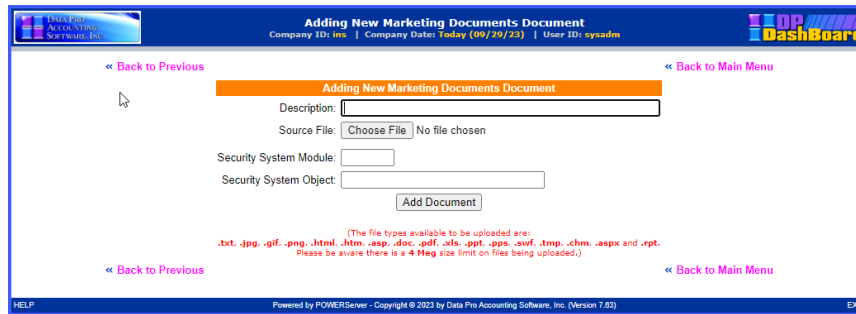


7. <Click> the **Upload Documents Image** button. The Uploading File screen displays.
8. <Click> the **Return to Main Menu** option. The Upload Image screen closes. The new image is updated in the selected Setup Documents screen and in the Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Documents Document:

This option allows you to add a new document that is accessible from the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen. Perform the following steps to add a new document.

1. From the selected Setup Documents screen, <click> the **Add New Document** option. The Adding New Documents Document screen displays.



2. <Enter> a description of the document in the **Description** text box.
3. In the **Source File** section, <click> the **Choose file** button. The Choose file window displays.
4. Select the appropriate folder from the **Look in** pull-down menu from the **Choose file** window.
5. Select the desired file or type in the exact filename of the document in the **File name** text box.

NOTE

The file types available to be uploaded are *.txt, .jpg, .gif, .html, .htm, .doc, .pdf, .xls, .csv, .ppt, .pps, .swf* and *.rpt*. Files cannot exceed 4 mb for upload. If documents are over 4 mb an error will display. You can alternatively upload a large document by making it a link on your network. Then in **DP/DashBoard/CRM** use the **Add New Link** option to add the document.

6. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*). If you want everyone to have access to this document, then leave this option blank.

NOTE

If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system's **Advanced Security Administrator** module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (*i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.*).

7. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The **Security System Module** and **Security System Object** categories must be entered exactly as they are defined in all **Infinity POWER** programs. The **Advanced Security Administrator** module lists out all security objects by module. **DP/DashBoard/CRM** security objects are defined in the **Security Objects Definitions Reference Manual** found in your **System Administrator User Manual**.

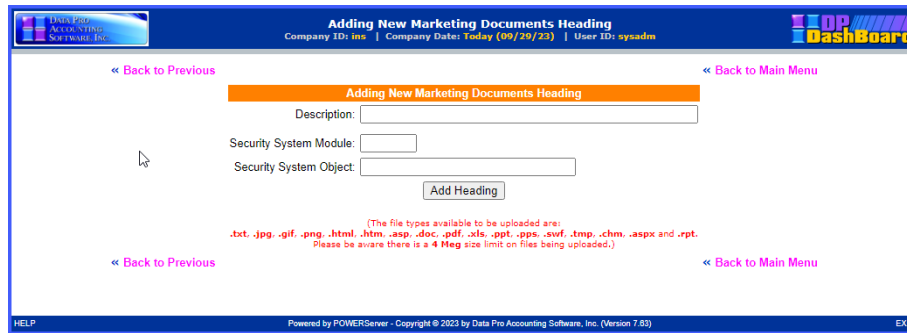
8. <Click> the **Add Document** button. The Adding Documents Document screen closes and the new document now displays in the selected Setup Documents screen and also in the Documentation>section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Documents Heading:

This option allows you to add a new heading that is accessible from the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen.

This is really useful if you want to categorize documents within a group (ex: Product Sheets). Perform the following steps to add a new heading.

1. From the selected Setup Documents screen, <click> the **Add New Heading** option. The Adding New Documents Heading screen displays.



2. <Enter> the New Heading in the **Description** text box.
3. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*). If you want everyone to have access to this document, then leave this option blank.

NOTE

If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system’s **Advanced Security Administrator** module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (*i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.*).

4. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The **Security System Module** and **Security System Object** categories must be entered exactly as they are defined in all **Infinity POWER** programs. The **Advanced Security Administrator** module lists out all security objects by module. **DP/DashBoard/CRM** security objects are defined in the *Security Objects Definitions Reference Manual* found in your *System Administrator User Manual*.

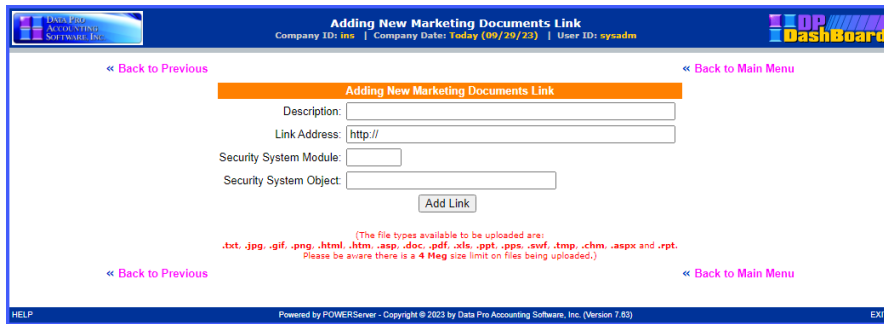
5. <Click> the **Add Heading** button. A message displays confirming the document index has been updated.
6. <Click> the **Return to Menu** option. The Adding New Documents Heading screen closes and the new heading now displays as a list item in the selected Setup Documents screen as well as in the Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To Add a New Documents Link:

This option allows you to add a new link to a website that is accessible from the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen.

Perform the following steps to add a new link.

1. From the Setup Documents screen, <click> the **Add New Link** option. The Adding New Documents Link screen displays.



2. <Enter> a description of the document in the **Description** text box.
3. <Enter> the path to the desired website in the **Link Address** text box.
4. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (*i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.*). If you want everyone to have access to this document, then leave this option blank.

NOTE

If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system’s **Advanced Security Administrator** module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (*i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.*).

5. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The **Security System Module** and **Security System Object** categories must be entered exactly as they are defined in all **Infinity POWER** programs. The **Advanced Security Administrator** module lists out all security objects by module. **DP/DashBoard/CRM** security objects are defined in the **Security Objects Definitions Reference Manual** found in your **System Administrator User Manual**.

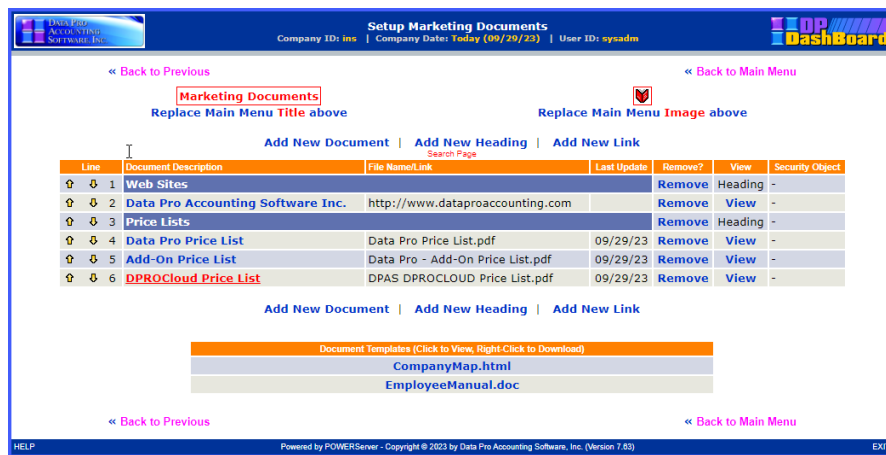
6. <Click> the **Add Link** button. The Adding New Document Link screen displays, confirming the document index has been updated. The window closes and returns to the selected Setup Documents screen. The new document link now displays in the list of documents and also in the selected Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To Modify a Documents Document/Heading/Link:

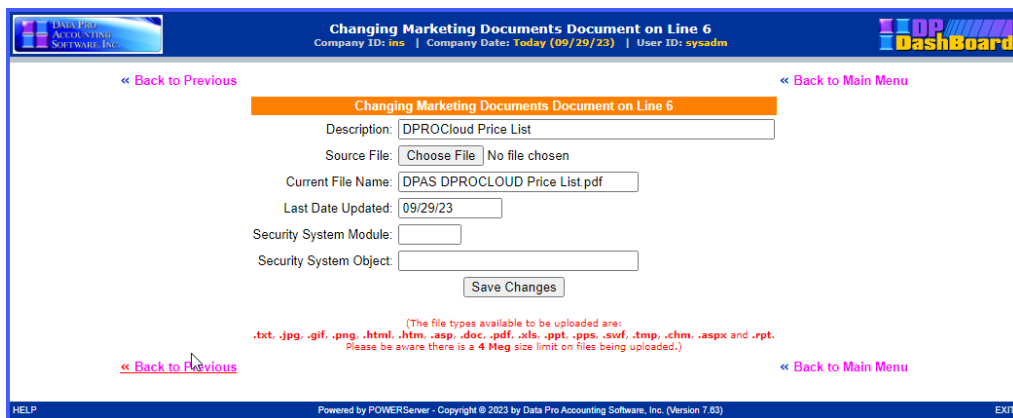
This option allows you to modify the properties set up for documents, headings, and links that have been added to the list of items in the Setup Documents screen and accessible in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen.

The following table describes the associated properties that can be modified for each of the item types listed in the Setup Documents screen.

Item Type	Properties to Modify
Document	Description, Source File, Security System Module, Security System Object. The current file name is displayed as well as the date of last update.
Heading	Description, Security System Module, Security System Object
Link	Description, Link Address, Security System Module, Security System Object.



1. In the Setup Documents screen, <click> the list item to be modified in the **Document Description** column. The Changing Documents Document/Heading/Link screen displays, indicating the line number of the item to be modified.

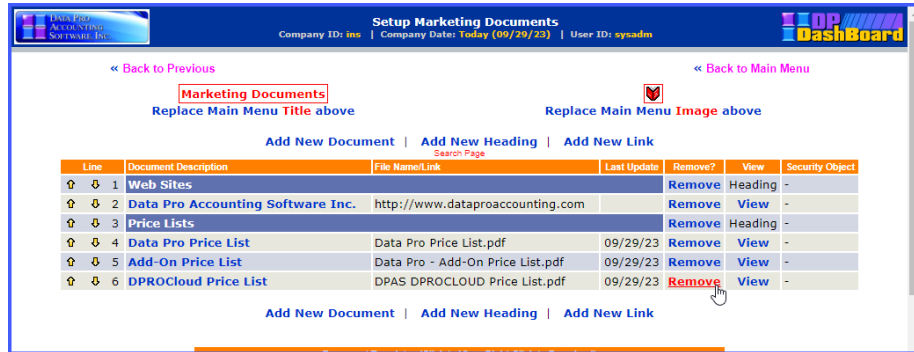


2. Depending on the item selected, make the desired changes in the applicable modifiable options.
3. <Click> the **Save Changes** button. A message confirms the document index has been updated.

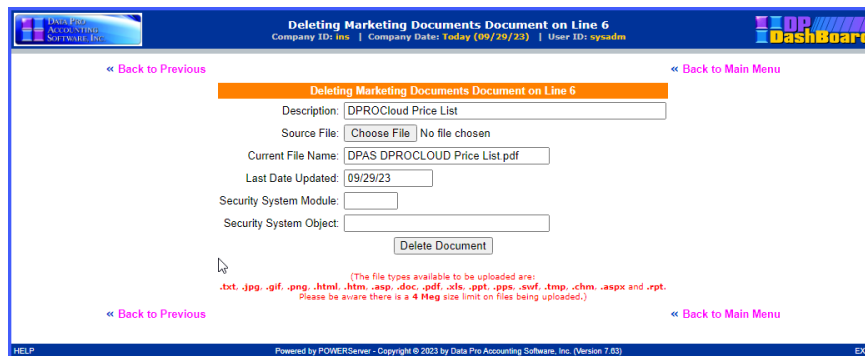
4. <Click> the **Return to Menu** option. The window closes and returns to the selected Setup Documents screen. The modifications are now updated in the document list in the selected Setup Documents screen and in the Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To Remove a Document/Heading/Link:

This option allows you to delete documents, headings, and links that have been added to the list of items in the Setup Documents screen and in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen.



1. In the Setup Documents screen, <click> the **Remove** option from the **Remove?** column for the item to be deleted. The Deleting Documents Document/Heading/Link screen displays, indicating the line number of the item to be deleted.



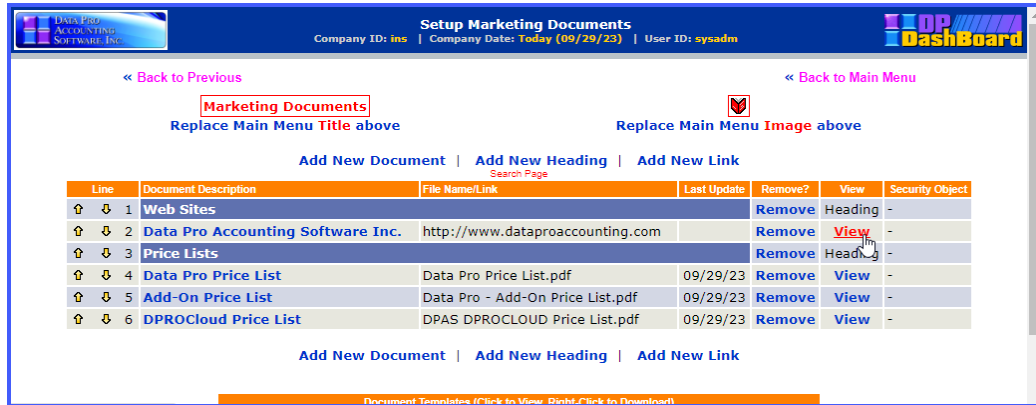
2. <Click> the **Delete Document/Heading/Link** button. A message confirms the document index has been updated.
3. <Click> the **Return to Menu** option. The window closes and returns to the selected Setup Documents screen. The selected item has been deleted from the document list in the selected Setup Documents screen and in the Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To View a Document/Heading/Link:

This option allows you to view documents and links that have been added to the list of items in the Setup Documents screen and in the **Documentation** section of the **DP/DashBoard/CRM Menu System** screen. Selecting the view function will automatically open the selected document or launch the website associated with the selected link.

NOTE

Headings can only be viewed by selecting a main menu title from the **Documentation** section of the DP/DashBoard/CRM Menu System screen.

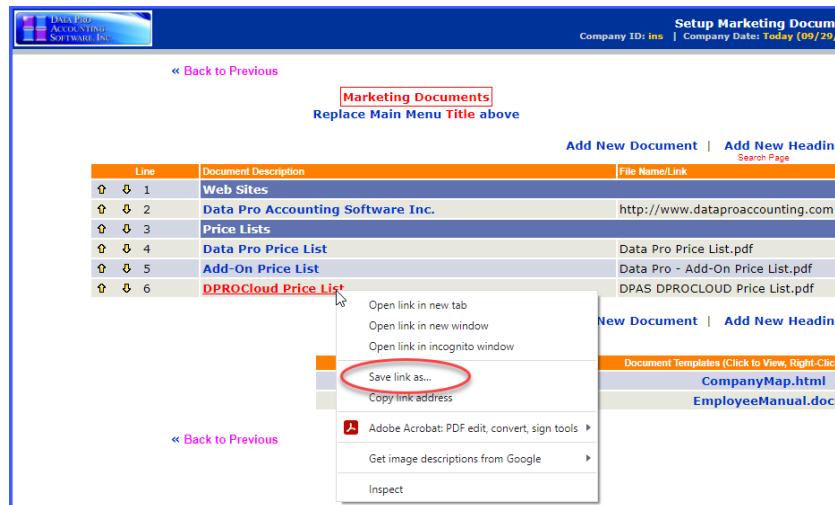


1. In the Setup Documents screen, <click> the **View** option from the **View** column for the item to be opened. The document or website automatically opens for viewing.

To Download a Document Template:

This function allows you to download documents that are listed in any of the Setup Documents screens or templates from the Document Templates section at the bottom of the screen.

- 1a. In the selected Setup Documents screen, <right-click> the desired document or template to be downloaded and select the **Save Link As** option. The Save As window displays.

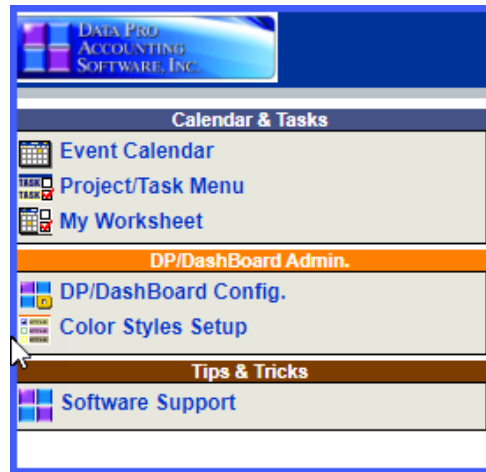


2. Select the desired directory to download the file into.
3. If desired, rename the document in the **File Name** menu.
4. If appropriate, change the file type in the **Save as type** menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

Color Styles Setup

This option allows you to customize the color settings used throughout the DP/DashBoard/CRM GUI (*Graphical User Interface*) screens.

The following screen illustrates the section on the left side of the screen where this option is displayed.



To Change the Color Style of the DP/DashBoard/CRM Screens:

1. On the left side of the DP/DashBoard/CRM Menu System screen, select the **Color Styles Setup** option from the DP/DashBoard/CRM Admin. section. The Site Management Utility screen displays.



2. <Click> the appropriate **Color Style** radio button to select the desired color scheme.
3. <Click> the **Change Color Scheme** button. The color scheme display box changes to the primary color selected.
4. <Click> the **Return to Main Menu** option to return to the DP/DashBoard/CRM Menu System screen. The selected color scheme is applied throughout the program.

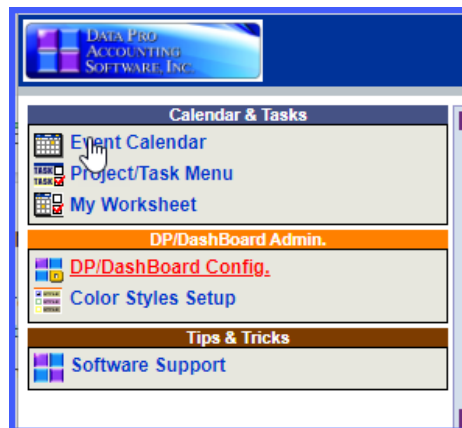
CALENDAR & TASKS

The **Calendar & Tasks** section of the **DP/DashBoard/CRM Menu System** screen consists of the Event Calendar, Project/Task Menu, and My Worksheet options. These are very powerful tools that are designed to allow for company wide use. This includes a single calendaring tool for a single office or even multiple offices as well as a Project Task Management system designed to allow you to keep track of a variety of things to be done, both personally and professionally. Configurable items in the section can be defined in the **DP/DashBoard/CRM Admin** section of the **DP/DashBoard/CRM Menu System** screen.

These features are accessible in the Calendar & Tasks section of the **DP/DashBoard/CRM Menu System** screen.

NOTE

<Clicking> the company logo in the left top corner of the screen from any of the Calendar & Tasks menu option screens, once you are inside these options, bring you back to the **DP/DashBoard/CRM Menu System** Screen. This function applies to this section only. The logo defaults to the Data Pro logo and should be replaced by your company's logo from the **DP/DashBoard/CRM Admin > DP/DashBoard/CRM Config** option of the Menu System screen.



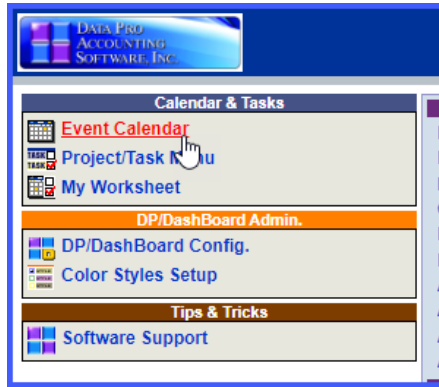
Event Calendar

The Event Calendar system is designed to allow each individual to maintain their own “**personal schedules**” on the system, in private, so that when other users are booking events that include them, the system has the ability to determine whether they are available or not to be included. Events are meetings, appointments, conference calls, To-Do's, demos and more!

NOTE

With the integration of the event triggering system, **DP/Auto**, a daily notification of the calendar events can be sent to specified e-mail addresses set up in **DP/DashBoard/CRM** by utilizing the “**calendaralerts**” script. See the **DP/Auto User Manual** for further details.

The following screen illustrates where the **Calendar & Tasks>Event Calendar** option is located on the **DP/DashBoard/CRM Menu System** screen.

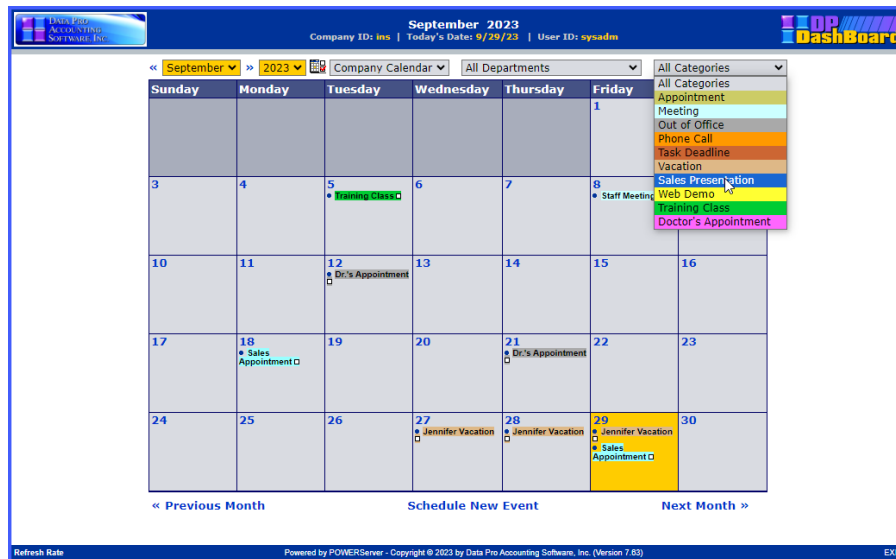


To Access the Calendar Screen:


1. On the left side of the **DP/DashBoard/CRM Menu System** screen, select the **Event Calendar** option from the **Calendar & Tasks** section. The Calendar screen displays defaulting to the current month using an additional browser window.

NOTE

You may resize this window to your preferences. This way you can go between the Calendar window and the main menu consistently by just clicking between browser sessions. You may use the **ALT TAB** key to easily switch between open sessions.



The following table describes the **Calendar** screen details.

<p>Month</p>	<p>Clicking this pull-down menu allows you to select the calendar month you would like to view. You can also click the << and >> to select the desired month.</p>
<p>Year</p>	<p>Clicking this pull-down menu allows you to select the desired calendar year month you would like to view.</p>
	<p>Opens the My Weekly Calendar and Task Worksheet Screen. From here you can add new tasks and then add them to the Event Calendar.</p>

Calendar	Clicking this pull-down menu toggles between My Calendar, and Corporate Calendar. My Calendar shows only your personal events. Corporate Calendar shows the entire corporate calendar plus any events you have made “public”.
Departments	Clicking this pull-down menu allows you to select All Departments or a specific department. Only the specified events will display on the calendar.
Categories	Clicking this pull-down menu allows you to select All Categories or a specific category of events to display on the calendar (e.g. appointments, phone calls, vacations, etc).
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.

To View a Specific Calendar:

1. From the top of the Calendar screen, click the << option to select the previous month or click the >> option to select the next month in the first pull-down menu. The selected month displays in full view and is listed in the pull-down menu.
1. 2. From the second pull-down menu, select the desired **Calendar Year**. The selected calendar year displays in full view and is listed in the pull-down menu.
2. 3. From the third pull-down menu, select the **Company Calendar** option to view the full corporate calendar or the **My Calendar** option to view only your personal calendar entries. The selected calendar displays in full view and is listed in the pull-down menu.
3. 4. From the fourth pull-down menu, select the desired **Department** to only view that department’s calendar entries. The selected department calendar displays in full view and is listed in the pull-down menu.
4. 5. From the fifth pull-down menu, select the desired **Category** to only view entries related to the specified category. The selected category entries display in full view and are listed in the pull-down menu and in the calendar below.

NOTE

These combinations of pull-down menus are a great way of isolating just the information you want to see at once. You may see everything combined or just one group.

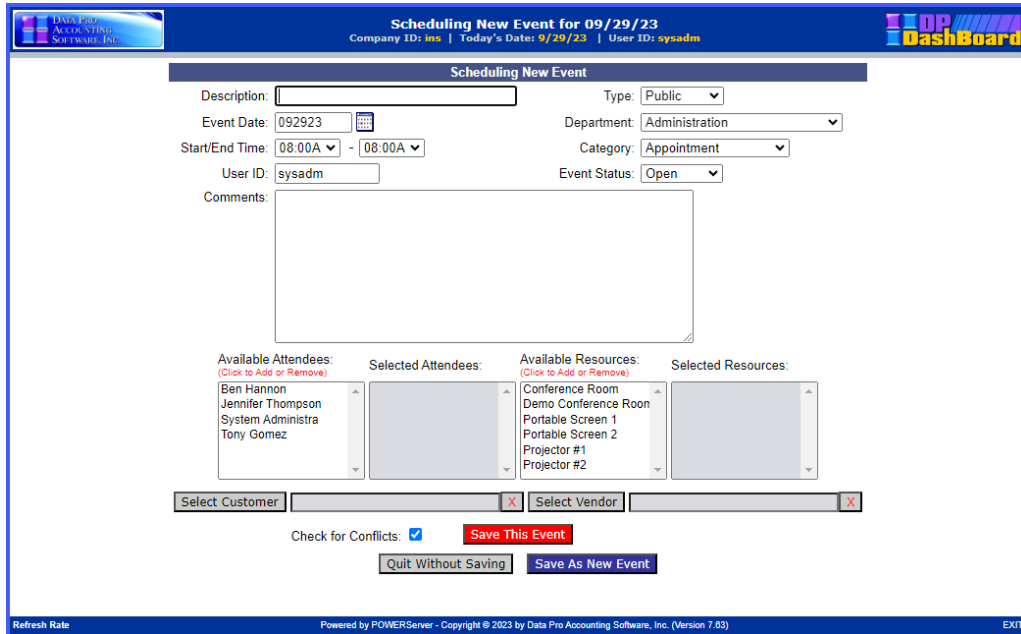
To Schedule a New Event:

This option allows you to schedule a new event to the calendar. User permissions determine which users can view certain events from the corporate calendar. When scheduling an event to the calendar, you can invite attendees such as internal staff, as well as prospects, customers, or vendors. All invitees will receive an e-mail confirmation of the event. You can also reserve resources such as conference rooms and media equipment.

NOTE

Events added to your personal calendar cannot be viewed by anyone but you.


5. 1. From the Calendar screen, click the **Schedule New Event** option. The Scheduling New Event screen displays.



The following table describes the **Scheduling New Event** screen details.

Description	Text box. Enter a description of the new event (i.e. appointment, meeting, conference call, etc.).
Event Date	Display box. Click the calendar icon to select the date of the event. Defaults to the current date.
Start/End Time	Pull-down menus. Displays the start/end time of the event. Defaults to 8:00 am for both time options. Increments in five-minute intervals.
User ID	Defaults to the User ID currently logged into the DP/DashBoard/CRM program.
Type	<p>Pull-down menu. The following options describe the event type:</p> <p>Public – Event is open to anyone with access to the calendar.</p> <p>Depart Only – Event is to be viewed only by those who have access to a specified department.</p> <p>Attendees – Viewed only by selected attendees. Attendees receive an invitation to the event via email. Accepting the event will update the attendees’ personal calendars.</p> <p>Private – Event can only be viewed by the user adding the event.</p>
Department	Pull-down menu. Options describe the department the event is associated with. Defaults to the department the current user is associated with.
Category	Pull-down menu. Options describe the category of the event (e.g. appointment, meeting, phone call). Defaults to Appointment. These categories may have specified colors to identify the event on the calendar. These colors can be configured under DP/DashBoard/CRM Config. Main Menu >Global Configuration Options .
Event Status	Pull-down menu. Describes the status of the event (e.g. Open, Complete, Cancelled).
Comments	Text Box. Enter any specific details about the event.

Available Attendees	Scroll list displaying all possible people available to select to attend the event.
Selected Attendees	Display box listing the selected event attendees from the Available Attendees display box. Avoids conflicts.
Available Resources	Scroll list displaying all available resources that can be reserved for the event (e.g. conference rooms, equipment, etc.) Avoids conflicts.
Selected Resources	Display box listing the resources selected for reservation from the Available Resources display box.
Select Customer	Clicking on this option opens the Select Customer for this Event screen. You can select a customer to add to the event by searching by customer number or name. Customers selected will be sent an e-mail confirmation for the event. You can <click> on the selected customer's name in the text box to display the Customer Information window.
Select Vendor	Clicking on this option opens the Select Vendor for this Event screen. You can select a vendor to add to the event by searching by vendor number or name. Vendors selected will be sent an e-mail confirmation for the event.
Check for Conflicts	Check box. Selecting this option will check each attendee's personal calendars and selected resources for conflicts for the specified event date and time.
Save This Event	Clicking this button saves the event and adds it to the specified calendar. Those with permissions can only view the event.
Quit Without Saving	Clicking this button closes the Schedule New Event screen without saving and returns to the Calendar screen.
Save As New Event	Clicking this button will duplicate the current event and add it to the specified calendar event as a new event. All the original options (attendees, resources, location, etc) are retained. This is very useful if the date is the only item that is different for an event. Those with permissions can only view the event.

6. Enter a description of the event in the **Description** text box.
7. <Click> the calendar icon  next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on << to change the month/year prior to the current date, or <click> >> to change the month/year after the current date. The calendar closes and the selected event date displays.
8. Selected the desired event options from the **Type, Department, Category,** and **Status** pull-down menus.
9. Enter a description of the event details in the **Comments** text box.
10. From the **Available Attendees** scroll list, click the desired attendees for the event. As attendees are selected, they are displayed in the Selected Attendees display box.
11. From the **Available Resources** scroll list, click the desired resources to be reserved for the event. As resources are selected, they are displayed in the Selected Resources display box.
12. If desired, select a **Customer** or **Vendor** to add to the event. Customers and/or vendors selected will receive an e-mail confirmation of the event.

NOTE

If resources are selected for an event, and the event is saved, the administrator for each selected resource will receive an e-mail notification of the event and the resources to be reserved.

13. Select the **Check for Conflicts** check box to automatically verify all selected attendees are available during the selected date/time of the event.
14. Click the **Save This Event** button or **Save As New Event** button to save the event and update the calendar. The Schedule New Event screen closes and returns to the Calendar screen displaying the new event.

NOTE

Remember, each time an event is scheduled or changed, all invited attendees receive an e-mail notice!

To Select a Customer for an Event:

This option allows you to select a customer to add to an event. Once a customer is selected, they are added to the event and will receive an e-mail notification with the event details. You can only select one customer per event.

15. From the Schedule New Event Screen, <click> on the **Select Customer** button. The Select Customer by Number or Name screen displays.
- 16.

17. Enter the partial or complete customer number in the **Customer Number** text box, then <click> the **Select** button. The Search Customer window displays listing all the possible results.
18. OR
19. Enter the partial or complete customer name in the **Customer Name** text box, then <click> the **Search** button. The Search Customer window displays listing all the possible results.

Customer ID	Name	Select	City, State Zip	Status
JONJ1	Sonia Jones Interior Design	SELECT	Clearwater, FL 33612	TPA

20. <Click> the **Select** button of the desired customer to be added to the event. The window closes and returns to the Scheduling New Event screen. The selected customer now displays in the Select Customer display box. To remove the selected customer, click the red X next to the displayed name.

NOTE

You can <click> on the selected customer’s name in the text box to display the Customer Information window.

The screenshot shows a scheduling interface with four columns: Available Attendees, Selected Attendees, Available Resources, and Selected Resources. Below these columns are buttons for 'Select Customer' and 'Select Vendor'. A 'Sonia Jones Interior Design' entry is shown with a red 'X' next to it. At the bottom, there are checkboxes for 'Check for Conflicts' (checked), a 'Save This Event' button, and 'Quit Without Saving' and 'Save As New Event' buttons.

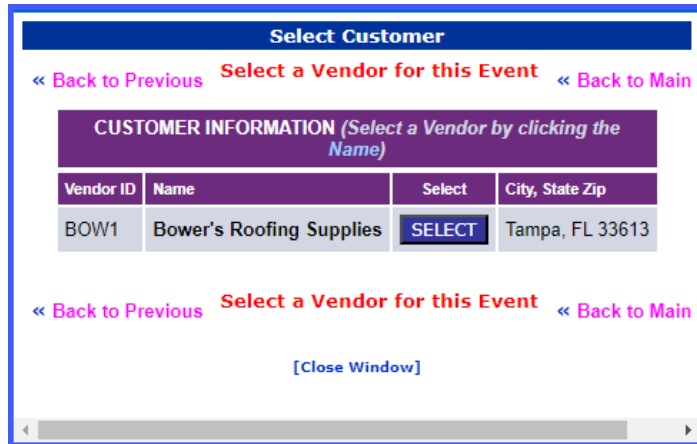
To Select a Vendor for an Event:

This option allows you to select a vendor to add to an event. Once a vendor is selected, they are added to the event and will receive an e-mail notification with the event details. You can only select one vendor per event.

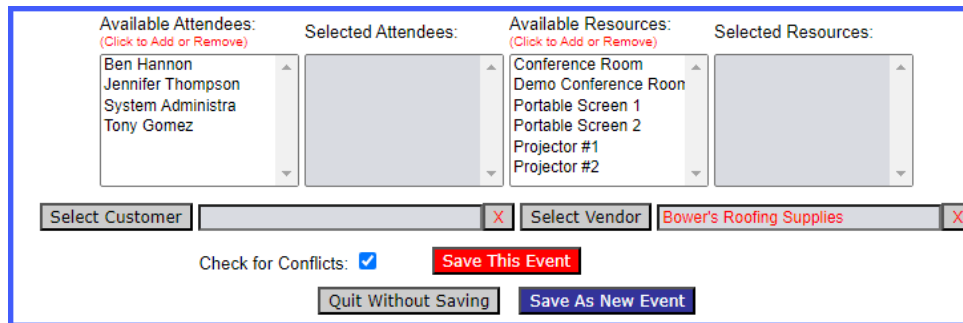
21. From the Schedule New Event Screen, <click> on the **Select Vendor** button. The Select Vendor by Number or Name screen displays.

The screenshot shows a window titled 'Select Customer'. It contains the following text and fields: 'Please enter the appropriate Vendor Number for this option.' followed by a 'Vendor Number' text box and a 'Select' button. Below that is 'Or Enter the Vendor's Name to search on' followed by a 'Vendor Name' text box and a 'Search' button. At the bottom is a '[Close Window]' button.

22. Enter the partial or complete vendor number in the **Vendor Number** text box, then <click> the **Select** button. The Search Vendor window displays listing all the possible results.
23. Enter the partial or complete vendor name in the **Vendor Name** text box, then <click> the **Search** button. The Search Vendor window displays listing all the possible results.



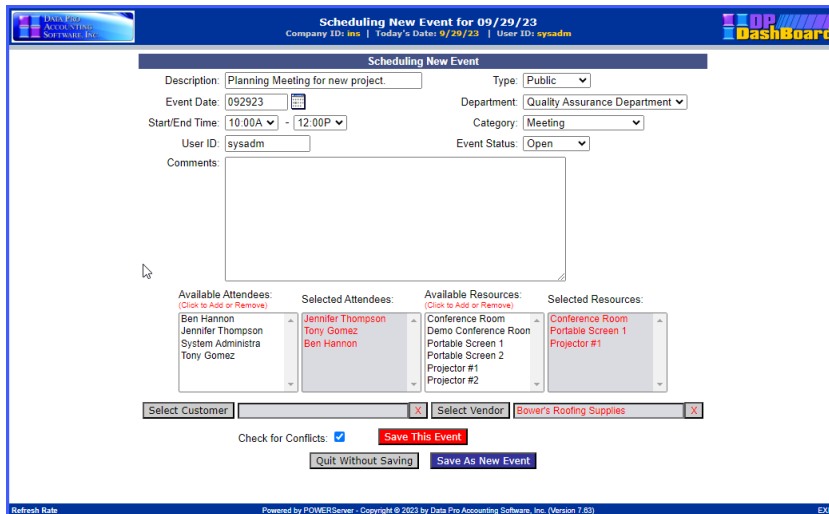
24. <Click> the **Select** button of the desired vendor to be added to the event. The window closes and returns to the Scheduling New Event screen. The selected vendor now displays in the Select Vendor display box. To remove the selected vendor, click the red X next to the displayed name.



To Change an Event:

This option allows you to modify an existing event that is displayed in the **Calendar** screen.

25. From the desired calendar (see To View a Specific Calendar), <click> on the **Event** to be modified. The Changing Event screen displays.



26. Make any desired changes to the event (see To Add a New Event). <Click> the **Save This Event** button or **Save As New Event** button to save any changes. The Change Event screen closes and returns to the Calendar screen displaying the modified event.

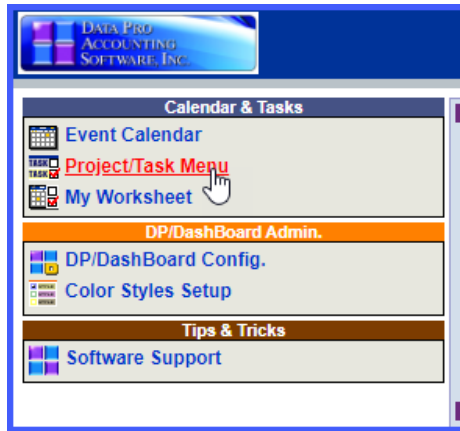
Project/Task Menu

This menu system option provides the capability to view tasks by category (i.e. **your personal tasks, tasks specific to a department, and all assigned tasks**). You can also view tasks by project. When tasks are all completed for a project, the project as a whole can be marked as complete, and removed from the list of tasks. From the **Project/Task Menu** option, you can also add new tasks, review all task details, and open the **My Weekly Calendar and Worksheet** screen.

NOTE

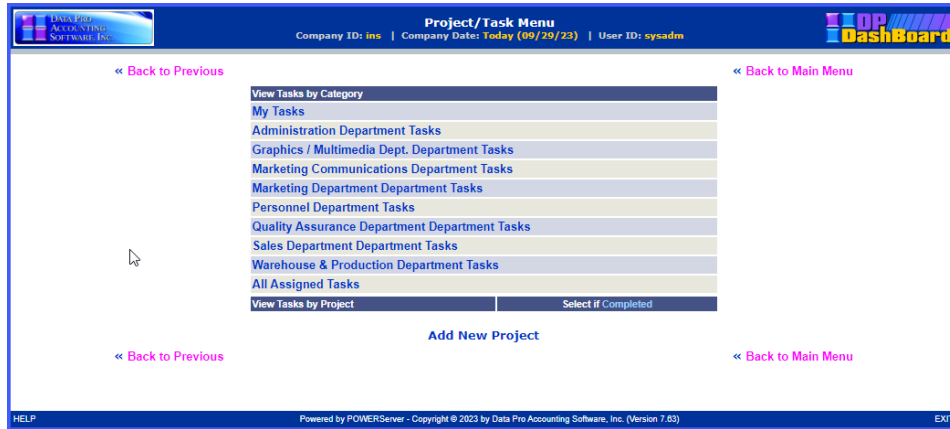
If you have integrated the **DP/AUTO** product, the “**CalendarAlerts**” script will send an email notification of upcoming calendar events and the “**CalendarWorksheet**” script will email a daily worksheet of calendar events and pending tasks.

The following screen illustrates where the **Calendar & Tasks>Project/Task Menu** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Access the Project/Task Menu Screen:

27. On the left side of the **DP/DashBoard/CRM Menu System** screen, select the **Project/Task Menu** option from the Calendar & Tasks section. The Project/Task Menu screen displays.



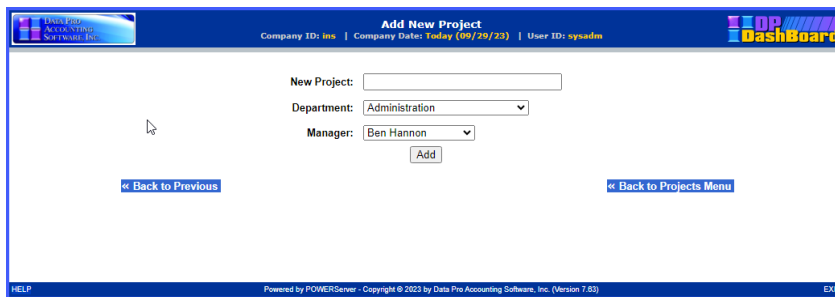
The following table describes the **Project/Task Menu** screen details.

View Tasks By Category	Lists all tasks entered from the Project/Task Manager by Category such as: My Tasks, Departments Tasks, and All Assigned Tasks.
View Tasks by Project	Lists all tasks by project headings.
Select if Completed	Selecting this option removes the task from Project/Task Menu screen.
Add New Project	Selection this option opens the Add New Project screen.

To Add a New Project:

This option allows you to add new projects to the **Project/Task Menu** function. When projects are added to the system, they can be associated to tasks when they are created. When a new project is added, it also displays in the **View Tasks by Project** section of the **Project/Task Menu** screen.

- From the Project/Task Menu screen, <click> the **Add New Project** option. The Add New Project screen displays.



- Enter the name of the project in the **New Project** text box.
- Select the department associated with the project from the **Department** pull-down menu.
- Select the manager assigned to the project from the **Manager** pull-down menu.
- <Click> the **Add** button. The Add New Project screen closes and returns to the Project/Task Menu screen. The new project is displayed in the View Tasks by Project Category section.

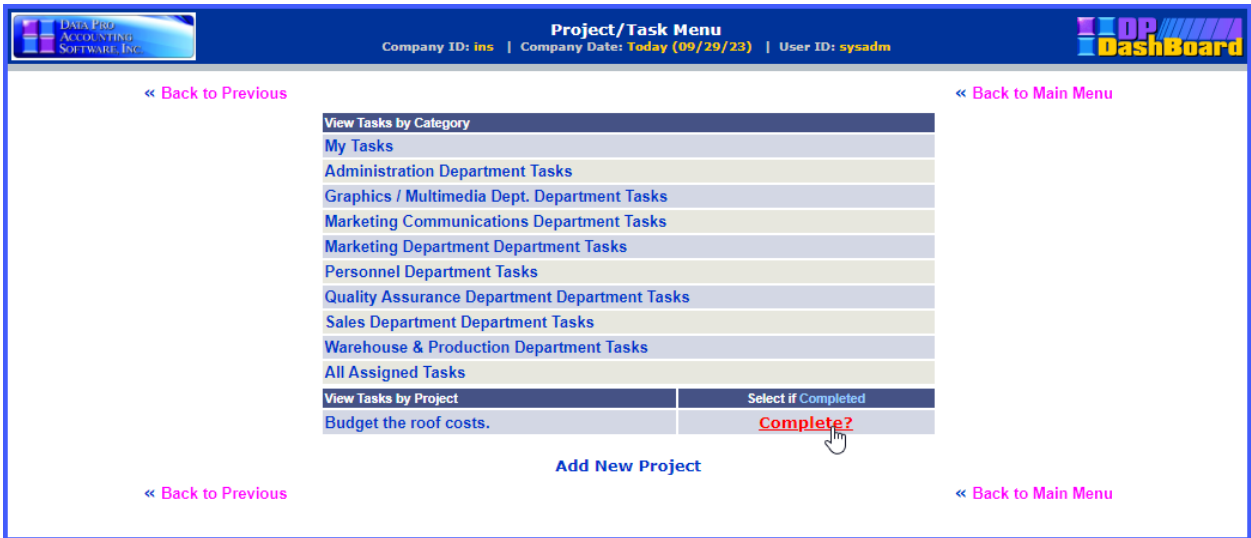
To Mark a Project as Completed:

This option allows you to mark a Project as complete. A project should only be marked complete if all the tasks related to that project are completed.

NOTE

Marking a project as complete removes the project from the Project/Task Menu screen.

- From the Project/Task Menu screen, <click> the **Complete?** option associated with the project you wish to mark as complete. A message displays confirming the selected project will be deleted from the system.

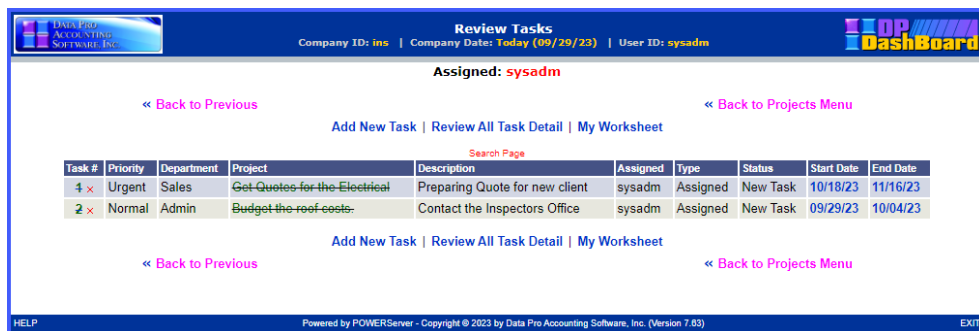


- Click the **OK** button. The project is now deleted from the Project/Task Menu screen and is no longer available as a project to associate with new tasks.

To View Tasks:

This option allows you to select a task by either category or by project name.

- From the Project/Task Menu screen, select the desired category or project name from either the **View Tasks by Category** or **View Tasks by Project** sections of the screen. The Review Tasks screen displays a listing of all tasks related to the selected category or project.



The following table describes the **Review Tasks** screen details.

Add New Task	Selecting this option opens the Add New Task screen.
Review All Task Detail	Selecting this option opens the Task Detail Report screen listing all details related to each task listed in the Review Tasks screen.
My Worksheet	Selecting this option opens the My Weekly Calendar and Task Worksheet screen. See the My Worksheet section.
Task #	Lists all tasks entered from the Project/Task Manager by Category such as: My Tasks, Departments Tasks, and All Assigned Tasks.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Department	Specifies the department assigned to the task.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.
Assigned	Specifies whom the task is assigned to.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Start Date	Lists the date the project commences.
End Date	Lists the date the project is expected to be completed.

36. <Click> the **Review All Task Detail** option to list all details for each task listed. The Task Detail Report screen displays listing details.

To Add a Task:


This option allows you to add a new task to your personal task list, or to a specific department. User permissions affect what tasks a user is able to view (i.e. Only users assigned to the Marketing Department can see tasks related to Marketing).

37. From the Review Tasks screen, click the **Add New Task** option. The Add/Change Task screen displays.

The following table describes the **Add/Change Task** screen details.

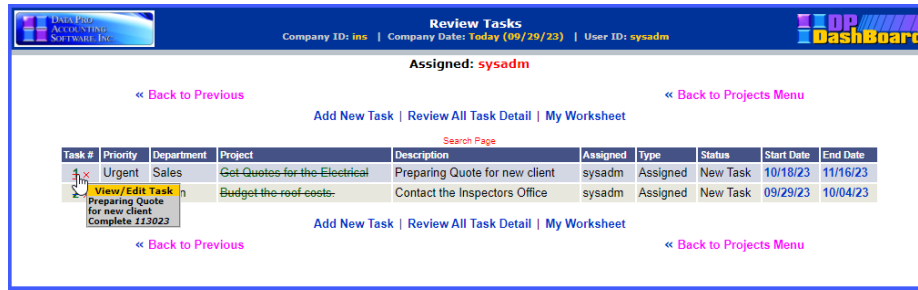
Assigned	Specifies whom the task is assigned to.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.
Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Start/End Date	Displays the selected date the project commences/ends.
Completion Date	Displays the date the task is completed. Entered at the end of the project.
Department	Specifies the department assigned to the task.
Details	Text box. Enter free form details about the task.
Comments	Text box. Enter any important comments about the task.
Save Task	Click this button to save the New Task selections. The new task displays in the My Weekly Calendar & Task Worksheet .

TIMESHEET SECTION	
Department	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu if a job.
Cost Code	This data item will only be used if you selected “ Job ” as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted.
Bill Description	If the option to allow “ <i>Entry of JC/TB Transaction Description</i> ” is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.
Hours Worked	Enter the number of hours worked for the specified employee.
From:/To:	If you have selected the option to enter hours as beginning and ending times, specify a time range. <Click> the Set Time button to calculate the number of total hours.

38. Select a user to assign to the task from the **Assigned** pull-down menu. Default is “**adminuser.**”
39. Select the priority of the task from the **Priority** pull-down menu. Default is Urgent.
40. Select the project associated with the task from the **Project** pull-down menu.
41. Enter a description of the task in the **Description** text box.
42. Select the project status from the **Status** pull-down menu. Default is New Task.
43. Select the task type from the **Type** pull-down menu. Default is Unassigned.
44. <Click> the calendar icons  next to the **Start/End Date** display box to open the calendar and select the desired start/end dates for the task. The calendar closes and the selected start/end dated display. Hint: <Click> on << to change the month or year prior to the current date, or <click> on >> to change the month or year after the current date.
45. Select the department associated with the task from the **Department** pull-down menu.
46. Enter specific information on the task in the **Details** text box.
47. Enter any necessary comments about the task in the **Comments** text box.
48. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the Review Tasks screen. The new task displays in the list of tasks.


To Change a Task:

This function allows you to edit a task entry from the Review Tasks screen. Changes made are immediately updated to the system.



49. From the Review Tasks screen, click the task number of the task you want to change in the **Task #** column. The Add/Change Task screen displays listing all the tasks associated with the category or project.
50. Make any desired changes to the task.
51. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the Review Tasks screen. The list of tasks is updated with the changes.

To Mark a Task Complete:

52. From the Review Tasks screen, click the task number of the task you want to mark as complete from the **Task #** column. The Add/Change Task screen displays.
53. <Click> the calendar icon  next to the **Completion Date** display box to select the date the task is completed. Hint: <Click> on << to change the month/year prior to the current date, or <click> >> to change the month/year after the current date.
54. <Click> the **Save Task** button. The calendar closes and returns to the Review Tasks screen. The task displays with a green line crossing through it to indicate it has been completed.


NOTE

This option can also be performed when adding a task for the first time (see the To Add a Task section).

To Remove a Task:

This option removes a selected task from the Review Tasks screen.



55. From the Review Tasks screen, <click> the  in the **Task #** column for the task you want to remove. A dialog box displays confirming the intent to delete the specified task.
56. <Click> the **OK** button in the dialog box to delete the task and return to the Project/Tasks Menu screen.
57. <Click> the **Cancel** button terminate the remove function. A dialog box displays, <click> the OK button to close the dialog box and return to the Review Tasks screen.

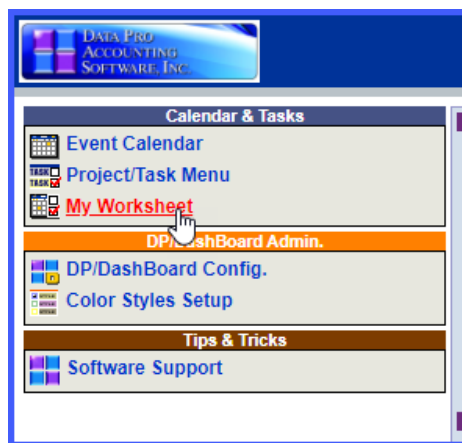
My Worksheet

This menu system option provides the capability to add, modify, and delete calendar events and add, modify, and remove tasks from your personal task list. User permissions determine what calendar events each user is allowed to view.

The following screen illustrates where the **Calendar & Tasks>My Worksheet** option is located on the **DP/DashBoard/CRM Menu System** screen.

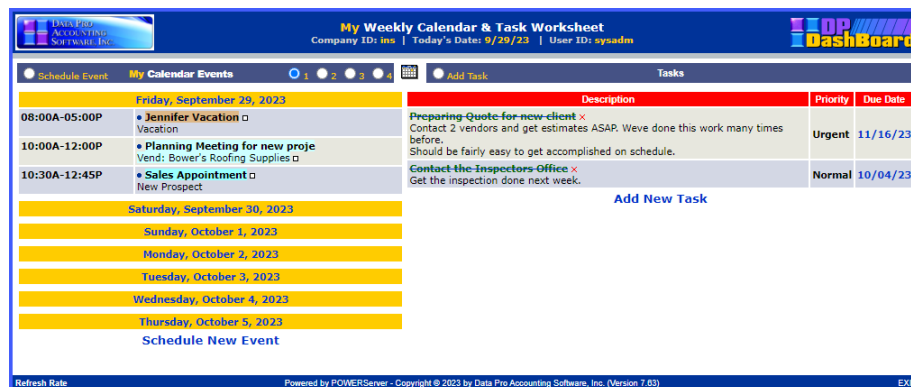
NOTE

With the integration of the event triggering system, **DP/Auto**, a daily notification of the calendar events and tasks assigned on the My Calendar Worksheet can be sent to specified e-mail addresses set up in **DP/DashBoard/CRM** by utilizing the “calendarworksheet script.” See the *DP/Auto User Manual* for further details.





To Access the My Worksheet Screen:

- On the left side of the **DP/DashBoard/CRM Menu System** screen, select the **My Worksheet** option from the **Calendar & Tasks** section. The My Weekly Calendar & Task Worksheet screen displays.



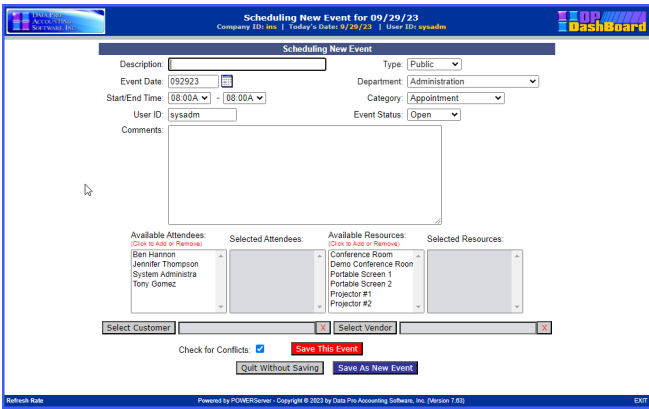
The following table describes the My Weekly Calendar & Task Worksheet screen details.

Calendar Section	
Schedule Event	Selecting this radio button opens the Scheduling New Event window. This option allows you to add an event to either your personal Event Calendar or the Company Calendar.
(My/All) Calendar Events	Toggles between My or All Calendar Events. Displays all calendar events for 1-4 weeks. Calendar Events can be rearranged by selecting the black dot next to the event description and dragging it onto the desired date.
	Opens the Event Calendar. Default is the company calendar view.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add an event to either your personal Event Calendar or the Company Calendar.
	Selecting one of these radio buttons displays calendar events for one to four weeks from the current week.
Task Section	
Add Task	Selecting this radio button opens the Add/Change Task window. This option allows you to add personal tasks. These tasks also display in the appropriate sections of the Project/Task Menu screen.
Description	Column heading. Describes the task and details.
Priority	Column heading. Describes the priority set for the task.
Due Date	Displays the due date of the task. <Click> on an item in this column to add that task to the Event Calendar.
Add New Task	Selecting this option opens the Add/Change Task window. This option allows you to add personal tasks. These tasks also display in the appropriate sections of the Project/Task Menu screen.

To Schedule a New Calendar Event from the My Worksheet Option:

This function allows you to add a calendar event from the My Weekly Calendar & Task Worksheet screen. Scheduling a calendar event from this screen also updates the Calendar screen when viewed from the Event Calendar option from the Calendar & Tasks section of the DP/DashBoard/CRM Menu System screen.

1. From the My Weekly Calendar & Task Worksheet screen, <click> on the **Schedule Event** radio button or the Schedule New Event option at the bottom of the screen. The Scheduling New Event window displays.




The following table describes the **Scheduling New Event** screen details.

Description	Text box. Enter a description of the new event (i.e. appointment, meeting, conference call, etc.).
Event Date	Display box. Click the calendar icon to select the date of the event. Defaults to the current date.
Start/End Time	Pull-down menus. Displays the start/end time of the event. Defaults to 8:00 am for both time options. Increments in five-minute intervals.
User ID	Defaults to the User ID currently logged into the DP/DashBoard/CRM program.
Type	<p>Pull-down menu. The following options describe the event type:</p> <p>Public – Event is open to anyone with access to the calendar.</p> <p>Depart Only – Event is to be viewed only by those who have access to a specified department.</p> <p>Attendees – Viewed only by selected attendees. Attendees receive an invitation to the event via email. Accepting the event will update the attendees’ personal calendars.</p> <p>Private – Event can only be viewed by the user adding the event.</p>
Department	Pull-down menu. Options describe the department the event is associated with. Defaults to the department the current user is associated with.
Category	Pull-down menu. Options describe the category of the event (e.g. appointment, meeting, phone call). Defaults to Appointment.
Event Status	Pull-down menu. Describes the status of the event (e.g. Open, Complete, Cancelled).
Comments	Text Box. Enter any specific details about the event.
Available Attendees	Scroll list displaying all possible people available to select to attend the event.
Selected Attendees	Display box listing the selected event attendees from the Available Attendees display box. Avoids conflicts.
Available Resources	Scroll list displaying all available resources that can be reserved for the event (e.g. conference rooms, equipment, etc.) Avoids conflicts.

Selected Resources	Display box listing the resources selected for reservation from the Available Resources display box.
Select Customer	Clicking on this option opens the Select Customer for this Event screen. You can select a customer to add to the event by searching by customer number or name. Customers selected will be sent an e-mail confirmation for the event. You can <click> on the selected customer's name in the text box to display the Customer Information window.
Select Vendor	Clicking on this option opens the Select Vendor for this Event screen. You can select a vendor to add to the event by searching by vendor number or name. Vendors selected will be sent an e-mail confirmation for the event.
Check for Conflicts	Check box. Selecting this option will check each attendee's personal calendars and selected resources for conflicts for the specified event date and time.
Save This Event	Clicking this button saves the event and adds it to the specified calendar. Those with permissions can only view the event.
Quit Without Saving	Clicking this button closes the Schedule New Event screen without saving and returns to the Calendar screen.
Save As New Event	Clicking this button will duplicate the current event and add it to the specified calendar event as a new event. All the original options (attendees, resources, location, etc) are retained. This is very useful if the date is the only item that is different for an event. Those with permissions can only view the event.

59. Enter a description of the event in the **Description** text box.

60. <Click> the calendar icon  next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on << to change the month/year prior to the current date, or <click> >> to change the month/year after the current date. The calendar closes and the selected event date displays.

61. Selected the desired event options from the **Type, Department, Category,** and **Status** pull-down menus.

62. Enter a description of the event details in the **Comments** text box.

63. From the **Available Attendees** scroll list, click the desired attendees for the event. As attendees are selected, they are displayed in the Selected Attendees display box.

64. From the **Available Resources** scroll list, click the desired resources to be reserved for the event. As resources are selected, they are displayed in the Selected Resources display box.

65. If desired, select a **Customer** or **Vendor** to add to the event. Customers and/or vendors selected will receive an e-mail confirmation of the event.

NOTE

If resources are selected for an event, and the event is saved, the administrator for each selected resource will receive an e-mail notification of the event and the resources to be reserved.

66. Select the **Check for Conflicts** check box to automatically verify all selected attendees are available during the selected date/time of the event.

67. Click the **Save This Event** button or **Save As New Event** button to save the event and update the calendar. The Schedule New Event screen closes and returns to the Calendar screen displaying the new event.

NOTE

Remember, each time an event is scheduled or changed, all invited attendees receive an e-mail notice!

To Change a Calendar Event from the My Worksheet Option:

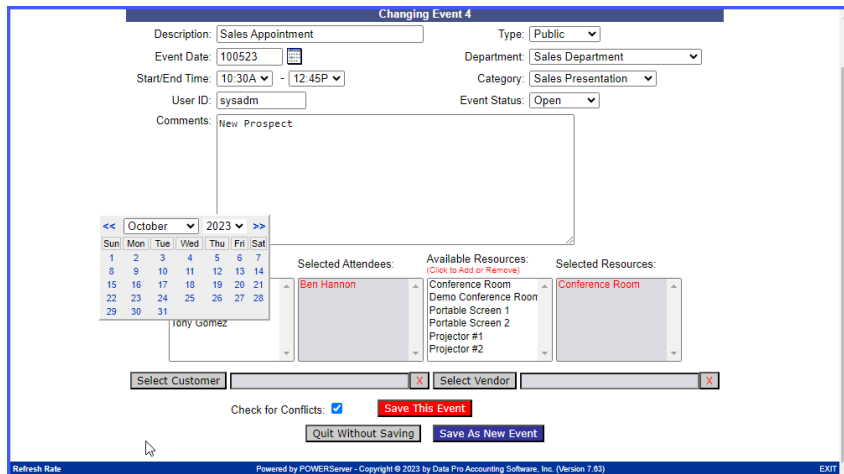
This function allows you to edit a calendar event from the My Weekly Calendar & Tasks Worksheet screen. Changes to calendar events listed from this screen are also updated in the Event Calendar.



- 68. From the My Weekly Calendar & Task Worksheet screen, <click> the **event** to be changed from the list of calendars events. The Changing Event window displays.

NOTE

See To View Weekly Calendar Events from the My Worksheet Option for instructions on how to display calendar events.

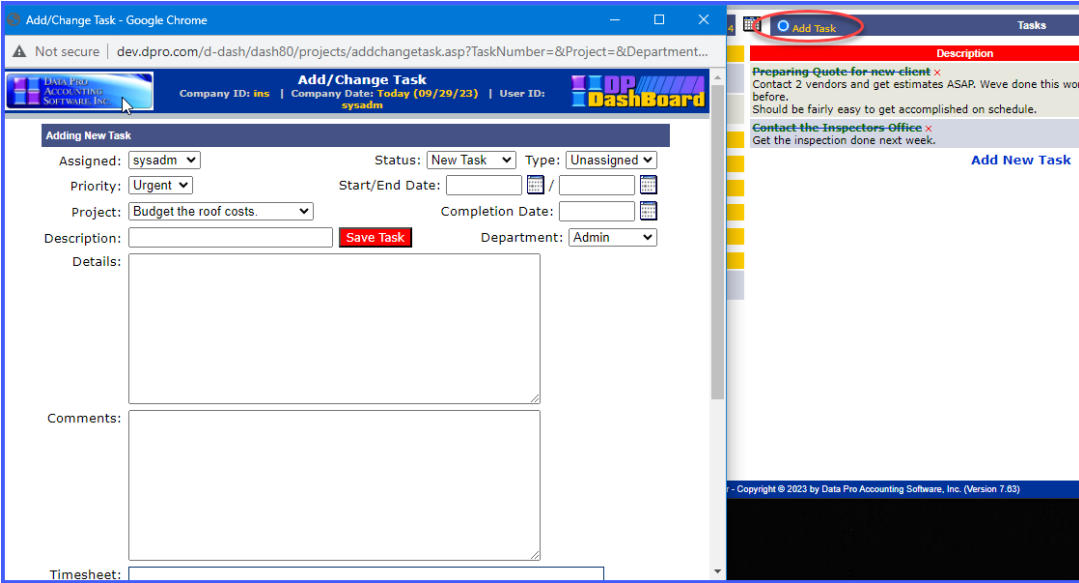


- 69. Make any desired changes to the event (see the To Add a Calendar Event from the My Worksheet option for screen details).

70. <Click> the **Save This Event** button or **Save As New Event** button to save any changes. The Change Event screen closes and returns to the My Weekly Calendar & Task screen displaying the modified event.

To Add a New Task from the My Worksheet Option:


71. From the My Weekly Calendar & Task Worksheet screen, <click> on the **Add Task** radio button or the **Add New Task** option at the bottom of the screen. The Add/Change Task window displays.



The following table describes the **Add/Change Task** window details.

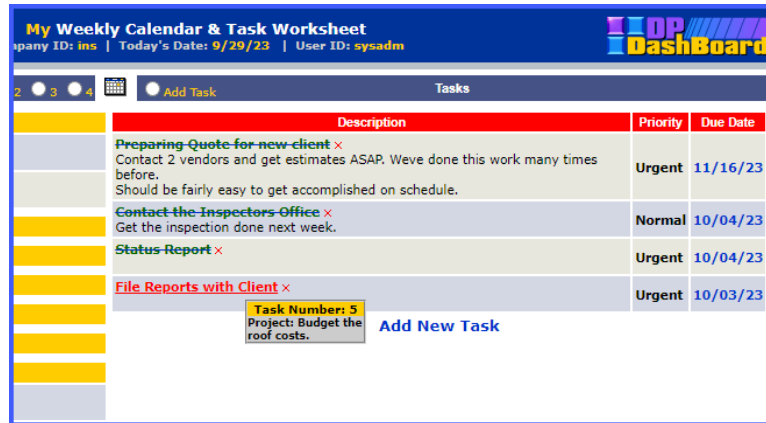
Assigned	Specifies whom the task is assigned to.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.
Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Start/End Date	Displays the selected date the project commences/ends.
Completion Date	Displays the date the task is completed.
Department	Specifies the department assigned to the task.
Details	Text box. Enter details about the task.
Comments	Text box. Enter any important comments about the task.
Save Task	Click this button to save the New Task selections. The new task displays in the My Weekly Calendar & Task Worksheet .

TIMESHEET SECTION	
Department	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu if a job.
Cost Code	This data item will only be used if you selected “ Job ” as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted.
Bill Description	If the option to allow “ <i>Entry of JC/TB Transaction Description</i> ” is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.
Hours Worked	Enter the number of hours worked for the specified employee.
Change Timesheet	Click the Change Timesheet button to make any modifications to the current timesheet.

72. Select a user to assign to the task from the **Assigned** pull-down menu. Default is adminuser.
73. Select the priority of the task from the **Priority** pull-down menu. Default is Urgent.
74. Select the project associated with the task from the **Project** pull-down menu.
75. Enter a description of the task in the **Description** text box.
76. Select the project status from the **Status** pull-down menu. Default is New Task.
77. Select the task type from the **Type** pull-down menu. Default is Unassigned.
78. <Click> the icons  next to the **Start/End Date** display box to open the calendar and select the desired start/end dates for the task. The calendar closes and the selected start/end dated display. Hint: <Click> on << to change the month or year prior to the current date, or <click> on >> to change the month or year after the current date.
79. Select the department associated with the task from the **Department** pull-down menu.
80. Enter specific information on the task in the **Details** text box.
81. Enter any necessary comments about the task in the **Comments** text box.
82. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the Review Tasks screen. The new task displays in the list of tasks.

To Change a Task from the My Worksheet Option:

This function allows you to edit a task entry from the My Weekly Calendar & Tasks Worksheet screen. Changes to tasks listed from this screen are also updated in the Project/Task Menu Screen.



83. From the My Weekly Calendar & Task Worksheet screen, click the **task** you want to change in the Description column. The Add/Change Task window displays.
84. Make any desired changes to the task.
85. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the My Weekly Calendar & Task Worksheet screen. The task is updated with the changes.

NOTE

<Click> on a task’s due date to add that task to the Event Calendar.

To Mark a Task Complete from the My Worksheet Option:

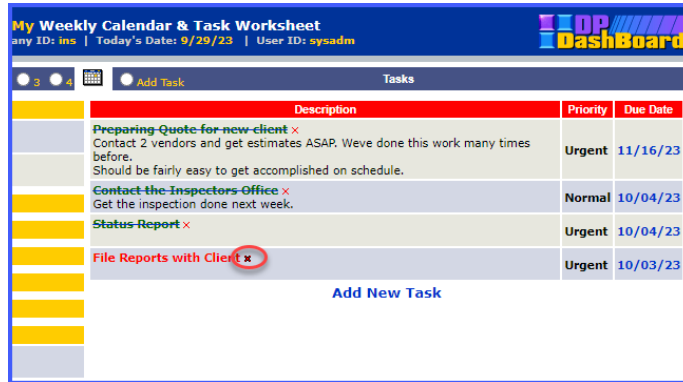
86. From the My Weekly Calendar & Task Worksheet screen, click the task you want to change in the **Description** column. The Add/Change Task window displays.
87. <Click> the icon next to the **Completion Date** display box to select the date the task is completed. Hint: <Click> on << to change the month/year prior to the current date, or <click> >> to change the month/year after the current date.
88. <Click> the **Save** button. The calendar closes and returns to the Review Tasks screen. The task displays with a green line crossing through it to indicate it has been completed.


NOTE

This option can also be performed when adding a task for the first time (see the To Add a Task section).

To Remove a Task from the My Worksheet Option:

This function allows you to remove a task entry from the My Weekly Calendar & Tasks Worksheet screen. Changes to tasks listed from this screen are also updated in the Project/Task Menu Screen.




89. From the My Weekly Calendar & Task Worksheet screen, <click> the  in the **Task #** column for the task you want to remove. A dialog box displays confirming the intent to delete the specified task.
90. <Click> the **OK** button in the dialog box to delete the task and return to the Project/Tasks Menu screen.
91. OR
92. <Click> the **Cancel** button terminate the remove function. A dialog box displays, <click> the **OK** button to close the dialog box and return to the Review Tasks screen.

To View Weekly Calendar Events from the My Worksheet Option:

93. From the My Weekly Calendar & Task Worksheet screen, <click> on the **Calendar Events** toggle to select either My Calendar Events or All Calendar Events.
94. <Click> the **1, 2, 3,** or **4** radio button to display calendar events for the current week to four weeks ahead. The list of calendar events displayed expands depending on how many weeks are selected.



95. <Click> the  icon at the top of the screen to open the Calendar screen. The calendar displays in the current month defaulting to the company calendar view (see the Event Calendar section for all functions related to this screen).

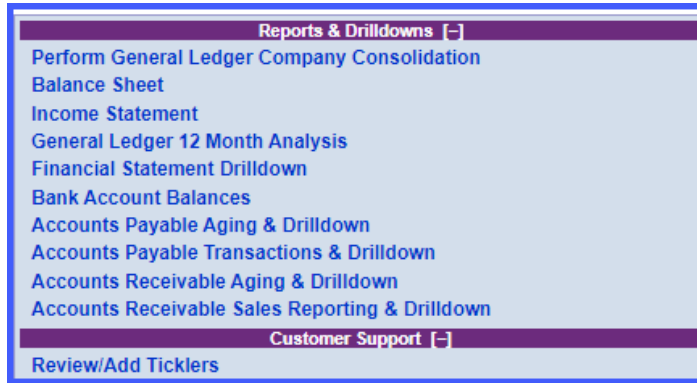
REPORTS AND DRILLDOWNS

The Reports and Drilldown menu options from the **DP/DashBoard/CRM Menu System** screen, allow you to access Report functions and Drilldown capabilities, based on the **Infinity POWER** accounting modules installed. You must have the following **Infinity POWER** modules installed for all **DP/DashBoard/CRM** features to be accessible: General Ledger (**GL**), Accounts Payable (**AP**), Accounts Received (**AR**), Check Reconciliation (**CR**), and Customer Support Management (**SD**).

NOTE

If these modules are not installed, these features will not be available in the **DP/DashBoard/CRM** application. Although the **Customer Support Management** module is included as part of the **DP/DashBoard/CRM**, it does require the **Accounts Receivable** module to take full advantage of this system.

The special reporting features are accessible in the **Reports & Drilldowns** section of the **DP/DashBoard/CRM Menu System** screen.



Perform General Ledger Company Consolidation

This option allows you to combine several companies, at varying percentages of ownership, into one Consolidation Entity so that you can run various reports. For example, your company purchases **35%** of another company. You will be maintaining the records of this subsidiary as well as your parent company. In order to give a complete financial picture to your Board of Directors, the subsidiary's financial statements must be combined with the parent company's financial statements. Simply set up a consolidation entity in the Windows GUI, or Windows character-based version of the **Infinity POWER G/L** module first, which will consolidate **100%** of the parent company's financial statements with **35%** of the subsidiaries.

Keep in mind, that all companies that are being consolidated must have the same Month of Year End and a consistent Chart of Accounts. Otherwise, this could cause information to be distorted or be inaccurate.

NOTE

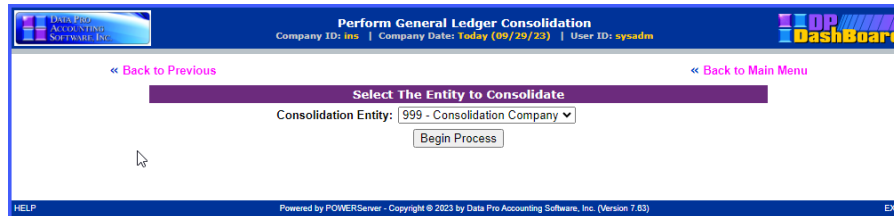
The Consolidation Entity must already be set up in the **Infinity POWER General Ledger** application to perform this option.

The following screen illustrates where the **Reports & Drilldowns>Perform General Ledger Company Consolidation** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Consolidate an Entity:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System Window, select the **Perform General Ledger Company Consolidation** option from the Reports & Drilldowns section. The Perform General Ledger Consolidation screen displays.



2. Select the desired company from the **Consolidation Entity:** pull-down menu. Since there can be a wide variety of choices, this is a pull-down menu list.
3. <Click> the **Begin Process** button. This process may take several minutes and the screen may clear while the program is performing the consolidation. When the consolidation is finished, a message displays confirming the consolidation is complete. The system displays when each company is processed.

NOTE

If a company is not found, a message displays indicating that this company is not included in the consolidation.

4. <Click> the **Return to Menu** option. The screen closes and returns to the **DP/DashBoard/CRM Menu System** screen.

Balance Sheet

This option prints a Balance Sheet in the format specified in the **Setup Financial Statements** option in the **Infinity POWER General Ledger (G/L)** module. The Balance Sheet is a statement of your company’s financial position, a snapshot of your business at a given moment in time. It lists your assets, your liabilities, and the difference between the two, which is your net worth. The accounting equation (*assets = liabilities + owner's equity*) is the basis for the Balance Sheet.

The Balance Sheet is typically printed after all adjusting entries made in the general journal entries have been posted to the general ledger, accounts have been footed to arrive at the period end totals, and an adjusted trial balance is prepared from the general ledger amounts. However, it can also be used as an on-going daily barometer for current cash balances and much more.

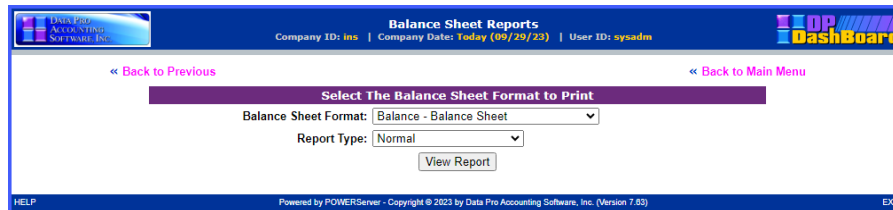
Once all information is posted to the General Ledger, the data is immediately available for printing all financial reports (such as the Balance Sheet).

The following screen illustrates where the **Reports & Drilldowns>Balance Sheet** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display a Balance Sheet Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System screen, select the **Balance Sheet** option from the Reports & Drilldowns section. The Balance Sheet Reports screen displays.



Balance Sheet report formats available are:

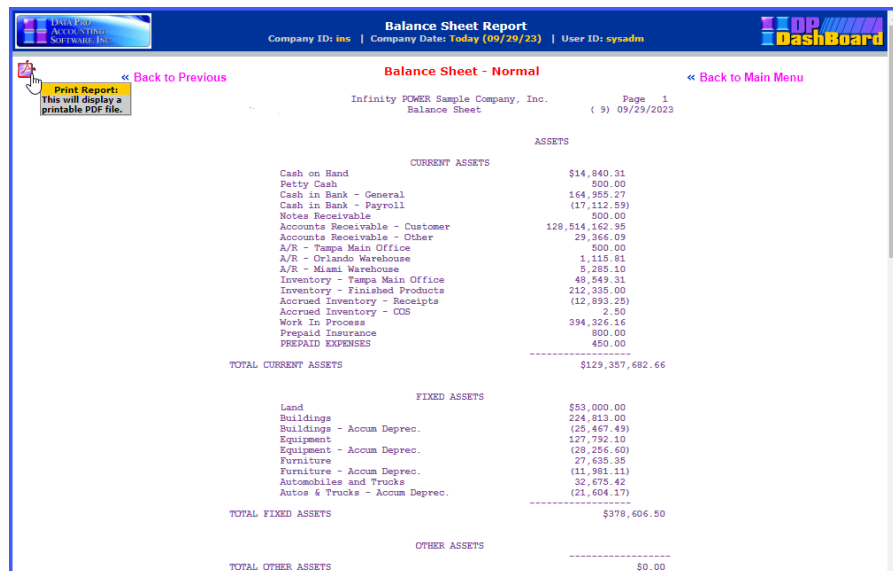
<p>Normal</p>	<p>Prints a Balance Sheet in standard format (two pages). The exact way the report is presented and printed is controlled entirely by the user in setting up Financial Statement Maintenance in the Infinity POWER General Ledger module. This normally includes Asset accounts on page one of the report and all Liabilities and Owner's Equity accounts on page two.</p>
<p>Budget Comparison</p>	<p>Prints a Balance Sheet that includes any budgeted numbers setup in the “SetUp Accounts” option when configuring your Chart of Accounts or the option to setup or enter change budgets, in the Infinity POWER General Ledger module. The report will compare the budgeted numbers against the actual and print any variance between the two numbers. Any over budget amounts will appear as a positive number; under-budget as a negative number.</p>
<p>Comparative Year</p>	<p>Prints a Balance Sheet with two printed columns of information. The first column reflects the current year's information as of the system date. This information is identical to printing the normal Balance Sheet. The second column reflects the prior year's information configured in the “SetUp Accounts” option in the Infinity POWER General Ledger module.</p>

<p>Comparative Month/Year</p>	<p>Prints a Balance Sheet that compares the current month's actual account balances with both the prior month's actual account balances and the prior year's actual account balances for the same month.</p>
<p>6 Month Trend</p>	<p>Prints a Balance Sheet that compares the current month's actual account balances with the previous five (5) month's actual account balances, even if the previous months occurred in a prior year. To run this version of the report, you must have data files in the prior year, if the date range selected crosses back into a prior year. Otherwise, a warning displays and the report will not run. If you do not desire to create prior year's data files, simply run the report with the system date set to the sixth fiscal period of the year or higher.</p>

2. Select the desired Balance Sheet from the **Balance Sheet Format:** pull-down menu.
3. Select the desired report type from the **Report Type:** pull-down menu. The report type options are pre-defined based on the configuration defined in the **Infinity POWER General Ledger** module.
4. <Click> the **View Report** button. The Balance Sheet Report screen displays containing the specified report information.

NOTE

The Run Date and Time information appearing at the top half of the report may be turned ON or OFF in the master configuration.



NOTE

<Click> on the PDF icon in the top left of the report to display a printable PDF version of the report.

5. <Click> the **<<Back to Previous** option to request another report or the **<<Back to Main Menu** option to return to the **DP/DashBoard/CRM Menu System** screen.

Income Statement

This option prints an Income Statement in the format specified in the **Setup Financial Statements** option in the **Infinity POWER General Ledger** module (i.e. *normal, budget- comparison, comparative year, comparative month/year, 6 month trend, etc.*).

The Income Statement is one of the key financial reports utilized by a business. It lists your income, expenses, and net income (loss). Your business’ tax return will use a variation of the Income Statement to determine your potentially taxable income.

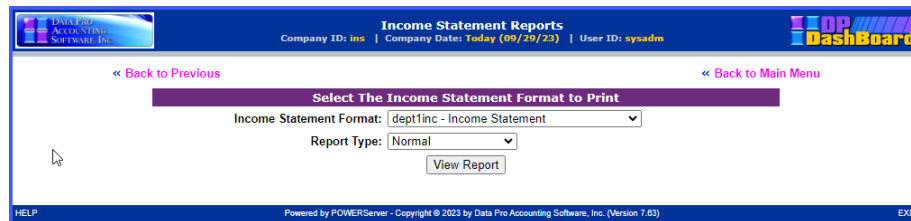
The Income Statement is typically prepared after all adjusting entries are made in the general journal, all journal entries have been posted to the general ledger, the general ledger accounts have been footed to arrive at the period end totals, and an adjusted trial balance has been prepared from the general ledger totals. Once all information is posted to the General Ledger, the data is immediately available for printing financial reports (such as the Income Statement). It may be printed on demand throughout the month to monitor a company’s sales progress.

The following screens illustrate the **Reports & Drilldowns>Income Statement** option located on the **DP/DashBoard/CRM Menu System** screen.



To Display an Income Statement:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Income Statement** option from the Reports & Drilldowns section. The Income Statement Reports screen displays.



Income Statement report formats available are:

<p>Normal</p>	<p>Prints an Income Statement in standard format (two pages). The exact way the report is presented and printed is controlled entirely by the user in setting up Financial Statement Maintenance in the Infinity POWER General Ledger module.</p>
<p>Budget Comparison</p>	<p>Prints an Income Statement that includes any budgeted numbers setup in the “SetUp Accounts” option when configuring your Chart of Accounts or the option to setup or enter change budgets, in the Infinity POWER General Ledger module. The report will compare the budgeted numbers against the actual and print any variance between the two numbers. Any over budget amounts will appear as a positive number; under-budget as negative numbers.</p>

Comparative Year	Prints an Income Statement with two printed columns of information. The first column reflects the current year's information as of the system date. This information is identical to printing the normal Balance Sheet. The second column reflects the prior year's information configured in the “ SetUp Accounts ” option in the Infinity POWER General Ledger module.
Comparative Month/Year	Prints an Income Statement that compares the current month's actual account balances with both the prior month's actual account balances and the prior year's actual account balances for the same month.
6 Month Trend	<p>Prints an Income Statement that compares the current month's actual account balances with the previous five (5) month's actual account balances, even if the previous months occurred in a prior year.</p> <p>To run this version of the report, you must have data files in the prior year, if the date range selected crosses back into a prior year. Otherwise, a warning displays warning and the report will not run. If you do not desire to create prior year's data files, simply run the report with the system date set to the sixth fiscal period of the year or higher.</p>
Quarterly Statement	Prints an Income Statement providing quarter-to-date and year-to-date figures, useful for estimating tax liability. If you are using 13 Period processing, this report will not print. The “ Year-to-Date Only ” report provides year to date only statements, beneficial for preparing the IRS statement at year-end without showing all of the last month's adjustments and depreciation entries.
Year-To-Date Only	Print an Income Report providing the year-to-date figures only. No monthly totals will appear.
Annual Budget	Prints an Income Statement providing the current period actual, the Year-to-Date actual, the annual budget, the portion of the remaining budget that is left for the year, and their respective percentages. This is an ideal report for telling management where they stand relative to the point in time within a fiscal year.

2. Select the desired Income Statement form from the **Income Statement Format** pull-down menu.
3. Select the desired report type from the **Report Type** pull-down menu. The report type options are pre-defined based on the configuration defined in the **Infinity POWER General Ledger** module.
4. <Click> the **View Report** button. The Income Statement Report screen displays the requested report information.

	Current Period		Year-to-Date	
	\$	%	\$	%
INCOME				
Revenue	\$514.57	106.35	\$7,780.93	104.29
Sales Returns and Allowances	(25.73)	5.32	(369.73)	4.96
Cash Discounts Earned	(5.00)	1.03	10.00	0.13
Freight Charged	(0.00)	0.00	40.00	0.54
TOTAL INCOME	\$483.84	100.00	\$7,461.16	100.00
COST OF GOODS SOLD				
Cost of Sales	\$10.00	2.07	\$590.44	7.91
TOTAL COST OF GOODS SOLD	\$10.00	2.07	\$590.44	7.91
GROSS PROFIT	(\$473.84)	97.93	(\$6,870.72)	92.09
OPERATING EXPENSES				
Wages and Salaries	\$0.00	0.00	\$12,638.58	169.39
Supplies - Office	0.00	0.00	250.00	3.35
Supplies - Warehouse	0.00	0.00	150.00	2.01
Tools Expense	0.00	0.00	100.00	1.34
FICA Taxes	0.00	0.00	896.24	12.01
Unemployment Taxes	0.00	0.00	449.02	6.02
TOTAL OPERATING EXPENSES	\$0.00	0.00	\$14,483.84	194.12
NET INCOME (LOSS) FROM OPERATIONS	\$473.84	97.93	(\$7,613.12)	102.04
NET INCOME AFTER TAX	\$473.84	97.93	(\$7,613.12)	102.04

NOTE

<Click> on the PDF icon in the top left of the report to display a printable PDF version of the report.

5. <Click> the <<Back to Previous option to request another report or the <<Back to Main Menu option to return to the DP/DashBoard/CRM Menu System screen.

Financial Statement Drilldown

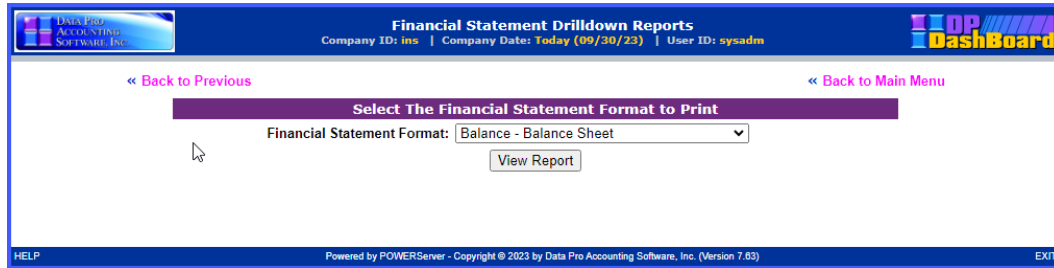
This option displays financial statements in Balance Sheet, Income Statement, and Cashflow report formats. The drilldown capability allows you to select individual components on each report to get specific financial data on those selected items (i.e. **Balance Sheet>Current Assets>Y-T-D Amount**). The Drilldown function provides the capability to tailor financial statements to display only the content you are interested in viewing.

The following screen illustrates where the **Reports & Drilldowns>Financial Statement Drilldown** option is located on the DP/DashBoard/CRM Menu System screen.



To Access the Financial Statement Drilldown Option:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System screen, select the **Financial Statement Drilldown** option from the Reports & Drilldowns section. The Financial Statements Drilldown Reports screen displays.



NOTE

Financial Statement formats available are solely based on the number of financial statements formats you have defined for each company.

Balance Sheet

This Financial Statement Drilldown option displays a financial report in Balance Sheet format, providing the month-to-date (M-T-D) and year-to-date (Y-T-D) balances for the following Balance Sheet components: Current Assets, Fixed Assets, Other Assets, Current Liabilities, Long Term Liability, Stockholder Equity, and Current Period Profit (Loss).

To Display a Balance Sheet:

1. From the Financial Statement Drilldown Reports Screen, select one of the formats defined in your system. In the INS Sample Co. this would appear as **Balance – Balance Sheet** or **Balance2 – Balance Sheet – Bank Copy**, in the Financial Statement Format pull-down menu. The appropriate Balance Sheet report displays.

Description	M-T-D Amount	Y-T-D Amount
CURRENT ASSETS	\$129,357,232.66	\$129,357,232.66
PREPAID EXPENSES	\$450.00	\$450.00
FIXED ASSETS	\$378,606.50	\$378,606.50
OTHER ASSETS	\$0.00	\$0.00
Account Range 20000 to 26999	(\$1,088,234.62)	(\$1,088,234.62)
LONG TERM LIABILITIES	(\$142,740.12)	(\$142,740.12)
STOCKHOLDER EQUITY	(\$128,505,337.62)	(\$128,505,337.62)
Current Period Profit (Loss)	\$0.00	\$23.20

To Drilldown a Balance Sheet Report:

1. <Click> a component in the **Description** column of the Balance Sheet report to drilldown and display the next report level (*i.e. Current Assets*). The Financial Statement Drilldown Report screen displays containing the M-T-D and Y-T-D balances for the selected component.

Description	M-T-D Amount	Y-T-D Amount
CURRENT ASSETS	\$129,357,232.66	\$129,357,232.66
PREPAID EXPENSES	\$450.00	\$450.00
FIXED ASSETS	\$378,606.50	\$378,606.50
OTHER ASSETS	\$0.00	\$0.00
Account Range 200000 to 269999	(\$1,088,234.62)	(\$1,088,234.62)
LONG TERM LIABILITIES	(\$142,740.12)	(\$142,740.12)
STOCKHOLDER EQUITY	(\$128,505,337.62)	(\$128,505,337.62)
Current Period Profit (Loss)	\$0.00	\$23.20

Account #	Description	M-T-D Amount	Y-T-D Amount
11100	Cash on Hand	\$14,840.31	\$14,840.31
11105	Petty Cash	\$500.00	\$500.00
11110	Cash in Bank - General	\$164,955.27	\$164,955.27
11120	Cash in Bank - Payroll	(\$17,112.59)	(\$17,112.59)
11200	Notes Receivable	\$500.00	\$500.00
11300	Accounts Receivable - Customer	\$128,514,162.95	\$128,514,162.95
11310	Accounts Receivable - Other	\$29,366.09	\$29,366.09
11320	A/R - Employee Receivables	\$0.00	\$0.00
11350	A/R - Tampa Main Office	\$500.00	\$500.00
11355	A/R - Orlando Warehouse	\$1,115.81	\$1,115.81
11360	A/R - Miami Warehouse	\$5,285.10	\$5,285.10
11400	Inventory - Tampa Main Office	\$48,549.31	\$48,549.31
11405	Inv - Orlando Warehouse	\$0.00	\$0.00
11406	Inventory - Miami Warehouse	\$0.00	\$0.00
11410	Inventory - Supplies - Tampa	\$0.00	\$0.00
11420	Inventory - Finished Products	\$212,335.00	\$212,335.00
11430	Accrued Inventory - Receipts	(\$12,893.25)	(\$12,893.25)
11440	Accrued Inventory - COS	\$2.50	\$2.50
11450	Work In Process	\$394,326.16	\$394,326.16
11600	Prepaid Insurance	\$800.00	\$800.00
Total CURRENT ASSETS:		\$129,357,232.66	\$129,357,232.66

2. <Click> a Balance in either the **M-T-D Account** or **Y-T-D Account** columns to drilldown and display the next report level containing the detailed balance information.

Financial Statement Drilldown Report
Company ID: ins | Company Date: 04/30/23* | User ID: sysadm

« Back to Previous **CURRENT ASSETS** « Back to Main Menu

Account #	Description	M-T-D Amount	Y-T-D Amount
11100	Cash on Hand	\$14,830.31	\$14,830.31
11105	Petty Cash	\$500.00	\$500.00
11110	Cash in Bank - General	\$164,955.27	\$164,955.27
11120	Cash in Bank - Payroll	(\$16,515.09)	(\$16,515.09)
11200	Notes Receivable	\$500.00	\$500.00
11300	Accounts Receivable - Customer	\$128,513,474.64	\$128,513,474.64
11310	Accounts Receivable - Other	\$29,366.09	\$29,366.09
11320	A/R - Employee Receivables	\$0.00	\$0.00
11350	A/R - Tampa Main Office	\$500.00	\$500.00
11355	A/R - Orlando Warehouse	\$1,115.81	\$1,115.81
11360	A/R - Miami Warehouse	\$5,285.10	\$5,285.10
11400	Inventory - Tampa Main Office	\$213,190.31	\$213,190.31
11405	Inv - Orlando Warehouse	\$0.00	\$0.00
11406	Inventory - Miami Warehouse	\$0.00	\$0.00
11410	Inventory - Supplies - Tampa	\$0.00	\$0.00
11420	Inventory - Finished Products	\$45,410.00	\$45,410.00
11430	Accrued Inventory - Receipts	(\$12,893.25)	(\$12,893.25)
11440	Accrued Inventory - COS	\$12.50	\$12.50
11450	Work In Process	\$394,326.16	\$394,326.16
11600	Prepaid Insurance	\$800.00	\$800.00
Total CURRENT ASSETS:		\$129,354,857.85	\$129,354,857.85

« Back to Previous **CURRENT ASSETS** « Back to Main Menu

Financial Statement Drilldown Report
Company ID: ins | Company Date: 04/30/23* | User ID: sysadm

« Back to Previous **Accounts Receivable - Customer (11300)** « Back to Main Menu

Date	Journal	Description	Check	Trans #	Amount
Beginning Balance:					\$128,512,690.26
04/06/2023	6	Allens Hardware Shops Inc.	69408	AR	\$701.10
04/25/2023	6	Allens Hardware Shops Inc.	69409	AR	\$26.20
04/25/2023	6	Allens Hardware Shops Inc.	69410	AR	\$57.08
Total Accounts Receivable - Customer (11300):					\$128,513,474.64

« Back to Previous **Accounts Receivable - Customer (11300)** « Back to Main Menu

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The following table describes the details in the lowest level drilldown report:

Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER General Ledger module. It may be up to five (5) characters (alpha/numeric).
Description	Description of transaction type of the listed components. User definable, 15-20 alpha/numeric characters.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component (either M-T-D or Y-T-D).

Cashflow

This Financial Statement Drilldown option displays a financial report in Cashflow format, providing the month-to-date (**M-T-D**) and year-to-date (**Y-T-D**) cashflow amounts for Net Income, numerous account ranges, and Cash & Cash Equivalent at Beginning of Period. Cashflow is a summary of your business' inflows and outflows over a specified period of time.

This will give you some indication of your business' ability to create the resources necessary for expansion, or ability to support the business owner, as well as recognize excessive cash flow gaps.

NOTE

When the company has a “**cash inflow**” into the business relative to a specific account or category, it will be reflected on this report as a positive number. Accounts or categories that have used cash and created a “**cash outflow**” during this period will reflect negative amounts.

To Display a Statement of Cash Flows:

1. From the Financial Statement Drilldown Reports Screen, select a **Cashflow Financial Statement** format defined in your system. In the **INS Sample Co.** this would appear as **Cashflow – Statement of Cash Flows** in the Financial Statement Format pull-down menu. The Statement of Cash Flows report displays.

Description	M-T-D Amount	Y-T-D Amount
Net Income	(\$713.57)	(\$710.57)
Account Range 12120 to 12120	(\$25,467.49)	(\$25,467.49)
Account Range 12220 to 12220	\$0.00	\$0.00
Account Range 12420 to 12420	(\$28,256.60)	(\$28,256.60)
Account Range 12620 to 12620	(\$11,981.11)	(\$11,981.11)
Account Range 12820 to 12820	(\$21,604.17)	(\$21,604.17)
Account Range 11300 to 11800	\$129,191,037.36	\$129,191,037.36
Account Range 21200 to 26999	(\$570,006.88)	(\$570,006.88)
Account Range 12000 to 12000	\$53,000.00	\$53,000.00
Account Range 12100 to 12100	\$224,813.00	\$224,813.00
Account Range 12200 to 12200	\$0.00	\$0.00
Account Range 12400 to 12400	\$127,792.10	\$127,792.10
Account Range 12600 to 12600	\$27,635.35	\$27,635.35
Account Range 12800 to 12800	\$32,675.42	\$32,675.42
Account Range 11200 to 11200	\$500.00	\$500.00
Account Range 21100 to 21100	(\$515,119.16)	(\$515,119.16)
Account Range 27100 to 27200	(\$142,740.12)	(\$142,740.12)
Account Range 30000 to 31000	(\$50,000.00)	(\$50,000.00)
Account Range 35000 to 35000	(\$128,455,337.62)	(\$128,455,337.62)
Cash & Cash Equiv. At Beg Of Period [P]	\$163,770.49	\$163,770.49

To Drilldown a Statement of Cash Flows:

1. <Click> a component in the **Description** column of the cashflow report to drilldown and display the next report level (e.g. Net Income). The Statement of Cash Flows report screen displays containing the **M-T-D** and **Y-T-D** balances for the selected component.

Financial Statement Drilldown Report
Company ID: ins | Company Date: 04/30/23* | User ID: sysadm

Statement of Cash Flows

Description	M-T-D Amount	Y-T-D Amount
Net Income	(\$713.57)	(\$710.57)
Account View Statement: 12120	(\$25,467.49)	(\$25,467.49)
Account Income by Month: 12220	\$0.00	\$0.00
Account Year-to-Date & to-Date Date: 12420	(\$28,256.60)	(\$28,256.60)
Account Range 12620 to 12620	(\$11,981.11)	(\$11,981.11)
Account Range 12820 to 12820	(\$21,604.17)	(\$21,604.17)
Account Range 11300 to 11800	\$129,191,037.36	\$129,191,037.36
Account Range 21200 to 26999	(\$570,006.88)	(\$570,006.88)
Account Range 12000 to 12000	\$53,000.00	\$53,000.00
Account Range 12100 to 12100	\$224,813.00	\$224,813.00
Account Range 12200 to 12200	\$0.00	\$0.00
Account Range 12400 to 12400	\$127,792.10	\$127,792.10
Account Range 12600 to 12600	\$27,635.35	\$27,635.35
Account Range 12800 to 12800	\$32,675.42	\$32,675.42
Account Range 11200 to 11200	\$500.00	\$500.00
Account Range 21100 to 21100	(\$515,119.16)	(\$515,119.16)
Account Range 27100 to 27200	(\$142,740.12)	(\$142,740.12)
Account Range 30000 to 31000	(\$50,000.00)	(\$50,000.00)
Account Range 35000 to 35000	(\$128,455,337.62)	(\$128,455,337.62)
Cash & Cash Equiv. At Beg Of Period [P]	\$163,770.49	\$163,770.49

dev.dpro.com/d-dash/dash80/reports/drilldown2.asp?BegAcc=40000&EndAcc=99999&AccountMask=&LineDesc=Net Income&Message=Net Income

Financial Statement Drilldown Report
Company ID: ins | Company Date: 04/30/23* | User ID: sysadm

Net Income

Account #	Description	M-T-D Amount	Y-T-D Amount
40000	Revenue	(\$819.54)	(\$819.54)
40000-1	Revenue - Commercial	\$0.00	\$0.00
40000-2	Revenue - Residential	\$0.00	\$0.00
41100-1	Revenue Concrete - Commercial	\$0.00	\$0.00
41100-2	Revenue Concrete - Residential	\$0.00	\$0.00
41200-1	Revenue Electrical- Commercial	\$0.00	\$0.00
41200-2	Revenue Electrical-Residential	\$0.00	\$0.00

2. <Click> a component in either the **M-T-D Account** or **Y-T-D Account** columns to drilldown and display the next report level containing the detailed cashflow information.

Financial Statement Drilldown Report
Company ID: ins | Company Date: 04/30/23* | User ID: sysadm

Revenue (40000)

Date	Journal	Description	Check	Trans #	Amount
04/06/2023	6	Allens Hardware Shops Inc.	69408	AR	(\$738.00)
04/25/2023	6	Allens Hardware Shops Inc.	69409	AR	(\$25.65)
04/25/2023	6	Allens Hardware Shops Inc.	69410	AR	(\$55.89)
Total Revenue (40000):					(\$819.54)

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The following table describes the **Revenue** report details:

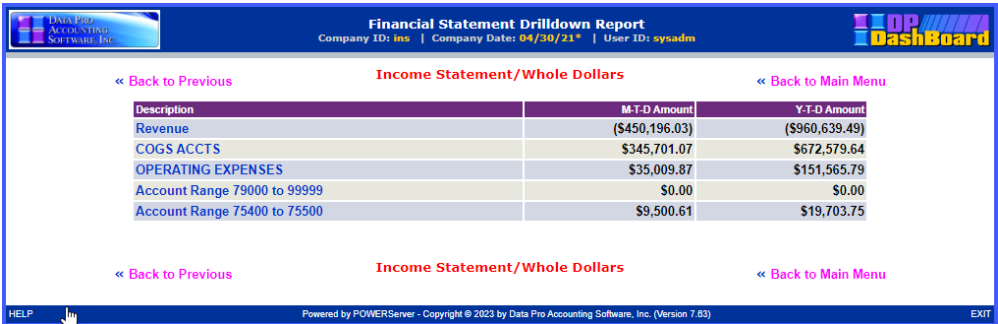
Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER General Ledger module. It may be up to five (5) characters (alpha/numeric).
Description	Description of transaction type of the listed components.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component (either M-T-D or Y-T-D).

Income Statement

This Financial Statement Drilldown option displays a financial report in Income Statement format, providing the month-to-date (M-T-D) and year-to-date (Y-T-D) income for the following components: Revenue, COGS ACCTS, OPERATING EXPENSES, and specified account ranges.

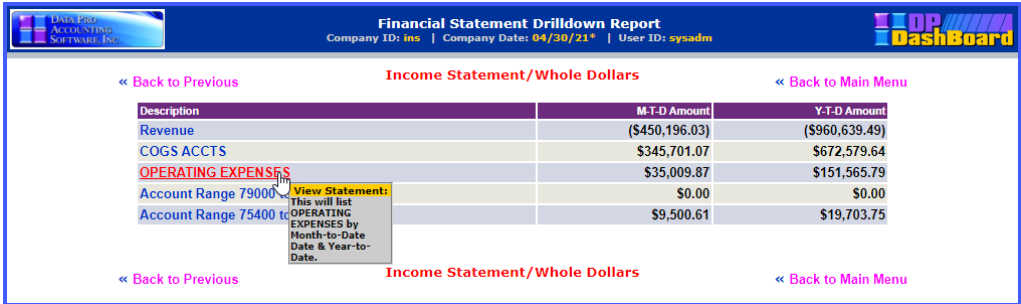
To Display an Income Statement:

- From the Financial Statement Drilldown Reports Screen, select a Financial Statement format defined in your system. In the INS Sample Co. this would appear as **Income–Income Statement or Income2 – Income Statement/Whole Dollars** in the Financial Statement Format pull-down menu. The appropriate Income Statement report displays.



To Drilldown an Income Statement:

- <Click> a component in the **Description** column of the Income Statement report to drilldown and display the next report level (e.g. Operating Expenses). The Financial Statement Drilldown Report screen displays containing the **M-T-D** and **Y-T-D** balances for the selected component.



Account #	Description	M-T-D Amount	Y-T-D Amount
60000	Inter-Dept. Payroll Transfers	\$0.00	\$0.00
60100	Wages and Salaries	\$18,553.32	\$75,876.15
60100-1	Salaries - Commercial	\$11,018.76	\$25,753.76
60100-2	Salaries - Residential	\$0.00	\$16,226.25
60500	OH Expense Allocation	(\$2,203.76)	(\$8,862.83)
61000	Advertising Expense	\$0.00	\$0.00
61500	Automobile Expense	\$0.00	\$780.93
62000	Bad Debt Expenses	\$0.00	\$0.00
63000	Insurance	\$945.79	\$2,877.80
63500	Insurance - Worker's Comp.	\$1,305.48	\$3,816.25

2. <Click> a component in either the **M-T-D Account** or **Y-T-D Account** columns to drilldown and display the next report level containing the detailed income information.

Account #	Description	M-T-D Amount	Y-T-D Amount
60000	Inter-Dept. Payroll Transfers	\$0.00	\$0.00
60100	Wages and Salaries	\$18,553.32	\$75,876.15
60100-1	Salaries - Commercial	\$11,018.76	\$25,753.76
60100-2	Salaries - Residential	\$0.00	\$16,226.25
60500	OH Expense Allocation	(\$2,203.76)	(\$8,862.83)
61000	Advertising Expense	\$0.00	\$0.00
61500	Automobile Expense	\$0.00	\$780.93
62000	Bad Debt Expenses	\$0.00	\$0.00
63000	Insurance	\$945.79	\$2,877.80
63500	Insurance - Worker's Comp.	\$1,305.48	\$3,816.25
64000	Office Cleaning Expense	\$0.00	\$0.00
64500	Postage Expense	\$0.00	\$0.00

View Transactions:
This will list the Year-to-Date transaction detail for account 60100.

Date	Journal	Description	Check	Trans #	Amount
01/01/2021	4	Conners, Charles S.	110	PR	\$8,086.96
01/01/2021	4	Conners, Charles S.	119	PR	\$760.00
01/01/2021	4	Elliot, Frank	120	PR	\$1,080.00
01/01/2021	4	Franklin, Albert T.	121	PR	\$780.00
01/01/2021	4	Jack Friedman	122	PR	\$1,000.00
01/01/2021	4	Gordon, Jim	123	PR	\$760.00
01/01/2021	4	Harris, Susan	124	PR	\$2,083.33
01/01/2021	4	Bill Maquire	125	PR	\$1,000.00
01/01/2021	4	Rouse, Stan	126	PR	\$4,489.25
01/01/2021	4	Wright, Ron	127	PR	\$840.00
01/31/2021	1	Net Effect J/E for January	960131	01316	\$10,851.58
02/28/2021	1	Net Effect J/E for February			\$10,866.08
03/31/2021	1	Net Effect J/E for March			\$14,725.63
04/13/2021	4	Bi-Weekly		PR	\$1,180.00
04/30/2021	4	Monthly		PR	\$17,373.32

The following table describes the **Wages and Salaries** report details:

Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER General Ledger module. It may be up to five (5) alpha/numeric characters.
Description	Description of transaction type of the listed components.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component. (Either M-T-D or Y-T-D).

Bank Account Balances

This option displays the true balance for associated General Ledger Cash Accounts. The cash balance in your books never agrees with the balance shown on the bank statement due to the delay of unrecorded transactions, checks, deposits, and errors. The Bank Account Balance function performs a bank reconciliation on the specified account. Such information includes both the account balance (balance without consideration for deposits/debits to the account) and the book balance (balance after consideration for cleared and outstanding checks, cleared and outstanding deposits, etc.).

Once all information is posted to the General Ledger, the data is immediately available for printing financial reports such as the Bank Account Balances.

The following screen illustrates where the **Reports & Drilldowns>Bank Account Balances** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display a Bank Account Balances Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System Window, select the **Bank Account Balances** option from the **DP/DashBoard/CRM Reports & Drilldowns** section. The Bank Account Balances screen displays.

The screenshot shows the 'Bank Account Balances' screen with a table of accounts. The table has columns for Acct #, Description, Bank Account #, GL Cash Account, and Date Reconciled. There are navigation buttons for 'Back to Previous' and 'Back to Main Menu'.

Acct #	Description	Bank Account #	GL Cash Account	Date Reconciled
1	Bank of America Checking	1444445555	11110	03/31/19
2	Bank of America Savings	516551557	11110	03/28/19
3	Wachovia Payroll Account	815234981	11110	04/15/19
4	Money Market Account	46777158	11110	03/31/19
5	CD Deposits	84678111	11110	03/31/19

The following table describes the **Bank Account Balances** screen details:

Acct #	Incrementally numbers accounts as they are added. Newer accounts display at the bottom of the list.
Description	Selecting a component in this column allows you to view the reconciliation on that account.
Bank Account #	Actual account number assigned by the bank.
GL Cash Account	General Ledger Cash Account number.
Date Reconciled	Date in which the specified account is balanced.

To Drilldown a Bank Account Balances Report:

1. <Click> a component in the **Description** column of the Bank Account Balances report to drilldown and display the next report level (e.g. Default Bank Account). The Bank Account Balances screen displays containing the detailed account information for the selected component.

The screenshot shows the 'Bank Account Balances' screen with a drilldown menu open over the 'Bank of America Savings' account. The menu options are: View Account, View Balance, Cash Account, Cleared Checks & Deposits, Outstanding Checks.

Acct #	Description	Bank Account #	GL Cash Account	Date Reconciled
1	Bank of America Checking	1444445555	11110	03/31/19
2	Bank of America Savings	516551557	11110	03/28/19
3	Wachovia Payroll Account	815234981	11110	04/15/19
4	Money Market Account	46777158	11110	03/31/19
5	CD Deposits	84678111	11110	03/31/19

2. <Click> the desired component (**GL Cash Account, Cleared Checks, Cleared Deposits, Outstanding Checks, or Outstanding Deposits**) to drilldown and display the next report level containing the specified detailed information. The appropriate report displays.

The screenshot shows the detailed account information for 'Bank of America Checking' (Acct #: 1). The information is displayed in two columns.

Acct #: 1	Last Statement Date: 03/31/19
Description: Bank of America Checking	Statement Balance: \$62,074.69
Bank Routing: 100000007	Cleared Checks: \$0.00
Bank Account: 1444445555	Cleared Deposits: \$0.00
GL Cash Account: 11110	Bank Balance: \$62,074.69
GL Account Balance: \$153,692.72	Outstanding Checks: \$47,272.27
	Outstanding Deposits: \$600.00
	Book Balance: \$297,068.03

Date	Journal	Description	Check	Trans #	Amount
Beginning Balance:					\$255,125.19
04/02/2021	2	Fla. Nat'l Bk - Fed Depository	10186	AP	(\$6,883.99)
04/02/2021	2	Clark Financial Services, LLC	10187	AP	(\$4,905.23)
04/02/2021	2	Federal Unemployment Office	10188	AP	(\$412.54)
04/02/2021	2	State Unemployment Office	10189	AP	(\$1,392.29)
04/02/2021	2	State of Florida Tax Dept.	10190	AP	(\$2,805.96)
04/02/2021	2	Fla. Nat'l Bk - Fed Depository	10191	AP	(\$10,203.14)
04/13/2021	2	Bower's Roofing Supplies	10192	AP	(\$1,506.30)
04/13/2021	2	Florida Lumber, Inc.	10193	AP	(\$18,720.45)
04/13/2021	2	General Telephone Company	10194	AP	(\$289.48)
04/13/2021	2	NCNB National Bank	10195	AP	(\$2,030.39)
04/13/2021	2	S & S Sub Contractors	10196	AP	(\$11,070.00)
04/13/2021	2	Suncoast Concrete Supplies	10197	AP	(\$1,479.80)
04/13/2021	2	Tampa Electric Co.	10198	AP	(\$357.19)
04/13/2021	2	Tampa Water & Sewage Co.	10199	AP	(\$122.97)

Accounts Payable Aging & Drilldown

This option lists the balances due to your suppliers and other creditors. The Accounts Payable Aging report provides a breakdown by supplier of the total amount of your accounts payable balance (past or future). Using this report can inform you of any discrepancies in satisfying your accounts payable. If the report indicates you have several bills past due, you may need to reevaluate how your cash flow is being managed. It is common to run an Accounts Payable Aging Report at the end of each month.

NOTE

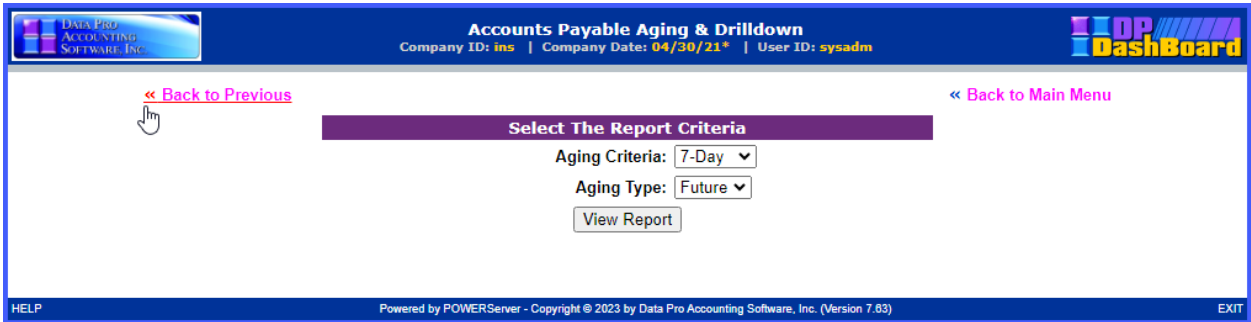
The sum of the amounts you owe to your suppliers is listed as a current liability on your balance sheet.

The following screen illustrates where the **Reports & Drilldowns>Accounts Payable Aging and Drilldown** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display an Accounts Payable Aging & Drilldown Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Accounts Payable Aging & Drilldown** option from the Reports & Drilldowns section. The Accounts Payable Aging & Drilldown screen displays.



2. Select the desired report age (7-day or 30-day) to be run from the **Aging Criteria** pull-down menu.
3. Select the desired aging type (Future or Past) from the **Aging Type** pull-down menu.
4. <Click> the **View Report** button. The appropriate Aging & Drilldown report displays in the format specified.

Vendor #	Name	Current Due	1 - 7 Days	8 - 14 Days	Over 14 Days	Other	Total
BOW1	Bower's Roofing Supplies	\$0.00	\$0.00	\$0.00	\$9,475.00	\$3,500.00	\$12,975.00
FLO1	Florida Lumber, Inc.	\$2,000.00	\$0.00	\$0.00	\$0.00	\$1,500.00	\$3,500.00
GEN1	General Telephone Company	\$600.00	\$0.00	\$0.00	\$0.00	\$333.85	\$933.85
NCNB	NCNB National Bank	\$37,729.87	\$0.00	\$0.00	\$0.00	\$1,575.00	\$39,304.87
PITSAC	Pitts A/C Repair	\$0.00	\$0.00	\$0.00	\$0.00	\$2,155.96	\$2,155.96
S&S	S & S Sub Contractors	\$33,772.00	\$0.00	\$0.00	\$0.00	\$1,316.00	\$35,088.00
SCO1	Scotty's Building Supplies	\$35,193.75	\$0.00	\$0.00	\$0.00	\$1,725.99	\$36,919.74
SHEL	Shell Service Station	\$2,545.55	\$0.00	\$0.00	\$0.00	\$1,019.82	\$3,565.37
SUN1	Suncoast Concrete Supplies	\$28,000.00	\$0.00	\$0.00	\$0.00	\$1,041.08	\$29,041.08
TAM1	Tampa Electrical Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$284.06	\$284.06
TECO	Tampa Electric Co.	\$21,204.23	\$0.00	\$0.00	\$0.00	\$308.00	\$21,512.23
UNI1	Unified Supply Company	\$5,169.96	\$0.00	\$0.00	\$0.00	\$0.00	\$5,169.96
WATER	Tampa Water & Sewage Co.	\$1,200.00	\$0.00	\$0.00	\$0.00	\$621.96	\$1,821.96
WORK	Work Place	\$23,735.40	\$0.00	\$0.00	\$107.00	\$1,783.00	\$25,625.40
Totals:		\$191,150.76	\$0.00	\$0.00	\$9,582.00	\$17,164.72	\$217,897.48

The following table describes the **Accounts Payable Past/Future Due Aging** report details:

Vendor #	Number associated with the Vendor Name as defined in the Infinity POWER Accounts Payable module.
Name	Name of the supplier/creditor owed payment.
Current Due	Current balance owed to the specified vendor.
1-7 Days	For Past Aging: Lists the amount owed to specified vendor in the previous week. For Future Aging: Lists amount owed to specified vendor in the following week.
8-14 Days	For Past Aging: List the amount owed to specified vendor in the previous two weeks. For Future Aging: Lists the amount owed to specified vendor in the following two weeks.
Over 14	For Past Aging: Lists the amount owed to specified vendor over two weeks prior. For Future Aging: Lists the amount owed to specified vendor beyond the following two weeks.

Other	Summary column for all other open items that are outside the range of the Define Aging categories.
Total	Displays the total amount owed to the specified vendor.

To Drilldown an Accounts Payable Aging & Drilldown Report:

1. <Click> a component in the **Name** column of the Past/Future Due Aging report to drilldown by customer and display the next report level (e.g. Bower’s Roofing Supplies). The Past/Future Due Aging screen displays depending on the criteria selected.

Accounts Payable Aging & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Future Due Aging

Vendor #	Name	Current Due	1 - 7 Days	8 - 14 Days	Over 14 Days	Other	Total
BOW1	Bower's Roofing Supplies	\$0.00	\$0.00	\$0.00	\$9,475.00	\$3,500.00	\$12,975.00
FLO1	Florida Lumber, Inc.	\$2,000.00	\$0.00	\$0.00	\$0.00	\$1,500.00	\$3,500.00
GEN1	General Telephone Compa	\$600.00	\$0.00	\$0.00	\$0.00	\$333.85	\$933.85
NCNB	NCNB National Bank	\$37,729.87	\$0.00	\$0.00	\$0.00	\$1,575.00	\$39,304.87
PITSAC	Pitts A/C Repair	\$0.00	\$0.00	\$0.00	\$0.00	\$2,155.96	\$2,155.96
S&S	S & S Sub Contractors	\$33,772.00	\$0.00	\$0.00	\$0.00	\$1,316.00	\$35,088.00
SCO1	Scotty's Building Supplies	\$35,193.75	\$0.00	\$0.00	\$0.00	\$1,725.99	\$36,919.74
SHEL	Shell Service Station	\$2,545.55	\$0.00	\$0.00	\$0.00	\$1,019.82	\$3,565.37
SUN1	Suncoast Concrete Supplies	\$28,000.00	\$0.00	\$0.00	\$0.00	\$1,041.08	\$29,041.08
TAM1	Tampa Electrical Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$284.06	\$284.06
TECO	Tampa Electric Co.	\$21,204.23	\$0.00	\$0.00	\$0.00	\$308.00	\$21,512.23
UNI1	Unified Supply Company	\$5,169.96	\$0.00	\$0.00	\$0.00	\$0.00	\$5,169.96
WATER	Tampa Water & Sewage Co.	\$1,200.00	\$0.00	\$0.00	\$0.00	\$621.96	\$1,821.96
WORK	Work Place	\$23,735.40	\$0.00	\$0.00	\$107.00	\$1,783.00	\$25,625.40
Totals:		\$191,150.76	\$0.00	\$0.00	\$9,582.00	\$17,164.72	\$217,897.48

Accounts Payable Aging & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Future Due Aging

Vendor Name: **Bower's Roofing Supplies** Vendor Contact: **Tom Hill**
Vendor Phone: **813-247-8841** Vendor E-mail:

Date	Invoice #	Type	Description	Due Date	Amount
06/12/20	43321	Inv	Supplier:BOW1	Suspense	\$3,500.00
07/02/21	2222	Inv	PO #: 100153	08/01/21	\$0.00
07/14/22	5555	Inv	PO #: 100154	08/13/22	\$8,025.00
05/30/23	5555	Inv	PO #: 100157	06/29/23	\$1,300.00
08/09/23	123456	Inv	Misc Supplies	09/08/23	\$150.00
Total:					\$12,975.00

The following table describes the **Accounts Payable Customer** drilldown report details:

Vendor Name	Name of the supplier/creditor.
Vendor Phone	Phone number of the vendor contact.
Vendor Contact	Name of contact for the supplier/creditor.
Vendor E-mail	E-mail address of the vendor contact.
Date	Date of the transaction.
Invoice #	Invoice number associated with the associated vendor name. You can drilldown to view detailed transaction data in the format specified for Aging Criteria (7-day, 30-day) and Aging Type (Past or Future).
Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Description	Describes the purchase order number (PO #) associated with the transaction.
Due Date	Date the amount is owed to the specified vendor.
Amount	Total amount due to the specified vendor.

2. <Click> a component in the **Invoice #** column to drilldown by invoice and display the next report level containing the specified detailed information. The Past/Future Due Aging report displays.

NOTE

By clicking on the detail headers, items listed can toggle between ascending and descending order

Accounts Payable Aging & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Vendor Name: **Bower's Roofing Supplies** | Vendor Contact: **Tom Hill**
Vendor Phone: **813-247-8841** | Vendor E-mail:

Date	Invoice #	Type	Description	Due Date	Amount
06/12/20	43321	Inv	Supplier:BOW1	Suspense	\$3,500.00
07/02/21	2222	Inv	PO #: 100153	08/01/21	\$0.00
07/14/22	5555	Inv	PO #: 100154	08/13/22	\$8,025.00
05/30/23	5555	Inv	PO #: 100157	06/29/23	\$1,300.00
08/09/23	123456	Inv	Misc Supplies	09/08/23	\$150.00
Total:					\$12,975.00

Accounts Payable Transactions & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Trans Date: **07/20/20** | Vendor: **BOW1 - Bower's Roofing Supplies**
Trans Num: **43321** | Vendor Contact: **Tom Hill**
Trans Type: **Inv** | Phone: **813-247-8841**
Trans Desc: **Supplier:BOW1** | E-mail: **thill@bowerroofing.com**

GL Account	GL Description	Description	Amount
11450	Work In Process	Supplier:BOW1	3,500.00
Totals:			3,500.00

The following table describes the **Accounts Payable invoice** drilldown report details:

Trans Date	Date of transaction of the listed components.
Transaction Num	Transaction number associated with listed components.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the purchase order number (PO #) associated with the transaction.
Vendor	Name of the supplier/creditor.
Vendor Contact	Name of contact for the supplier/creditor.
Phone	Phone number of the vendor contact.
E-mail	E-mail address of the vendor contact.
GL Account	Account number of the associated General Ledger cash account.
GL Description	Status of the associated General Ledger cash account.
Description	Describes the purchase order number (PO #) associated with the transaction.
Amount	Total balance owed to specified vendor.

Accounts Payable Transactions & Drilldown

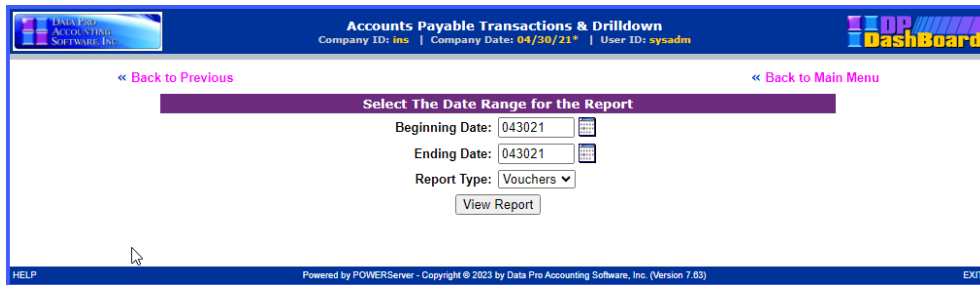
This option lists the payable transaction history for the active company selected. The Accounts Payable Transaction report provides a breakdown by supplier of all payable items for a specified period of time.


The following screen illustrates where the **Reports & Drilldowns>Accounts Payable Transactions & Drilldown** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display an Accounts Payable Transactions & Drilldown Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Accounts Payable Transactions & Drilldown** option from the Reports & Drilldowns section. The Accounts Payable Transactions & Drilldown screen displays.



2. <Click> the calendar icon  next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on << to change the month prior to the current date, or <click> >> to change the month after the current date. The calendar closes and the selected beginning date displays.
3. Select the desired report type (vouchers or checks) from the **Report Type** pull-down menu.
4. <Click the **View Report** button. The appropriate register report displays listing all payable items for the specified date range.

Date	Trans #	Type	Vendor	Description	Amount
01/03/21	010396	Inv	NCNB National Bank	Accrued Int on Note	\$14,666.64
01/03/21	010396	Inv	Fla. Nat'l Bk - Fed Depository	95 Est Fed Inc Tax	\$1,917.18
01/03/21	010496	Inv	Shell Service Station	Auto Repairs	\$780.93
01/03/21	010996	Inv	Suncoast Concrete Supplies	Invoice	\$494.00
01/03/21	1664489	Inv	General Telephone Company	Dec Telephone Bill	\$478.46
01/03/21	51766-3	Inv	State of Florida Tax Dept.	Dec Sales Tax	\$205.94
01/03/21	860456	Inv	Tampa Water & Sewage Co.	Dec W & S	\$156.37
01/03/21	96-0013	Inv	Suncoast Concrete Supplies	PO #: 100097	\$16,765.11
01/03/21	96-0013a	Inv	S & S Sub Contractors	PO #: 100100	\$8,370.00
01/03/21	997116-63	Inv	Tampa Electric Co.	Dec Elec	\$593.24

The following table describes the **Accounts Payable Transactions General Ledger Accounts Summary** report details:

Date	Date of each transaction listed for the specified date range.
Trans #	Number associated with transactions listed for the specified date range.
Type	Describes the type of transaction for each one listed. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Vendor	Name of the supplier/creditor associated with each transaction listed.
Description	Describes the purpose of the transaction.
Amount	Amount due for each supplier/creditor associated with each transaction listed.

To Drilldown an Accounts Payable Transactions & Drilldown Report:

1. <Click> a component in the **Trans #** column of the General Ledger Accounts Summary report to drilldown by transaction number and display the next report level (e.g. Tampa Electric Co.). The Accounts Payable Transactions & Drilldown screen displays with details on the selected transaction.

Accounts Payable Transactions & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Voucher Register from 01/01/21 to 04/30/21

Date	Trans #	Type	Vendor	Description	Amount
01/03/21	010396	Inv	NCNB National Bank	Accrued Int on Note	\$14,666.64
01/03/21	010396	Inv	Fla. Nat'l Bk - Fed Depository	95 Est Fed Inc Tax	\$1,917.18
01/03/21	010496	Inv	Shell Service Station	Auto Repairs	\$780.93
01/03/21	010996	Inv	Suncoast Concrete Supplies	Invoice	\$494.00
01/03/21	1664489	Inv	General Telephone Company	Dec Telephone Bill	\$478.46
01/03/21	51766.3	Inv	State of Florida Tax Dept.	Dec. Sales Tax	\$205.94
01/03/21	860456	Inv	Tampa Water & Sewage Co.	Dec W & S	\$156.37
01/03/21	96-0013	Inv	Suncoast Concrete Supplies	PO #: 100097	\$16,765.11
01/03/21	96-0013a	Inv	S & S Sub Contractors	PO #: 100100	\$8,370.00
01/03/21	997116	Inv	Tampa Electric Co.	Dec Elec	\$593.24
01/03/21	Accrual	Inv	Suncoast Concrete Supplies	PO #: 100097	\$0.00
01/03/21	Accrual	Inv	S & S Sub Contractors	PO #: 100100	\$0.00
01/12/21	011296	Inv	Florida Lumber, Inc.	Invoice	\$7,075.36

Accounts Payable Transactions & Drilldown
Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Trans Date: 01/03/21 Vendor: S&S - S & S Sub Contractors
 Trans Num: 96-0013a Vendor Contact: Tom Hanks
 Trans Type: Inv Phone: 813-447-1232
 Trans Desc: PO #: 100100 E-mail:

GL Account	GL Description	Description	Amount
11430	Accrued Inventory - Receipts	PO #: 100100	9,300.00
21210	Retainage Payable	PO #: 100100	-930.00
Totals:			8,370.00

The following table describes the Accounts Payable Transactions General Ledger Accounts Summary transaction number drilldown report details:

Trans Date	Date of the actual selected transaction.
Trans Num	Number associated with selected transaction.
Trans Type	Describes the type of transaction for the transaction selected. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Description	Describes the purpose of the transaction selected.
Vendor	Name of the supplier/creditor.
Vendor Contact	Name of contact for the supplier/creditor.
Phone	Phone number of the vendor contact.
Email	Email address of the vendor contact.
GL Account	Account number of the associated General Ledger cash account.
GL Description	General description of the transaction selected.
Description	Specific description of the transaction selected.
Amount	Total amount owed to the supplier/vendor for the selected transaction.

Accounts Receivable Aging & Drilldown

This option lists the balances from unpaid invoices or any other money owed to you by your customers. The Accounts Receivable Aging Report is a listing of the customers making up your total accounts receivable balance. Using this report can inform you of any discrepancies in receiving the monies due your firm. It is common to run an accounts receivable aging report at the end of each month.

NOTE

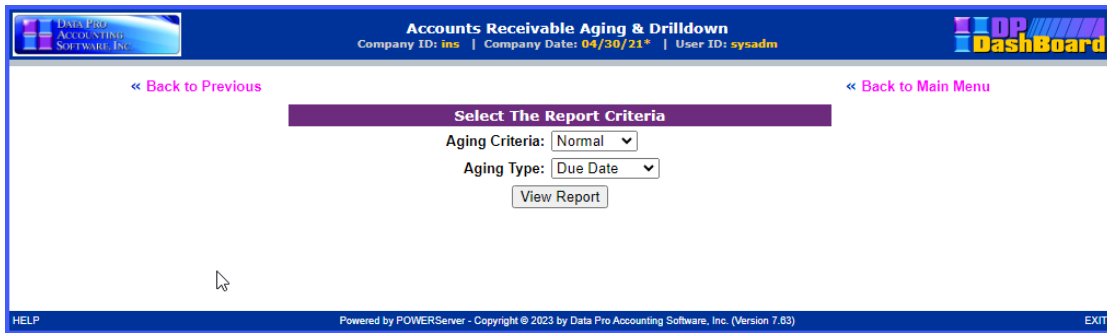
The sum of all your customer accounts receivable is listed as a current asset on your balance sheet.

The following screen illustrates where the **Reports & Drilldowns>Accounts Receivable Aging and Drilldown** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display an Accounts Receivable Aging & Drilldown Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System screen, select the **Accounts Receivable Aging & Drilldown** option from the Reports & Drilldowns section. The Accounts Receivable Aging & Drilldown screen displays.



2. Select the desired report age (Normal or Past Due) to be run from the **Aging Criteria:** pull-down menu.
3. Select the desired aging type (Due Date or Invoice Date) from the **Aging Type** pull-down menu.
4. <Click> the **View Report** button. The appropriate Aging & Drilldown report displays in the format specified.

Customer #	Name	Current	1 - 30 Days	31 - 60 Days	Over 60 Days	Other	Total
ALLE1	Allens Hardware Shops Inc.	\$127,962,649.76	\$181.91	\$161.12	\$89,081.94	\$0.00	\$128,052,074.73
HARC1	Fred Hart	\$43.60	\$370.00	\$199.33	\$7,643.95	\$0.00	\$8,256.88
HOME1	Home Depot Inc.	-\$3,161.44	\$0.00	\$0.00	\$6,467.89	\$0.00	\$3,306.45
JONJ1	Sonia Jones Interior Design	\$37,231.30	\$0.00	\$0.00	\$0.00	\$3,042.27	\$40,273.57
NAT11	National Auto Parts	\$142,746.99	\$0.00	\$12,696.27	\$1,047,522.41	\$21,330.77	\$1,224,296.44
SWIS1	Tony Swiss Construction	\$0.00	\$0.00	\$0.00	\$176,919.21	\$16,350.00	\$193,269.21
TEDS1	Ted's Sheds Inc.	\$632.34	\$0.00	\$6,102.18	\$419.33	\$0.00	\$7,153.85
UNIV1	University of Tampa	\$222,514.44	\$0.00	\$96.80	\$61,203.30	\$23,159.87	\$306,974.41
Z-CASH	Cash Sale, Thank You!	-\$120,450.00	\$0.00	\$0.00	\$17,904.80	\$1,000.00	-\$101,545.20
Totals:		\$128,242,206.99	\$551.91	\$19,255.70	\$1,407,162.83	\$64,882.91	\$129,734,060.34

The following table describes the **Accounts Receivable Aging** report details:

Customer #	Number associated with the Customer Name as defined in the Infinity POWER Accounts Receivable module.
Name	Name of each customer with an accounts receivable balance.
Current Due	Amounts due from customers for sales made during the current month.
1-30 Days	Lists the unpaid amount due from customers for sales made in the previous month. These are the customers with accounts 1 to 30 days past due
31-60 Days	Lists the amounts due from customers for sales made two months prior. These are customers with accounts 31 to 60 days past due.
Over 60	Lists the amount due from customers with accounts over 60 days past due.
Other	Summary column for all other open items that are outside the range of the Define Aging categories.
Total	Displays the total amount owed by the customer.

To Drilldown an Accounts Receivable Aging & Drilldown Report:

1. <Click> a component in the **Name** column of the Normal/Past Due Aging report to drilldown by customer and display the next report level (e.g. National Auto Parts). The appropriate Accounts Receivable Aging screen displays depending on the criteria selected.

Accounts Receivable Aging & Drilldown
 Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Normal Aging based on Due Date

Customer #	Name	Current	1 - 30 Days	31 - 60 Days	Over 60 Days	Other	Total
ALLE1	Allens Hardware Shops Inc.	\$127,962,649.76	\$181.91	\$161.12	\$89,081.94	\$0.00	\$128,052,074.73
HARC1	Fred Hart	\$43.60	\$370.00	\$199.33	\$7,643.95	\$0.00	\$8,256.88
HOME1	Home Depot Inc.	-\$3,161.44	\$0.00	\$0.00	\$6,467.89	\$0.00	\$3,306.45
JONJ1	Sonia Jones Interior Design	\$37,231.30	\$0.00	\$0.00	\$0.00	\$3,042.27	\$40,273.57
NAT11	National Auto Parts	\$142,746.99	\$0.00	\$12,696.27	\$1,047,522.41	\$21,330.77	\$1,224,296.44
SWIS1	Tony Swiss Const	\$0.00	\$0.00	\$0.00	\$176,919.21	\$16,350.00	\$193,269.21
TEDS1	Ted's Sheds Inc.	\$632.34	\$0.00	\$6,102.18	\$419.33	\$0.00	\$7,153.85
UNIV1	University of Tampa	\$222,514.44	\$0.00	\$96.80	\$61,203.30	\$23,159.87	\$306,974.41
Z-CASH	Cash Sale, Thank You!	-\$120,450.00	\$0.00	\$0.00	\$17,904.80	\$1,000.00	-\$101,545.20
Totals:		\$128,242,206.99	\$551.91	\$19,255.70	\$1,407,162.83	\$64,882.91	\$129,734,060.34

Accounts Receivable Aging & Drilldown
 Company ID: ins | Company Date: 04/30/21* | User ID: sysadm

Normal Aging based on Due Date

Customer Name: **National Auto Parts** Customer Contact: **Jeff Williams**
 Customer Phone: **813-224-5697** Customer E-mail: **jeffw@nap.com**

Date	Invoice #	Type	Description	Due Date	Amount
01/01/19	69216	Inv	Invoice	01/31/19	\$19,530.00
01/01/19	69216	Ret	Retainage	01/31/19	\$2,170.00
01/31/19	69207	Inv	Invoice	03/02/19	\$7,941.55
01/31/19	69208	Inv	Invoice	03/02/19	\$22,740.41
01/31/19	69209	Inv	Invoice	03/02/19	\$19,889.78
01/31/19	69211	Inv	Invoice	03/02/19	\$7,941.55
01/31/19	69212	Inv	Invoice	03/02/19	\$22,740.41
01/31/19	69213	Inv	Invoice	03/02/19	\$19,889.78
02/28/19	69203	Inv	Invoice	03/30/19	\$10,224.32
02/28/19	69204	Inv	Invoice	03/30/19	\$21,407.03

The following table describes the **Accounts Receivable** customer drilldown report details:

Customer Name	Name of the customer.
Customer Phone	Phone number of the customer.
Customer Contact	Name of contact for the customer.
Customer E-mail	E-mail address of the customer contact.
Date	Date of the transaction.
Invoice #	Invoice number associated with the associated customer name. You can drilldown to view detailed transaction data in the format specified for Aging Criteria (Normal or Past Due) and Aging Type (Due Date or Invoice Date).
Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Description	Describes the purchase order number (PO #) associated with the transaction.
Due Date	Date the amount is owed to the specified customer.
Amount	Total amount due to the specified customer.

- 2. <Click> a component in the **Invoice #** column to drilldown by invoice and display the next report level containing the specified detailed information. The appropriate Accounts Receivable Aging report displays.

NOTE

By clicking on the detail headers, items listed can toggle between ascending and descending order.

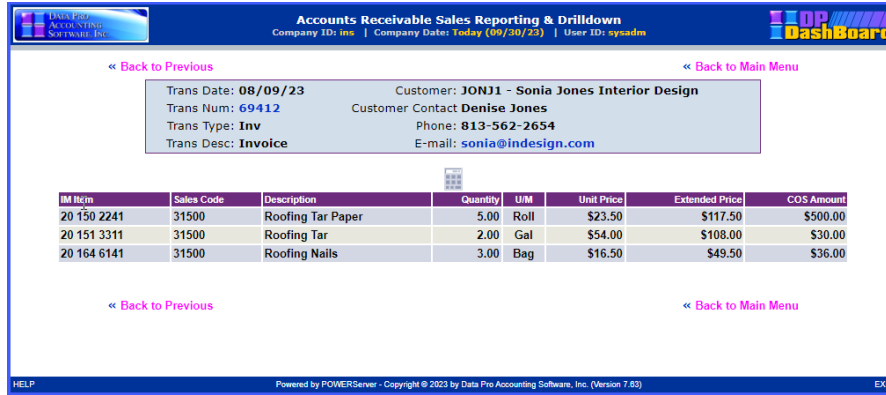
Accounts Receivable Aging & Drilldown
 Company ID: ins | Company Date: Today (09/30/23) | User ID: sysadm

Normal Aging based on Due Date

Customer Name: **Sonia Jones Interior Design** | Customer Contact: **Denise Jones**
 Customer Phone: **813-562-2654** | Customer E-mail: **sonia@indesign.com**

Date	Invoice #	Type	Description	Due Date	Amount
01/25/20	69185	Ret	Retainage	02/24/20	\$125.34
03/31/21	69071	Inv	Invoice	04/30/21	\$36,539.36
03/31/21	69071	Ret	Retainage	04/30/21	\$2,916.93
01/18/22	69384	Inv	Purchase for Job	02/17/22	\$416.94
08/09/23	69412	Inv	Invoice	09/08/23	\$275.00
Total:					\$40,273.57

View Aging: This will list Normal Aging by Due Date by Invoice Number.



IMPORTANT NOTE

If you do **NOT** want certain employees to see the **Cost Amount**, then you need to go into the **Infinity POWER Advanced Security Module**>Set Up Groups or Users, select By Option, select AR module. Turn off rights to **“Cost Inquiry.”** This will hide the COS Amount column in this drilldown report.

The following table describes the **Accounts Receivable invoice** drilldown report details:

Trans Date	Date of the transaction.
Transaction Num	Transaction number associated with the selected invoice.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the transaction as entered at time of billing.
Customer	Name of the customer.
Customer Contact	Name of contact for the customer.
Phone	Phone number of the customer.
E-mail	E-mail address of the customer contact.
IM Item	Inventory Management item.
Sales Code	Sales code associated with item.
Description	Description of the sale item.
Quantity	Quantity of the item.
U/M	Describes the unit of measure associated with the Quantity column.
Unit Price	Price per unit.
Extended Price	Total price charged for that line item.
COS Amount	Cost of sale amount.

Accounts Receivable Sales Reporting & Drilldown

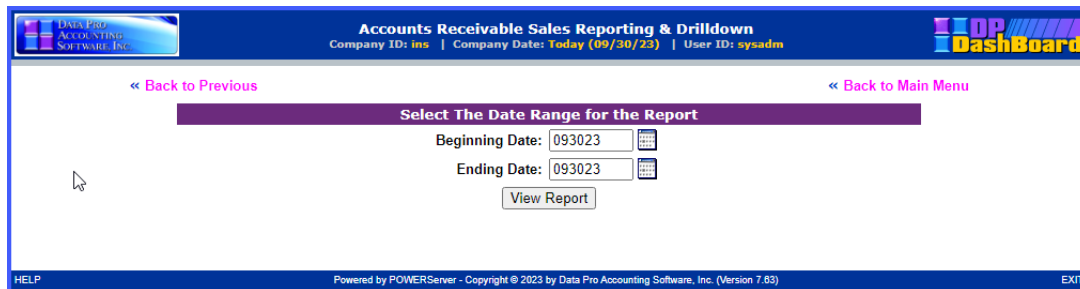
This option lists the receivable sales history for the active company selected. The Accounts Receivable Sales report provides a breakdown by supplier of all receivable items for a specified date range.



The following screen illustrates where the **Reports & Drilldowns>Accounts Receivable Sales Reporting & Drilldown** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Display an Accounts Receivable Sales Reporting Drilldown Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen System screen, select the **Accounts Receivable Sales Reporting & Drilldown** option from the Reports & Drilldowns section. The Accounts Receivable Sales Reporting & Drilldown screen displays.



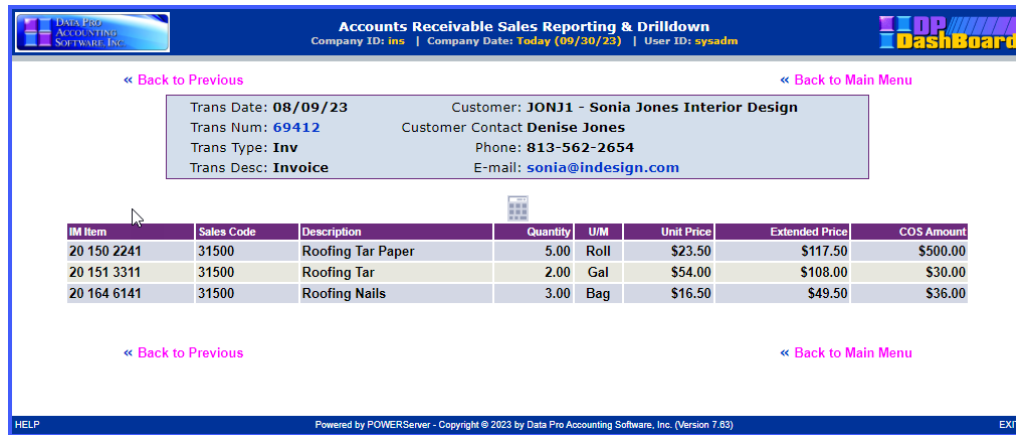
2. <Click> the calendar icon  next to the **Beginning Date** display box to open the calendar and select the desired date for the report date range. The calendar closes and the selected beginning date displays. Hint: <Click> on << to change the month or year prior to the current date, or <click> on >> to change the month or year after the current date.
3. <Click> the calendar icon  next to the **Ending Date** display box to open the calendar and select the desired date for the report date range. The calendar closes and the selected ending date displays. Hint: <Click> on << to change the month or year prior to the current date, or <click> on >> to change the month or year after the current date.
4. Select the desired report type (vouchers or checks) from the **Report Type** pull-down menu.
5. <Click the **View Report** button. The Sales Code Summary report displays listing all receivable sales items for the specified date range.

The following table describes the **Accounts Receivable Sales & Reporting Drilldown - Sales Code Summary** report details:

Date	Date of each sales transaction listed for the specified date range.
Trans #	Transaction number associated with each sales transaction.
Type	Describes the type of transaction for each one listed. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Customer	Name of the customer associated with each transaction listed.
Description	Describes the purpose of the transaction.
Sales Amount	Amount due from the customer associated with each transaction listed.
COS Amount	Cost of sale amount.
Pay/Dep Amount	Payment amount that has been received by the customer to the associated sales transaction listed.

To Drilldown by Transaction Number:

1. <Click> a component in the **Trans #** column of the Sales Code Summary report to drilldown by transaction number and display the next report level (e.g. 69073). The Accounts Receivable Sales Reporting & Drilldown screen displays with details on the selected transaction.



The following table describes the **Accounts Receivable Sales Code Summary** report transaction number drilldown report details:

Trans Date	Date of the transaction.
Transaction Num	Transaction number associated with the selected invoice.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the transaction as entered at the time of billing.
Customer	Name of the customer.
Customer Contact	Name of contact for the customer.
Phone	Phone number of the customer.
Email	Email address of the customer contact.
IM Item	Inventory Management item.
Sales Code	Code associated with the selected transaction.
Description	Describes the sale transaction (e.g. Contract Labor).
Quantity	Describes the cost per item or cost of service for each transaction listed. Display the “quantity” based on the Accounts Receivable Master Configuration settings
U/M	Describes the unit of measure associated with the Quantity column.
Unit Price	Price per unit purchased. Displays the “unit price decimal places” based on the Accounts Receivable Master Configuration settings.
Extended Price	Total price charged for that line item.
COS Amount	Cost of sale amount.
Amount	Total amount due from the customer for the selected transaction.

CUSTOMER SUPPORT

The **Customer Support Management** menu options from the **DP/DashBoard/CRM Menu System** screen, allow you to access and keep track of customer support traffic. Ticklers, support tickets, and customer profiles can be added, changed, and accessed from this main menu function. This assumes, however, that you have installed the **Infinity POWER Accounts Receivable (A/R)** module. Otherwise, most of these features will not be available.

These features are accessible in the **Customer Support** section of the **DP/DashBoard/CRM Menu System** screen.



Review/Add Ticklers

Ticklers are a handy way to keep track of customer support requests. When a customer calls in with a question or problem, an operator can create a tickler describing the issue at hand. This creates a record of that customer request, which can be accessed at any time for reference. While entering the tickler information, an operator has access to the customer's payment history, past due aging history, as well as previously taken notes on the customer (assuming the Accounts Receivable module is installed).

The following screen illustrates where the **Customer Support>Review/Add Ticklers** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Review a List of Ticklers:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Review/Add Ticklers** option from the Customer Support section. The **Review/Add Support Ticklers** screen displays listing existing tickler information.



The following table describes the **Review/Add Support Ticklers** screen details:

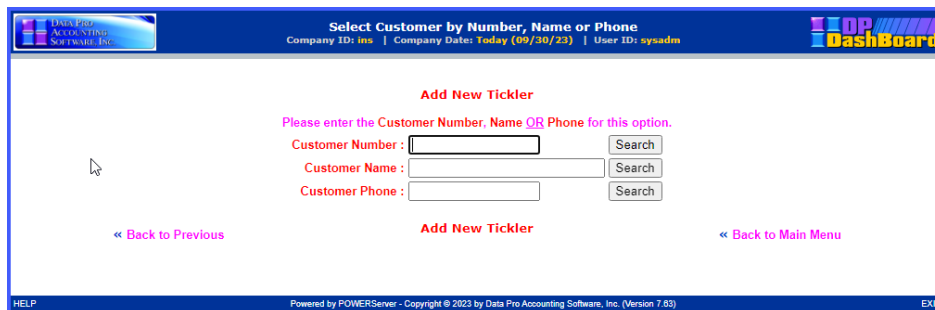
Date	Date tickler was created.
Rep	Describes which representative created the tickler.
Description (View/Edit)	Describes the customer problem or request. Clicking a component in this column opens the Add/Change Tickler screen.
Customer #	Identifying alpha/numeric characters associated with a customer name. Created when a new customer is added to the Accounts Receivable module.
Customer Name (Aging/Open Items)	Description of customer that reported the problem or request. Clicking a component in this column displays the Customer Aging/Open Items window. This lists the aging history of open items for the specified customer.
Phone #	Customer’s phone number.
Contact	Name of the main contact person for the customer account.
Ticket #	System generated number associated with the support ticket.
Comments	Describes any additional, relevant details pertaining to the tickler.

2. <Click> the **Display the Detail of All Ticklers** option to review specific details on all open ticklers.

To Add a New Tickler:

This option allows you to create a new customer support tickler.

1. From the **Review/Add Support Ticklers** screen, <click> the **Add New Tickler** option. The Select Customer by Number, Name or Phone screen displays.



2. Perform one of the following search options:
 - a. Enter the assigned customer number in the **Customer Number** text box.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER** program.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

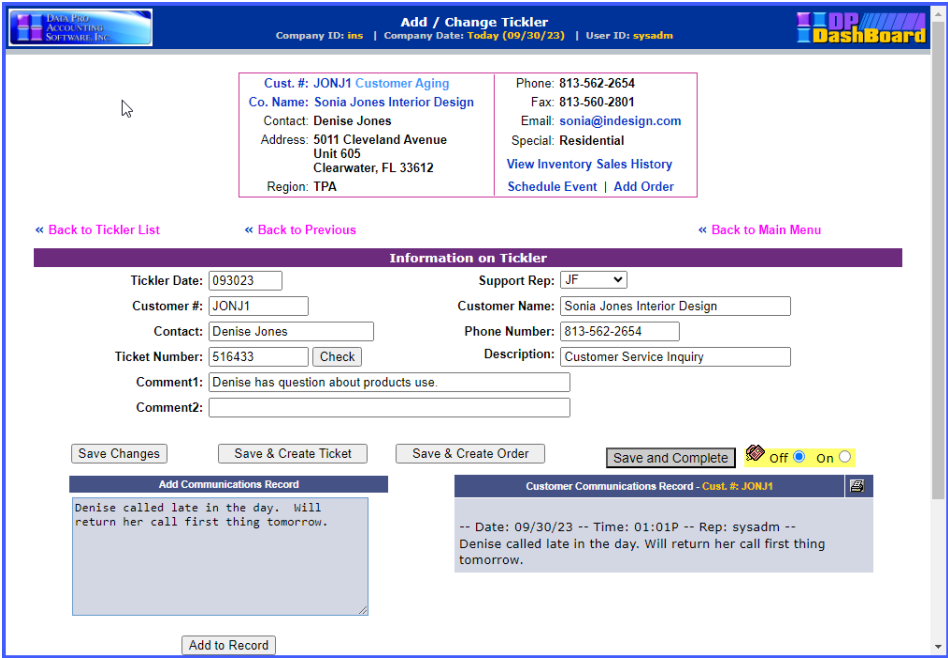
OR

- c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.

- 3. <Click> the **Search** button. The **Add/Change Tickler** screen displays providing all the known customer information in the appropriate fields.



The following table describes the **Add/Change Tickler** screen details:

Upper Section	
Cust. #	Number associated with the Customer. Clicking the actual customer number displays a complete payment history report for that customer which can be printed on demand. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer which can be printed on demand. New notes may also be entered at this point in the program.
Contact	Name of main contact person for the customer account.
Address	Mailing or Physical address of the company (Bill to Address:).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer's technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in "special" user defined field stored in each customer's mater record. The title of this field can vary depending on whether the user renamed this field in the Accounts Receivable Master Configuration.
View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Lower section	
Tickler Date	Date tickler was created.
Customer #	Number associated with the customer whom the tickler has been created.
Contact	Name of contact person for the customer.
Ticket Number	Number assigned to support ticket if one is created for that tickler.
Check	Click the check button to get status on a support ticket generated for that tickler.
Comment 1	Alpha/numeric text box (max of 50 characters). Enter important details regarding of the nature of the problem or request. Displays in the Comments column of the Review/Add Support Ticklers screen.
Comment 2	Alpha/numeric text box (max of 50 characters). Enter a description of the nature of the problem or request. This is displayed in the Open Support Ticklers window when the Display the Details of All Ticklers option is selected.

Support Rep	Describes the type or which support rep generated the tickler (e.g. public relations, in-house, etc)
Customer Name	Name of the customer.
Phone Number	Phone number of the customer.
Description	Describes the nature of the problem or request from the customer. Displays in the Description column of the Review/Add Support Ticklers screen.

4. Enter a description of the problem or request in the **Comments** text box.
5. Make any desired changes to the default information in the **Customer Information** section (e.g. the customer may now have a different contact person or phone number).
6. <Click> one of the following buttons to save the tickler:
 - a. <Click> the **Save Tickler** button. Add/Change Tickler screen closes and returns to the Review/Add Ticklers screen. The new tickler is now added to this screen.

OR

 - b. <Click> the **Save and Create Ticket** button to save the tickler and create a new customer support ticket. The Change/Add Ticket screen displays (see the To Add a Customer Support Ticket section).

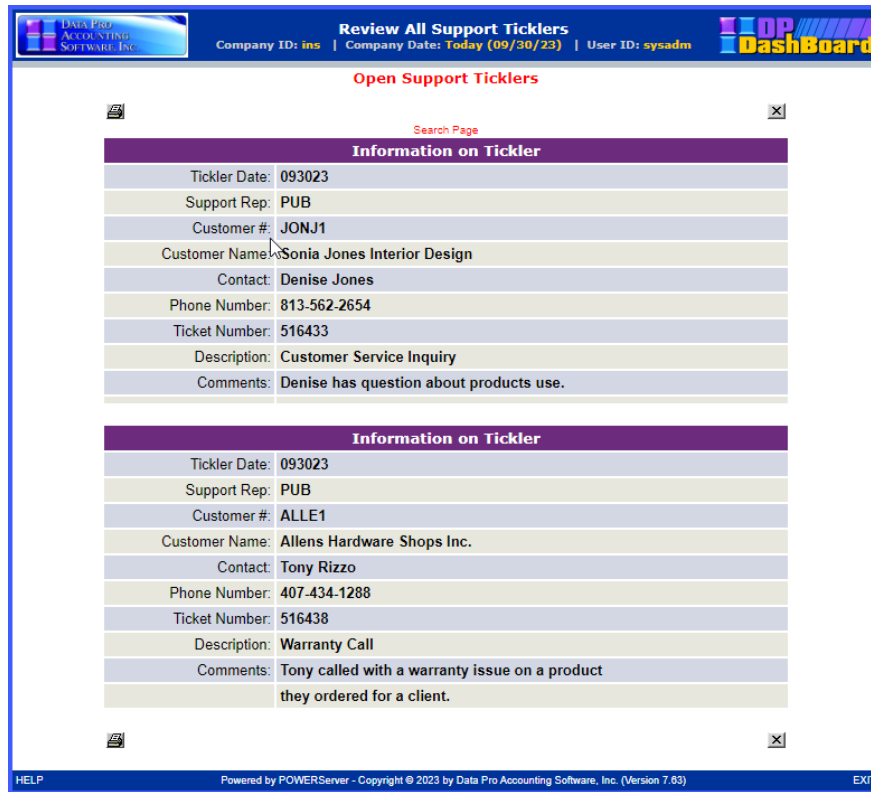
OR

 - c. <Click> the **Save and Complete** button to save the tickler and close it out. The tickler is removed from the list of ticklers in the Review/Add Support Ticklers screen.

To Review Tickler Details:



This option allows you to view the complete details for each tickler.

1. From the **Review/Add Support Ticklers** screen, <click> the **Display the Detail of All Ticklers** option. The Open Support Ticklers screen displays listing all details.



NOTE

To quickly find details on a specific tickler, use the **Search Page** option to perform a keyword search on this screen.

2. <Click> the  icon to print the details for all open ticklers.
3. <Click> the  icon to return to the Review/Add Support Ticklers screen.

To Modify a Tickler:

This function allows you to make changes to existing ticklers in the Information on Tickler section of the Add/Change Tickler screen.

1. From the **Review/Add Support Ticklers** screen, <click> the desired component in the **Description** column to open the tickler to be modified. The Add/Change Tickler screen displays.
2. Make any desired changes to the **Customer Information** section (e.g. the customer may now have a different contact person).
3. <Click> one of the following buttons to save the modifications to the tickler:
 - a. <Click> the **Save Tickler** button. Add/Change Tickler screen closes and returns to the Review/Add Ticklers screen. The new tickler is now added to this screen.
 - OR
 - b. <Click> the **Save and Create Ticket** button to save the tickler and create a new customer support ticket. The Save/Add Ticket screen displays (see the following section, Review/Add Customer Support Tickets).
 - OR

- c. <Click> the **Save and Complete** button to save the tickler and close it out. The tickler is removed from the list of ticklers in the Review/Add Support Tickets screen.

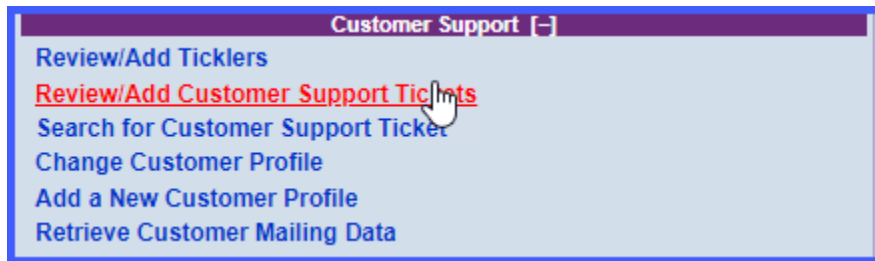
NOTE

When a tickler is removed from the list of open ticklers, it still remains in the **DP/DashBoard/CRM** system. The history can be retrieved for a specified customer only if it has been converted to a support ticket. Support tickets may be billable to a customer or not (i.e. warranty or pre-sale inquiries).

Review/Add Customer Support Tickets

Customer Support tickets are generated when the decision has been made that it is necessary to take action to satisfy a tickler. The time of each support call is recorded to manage billable support issues or for better call tracking purposes.

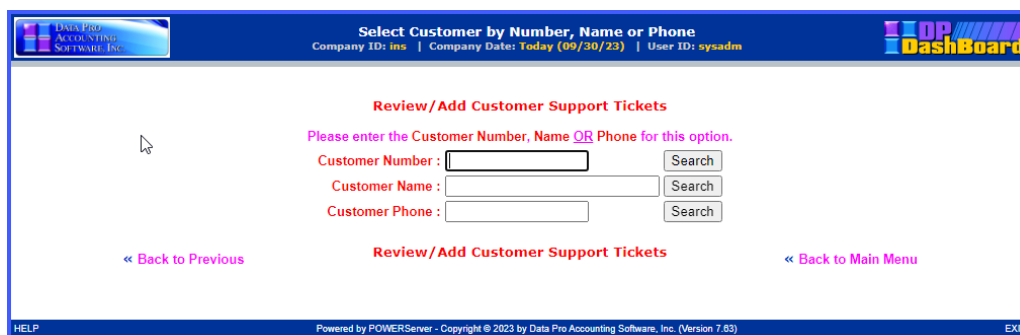
The following screen illustrates where the **Customer Support>Review/Add Customer Support Tickets** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Review/Add Customer Support Ticket:

This option allows you to review the support ticket history for a specified customer. You have the option of viewing all the tickets or just tickets from the prior year.

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays.



2. Perform one of the following search options:
 - a. Enter the assigned customer number in the Customer Number text box. <Click> the Search button. The Review Customer Support tickets screen displays listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER** program.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

OR

- c. Enter the phone number of the customer in the Customer Phone text box. The Search Customer screen displays. <Click> the desired customer from the Name column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

NOTE

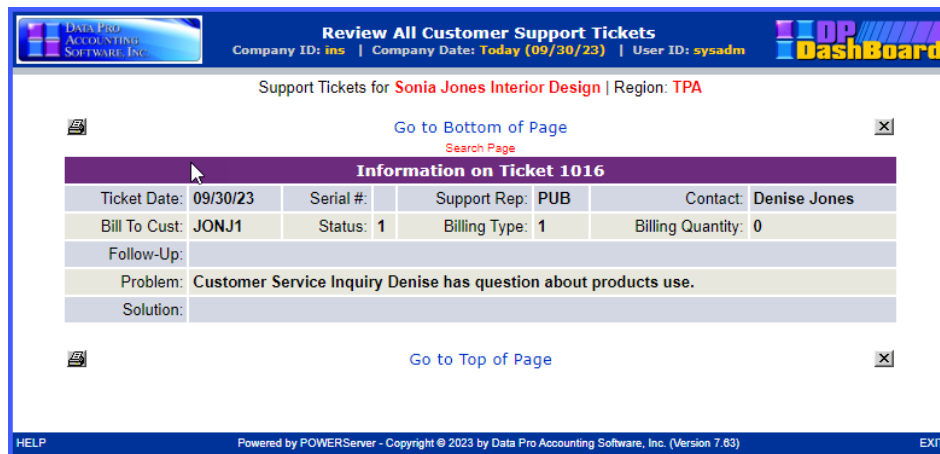
The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.







The following table describes the **Review Customer Support Tickets** screen details:

Cust. #	Number associated with the Customer. Clicking the actual customer number displays a payment history report for that customer. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Adding notes may be done through this option.
Contact	Name of the main contact person for the customer account..
Address	Mailing or Physical address of the company (Bill To Address).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer’s technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in “ special ” user defined field stored in each customer’s mater record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.
View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Add New Ticket	Displays the Change/Add Ticket screen.

3. <Click> the **Review All Tickets For** option to display the entire history of customer support tickets for the specified customer. The Review All Customer Support Tickets window displays.



4. <Click> the  icon to print the customer support ticket history.

5. <Click> the  icon to close this window and return to the Review Customer Support Tickets screen.
6. <Click> the **Review All Prior Year Tickets For** option to display the history of support tickets from the prior year only for the specified customer. The Review Customer Support Tickets for Prior Year window displays.
7. <Click> the  icon to print the customer support ticket history for the prior year.
8. <Click> the  icon to close this window and return to the Review Customer Support Tickets screen.

To Add a Customer Support Ticket:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays.
2. Perform one of the following search options:
 - a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Review Customer Support Tickets screen displays listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER** program.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

OR

- c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.

3. <Click> the **Add New Ticket** option. The Change/Add Ticket screen displays listing customer contact.

The screenshot displays the 'Change / Add Ticket' interface. At the top, it shows 'Company ID: inc', 'Company Date: Today (09/30/23)', and 'User ID: sysadm'. A customer information box contains details for 'JONJ1 Customer Aging', including contact name 'Denise Jones', address '5011 Cleveland Avenue, Unit 605, Clearwater, FL 33612', and phone/fax numbers. Below this, there are navigation links and a section titled 'Information on Ticket 1017'. This section includes fields for 'Ticket Date', 'Support Rep', 'Bill To Cust', 'Name', and 'Status'. There are also 'Problem' and 'Solution' text areas, 'Follow-Up' dropdown, 'Start Time', and 'End Time' fields. Billing information like 'Billing Type', 'Total Qty', and 'Billing Qty' is also present, along with 'Save This Ticket', 'Save and Create Order', and 'Contract Status' buttons.

The following table describes the **Change/Add Tickets** screen details:

Cust. #	Number associated with the Customer. Clicking the actual customer number displays a payment history report for that customer. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Previously written notes on that customer can be viewed, or new ones can be added.
Contact	Name of the main contact person for the customer account.
Address	Mailing or Physical address of the company (Bill to Address).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer’s technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in “special” user defined field stored in each customer’s mater record. The title of this field can vary depending on whether the user renamed this field in the Accounts Receivable Master Configuration.

View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Ticket Date	Take new ticket is generated. Defaults to current date.
Support Rep	Name of the support representative that handled the customer call.
Bill to Cust	Defines the Customer #. Defaults to the number assigned to that customer.
Name	Name of Customer.
New	Click the New button if this call should be changed to another customer's account. Therefore, the support can be provided to one customer and billed to another.
Serial:	This is the serial number of a product the call should be tracked against. These serial numbers are setup in the Customer Support Management application.
Contact	Name of the contact person who reported the problem or request.
Status	Describes the status of the support ticket as either Open, Resolved, or Updated.
Problem	Enter a description of the problem or request from the customer.
Solution	Enter a description of the solution if the issue is solved.
Follow Up	Describes follow up procedures for the support ticket. Pull-down menu options are Problem Resolved or Call Back.
Start Time	Start time of the support call at the point the decision is made to create a ticket.
End Time	End time of the support call. Click the Set Time button to have the system automatically enter the ending time.
Billing Type	Describes the method of billing that will be applied to the customer.
Total Qty	Click the Calculate button to calculate the total billable time for the support call. Time is based on the start time and end time of the call.
Billing Qty	Calculates the billing amount to be applied to the customer.
Contract Status	Status of the customer technical support contract. EXP shows the customer has expired their pre-paid technical support minutes. Clicking the check button will force a search for a current update to this field.

4. Select your name/initials from the **Support Rep** pull-down menu to identify you created the support ticket.
5. Enter the customer contact person reporting the problem or request in the **Contact** text box.
6. <Click> the **Contract Status Check** button at the bottom right of the screen to determine if the customer has either an active, close to expiring, or expired contract.

NOTE

It is recommended to check the status of the contract in the beginning of the call so that the customer can purchase additional support minutes if necessary.

7. Enter a detailed description of the problem or request in the **Problem** text box.

8. Enter a detailed description of the recommended solution in the **Solution** text. In both cases, remember to be thorough. Many times, these entries can be the only history of what occurred and could be used in legal disputes.
9. Select the appropriate category from the **Status** and Follow-Up: pull-down menus.
10. When the call is complete, click the **Set Time** button to record the end time of the customer support call. The current time displays in the End Time display box.
11. Select the appropriate method of billing to be applied to the customer from the **Billing Type** pull-down menu.
12. <Click> the **Calculate** button to automatically calculate the total minutes of the support call. The Billing Qty: text box displays the amount calculated in the Total Qty: text box and applies the specified billing rate per minute 3.5 for \$3.50/minute).

NOTE

The billing rate depends on the status of the contract. You can manually change this rate by entering a new rate in place of the default rate.

13. Click the **Save This Ticket** button. A confirmation message displays that the support ticket record has been updated and returns to the **Customer Support Ticket** screen, which now displays the new ticket.

To Change a Customer Support Ticket:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays.
2. Perform one of the following search options:
 - a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The **Review Customer Support Tickets** screen displays listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

OR

- c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays listing any tickets.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.

3. In the **Ticket #** column, <click> on the ticket you want to change. The Change/Add Ticket screen displays listing details on the support ticket specified.
4. Make any desired changes to the ticket information.
5. <Click> the **Save This Ticket** button.

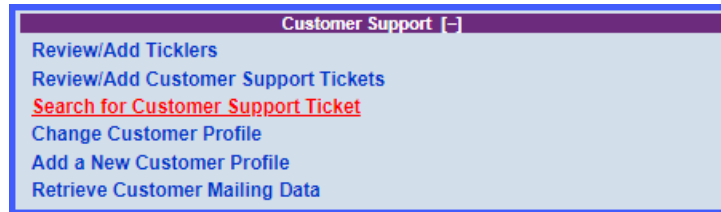
NOTE

Changes cannot be made to tickets that have had their status changed to **“updated.”**

Search for Customer Support Ticket

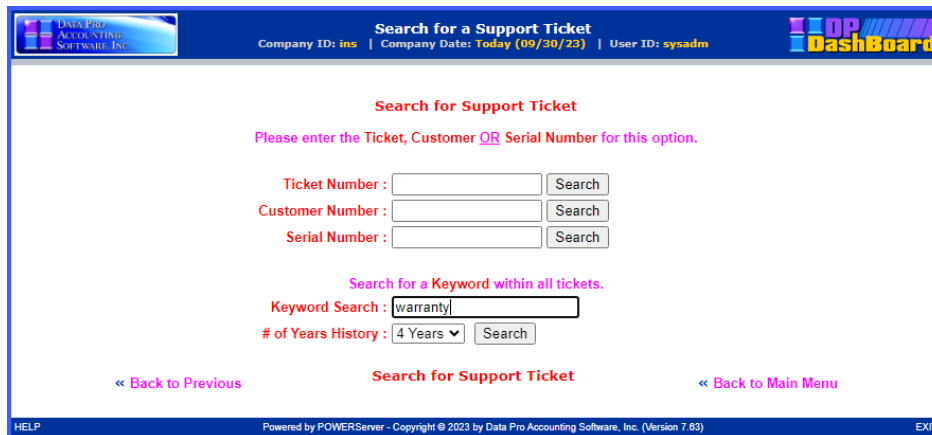
This option allows you to search for a customer support ticket by entering the associated ticket, customer, or serial number. You can also search by keyword.

The following screen illustrates where the **Customer Support>Search for Customer Support Ticket** option is located on the **DP/DashBoard/CRM** Menu System screen.



To Search for a Customer Support Ticket:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Search for Customer Support Ticket** option from the Customer Support section. The Search for Support Ticket screen displays.



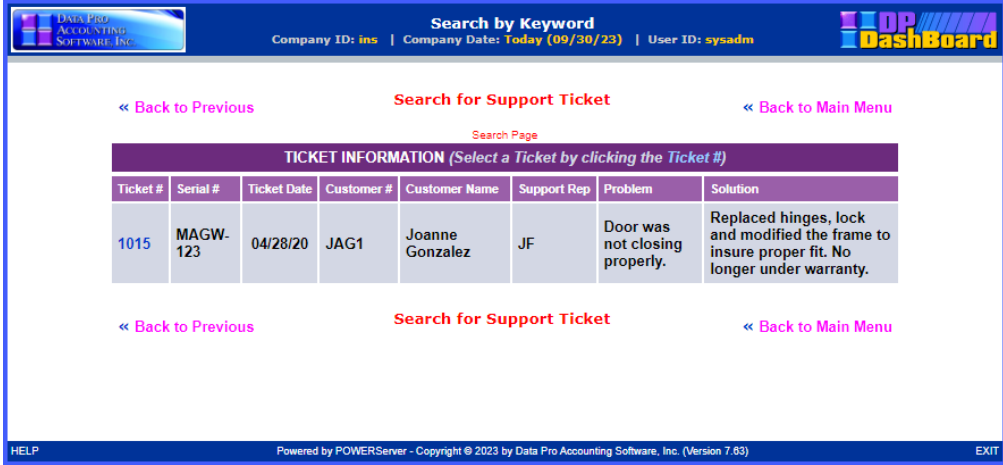
2. Perform one of the following search options:
 - a. Enter the appropriate information in the **Ticket Number**, **Customer Name**, or **Serial Number** text box.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module.

OR

- b. Enter a keyword in the **Keyword Search** text box and select the desired duration from the **# of Years History** pull-down menu.
3. <Click> the corresponding **Search** button. The Ticket Information screen displays a listing of all the associated support tickets.

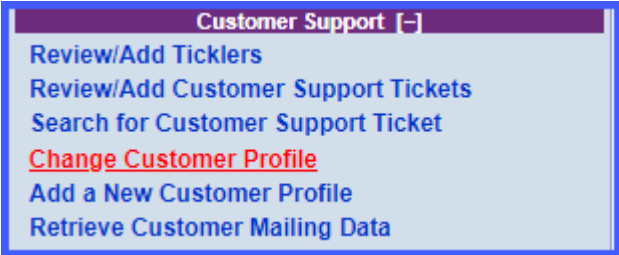


4. Select the desired support ticket listed in the **Ticket #** column. The details of the selected support ticket display.

Change Customer Profile

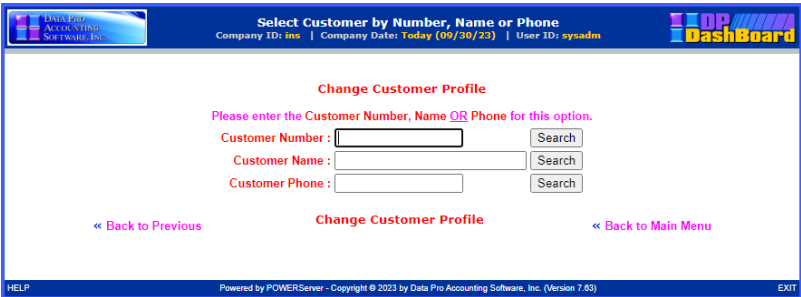
Profile information on customers can be modified, if necessary. This function also allows you to view a specific customer’s aging history, payment history, or add detailed notes.

The following screen illustrates where the **Customer Support>Change Customer Profile** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Change a Customer Profile:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Change Customer Profile** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays.



2. Perform one of the following search options:
 - a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Change Customer Profile screen displays.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Change Customer Profile screen displays.

OR

- c. Enter the phone number of the customer in the **Customer Phone** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Change Customer Profile screen displays.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module (i.e. use of dashes versus parenthesis).

The following table describes the **Change Customer Profile** screen details:

Show or Hide Ship-To	Toggles between displaying and hiding the customer’s ship-to address. The Ship-To address can be modified by clicking on this option.
Customer Name:	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Adding notes may be done through this option.
Address 1	Primary mailing or physical address of the company (Bill To Address).

Address 2	Alternate mailing address of the company (Bill To: Address).
City	City associated with the address provided in Address 1 text box.
State	State associated with the address provided in the Address 1 text box.
Zip Code	Zip code associated with the address provided in the Address 1 text box.
Country	Country associated with the address provided in the Address 1 text box.
Contact	Name of the main contact person associated with the customer account.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in “ special ” user defined field stored in each customer’s master record. The title of this field can vary depending on whether the user renamed this field in the Accounts Receivable Master Configuration.
Salesman Number	Pull-down menu. Select the salesman associated with the customer. The Salesman Number is set up in the accounting system. Defaults to House.
Sales Tax Code	Pull-down menu. Select the sales tax code associated with the customer. The Sales Tax Code is set up in the accounting system. Defaults to 99 – Exempt.
Salutation	Pull-down menu. Select the appropriate salutation for main contact person of the customer account.
Title	Title of the main contact person of the customer account.
First Name	Full first name of the main contact person associated with the customer account.
Middle Name	Middle name of the main contact person associated with the customer account.
Last Name	Last name of the main contact person associated with the customer account.
Alt. Phone	Alternate phone number of main contact person.
Ext	Phone extension associated with the Alt. Phone number provided.
Cell Phone	Cell phone number of the main contact person of the customer account.
Bus. Type	Pull-down menu. Select from user defined business types.
Tax Id	Tax ID number for the customer.
Mail	Select either Yes or No to permit sending direct mail to the main contact person.
E-Mail	Select either Yes or No to permit sending e-mail to the main contact person of the customer account.
Fax	Select either Yes or No to permit sending faxes to the main contact person of the customer account.
View Customer Aging	Select this option to view aging and open items on the customer.
View/Add Notes Detail	Select this option to view or add notes to the customer profile.

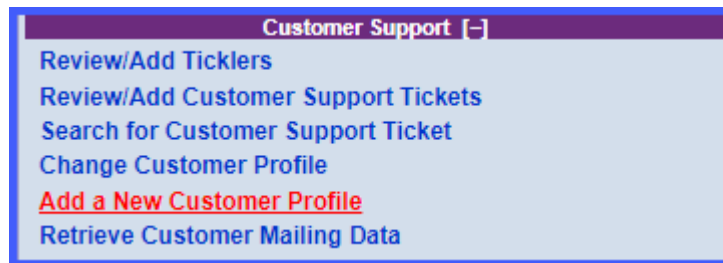
View Customer Payment History	Select this option to view the customer's complete payment history.
Inventory Sales History	Select this option to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail.
Schedule New Event	Select this option to schedule an event for this customer in the Event Calendar.
Copy Customer to Company	Select this option to copy a customer to another company. Since DP/DashBoard/CRM supports multiple companies, this is an ideal function for telemarketing purposes whereby management may want to import or download lists of prospects from trade shows, mailing databases and other sources of leads whereby internal staff can utilize the various DP/DashBoard/CRM tools to call and schedule appointments and follow-up with leads. Once a lead is formalized in a separate "lead" company, this option is ideal for transferring the customer record and related information into the firms main Accounts Receivable Customer Database. Normally, firms will not want to import hundreds or thousands of prospect names into their main database until some kind of relationship is established with a new lead. This option makes this a truly seamless process!
Add New Contact	Select this option to add another customer contact.

3. Make any desired changes to the customer profile.
4. <Click> the **Show or Hide Ship-To** option to modify the customer's shipping address. The Ship-To window displays. Clicking the Save button in this window saves the changes and returns you to the **DP/DashBoard/CRM Menu System** screen.
5. <Click> the **Save** button to update the system with the new customer information. A message displays confirming the record has been updated and returns to the **DP/DashBoard/CRM Menu System** screen.

Add a New Customer Profile

This option allows you to add new customers into the **DP/DashBoard/CRM** system. Customers added here are automatically added to the **Infinity POWER Accounts Receivable** module.

The following screen illustrates where the **Customer Support>Add a New Customer Profile** option is located on the **DP/DashBoard/CRM Menu System** screen.

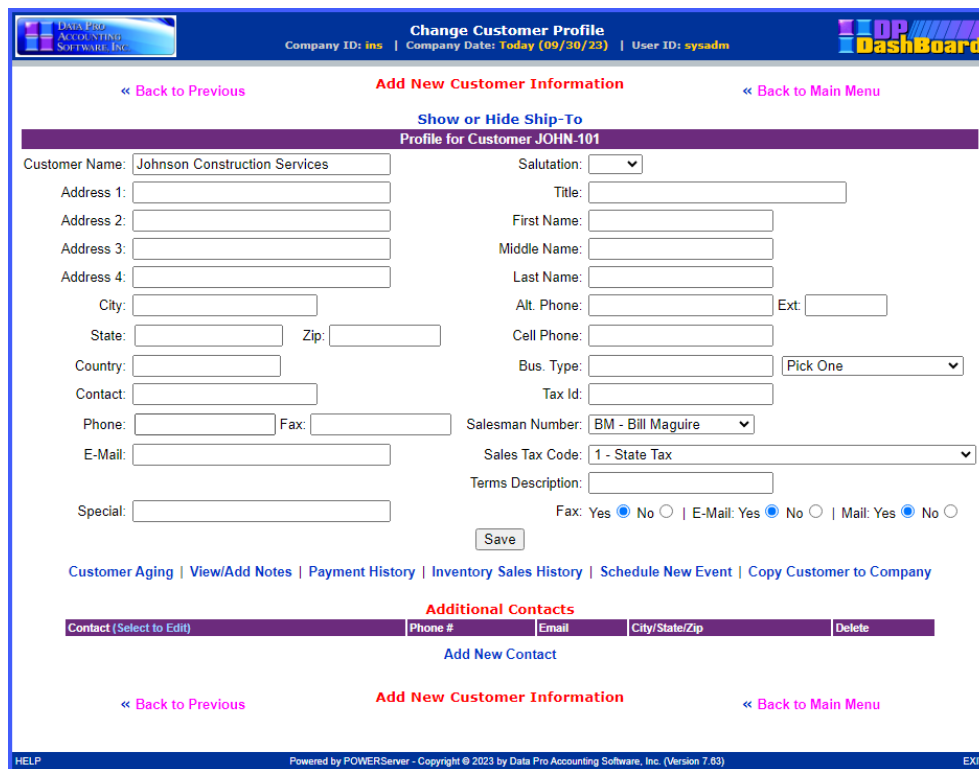


To Add a New Customer Profile:

1. In the center of the DP/DashBoard/CRM Menu System screen, select the **Add a New Customer Profile** option from the Customer Support section. The **Add a Customer** screen displays.



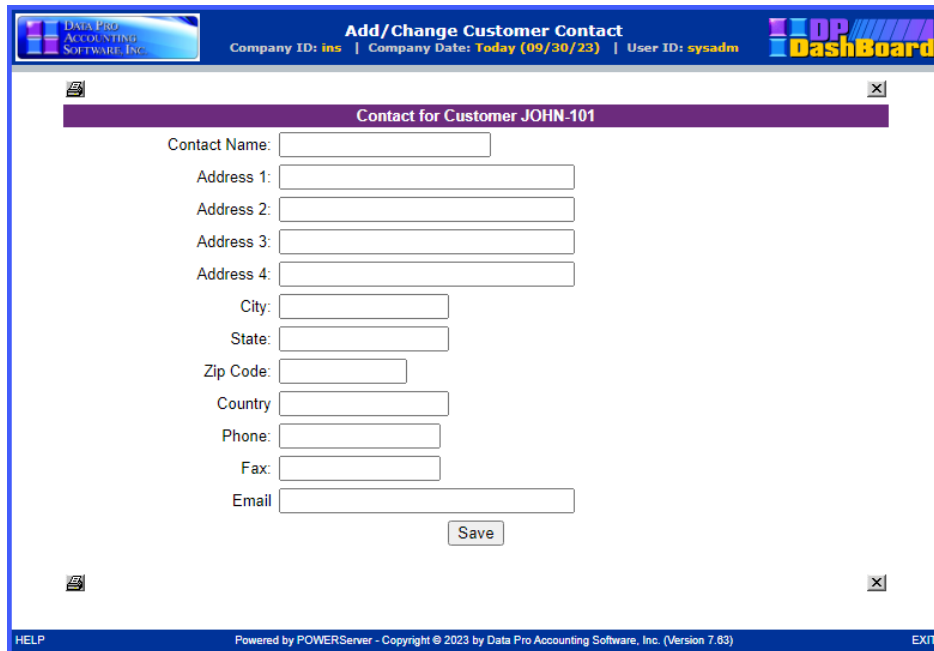
2. Enter a new customer number in the **Customer Number** text box that identifies the customer. The customer number may consist of a maximum of ten (10) alpha/numeric characters.
3. Enter the name of the customer in the **Customer Name** text box. The **Customer Name** may consist of up to thirty (30) alpha/numeric characters.
4. <Click> the **Add this Customer** button. The **Change Customer Profile** screen displays.



5. Enter the **Contact Information** for the customer in the appropriate text boxes and pull-down menus.
6. Select the additional customer contact preferences from the **Mail**, **E-mail**, and **Fax** radio buttons. These fields can be used in sorting customer lists to include for mailings and such.
7. <Click> the **Save** button. A message displays confirming that the customer record has been updated, closes, and returns the **DP/DashBoard/CRM Menu System** screen.

To Add Additional Contacts:

1. From the **Change Customer Profile** screen, <click> the **Add New Contact** in the Additional Contacts section of the lower portion of the screen. The **Add/Change Customer Contact** screen displays.



2. Enter the **Contact Information** for the additional customer contact in the appropriate text boxes.
3. <Click> the **Save** button. The **Add/Change Customer Contact** screen closes and the new contact information displays in the Additional Contacts section of the Change Customer Profile screen.

Retrieve Customer Mailing Data

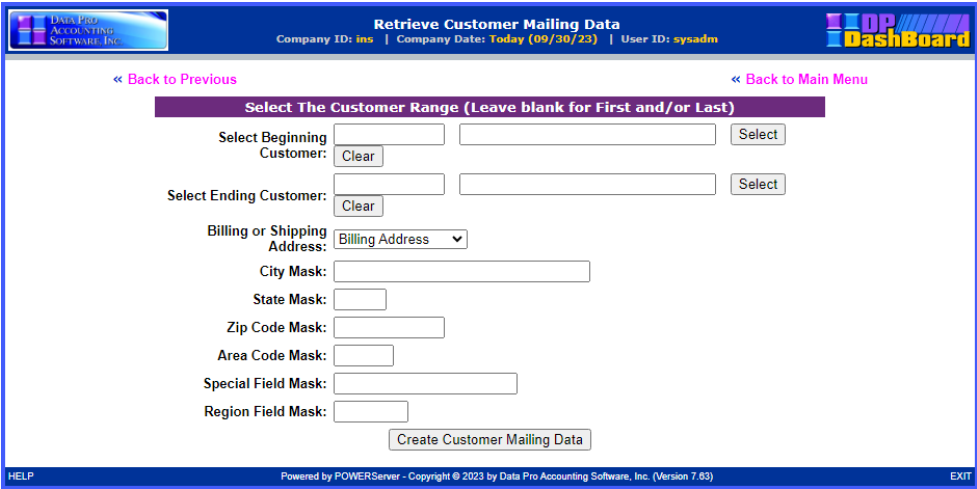
This option allows you to extract customers from the **DP/DashBoard/CRM** system for the purposes of generating mailing labels and mail merges.

The following screen illustrates where the **Customer Support>Retrieve Customer Mailing Data** option is located on the **DP/DashBoard/CRM Menu System** screen.

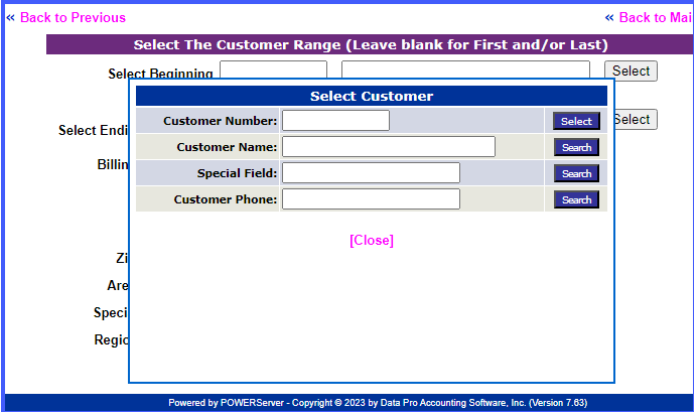


To Retrieve Customer Mailing Data:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Retrieve Customer Mailing Data** option from the Customer Support section. The following screen displays.



2. The screen is prompting for a Beginning and Ending Customer Number. Click on the “**Select**” button on the right side of the screen to pop up a screen that will prompt you for one of four fields in which you may enter your beginning customer number as shown below:



3. If there is a “**near match,**” the following screen will appear:

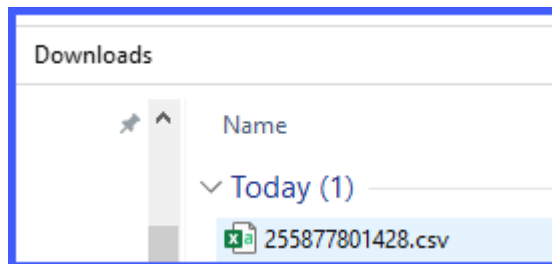


4. Next, you will choose whether to extract the **Billing Address** or the **Shipping Address** for each customer selected.

- The remaining fields are “Masks” options, which means you have the ability to specify specific choices of Customers based on City locations, States, Zip Codes, Phone Number Area Codes, the Special Field in the Customer Master Record and the Region Field in the Customer Master Record. This provides you powerful extraction capabilities to target your mailings to specific customer groups, by proximity or categories.
- The screen below illustrates an example using the Mask feature implementing “FL” for the state of Florida.

Customer #	Customer Name	Address	City	State	Zip	Phone	Special	Region
JONJ1	Sonia Jones Interior Design	5011 Cleveland Avenue	Clearwater	FL	33612	813-562-2654	Residential	TPA
NAT11	National Auto Parts	201 E. Kennedy Blvd.	Tampa	FL	33601	813-224-5697	Commercial	TPA
SWIS1	Tony Swiss Construction	1302 Central Avenue	St. Petersburg	FL	33714	813-866-3928	Residential	TPA

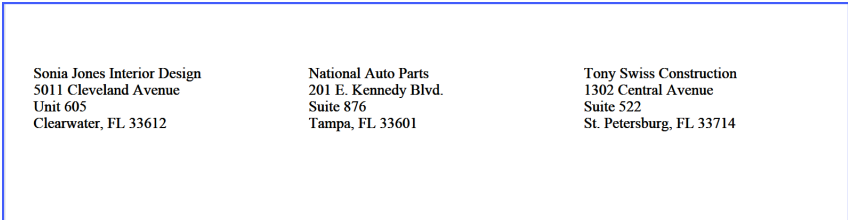
- Notice, highlighted in red on the prior screen that you can now “Download Customer List for Mailing Labels” or “Download PDF Mailing Labels.” If you select the first option, an Excel “csv” file will be generated for use with mail merges.



- It will have the following file layout:

	A	B	C	D	E	F	G	H
1	CONTACT	NAME	STREET	STREET2	CITY	STATE	ZIP	
2	Denise Jones	Sonia Jones Interior Design	5011 Cleveland Avenue	Unit 605	Clearwater	FL	33612	
3	Jeff Williams	National Auto Parts	201 E. Kennedy Blvd.	Suite 876	Tampa	FL	33601	
4	Tony Swiss	Tony Swiss Construction	1302 Central Avenue	Suite 522	St. Petersburg	FL	33714	
5								

- 9. If you select the second option, the system will generate a **“PDF”** file that is specifically designed to print on **Avery 5160 Mailing Labels** on a LaserJet printer.



SALES & PURCHASING

The Sales & Purchasing menu options from the **DP/DashBoard/CRM Menu System** screen, allow you to add new sales orders via a web-based data entry system, view existing sales orders, view existing purchase orders, and perform inventory item inquiries. This assumes, however, that you have installed the **Infinity POWER Sales Order Entry (SO)** module, **Purchase Order Entry (PO)** module, and **Manufacturing Inventory Management (IM)** module. Otherwise, most of these features will not be available.

These features are accessible in the **Sales & Purchasing** section of the **DP/DashBoard/CRM Menu System** screen.



Add New Sales Order

When a customer calls in with a purchase request, a Sales Representative can add a sales order right from the web. This creates a record of that customer request, which can be accessed at any time for reference. While entering the Sales Order, the sales representative has access to the customer's payment history, as well as previously taken notes on the customer's account. Additionally, users can perform an inquiry on any previously entered order in the system for that customer using the View an Existing Sales Order option.

The following screen illustrates where the **Sales & Purchasing>Add New Sales Order** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Add a New Sales Order:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Add New Sales Order** option from the Sales & Purchasing section. The Add New Sales Order> Select Customer by Number, Name or Phone screen displays.



2. Perform one of the following search options:
 - a. Enter the assigned customer number in the **Customer Number** text box and <click> the **Search** button.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER** program.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box and <click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

OR

- c. Enter the phone number of the customer in the **Customer Phone** text box and <click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.

The **Add New Sales Order** screen displays providing all the known customer information in the appropriate fields. If the customer has “**Multiple Ship To: Addresses**” set up, the first prompt will be to define which location the order should be shipped to.



The following table describes the **Add New Sales Order** screen details:

Change Shipping	Click this option to change the customer shipping address for this particular sales order. Make any desired changes to the customers shipping address and click the Save & Continue button.
Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Salesman	Name of the salesman executing the sales order request.
Customer PO	Enter the purchase order number associated with this sales order.
Freight Amount	Enter the freight amount, if applicable.
Job #	Enter the Job # if this Sales Order is to be posted to job with revenues and cost amounts flowing from the inventory items. This assumes the inventory items have Job Cost Codes predefined for this to be possible. Click on the “Select” button to pop up a screen to enter the job #, job description of special field and select a valid Job #.
Order Type	This is where you can select the “Type” of sales order to be entered. Valid choices are: Normal, Auto Cancel, Special Order, Drop Ship, Proposal or Return Authorization. See the Sales Order Entry manual for specific details on each.
Order Date	Date the sales order is entered into the system.
Discount %	Percentage of discount applied to that particular sales order.
Description	Description of the sales order.
E-mail	E-mail address of the customer.
Terms	Payment terms for this order. Defaults to standard terms defined in customer’s file.
Order Status	This field can be used for updates from vendors on orders, but this is also commonly used in the integration with the DP/AUTO scripts for UPS WorldShip and FedEx Ship Manager . The terms “UPS” and “FedEx” will trigger this sales order information to be automatically exported to the respective shipper.

Ship Via	This is a pull-down list of available shipping methods. This is only available if there is a text file placed in your DashBoard/CRM folder called ShipVia.txt . This text file can contain the list of possible shipping methods. If the file does not exist (by default), the display does not have a drop-down list of options. Otherwise, it is just an open field for the user to enter their choice of shipping methods.
View/Add Notes	Clicking this option opens the View All Notes For This Customer screen. Any previous notes on the customer display. From this screen, you can add a new note to the customer profile.
View Inventory Sales History	Clicking this option opens the Customer Inventory Sales History screen. This option allows you to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail. From the selected customer's sales history, previously ordered items can be selected and a new sales order can be created.
View Customer Payment History	Clicking this option opens the Customer Payment History screen displaying a full payment history with transaction details. From this screen you can also view the aging on the customer, add notes, send e-mail to the customer, and schedule a new event.

3. Enter the desired information in the appropriate fields.

4. <Click> the **Continue** button. The Sales Order detail screen displays reflecting the data entered on the previous screen.

NOTE

A warning will display if the customer has a past due balance or if they are over their credit limit.



The following table describes the **Sales Order Detail** screen details:

UPPER SECTION	
Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Salesman	Name of the salesman executing the sales order request.
Description	Description of the sales order.
Order Date	Date the sales order is entered into the system.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Terms	Payment terms for this order. Defaults to standard terms defined in customer's file.
Customer PO	Associated purchase order number for the customer.
<< Change Order Header Info	Clicking this option opens the Add Sales Order Screen. Make the desired edits to any of the fields such as date, description, etc.
LOWER SECTION	
Part Number	Part number of the inventory item(s) being purchased.
Description	Description of the inventory item.
U/M	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Quantity	Number of items purchased for that particular inventory item.
Price	Price of the inventory item.
Totals	Total amount due for all items being purchased including applied discounts and freight charges.
Add New Inventory Item	Clicking this option opens the Select Inventory Item option and allows you to add additional inventory items to the current sales order.
Clear Order Detail	Clicking this option clears the Sales Order Detail values without saving the sales order.
Save Detail	Clicking this option saves the current Sales Order.

4. <Click> the **Add New Inventory Item** button to add inventory items to the sales order. The Select Inventory Item screen displays.

5. Enter the first few numbers or the entire inventory number in the **Inventory Item Number** text box, then <click> the **Select** button.

OR

6. Enter a keyword in the **Inventory Item Description** text box, then <click> the **Search** button. The **Select an Inventory Item** screen displays listing all the available items that are a match with the keyword.

The **Select Inventory Items** screen displays listing the available inventory items including details such as part number, description, bin number, and category.

ITEM INFORMATION (Select an Item by clicking Select)				
Inventory Item	Description	Bin #	Category	Select
60 7 131	Electric Box - Fuses	300		Select
11 A POLE	Electric Box Pole	242		Select
60 8 126	Electric Box Pole Stand	310		Select
40 801 6134	Electrical Outlet Box	289		Select

7. Choose the desired inventory item from the list and <click> the **Select** button. The **Get Inventory Item** screen displays details of the selected inventory item such as item number, description, U/M, quantity and price.

Item #	Item Description	U/M	Quantity	Price	Discount %
60 7 131	Electric Box - Fuses	EA	1.00	3.56	0.000

Select This Item

Quantity On-Hand: 30.00
 Quantity Reserved: 0.00
 Quantity On Order: 0.00
 Quantity Available: 30.00

8. Enter the desired Quantity, Price, and Discount (*if turned on*) for the item, then <click> the **Select This Item** button. The **Sales Order Detail** screen is updated to include the selected inventory items and calculates the order total. Continue to add as many inventory items as desired.



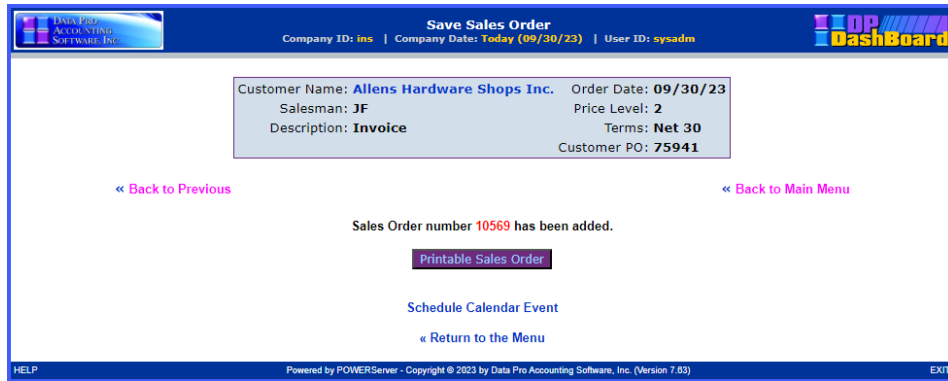
NOTE

To edit an item on the order, <click> the **Part #** to make edits to that item. To remove an item from the order, <click> the red **X** next to the Total column of the item to be removed.

9. <Click> the **Save Order** button to save all selections to this sales order. The Save Sales Order screen displays. Notice that they system automatically generates a sales order number for the sales order. Click on the **“Printable Sales Order”** button to generate a PDF version of the Sales Order than can be printed, e-mailed or e-faxed to a customer.

NOTE


If a deposit is required for a particular order, you will be prompted to provide the appropriate payment information such as Payment Type, Credit Card #, Expiration Date, and Cardholder’s Name. You will then be prompted to post the deposit.



The following table describes the **Save Sales Order** screen details:

Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Salesman	Name of the salesman executing the sales order request.
Description	Description of the sales order.

Order Date	Date the sales order is entered into the system.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Terms	Payment terms for this order. Defaults to standard terms defined in customer's file.
Customer PO	Associated purchase order number for the customer.
Printable Sales Order	Clicking this button opens a PDF reader on your computer. This may be printed, e-mailed or e-faxed to your customer or for your records.
Schedule Calendar Event	Clicking on this button allows you to use the Calendaring feature to schedule an activity in regards to this Sales Order. That may be a follow up call, customer service checkup or whatever. It's like any other calendaring option that it built in to the DP/DashBoard/CRM feature.



Infinity POWER Sample Company, Inc.
111 2nd Avenue NE
Suite 360
St Petersburg FL 33701 USA
Phone: 727-803-1500

SALES ORDER RECEIPT

DATE	SALES ORDER NO.
09/30/23	10569
ACCOUNT NO.	SALESMAN NO.
ALLE1	JF

BILL TO

Allens Hardware Shops Inc.
400 E. Kennedy Blvd.
Orlando, FL 33421

SHIP TO

Allen's Hardware Shops Inc.
400 Palm St.
Tampa, FL 33610

DESCRIPTION	ORDER DATE	CUSTOMER P.O. NO.	SALES ORDER NO.	SHIPPING INSTRUCTIONS
Invoice	09/30/23	75841	10569	UPS Ground

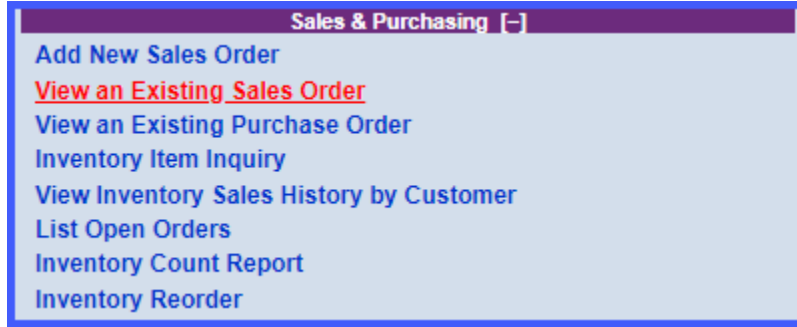
QTY	U/M	PART #	DESCRIPTION	UNIT PRICE	DISC %	EXTENSION
4.00	EA	607 131	Electric Box - Fuses	\$3.56	0.000	\$14.24
1.00	EA	40 801 6134	Electrical Outlet Box	\$131.79	0.000	\$131.79
1.00	EA	11 A POLE	Electric Box Pole	\$191.47	0.000	\$191.47

REMIT PAYMENT TO:	TERMS: Net 30	SALE AMOUNT	\$337.50
Infinity POWER Sample Company, Inc. 111 2nd Avenue NE Suite 360 St Petersburg FL 33701 USA ALL FUNDS PAYABLE IN U.S. DOLLARS		DISCOUNT	\$16.88
		TAX	\$1.66
		FREIGHT	\$22.14
		SUBTOTAL	\$344.42
		DEPOSIT	\$0.00
		TOTAL DUE	\$344.42

View an Existing Sales Order

This option allows you to view existing sales orders. You can search sales orders by sales order number, customer number, customer name, or purchase order number.

The following screen illustrates where the **Sales and Purchasing>View an Existing Sales Order** option is located on the **DP/DashBoard/CRM Menu System** screen.



To View an Existing Sales Order:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **View an Existing Sales Order** option from the Sales & Purchasing section. The View a Specific Sales Order > Enter Sales Order, Customer Number, Name or Purchase Order screen displays.



2. Enter either the full or partial Sales Order, Customer Number, Customer Name, or Purchase order then <click> the **Search** button. The Search Customer screen displays listing the search results including the following details: order date, customer name, purchase order #, and sales order #.



3. Select the desired sales order to view by clicking on the **Sales Order #**. The View Sales Order Detail screen displays with all the details of the selected sales order including customer profile, shipping address, and details on selected inventory items.

From here, you can view the sales order details, print the sales order, print a packing list, create a new order from this sales order, post a deposit, modify this order, schedule a calendar event or return to the previous screen or return to the main menu.

View an Existing Purchase Order

This option allows you to view existing purchase orders. You can search sales orders by sales order number, customer number, customer name, or purchase order number.

The following screen illustrates where the **Sales and Purchasing> View an Existing Sales Order** option is located on the **DP/DashBoard/CRM Menu System** screen.

To View an Existing Purchase Order:

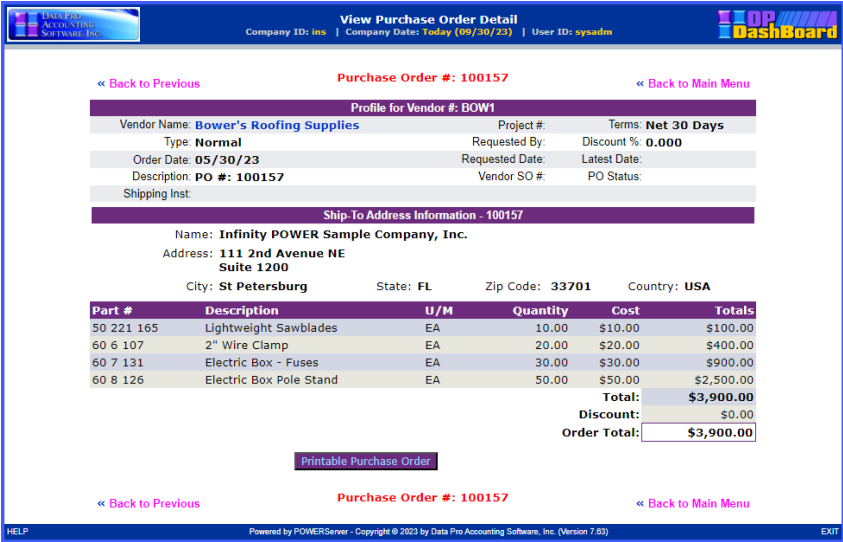
1. In the center of the **DP/DashBoard/CRM Menu System** screen select the **View an Existing Purchase Order** option from the Sales & Purchasing section. The View a Specific Purchase Order > Enter Purchase Order, Vendor Number, Name or Vendor Sales Order screen displays.



2. Enter the desired Purchase Order, Vendor Number, Name, or Vendor Sales Order, then <click> the **Search** button. The Search Vendor screen displays listing the search results including the following details: order date, customer name, purchase order #, and sales order #.



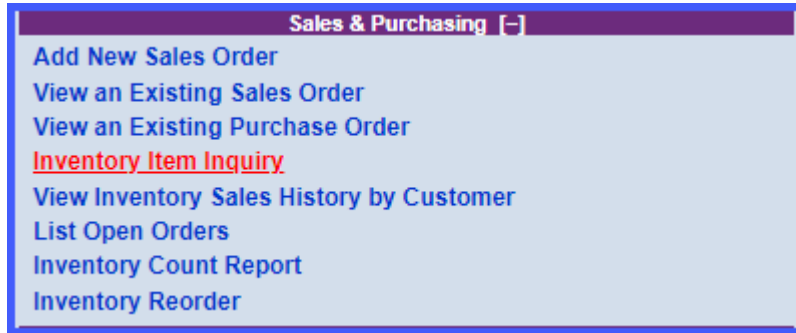
3. Select the desired purchase order to view by clicking on the **Purchase Order #**. The View Purchase Order Detail screen displays with all the details of the selected purchase order including customer profile, shipping address, and details on selected inventory items.



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.

The following screen illustrates where the **Sales and Purchasing > Inventory Item Inquiry** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Perform an Inventory Item Inquiry:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Inventory Item Inquiry** option from the Sales & Purchasing section. The Select Inventory Item screen displays.

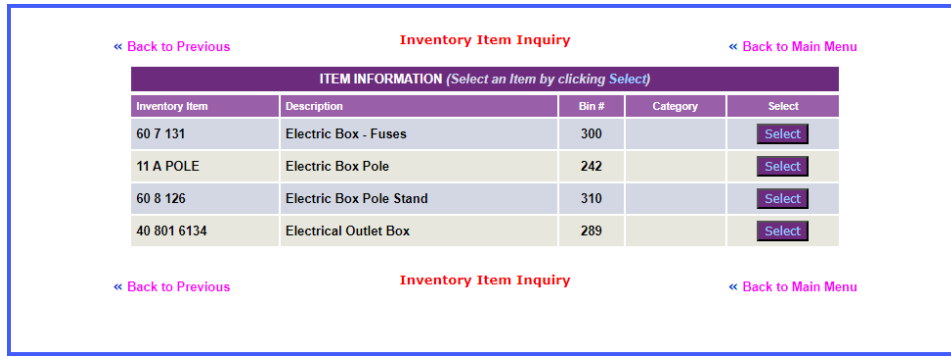


2. Enter the first few numbers or the entire inventory number in the **Inventory Item Number** text box, then <click> the **Select** button.

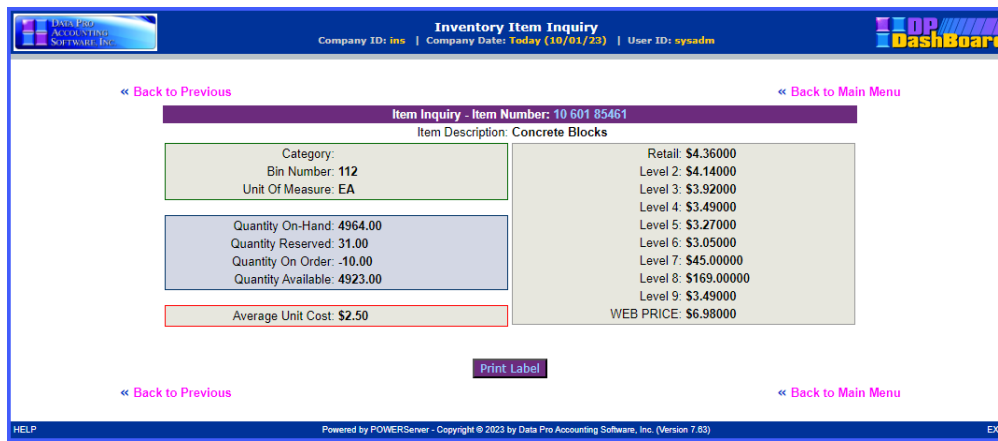
OR

3. Enter a keyword in the Inventory **Item Description** text box, then <click> the **Search** button. The Select an Inventory Item screen displays listing all the available items that are a match with the keyword.

The Search Inventory Items screen displays listing the available inventory items including details such as part number, description, bin number, and category.



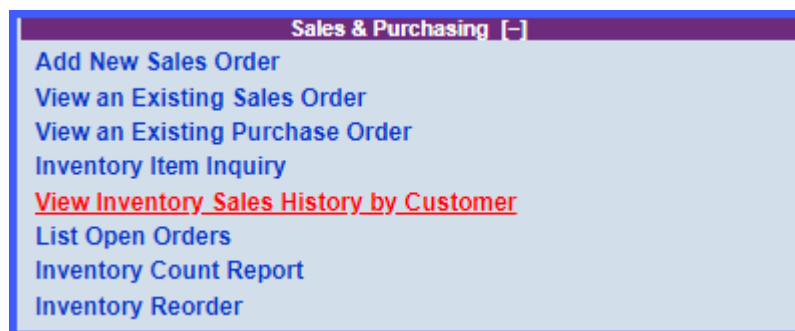
- Choose the desired inventory item from the list and <click> the **Select** button. The Inventory Item Inquiry screen displays details of the selected inventory item such as item number, description, U/M, quantity information, and Cost/Cost Level information. The display of “**Cost Information**” is a security object that can be turned off or on by user or group.



View Inventory Sales History by Customer

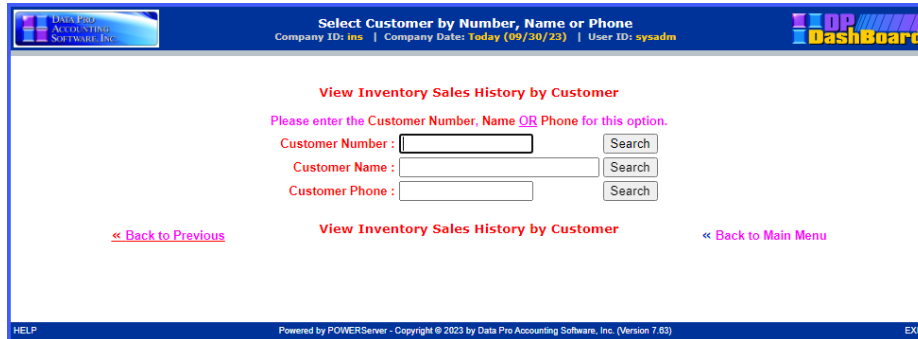
This option allows you to view a customer’s sales history. You can drilldown by invoice # to display a listing of the complete transaction detail. From the selected customer’s sales history, previously ordered items can be selected and a new sales order can be created.

The following screen illustrates where the **Sales and Purchasing>View Inventory Sales History by Customer** option is located on the DP/DashBoard/CRM Menu System screen.



To View a Customer's Historical Sales History:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **View Inventory Sales History by Customer** option from the Sales & Purchasing section. The Select Customer by Number, Name or Phone screen displays.



2. Perform one of the following search options:
 - a. Enter the full or partial assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Search Customer – View Inventory Sales History by Customer screen displays.

NOTE

The customer number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module.

OR

- b. Enter the full or partial name of the customer in the **Customer Name** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Search Customer – View Inventory Sales History by Customer screen displays.

OR

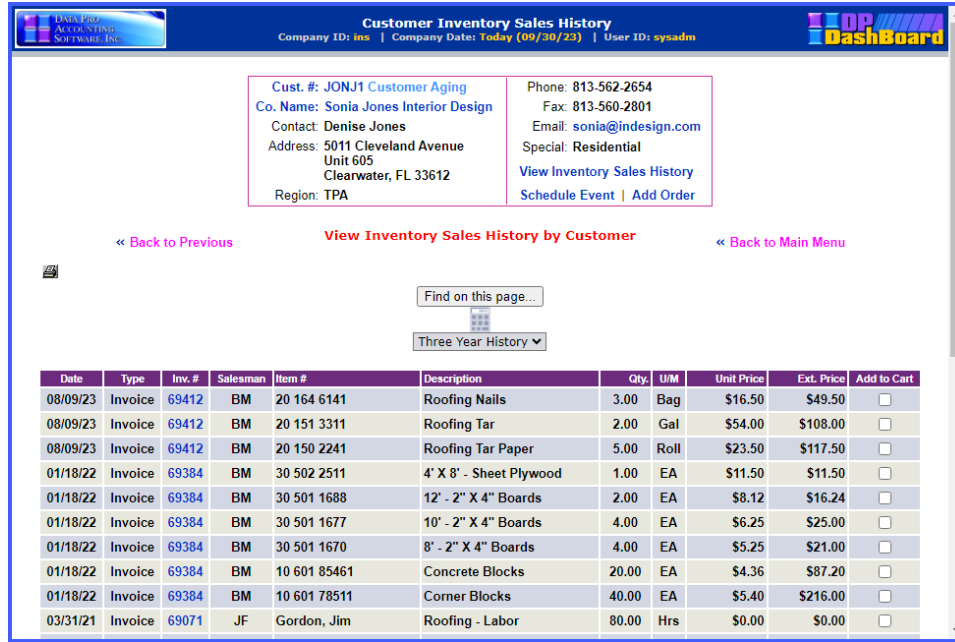
- c. Enter the phone number of the customer in the **Customer Phone** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Search Customer – View Inventory Sales History by Customer screen displays.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER Accounts Receivable** module (i.e. use of dashes versus parenthesis).



3. Select the desired customer from the **Name** column. The Customer Inventory Sales History screen displays details of all the invoices related to that customer.

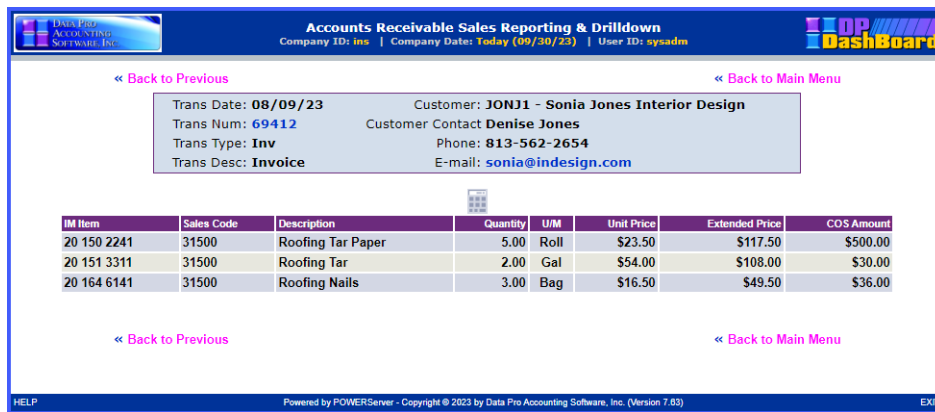


The following table describes the **Customer Inventory Sales History** screen details:

UPPER SECTION	
Cust #	Customer # for the selected customer.
Co. Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Contact	Name of main contact person for the selected company.
Address	Address associated with the selected company.
Region	5-digit alpha/numeric text string defining the region the customer is located.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
Email	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in “special” user defined field stored in each customer’s master record. The title of this field can vary depending on whether the user renamed this field in the Accounts Receivable Master Configuration.
View Inventory Sales History	Clicking this opens the Customer Inventory Sales History screen. This lists the past items ordered and the associated invoice numbers. From this screen these past items can be
Schedule Event	Select this option to schedule an event for this customer in the Event Calendar.
Add Order	This will open the Add Sales Order screen and allow you to add an order for this customer. See the Add New Sales Order section for further instructions.
LOWER SECTION	
Date	Date the sales order is entered into the system.
Type	Description of transaction history (e.g. invoice).

Inv. #	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Salesman	Name of the salesman executing the sales order request.
Item #	Vendor of the inventory item.
Description	Description of the associated inventory items.
Qty.	Lists the quantity that was ordered of the associated inventory.
U/M	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Unit Price	Price of the inventory item.
Ext. Price	Cost of the specified inventory item based on quantity ordered and unit price.
Add to Cart	Select the check boxes of inventory items listed that you want to reorder for that customer. Click the Add to Cart button, and the Add Sales Order screen displays. Once you click Continue in the Add Sales Order screen, the selected items are automatically added to the sales order and the amount due is calculated. See the Add New Sales Order section for further instructions.

<Click> on the desired invoice from the **Invoice #** column to drilldown specific details of the selected invoice. The Accounts Receivable Sales Reporting & Drilldown screen displays with all the inventory items listed for the selected customer's specified invoice.



List Open Orders

This option allows you to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail. From the selected customer's sales history, previously ordered items can be selected and a new sales order can be created.

The following screen illustrates where the **Sales and Purchasing>List Open Orders** option is located on the **DP/DashBoard/CRM Menu System** screen.



To List Open Orders:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **List Open Orders** option from the Sales & Purchasing section. The Select Order Type screen displays screen displays. There is a pull-down option that allows you to choose from the following three options:



2. Based on which of the three choices you pick, only those order types will be included in the following listing.

08/14/23	Normal	House	Allens Hardware Shops Inc.	2nd Name Ship Addr 1 Ship City, FL 33701	CustPO	10563
08/14/23	Normal	House	Allens Hardware Shops Inc.	2nd Name Ship Addr 1 Ship City, FL 33701	CustPO	10564
08/14/23	Normal	JF	Allens Hardware Shops Inc.	Test Name Addr1 City, State 33333		10565
08/14/23	Normal	JF	Allens Hardware Shops Inc.	Test Name Addr1 City, State 33333		10566
08/14/23	Normal	JF	Allens Hardware Shops Inc.	Test Name Addr1 City, State 33333		10567
08/14/23	Normal	JF	Allens Hardware Shops Inc.	Test Name Addr1 City, State 33333		10568
09/30/23	Normal	JF	Allens Hardware Shops Inc.	Allen's Hardware Shops Inc. 400 Palm St. Tampa, FL 33610	75941	10569

« Back to Previous

« Back to Main Menu

HELP Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.63) EXIT

Click on the order number you want to view on the right side of the listing. The order detail will appear on the next screen.

View Sales Order Detail
 Company ID: **Ins** | Company Date: **Today (10/01/23)** | User ID: **sysadm**

Sales Order #: 10569

Profile for Customer #: ALLE1

Customer Name: Allens Hardware Shops Inc.	Order Date: 09/30/23
Price Level: 2	Discount %: 5.000
Salesman: JF	Description: Invoice
Customer PO: 75941	Status: FedEx
Freight Amount: \$22.14	Terms: Net 30
Order Type: Normal	

Billing Address	Shipping Address
Allens Hardware Shops Inc. 400 E. Kennedy Blvd. Orlando, FL 33421	Allen's Hardware Shops Inc. 400 Palm St. Tampa, FL 33610

Code	Part #	Description	U/M	Quantity	Price	Disc %	Totals
31200	60 7 131	Electric Box - Fuses	EA	4.00	\$3.56	0.000	\$14.24
31200	40 801 6134	Electrical Outlet Box	EA	1.00	\$131.79	0.000	\$131.79
31200	11 A POLE	Electric Box Pole	EA	1.00	\$191.47	0.000	\$191.47
Total:							\$337.50
Discount:							\$16.88
Tax:							\$1.66
Freight:							\$22.14
Order Total:							\$344.42

[Printable Sales Order](#) | [Printable Packing List](#) | [Create New Order from this Sales Order](#)
[Post Deposit](#) | [Modify This Order](#)
[Schedule Calendar Event](#)

Sales Order #: 10569

The order or proposal detail is displayed. You have several options that you can perform from this point which include the printing of the Sales Order, printing of a Packing List, creation of a New Order from this Sales Order, posting of a Deposit to this order, modifying this order or scheduling a Calendar Event. You can go back to the previous screen or back to the Main Menu.

An image of the **Printable Packing List** is shown below:

DATA PRO ACCOUNTING SOFTWARE, INC.
 Infinity POWER Sample Company, Inc.
 111 2nd Avenue NE
 Suite 360
 St Petersburg FL 33701 USA
 Phone: 727-803-1500

B Allens Hardware Shops Inc.
T 400 E. Kennedy Blvd.
L Orlando, FL 33421
L
T Tony Rizzo 407-434-1288
O

PACKING LIST

DATE	SALES ORDER NO.
09/30/23	10569
ACCOUNT NO.	SALESMAN NO.
ALLE1	JF

S Allen's Hardware Shops Inc.
H 400 Palm St.
I Tampa, FL 33610
P
T jbrock@dpro.com
O

DESCRIPTION	ORDER DATE	CUSTOMER P.O. NO.	SALES ORDER NO.	SHIPPING INSTRUCTIONS
Invoice	09/30/23	73841	10569	UPS Ground

QTY ORDERED	REMAINING	QTY SHIPPED	PART #	U / M	DESCRIPTION
4.00	4.00	0.00	60 7 131	EA	Electric Box - Fuses
1.00	1.00	0.00	40 801 6134	EA	Electrical Outlet Box
1.00	1.00	0.00	11 A POLE	EA	Electric Box Pole

Infinity POWER Sample Company, Inc.
 111 2nd Avenue NE
 Suite 360
 St Petersburg FL 33701 USA

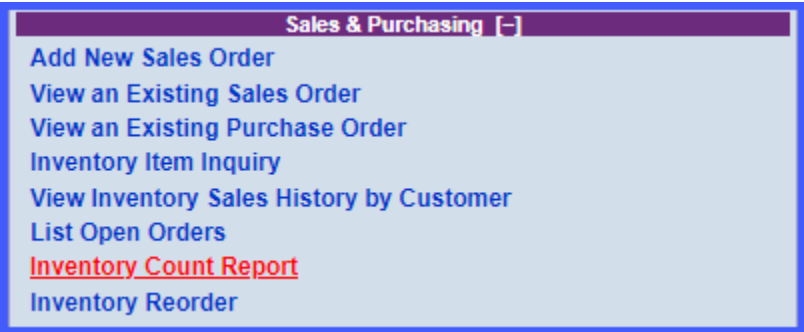
TOTAL # OF PKGS

TOTAL WEIGHT

Packed By _____

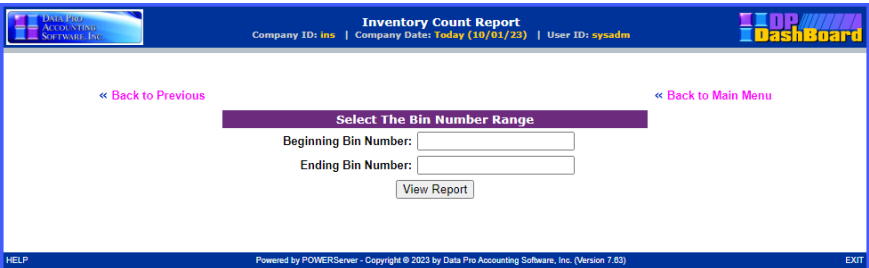
Inventory Count Report

This option allows you to view the **Inventory Count Report**. The following screen illustrates where the **Sales and Purchasing>Inventory Count Report** option is located on the **DP/DashBoard/CRM Menu System** screen.



To View Inventory Count Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Inventory Count Report** option from the Sales & Purchasing section. The **Select The Bin Number Range** screen displays.



This option shows the current items within the define range of inventory items specified by the Beginning and Ending Bin Number range. A listing will be displayed that includes the following fields: Bin Number, Item Number, Description, Unit of Measure, Quantity On-Hand, Physical Count and Counted (Y/N).

The screenshot displays the "Inventory Count Report" table for the bin number range 108 - 282. The table includes the following data:

Bin Number	Item Number	Description	U/M	Quantity On-Hand	Physical Count	Counted
108	10 601 78511	Corner Blocks *Up to 4 lines of Description *On an Inventory Item. Lines *with an asterisk don't print	EA	61.00	90.00	Y
112	10 601 85461	Concrete Blocks	EA	4,964.00	5,000.00	Y
117	10 602 16522	Cement - 100 lb. Bag	Bag	50.00	10.00	Y
242	11 A POLE	Electric Box Pole	EA	24.00	15.00	Y
247	20 150 2241	Roofing Tar Paper *Order by the dozen rolls.	Roll	5.00	0.00	N
252	20 151 3311	Roofing Tar	Gal	3.00	0.00	N
257	20 164 6141	Roofing Nails	Bag	12.00	0.00	N
262	30 140 2200	Roofing Shingles	Box	6.00	0.00	N
267	30 501 1670	8" - 2" X 4" Boards	EA	0.00	0.00	N
272	30 501 1677	10" - 2" X 4" Boards	EA	0.00	0.00	N
277	30 501 1688	12" - 2" X 4" Boards	EA	0.00	0.00	N
282	30 502 2511	4' X 8' - Sheet Plywood	EA	0.00	0.00	N

A "Clear Physical Counts" button is located at the bottom of the table.

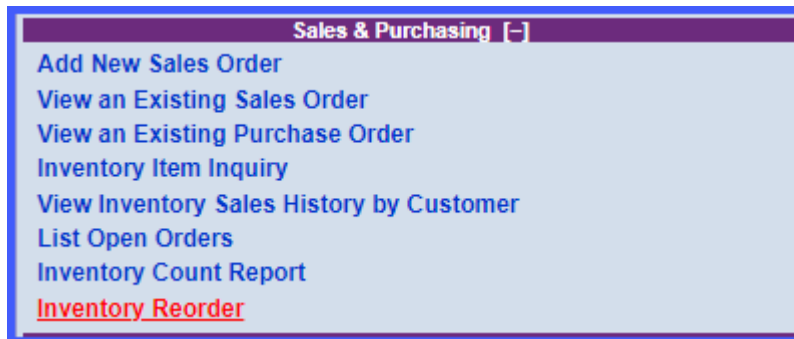
This option is used along with the **DP/Scan** or **DP/ScanPC** products when performing physical counts. By selecting a bin number range, you can view the current on-hand quantities and the physical count quantities and whether or not they have already been counted.

If you are ready to perform another count for the bin number range, then you can click on the “Clear Physical Counts” button to set all of the physical counts to zero and flag them as counted. Then, use the DP/Scan or DP/ScanPC product to actually enter each item’s physical count. The purpose of setting the counted flag to Y(es) is so that if a particular item is completely gone, then the item’s count does not have to be scanned or entered as zero.

Once the counts have been entered, then go to the **Infinity POWER Inventory Management** module. The “Print Inventory Shrinkage” report should be run. Then, the option “Update Book Value After Count” should be run. The COPY TABLE link will copy the entire table to your clipboard so that it can be pasted into Excel.

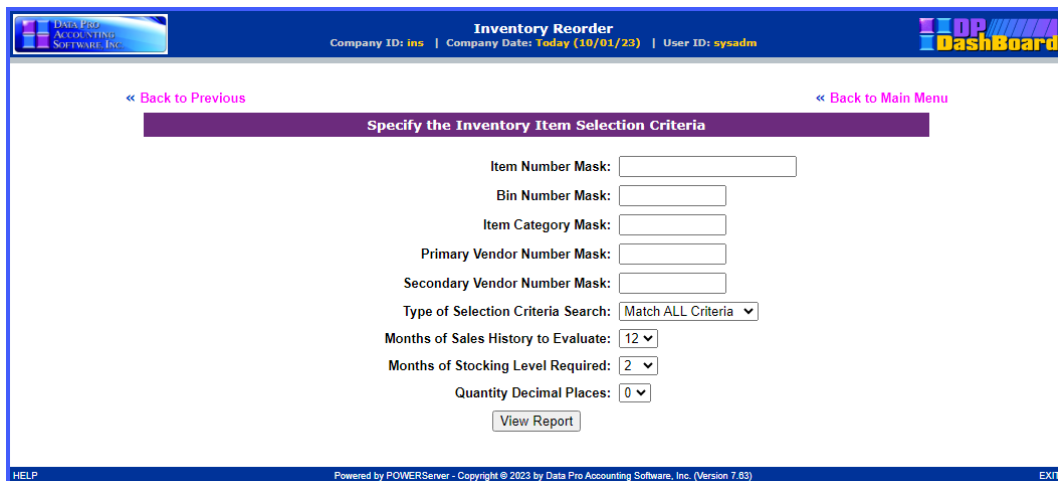
Inventory Reorder

This option allows you to view the **Inventory Reorder Report**. The following screen illustrates where the **Sales and Purchasing>Inventory Reorder** option is located on the **DP/DashBoard/CRM Menu System** screen.



To View the Inventory Reorder Report:

1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Inventory Reorder** option from the **Sales & Purchasing** section. The **Specify the Inventory Item Selection Criteria** screen displays.



This option allows you to create the criteria for generating Purchase Orders for re-order inventory for stock. It allows you to take many criteria into account to assist you in making management decision on what you should re-order based on historical data as to assist you in projecting your upcoming sales needs as part of your forecasts.

This trend analysis can be invaluable to take into account seasonality of your business cycles so you can either preserve you cash flow or to properly prepare for your upcoming peak sales cycles. The following fields are prompted to you to be used in the calculation. This includes the use of “Masking,” which means you are using a consistent portion of that field to match a specific criterion.

For instance, in the following screen shot, you will notice that the Bin Number Mask shows a “2” in the first position. That means that only those inventory items that have a “2” in the first position of the Bin Number field will be used in the calculation of this report.

Item Number Mask Bin Number Mask Item Category Mask
Primary Vendor Number Mask Secondary Vendor Mask

The prompt for **Type of Selection Criteria Search** has two choices:

Type of Selection Criteria Search: ▼

Months of Sales History to Evaluate: ▼

Months of Stocking Level Required: ▼

Quantity Decimal Places: ▼

This prompt is looking to be very specific that either **ALL** criteria must match or just **ANY** criteria can match for the information to show up on the following report. That choice is yours.

Months of Sales History to Evaluate is a number between **1** to **12** or one year on a rolling year basis.

Month of Stocking Level Required is a number between **1** to **12** or one year to allow you to project your needs for up to one year going forward.

Quantity Decimal Places is a number between **1** to **5** places, which is the maximum allowed by the Inventory Management software module.

Once all of your criteria have been entered, click the “**View Report**” to see your results. This option can be run over and over until you find the results you seek.

Item #	Description	UOM	Last Cost	Qty Sold	Mthly Avrg	Needed	Reserved	On Order	On Hand	Qty Adj	Sugg Order	Order Qty	Item #	Max Qty	Min Qty
11 A POLE	Electric Box Pole	EA	\$55.00000	0	0	0	1	0	24	-263	240	240	11 A POLE	25	5
20 150 2241	Roofing Tar Paper	Roll	\$100.00000	2,005	167	334	0	425	5	-1,058	962	962	20 150 2241	150	65
20 151 3311	Roofing Tar	Gal	\$15.00000	1,003	84	167	0	20	3	-.67	211	211	20 151 3311	550	200
20 164 6141	Roofing Nails	Bag	\$12.00000	10,003	834	1,667	0	40	12	-8,650	10,265	10265	20 164 6141	65	25
30 140 2200	Roofing Shingles	Box	\$25.00000	5,000	417	833	0	120	6	-3,319	4,026	4026	30 140 2200	150	65
30 501 1670	8' - 2" X 4" Boards	EA	\$0.00000	0	0	0	0	101	0	-.4	150	150	30 501 1670	450	150
30 501 1677	10' - 2" X 4" Boards	EA	\$0.00000	0	0	0	0	200	0	-.4	150	150	30 501 1677	450	150
30 501 1688	12' - 2" X 4" Boards	EA	\$0.00000	0	0	0	0	60	0	-.2	100	100	30 501 1688	325	100
30 502 2511	4' X 8' - Sheet Plywood	EA	\$0.00000	0	0	0	0	48	0	-.1	40	40	30 502 2511	280	40
40 770 611	100' - Heavy Gauge Copper Wire	Feet	\$55.00000	0	0	0	0	0	0	-.1	400	400	40 770 611	800	400
40 770 614	50' - Heavy Gauge Copper Wire	Feet	\$0.00000	0	0	0	0	0	150	0	150	150	40 770 614	300	150
40 801 6134	Electrical Outlet Box	EA	\$0.00000	0	0	0	1	105	0	-.2	2	2	40 801 6134	8	2
50 221 165	Lightweight Sawblades	EA	\$0.00000	0	0	0	0	10	2	0	12	12	50 221 165	24	12
60 6 107	2" Wire Clamp	EA	\$20.00000	0	0	0	0	0	20	-.1	10	10	60 6 107	150	10
Total Quantity												16718			
Total Cost												358595.00			

Select the Vendor to place the Purchase Order of the above items:
 Vendor Number: ▼

Notice in the Order Qty column circled in red on the following screen, the system has used criteria to produce a suggested Order Qty. That doesn't mean that you are **“required”** to place an order for those amounts. This is a **“suggested order amount.”**

Item #	Description	UIM	Last Cost	Qty Sold	Mthly Avg	Needed	Reserved	On Order	On Hand	Qty Adj	Sugg Order	Order Qty	Item #	Max Qty	Min Qty
11 A POLE	Electric Box Pole	EA	\$55.00000	0	0	0	1	0	24	-263	240	240	11 A POLE	25	5
20 150 2241	Roofing Tar Paper	Roll	\$100.00000	2,005	167	334	0	425	5	-1,058	962	962	20 150 2241	150	65
20 151 3311	Roofing Tar	Gal	\$15.00000	1,003	84	167	0	20	3	-67	211	211	20 151 3311	550	200
20 164 6141	Roofing Nails	Bag	\$12.00000	10,003	834	1,667	0	40	12	-8,650	10,265	10,265	20 164 6141	65	25

The field is left open for editing since you may have other information that the system is not aware of, such as pending orders, sales, deletions of item numbers, etc. Therefore, you can then edit these fields and input your own amounts as shown.

Item #	Description	UIM	Last Cost	Qty Sold	Mthly Avg	Needed	Reserved	On Order	On Hand	Qty Adj	Sugg Order	Order Qty	Item #	Max Qty	Min Qty
11 A POLE	Electric Box Pole	EA	\$55.00000	0	0	0	1	0	24	-263	240	150	11 A POLE	25	5
20 150 2241	Roofing Tar Paper	Roll	\$100.00000	2,005	167	334	0	425	5	-1,058	962	1100	20 150 2241	150	65
20 151 3311	Roofing Tar	Gal	\$15.00000	1,003	84	167	0	20	3	-67	211	250	20 151 3311	550	200
20 164 6141	Roofing Nails	Bag	\$12.00000	10,003	834	1,667	0	40	12	-8,650	10,265	8800	20 164 6141	65	25

At the bottom of the report is a Total Cost field for all of the items selected for this report. Likewise, there is an option for an integration to the **Infinity POWER Purchase Order Entry** module whereby you can choose a vendor to place an order for the selected items with a vendor from a pull-down list.

Total Cost 358595.00

Select the Vendor to place the Purchase Order of the above items:

Vendor Number: --- Select a Vendor ---

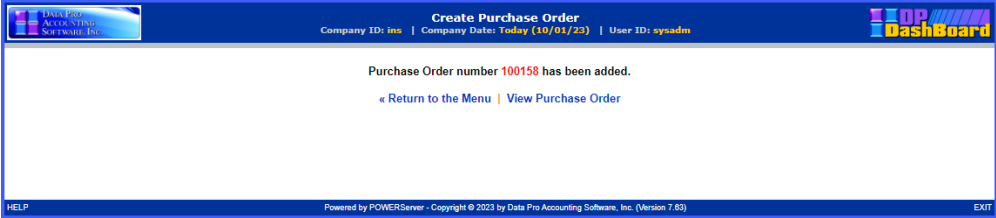
Place Order

You may use the scroll bar to go through the list of available vendors to select the vendor to assign to this purchase order. Click on that Vendor and then click on the **“Place Order”** button to automatically generate a purchase order from the results of this feature. As you can see on the following screen, a new Purchase Order number has been added.

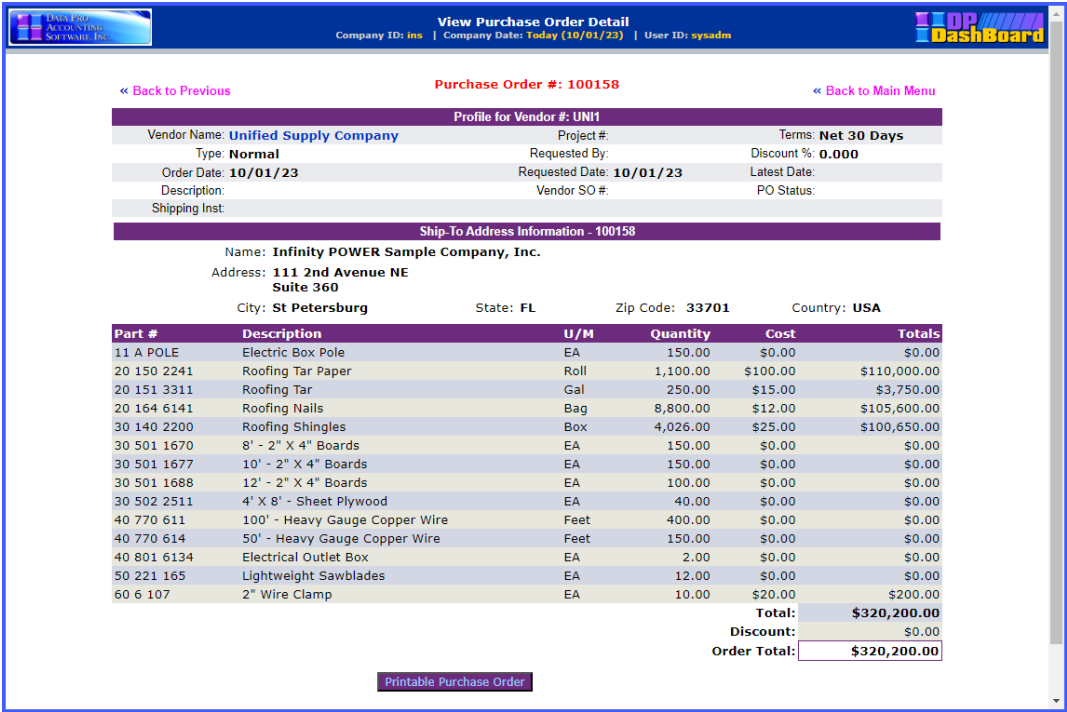
Select the Vendor to place the Purchase Order of the above items:

Vendor Number: --- Select a Vendor ---

Place Order



You can click on the “View Purchase Order” to review the Purchase Order. You may then decide you still want or need to make changes to the Purchase Order. Then, you would go to the **Infinity POWER Purchase Order Entry** module to make those edits.



Click on the “Printable Purchase Order” button to generate a PDF of the Purchase Order that can be printed, e-mailed or e-faxed to a vendor.



Infinity POWER Sample Company, Inc.
 111 2nd Avenue NE
 Suite 360
 St Petersburg FL 33701 USA
 Phone: 727-803-1500

PURCHASE ORDER

DATE	PURCHASE ORDER NO.
04/30/21	100118
ACCOUNT NO.	LAST DATE
BOW1	

V
E
N
D
O
Bower's Roofing Supplies
 1673 N. Nebraska Avenue
 Tampa, FL 33613

S
H
I
P
T
O
Infinity POWER Sample Company Inc
 5439 Beaumont Center Blvd
 Suite 1050
 Tampa, FL 33634

DESCRIPTION		NEED BY	LAST DATE	VENDOR SO NO.	SHIPPING INSTRUCTIONS	
Stock Order		04/30/21		78666	Best Way	
QTY	U / M	PART #	DESCRIPTION	UNIT PRICE	EXTENSION	
200.00	Roll	20 150 2241	Roofing Tar Paper	\$15.83	\$3,166.00	
20.00	Gal	20 151 3311	Roofing Tar	\$33.75	\$675.00	
40.00	Bag	20 164 6141	Roofing Nails	\$10.31	\$412.40	
120.00	Box	30 140 2200	Roofing Shingles	\$46.28	\$5,553.60	
BILL TO:				TERMS: Net 30 Days	TOTAL AMOUNT	\$9,807.00
Infinity POWER Sample Company, Inc. 111 2nd Avenue NE Suite 360 St Petersburg FL 33701 USA REQUESTED: Joe Stanza AUTHORIZED: _____				DISCOUNT	\$0.00	
				TAX	\$0.00	
				SUBTOTAL	\$9,807.00	
				DEPOSIT	\$0.00	
				ORDER AMOUNT	\$9,807.00	

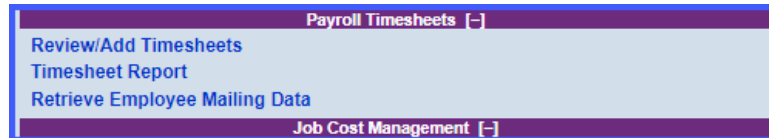
PAYROLL TIMESHEETS

The **Payroll Timesheets** options provide internal users within the firm with the ability to key in their daily timesheets 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 Administrator** and the employee number set up in the **DP/DashBoard/CRM Set up Users** option, an employee can enter his or her own time.

Also, depending on security rights set up in **Advanced Security Administrator**, an employee will be only allowed to view his or her employee number. This option is also integrated to the **Job Cost Main Module** so 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 Payroll, until the payroll manager or employee updates time sheets to the payroll module through the normal **Infinity POWER Time Sheet Entry** option “**Post Time Sheets.**”

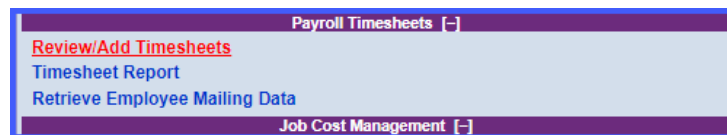
Options include **Review/Add Timesheets** and **Timesheet Report**. These features are accessible in the **Payroll Timesheets** section of the **DP/DashBoard/CRM Menu System** screen.



Review/Add Timesheets

This mode allows you to add new employee time sheets and review those already entered into the system. This information includes the employee number and name, day/reference number, entry type, cost code, and pay information. These entries may be allocated by employee, department, and project.

The following screen illustrates where the **Payroll Timesheets>Review/Add Timesheets** option is located on the **DP/DashBoard/CRM Menu System** screen.

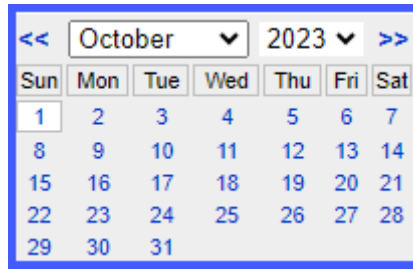


To Review/Add a Timesheet:

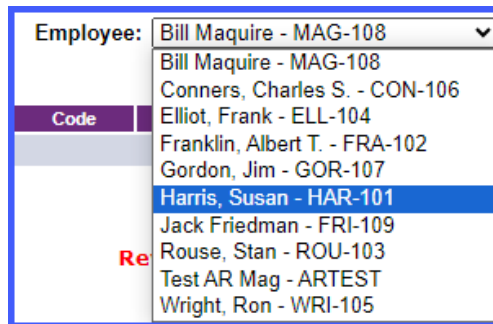
1. From the Payroll Timesheets section of the **DP/DashBoard/CRM Main Menu**, <click> the **Review/Add Timesheets** option. The Review/Add Timesheets screen displays.



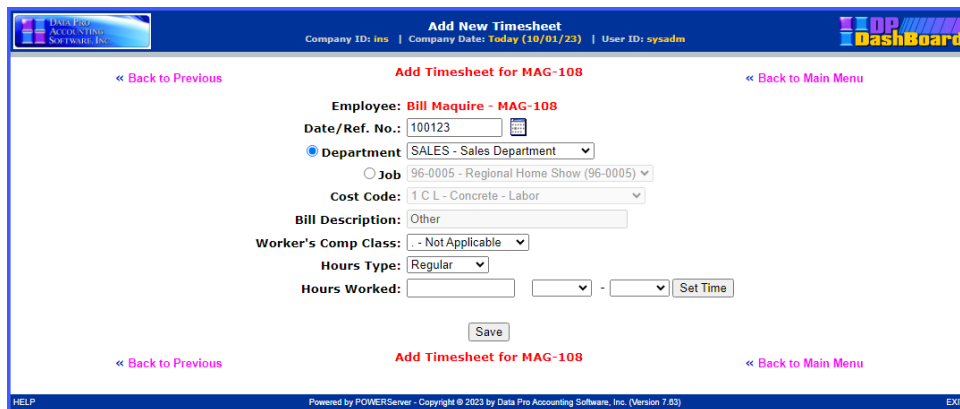
2. Select the desired **Beginning Date** and **Ending Date** from the two date range boxes. You can click on the calendar icon next to each one to display a calendar to pick the actual date as shown on the following image:



3. Select the desired employee name from the **Employee** pull-down menu.



4. <Click> the **Add New Timesheet** option. The Add New Timesheet window displays.



The following table describes the Add Timesheet data items.

Employee	The name of the employee/id for which the timesheet is being added.
Date/Ref Number	Date the new timecard is added.
Department	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu, if a job is allocated.
Cost Code Number	This data item will only be used if you selected “ Job ” as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted. This is a pull-down list of valid codes only.
Bill Description	If the option to allow “ <i>Entry of JC/TB Transaction Description</i> ” is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.
Worker’s Comp Class	If the option to “ <i>Allow Workers’ Comp. Classes</i> ” is turned off in the Payroll Master Configuration, this data item will not be displayed. This item specifies which Workers’ Compensation class the hours and dollars for this entry should be accumulated under. For hourly employees, it may also determine the default pay rate for this entry. This option can be used to define multiple pay rates, per employee, for specific types of work. The Workers’ Comp. classes are defined in the payroll module. Please refer to the payroll manual for a complete explanation of their use.
Hours Type	This data item contains the hour’s type for entry. The hour’s type determines the rate of pay and the description for a particular class of hourly work. These types are defined in your Payroll module in the Master Configuration section under “ <i>Time Categories.</i> ” These would include Normal time, Overtime, Piecework, etc.
Hours Worked	Total hours worked for the specified employee. Calculated by clicking the Set Time button.
From/To Time	To the right of Hours Worked, there are two pull-down options to choose the starting time of work and the ending time. If you have selected the option to enter hours as beginning and ending times, specify a time range.
Set Time	Click this button to calculate the number of hours worked based on the time range selected. This calculation will be posted automatically into the “ Hours Worked ” field when you click the “ Set Time ” button.

5. Enter the required information in the appropriate fields and make the desired selections from the pull-down menus.
6. <Click> the **Save** button to save your selections and enter the time sheet into the system.

- When you <Click> the **Save** button to save your selections, you will be returned to the “Review/Add Timesheets” screen where you can either make edits and/or “Add” more timesheets.

Date/Reference	Dept./Job	Code	Bill Description	WC Class	Type	Time	Hours
100123.001	SALES - Sales Department			General	Regular	08:15A-05:15P	9.00
Sunday, October 1, 2023 Regular:							9.00
Sunday, October 1, 2023 Total:							9.00
Total Regular:							9.00
Total Hours:							9.00

Timesheet Report

This option provides a complete listing of Time Sheets not yet posted in the accounting system. Prior to updating time sheets, an employee can run the **Timesheet Report** for their employee number only with totals by date and a grand total for the pay period. A user with administrator rights can add/change any of the time sheets posted. The administrator can also run the report for all employees.

If you want to view a full report, a user with administrator rights will need to change the report settings in the **Time Sheet Entry** module in the **Infinity POWER** application. The report will then automatically be printed using the information you have set up in the Master Configuration.



To Display a Time Sheet Report

1. From the Payroll Timesheets section of the **DP/DashBoard/CRM Main Menu**, <click> the **Timesheet Report** option. The **Timesheet Report** screen displays listing all entered timesheets for the specified range of employees and date range.

The screenshot shows the 'Timesheet Report' interface. At the top, it displays 'Company ID: ins | Company Date: Today (10/01/23) | User ID: sysadm'. Below this are navigation links: '<< Back to Previous' and '<< Back to Main Menu'. The main area contains a table with the following columns: Date/Reference, Dept/Job, Code, Bill Description, WC Class, Type, Time, and Hours. The data is grouped by employee:

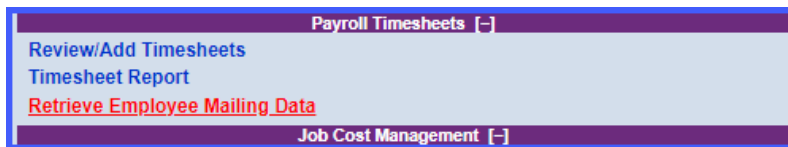
Date/Reference	Dept/Job	Code	Bill Description	WC Class	Type	Time	Hours
Bill Maquire - MAG-108							
100123-001	SALES - Sales Department			General	Regular	08:15A-05:15P	9.00
						Sunday, October 1, 2023 Regular:	9.00
						Sunday, October 1, 2023 Total:	9.00
						Total Regular:	9.00
						Total Hours:	9.00
Conners, Charles S. - CON-106							
1-900	5203	1 R M - Roofing - Materials		Framing Labor	Regular	-	80.00
101520-001	GEN. LABOR - General Labor			Framing Labor	Regular	01:00P-01:00P	0.00
101520-002	GEN. LABOR - General Labor			Framing Labor	Regular	01:00P-01:00P	0.00
101520-003	SALES - Sales Department			Framing Labor	Regular	01:00P-	0.00
						Thursday, October 15, 2020 Total:	0.00
123103	SALES - Sales Department			Not Applicable	Regular	-	2.00
						Total Regular:	82.00
						Total Hours:	82.00
Harris, Susan - HAR-101							
100123-001	ADMIN - Administration			General	Regular	-	40.00
						Sunday, October 1, 2023 Regular:	40.00
						Sunday, October 1, 2023 Total:	40.00
						Total Regular:	40.00
						Total Hours:	40.00

At the bottom, there are navigation links: '<< Back to Previous', 'Timesheet Report', and '<< Back to Main Menu'. The footer includes 'HELP', 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.63)', and 'EXIT'.

Retrieve Employee Mailing Data

This option allows you to extract customers from the **DP/DashBoard/CRM** system for the purposes of generating mailing labels and mail merges.

The following screen illustrates where the **Payroll Timesheets>Retrieve Employee Customer Mailing Data** option is located on the **DP/DashBoard/CRM Menu System** screen.



To Retrieve Employee Mailing Data:

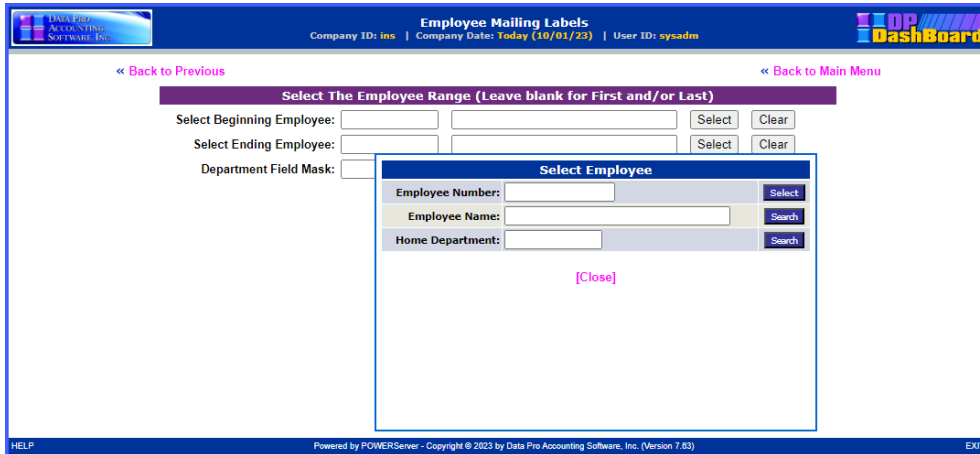
1. In the center of the **DP/DashBoard/CRM Menu System** screen, select the **Retrieve Employee Mailing Data** option from the Payroll Timesheets section. The following screen displays.

The screenshot shows the 'Employee Mailing Labels' screen. At the top, it displays 'Company ID: ins | Company Date: Today (10/01/23) | User ID: sysadm'. Below this are navigation links: '<< Back to Previous' and '<< Back to Main Menu'. The main area contains a form titled 'Select The Employee Range (Leave blank for First and/or Last)'. The form has the following fields:

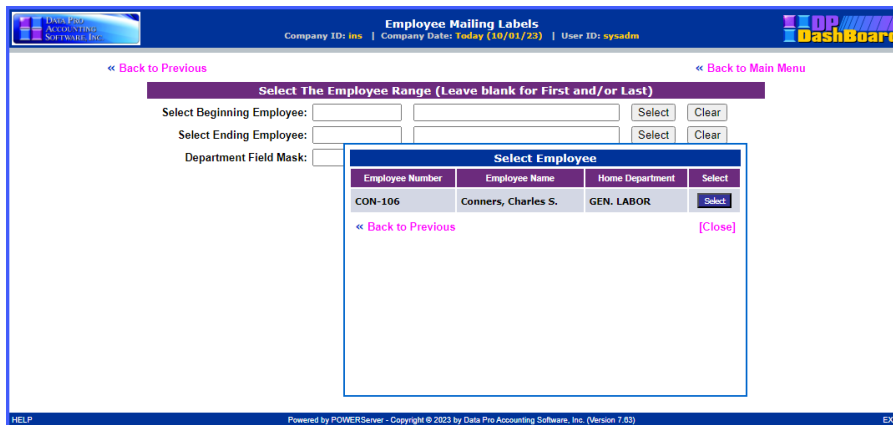
- Select Beginning Employee: [] [] [Select] [Clear]
- Select Ending Employee: [] [] [Select] [Clear]
- Department Field Mask: []

Below the form is a button labeled 'Create Employee Mailing Data'. The footer includes 'HELP', 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.63)', and 'EXIT'.

- The screen is prompting for a Beginning and Ending Employee Number. Click on the “Select” button on the right side of the screen to pop up a screen that will prompt you for one of three fields in which you may enter your beginning customer number as shown below:



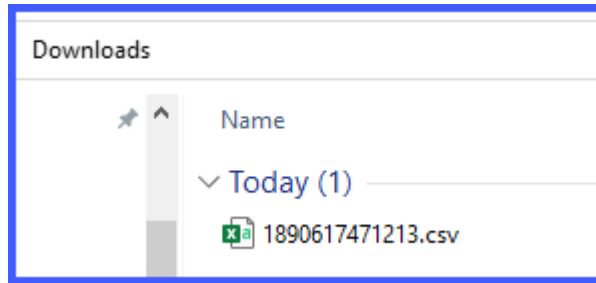
- If there is a “near match,” the following screen will appear:



- The remaining field is a “Mask” option, which means you have the ability to specify specific choices of the “Department Field Mask.” This provides you the extraction capabilities to target your mailings to specific employees by Departments.
- Click on the “Create Employee Mail Data” button to generate the following screen:



- Notice, highlighted in red on the prior screen that you can now **“Download Customer List for Mailing Labels”** or **“Download PDF Mailing Labels.”** If you select the first option, an Excel **“csv”** file will be generated for use with mail merges.



- It will have the following file layout:

	A	B	C	D	E	F	G	H
1	NAME	STREET	STREET2	CITY	STATE	ZIP		
2	Conners, Charles S.	5422 N. Sheldon Road	Apt. 233	Tampa	FL	33635	GEN. LABOR	
3	Elliot, Frank	7113 Henderson Blvd.	#208	Tampa	FL	33602	GEN. LABOR	
4	Franklin, Albert T.	9833 N. Hanley Road		Tampa	FL	33637	GEN. LABOR	
5	Jack Friedman	15519 Lake Shore Villa		Tampa	FL	33636	SALES	
6	Gordon, Jim	4500 Tampa St.		Tampa	FL	33612	GEN. LABOR	
7	Harris, Susan	445 S. Ford St.		St. Petersburg	FL	33517	ADMIN	
8	Bill Maquire	14523 Halfway Lane		Tampa	FL	33697	SALES	
9	Rouse, Stan	1422 S. Addison Drive	Bldg. #2	Tampa	FL	33601	MANAGEMENT	
10	Wright, Ron	1212 W. Cypress Blvd.		Tampa	FL	33623	GEN. LABOR	
11								

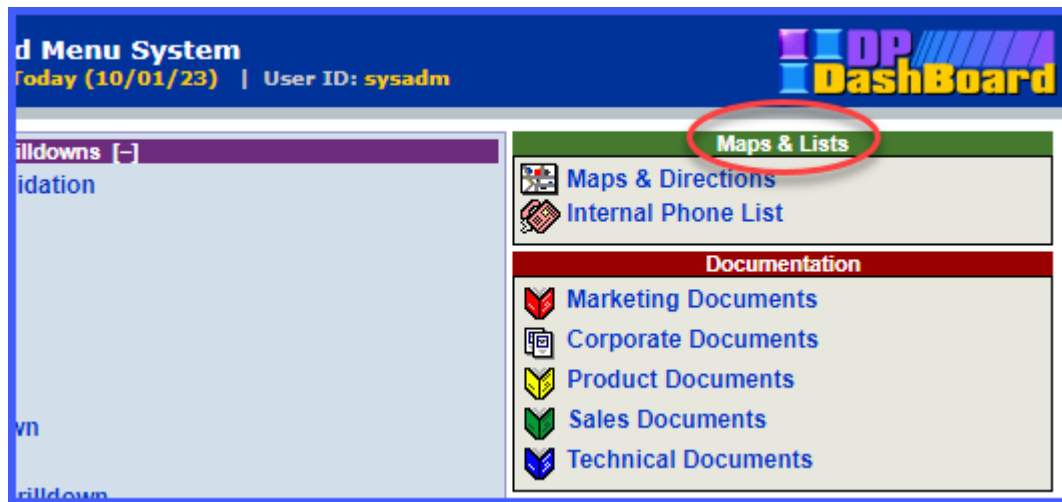
- If you select the second option, the system will generate a **“PDF”** file that is specifically designed to print on **Avery 5160 Mailing Labels** on a LaserJet printer.

Conners, Charles S. 5422 N. Sheldon Road Apt. 233 Tampa, FL 33635	Elliot, Frank 7113 Henderson Blvd. #208 Tampa, FL 33602	Franklin, Albert T. 9833 N. Hanley Road Tampa, FL 33637
Jack Friedman 15519 Lake Shore Villa Tampa, FL 33636	Gordon, Jim 4500 Tampa St. Tampa, FL 33612	Harris, Susan 445 S. Ford St. St. Petersburg, FL 33517
Bill Maquire 14523 Halfway Lane Tampa, FL 33697	Rouse, Stan 1422 S. Addison Drive Bldg. #2 Tampa, FL 33601	Wright, Ron 1212 W. Cypress Blvd. Tampa, FL 33623

MAPS & LISTS

The Maps & Lists section of the **DP/DashBoard/CRM Menu System** screen consists of the **Maps & Directions** and **Internal Phone List** options. The benefits of centralizing information such as corporate maps, directions, and phone lists are extremely valuable. Common information such as this can now be accessed quickly and accurately. Both of these options are user-defined, meaning you can change the main image icons, titles, and other attributes associated with these options.

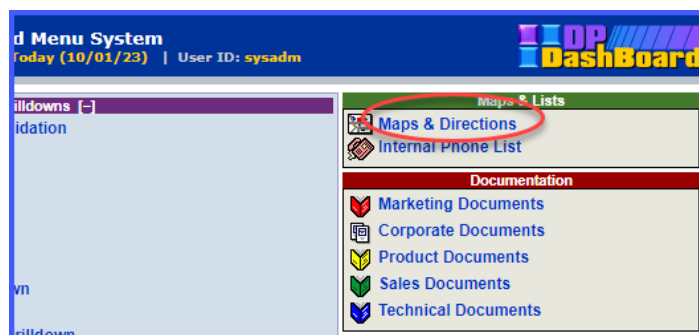
The following screen illustrates the section in the upper right corner of the screen where these options are displayed.



Maps & Directions

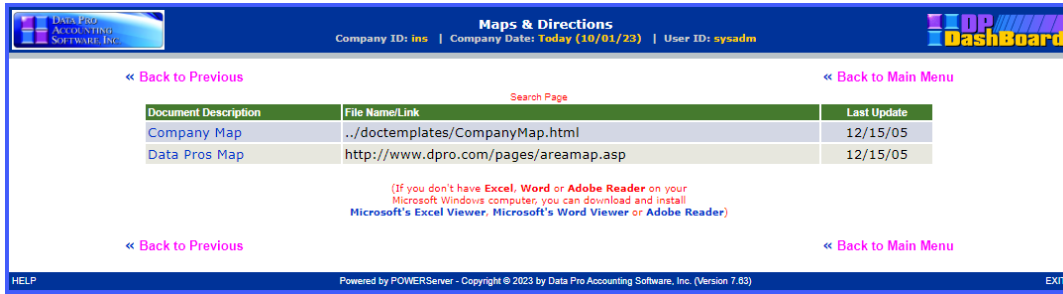
The **Maps & Directions** section is where you would keep company maps and directions so that your employees can quickly download and/or email them directly to a client that would like to visit your facility. This option is user-defined, which means you can change the title and main menu image icon. See the **DP/DashBoard/CRM Admin>DP/DashBoard/CRM Config>Setup Maps & Directions** section of this manual for detailed steps on these configuration options.

This option is accessible in the Maps & Lists section of the **DP/DashBoard/CRM Menu System** screen.



To Access the Maps & Directions Screen:

1. On the right side of the **DP/DashBoard/CRM Menu System** screen, select the **Maps & Directions** option from the Maps & Lists section. The Maps & Directions screen displays.



To Open a Maps & Directions Document or Link:

1. From the Maps & Directions screen, <click> the desired document or link to open from the **Document Description** column. The document/link opens in the appropriate associated program.

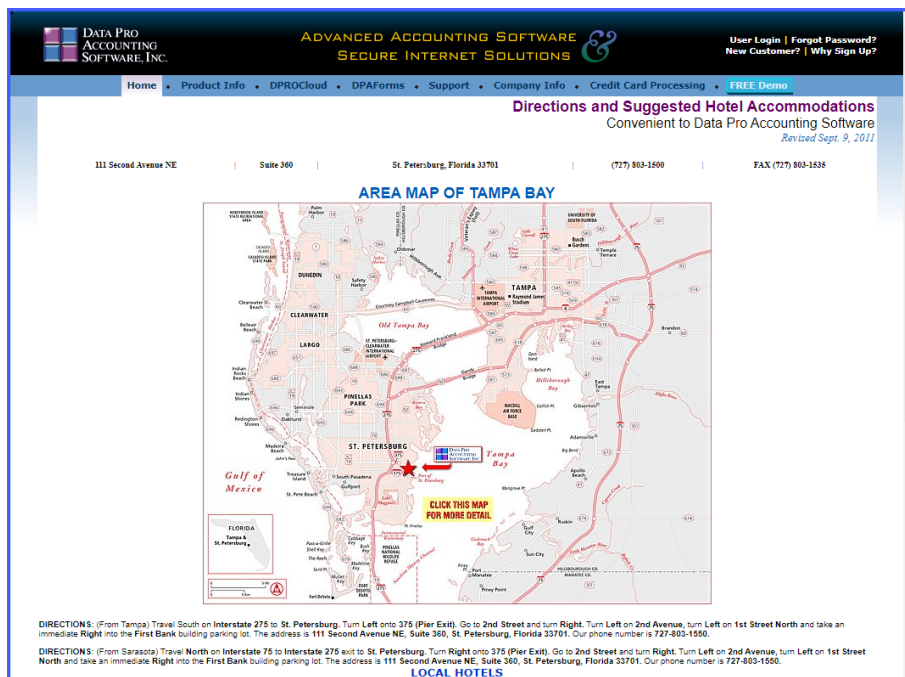
NOTE

You must have the associated application loaded on your system in order for the document to open (i.e. if you are trying to open an *.xls* file, you need to have Microsoft Excel loaded on your system.)

When you click on Company Map, the following page will display.



When you click on Company Map link, the following page will display. Having a link for your own company can be very help for your staff and your clients to find your location and other offices.



Internal Phone List

It is always important to have a current company phone list. The internal phone list is automatically updated when new users are added or removed in the **DP/DashBoard/CRM/Admin.>DP/DashBoard/CRM Config>Setup/Configure Users** option. Employee information such as name, title, department, location, phone numbers, and e-mail addresses are provided.

If an e-mail address is provided, you can send an employee an email directly from this screen. The company address, contact information, and image are all user-defined and are setup in the **DP/DashBoard/CRM Admin.>DP/DashBoard/CRM Config>Setup Company Logo & Phone Numbers** section. This option is accessible in the Maps & Lists section of the **DP/DashBoard/CRM Menu System** screen.



To Access the Internal Phone List:

1. On the right side of the **DP/DashBoard/CRM Menu System** screen, select the **Internal Phone List** option from the Maps & Lists section. The Corporate Phone List screen displays.



JOB COST MANAGEMENT

The **Job Cost Management** options require the integration of the **Infinity POWER Job Cost Main Module**. Otherwise, these options will not appear on the menu system as shown above. Each user must also have rights assigned them through either their Security Group or User Rights in order for these options to appear. All security rights are defined through the **Advanced Security Administrator** module.

Options include Add New Job, Change Existing Job, Manage Job Detail, Job Income/Expense Report, Order Job Detail in PO, Enter Job Billing and Manage Job Crew.



Add New Job

This mode allows the user to create a new Job or Project directly from the **DP/DashBoard/CRM Menu System**.

The following screen illustrates where the **Job Cost Management>Add New Job** option is located on the **DP/DashBoard/CRM Menu System** screen.



1. From the Job Cost Management section of the **DP/DashBoard/CRM Main Menu**, <click> the **Add New Job** option. The Add a New Job screen displays.

Job Number	This is the ten (10) character (alpha/numeric) project number to identify this Job/Project.
Description	This is the thirty (30) character (alpha/numeric) description of the job/project. This will be displayed on all reports and screens regarding this job/project.



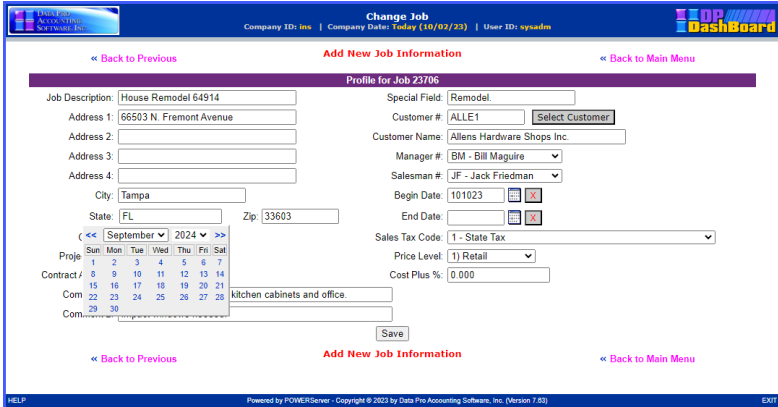
2. Enter a Job Number and Description.

3. <Click> the **Add this Job** button. The Add New Job Information window displays.

The screenshot shows the 'Add New Job Information' window. At the top, it says 'Change Job' and 'Profile for Job 23706'. The window is divided into two columns of input fields. The left column includes: Job Description (House Remodel 64914), Address 1-4, City, State, Zip, Country, Project Type (2) Cost Plus, Contract Amount, Comment 1, and Comment 2. The right column includes: Special Field, Customer # (ALLE1), Select Customer button, Customer Name (Allens Hardware Shops Inc.), Manager # (BM - Bill Maguire), Salesman # (BM - Bill Maguire), Begin Date, End Date, Sales Tax Code (1 - State Tax), Price Level (1) Retail, and Cost Plus % (0.000). Navigation buttons like '<< Back to Previous' and '<< Back to Main Menu' are present. A 'Save' button is at the bottom center. The footer contains 'HELP', 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.03)', and 'EXIT'.

<p>Description</p>	<p>This is the thirty (30) character (alpha/numeric) description of the job/project. This will be displayed on all reports and screens regarding this job/project. This carries over automatically from the prior screen.</p>
<p>Address</p>	<p>This is the physical address of the project you are setting up. If you have elected to use “<i>International Addresses</i>” (a set up feature in <i>Global Functions</i>) the system will include “Country,” as a data field in the address information for this company. The address information will consist of two lines of thirty (30) characters for the address, fifteen (15) characters for the city, fifteen (15) characters for the state, fifteen (15) characters for the country and (10) ten characters for the zip code.</p> <p>For example:</p> <p>Customer Name: ABC Company, Inc. Address: 1706 Main Street Suite 1030 City: Vancouver State: British Columbia Cntry: Canada Zip: V6E4A2</p>
<p>Project Type</p>	<p>This is the classification of the billing method being used for this project. You may <click> the Down Arrow, to view the available choices. The choices available include:</p> <ul style="list-style-type: none"> • Direct Billing • Cost Plus • Percent Complete • Completed Contract • Bank Draw

Direct Billing	This project type assumes that you are going to invoice a customer based on the direct amount of cost incurred on a specific project. This project type allows you to simply record costs as they occur and then bill directly for the charges at the billing rate that you establish for each billing code within this project.
Cost Plus	This project type is designed to keep track of your actual costs on a project and then mark up the cost based on the percentage that you specify for the project. This would be typical if you are handling a project on a Cost plus 10% basis. Regardless of what the costs are, you will be paid for the costs of the project plus 10% for your efforts. The system will print the detail for you to submit with the percentages calculated for you automatically.
Percent Complete	<p>This project type tracks the percentage a project is complete so that you may receive payment on that project's completion schedule. These amounts will automatically be calculated for you and figured into your suggested billing amounts based on budgets you have setup for each code. You also have the flexibility to manually override the percent complete on a project to reflect its actual state even though all costs currently posted to the project may reflect a different percentage of completion.</p> <p>This type of project requires budgets in order to “Calculate Suggested Billing.”</p>
Completed Contract	This project type works in the exact same manner as the Percent Complete project type except that all revenues and cost of goods sold are capitalized until the completion of the contract. Upon the final billing, all capitalized costs and progress billings will be recognized as revenue and cost of sales for financial reporting. All other Job Cost reports print the same as if you were using the Percent Complete project type. The only difference is in the way the General Ledger update is handled.
Bank Draw	<p>This project type is used for securing funds from banks based on the level of completion and on costs of the project. This method allows you to print an “Application For Draw” report for your bank during the construction process. At the completion of the project, when the final sale occurs, revenue and cost of sales will be recognized based on the actual sales price and costs incurred.</p> <p>This type of project requires budgets in order to “Calculate Suggested Billing.” Once you have specified the type of project this is, you may specify if this project is currently completed by <clicking> “on” the Complete checkbox in the Windows or Character-based version of the products. Once a project is complete, you may not perform billing or any other transaction on it.</p>
Contract Amount	This is the set amount of the contract to be billed.
Comments	These are two lines of fifty (50) characters each for any comments that you would like to assign this project. These comments will only be displayed on the Detailed Project Listing and on one of the Project Inquiry screens.
Special	<p>This is a user definable field that you may perform special searching and sorting functions with throughout the system. You may have configured this field in the Master Configuration setup to represent any number of items.</p> <p>If, however, you have configured this field for something like “Scheduled Date of Completion,” keep in mind that the system will always search and sort with numbers first and then alpha characters. If you are using a date and want the report to print in year, then month, then day of month order, then you must enter the date in this format. This is required because this field may also be used as a descriptive field and is not formatted to sort only as a date field.</p>
Customer #	This is the customer number used by the Accounts Receivable module. If you are interactive with this module, enter the customer number or <click> the Select Customer button to the right to verify the customer number entered. Keep in mind though, that if you want the system to provide automatic billing information, the customer must be set up in Accounts Receivable as well as in this data item field with matching numbers.

Customer Name	This field displays the name of the Customer entered into the Customer Number field above.
Manager	This is the project manager assigned to this project. By assigning a project manager, you will be able to print reports by project manager as well as by project.
Salesman #	<p>This is the salesman number used by the Accounts Receivable module. If you are interactive with this module, enter the salesman number or <click> the Down Arrow to call up the list of available salesmen. Select the appropriate salesman to continue.</p> <p>Keep in mind though, that if you want the system to provide automatic billing and sales information, the salesman must be set up in Accounts Receivable as well as in the project file with matching numbers.</p>
Beginning Date	<p>This is the starting date of this project. This is to allow managers to track the beginning dates on a project. If you click on the calendar icon to the right of this field, a calendar will pop allowing you to enter a date. The following screen illustrates how the calendar will be displayed when this option is selected.</p> 
Ending Date	This is the ending date of this project. This is to allow managers to track the ending dates on a project. You may click on the calendar icon to pop up the calendar screen from which to enter a valid date into this field.
Sales Tax Code #	This field only has relevance if you are interactive with the Accounts Receivable Module. This is the Tax Rate Number that has been set up in the tax rate file of the Accounts Receivable module that you would like to assign this project. There should be a tax rate number entered in this field, so any “exempt” customers must be assigned a tax rate that has been set up with zero tax percentages.
Price Level	This specifies the price level to use if you are interactive with the Manufacturing Inventory Management module. Each item in inventory may have up to ten (10) different price levels established and by specifying a level here the system will automatically default to that level of pricing for all inventory items charged to this particular project.
Cost Plus Percent	This is the percentage to use if you have selected the “Cost Plus” option as the project type. This specifies the mark up to use in the automatic calculation of percentages above your recorded cost for this project.

Once all of the information for the new project has been entered, click on the **“Save”** button at the bottom of the screen to continue. The user will be returned to the main **DP/DashBoard/CRM Menu System**.

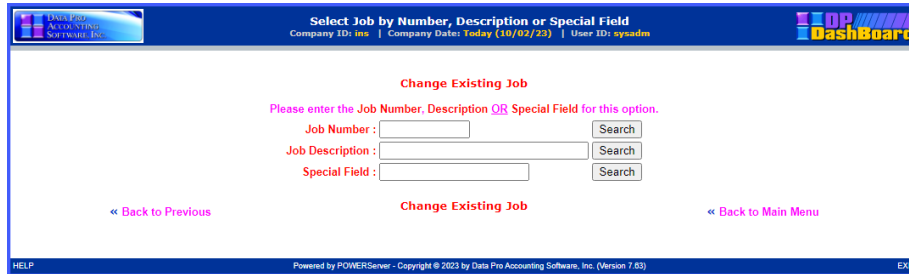
Change Existing Job Change Mode (JC0402)

This option allows you to change information on an existing project. If you have made any mistakes during this set up process, you may return to the **“Change Mode”** option to change any information you have already entered.

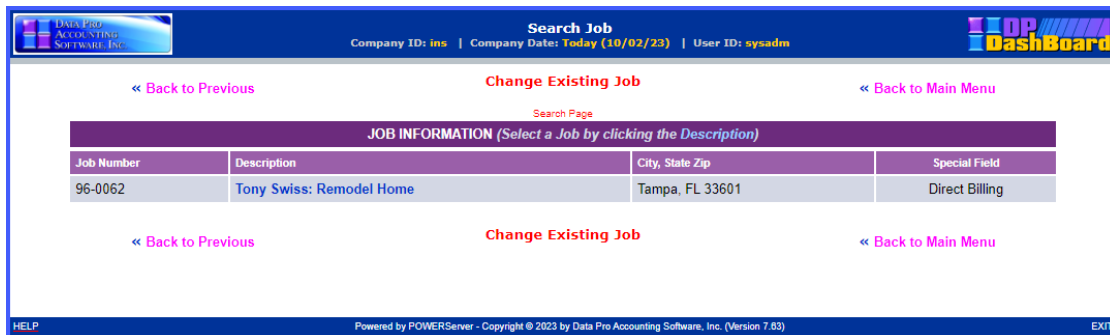
The following screen illustrates where the **Job Cost Management>Change Existing Job** option is located on the DP/DashBoard/CRM Menu System screen.



When you click on this option, the following screen will be displayed. You may search for the Job-by-Job Number, Job Description or the user definable Search Field. After you make your entry into one of these three fields, click on the **“Search”** button to the right to call up the appropriate record.



Once your entry has been made, a near match screen will be displayed similar to the following screen.



If this is the correct Job or Project, click on the highlighted description to continue to edit this record. If not, click on **“Back to Previous”** to try again. If you want to exit altogether, click on **“Back to Main Menu.”** Assuming this is the record you want to change, the following screen will be displayed that will allow for edits to be made.

The screenshot shows the 'Change Existing Job' interface. At the top, it says 'Change Job' with 'Company ID: ins', 'Company Date: Today (10/02/23)', and 'User ID: sysadm'. The main title is 'Change Existing Job'. Below this, there are navigation links: '<< Back to Previous' and '<< Back to Main Menu'. The form is titled 'Profile for Job 96-0062'. It contains two columns of fields. The left column includes: Job Description (Tony Swiss Remodel Home), Address 1 (4201 North Tampa Street), Address 2 (Suite 469), Address 3, Address 4, City (Tampa), State (FL), Zip (33601), Country (US), Project Type (1) Direct Billing, Contract Amount (83700.00), Comment 1 (Plan #4200, Elevation C), and Comment 2 (4 Bedroom, 3 Bath, 2 Car Garage (3200 sq. ft.)). The right column includes: Special Field (Direct Billing), Customer # (SWIS1), Customer Name (Tony Swiss Construction), Manager # (BM - Bill Maguire), Salesman # (JF - Jack Friedman), Begin Date (030923), End Date (101724), Sales Tax Code (99 - Exempt), Price Level (1) Retail, and Cost Plus % (0.000). A 'Save' button is located at the bottom center. At the bottom of the screen, it says 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.83)'. There are also 'HELP' and 'EXIT' buttons in the bottom left and right corners respectively.

Make the changes required and <click> on the “Save” button to save your changes or <click> on the “Cancel” button to cancel the changes made.

Manage Job Detail

The following screen illustrates where the **Job Cost Management>Manage Job Detail** option is located on the **DP/DashBoard/CRM Menu System** screen.

The screenshot shows the 'Job Cost Management' menu. The title bar says 'Job Cost Management [-]'. The menu items are: Add New Job, Change Existing Job, **Manage Job Detail** (highlighted in red), Job Income/Expense Report, Order Job Detail in PO, Enter Job Billing, and Manage Job Crew. At the bottom, it says 'Custom Applications [+]'.

This option is designed to be similar in nature to the standard menu option “**Initial Project Detail**” under the “**Set Up and Maintenance**” option of the **Job Cost Main Module**. It varies slightly in that it will display an on-going real time report of the current job/project number entered into the following screen. You may look for the Job or Project Number by entering the Job Number, Job Description, or the User Defined Special Field. Once entered, click on the “**Search**” button the right of the respective field.

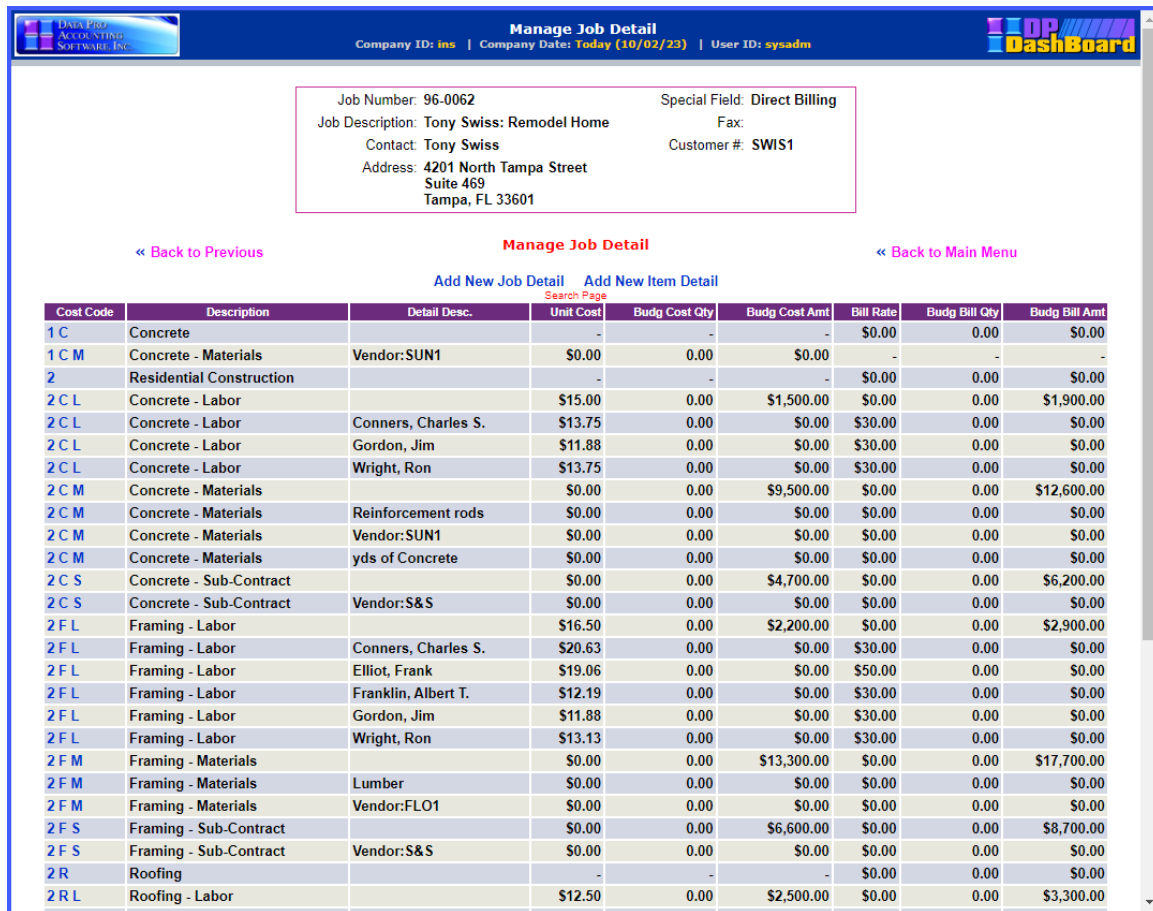
The screenshot shows the 'Manage Job Detail' search screen. The title bar says 'Manage Job Detail'. The main text says 'Please enter the Job Number, Description OR Special Field for this option.'. There are three input fields: 'Job Number :', 'Job Description :', and 'Special Field :'. Each field has a 'Search' button to its right. At the bottom, there are navigation links: '<< Back to Previous' and '<< Back to Main Menu'. At the bottom of the screen, it says 'Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.83)'. There are also 'HELP' and 'EXIT' buttons in the bottom left and right corners respectively.

After your entry has been made, a near match window will appear to display your entry. If this is correct, click into the “**Description**” field of the Job to continue to the next screen.



At this point, the following screen will appear display the current level of detail that exists (if any) for the project selected. This will include all billing amounts as well as any costs amounts. Further, this option will provide a full “drill down” capability not available in the normal Graphical or Character-based versions of the software. Users can then review specific details on each of the cost and billing codes shown on this report and make edits accordingly.

To utilize the “drill down” feature, click on any of the cost or billing codes listed on the left side of the following report.



When you click on the specific cost code the details for that code cost will appear on the new screen that is display as shown on the following screen.

DP DashBoard
 Company ID: *ins* | Company Date: *Today (10/02/23)* | User ID: *sysadm*

Job Number: 96-0062 Special Field: Direct Billing
 Job Description: Tony Swiss: Remodel Home Fax:
 Contact: Tony Swiss Customer #: SWIS1
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

« Back to Previous « Back to Main Menu

Changing Detail for Job 96-0062

Cost Code: 2 C L
 Cost Code Description: Concrete - Labor
 Detail Description: Conners, Charles S.
 Unit Of Measure: Hrs
 Unit Cost: 13.75
 Budget Cost Quantity: 0.00
 Budget Cost Amount: 0.00
 Billing Rate: 30.00
 Budget Billing Quantity: 0.00
 Budget Billing Amount: 0.00

« Back to Previous « Back to Main Menu

HELP Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.03) EXIT

If instead, you click on the option at the top of the report “Add New Job Detail” the following screen will appear. Here you will be allowed to enter either Billing or Cost information for this job or project. There is a pull-down menu on the “Cost Code” that allows you to choose from a valid cost code. Then, you can enter a “Detailed Description” (if this option is turned on) for this allocation to post more detail to the job/project. Once your entry is made, select “Save” to complete your entry and update the system.

DP DashBoard
 Company ID: *ins* | Company Date: *Today (10/02/23)* | User ID: *sysadm*

Job Number: 96-0062 Special Field: Direct Billing
 Job Description: Tony Swiss: Remodel Home Fax:
 Contact: Tony Swiss Customer #: SWIS1
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

« Back to Previous « Back to Main Menu

Adding Detail for Job 96-0062

Cost Code: 1 - Commercial Construction (Billing Only)
 Detail Description:

« Back to Previous « Back to Main Menu

HELP Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.03) EXIT

If you are uncertain which Cost Code to post an entry to, click the down arrow on the right side of the Cost Code field to see a near match listing pop up to scroll through to ensure that you are utilizing a valid cost or billing code with your entry.

This is shown in the following screen.

The screenshot shows the 'Add Job Detail' interface for Job 96-0062. At the top, it displays 'Company ID: ins', 'Company Date: Today (10/02/23)', and 'User ID: sysadm'. The job information includes Job Number 96-0062, Job Description 'Tony Swiss: Remodel Home', Contact 'Tony Swiss', Address '4201 North Tampa Street, Suite 469, Tampa, FL 33601', Special Field 'Direct Billing', and Customer # 'SWIS1'. Below this is a list of cost codes for 'Adding Detail for Job 96-0062'. The selected cost code is '1 F L - Framing - Labor (Cost Only)'. Other visible cost codes include '1 - Commercial Construction (Billing Only)', '1 C - Concrete (Billing Only)', '1 C L - Concrete - Labor (Cost Only)', '1 C M - Concrete - Materials (Cost Only)', '1 C S - Concrete - Sub-Contract (Cost Only)', '1 F - Framing (Billing Only)', '1 F M - Framing - Materials (Cost & Billing Code)', '1 F S - Framing - Sub-Contract (Cost Only)', '1 R - Roofing (Billing Only)', '1 R L - Roofing - Labor (Cost Only)', '1 R M - Roofing - Materials (Cost & Billing Code)', '1 R S - Roofing - Sub-Contract (Cost Only)', '2 - Residential Construction (Billing Only)', '2 C - Concrete (Billing Only)', '2 C L - Concrete - Labor (Cost & Billing Code)', '2 C M - Concrete - Materials (Cost & Billing Code)', '2 C S - Concrete - Sub-Contract (Cost & Billing Code)', '2 F - Framing (Billing Only)', and '2 F L - Framing - Labor (Cost & Billing Code)'. Navigation buttons for 'Back to Previous' and 'Back to Main Menu' are present.

This will allow you to make the detail entry, but prompts you for no specific details regarding quantities or costs. Once you are returned to the previous screen with the drill down listing of all cost codes, you will notice your new Cost Code has been added to this list. From there, you may click on this new Cost Code and then make adjustments to the dollar and quantity amounts to be posted to the Job.

This includes budget amounts for both costs and billing amounts depending on how the actual cost code itself is setup in the Job Cost Main Module. Billing Only Cost Codes can only budget Billing Amounts. Cost Only Cost Codes can only budget cost amounts. Cost and Billing Codes can capture both as shown below. Click on the “Save” button to complete this screen.

The screenshot shows the 'Changing Detail for Job 96-0062' interface. It displays the same job information as the previous screen. The cost code '1 C L' is selected, with a description of 'Concrete - Labor' and a detail description of 'John Havenford'. The unit of measure is 'Hrs', the unit cost is '18.50', the budget cost quantity is '22.5', and the budget cost amount is '416.25'. A 'Save' button is located at the bottom of the form. Navigation buttons for 'Back to Previous' and 'Back to Main Menu' are present.

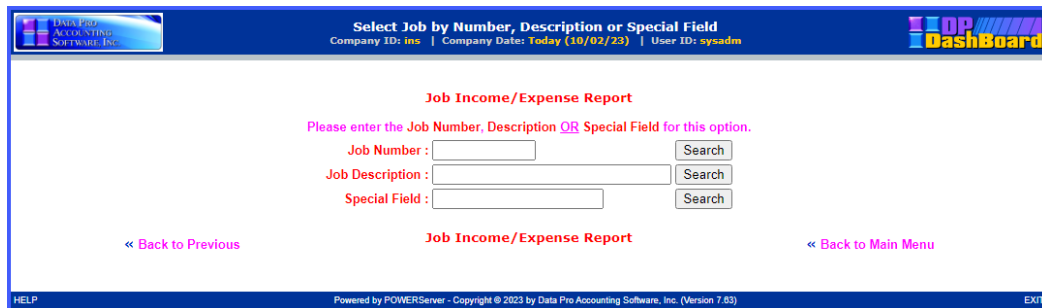
Job Income/Expense Report

The **Job Income/Expense Report** is one of the most highly utilized reports in all of the **Job Cost Main Module**. As such, that is why it has been added for an instant reporting tool on the **DP/DashBoard/CRM** menu system. This report is designed to show the user a snapshot of the revenues and expenses on a project and provide the profitability reporting so that management knows exactly where they stand at all times on the Job.

The following screen illustrates where the **Job Cost Management > Job Income/Expense Report** option is located on the **DP/DashBoard/CRM Menu System** screen.



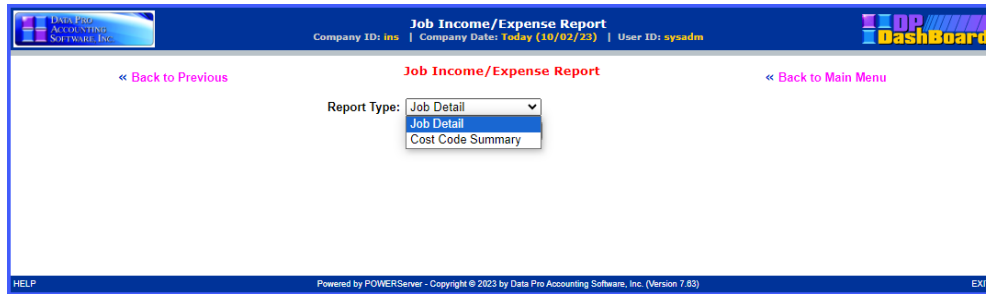
When this option is selected, the following screen will appear.



You may enter the Job Number, Job Description or the User Defined Special Field information and then click on the "Search" button to the right of the respective field to continue. The next screen will appear. Click on the **Description** of the Job to continue.



The following screen will appear that is prompting for which version of the report to run. This would include **Job Detail** or **Cost Code Summary**. Depending on the level of detail you want to see displayed, you would make your selection. For as many details as possible, select "**Job Detail**." For a summary version highlighted at the Cost Code level, choose the latter.



Click on “View Report.” The report will be display to the screen. The two variations are shown on the following screens.

Job Income/Expense Report
Company ID: ins | Company Date: Today (10/02/23) | User ID: sysadm

Job Number: 96-0062
Job Description: Tony Swiss: Remodel Home
Contact: Tony Swiss
Address: 4201 North Tampa Street
Suite 409
Tampa, FL 33601

Special Field: Direct Billing
Fax
Customer #: SWIS1

Job Income/Expense Report

Cost Code	Description	Detail Desc	Month-To-Date	Year-To-Date	Project-To-Date	Project Budget	Variance	% Buds
			INCOME					
2 C L	Concrete - Labor		\$1,900.00	\$1,900.00	\$1,900.00	\$1,900.00	\$0.00	100%
2 C M	Concrete - Materials		\$0.00	\$0.00	\$0.00	\$12,600.00	\$12,600.00	0%
2 C M	Concrete - Materials	Vendor: SUN1	\$0.00	\$12,600.00	\$12,600.00	\$0.00	\$12,600.00	0%
2 C S	Concrete - Sub-Contract		\$0.00	\$0.00	\$0.00	\$6,200.00	\$6,200.00	0%
2 C S	Concrete - Sub-Contract	Vendor: S&S	\$6,200.00	\$6,200.00	\$6,200.00	\$0.00	\$6,200.00	0%
2 F L	Framing - Labor		\$2,900.00	\$2,900.00	\$2,900.00	\$2,900.00	\$0.00	100%
2 F M	Framing - Materials		\$0.00	\$0.00	\$0.00	\$17,700.00	\$17,700.00	0%
2 F M	Framing - Materials	Vendor: FLO1	\$17,700.00	\$17,700.00	\$17,700.00	\$0.00	\$17,700.00	0%
2 F S	Framing - Sub-Contract		\$0.00	\$0.00	\$0.00	\$8,700.00	\$8,700.00	0%
2 F S	Framing - Sub-Contract	Vendor: S&S	\$8,700.00	\$8,700.00	\$8,700.00	\$0.00	\$8,700.00	0%
2 R L	Roofing - Labor		\$0.00	\$0.00	\$0.00	\$3,300.00	\$0.00	100%
2 R M	Roofing - Materials		\$0.00	\$0.00	\$0.00	\$20,300.00	\$20,300.00	0%
2 R M	Roofing - Materials	Vendor: BOW1	\$20,300.00	\$20,300.00	\$20,300.00	\$0.00	\$20,300.00	0%
2 R S	Roofing - Sub-Contract		\$0.00	\$0.00	\$0.00	\$10,100.00	\$10,100.00	0%
2 R S	Roofing - Sub-Contract	Vendor: S&S	\$10,100.00	\$10,100.00	\$10,100.00	\$0.00	\$10,100.00	0%
Total Income:			\$87,800.00	\$80,400.00	\$83,700.00	\$83,700.00	\$0.00	100%
			EXPENSE					
2 C L	Concrete - Labor		\$0.00	\$0.00	\$0.00	\$1,500.00	-\$1,200.00	0%
2 C L	Concrete - Labor	Gordon, Jim	\$412.50	\$412.50	\$412.50	\$0.00	\$412.50	0%
2 C L	Concrete - Labor	Wright, Ron	\$1,100.00	\$1,100.00	\$1,100.00	\$0.00	\$1,100.00	0%
2 C M	Concrete - Materials		\$0.00	\$0.00	\$0.00	\$9,500.00	-\$9,500.00	0%
2 C M	Concrete - Materials	Vendor: SUN1	\$0.00	\$9,485.75	\$9,485.75	\$0.00	\$9,485.75	0%
2 C S	Concrete - Sub-Contract		\$0.00	\$0.00	\$0.00	\$4,700.00	-\$4,700.00	0%
2 C S	Concrete - Sub-Contract	Vendor: S&S	\$4,680.00	\$4,680.00	\$4,680.00	\$0.00	\$4,680.00	0%
2 F L	Framing - Labor		\$0.00	\$0.00	\$0.00	\$2,200.00	-\$2,200.00	0%
2 F L	Framing - Labor	Elliot, Frank	\$1,300.00	\$1,300.00	\$1,300.00	\$0.00	\$1,300.00	0%
2 F L	Framing - Labor	Franklin, Albert T.	\$975.00	\$975.00	\$975.00	\$0.00	\$975.00	0%
2 F M	Framing - Materials		\$0.00	\$0.00	\$0.00	\$13,300.00	-\$13,300.00	0%
2 F M	Framing - Materials	Vendor: FLO1	\$13,335.66	\$13,335.66	\$13,335.66	\$0.00	\$13,335.66	0%
2 F S	Framing - Sub-Contract		\$0.00	\$0.00	\$0.00	\$6,600.00	-\$6,600.00	0%
2 F S	Framing - Sub-Contract	Vendor: S&S	\$6,600.00	\$6,600.00	\$6,600.00	\$0.00	\$6,600.00	0%
2 R L	Roofing - Labor		\$0.00	\$0.00	\$0.00	\$2,000.00	-\$2,000.00	0%
2 R L	Roofing - Labor	Connors, Charles S.	\$0.00	\$0.00	\$1,275.00	\$0.00	\$1,275.00	0%
2 R L	Roofing - Labor	Elliot, Frank	\$0.00	\$0.00	\$1,300.00	\$0.00	\$1,300.00	0%
2 R M	Roofing - Materials		\$0.00	\$0.00	\$0.00	\$15,300.00	-\$15,300.00	0%
2 R M	Roofing - Materials	Vendor: BOW1	\$7,694.03	\$7,694.03	\$15,294.03	\$0.00	\$15,294.03	0%
2 R S	Roofing - Sub-Contract		\$0.00	\$0.00	\$0.00	\$7,600.00	-\$7,600.00	0%
2 R S	Roofing - Sub-Contract	Vendor: S&S	\$7,620.00	\$7,620.00	\$7,620.00	\$0.00	\$7,620.00	0%
Total Expense:			\$43,667.19	\$53,152.94	\$63,477.94	\$63,200.00	-\$277.94	100%
Net Income:			\$24,132.81	\$27,247.06	\$20,222.06	\$20,500.00	-\$277.94	99%

Job Income/Expense Report
Company ID: ins | Company Date: 02/28/21* | User ID: sysadm

Job Number: 96-0062
Job Description: Tony Swiss: Remodel Home
Contact: Tony Swiss
Address: 4201 North Tampa Street
Suite 409
Tampa, FL 33601

Special Field: Direct Billing
Fax
Customer #: SWIS1

Job Income/Expense Report

Cost Code	Description	Month-To-Date	Year-To-Date	Project-To-Date	Project Budget	Variance	% Buds
		INCOME					
2 C L	Concrete - Labor	\$1,900.00	\$1,900.00	\$1,900.00	\$1,900.00	\$0.00	100%
2 C M	Concrete - Materials	\$0.00	\$12,600.00	\$12,600.00	\$12,600.00	\$0.00	100%
2 C S	Concrete - Sub-Contract	\$6,200.00	\$6,200.00	\$6,200.00	\$6,200.00	\$0.00	100%
2 F L	Framing - Labor	\$2,900.00	\$2,900.00	\$2,900.00	\$2,900.00	\$0.00	100%
2 F M	Framing - Materials	\$17,700.00	\$17,700.00	\$17,700.00	\$17,700.00	\$0.00	100%
2 F S	Framing - Sub-Contract	\$8,700.00	\$8,700.00	\$8,700.00	\$8,700.00	\$0.00	100%
2 R L	Roofing - Labor	\$0.00	\$0.00	\$3,300.00	\$3,300.00	\$0.00	100%
2 R M	Roofing - Materials	\$20,300.00	\$20,300.00	\$20,300.00	\$20,300.00	\$0.00	100%
2 R S	Roofing - Sub-Contract	\$10,100.00	\$10,100.00	\$10,100.00	\$10,100.00	\$0.00	100%
Total Income:		\$87,800.00	\$80,400.00	\$83,700.00	\$83,700.00	\$0.00	100%
		EXPENSE					
2 C L	Concrete - Labor	\$1,512.50	\$1,512.50	\$1,512.50	\$1,500.00	\$12.50	101%
2 C M	Concrete - Materials	\$0.00	\$9,485.75	\$9,485.75	\$9,500.00	-\$14.25	100%
2 C S	Concrete - Sub-Contract	\$4,680.00	\$4,680.00	\$4,680.00	\$4,700.00	-\$20.00	100%
2 F L	Framing - Labor	\$2,325.00	\$2,325.00	\$2,325.00	\$2,200.00	\$125.00	106%
2 F M	Framing - Materials	\$13,335.66	\$13,335.66	\$13,335.66	\$13,300.00	\$35.66	100%
2 F S	Framing - Sub-Contract	\$6,600.00	\$6,600.00	\$6,600.00	\$6,600.00	\$0.00	100%
2 R L	Roofing - Labor	\$0.00	\$0.00	\$2,625.00	\$2,500.00	\$125.00	105%
2 R M	Roofing - Materials	\$7,694.03	\$7,694.03	\$15,294.03	\$15,300.00	-\$6.97	100%
2 R S	Roofing - Sub-Contract	\$7,620.00	\$7,620.00	\$7,620.00	\$7,600.00	\$20.00	100%
Total Expense:		\$43,667.19	\$53,152.94	\$63,477.94	\$63,200.00	-\$277.94	100%
Net Income:		\$24,132.81	\$27,247.06	\$20,222.06	\$20,500.00	-\$277.94	99%

Order Job Detail in PO

The following screen illustrates where the **Job Cost Management>Order Job Detail in PO** option is located on the **DP/DashBoard/CRM Menu System** screen.



You may enter the Job Number, Job Description or the User Defined Special Field information and then click on the “Search” button to the right of the respective field to continue. The next screen will appear. Click on the **Description** of the Job to continue.



All of the current details for the selected Job will be displayed on the screen. Notice on the far-right side of the screen that there is a column of blank fields next to each cost code line item whereby the user may go through and now enter the quantity amounts for the items that are desired to be ordered for this specific Job.

DP/DashBoard/CRM User Manual

Order Job Detail in PO
 Company ID: ins | Company Date: Today (10/02/23) | User ID: sysadm

Job Number: 96-0062
 Job Description: Tony Swiss: Remodel Home
 Contact: Tony Swiss
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

Special Field: Direct Billing
 Fax:
 Customer #: SWIS1

Order Job Detail in PO

Code	Description	Detail Desc	Unit Cost	Qty	Sub-Contract	Vendor	Price	Ext	Ext	Ext	Ext	Ext	Ext
1 C L	Concrete - Labor	John Havenford	\$15.00	22.00	\$416.25								
1 C M	Concrete - Materials	Vendor: SUN1	\$0.00	0.00	\$0.00								
2 C L	Concrete - Labor		\$15.00	0.00	\$1,500.00								
2 C L	Concrete - Labor	Comers, Charles S.	\$13.75	0.00	\$0.00								
2 C L	Concrete - Labor	Gordon, Jim	\$13.75	0.00	\$0.00								
2 C L	Concrete - Labor	Wright, Ron	\$13.75	0.00	\$0.00								
2 C M	Concrete - Materials		\$0.00	0.00	\$8,500.00								
2 C M	Concrete - Materials	Reinforcement rods	\$0.00	0.00	\$0.00								
2 C M	Concrete - Materials	Vendor: SUN1	\$0.00	0.00	\$0.00								
2 C M	Concrete - Materials	ysls of Concrete	\$0.00	0.00	\$0.00								
2 C S	Concrete - Sub-Contract		\$0.00	0.00	\$4,700.00								
2 C S	Concrete - Sub-Contract	Vendor: S&S	\$0.00	0.00	\$0.00								
2 F L	Framing - Labor		\$16.00	0.00	\$2,200.00								
2 F L	Framing - Labor	Comers, Charles S.	\$20.83	0.00	\$0.00								
2 F L	Framing - Labor	Elkot, Frank	\$19.06	0.00	\$0.00								
2 F L	Framing - Labor	Franklin, Albert T.	\$12.19	0.00	\$0.00								
2 F L	Framing - Labor	Gordon, Jim	\$11.88	0.00	\$0.00								
2 F L	Framing - Labor	Wright, Ron	\$12.13	0.00	\$0.00								
2 F M	Framing - Materials		\$0.00	0.00	\$13,300.00								
2 F M	Framing - Materials	Lumber	\$0.00	0.00	\$0.00								
2 F M	Framing - Materials	Vendor: FLO1	\$0.00	0.00	\$0.00								
2 F S	Framing - Sub-Contract		\$0.00	0.00	\$6,000.00								
2 F S	Framing - Sub-Contract	Vendor: S&S	\$0.00	0.00	\$0.00								
2 R L	Roofing - Labor		\$12.00	0.00	\$2,500.00								
2 R L	Roofing - Labor	Comers, Charles S.	\$12.00	0.00	\$0.00								
2 R L	Roofing - Labor	Elkot, Frank	\$16.88	0.00	\$0.00								
2 R L	Roofing - Labor	Franklin, Albert T.	\$12.19	0.00	\$0.00								
2 R L	Roofing - Labor	Gordon, Jim	\$11.88	0.00	\$0.00								
2 R M	Roofing - Materials		\$0.00	0.00	\$15,300.00								
2 R M	Roofing - Materials	Trusses	\$0.00	0.00	\$0.00								
2 R M	Roofing - Materials	Vendor: BOW1	\$0.00	0.00	\$0.00								
2 R S	Roofing - Sub-Contract		\$0.00	0.00	\$7,600.00								
2 R S	Roofing - Sub-Contract	Vendor: S&S	\$0.00	0.00	\$0.00								
9*	Overhead Allocated		\$0.00	0.00	\$0.00								
			Totals:	22.00	\$63,616.25								

Select the Vendor to place the Purchase Order of the above items.
 Vendor Number:

Order Job Detail in PO

At the bottom of this screen, the user is allowed to select the “Vendor” to which this Purchase Order is to be issued. If the down arrow is selected next to the Vendor Number field, a scrolling display window pops up to show a complete list of current vendors available to choose from. These are all valid vendors currently set up in the Accounts Payable Master File.

2 R M	Roofing - Materials	Trusses	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 R M	Roofing - Materials	Vendor: BOW1	\$0.00	0.00	\$0.00	2.00	\$15,294.03	
2 R S	Roofing - Sub-Contract		\$0.00	0.00	\$7,600.00	0.00	\$0.00	
2 R S	Roofing - Sub-Contract	Vendor: S&S	\$0.00	0.00	\$0.00	127.00	\$7,620.00	
9*	Overhead Allocated		\$0.00	0.00	\$0.00	0.00	\$0.00	
			Totals:	22.00	\$63,616.25	1,223.00	\$63,477.94	

Select the Vendor to place the Purchase Order of the above items.
 Vendor Number:

Order Job Detail in PO

Once the Vendor has been selected and all quantities confirmed, click on the “Place Order” button and the system will automatically create a Purchase Order in the **Infinity POWER Purchase Order Entry** module with all of the highlighted information and quantities. The system will update all Job information simultaneously as well. When the update is completed, the following screen will appear confirming the new Purchase Order number.

Save Job Order
 Company ID: ins | Company Date: Today (10/02/23) | User ID: sysadm

Job Number: 96-0062
 Job Description: Tony Swiss: Remodel Home
 Contact: Tony Swiss
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

Special Field: Direct Billing
 Fax:
 Customer #: SWIS1

Purchase Order number 100159 has been added.

Return to the Menu

HELP Powered by POWERServer - Copyright © 2023 by Data Pro Accounting Software, Inc. (Version 7.83) EXIT

Enter Job Billing

This option allows you to enter information to prepare the system to perform Job Billing.

The following screen illustrates where the **Job Cost Management>Enter Job Billing** option is located on the **DP/DashBoard/CRM Menu System** screen.



When you select this option, you will be prompted to enter the Job Number. You may enter the Job Number, Job Description or the User Defined Special Field information and then click on the **“Search”** button to the right of the respective field to continue.



The next screen will appear. Click on the **Description** of the Job to continue.



DP/DashBoard/CRM User Manual

An entry screen illustrating all of the billing codes for the selected Job will be displayed.

Enter Job Billing
 Company ID: ins | Company Date: Today (10/02/23) | User ID: sysadm

Job Number: 96-0062
 Job Description: Tony Swiss: Remodel Home
 Contact: Tony Swiss
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

Special Field: Direct Billing
 Fax:
 Customer #: SWIS1

Cost Code	Description	Detail Desc	Bill Rate	Orig Bill Qty	Orig Bill Amt	PRD Bill Qty	PRD Bill Amt	Qty To Bill
1 C	Concrete		\$0.00	0.00	\$0.00	0.00	\$0.00	
2	Residential Construction		\$0.00	0.00	\$0.00	0.00	\$0.00	
2 C L	Concrete - Labor		\$0.00	0.00	\$1,900.00	110.00	\$0.00	
2 C L	Concrete - Labor	Connors, Charles S.	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 C L	Concrete - Labor	Gordon, Jim	\$0.00	0.00	\$0.00	0.00	\$412.50	
2 C L	Concrete - Labor	Wright, Ron	\$0.00	0.00	\$0.00	0.00	\$1,100.00	
2 C M	Concrete - Materials		\$0.00	0.00	\$12,600.00	0.00	\$0.00	
2 C M	Concrete - Materials	Reinforcement rods	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 C M	Concrete - Materials	Vendor:SWI1	\$0.00	0.00	\$0.00	470.00	\$9,457.70	
2 C M	Concrete - Materials	yds of Concrete	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 C S	Concrete - Sub-Contract		\$0.00	0.00	\$6,200.00	0.00	\$0.00	
2 C S	Concrete - Sub-Contract	Vendor:SKS	\$0.00	0.00	\$0.00	78.00	\$4,680.00	
2 F L	Framing - Labor		\$0.00	0.00	\$2,900.00	160.00	\$0.00	
2 F L	Framing - Labor	Connors, Charles S.	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 F L	Framing - Labor	Elliott, Frank	\$0.00	0.00	\$0.00	0.00	\$1,200.00	
2 F L	Framing - Labor	Franklin, Albert T.	\$0.00	0.00	\$0.00	0.00	\$975.00	
2 F L	Framing - Labor	Gordon, Jim	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 F L	Framing - Labor	Wright, Ron	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 F M	Framing - Materials		\$0.00	0.00	\$17,700.00	0.00	\$0.00	
2 F M	Framing - Materials	Lumber	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 F M	Framing - Materials	Vendor:FLO1	\$0.00	0.00	\$0.00	1.00	\$13,238.64	
2 F S	Framing - Sub-Contract		\$0.00	0.00	\$0,700.00	0.00	\$0.00	
2 F S	Framing - Sub-Contract	Vendor:SKS	\$0.00	0.00	\$0.00	110.00	\$6,600.00	
2 R	Roofing		\$0.00	0.00	\$0.00	0.00	\$0.00	
2 R L	Roofing - Labor		\$0.00	0.00	\$3,200.00	100.00	\$0.00	
2 R L	Roofing - Labor	Connors, Charles S.	\$0.00	0.00	\$0.00	0.00	\$1,275.00	
2 R L	Roofing - Labor	Elliott, Frank	\$0.00	0.00	\$0.00	0.00	\$1,050.00	
2 R L	Roofing - Labor	Franklin, Albert T.	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 R L	Roofing - Labor	Gordon, Jim	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 R M	Roofing - Materials		\$0.00	0.00	\$20,200.00	0.00	\$0.00	
2 R M	Roofing - Materials	Tarps	\$0.00	0.00	\$0.00	0.00	\$0.00	
2 R M	Roofing - Materials	Vendor:DW1	\$0.00	0.00	\$0.00	1.00	\$15,294.03	
2 R S	Roofing - Sub-Contract		\$0.00	0.00	\$10,100.00	0.00	\$0.00	
2 R S	Roofing - Sub-Contract	Vendor:SKS	\$0.00	0.00	\$0.00	127.00	\$7,620.00	
		Totals:	\$0.00	0.00	\$83,700.00	1,222.00	\$63,477.94	

Only those codes that are “Billing Only” or “Cost and Billing Codes” will be allowed to have entries made to them for billing purposes. Enter the amounts that you want to bill for on either an overall level or you can bill at a specific cost code level. The choice is yours. Once the billing amounts are entered to your satisfaction, click on the button at the bottom, “Save Billing.”

Roofing - Sub-Contract	Vendor:SKS	\$0.00	0.00	\$0.00	127.00	\$7,620.00	
Totals:		0.00	0.00	\$83,700.00	1,222.00	\$63,477.94	

Save Billing
 Enter Job Billing

Back to Previous Back to Main Menu

An update screen will appear providing you with the status of the update.

Save Job Billing
 Company ID: ins | Company Date: Today (10/02/23) | User ID: sysadm

Job Number: 96-0062
 Job Description: Tony Swiss: Remodel Home
 Contact: Tony Swiss
 Address: 4201 North Tampa Street
 Suite 469
 Tampa, FL 33601

Special Field: Direct Billing
 Fax:
 Customer #: SWIS1

The billing information has been saved.

Return to the Menu

All remaining Job Cost Main Module function would be performed from within the standard accounting modules.

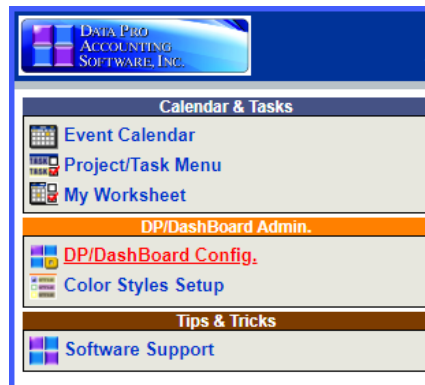
Manage Job Crew

This option allows you to enter information to prepare the system to perform Job Billing.

The following screen illustrates where the **Job Cost Management>Manage Job Crew** option is located on the **DP/DashBoard/CRM Menu System** screen.



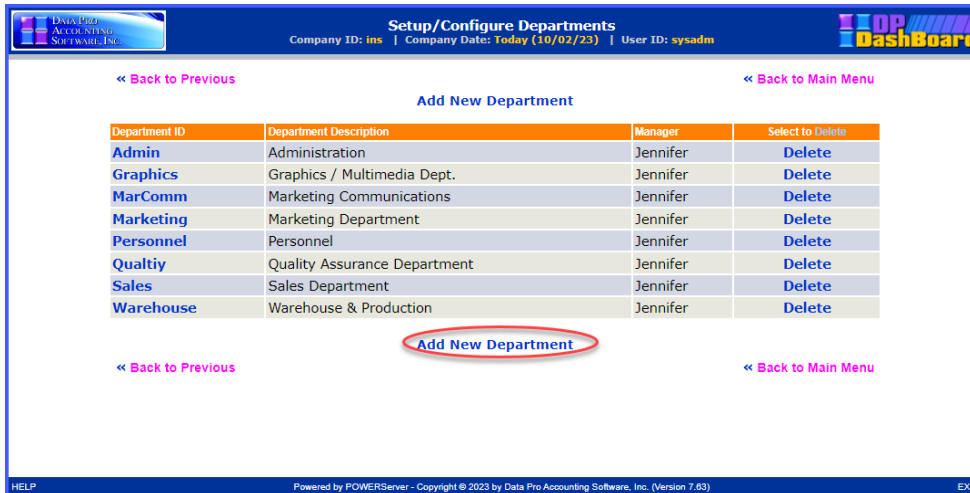
Before you utilize this option, there are some additional steps that need to be taken in the **DP/DashBoard Admin. Menu** section as shown below.



Select the **DP/DashBoard Config.** menu option. Then, choose **“Setup/Configure Departments”** from the following screen:



A list of your current Departments will be shown:



Click on the option to “Add New Department” as shown circled in red. The following screen will appear prompting you to enter a Department ID, Description and to select a manager from a pull-down list.



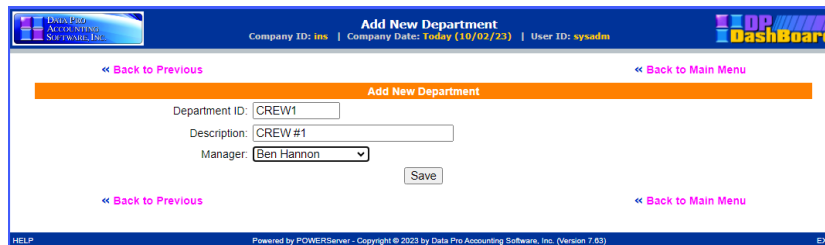
What you are adding here are the names and descriptions of the “labor crews” that you want to allocate to various jobs/projects. There can be one or several. You can mix and match various managers and team members across crews to work on different jobs.

The purpose of this option is that the manager is most likely to have access to a tablet or laptop computer in the field or their working environment with Internet access. That means that they can get access to the DP/DashBoard/CRM software system. It is unlikely that all of your workers will have the same.

Therefore, the purpose of this option is to allow the crew manager to be able to login to a job while in the field and tell the system which individuals are actually on-site and working on a specific job and what role they are performing on the job by allocating their labor costs to a specific Job Cost Cost Code on that job/project.

This option defines the “crews.” In this example, we’ll define two “crews.”

Fill out the fields and then click on the “Save” button as shown below to save the first crew.



DP/DashBoard/CRM User Manual

The Department listing has now been updated as shown below:

Department ID	Department Description	Manager	Select to Delete
Admin	Administration	Jennifer	Delete
CREW1	CREW #1	BenH	Delete
CREW2	CREW #2	Jennifer	Delete
Graphics	Graphics / Multimedia Dept.	Jennifer	Delete
MarComm	Marketing Communications	Jennifer	Delete
Marketing	Marketing Department	Jennifer	Delete
Personnel	Personnel	Jennifer	Delete
Quality	Quality Assurance Department	Jennifer	Delete
Sales	Sales Department	Jennifer	Delete
Warehouse	Warehouse & Production	Jennifer	Delete

Once the Departments have been defined, then users within the DP/DashBoard/CRM program have to be assigned to these Departments so that the “Manage Job Crew” feature can be utilized.

Going back to the DP/DashBoard Configuration options, now you will select the “Setup/Configure Users” option as shown on the following screen.

DP/DashBoard Configuration Options
Global Configuration Options
Setup/Configure Departments
Setup/Configure Users
Setup/Configure Resources
Setup Maps & Directions
Setup Company Logo and Phone Numbers
Setup Available Companies
Setup Marketing Documents
Setup Corporate Documents
Setup Product Documents
Setup Sales Documents
Setup Technical Documents
Setup Software Support
Configure Email Broadcasts

Select an employee from the Employee listing to assign to one of the new “Crew” departments.

TONY G	User Name: Tony Gomez Department: Warehouse Position: Production Manager Location: Tampa Plant	Phone: 813-568-7151 Ext: Cell Phone: 813-654-6841 E-Mail: tonyg@gmail.com Salesman: HOUSE
---------------	---	--

Once the employee is chosen, the pull-down list for Departments allows you to choose the proper department to assign this user.

Click on “Change” to save your choices.

Now, you can continue back to the option under the “Job Cost Management” menu to “Manage Job Crew.”

When you select this option, you will be prompted to enter the Job Number. You may enter the Job Number, Job Description or the User Defined Special Field information and then click on the “Search” button to the right of the respective field to continue.

The next screen will appear. Click on the **Description** of the Job to continue.

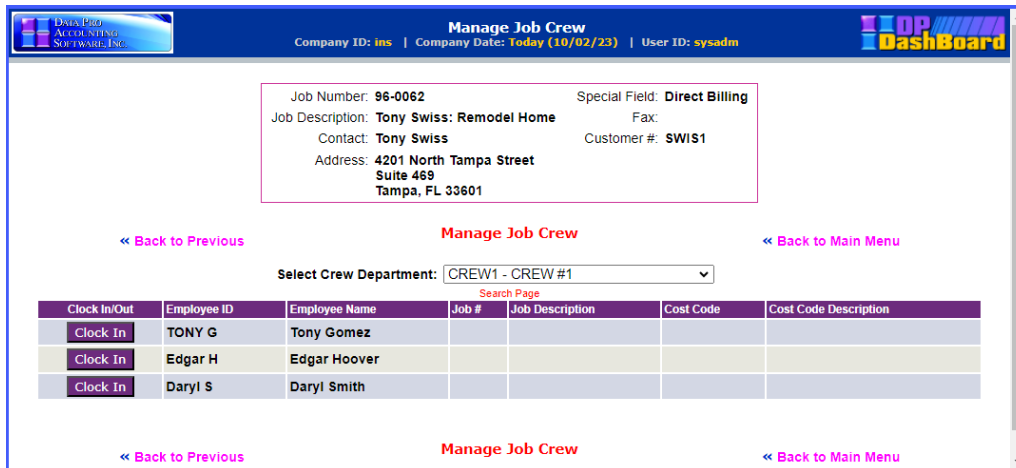
Job Number	Description	City, State Zip	Special Field
96-0062	Tony Swiss: Remodel Home	Tampa, FL 33601	Direct Billing

An entry screen for the selected Job Number will appear allowing for the allocation of payroll time for employees that have worked on the selected Job Number. The following illustrates all of the default “Departments” available the first time you go through this option in the DP/DashBoard/CRM system.

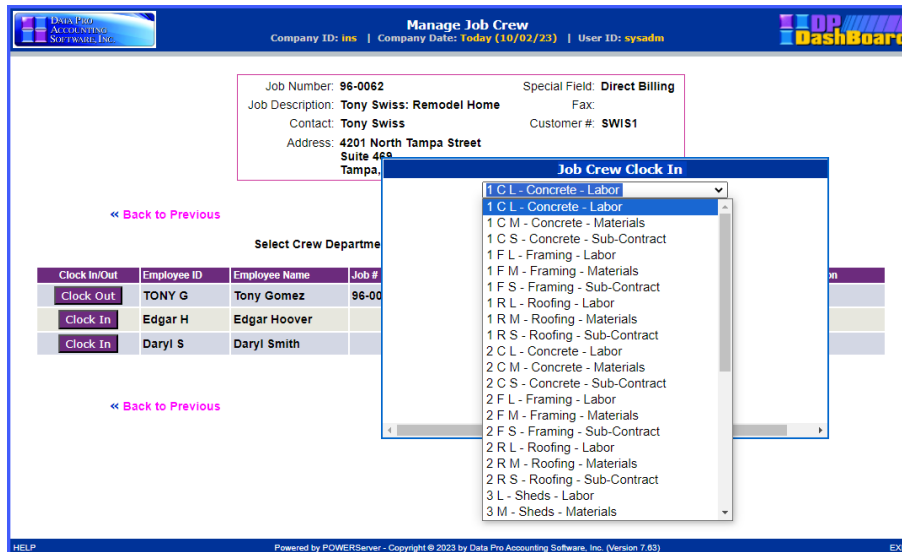


The user will be able then override the default “Crew Departments” using a pull-down menu bar that will list all of the available Departments in which Employees can be made available to allocate to the specified Job Number.

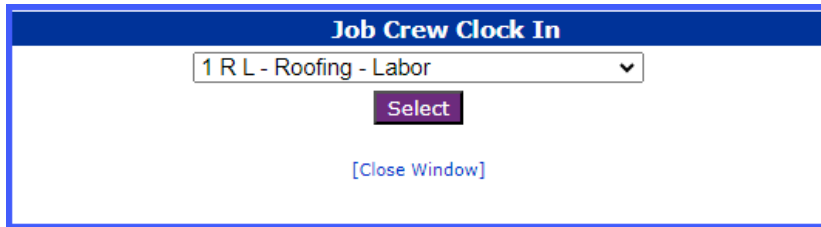
Once the Department is identified, a list of available employees will be displayed and if budgeted to a job, their default Job Cost Codes and Descriptions. If not, the manager will assign these allocations during this process.



Click on the “Clock In” button for the desired Employee ID to allocate this employee to a specific Cost Code from a pull-down menu of valid cost codes as shown on the following screen:



The cost code, when selected, will be displayed. Click on the “Select” button to validate your choice.

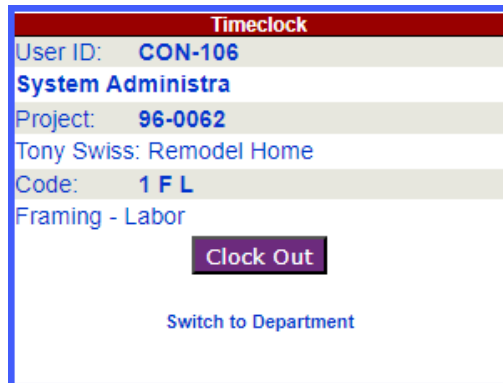


The screenshot shows a window titled "Job Crew Clock In". At the top, there is a dropdown menu displaying "1 R L - Roofing - Labor". Below the dropdown is a purple button labeled "Select". At the bottom of the window, there is a blue link that says "[Close Window]".

The employees will remain clocked in until their manager clicks on the “Clock Out” button to stop their allocation on this job or re-allocates them to a different cost code on this job/project or another job/project altogether. This time entry is accumulated as part of the Timeclock Entry data and can be edited by the manager or the payroll department prior to the posting of Timesheets to the Payroll module for processing.

A manager can allocate and clock employees in and out throughout the day from virtually anywhere as the projects progresses and make sure employees’ times are correctly allocated to the job/projects and cost codes where they belong in “real time.”

The manager does not have to clock in to the Timeclock option on the DP/DashBoard/CRM menu to utilize this feature. That person, may in fact be on salary. Or, they could clock in using this feature utilizing their time as a member of the various crews for accurate allocation of their expenses to the various job/projects as well.



The screenshot shows a window titled "Timeclock". It contains the following information: User ID: CON-106, System Administrator, Project: 96-0062, Tony Swiss: Remodel Home, Code: 1 F L, Framing - Labor. At the bottom, there is a purple button labeled "Clock Out" and a blue link that says "Switch to Department".

DOCUMENTATION

The Documentation section of the DP/DashBoard/CRM Menu System screen is where various different company documents and links can be “housed” so that they are easily accessed, managed, and ready on demand.

A key feature of this centralized Documentation Management function makes it possible to control access to specific documents. User rights determine if an employee can see all available documents or just departments that are specified. For instance, if a user is assigned to the Technical Support department, they may not be given access to Sales information. In that case, that user will not even see the Sales Documents menu option in the Documentation section at all.

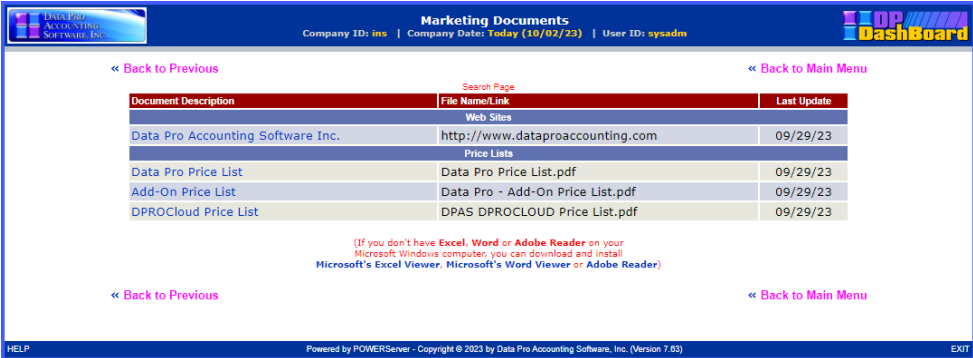
DP/DashBoard/CRM is configured for the following documents: Marketing Documents, Corporate Documents, Product Documents, Sales Documents, and Technical Documents. All these menu options are user-defined in the DP/DashBoard/CRM Admin>DP/DashBoard/CRM Config options. Titles, headings, images, and main menu icons can all be customized to what you want them to be.

These features are accessible in the Documentation section of the DP/DashBoard/CRM Menu System screen.

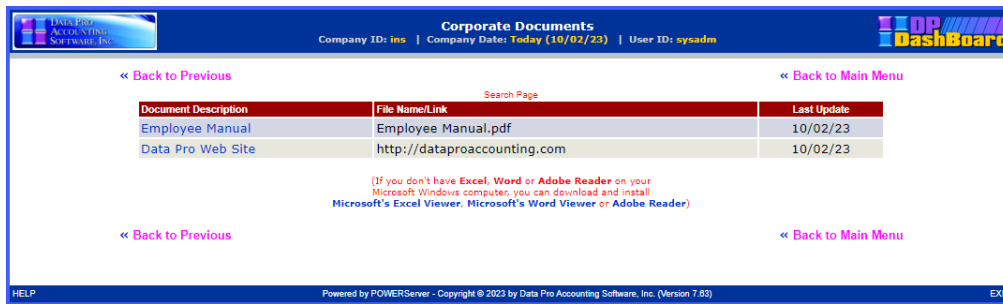


Sample Documents

The following screen is an example of the types of documents you may consider adding to the Marketing Documents section. Price lists, product data sheets, order forms, references, etc., are all documents that are beneficial to have handy for employees and for potential customers. Notice how headings break up the different types of data sheets into categories. These are features you define!



The following screen is an example of the types of documents you may consider adding to the Corporate Documents section. Remember, all document categories and associated features can be customized and renamed.

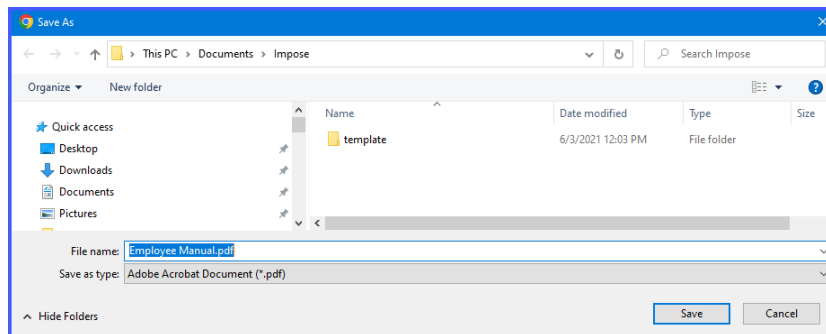
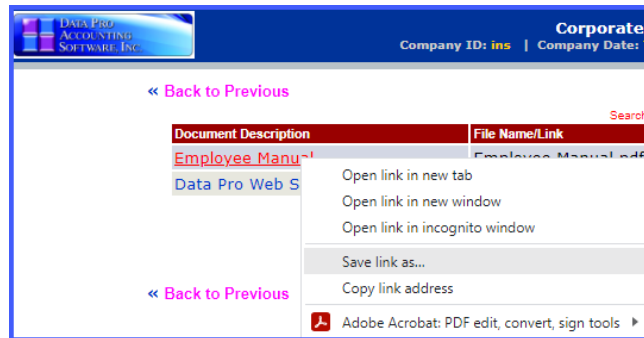


General Documentation Functions

The following sections describe procedures on how to open documents from the **DP/DashBoard/CRM Menu System** screen, print documents on demand, and download documents. These procedures can be performed from any of the Document screens (i.e. Marketing Document, Corporate Documents, etc.) under the Documentation section of the **DP/DashBoard/CRM Menu System** screen.

To Download a Document:

1. In the appropriate Documents screen, <right-click> the desired document to be downloaded and select the **Save Link As** option. The Save As Type window displays.

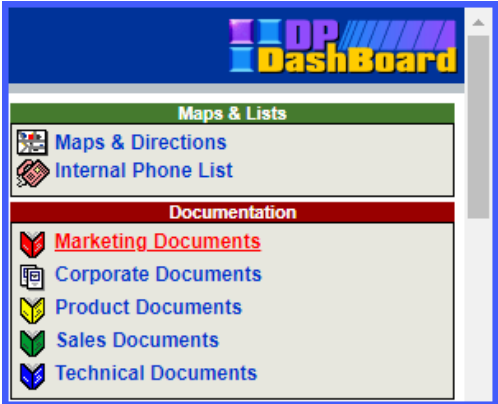


2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.

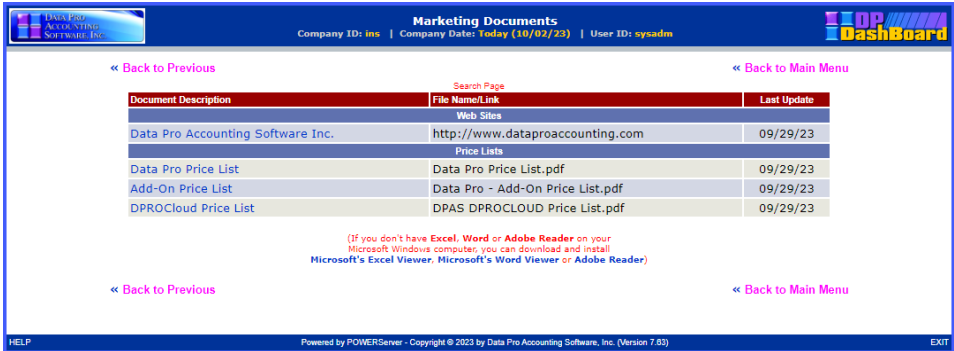
- 4. If appropriate, change the file type in the **Save as type** pull-down menu.
- 5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

To View a Document or Link:

- 1. On the right side of the **DP/DashBoard/CRM Menu System** screen, select the desired **Documents** (i.e. Marketing Documents, Corporate Documents, etc.) option from the **Documentation** section). The appropriate Documents screen displays.



- 2. <Click> the desired document or link to open from the **Document Description** column. The document /link opens in the appropriate associated program.



NOTE

You must have the associated application loaded on your system in order for the document to open (i.e. if you are trying to open an .xls file, you need to have Microsoft Excel loaded on your system.)