



Efficiency

Common Features

Version 4.6

Table of Contents

Start up Efficiency	5
Start-up Options	5
Efficiency Menu System	6
System Menu.....	6
Pop-up Menu System	15
Attachments Bars.....	23
Sayings	25
Data Entry and Maintenance	25
Remarks and Notes	30
Codes and Flags	33
Standard Reports.....	35
Print Function	37
Sort Function.....	38
Filter Function.....	39
Save As.....	40
Email.....	41
SMS Messaging.....	42
Pictures and Objects.....	44
User Flags.....	46
Search Engine.....	47
Data Expansion.....	48
Profiles.....	50
Module Defaults.....	52
Record Duplication.....	52
Statistics	52
Graphics	53
Top and Bottom Enquiry or Best and Worst Performers.....	56
Performance Analysis.....	57
Budget Management.....	58

AVA SYSTEMS PTY LTD

© 2002 All rights reserved
 Level 2, 11-15 Falcon Street, Crows Nest NSW Australia 2065
 Tel: +61 2 9906 3505 • Fax: +61 2 9906 4424 • Eml: sales@avasystems.com.au
www.avasystems.com.au

Efficiency Global Features

This summary of the Efficiency software's common features, functions, set-up options, windows and should be used in conjunction with the appropriate Module Set-up manual setting-up a particular module.

The windows displayed in this manual are based on examples from the Product Module. These same windows will be present in the other modules with the relevant module name in the title of the window.

Start up Efficiency

The Login window below always greets the User regardless of the security system in use.

The "User id" will display the Id of the last person that logged in to that Client PC. You may change it to your own Id. Each user must enter a "Password." Ensure the password takes lower and upper case into consideration when entered, as passwords are case sensitive.

After the 'verifying User' message, "Connecting to Database" will be displayed. The Login process may take up to 30 seconds depending on the Security System.

If the password is incorrect or the user has no system access rights, a suitable message will be displayed in a dialogue box.

A single User can be logged in only once at any one time. If the Efficiency session has ended with an improper 'Exit' procedure (i.e. PC crash, or reboot), the system security will warn the user with a 'The User is Already Logged in' message. The only way to login with the same user id is by re-setting the user's login profile through the Supervisor Utilities.

Start-up Options

Efficiency users can set-up various 'Start-up' functions. These are set-up by individual users as explained later in this document:

- Automatic Module Load
- Sayings and Quotes

The result of selected functions is seen after a successful "Login".

Efficiency Menu System

Efficiency menu system consists of 4 main elements:

- System Menu
- Tool Bars
- Pop-up Menus
- Attachments Bars

The System Menu and Tool Bars operate together and the supervisor assigns them to user groups.

The Pop-up menus and attachments bars operate together. The supervisor assigns them to user groups also.

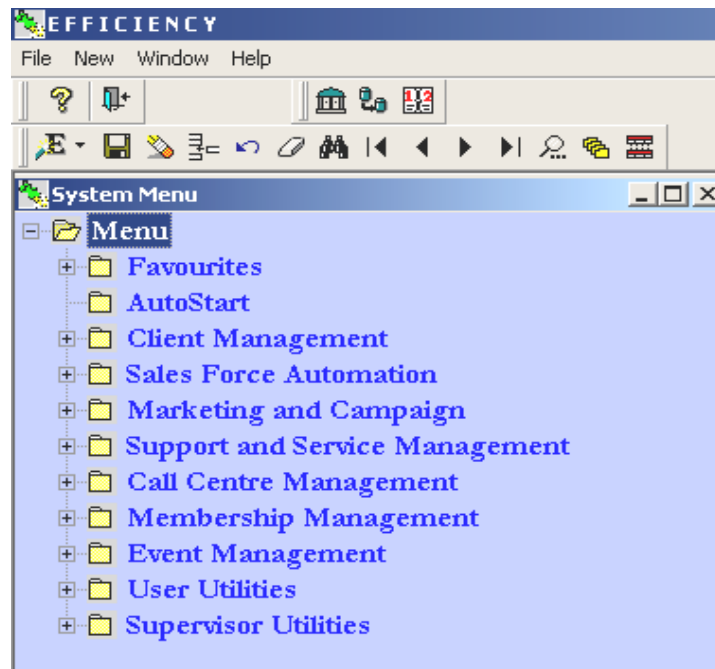
Each user's login profile belongs to a System Menu user group and a Pop-up Menu user group.

Both the Supervisor and User can customise each user group menu by:

- Efficiency Licence Access Code will display only the licensed modules.
- Each menu group or item is removable from user group menus.
- Each menu line item can carry privileges for the these functions:
 - Search
 - Insert
 - Update
 - Delete
 - Print

System Menu

Efficiency's System Menu is presented on a standard window Browser (Tree View) format.



The System Menu window can't be closed. It can be maximised or minimised and accessed as any other window by selecting from the Window pull down menu or clicking on the header section of the menu

sheet.

System Menu Components

The System Menu is always associated with a set of Tool Bars and a Pop-up menu to designed to maintain and customised the system menu itself.

Based on the Efficiency Licence the system menu displays all or some of the Efficiency Packages as the Menu Headers.

User cannot change the content of the Packages.

The User maintains the Favourites and the AutoStart sections.

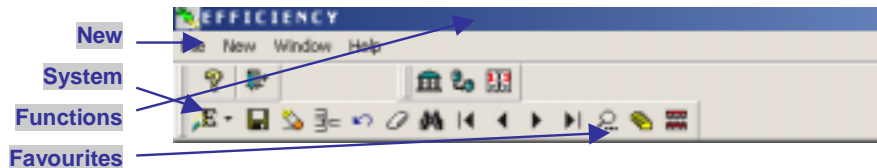
Toolbars

The Toolbar system contains icons that allow easy access to the windows or standard functions within them.

Toolbars are part of the system menu and changes dynamically based on user privileges and preferences as well as the type and function requirements of the open window sheet.

There are 3 toolbars.

1. System Toolbar
2. The Favourites Toolbar
3. The Functions Toolbar including the 'New' Pull-down Icon bar.



System Toolbar

This toolbar contains two icons for these functions:

- Context Sensitive Help, and
- Exit.

Favourites Toolbar

As the user customises menu items to the System Menu's Favourites section, related icons are added to or removed from the Favourites Toolbar.

The user can change the icons.

Functions Toolbar

This toolbar contains two sets of icons:

1. Record handling icons such as save, delete, and filter.
2. New Function Icons to enter a new record in selected modules or compose a new e-mail or SMS messaging.

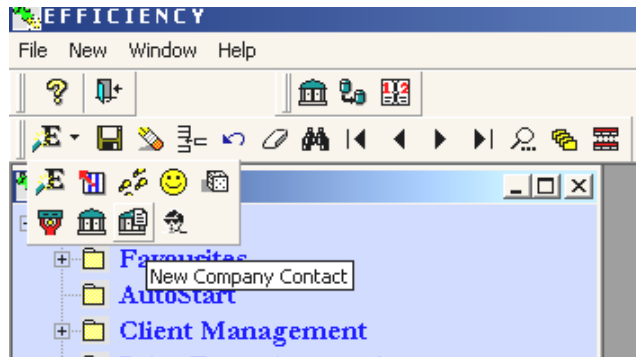
'New' Icons

This is a set of icons grouped on a Drop Down icon box.

The Efficiency Licence automatically sets this box's content.

Within the licence limitations user can select which icons to include in the set at the Global Section of the User Options utility.

The icon for the most recent selection is retained on the toolbar next to the down arrow.



These functions are assigned to the icons in this box:

Function	Options
Email	Uses the available email from the active sheet window or starts a new email session.
SMS	Uses the available mobile phone number from the active sheet window or starts a new SMS session.
Activity	Creates a new activity using the required data from the open sheet window. The activity won't be created if the data is unavailable.
Order	Creates a new Sales Order for the available company data from the active sheet window. Otherwise opens the Order Module tab for users to create a new order.
Quotation	Creates a new Quotation for the available company data from the active sheet window. Otherwise opens the Quotation Module tab for users to create a new quotation.
Service	Creates a new Service-Support Log for the available company data from the active sheet window. Otherwise opens the Service Module tab for users to create a new Log.
Company	Opens the Company Module.
Employee	Opens the Company Contact (Employee) window to add a new contact for the company record if the company data is available on the active sheet window.
Contact	Opens the Contact Module

Toolbar Maintenance Each sets of toolbars belongs to a sheet window. The User can define the location and options of each toolbar and window.

Use of the same location and number of toolbars for all windows is recommended; otherwise, access to each window may cause flickering on the desktop.

The User can control these options:

- Display of the toolbar and its location.
- Show Text on the icons (Large Icons)
- Show Power Tips

- Make the toolbar moveable

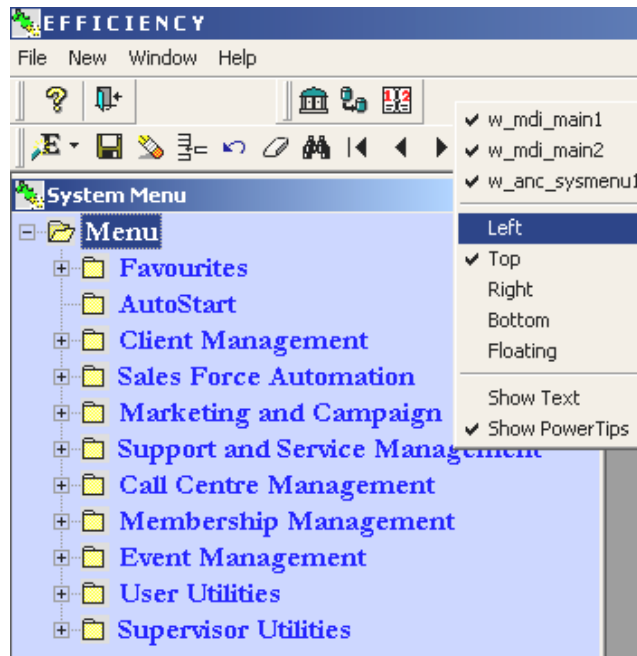
If it's a moveable toolbar, holding the edge of it with the left mouse button, will enable it to be dragged and dropped on any side (top, bottom, right, left) or at the middle (floating) of the desktop.

There are two options to access the toolbar maintenance utility.

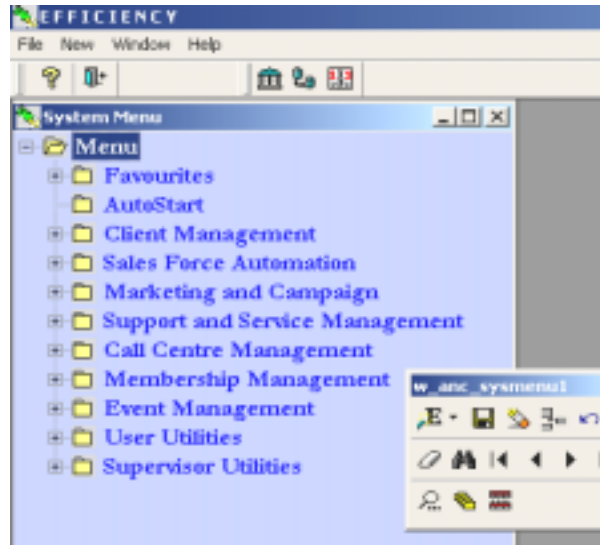
Select the Toolbars option from the Window Pull Down window.



Right mouse click on the toolbars.



For example, when the Floating option is selected for the Functions toolbar of an active sheet window, this toolbar will be displayed in the 'Floating' mode at the last location when that window is activated.

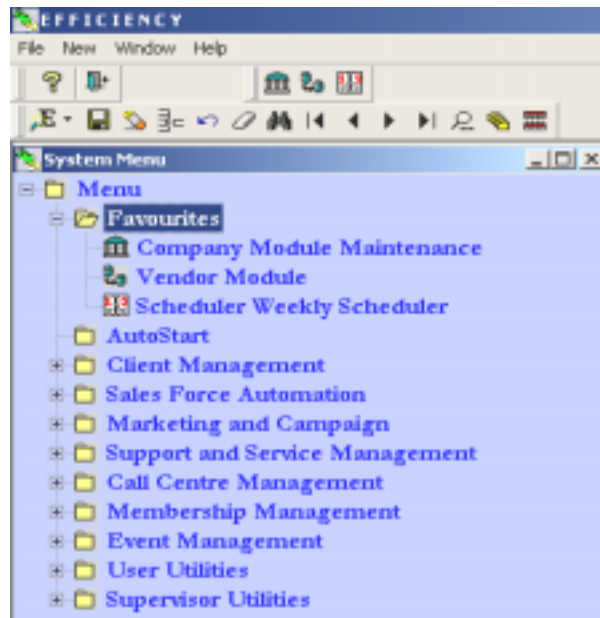


Favourites

The user can build up (simplify) his or her menu system by dragging and dropping the selected menu item on (under) the Favourites section of the system menu.

To remove an item from Favourites, simply right mouse click over the item and select remove from the pop-up menu.

The adding and removing of the item to the Favourites menu will automatically add or remove related icon to the Favourites Toolbar.



The contents of the Favourites menu and the toolbar are maintained for each user.

Auto Start Menu

If you want to start modules or windows automatically following a successful login, these menu items can be dragged and dropped in (under) the AutoStart section of the system menu.

To remove any item from the AutoStart, click the right mouse button of the mouse on the item to be removed and select the 'Remove' option from the pop-up menu.

Package Menus

The Package Menus (Headers) group the related Efficiency Modules.

The following Packages are available based on the licence:

- Client Management (CRM plus)
- Sales Force Automation
- Marketing and Campaign
- Support and Service Management
- Call Centre Management
- Membership Management
- Event Management

The User and Supervisor Utilities are always available on the system menu.

Module Menus

Each Package menu holds the relevant module menus.

Packages**Modules****Client Management**

- Company Management
- Contact Management
- Activity Management
- Executive Management
- Fixed Registers

Sales Force Automation

- Product Management
- Quotation Management
- Sales Orders
- Vendor Management

Marketing and Campaign

- Campaign Management
- Mail Desk
- Document Management

Support and Service Management

- Support Desk Management
- Contract Management
- Plant Management

Call Centre Management

- Call Centre

Membership Management

- Membership Management

Event Management

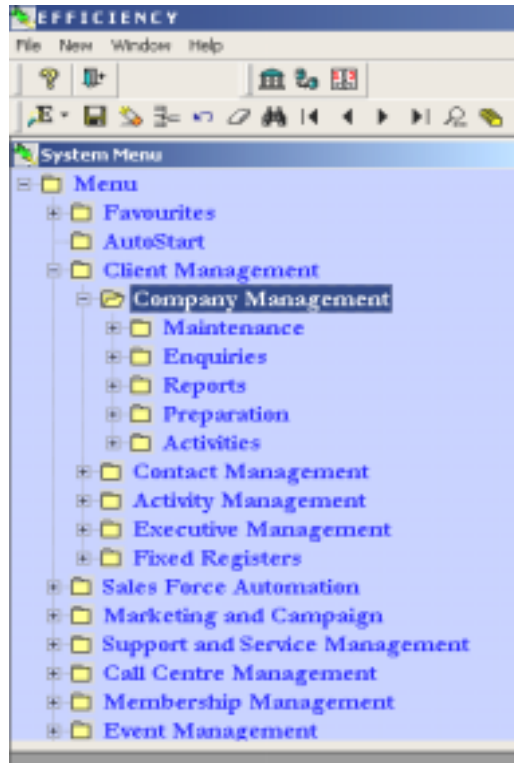
- Event Management

User Utilities

- User Utilities

Supervisor Utilities

- System
- Operations
- Security
- Users
- Data



Module Functions Menus

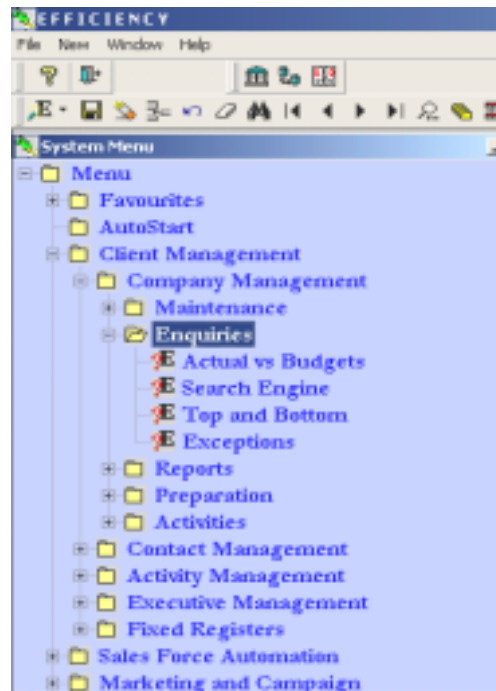
Each Module Menu expands to the module functions menus that hold various module functions (menu items).

The functions menu typically displays the group of:

- Maintenance
- Enquiries
- Reports
- Preparation
- Activities

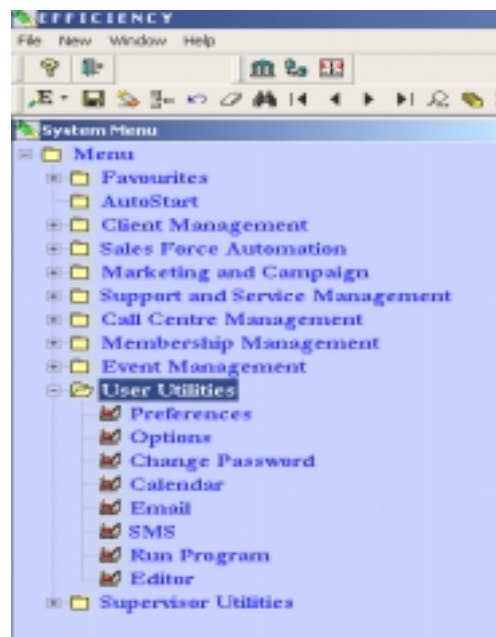
Double click on any function menu to expand the menu items

For example the Company – Enquiries menu will expand to display the following menu items.



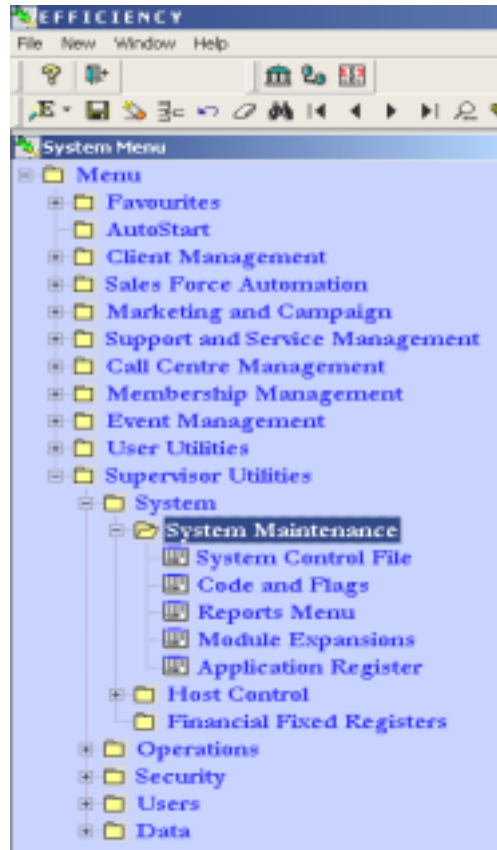
User Utilities

The User Utilities expands to the following menu items:



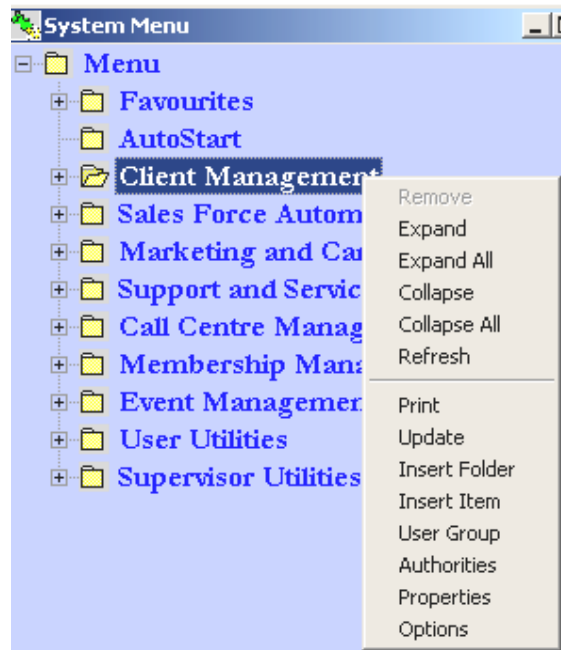
Supervisor Utilities

Further details on Supervisor Utilities are in the Supervisor Manual.



System Menu User Preferences

User can customise the appearance of the menu using the options on the Options item of the pop-up menu.



User Preferences Options

The changes will be common to all members in the user group.

The favourites icons will be at the user level.

Menu Colour:

Double click on this field to activate the colour selector for the menu

background.

Font:

Select a font for the menu text.

Text Colour:

Double click on this field to activate the colour selector for the menu text.

Font Size:

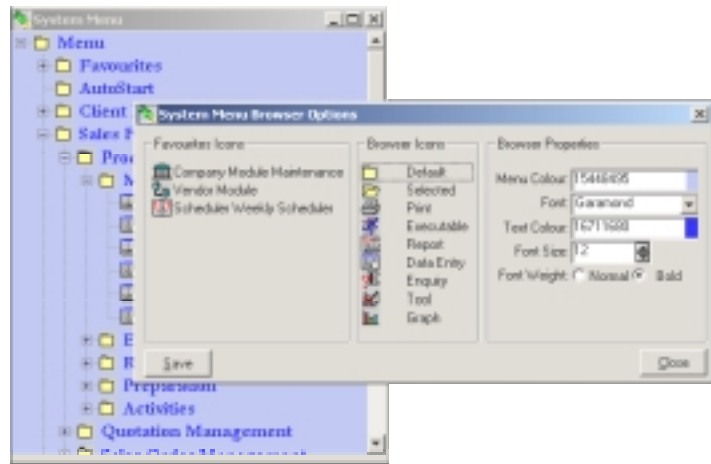
Select a font size for the menu text.

Font Wight:

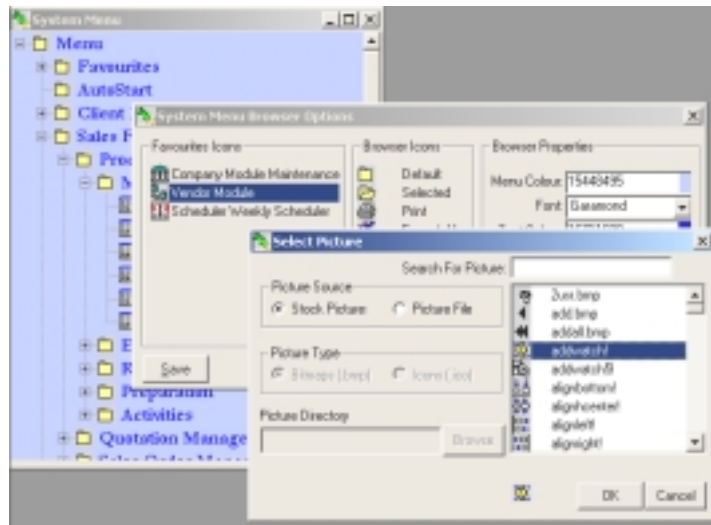
Select a font weight (normal or bold) for the menu text

Icons:

Double click on the Favourites or Browser Icon to change it



Icon and Bitmap selection



On return to the system menu select the Refresh option on the pop-up menu to apply the new selections.

Pop-up Menu System

The Pop-up or Floating Menu is one of the quickest ways of accessing the related sections and functions of Efficiency depending on where the program focus is.

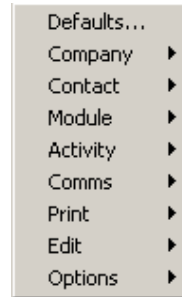
All the major data windows on the windows have Pop-up Menus.

To activate a Pop-up Menu you may use of one of the following three

options when the relevant data window had the focus.

- Press Alt + F1 function key.
- Click right button of the mouse
- Select pop-up Menu option from the Records Pull Down Menu of the master menu. (This option is available only for the MDI sheets)

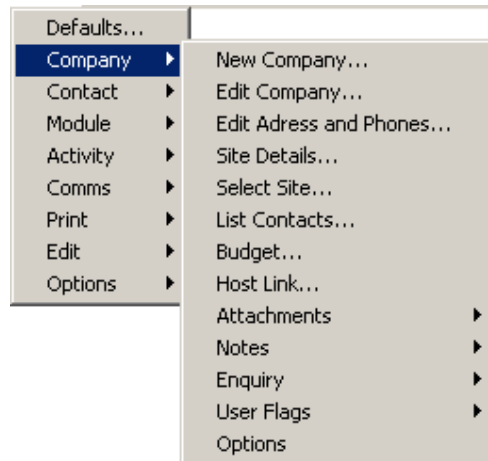
This is a typical multi level Pop-up Menu which can be activated from any Activity Transaction selection module:



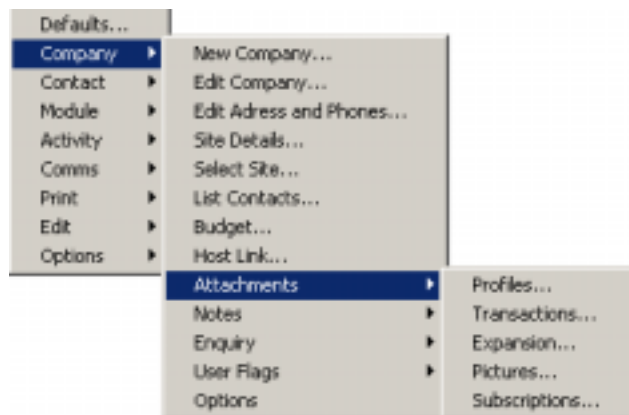
The content of each pop-up menu is dictated by the:

- Efficiency Licence
- User Group the user belongs to
- The data on the window that initiated the pop-up menu

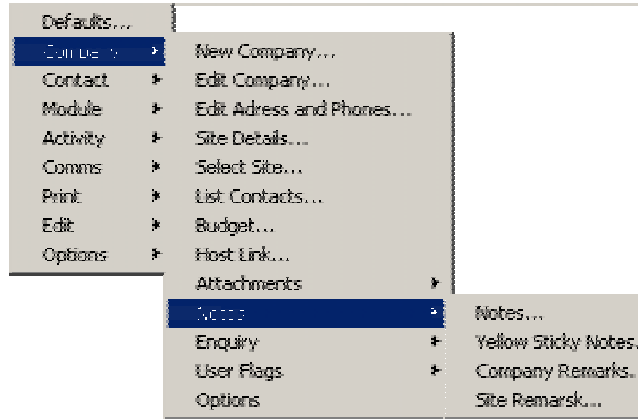
Company Pop-up Menu



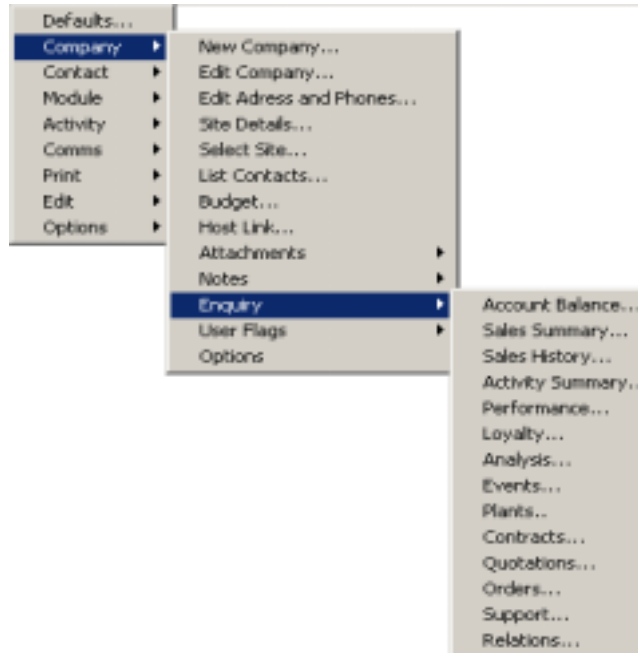
Company Attachments Pop-up Menu



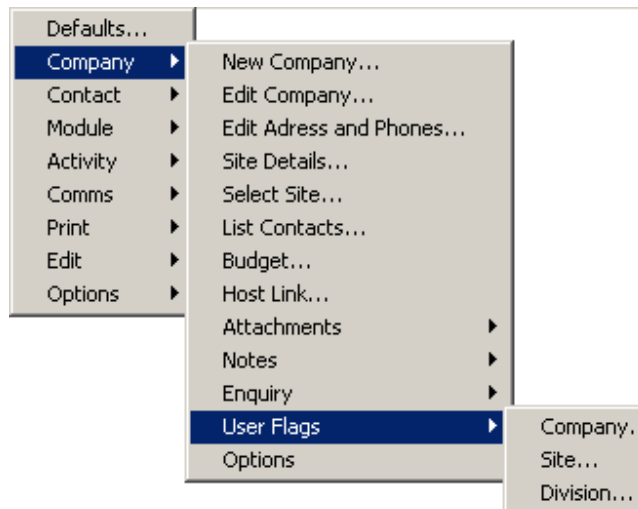
Company Notes Pop-up Menu



Company Enquiry Pop-up Menu



Company User Flags Pop-up Menu



Company Options Pop-up Menu

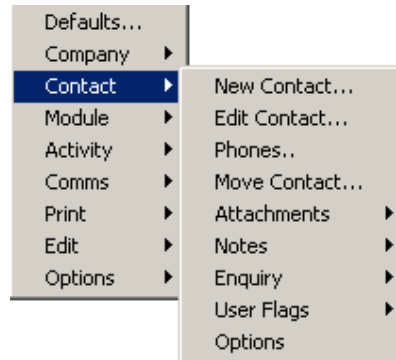
The Company Options Pop-up menu can be populated site-specific company related functions.

Contact Pop-up Menu

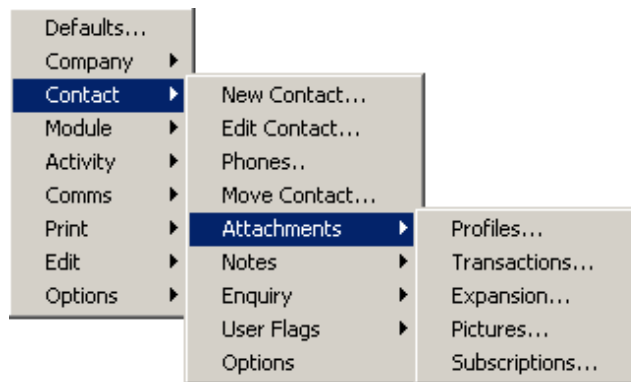
Contact Pop-up Menu can hold the menu items that initiates Company Contact (Employee) or Contact (Person) related items. System will

automatically sets the functions based on the data on the window that initiated the pop-up menu.

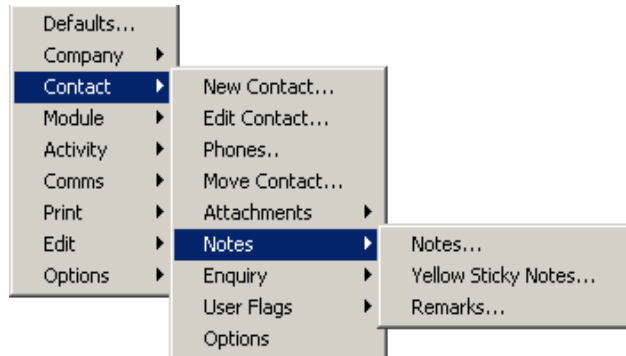
For example if the pop-up menu is initiated from the Support Log window, these menu items will relate to the company contact (employee).



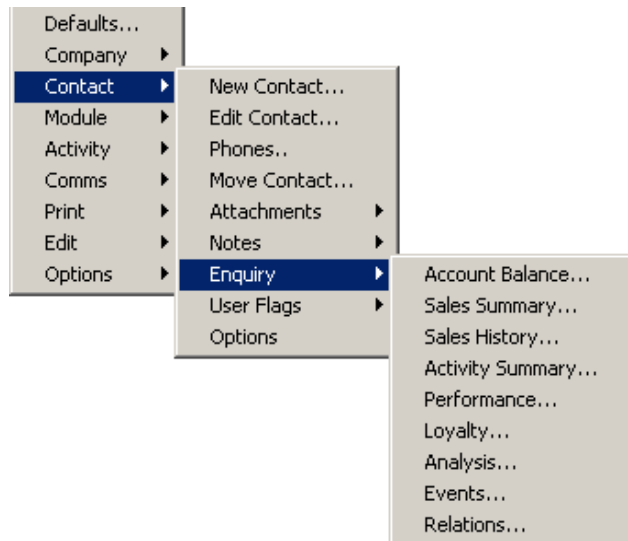
Contact Attachments Pop-up Menu



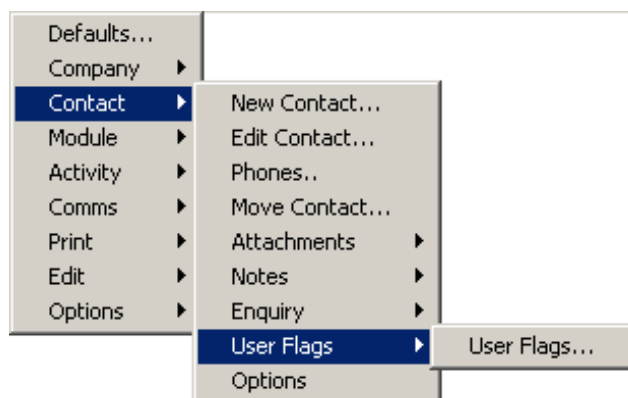
Contact Notes Pop-up Menu



Contact Enquiry Pop-up Menu



Contact User Flags Pop-up Menu



Contact Options Pop-up Menu

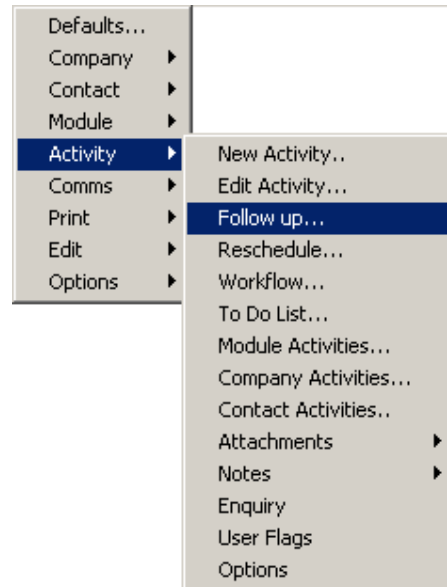
The Contact Options Pop-up menu can be populated site-specific contact related functions.

Activity Pop-up Menu

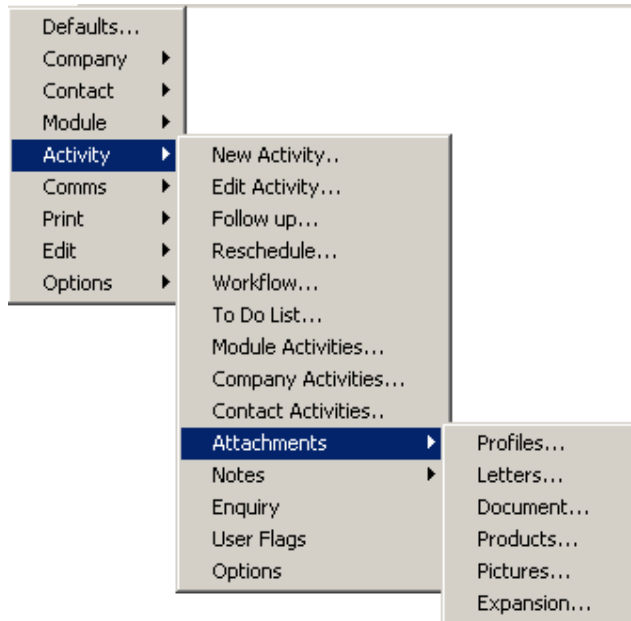
The Activity Pop-up Menu is dynamically formatted based on the data on the window that initiated the Pop-up menu.

This Pop-up menu will hold the menu items that directly relate to the activity record as well as the module, company and contact activities.

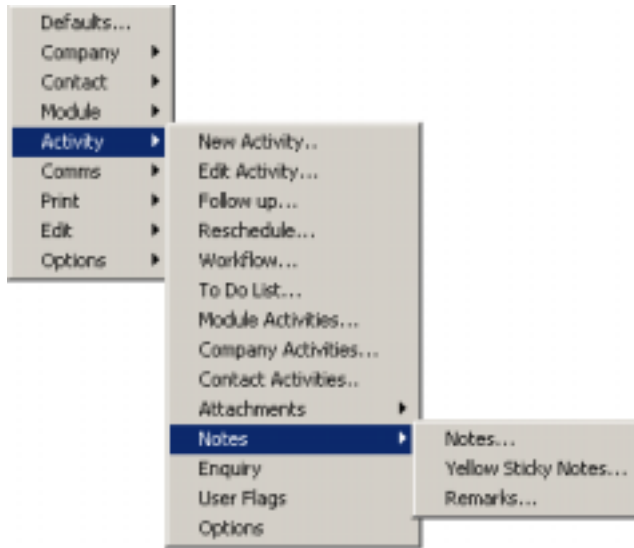
The Module related To Do and Work Flow is accessed from this pop-up menu.



**Activity Attachments
Pop-up Menu**



Activity Notes Pop-up Menu



Activity Enquiry, User Flags and Options Menus

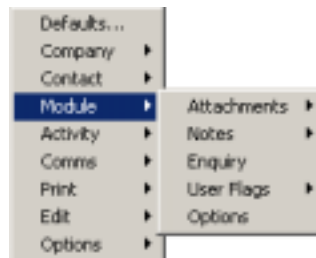
Activity Enquiry, User Flags and Option menus are populated with the menu items specific for the site conditions and requirements.

Module Pop-up Menu

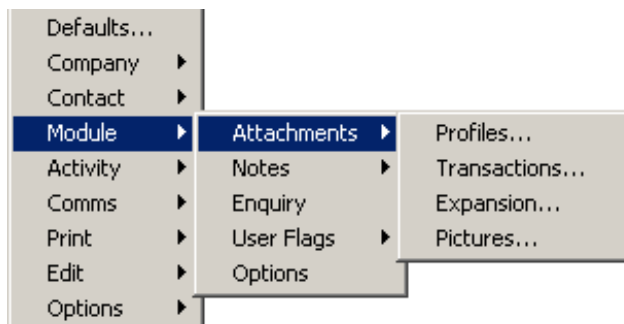
The Module Pop-up Menu is dynamically formatted based on the data on the window that initiated the pop-up menu. The name of the module i.e. Contact, Quotation, Plant etc will replace the 'Module' label

This pop-up menu will hold the menu items that directly relate to the specific module record.

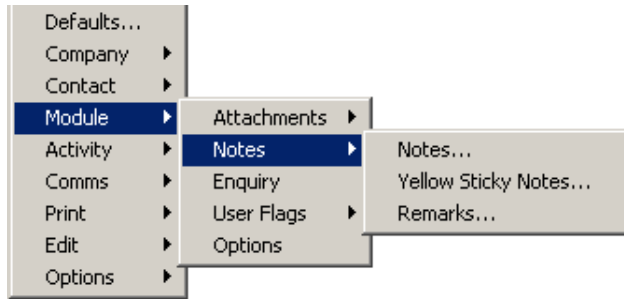
The Module related To Do and Work Flow are accessed from the pop-up menu's Activity section.



Module Attachments Pop-up Menu

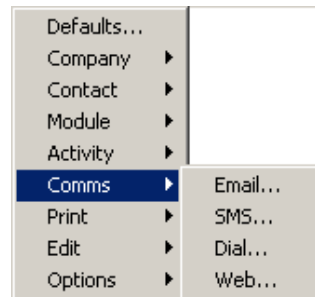


Module Notes Pop-up Menu



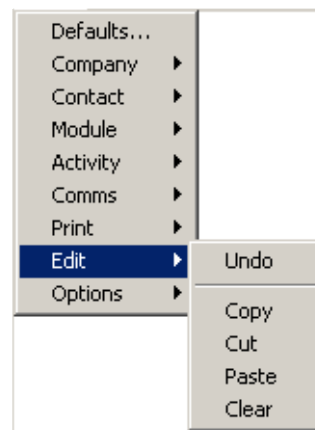
Comms Pop-up Menu

Email, SMS, Autodial and Web access functions are listed on this menu.



Edit Pop-up Menu

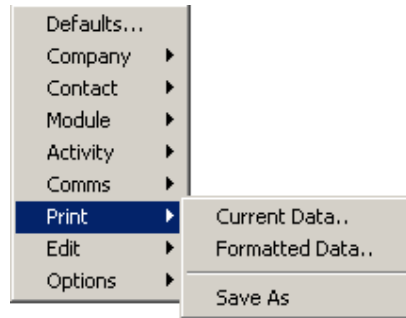
Standard window edit short keys are disabled in some areas of Efficiency and a set of edit options such as cut, copy and paste are provided as part of the pop-up menu.



Print Pop-up Menu

The print section of the pop-up menu has the following options if applicable to the initiating data object.

- Print Current Data** Prints the data on the data object with the focus.
- Print Formatted Data** Prints a formatted report that may be available for the window.
- Save As** Activates the Save As dialogue box to save data on the data object into one of many available file formats.



Attachments Bars

Most Efficiency modules and enquiry windows are fitted with an Attachments Bar.

An attachment bar is a set of icons that indicate the presence of attached data to the selected module master record as well as accessing windows to attach or remove data.





















Depending on the windows layout, the attachments bar can be presented at the windows edge in horizontal or vertical position.

Corresponding icons are dimmed when there is no attached records. Coloured icons indicate there is data attached to the master record for represented the function.

The supervisor can select up to 15 of 26 icons for each user at the Global Section of the User Options.

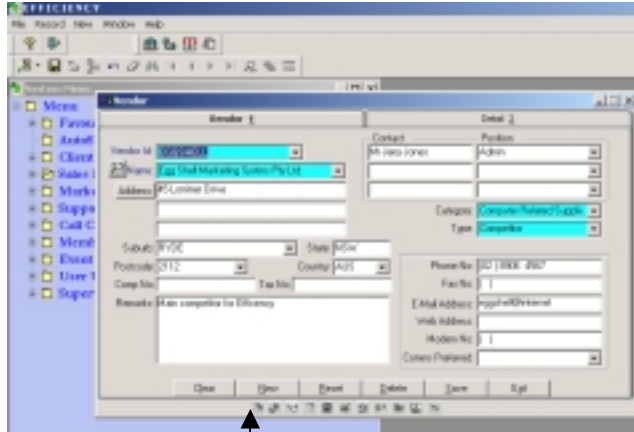
The selected icon set is for the entire system i.e. it is not module specific. Therefore, some icons (if there is no corresponding function) will respond only with a message when clicked.

Attachment Options

<u>Picture</u>	<u>Key Word</u>	<u>Description</u>
	AB	Account Balance
	AC	Activities
	AS	Activity Summary
	DR	Drill Down
	EV	Events
	EX	Expansions
	FU	Follow Ups
	HL	Host Link
	LE	Letters
	LO	Loyalty Points
	NO	Notes
	PE	Performance
	PI	Pictures
	PL	Plant Register
	PR	Profiles
	RL	Relations
	SB	Subscriptions
	SC	Contracts
	SE	Support and Service
	SH	Sales History

	SS	Sales Summary
	TD	To Dos
	TR	Transactions
	TY	Type
	WF	Work Flow
	YS	Yellow Sticky Notes

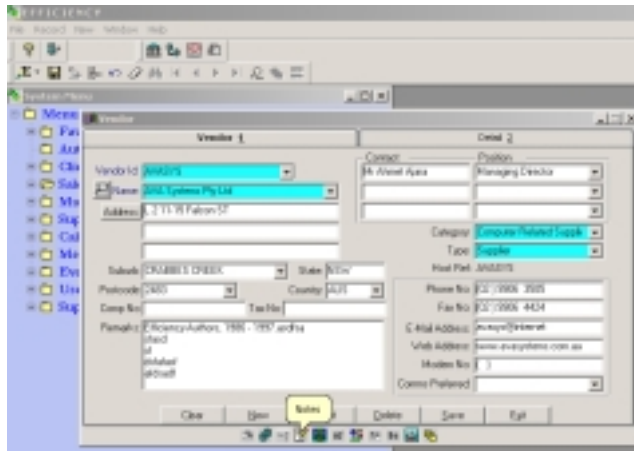
A Typical Attachments Bar



This Attachments Bar is dimmed, as there are no attached records to this master record.

Another record displays some coloured icons indicating there is attached data.

Notice the bubble power tip to indicate the type of icon.

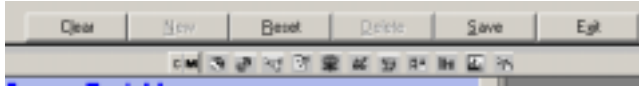


Combined Attachments Bar

In some cases, the data on the focus relates to a client (Company or Contact) and to a module (Quotation, Order etc).

In this case, two small buttons C=Client and M=Module are attached to the Attachments Bar. A bold letter represents the type of the bar, e.g. the Attachments Bar below is showing module related icons.

To switch to client related icons click on the 'C'. As the 'C' changes in bold the icons will be switched to the client's set.



Sayings

Efficiency is provided with few thousands of selected quotes from many well-known people. There is also a bit of humour. Later versions of Efficiency will include various "Operational Tips." The sayings are categorised as:

- Humour
- Business
- Life Style
- Miscellaneous
- Efficiency

A pop-up image will display a randomly selected saying after successful login if the User Preference is set to display them.

Data Entry and Maintenance

The data entry (or data maintenance) function in Efficiency is used for creating, editing, and deleting information. (Depending on the User access rights and the system security Set-up) from the Efficiency database tables.

There are 7 types of data maintenance. These are:

- Code Table Enter
- Category and Code Table Enter
- Select Enter
- Query-Select Enter
- Pick Enter
- Dialogue Enter
- Module Enter

The data entry and maintenance functions are usually composed of the following items. Command button can activate each function by clicking on the related icon.

New Record

This function performs these steps:

1. Clear the window
2. Move the cursor to the Primary Key field (Code or ID) i.e. Company Id, Quotation Id etc
3. If the table was set to <Automatic Id Creation> mode, get the next available Id from the system and display it
4. Ready to accept the new data in the columns (fields).

Reset

This is an optional function. When used during a new data entry, it clears the window. If system has already created a New Id, this ID (Number) will be wasted.

If the function is used during data maintenance, all the column values will be reverted to the original (table) values.

Save Record

After completing the data entry, this function performs these steps:

1. Check the data being entered in the <Required> fields
2. Check if the Primary Key of the new record if it is duplicated
3. Check data integrity and the Foreign Key relations.

4. If all of the above are validated then save the values in to the table

The majority of the application and the database messages that may be displayed to the user relate to data integrity or system request for a more complete and correct data entry.

The supervisor at the database level for a user or a user group may enable this function.

Delete Record

This function removes the data from the database. The delete function is performed if the following criteria is met:

The user has given the "Delete" rights at the database level.

The intention to delete is confirmed on the dialogue box.

The value is to be deleted has not been used in any part of the database as part of a "Foreign Key

If the above criteria aren't met, the user will be informed with a suitable system message.

Once the deletion is validated, user must activate the "Save" function to apply the deletion process to the database.

Soft Delete

If any Efficiency database table was set to the <**Delete Request**> mode by the supervisor, the "Delete" function will not be able to delete the record from the table. Instead, it performs the following steps:

1. Mark the record as the "Delete has been Requested". And enter the reasons for the delete request in the dialogue box provided
2. During the subsequent presentation of this data to the user, the portion of the data will be displayed in "Red." These records should not be used in the application.
3. System supervisor will use the "Clean up Utility for the Delete Requests" function to delete these records and their descendants from the database or to revert the status back to active

Code Table Enter

The data is presented in a tabular format.

All data maintenance functions are achieved on this screen. This format is usually used to maintain the "System Code" tables.

These are usually grouped under the <Prepare Menu> item of each tab folder (Module) or available on the Pop-up menus

A "System Code" record is usually made up of a Code and the Description fields.

The following "Product Status" window is a typical example for the 'Code Table Enter'.

Id	Description
00000	Default Stock Status
A	Active
D	Deleted Stock Item
N	Non Stock Item
O	Obsolete
P	Production Item
S	Stock item

Category and Code Table Enter

This is a tabular form data entry.

These are usually grouped under the <Prepare Menu> item of each tab folder (Module) or available on the Pop-up (floating) menus

The Codes and their Groups are maintained on two level windows. Usually the top window is used for the Group Codes and the bottom window is used for the Item Codes.

The Product Price Groups maintenance image is a typical example.

Id	Description
00000	Default Major Price Group
DEALER	Dealer Price
EDUCATE	Education

Id	Description
DEAL_DIST	Dealer Distributor
DEAL_MRKT	Dealer Marketing Partner
DEAL_SALE	Dealer Sales Outlet

The command buttons on the bottom row are linked to the "Group" records. They are used to maintain the "Group" records.

The <Add> and <Remove> command buttons are used for the "Item" codes.

If the "Delete" function on a "Group" record was performed, all the related "Codes or Items" will also be deleted. The "Delete Request" for a "Group" record will not be reflected on the related "Code or Item" records.

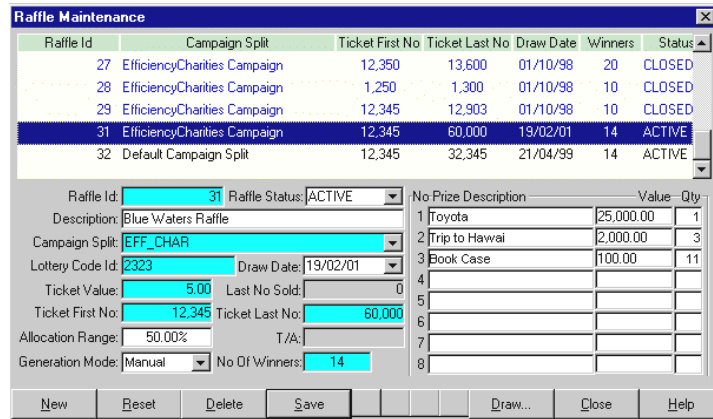
Select Enter

This type data entry is presented in split (two) windows

The first window displays all the available records as a <selection list>.

As the user scrolls through the list the <details> of the record is displayed on the second window. The data maintenance is done on the second window.

The following “Raffle Maintenance” window is an example for the ‘Select-Enter’ type data maintenance.

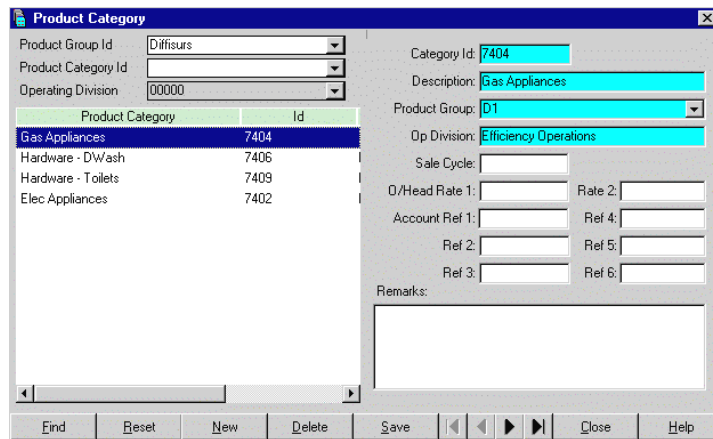


Query-Select Enter

This is also referred as the “Complex data Entry.”

The <Query>, <Select> and <Enter> functions are all performed on a single window image.

Usually the record to be maintained is made up of various data segments. For example, a Product Category code can be maintained separately for each operating division of an organisation



The top left section is used for the <Query>.

The section just below it, the <Selection> section, is used to locate the required record from the list of filtered records based on the query criteria.

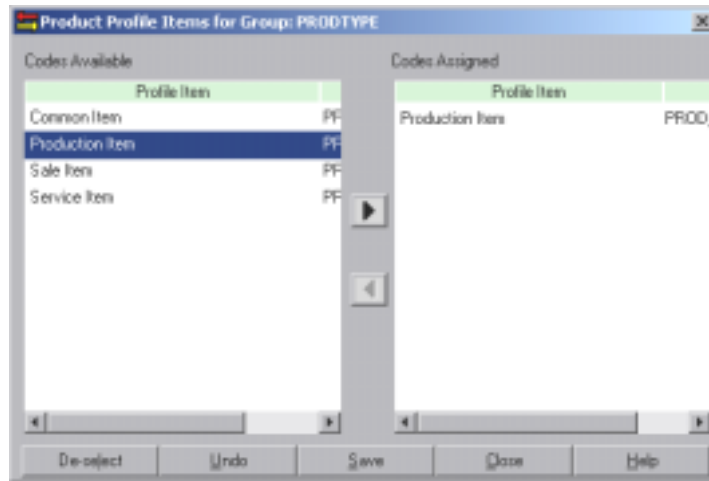
As the selection bar moves, the information of the highlighted record is displayed on the <Data Entry> screen, which is presented at the right half of the window.

Pick Enter

The attributes and profiles are the types of user-defined values, which are attached to a selected record. This is usually in Many-to-One format, i.e.

Many attributes to one record. A <Pick Enter> type data entry object usually maintains this function.

For Example, to attach Product Profiles to a Product record is achieved by using the following pop-up image.



How to Use

You can assign and un-assign items to a record on this window.

1. Select Item(s) on the <Available> list
2. Transfer them to the <Assigned> List
3. To remove the lines from the <Assigned> List, select items and the <Available> list transfer them back to
4. If you made an error, you can always click on the <Reset> or the <Undo> buttons

Dialogue Enter

This type of data entry is usually performed on a Dialogue Box, which is accessed through either a Pop-up Menu or a command button.

The following "Building Maintenance" dialogue box is a typical example:

Module Enter

The master file (Module) records and details are usually maintained on the Module Tab Folders. The details or the sections of the related data are also maintained at and during of the related operations.

For example, all the related Product details can be maintained on the Product Tab Folder.

The screenshot shows a 'Product' window with the following details:

- Product 1: Detail 2, Price 3, History 4
- Product Id: P222 (dropdown)
- Status: Active (dropdown)
- Description: Dome 222 mm Polycarbonate (dropdown)
- Category: Diffusers 200 (dropdown)
- Recommended List Price: 110.00
- Date: 11/09/00
- Tax Rate: 10.00
- Op Division: Efficiency Operations
- Stock Unit: EACH
- Sell Unit: EACH
- Sell Volume: 1,0000
- Host Reference: P222
- Remarks: (empty text area)
- Checkboxes: BDM Allowed (checked), Configurator Header (unchecked), Plant Create (checked), Not for Sale (unchecked), Remote Access Allowed (checked)
- Buttons: Search, Clear, New, Reset, Delete, Save, Exit, Help

Remarks and Notes

Three types of notes and remarks can be attached to each master module records.

- Standard Remarks
- Module Notes that are date stamped and secured
- Yellow Sticky Notes.

Remarks

Each module record and in many cases the sub records are provided with one or more remarks and notes fields.

The double click on the remarks field on any module window will zoom in to a large multi-line edit window.

The screenshot shows a 'Remarks for prod_remarks (Edit Mode)' window with the following details:

- Title: Remarks for prod_remarks (Edit Mode)
- Text: This product will be replaced by P222A after the 2000 stock take.
- Buttons: Print, Export, OK, Cancel

The notes on this window can be printed or saved as another file format.

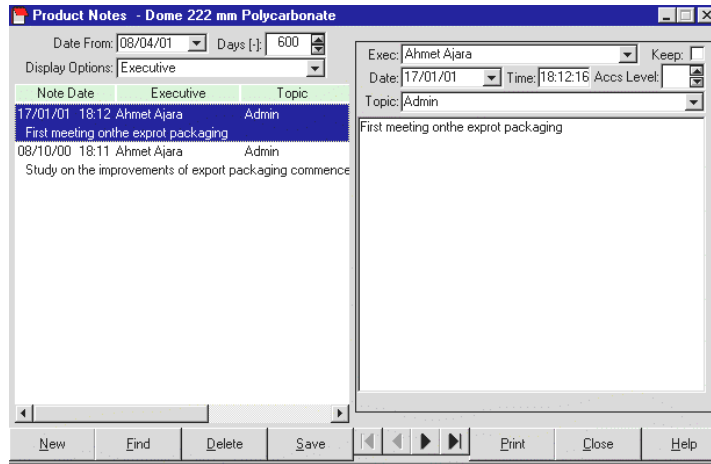
Once the OK button is clicked, the remarks entered in this window are appended to existing remarks on the main window.

Module Notes

Unlimited number of notes can be attached to each module record.

The Product Notes are maintained on this window. Within the module while in the record, the options are available on the main tool bar under Record and selecting Popup menu or right clicking on the product screen and selecting notes\attach notes.

An Example is shown as below:



Query and Display

Make the query selections at the left top section of the window. Click on the <Find> button. The list can be summarised using display options-By Executive, Date or Topic.

The right click pop-up Menu on the list section will allow the user to use the E-mail (if available), filter, print and sort functions.

Maintenance

Press the <New> Button to create a new Entry. The Note date, time, and Executive Id will populate automatically.

Enter the desired information and press <Save>. The Display window on the left will be updated.

Fields

Executive: The Id of the Executive entering the note. This defaults to the current log on executive but can be changed if required.

Note Date: The date of the note entry. Defaults to the current date but can be changed if required.

Note Time: The time of the note entry. Defaults to the current time but can be changed if required.

Access level: The access level assigned to the note (1-9). Users can assign notes above their current access level if required. A message <<INSUFFICIENT ACCESS RIGHTS>> is displayed for the note if the user access level is lower than the one on the note.

Keep: Checkbox to mark the record so that during note purging, this record will not be deleted.

Topic: Enter a Topic or select it from the pick list.

Yellow Sticky Notes

A set of Yellow Sticky Notes can be attached to each Module record.

Use the Pop-up menu by right clicking mouse button and select Notes, Attach yellow sticky note to access the Yellow Sticky Note Create and Edit Window.

Display

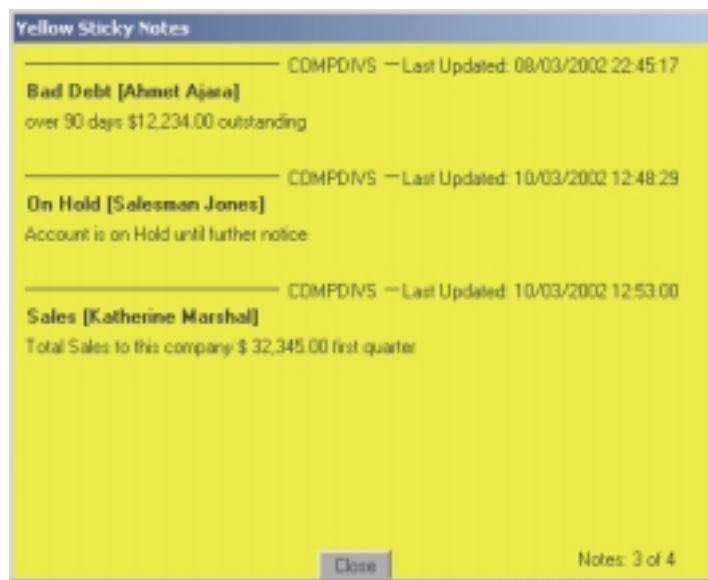
1. Any Auto pop-up yellow sticky notes attached to Company records will display automatically whenever the company related module record is accessed or any company record is selected in these modules:

- Quotation

- Sales Order
 - Plant Site
 - Contract
 - Support and Service
2. If the 'Auto Yellow Sticky Notes On Activity' item of the User Activity Option is set to 'Yes', the company and contact Auto pop-up yellow sticky notes will be displayed once related activity records are accessed or a new record is created.

If the 'Combine Yellow Sticky Notes' item on the User Global Option was set to 'Yes' the access to the yellow sticky note on the Quotation, Sales Orders, Plant Site, Contract and Support modules will display a combination of sticky notes from the module and company.

Otherwise, the Auto pop-up company notes will be displayed first and the Auto Pop-up module notes second.



A line on which the related module and the last update timestamp are displayed divides each yellow sticky notes record.

Just beneath the line the description and authorised person's name is printed.

The bottom-right side of the window, the number of displayed notes of the number of available notes is shown.

Maintenance

The select and enter type maintenance window is accessed from the pop-up menu of the related module.

Description	Authorised By	Valid Date	Active	Auto Popup
Bad Debt over 90 days \$12,234.00 outstanding	01	12/12/02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
On Hold Account is on Hold until further notice	03	12/12/02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Total Sales to this company \$ 32,345.00 first quarter	04	12/12/02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Description: Active:

Authorised By:

Valid Date To:

Auto Popup: Yes No

Fields

Description: Enter here the description (Header) for the notes.

Authorised By: Select the Executive from the pick list who prepared or authorised these notes.

Valid Date: Enter here the date up to which the notes will be valid. After this date, the notes automatically purge.

Auto Pop Up: Select the 'Yes' button if the notes are designed to pop-up automatically as soon as the attached record was retrieved.

Active: To Uncheck the active check box disables (not deleted) the notes.

Sticky Notes: The body of the notes to be displayed on a yellow background.

Security

Different Login executive from the 'Authorised by' Executive, cannot edit or delete the notes content.

You can set any record to Inactive by un-checking the Active check box. These records will not be displayed.

The Task Manager uses the valid time value during the bulk update process.

If the Auto Pop-up box is checked the yellow sticky note is always displayed as soon as the record was accessed

Automatic Update

A number of automatic update functions are available via the Task Manager and the database stored procedures. These functions can be set so underlying business rules will update yellow sticky notes as required.

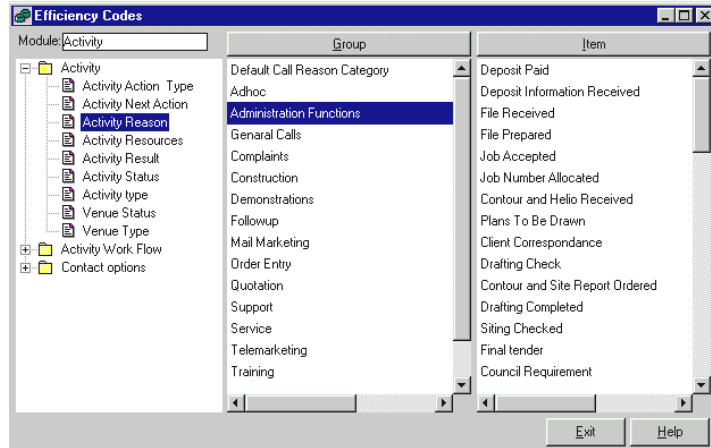
Codes and Flags

Efficiency System Codes and Flags maintenance user interface has been completely upgraded to include these features:

1. The Codes Maintenance now is a self-contained executable program that can only be initiated within Efficiency.
2. The interface is presented on a Tree View format without needing any further pop-up windows for the required functionality.

3. User can print the Category or Item lists or Save as to any supported formats.
4. User can select any modules to maintain its codes and flags.

If the Maintenance program is started from a module, it will start up with the selected module and its tree view. Other modules can be selected at any time.



The Group (Category) and Item list displays only when it is **double clicked** on the tree view item.

Click on the Group line to display the Items of the group.

At the display mode, you cannot maintain groups or the items. Click on the Group or Item Buttons at the top or double click on the line to display the data maintenance windows.

On the display windows right mouse click will allow the user to Sort, Filter or Print the lists. The Print option will have three separate functions.

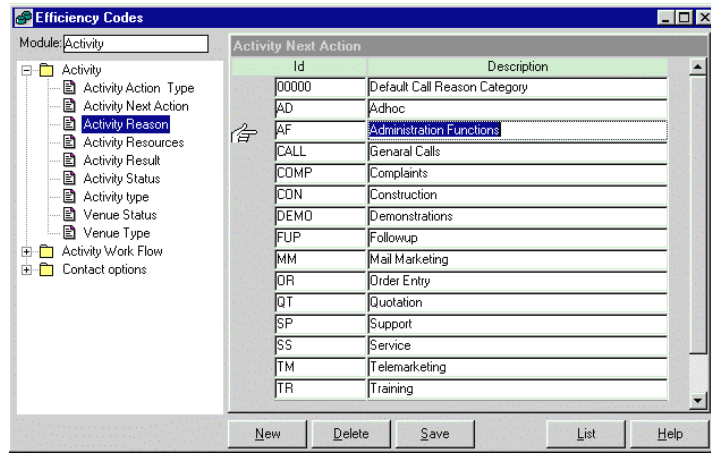
The system dependant items are displayed underlined.

Print Current Data: Prints the screen

Print Formatted Data: Print formatted reports listing the Group and Items.

Save As: Allows the user to save the current data in any supported file format.

The data maintenance window displays the data in the following format for group or item maintenance.



The New, Delete and Save buttons will perform the standard functions.

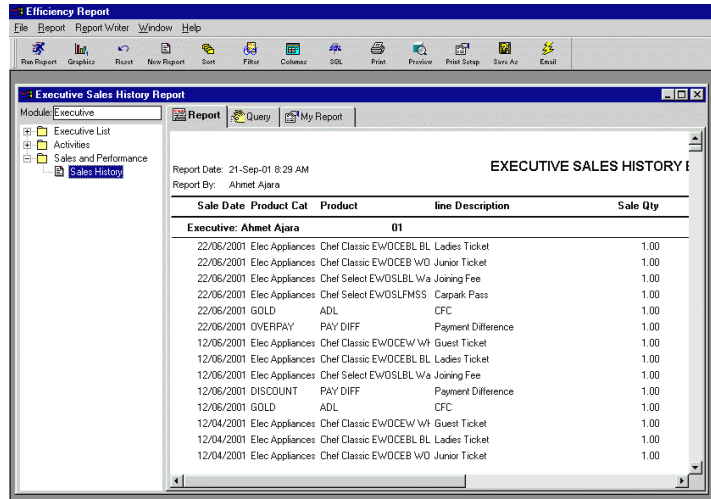
Click on the List button or double click on any line to return to the List display mode.

Standard Reports

Efficiency Standard Reports application features:

1. Module reports presented on tab sheet with a tree view selections.
2. The last tab, 'My report' holds all the saved previous report selection options for the selected report. Any one of these pre-saved reports can be nominated as default.
3. Standard right mouse click menu options display continuously on the tool bar.
4. Save As icon starts the extended save as dialogue box which allows the user to save the report in PDF format and all other standard file formats.
5. If the reports program is accessed within Efficiency, reports for that module are defaulted.
6. You can start as many report sheets as required by clicking on the New Report icon.
7. Upon completion of the selection, the Run icon must be clicked.

Efficiency Reports Run



The following is a typical report production:

1. Select Module
2. Select report item on the tree view and click on it

3. Enter Query or select an existing criteria from the My Reports sheet
4. Click on the Run Icon

If you want to save the report in any one of the supported files formats or Email click on the Save As icon.

Efficiency Reports Query

If there was a default selection criterion on the "My Reports" tab, the values of that selection are displayed on the query tab.

You can add more selection criteria or click on the Reset icon to reset the query.

Upon completion of the query entry, click on the Run icon to display the result report.

The SQL icon will display the WHERE clause generated by the entries on the query tab.

Check on the "Print This" icon to print the query window at the end of the report.

Checking on the summary check box will switch the summary report if it was available in the system.

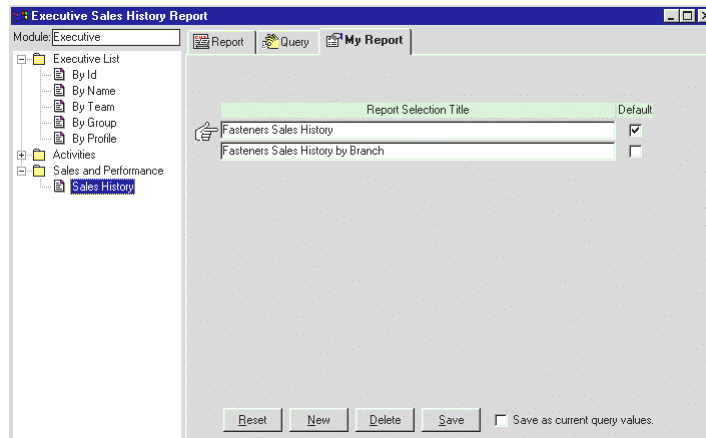
My Reports

This tab allows the user to save the query selection criteria and allocate any of them as the default selection.

Select the saved report selection and go to the Query Tab. The selected criteria will populate the query fields.

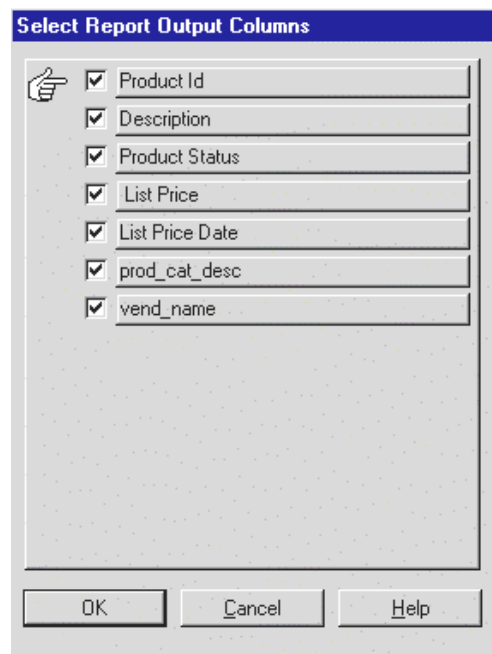
Click on the <New> button to enter a new selection definition. Enter a description and click on the save button. If you wish to save the current query values for this item, check the "Save as Current Query Values" box.

If you wish to make any item the default selection, click on the default check box before saving it.



Columns

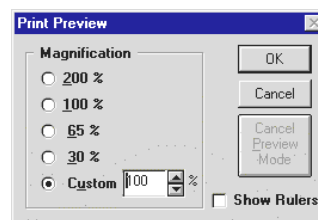
The Columns icon will present the user with the following window.



To remove any of the fields from the printed report simply click the checkbox next to the field name and click 'OK'.

The User will be returned to the Display Screen.

Zoom



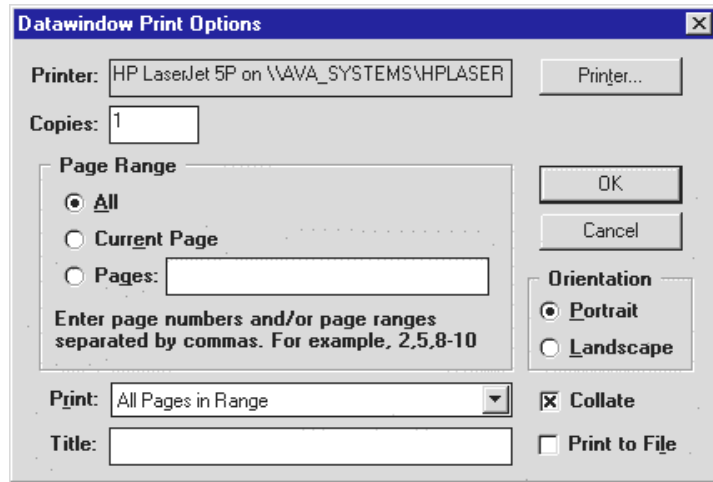
Select the magnification required and press <OK> to preview the report

The Sort and Filter functions are accessed from the pop-up menu by right clicking mouse button.

Print Function

The <Print> button will launch the standard Windows Print Dialogue box where printer selection and copies can be made before sending the job to the Printer.

the Printer.



Selecting Print from the right click menu option, or click on print button will give the user two options:

- **Current Data:** Performs the same function as the print Button
- **Save As:** Saves the rows of data in different file formats.

Sort Function

Sorting Rows

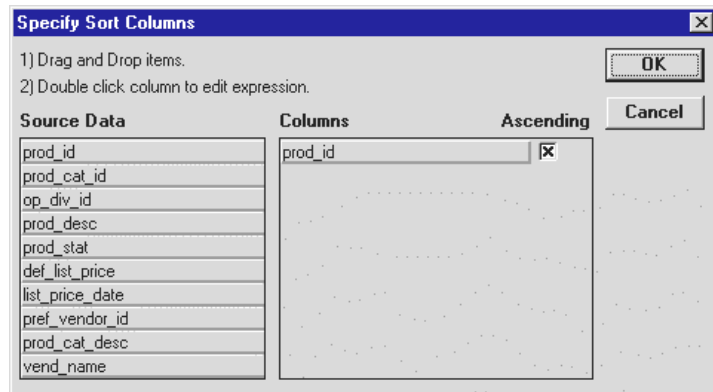
If you want to further sort the data within the enquiry and the report result windows during execution you can use the Sort function. This function is available on the Pop-up Menus.

Sort doesn't affect which rows are retrieved

To define a Sort

Select the Sort option from the Pop-up menu.

The Specify Sort Columns dialog box displays.



Drag the columns you want to sort on from the Source Data box to the Columns box.

A checkbox with an X in it displays under the Ascending heading to indicate that the values will be sorted in ascending order. To sort in descending order, uncheck the checkbox.

Precedence of sorting

The order by the columns display in the Columns box determines the precedence of sorting. For example, in the preceding dialog box, rows will be sorted by dept ID. Within dept ID, rows will be sorted by salary.

To change the precedence order, drag the column names in the Column

box to the order you want.

You can also specify expressions to sort on: for example, if you have two columns, Revenues and Expenses, you can sort on the expression Revenues-Expenses. To specify an expression to sort on, double-click an item in the Columns box.

The Modify Expression dialog box displays.

Specify the expression and click OK.

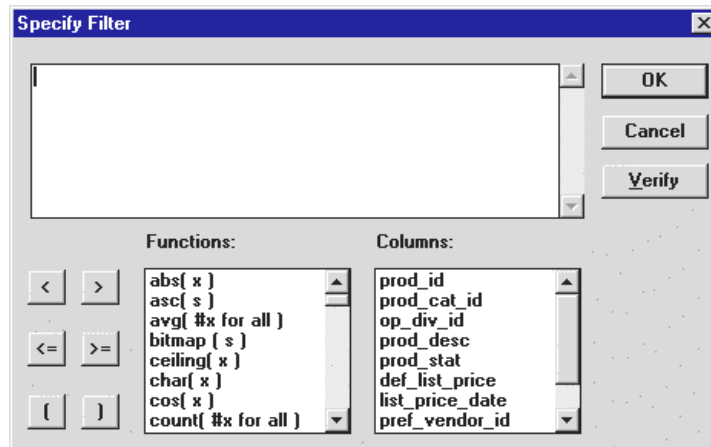
You return to the Specify Sort Columns dialog box with the expression displayed.

If you change your mind, you can remove a column or expression from the sorting specification by simply dragging it and releasing it outside the Columns box.

Filter Function

Filtering Rows

If you want to further limit the data that displays in the enquiry and the report result windows during execution you can use the Filter function. This function is available on the Pop-up Menus.



Filters don't affect which rows are retrieved

A filter operates against the retrieved data. It does not re-execute the SELECT statement.

To define a filter

Select the Filter option from the Pop-up menu.

The Specify Filter dialog box displays.

Enter a Boolean expression that Efficiency will test against each retrieved row. If the expression evaluates to TRUE, the row will be displayed. You can specify any valid expression in a filter. Filters can use any non-object-level functions. You can paste commonly used functions, names of columns, computed fields, retrieval arguments, and operators in to the fields.

Only rows meeting the filter criteria will be displayed.

International Considerations

So that an application will run the same no matter in which country it is deployed, filter expressions require U.S> notation for numbers. That is, comma always represents the thousands delimiter and period always represents the decimal place when you specify expressions in the

development environment.

Filtered Rows and Updates

Filtered rows update when you update the database.

To Remove a Filter

Select the Filter option from the Pop-up menu.

The Specify Filter dialog box displays showing the current filter.

Delete the filter expression, and then click OK.

Examples of Filters

Assume that a report displays executive. Three of the columns are Salary, Status, and Exec_LName.

The following filter displays only executives with salaries over \$50,000:

- Salary > 50000

The following filter displays only active executives:

- Status = 'A'

The following filter displays active executives with salaries over \$50,000:

- Salary > 50,000 AND Status = 'A'

The following filter displays executives whose last names begin with H:

- left (Exec_LName, 1) = 'H'

Save As

Save as function is extended to include the following features for most of the Efficiency main data entry windows and the enquiry and report list displays.

The main feature of the extended Save As is to save the data in PDF format and to save the data list in either PSR or PDF format just before invoking the E-mail function so that the data on the screen can be attached to the email automatically.

For all the other windows the standard Save As function is still available

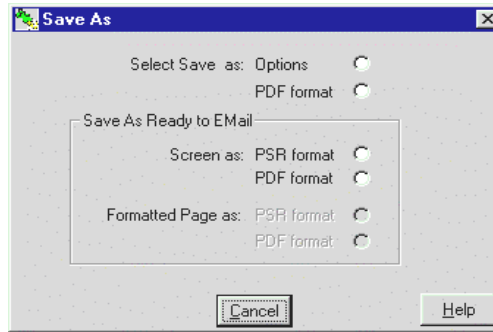
Select Save as Options: The standard Save As dialogue box will be displayed to select the required file format and directory path.

Select Save as PDF Format: From the print selection dialogue box the PDF printer must be selected

Save As Ready to Email Options

<u>Option</u>	<u>Action</u>
Screen as PSR format	Click the radio button to attach the screen output
Screen as PDF format	Click the radio button to attach the screen output
Formatted as PSR format	Click the radio button to attach the screen output
Formatted as PDF format	Click the radio button to attach the screen output

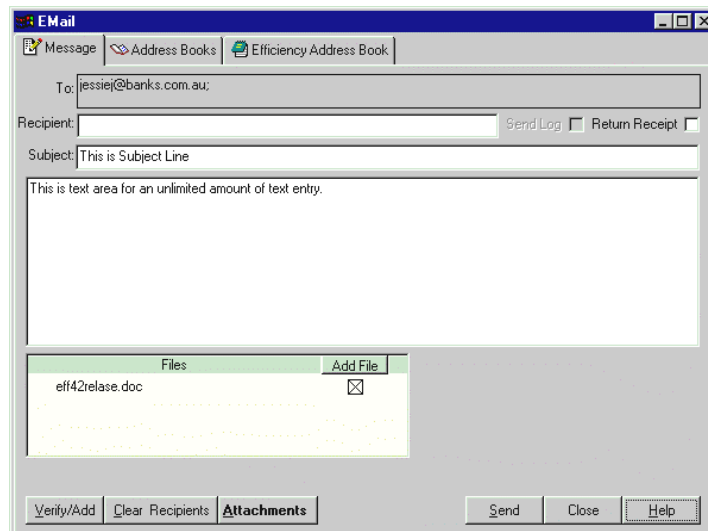
After completing the save as option if the Email was started the file will be automatically attached to the email message.



Email

Efficiency E-Mail user interface includes the following features.

1. The e-mail now is a self-contained executable program that can only be initiated within Efficiency.
2. The interface is presented on a Tab form without needing any further pop-up windows for the required functionality.
3. User can attach any file documents to the e-mail.
4. Standard Efficiency reports can be either in psr (PowerBuilder Stored Report) or in pdf format.
5. The E-mail address books, standard Efficiency or E-Mail system is accessed from the Tab page.
6. The system e-mail (MS Outlook/Exchange, Lotus Notes or GroupWise) is accessed from the same tab interface



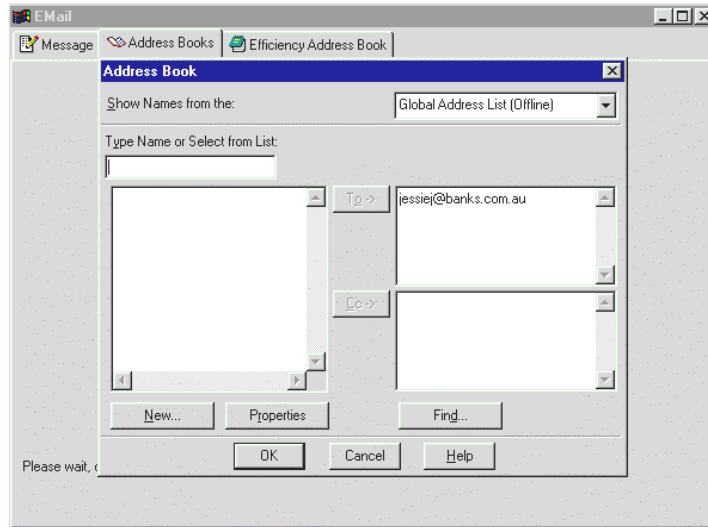
How to Attach Files

Click on the <Add File> button to select the attachment file(s) from the system directories. The check box against the file can be unchecked in which case it won't attach to the email.

Click on the <Attachment> button to hide or display the attached file lists.

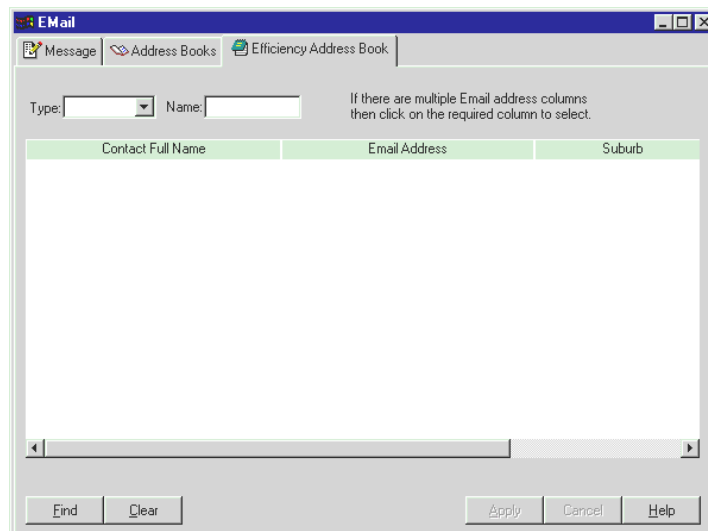
If E-mail is initiated by the list of recipients and or text these will be locked in automatically when the E-mail tab is displayed.

To select recipient(s) from the E-mail system's address book select the Address Books tab



In the picture below, the MS Outlook's address book is shown. The Notes and Group Wise options will display the corresponding address books.

If the e-mail address is to be selected from Efficiency's database click on the Efficiency Address Tab.



SMS Messaging

The SMS messages can be dispatched in two ways.

1. Direct from the PC via a modem attached to the serial port of the PC.
2. From the server via a modem attached to the serial port of the server using the SMS Dispatch function in the Efficiency Task Manager.

Notes: Please ensure the IDD codes in the country table is most up to date as SMS carriers require these codes at the beginning of the actual mobile phone numbers.

The supervisors will set-up the SMS messaging system for the user.

How to Send SMS Message?

If you wish to send the SMS message to a person whenever this person's record was on the screen right mouse click on the record to pop-up the menu. Select the SMS option on the menu.

The SMS dispatch window is displayed.

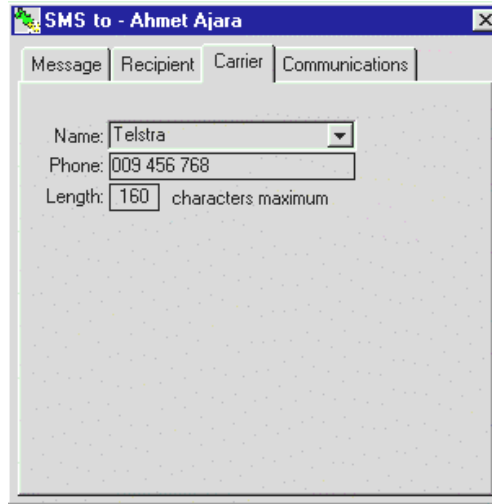
If there is already a mobile ph number on the screen, simply type the message. The Append options will append the details of the sender.

If the mobile phone number was not displayed or another contact was to be selected click on the recipient tab.

Here you can select a new module and the contact from that module. Please note that the dropdown lists contains only the records of the persons with the mobile phones.

Otherwise, you should enter the mobile phone number manually on the first tab.

The Carrier tab displays the default SMS carrier details.



If the user is authorised to change the carrier during run time it can be done on this tab.

The Communications tab shows the details of the messages to and from the carrier.

SMS Log

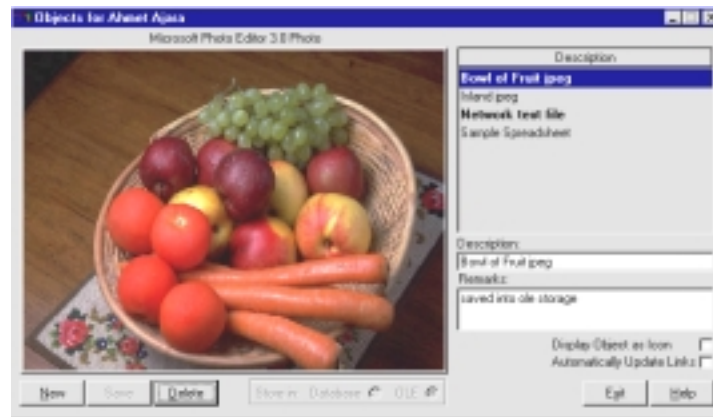
System logs the SMS messages in the Smslog table.

SMS Server Dispatch

Efficiency Task Manager includes a function, which can be scheduled at intervals to check the log file and send the messages.

Pictures and Objects

This program is used to maintain attached pictures, graphics, and video objects to the selected records in the system.



Screen Controls

On the right side is a list box showing four stored objects for the selected record.

As each row is selected, the corresponding object is displayed on the left hand side. The rows in the list box can be either bolded or un-bolded. A row is bolded if the object is saved into the default storage.

As each object is displayed, the associated Description and Remarks fields will also be displayed.

The check boxes on the lower right-hand side are used to change the display of the selected object.

Display Object as Icon

Checking this checkbox will display an icon instead of the usual picture

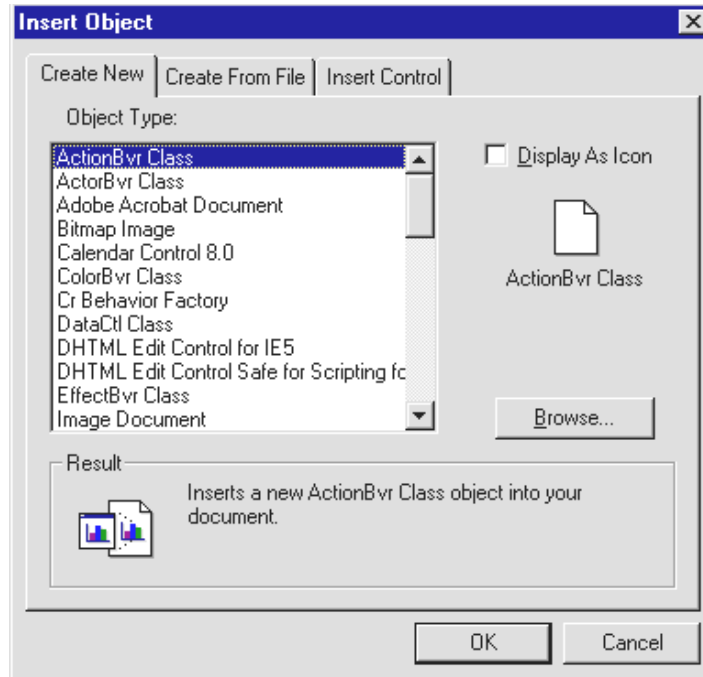
Automatically Update Links

Checking this check box will cause the link to be automatically updated when any row that was save with the Link option is selected.

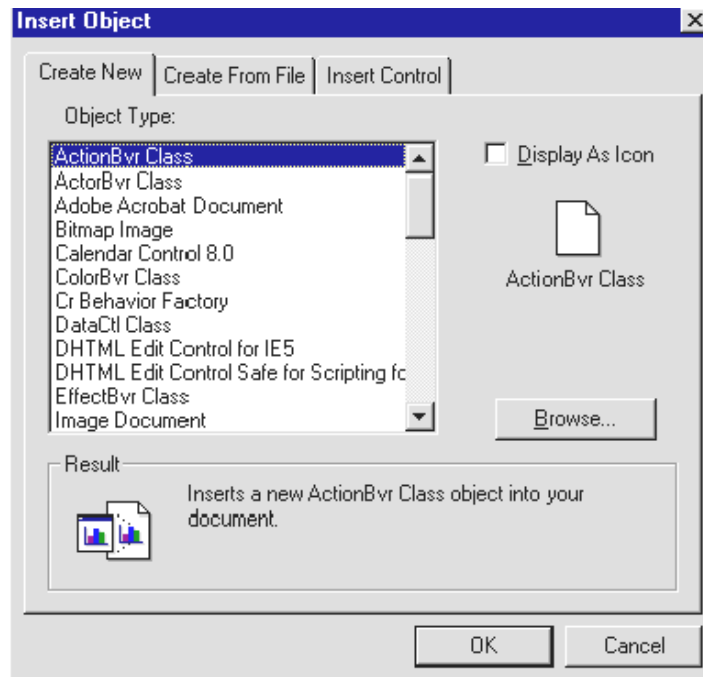
There are two types of storage for objects available: Database and OLE. The radio buttons indicate which type of storage is to be used (i.e. the default storage) when saving a new record.

New Button

Clicking this button will allow the selection and display of an object. The following screen will display first:

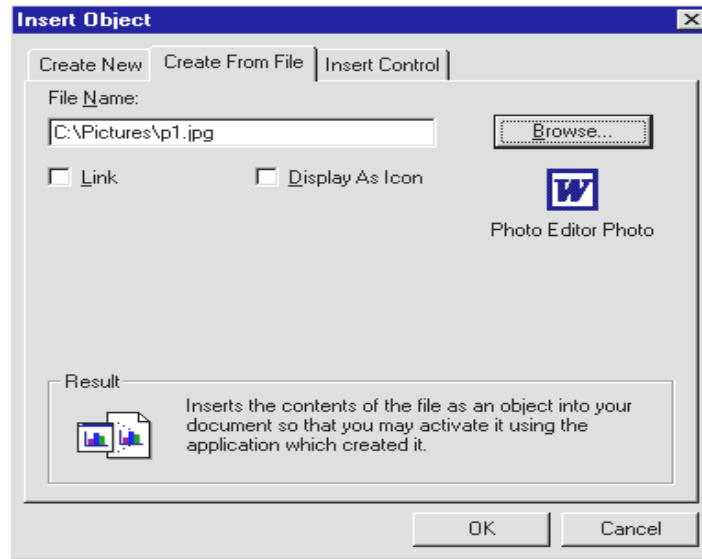


Select the 'Create From File' tab and the following screen will be displayed:



You may type in a file name or find a file by using the Browse button. After a file has been selected, the link option will be enabled. If you want to store

a copy of the object the do not check the Link checkbox.



Checking the Link checkbox will cause only a link to the file to be stored instead of a copy of the file but note that not all object types may be linked and they will cause an error message to be displayed when the object is displayed.

If the object displays correctly, enter a description and remarks in the left hand side fields. The description field is required.

At this time, if the Multi-Storage mode is enabled (see below) then the radio buttons will be enabled to allow selection of storage type.

Save Button

Clicking this button will save the object to a new record. If any alterations are made to description or remarks fields for an existing record then this button will save the changes.

Delete Button

In normal operation, clicking this button will only allow the selected row to be deleted if it is bolded. However, if the Multi-Storage mode is selected (see below) ANY row may be deleted.

User Options

As aforementioned, an object is normally stored in the default storage as indicated by radio buttons. User Options called 'OLEStorageMethod' can set which storage type is the default. Setting this to 'D' stores the row in the Database and 'S' stores the row into OLE Storage.

If OLE Storage is selected, User Options/Global/OLEStoragePath should also be set so the File may be found if its location is different from the default file path.

Multi Storage Model

In normal operation, all objects will be stored in the same type of storage but for the sites that require multiple storage types, the type of storage to be used can be selected when a new record is saved

This mode may be enabled only by the support organisation.

User Flags

Each Module record can be flagged with a user defined user flag.

The Module User Flags are maintained on this window.

From the module, while an existing item is open, select Options, Maintain

User Flags from the right click mouse menu.

These fields are available as user defined fields with a maximum of 10 characters or used as a drop down from preset values assigned by your supervisor.

Search Engine

Efficiency Modules are provided with two levels of search engines: Standard and Enhanced.

Search button, when clicked while in the module, the search engine window is displayed:

Standard Engine

Product Description	Id	Category Id	Status
Angle Adaptor 250 mm Type B	P25ADPTB	DT	Active
Angle Adaptor 250 mm, Type A	P25ADPTA	DT	Active
Diffuser 250 mm Blackout	P2568D	NV	Active
Diffuser 250 mm Clear	P256	NV	Active
Diffuser 250 mm Slimline	P256SL	NV	Active
Diffuser 250 mm Translucent	P2560P	NV	Active
Diffuser Liner 250mm	P25DIFL	NV	Active
Dome 222 mm Polycarbonate	P222	2P	Active
Dome 250 mm Clear	P251	2P	Active
Dome 250 mm Translucent	P2510P	2P	Active

There are two sections on this window. You can enter any selection criteria in the top Query section and click on <Find> button, the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Main window with the selected member record.

If the name or the description was fully or partially entered in the main window before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Command Buttons

Find: After entering the query criteria click on this button to display the product list.

Reset: Resets the selection criteria.

New: Click on this button if you wish to create a new product.

Left and Right Arrows: To switch from one product to another in the

product search list.

OK: Select a product and click on this button to view it in product main tab.

Close: To close the search engine screen.

Help: Activates the help screen relevant to this section.

Search Options

The following radio buttons will switch between the appropriate query and list data windows.

Standard: Standard search

Profiles: Search for product with profiles.

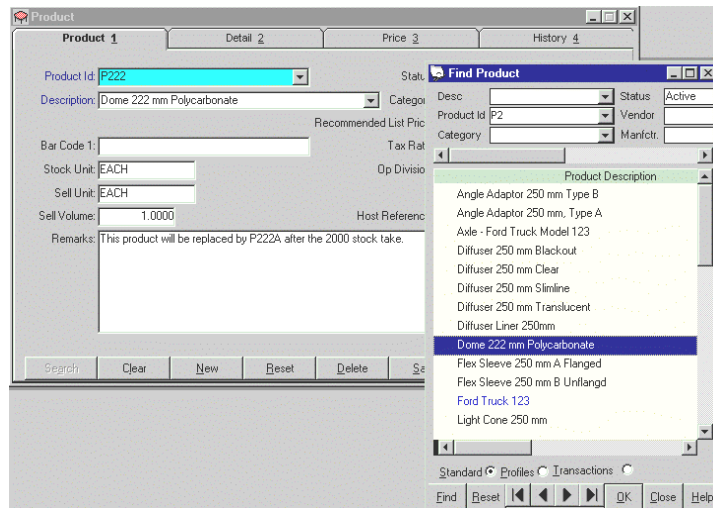
Transactions: Search for the products with transactions.

Enhanced Engine

Efficiency Module Search engine is enhanced to perform an optional on line continuous pick list function.

If the 'SearchEngineStaysOpen' entry in the User Options under the related Module is set to 'Yes', System will change the standard behaviour of the search engine to a continuous pick list.

For example, when the Search button is clicked on the Product Module Tab, the following is displayed:



The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button.

Double click on the selected line or click on the OK button will display the details of the selected record on the Product Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list. The record can be fully maintained on the Module Tab window.

Data Expansion

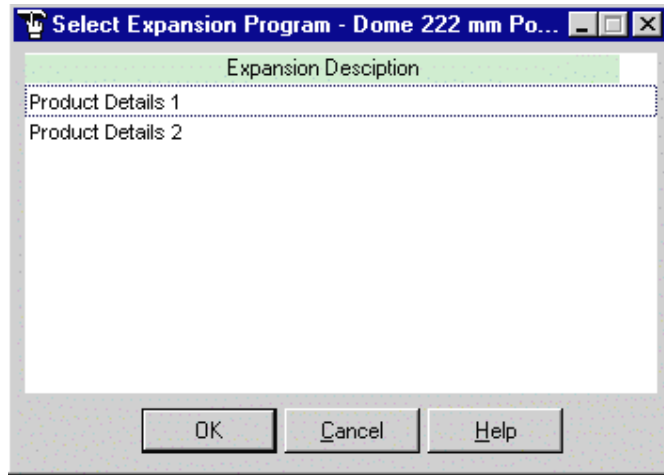
Efficiency module records can be expanded in two ways:

- Module data expansion – One to One expansion
- Module Transactions – Transactional Expansion.

Module Data Expansion Additional information can be created for each Module record.

The Record Expansion should be created by the supervisor using development's kit (if available).

The following screen is presented to the user when accessing the Record Expansion option from right clicking mouse button.



A list of available Expansions is displayed. When the user highlights the selected option, they will be presented with the site defined expansion screen.

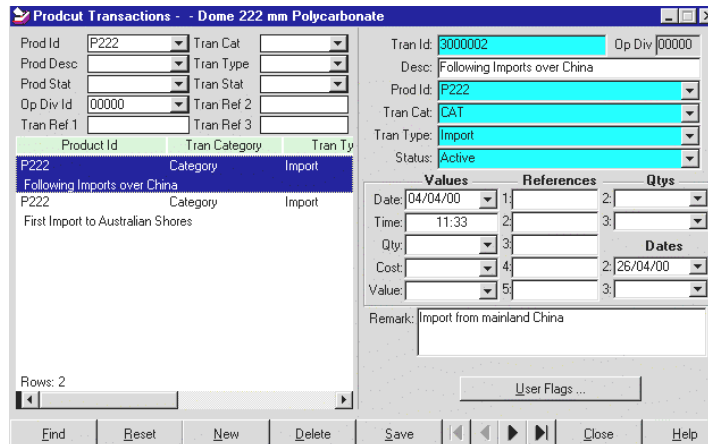
Please refer to the Supervisor's Manual for details on how to set-up Product Expansion Screens.

Module Transactions

Transactional information can be maintained against each Module record. In the appropriate Module, while having a record opened on the screen, right click the mouse button and select Attach Transactions option from the menu, or by selecting the Transactions option from Prepare option in menu bar. The user will be presented with the following screen.

The Following tables must be maintained for each module

- Transaction Category
- Transaction Type
- Transaction Status



Query and Display

Make the query selections at the left top section of the window. Click on the <FIND> button.

The Pop-up Menu on the list section will allow the user to use the E-mail (if available), filter, print, and sort functions. To bring up the pop-up menu, right click mouse button.

Maintenance

To make changes to a transaction entry, highlight the entry from the list and make changes on the right side of the screen and click on <Save> button to save the changes.

Fields

Tran Id: The Transaction Id is created automatically by the system as a sequential number.

Desc: Description for this Transaction.

Tran Cat: Use the drop down to select the Category this transaction will belong to.

Tran Type: Use the drop down to select the type that transaction will belong to.

Status: Used to identify if this transaction is 'active' or 'inactive'.

References: User definable fields as set-up by your supervisor.

Qtys: User definable fields as set-up by your supervisor.

Dates: User definable fields as set-up by your supervisor.

Value: User definable fields as set-up by your supervisor.

Notes: Enter Remarks or additional comments about this Transaction.

User Flags: Pressing the <User Flags> button will launch the user flags window.

Profiles

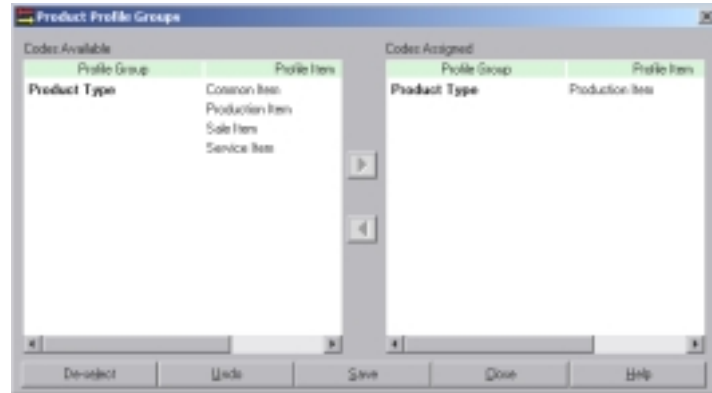
Each Module record can have many profile items attached to it. When selecting the 'Attach Profiles' option from right clicking mouse button, the screen below will be activated.

Profile Group	Profile Item	
Product Type	Production Item	PF

Here the user can see all the profile groups/items attached to this Module record, and add additional groups and items. Pressing the Groups button will launch the Module Product Profile Group assignment window. Pressing the Items button will launch the Module Profile item assignment screen for the highlighted group.

Profile Group Assignment Window

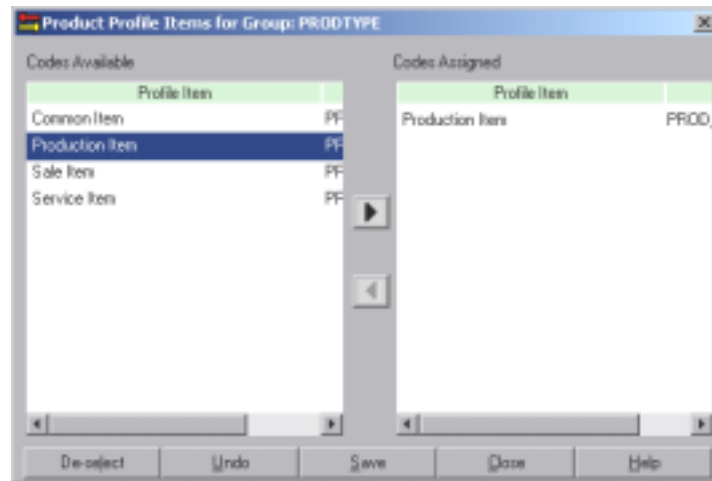
This window allows the user to assign Profile Groups and Items to the product record.



The user can highlight the group they wish to assign to this record. By default the first profile item will also switch across. Only the groups can be assigned in this window. To assign multiple items from a group, the Items button needs to be pressed in the Profile Screen.

Profile Items Assignment Window

This window allows the user to assign Profile Items to the selected Profile Group for the Module record.



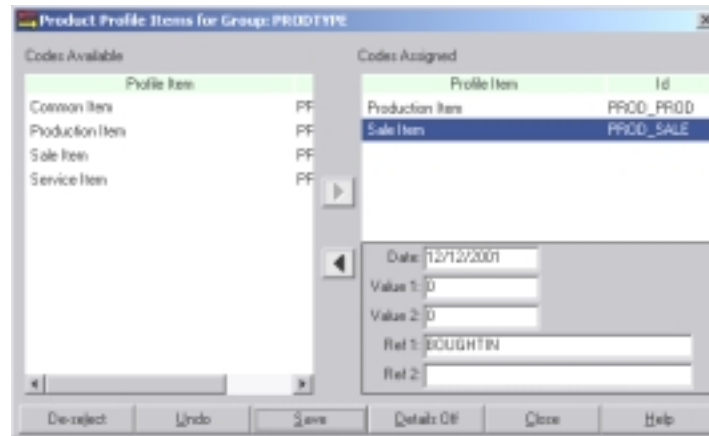
Module profiles assignment window can add various universal values to the assigned profile.

Date
 Value 1 (Numeric)
 Value 2 (Numeric)
 Reference 1 (String)
 Reference 2 (String)

Select one profile item and click on the Details On button. Enter the values and click on the Details Off button.

The profile options on the Search Engine windows have the selection criteria

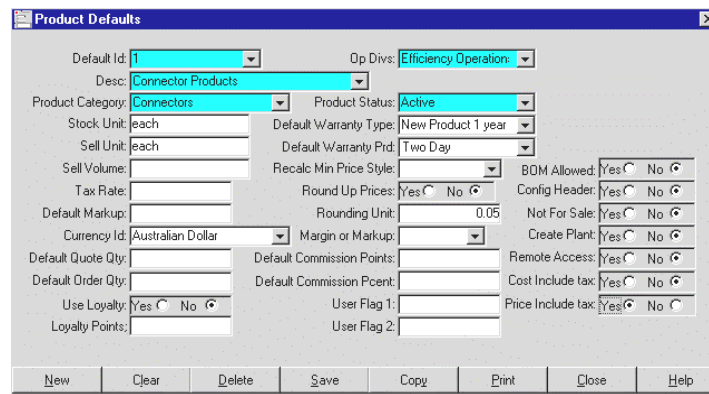
for Profile Date (From – To); for Reference fields (LIKE and wild card)



Module Defaults

If there was a module default assigned to the user, the module default values will populate some of the fields.

To make changes to a transaction entry, highlight the entry from the list, make changes on the right side of the screen, and click on <Save> button to save the changes.



During data entry, the module master screen is populated with the pre-defined default values for each user. The defaults are assigned to the users in the User Options.

User can select another set of default values from the pop-up menu.

Record Duplication

User can duplicate records by selecting option, duplicate options from right clicking mouse button while record is displayed on the screen.

Depending on the module, a pop-up window may prompt new values for the new record or simply change the values on the data entry screen.

Statistics

User can check a record statistics, while in the record, right click mouse button and select statistics option

Product Record History for P3V524

Setup Date: 05 05 96

Last Update: 28 09 99 11:00 am

Last Upload: []

Last Download: 02 05 97 5:40 pm

Delete Status: N

Update Type: Edited

Updated By: Ahmet Ajara

OK

Graphics

Efficiency is provided with two types of graphics presentation.

1. A **dynamic Graphics object** is added to the system to allow the user to convert the list displays and reports on the screen to graphic displays and maintain the results on the fly.
2. **Graphical Analysis Object** for each module with a very large selection of options will be added to the system in the next version. The Analysis object for Executive Module is provided as a sample of this powerful on line analysis object

How to start the Dynamic Graphics Object?

Right mouse click and select the Analysis option of the Print Menu from the pop-up menu



Note: This menu option is not repressible. Therefore it will do nothing if it is used in the data entry or single record display windows

Graphics Object

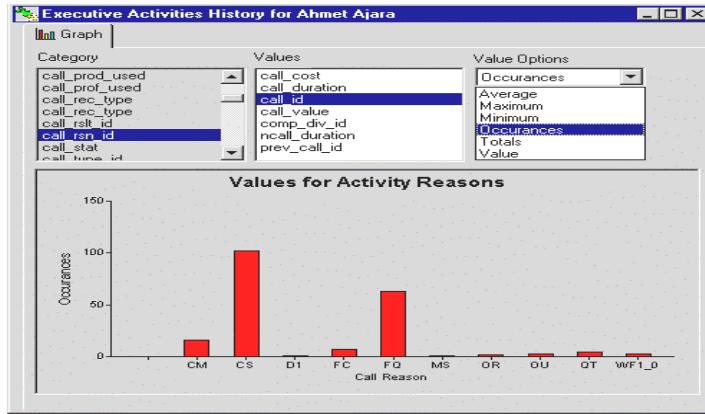
Click on the Analysis menu item to start the graphics object.

There are the following sections on this sheet.

Category: The list of all the Non numeric fields from the previous list. The item from this list will constitute the X-axis of the graph.

Values: The list of all the numeric fields from the previous list. The values of the item(s) from this list will constitute the Y-axis of the graph.

If you select more than on value field, the results will be shown on the graph as series of data.



Value Options

Will allow the user to establish the format of the values. The available options are:

- Occurrences
- Values
- Total
- Maximum
- Minimum
- Average

Right Mouse click

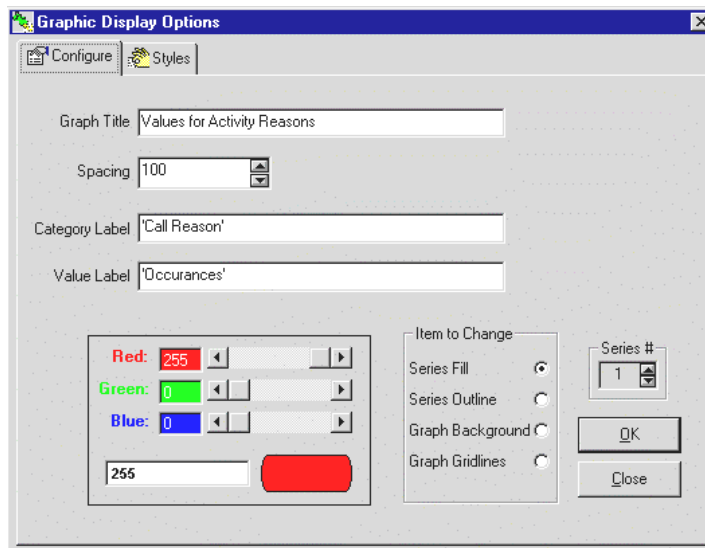
If you right mouse click on the data of the graphics, a Pop-up box will display the value of the data.

If you right mouse click on the window, the options Pop-up Menu will allow you to:

- Start options window
- Save to Clipboard
- Display Clipboard (NT Only)
- Print Graphics.

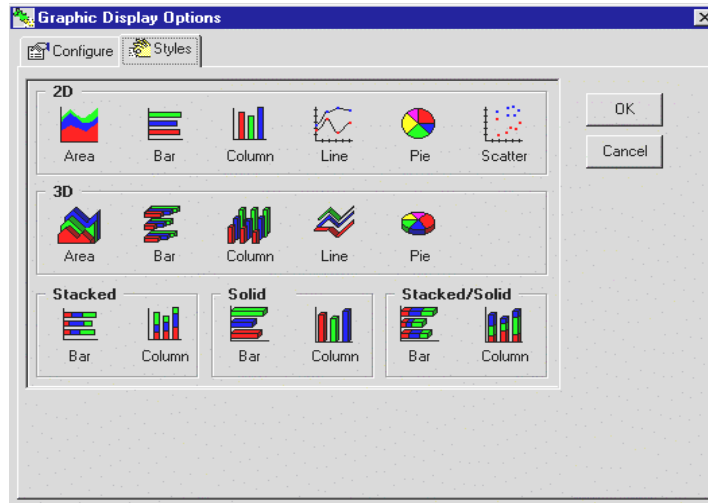
Options Tab

The Options tab allows the user to change the various attributes of the graphics.



Styles

Click on the styles tab to select another graphics style.

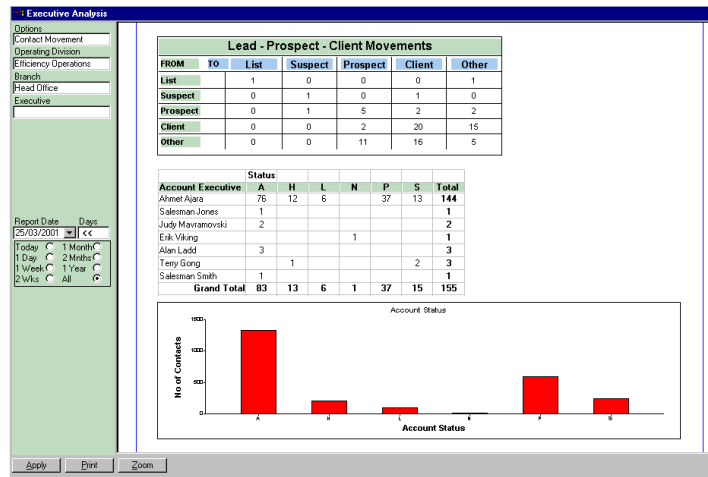


Notes: If you close the original list you will lose the data connection on the graphs sheet. You may still print or save it to the clipboard.

Graphics Analysis Object

Click the right mouse button and select the Analysis option of the Enquiry Menu from the pop-up menu of the module tab for a selected record, or alternatively select the Analysis option from the Modules Menu for the general analysis.

Only the Executive analysis is available for this release.



The left side of the window is dedicated to entering various selection criteria for the analysis.

Use options drop down to select various analysis options for the module. For example the Executive Module the following analysis options are available.

Company Movement	Activity All
Company Status	Activity Reason
Contact All	Activity Result
Contact Movement	Activity Type
Contact Status	Quotation All
	Orders All

Depending on the option selected the related columns for the selection criteria are displayed. Once the criteria was entered click on the Apply button to generate the graphs.

Top and Bottom Enquiry or Best and Worst Performers

EFFICIENCY provides an enquiry tool to report in real time the selected numbers of best or worst performers as the selected database query entities against the nominated Performance Criteria for a nominated period.

Database Query Entities

- Company
- Contact
- Executive
- Campaign
- Campaign Split
- Event
- Event Split
- Product Category
- Product
- Services
- Model
- Plant
- Major Problem Key
- Minor Problem Key
- Equipment Fault

Performance Criteria as Value and Quantity

- Sales
- Order
- Quotations
- Events
- Donations
- -General
- Phone
- Visit
- Written

Selection and Output Options

The following chart details the Selection and Output options for the Best and Worst performance.

Item	Sale	Quote	Order	Service	Event	Donation	Activity	ActPh	Act Visit	Act Write
Company	X	X	X	X	X	X	X	X	X	X
Contact	X				X	X	X	X	X	X
Executive	X	X	X	X	X	X	X	X	X	X
Campaign	X	X	X	X	X	X	X	X	X	X
Campaign Split	X	X	X	X	X	X	X	X	X	X
Event					X					
Event Split					X					
Product Cat	X	X	X	X						
Product	X	X	X	X						
Model				X						
Plant				X						
Major Key				X						
Minor Key				X						
Fault				X						

Access

Best and Worst (Top and Bottom) enquiries are accessed from the Enquiry menu of the related modules.

The Performance data is accessed by either'

- Double clicking on the selected best or worst line item or
- Selecting the menu item of the Query option of the Pop-up menu

The following are the two examples of top and worst performers during selected period.

Example – Top 10 Customers

Number	ID	Name	Qty	Value
1	50002	Green Ribbon Mx	1	234,567.00
2	50000	White John Mx	1	145,000.00
3	010066	Hold Group Fisheries	13	5,464.91
4	010112	Altech Business Technology	2	4,550.16
5	010500	Action Marketing	10	1,065.91
6	1000	Everything Shop	3	789.00
7	012500	ControlAust Pty	1	223.80
8	010317	AVA Systems Pty Limited	3	168.55
9	011600	General Marketing Ltd	1	100.00
10	010114	Electo Images Pty Ltd	1	11.70
Total			36	391,941.16

Example – Top 10 Customers

Number	ID	Name	Qty	Value
1	7402_1402	Blanco BMS 682x Stainless steel	1	12.00
2	7402_1601	Chef EHOFS55 stainless steel cooktop	1	12.00
3	7402	Elec Appliances	4	12.00
4	7402_1011	Chef Select EWVSLW Wall Oven	4	12.00
5	GSTF	GST Entrance Fee	1	50.00
6	P250LCA	Light Cone 250MM	1	65.00
7	P254DP1E	Angle Adapter 250 mm Type B	12	84.00
8	7402_1220	Chef Business EWDFM6L wO	1	200.00
9	7402_1404	Blanco BMS 682x Stainless steel	1	200.00
10	P3452B	Connector Base	1	235.00
Total			27	682.00

Performance Analysis

The performance analysis of a selected entity can be accessed by

- Double clicking on the selected best or worst line item or
- Selecting the menu item of the Query option of the Pop-up menu.

Example - Performance analysis example for a selected Campaign Split

Activity	Qty	Value
Sales	434	48,395.00
Quote	2	100.00
Order	3	300.00
Service	0	.00
Event	0	.00
Donation	750	400.00
Activity	543	400.00
Activity PH	571	400.00
Activity Mail	0	.00
Activity Written	206	.00

Example - Performance analysis example for a selected Company

Activity	Qty	Value
Sales	0	.00
Quote	3	788.08
Order	4	358.96
Service	4	436.00
Event	0	.00
Donation	4	.00
Activity	80	.00
Activity PH	19	.00
Activity Visit	0	.00
Activity Written	6	.00

Budget Management

Budgets can be set against the individual records of the following entities

- Executive
- Campaign Split
- Company Division
- Contact
- Product Category
- Product

Budget Definitions

The current budget year, the first day and the last day of the budget are controlled by the value in the Global section of the Shared Options.

These values can be updated manually or the supervisor Bulk Budget Update utility automatically sets the current budget year.

The monthly budget values for each record from the above list can be assigned by selecting the Module option from the Pop-up menu.

Year	Quotation	Order	Sales	Service
2003	20,000	10,000	10,000	1,000
2002	20,000	15,000	10,000	1,000
2001	20,000	10,000	10,000	1,000

Modules	Value	Quantity	Action	Minutes	Quantity
Quotation:	20,000	2	Ph Inbound:	2,000	10
Order:	10,000	1	Ph Outbound:	4,000	20
Sales:	10,000	10	Meeting:	10,000	10
Service:	1,000	3	Written:	10,000	10

Performance	Value	Points
Quotation:	12,000	20
Order:	120,000	12

Budgets can be set for any forward years for each record.

Typically, budgets can be set as an average monthly value by value and quantity.

Budget for modules relates to the Quotations, Orders, Sales, and

Services. These are common for all the budget entities. These values relates to the actual total value and the no of times of occurrences in the module i.e. No of quotations issued, no of orders received etc.

Budget for Action relates all entities except products. These values relate to the total time spent during the activity and no of occurrences of the activity i.e. No of Inbound Phone calls.

Budget for Performance relates to only executives. These values relate to the total commission values or performance points accumulated within the quotation and order entry modules.

To enter a new budget, simply click on the <New> button.

Year	Quotation	Order	Sales	Service
2003	20,000	10,000	10,000	1,000
2002	20,000	15,000	10,000	1,000
2001	20,000	10,000	10,000	1,000

If you want to copy the budget from another year or from another entity, click on the <Copy On> button.

Enter the appropriate values to copy from fields and click on the <Apply> button. System will display the copied values on the screen. Make the required changes and save it.

The values will only be effective for the current system budget year.

As soon as a budget record is created, the corresponding history record is created automatically.

History Update

The corresponding actual values against budgets can be updated in two ways:

- **Manual:** Using the History Bulk Update in the supervisor module.
- **Automatic:** Using the 'Update History Function' of the Efficiency Task manager

For example, the values for the Executive are accumulated in the Executive History Table for the following periods for values and quantities.

Today	Last Month 1	Last Year 1
WTD	Last Month 2	Last Year 2
MTD	Last Month 3	Last Year 3
YTD	Up to Month 12	

The Executive and Campaign History Tables are automatically created by the system regardless of the budgets had been defined or not.

NOTE: As system uses the Current Budget Year value from the Shared Options it must be maintained to reflect the current year.

Alternatively, the Company, Contact and Product Histories are only created if there is a current budget definition for the record.

Enquiry for Actuals vs. Budgets

To get the instant information for the Actual values vs. the Budget Values use the menu option at the Company or Contact Module menu.

Budget Items	Mnth Budget	WTD	MTD	YTD	Prev Mnth 1	Prev Mnth 2
Year: 2001						
Ahmet Ajara [01]						
Value Quotations:	20,000	3,000	125	3,000	125	12,000 (93)
Orders:	10,000	1,300	95	4,000	500	1,000 (99)
Sales:	10,000	1,600	140	2,500	275	3,000 (96)
Services:	1,000	800	1,100	1,200	1,700	3,000 (63)
Qty Quotations:	2	3	2,150	3	2,150	12 (26)
Orders:	1	1	1,400	4	5,900	12 49
Sales:	10	12	1,700	24	3,500	12 (85)
Services:	3	3	1,400	12	5,900	12 (50)
Performance Quotations:	12,000			22 (97.31)	22 (99.98)	0 (100.00)
Orders:	120,000			-2,240 (128.00)	-2,122 (100.22)	4 (99.96)
Performance Points Quotations:	20			6 (350.00)	6 (96.28)	0 (100.00)
Orders:	12			-224 (8,100.0)	-210 (316.94)	44 (66.67)
Executive Conversions Summary						
Ordes/Quotes:	50.00	(13.33)		(66.67)	(83.33)	(91.30)
Sales/Quotes:	50.00	(6.67)		(66.67)	(50.00)	
Sales/Orders:	100.00	(23.08)		(37.50)	(200.00)	
Executive Activities Summary						
Time Ph Inbound:	2,000					

By making the appropriate group selections for the Executives, the Branch, Department, Company etc. Actuals vs. the Budgets can be obtained.

At the end of each report the report totals analysis is also printed.

The percentage values are also displayed against each value in this report. The negative percentage values are displayed in brackets (also in colour red on the screen displays) and the positive percentage values are displayed without brackets (also on colour black in the screen displays).

Use the Pop-up Menu for the print, graphics or to save as in another file format.