

User Guide

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Overview

Vedatrak is a fully unlocked, web-accessible, modular CRM solution that helps you achieve virtually any customer management goal. This easy to use solution developed specifically for FileMaker helps you plan work, collect structured information about your clients, learn their needs and preferences and accumulate an organized record of your interactions. These activities serve to build longterm, prosperous relationships that will increase your customers' loyalty and your overall profitability.

Features

• Instant Web Publishing

Full IWP support allows users to access and edit data from virtually any web browser without purchasing and installing additional FileMaker Pro copies.

• FM Go Optimized

Vedatrak is FM Go optimized. Do your daily work on the go with your lovely iPhone or iPad.

Modular Solution

Vedatrak is modular, meaning each solution has only the functions you require. To simplify the search for information, all modules are linked together. When additional Vedatrak modules are purchased, they seamlessly integrate and begin functioning immediately within the existing set.

Contacts Organization

The <u>Contacts</u> module helps organize information for all of the contacts in your database. Contacts can be grouped by type, like **Staff** or **Customers**. Contacts can be connected to another contact called a **Parent** contact for easy organization of individuals within a company or organization. Working straight from the customer's card, you can access data in any other linked module, like completed and planned meetings, appointments, documents and correspondence.

Customer Interaction Management

A complete interaction history for each contact is accumulated within the program. This information is accessible to all database users so that work can be planned and tracked in the most effective manner possible. Collecting this information will help you learn your customers' needs and preferences and build relationships.

Handy Dashboard

The <u>Dashboard</u> module is a personal workspace for each Vedatrak user. It provides quick access to the most important information from other modules like appointments, e-mails, contacts and documents.

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Simple Time Management

Using the <u>Calendar</u> module, each Vedatrak user can plan work by scheduling tasks and appointments. Appointments can be assigned to any user in the system and scheduled singly or on daily, weekly, monthly or yearly cycles. Each user can elect to receive e-mail notifications for new appointments and comments on existing appointments.

• Correspondence Tracking

<u>Mail</u> is used to carry out all correspondence. Each e-mail is associated with a task, contact or document. Each user can filter correspondence by task or contact and group messages by topic.

Sales Documents

Vedatrak supports the sales process by tracking order, quote and purchase history, costs, payments and simplifying invoicing. Invoices can be created directly from any order. All associated sales documents for an order can be easily accessed from any single document, including payments and invoices.

Stock

The <u>Stock</u> module provides a centralized resource to organize your company's products using different categories. Track stock quantity for each product using Purchases Orders and Sales Orders.

Campaigns

The <u>Campaign</u> module supports the sales process by tracking promotional campaigns assigned to different prospects and customers groups.

• Template of typical module

Template module allows you build your own Vedatrak module with the minimum cost.

• Files

Use the Files module to attach documents in almost any area of Vedatrak.

• Smart Links

Smart Links allow users to send database links to other users by e-mail, any instant messenger or the <u>Messaging</u> module.

User Management

The <u>Users</u> module allows administrators to manage users across all solution files in one convenient location.

Multilingual Capabilities

<u>MultiLang</u> comes complete with several preinstalled language sets. Using the handy language editor, additional dictionaries can be easily created at any time.

Customizable Appearance

The <u>Themes</u> module can be used to change colors, button styles and icons.

• Internal Instant Messaging

The <u>Messaging</u> module provides an integrated messaging system for communication between database users.

• User Preferences

Each user can save individual User Preferences.

System Requirements

Vedatrak requires one of the following FileMaker products installed on your system:

- FileMaker Pro 8.5, 9, 10, 11
- FileMaker Pro Advanced 8.5, 9, 10, 11
- FileMaker Server 8, 9, 10, 11
- FileMaker Server Advanced 8, 9, 10, 11

Installation Notes

Unzip the downloaded package to your desired location. You can click on any of the Vedatrak files to launch the system. The most common method is to open the **Vedatrak Dashboard** file first.

Use the following predefined accounts to login to Vedatrak:

Login	Password	Role
Admin	Admin	System Administrator
Bob	Bob	Administrator
Jason	Jason	Sales Manager
Lucy	Lucy	Sales Staff
James	James	Power User

Note: Changing passwords immediately after installing Vedatrak is strongly recommended.

- Vedatrak can operate in single user and multiuser environments.
- To use Vedatrak in a multiuser environment, it is recommended to install it on a FileMaker Server.
- Vedatrak has full support for FileMaker's **Instant Web Publishing** (IWP) feature. Users may access and edit data using any web browser.
- Vedatrak can be accessed remotely with FileMaker Pro client software.
- To use **IWP**, you must enable the feature in **FileMaker Pro** software preferences or in the Admin Console if you are using a **FileMaker Server**.

Vedatrak Basics

User Roles

There are the following predefined User Roles in Vedatrak:

System Administrator

System Administrators are [Full Access] users who can change data, scripts, custom functions, database structure and user settings.

Administrator

Administrators can manage Vedatrak users, edit data, manage the database and scripts (except areas which explicitly require [Full Access] privileges.)

Sales Manager

Sales Managers can create and edit all business data. They can edit their own data as well as other users' data.

Sales Staff

Sales Staff can create data, including Contacts, Orders, Appointments, Invoices, etc. These users can edit only their own data.

Power User

Power Users can edit all data within the database. This role is similar to the Administrator but cannot conduct database management or user management.

Common Controls

Most Vedatrak modules have the same set of panels and controls:

900	Vedatrak	Contacts	
Contacts	Dashboard Contacts Calendar Mail St	Navigation Bar Invoices Purchases Cam	npaign Files Messaging
		arch Bar 🔍 🔍	Deta Views Tab Bar
E-mail urector@brasstoys.com	Created, Byentact # Modified By Davis	Sales Our Rep. Lucy Online, Help B Discount 10% Price Level 3 New, Button Tams 2% 14;Net 30 V Phones	SUI Solutions V Status Smail V Acc No Custom Properties Gustom.Properties Area
	endar (0) 🕂 Mail (1) 🕂 Quotations (2) 🕂 Ord		
Contact # Type View/Edit Bu		Address 4066 Duke Lane, Newark, NJ, 07102, U.S.A.	
25 Individual Resour	rce Chad Sheard Vocational educ		۲
	Linked Ite	ms Area	
Record: 2 / 17 (To Status Bar			100 Preferences Re-login

Contact	S	Dashbo	ard Contacts	Calendar Mail Sto NaVig	ation Bar Invoices Purchases Campaign Files Messaging	P
🔁 🔁 🙂	Tool Bar	000		Search B	Bar O O Deta Views Tab, Ba	
Contact #	Created	Туре		NameSortable Headers	Address	
CB1	9/25/2009	Company	Brand	SUI Solutions	380 Hurricane Lane, Suite 201, Williston, VT, 05495, U.S.A.	0
CC4	9/25/2009	Company	Customer	Best Brass Toys Inc.	4466 Confederate Drive, Utica, NY, 13502 , U.S.A.	
IS10	10/15/2009	Individual	Staff	Miss. Lucy Mays	Ap #664-143, Nisi St., Williston, VT, 05495, U.S.A.	10
IR11	View/{Ec	lit Button	Resource	Mr. Bob Rollins	837-6380, Aptent Av., Williston, VT, 054 Delete Button	 8
JS12	10/15/2009	Individual	Staff	Mr. James Travis	934-3728, Phasellus Rd., Williston, VT, 05495, U.S.A.	8
CC18	10/16/2009	Company	Customer	Hanox	286-3075, Proin Avenue, West Springfield, WV, 83125, U.S.A.	8
CC19	10/16/2009	Company	Customer	Cornbit	4870 Deans Lane, Westbury, NY, 11590, U.S.A.	8
CC20	10/16/2009	Company	Customer	Ballanthem LTD	2332 Owen Lane, Fort Myers, FL, 33901, U.S.A.	8
CP21	10/16/2009	Company	Prospect	Dynamictons	2001 Buck Drive, South Burlington, VT, 05403, U.S.A.	8
CC22	10/16/2009	Company	Customer	Litobe	4952 Delaware Avenue, Sausalito, CA, 94965, U.S.A.	8
IC23	10/16/2009	Individual	Customer	Mr. Roger Turner	102 Werninger Street, Houston, TX, 77032, U.S.A.	8
CP240	10/16/2009	Company	Prospect	Affordable Promotion	3591 Hoffman Avenue, Huntington, NY, 11743, U.S.A.	8
) IR25	10/16/2009	Individual	Resource	Chad Sheard	161 Mattson Street, Portland, OR, 97204, U.S.A.	8
IS26	10/16/2009	Individual	Staff	Mr. Michael Bell	4066 Duke Lane, Newark, NJ, 07102, U.S.A.	8
CV9	3/24/2010	Company	Vendor	SUI Solutions FM	380 Hurricane Lane, Suite 201, Williston, VT, 05495 , U.S.A.	8
IS82	4/2/2010	Individual	Staff	Mr. Jason Burch	4333 Vestibulum. Av., Williston, VT, 05495, U.S.A.	8
CV3	10/27/2011	Company	Vendor	SUI Solutions Mobile	380 Hurricane Lane, Suite 201, Williston, VT, 05495 , U.S.A.	8

Navigation Bar

Use the Navigation Bar to switch between modules. The active module is highlighted.



Tool Bar

The Tool Bar is located at the top of each layout and may contain the following buttons:

Button	Action
G	Navigate to first item.
	Navigate to last item.
0	Navigate to previous item.
0	Navigate to next item.
0	Add a new item.
0	Duplicate current item.
0	Add current item(s) to Bookmarks.
Ø	Copy link for current item(s) to <u>send via</u> <u>Messaging</u> .
٥	Print current item.
8	Delete current item.
S	Apply changes.

Search Bar

Use the Search Bar to find records that meet specific criteria.



• To perform a general search, enter the information that you would like to locate and click **Find**

Solution to return all matches.

- To perform an advanced search within a specific field or fields, click **Find** with the search field empty to enter Find Mode. Find Mode allows users to return only specific results. Simply input data into your desired field(s) and press **Enter** to return all matches. If no items are found, you will see an warning screen.
- Click **Show all** to display all items.

Views Tab Bar

Choose between the Detail or List view using the Views Tab Bar.

Detail List

Status Bar

The Status Bar displays the following information:

• **Record** indicates the number of the current item, the number of items found, and the total number of items.

Record: 1 / 16 (Total: 16)

• Commit and Revert are used to save or undo current changes.

Commit Revert Record: 2 / 16 (Total: 16)

• **Read** and **Ignore** buttons are used to view or dismiss new messages in the <u>Messaging</u> module.

Read Ignore New message from Bob Rollins

Note: The Messaging module must be installed for this feature to function.

User Info

User Info provides quick access to the current user's settings.

User: admin / System Administrator Profile | Preferences | Re-login

- User displays the user's login and full name.
- Click **Profile** to view or edit the <u>User Profile</u>.
- Click **Preferences** to view or edit <u>User Preferences</u>.
- Click **Re-login** to login as a different Vedatrak user.

Linked Items Area

The Linked Items Area displays all associated items for ease of accessibility.

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Notes (0)	🛨 Contacts (2)	🕂 Calendar (0)) 🛨 <u>Mail (1)</u>	Quotations (2) Orders (2)	Invoices (1) 🕒 Files (0) Misc	
Contact #	Туре х	x	Name	Title	Address	
IS26	Individual	Staff	Mr. Michael Bell	Rental clerk	4066 Duke Lane, Newark, NJ, 07102, U.S.A.	<u>*</u>
🕤 IR25	Individual	Resource	Chad Sheard	Vocational education teacher	161 Mattson Street, Portland, OR, 97204, U.S.A.	

Online Help Button

Click **Online Help I** to activate the online help system.

New Button

Click **New •** to create a new item.

Edit/View Button

Click Edit/View Solution to access or change an item's data.

Delete Button

Click **Delete** ²⁹ to delete an item.

Go To Button

Click Go To (shown as <u>Underlined</u> text) to open an item.

Sortable Headers

Click Sortable Headers to sort the list as ascending or descending.



Custom Properties Area

Additional custom properties may be added in Vedatrak records.

Click New
 Inext to Custom Properties to create a new property.

• Select an existing property name from the list or create a new name.



• To edit the property name list, click **Edit...** In the **Edit Value List** dialog box, type each name on a separate line in the order you want them to appear. Then click **OK**:

Property 1	
Property 2 Property 3	
-	
	(Cancel) OK

Click **Delete** to delete a property value from the current record.

User Preferences

User Preferences allows users to edit default Vedatrak settings. To change user preferences, click the **Preferences** button in <u>User Info</u>.

Close Created 10/15/2009 6:08:18 PM by admin Modified 11/2/2011 6:05:43 PM by Bob General Language English	-	
Created 10/15/2009 6:08:18 PM by admin Modified 11/2/2011 6:05:43 PM by Bob		
ieneral		
Language English		Options
	v	Show number of items in active tab
Theme Metal	v	Show number of items in inactive tabs
		Always show Commit/Revert
		Show "I want improve this layout"
Calendar Options		_
Start week on Monday E-mail me about new appointments assigned to me		
✓ Show occupied days ✓ Show completed E-mail me about updates in appointments assigned by me		
Sun Mon Tue Wed Thu Fri Sat		
Browse		

General

- Select your preferred language from the Language drop down list.
- Select your preferred theme from the Theme drop down list.

Options

• Check next to **Show number of items in active tab** to display the number of items in the active tab.



• Check next to **Show number of items in inactive tabs** to display the number of items in the associated items tabs.



 Check the Always show Commit/Revert check box to display Commit and Revert buttons outside of IWP mode.



• Check next to Show "I want to improve this layout!" feature to enable the feature.

Module Preferences

Some Vedatrak modules have unique user preferences and settings. Click the tab with the module name to change the module preferences.

Dashboard	Calendar	Mail	Products	Messaging

For more information, see the following topics:

- Dashboard Preferences
- Mail Preferences
- <u>Calendar Preferences</u>
- Stock Preferences
- Messaging Preferences

System Preferences

System Preferences allows the <u>System Administrator</u> to edit Vedatrak system default settings. To change the preferences, login to Vedatrak as **System Administrator** then click **Preferences** in <u>User Info</u>.

0 0	Preferences		
System preferences		_	?)
		_	
Close			
Created 9/19/2009 11:47:04 AM by Admin	lodified 12/29/2011 4:23:43 PM by Admin		
General			Options
Language English		•	Show Currency Name : USD V
Theme Metal		•	Show number of items in active tab
Paper size Letter V			Show number of items in inactive tabs
Online Help URL http://filemaker.suisolutions.com/docs/h	elp/vedatrak/3.0/?page=		Always show Commit/Revert
			Always use WebDialog
			Show "I want improve this layout"
Modules Dashboard Calendar Mai	Stock Quotations	Orders	Invoices Purchases Messaging
Messaging Options	System messages		
Display messages for last 1 days	On entry En	er	
	On exit Exi		
Open on startup	When status changed Sta	tus changed	
Inform about new private messages	Icons		
		pied DND Offlin	
Inform about new public messages	ê 🖧 🖏 🤞	8 💰 8	3
Browse		_	

General

- Select the system default language from the Language drop down list.
- Select the system default theme from the Theme drop down list.
- Select the system default paper size from the Paper size drop down list.
- Change the Online Help URL field if necessary.

Options

- Check next to Show Currency Name to display the currency name in Vedatrak.
- Check next to **Show number of items in active tab** to display the number of items in the active tab by default.



• Check next to **Show number of items in inactive tabs** to display the number of items in the rest tabs of the tabs by default.



 Check next to Always show Commit/Revert to display Commit and Revert buttons by default outside of IWP mode.

Commit Revert Record: 2 / 16 (Total: 16)

• Check next to Always use WebDialog to display confirmation dialog boxes outside of IWP mode.

Confirm		
Are you sure you want to delete? Meeting 21 Team meeting		
	Yes	No

The below dialog is used in **IWP** mode because standard FileMaker confirmation dialogs are not web compatible:



• Check next to Show "I want to improve this layout!" feature to enable the feature.

Modules

In the **Modules** tab is a list of active modules list and <u>Navigation Bar</u> management.

Module Preferences

Some Vedatrak modules have unique user preferences and settings. Click the tab with the module name to change the default module preferences.

Dashboard Calendar Mail Products Orders Invoices Messaging

For more information see the following topics:

- Dashboard Preferences
- Mail Preferences
- <u>Calendar Preferences</u>
- Quotations Preferences
- Orders Preferences
- Invoices Preferences
- Purchases Preferences
- Stock Preferences
- Messaging Preferences

Dashboard

Dashboard helps you pick up where you left off yesterday and plan your work for today. In one convenient window, you can preview daily appointments and access **Quick Find**, **Bookmarks** and the **Recently Changed Information Area**.

Features

• **Quick Find** This convenient find field in Dashboard searches the full database for criteria matches.

• Daily Appointments Overview

Dashboard provides a preview of your daily appointments for easy reference.

• Individual Bookmarks

Add bookmarks to database spots you access frequently for easy navigation directly from the Dashboard.

• Team Member Notes

Other database users can post notes to appear on your Dashboard and vice versa.

Recently Changed Information Summary

Dashboard includes a quick overview of recently added or modified data. You can easily track the changes made by you, another user or all users.

Using Dashboard

Dashboard allows quick access to important information when you start work in Vedatrak.



Quick Find

Use Quick Find to find records that meet specified criteria

Contacts	▼	Find

• Select the information type you're looking for from the Type drop down menu.

Contacts	
Files	1
Invoices	
Multilang	
Orders	- 1
Products	
Users	
Mail	

• Enter the information that you want to find into the field and click **Find** to return a set of matches.

Daily Appointments Overview

The Daily Appointments area displays today's appointments.

- To add new appointment, click New next to Daily Appointments.
- To edit, view or comment on an existing appointment, click **Edit/View** next to the appointment to open the **Edit Appointment** window.
- Check or uncheck the box next to **Show Completed** to display or hide completed appointments.
 <u>Show completed</u>
- Click the **Completed** check box to the right of the appointment to mark the appointment as *Completed*.

Individual Bookmarks

Use Bookmarks to easily access Vedatrak items you use frequently.

- To add a new bookmark, click Add to bookmarks Sign on the record you would like to bookmark
- Click Edit/View
 to the left of the bookmark to access it.
- Use the **Type** drop down menu to filter bookmarks by type.



Click the **Delete** button 🥙 to the right of the bookmark to remove it from your bookmarks.

Recently Changed Information Area

In the **Recently Changed Information Area** is all recently changed information within Vedatrak that's accessible by you. Records can be filtered by change type (*Recently Created* or *Recently Modified*), the **Since** date (including quick links *Day*, *Week* or *Month*) and by user (including quick links *Me* or *AII*).

	Recently Created Modified	Since 6/7/2010	For	Day Week	Month	by Bob	▼ <u>All</u>
-							

• Use tabs to see recently changed information by module.

Click Edit/View
 to navigate to the changed record .

• To add a new record in **Notes**, **Contacts** and **Users** tabs only, click **New** • next to the corresponding tab.

Common Notes

The first tab in the **Recently Changed Information Area** is **Notes**. Vedatrak users can post team-wide notifications in this area.

🛨 Notes (3)	Contacts (0)	<u>Mail (0)</u>	Files (0)	Products (0)	Orders (0)	Invoices (0)	🛨 <u>Users (0)</u>		
Created	Note								
07.09.10 14:59:50 Bob wrote:	The photos	s from the Trade	Show are availa	able.				8	<u> </u>
07.09.10 14:59:36 Bob wrote:	The Trade	Show start tom	prrow!					8	
07.09.10 14:58:43 Bob wrote:	Use the glo	obal navigation	menu to switch b	etween modules.				8	*

- To add a new note, click **New** 🕒 on the **Notes** tab.
- Notes can be filtered in the same manner as the rest of the tabs.
- Click Delete
 One to the right of the note to delete it.

Service Modules

Use the Service Modules navigation bar to quickly access Users, Themes and MultiLang modules.



Note: These functions are available only to the System Administrator and Administrator.

Dashboard Preferences

Use **Dashboard Preferences** to manage the default settings in the <u>Recently Changed Information Area</u>. To change these preferences, click the **Preferences** button in <u>User Info</u>.

Show in Recently Changed		
Recently Created Modified	For Day Week Month	by Me <u>All</u>

Contacts

The **Contacts** module helps optimally organize contact information for business activities. Within any customer's card, you can easily access data in all linked modules, including completed and planned meetings, documents and correspondence.

Features

Organized Contacts

Contacts are defined by type within a customizable set of categories, like *Vendor*, *Customer* or *Lead*, for example.

Contact Properties

All contacts have standard properties, like address and phone number. Additional custom properties may be added at your discretion.

Contact Types

Associated contacts can be added to any existing contact, called a Parent contact. When working within any contact card, you can see its Parent contact or any nested contacts. The set of contact types is customizable.

Shared Contact Information

Each Vedatrak user may access all information and interaction history for any contact.

Linked Items

Each contact can be associated with different tasks, correspondence or documents.

Contacts Detail View

The Contacts Detail View provides access to the properties for the selected contact.

	ts	Da	ashboard Contacts	Calendar Mail Stock	Quotations Orders Invo	pices Purchases C	Campaign Fi	les Messaging ?
						00	Details	List
Created		55 PM by Jason	Mod	Iffied 6/24/2010 3:05:08 PM by Jas Customer V	Sales			SUI Solutions 🔻
	Best Brass		Parent cont		Our Rep. Lucy Discount 10%	Sales Pro	Source	Tradeshow 2009 Small
Name Title	0		Da Properties	100 C	Price Level 3 Terms 2% 14;N	et 30 🔻	Rating ACC No	VIP VIP
ity/State/Zip Country	Utica U.S.A.		NY	13502	Work 1 800 700 8	5757 🥝	Custor	m Properties
Web	director@bra www.brassto MSN	oys.com	@brasstoys.com					
Web	www.brassto	vys.com director	-	Quotations (2)		es (0) Misc	2	
<u>Web</u> IM	www.brassto MSN	vys.com director (2) + Calendar	-	+ Quotations (2) + Orders (Title		es (0) Misc	2	
Web IM Notes (0)	www.brassto MSN	vys.com director (2) + Calendar	r (0) 🕂 Mail (1)		2) Invoices (1) 🔶 File Address	es (0) Misc		f
Web IM Notes (0) ontact # Ty	MSN	vys.com director (2) 🕂 Calendar	r (0) 🛨 Mail (1) x Name	Títle	2) Invoices (1) Fili Address 4066 Duke Lane, Nev	vark, NJ, 07102, U.S.A		-
Web IM Notes (0) ontact # Ty IS26	www.brassto MSN Contacts	vys.com director (2) + Calendar x Staff	Mail (1) X Name Mr. Michael Bell Chad Sheard	Títle Rental clerk	2) Invoices (1) Fili Address 4066 Duke Lane, Nev	vark, NJ, 07102, U.S.A		2
Web IM Notes (0) ontact # Ty IS26	www.brassto MSN Contacts	vys.com director (2) + Calendar x Staff	Mail (1) X Name Mr. Michael Bell Chad Sheard	Títie Rental clerk Vocational education	2) Invoices (1) Fili Address 4066 Duke Lane, Nev	vark, NJ, 07102, U.S.A		-

Basic Properties

• Use the **Type** and **Category** drop down lists to specify the contact type (*Company* or *Individual*) and category (*Prospect, Customer, Vendor, Brand, Resource* or *Staff*).



• The category list is expandable. Select **Edit...** from the drop down list. Then, in the **Edit Value List** dialog box, type each new category on a separate line in the order you want them to appear and click **OK**.



- Upon indicating a **Type** and **Category** for the contact, a unique **Contact #** is generated.
- If a contact is an Associated Contact (ie: it is Individual of the Staff type), the Parent contact #

will contain the parent contact Contact #.

• Enter other properties, including Name, Company, Address, E-mail, etc.

Sales Properties

 If your company operates several **Brands**, select the appropriate **Brand** using the drop down menu.

		-	becano	LIDE		
010 2:57:18 PM	by Bob		NewBrand			
Sales			SUI Solutions			
Our Rep. Bob			Source			
Input Sales I Sales	Properties:		SUI Solutions			
ouroo			SUI Solutions		V	
Our Rep.	Jason		Source	1	•	
		•		Big	*	
Our Rep.	3%	•	Source	10 Aug 10 Aug 10	*	
Our Rep. Discount Price Level	3%	* * *	Source Status Rating	10 Aug 10 Aug 10	*	

• Click the **arrow** by **Our Rep** to select the sales rep associated with the new contact from the drop down list. The names included on the list are specific to the selected **Brand**.



• *Hint:* Any property with an **arrow** button can be typed or selected from the drop down menu.



Phones



- Click New In the Phones area to add a contact's phone numbers.
- Select the phone type (Home, Mobile, Fax or Work) and enter the number.
- Click Delete ⁴ to delete the phone.

Associated Contacts

Associated Contacts can be added to any existing contact, called a **Parent contact**. When working within any contact card, you can see its Parent contact or any nested contacts. The set of contact types is customizable.

- Click New 🕒 in the Contacts tab to add an Associated Contact.
- You can filter Associated Contacts using the Type and Category drop down lists.

Туре_____х _____х

Contacts List View

The Contacts List View is used to overview contacts and conduct searches.

Contacts D			oard Contacts	Calendar Mail	Stock Quotations Orders Invoices Purchases Campaign Files Messaging ?
•••		000			Q O Details List
Contact #	Created	Туре		Name	Address
CB1	9/25/2009	Company	Brand	SUI Solutions	380 Hurricane Lane, Suite 201, Williston, VT, 05495, U.S.A.
CC4	9/25/2009	Company	Customer	Best Brass Toys Inc.	4466 Confederate Drive, Utica, NY, 13502, U.S.A.
IS10	10/15/2009	Individual	Staff	Miss. Lucy Mays	Ap #664-143, Nisi St., Williston, VT, 05495, U.S.A.
IR11	10/15/2009	Individual	Resource	Mr. Bob Rollins	837-6380, Aptent Av., Williston, VT, 05495, U.S.A.
IS12	10/15/2009	Individual	Staff	Mr. James Travis	934-3728, Phasellus Rd., Williston, VT, 05495, U.S.A.
CC18	10/16/2009	Company	Customer	Hanox	286-3075, Proin Avenue, West Springfield, WV, 83125, U.S.A.
CC19	10/16/2009	Company	Customer	Cornbit	4870 Deans Lane, Westbury, NY, 11590, U.S.A.
CC20	10/16/2009	Company	Customer	Ballanthem LTD	2332 Owen Lane, Fort Myers, FL, 33901, U.S.A.
CP21	10/16/2009	Company	Prospect	Dynamictons	2001 Buck Drive, South Burlington, VT, 05403, U.S.A.
CC22	10/16/2009	Company	Customer	Litobe	4952 Delaware Avenue, Sausalito, CA, 94965, U.S.A.
IC23	10/16/2009	Individual	Customer	Mr. Roger Turner	102 Werninger Street, Houston, TX, 77032, U.S.A.
CP240	10/16/2009	Company	Prospect	Affordable Promotion	3591 Hoffman Avenue, Huntington, NY, 11743, U.S.A.
IR25	10/16/2009	Individual	Resource	Chad Sheard	161 Mattson Street, Portland, OR, 97204, U.S.A.
IS26	10/16/2009	Individual	Staff	Mr. Michael Bell	4066 Duke Lane, Newark, NJ, 07102, U.S.A.
CV9	3/24/2010	Company	Vendor	SUI Solutions FM	380 Hurricane Lane, Suite 201, Williston, VT, 05495, U.S.A.
IS82	4/2/2010	Individual	Staff	Mr. Jason Burch	4333 Vestibulum. Av., Williston, VT, 05495, U.S.A.
CV3	10/27/2011	Company	Vendor	SUI Solutions Mobile	380 Hurricane Lane, Suite 201, Williston, VT, 05495, U.S.A.

Creating New Contacts

A new contact can be created by clicking **New** 😏 in several places:

- Dashboard: In the Contacts tab in Recently Changed Information Area.
- Contacts Detail View or Contacts List View: In Tool Bar
- Contacts Detail View: In the Contacts tab in Linked Items Area to create Associated Contacts.

When the **Contacts Detail View** layout appears, enter the new contact's data.

Viewing and Editing Contacts

Contacts can be viewed and edited in the **Contacts Detail View** directly by clicking **Edit/View** near the contact in several places:

- **Dashboard**: In the **Contacts** tab in the **Recently Changed Information Area** to view and edit recently changed contacts.
- Contacts List View: To view and edit a found set of contacts.
- Contacts Details View: In the Contacts tab in Linked Items Area to view and edit Associated
 Contacts

When Contacts Detail View appears, you can view and edit all properties.
Deleting Contacts

Contacts can be deleted by clicking **Delete** ⁽²⁾ in several areas:

- Contacts Details View: In Tool Bar.
- Contacts List View: To the right of the contact.

The contact will be deleted after your confirmation of the action.

Mail

The **Mail** module helps track and organize e-mail, mail and fax correspondence. A correspondence history for each contact is available to all team members. Messages can be grouped or filtered by topic to track specific conversations.

Features

• Mail Archive

Since all correspondence with clients, leads and vendors is carried out in Vedatrak, all e-mails, letters and faxes are automatically stored for future reference.

• Shared Mail

All correspondence is accessible to each database user.

• Easy Message Retrieval

All e-mails, letters and faxes are stored within the contact's card. Messages can by filtered by keyword to track specific conversations.

• Linked Tasks

Each message can be associated with a task. A sales rep can assign a task for an assistant to send a newly created fax, for instance.

• Fax and Letter Templates

Easily create formatted letters or faxes directly in Vedatrak using the templates provided with the program.

Mail Detail View

Mail Detail View is used to compose a message and edit mail properties.



Basic Properties

• Use the **Type** drop down list to specify the message type (*E-mail, Fax* or *Letter*).



• The **Sent** check box indicates the sent status of the message and is automatically checked after an e-mail is sent.



- The **From** field automatically contains the **Our Rep** name for the associated contact upon creation.
- The Company and Company # fields automatically display the recipient's company Name and Contact # upon message creation. If the recipient is an Associated Contact (for example Staff), the fields display the Parent Contact name and contact #.
- The To and Contact # fields that display the recipient contact's Name and Contact # are

generated automatically upon message creation. They can be changed by selecting a different contact from the **Contact #** drop down list (for example, another staff member in the **Company**).

- The E-mail/Fax/Address field (depending on message Type) is generated automatically upon message creation as recipient contact's E-mail, Fax or Address.
- Specify the additional addresses in the CC and BCC field if necessary.
- Manually Input the **Subject** of the message.

Outgoing Mail Body

- Compose your message in the **Outgoing** field.
- Click Spell Check with to check your message before it is sent.

Incoming Mail Body

Users may copy and paste the incoming message to the **Incoming** field if necessary to view it while writing.

Send Button

Use the **Send Button** to send a prepared e-mail. The **Sent** check box checks automatically when a message is sent.

Mail List View

Mail List View is used to overview messages and conduct searches.



Creating New Mail

New mail can be created by clicking **New** 😟 in the **Mail** tab in the **Linked Items Area** in several places:

- Contacts Detail View: To create mail for a selected contact.
- Orders Detail View: To create mail for a contact regarding an order.
- Invoices Detail View: To create mail for a contact regarding an invoice.
- Products Detail View: To create mail for a contact regarding a product.

When Mail Detail View appears, enter the data for the new message.

Viewing and Editing Mail

Mail can be viewed and edited in **Mail Detail View** directly by clicking **Edit/View** near **Mail** in several places:

- **Dashboard**: In the **Mail** tab in the **Recently Changed Information Area** to view and edit recently changed mail.
- Mail List View: To view and edit found mail.
- **Contacts Detail View:** In the **Mail** tab in the **Linked Items Area** to view and edit contact related mail.
- Orders Detail View: In the Mail tab in the Linked Items Area to view and edit order related mail.
- Invoices Details View: In the Mail tab in the Linked Items Area to view and edit invoice related mail.
- **Products Detail View:** In the **Mail** tab in the **Linked Items Area** to view and edit product related mail.

When the Mail Detail View opens, you can view and edit all mail properties.

Deleting Mail

Mail can be deleted by clicking the **Delete** button ^(S) in several places:

- Mail Detail View: In Tool Bar.
- Mail List View: To the right of mail.

Mail will be deleted after your confirmation of the action.

Mail Preferences

Use **Mail Preferences** to manage default Mail settings. To change preferences, click the **Preferences** button in <u>User Info</u>.

Signature above	Best regards.	
Signature scan		
Signature below	Sincerely yours.	

Calendar

The **Calendar** module helps users plan events, meetings and tasks with the ability to link work to a database contact. Calendar supports team interaction by allowing users to view, comment on and assign each other's appointments. Calendar provides e-mail notifications, multiple calendar views, an expired appointments view and more.

Features

The Calendar module includes the following features:

- **Multi-user Environment** Users are able to assign tasks and appointments to other team members and themselves.
- Quick find
 The convenient find field in Calendar searches the full database for criteria matches.
- Simple time tracking and subtasks

Original estimate and work log for tasks and subtasks.

• Single or Recurring Appointments

Appointments can be scheduled singly or with daily, weekly, monthly or yearly recurrences.

• Alternative Calendar Views

Schedules can be viewed in daily, weekly, monthly, yearly and plain list overviews with corresponding levels of detail, each with the option for a quick view of any single day.

• Editable Appointment Categories

Task, Event and Meeting (etc.) categories help make sense of different appointments.

Expired Appointments Quick View

A quick view of expired appointments in red text helps prevent tasks from being overlooked.

• E-Mail Notification System

Users can elect to receive e-mail notifications to track newly assigned appointments and progress on existing appointments.

• Linked Tasks

A variety of database objects can be linked to tasks. A sales rep can assign a task for an assistant to send a newly created fax, for instance.

Show completed

Calendar Day View

Calendar Day View, using the Appointments Filter, shows appointments for the Selected Date (today is the default), Expired Appointments and Calendar Navigation Component.

0	0						Vec	latrak Cal	endar			_	_		_		_		_
FS	ele	cte	d Date		Dashboa	ard Cor	ntacts Calendar Mail	Stock	Quotatic	ons Orde	rs Invoices	Purc	hases	Campa	aign	Files	Mes	saging	?
0	0	0	Shor Ap	poinme	nts Filt	er		9	D	ay	Week		Month	1	1	<u>'ear</u>		List	ţ.
Ð	Dai		ppointm														nents	s (0)	
0	25	•	Assigned by Bob	Start date 1/1/2010	Due date 1/1/2012	event	Title Grandma birthday				Completed	4		Due date	т	tle			*
0	<u>27</u>	•	Bob	1/1/2010	1/1/2012	Task	Purchase new license				0								
>	32	•	Bob	1/1/2010	1/1/2012	Meeting	Club discussion				0		1	хрі	red	App	oinn	1e nt	S
0	<u>37</u>	•	Bob	1/1/2010	1/1/2012	Task	Write a review				V 🔇								
>	38	0.	Bob	1/1/2010	1/1/2012	Task	Read the bill				V 🔕								
>	<u>21</u>	•	Bob	1/1/2010	1/1/2012	Meeting	Team meeting				0								-
					Da	ally A	ppontments						📢 🍕 Sun) . Mon	Janı _{Tue}		2010 Thu	Fri	Sat
												Ш	27	28	29	30	31	1	2
												1	3	4	500	len.	7 lar	8	9
												Ш	10	11	Na	viga	tion nent 21	15	16
													17						23
													24 31	25	26	27	28 4	29	30
												J		1 w occu	2 pied da	3 ys	4	5	6
F	riday,	Januar	ry 1, 2010							User: a	ıdmin / System A	Admini	-	Pro	////		ences	<u>Re-</u>	login

Selected Date

Selected Date is displayed at the top of the page. You can change Selected Date using the Appointments Filter or the Calendar Navigation Component.

Appointments Filter

• Switch between days using the **arrows** or the **Today** button.



- Use the Show Completed check box to show or hide completed appointments.
- Appointments for the current user are shown by default. To view other users' appointments, select the user from the Assigned to drop down list or click All to display appointments for all

users. Bob Rollins V | All

Daily Appointments

Daily Appointments are displayed only for the **Selected Date.** Users may add, edit, complete and delete appointments.

Calendar Navigation Component

In the **Calendar Navigation Component**, today's date is highlighted in pink while the selected day is highlighted in blue (if not coinciding with today):

📢 🍳 Sun) Mon			2010 Thu		Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Show occupied days

- Switch between months using **Previous month** and **Next month**
- Switch between years using **Previous year** and **Next year** .
- Check the Show occupied days check box to view dates containing appointments as <u>underlined</u>.

Show occupied days

Expired Appointments

Expired appointments are shown in red and displays appointments that were not completed on time (Finish/Due date < Today).

Hold new agreement

Calendar Week View

Calendar Week View, using the Appointments Filter, shows weekly appointments, including the Selected Week (today's week is the default), Daily Appointments and the Calendar Navigation Component.

0	0	0	Show c	ompleted			▼ <u>Me</u>	0	-								
9	-	9					•		<u>Day</u> W	leek	Moi	<u>nth</u>	7	<u>(ear</u>		Lis	Ł
Co ₩ Ne	ntac	t John review tions	for details	+ Mo Create a pr & Fill form	nday 20	Crea Rep Hold	Tuesday 27 ate a project plan air boat d new agreement d the bill	Wednesday Create a project plan Repair boat Read-the-bil Finish up with ag Club discussion	Nursday Buy commercial ve Create a project pl Repair boat Repair boat Finish up with & Club discussion Follow up with new & 100 PM Team mee & 6:00 PM Contact ap	an () F && () & () F v client ting		ussion birthday	30 rsion or	Buy	Satu		31 sion or
Ð	Da	ily A		ments (9) _{Start date}	Due date		Title		Co	mpleted	€ Su		Decei Tue	nber _{Wed}	201 Thu		▶ ₩ Sat
>	20	Ŧ	Bob	12/29/2011	1/20/2012) Task	Buy commercial ver	sion of Vedatrak		<u>()</u>	27		29	30	1	2	3
)	<u>23</u>	•	Bob	12/25/2011	12/29/2011) Task	Create a project plan	n		8	4	5	6	7	8	9	10
>	<u>29</u>	•	Bob	12/27/2011	12/29/2011) Task	Repair boat			8	11	12	13	14	15	16	17
>	38	•	Bob	12/27/2011	12/29/2011) Task	Read the bill			8	18		20	21	22	23	24
>	31	•	Bob	12/28/2011	12/30/2011) Task	Finish up with docu	mentashin		8	2	26	27	28	29 5	30	31
\$	32	•	Bob	12/28/2011	12/30/2011	Meeting	Club discussion			8		Show occ			5	6	7

• Switch between weeks using arrows or the Today button with the Appointment Filter.



• To open Day view for a chosen day, click the date in Week View.



Calendar Month View

Calendar Month View, using the **Appointments Filter**, shows appointments for every day of the month, including the **Selected Date** (today is the default). This view is convenient for finding an unoccupied day to set an appointment.

		Vedatrak Calendar			\bigcirc
December 2011 Dashi	ooard Contacts Calendar	Mail Stock Quot	tations Orders Invoice	s Purchases Campaign	Files Messaging ?
Show completed	▼ <u>Me</u>	0	Day Week	Month	Year List
Sunday 27 Monday 22 Follow up with new clience Follow up with new clience		Wednesday 30 Follow up with new client	• Thursday 1 Follow up with new clieft	Friday 2	• Saturday 3
Sunday Sunday Follow up with new client Follow up with new client		Wednesday 7 Follow up with new clienc	• Thursday 8 Follow up with new clieft	Friday 9	• Saturday 10 Follow up with new client
Sunday 11 Monday 11 Follow up with new client Follow up with new client	Follow up with new client	Wednesday 14 Follow up with new clience	Follow up with new clieft	Friday 16	Saturday 17 Follow up with new clien:
Sunday 18 * Monday 1 Follow up with new clience Follow up with new clience		Wednesday 21 Follow up with new clienc	• Thursday 22 Follow up with new cliehr		• Saturday 24
Sunday 25 + Monday 2 Follow up with new clich- Create a project plan Contact John for details White a review Sunday 2 Create a project plan Atherefull form	Follow up with new client Create a project plan Repair boat	Create a project plan Repair boat	Follow up with new client	Friday 30 Buy commercial version or Follow up with new client Finish up with Club discussion	Saturday 31 Buy commercial version or Follow up with new client
Sunday Buy commercial version w Follow up with new client Follow up with new client	Buy commercial version or			Friday 6 Buy commercial version or Follow up with new client	Saturday Saturday Saturday Follow up with new client
Thursday, December 29, 2011	_	_	User: Admin / Syster	n Administrator <u>Profile</u>	<u>Preferences</u> <u>Re-login</u>
00 🖬 🖬 Browse					

• Switch between months using arrows or the Today button in the Appointment Filter.



• To open the Day view for a chosen day, click on the date in Month View.



Calendar Year View

Calendar Year View, using the **Appointments Filter**, shows appointments for every day of the year, including the **Selected Date** (today is the default). This view is convenient for finding an unoccupied day to set an appointment.

00		Vedatrak Calendar		
2011	Dashboard Contacts Calen	dar Mail Stock Quotations Or	rders Invoices Purchases Campaign File	es Messaging ?
Show completed	▼ <u>Me</u>	Q Day	Week Month Year	List
Sunday 20 *	Monday 21 S Tuesday	22 😌 Wednesday 23 🔍 The	ursday 24 * Friday 25 *	Saturday 26
20	21 0 10000		24 0 1103	20
Sunday 27 Solow up with new cliens	Monday 28 Tuesday w up with new client Follow up with new client		with new client Follow up with new client Follow up with new client	Saturday 3 llow up with new client
		November 2011 Decem	lber 2011	
Sunday 4 Follow up with new client	Monday 5 Tuesday		ursday 8 Friday 9 0 with new client 6 Follow up with new client 6 Follow up with new client	Saturday 10 llow up with new client
Sunday 11 Sector	Monday 12 Tuesday wup with new client To Follow up with new client		ursday 15 Friday 16 Ministry 16 Follow up with new client	Saturday 17 llow up with new client
0	0	0	0	
😌 Sunday <mark>18</mark> 😷	Monday 19 😷 Tuesday		ursday 22 😷 Friday 23 🔮	Saturday 24
C Follow up with new client C Follow	w up with new clien 🗍 Follow up with new clie	hc Follow up with new clienc Follow up	with new client D Follow up with new client Follow	llow up with new clienc
Sunday 25 *	Monday 26 * Tuesday	27 * Wednesday 23 * Th	ursday 29 🐮 Friday 30 🔹	Saturday 31
Create a project plan Follow up with new client	e a project plan w up with new client	Create a project plan Buy comment	am meeting Follow up with new client	y commercial version or llow up with new client
Contact John for details Write a review	rm 📋 Repair boat	Repair boat Greate a pr Finish up with Follow up	roject plan 💉 Grandma birthday D	ecember 2011
Thursday, December 29, 2011		Use	r: Admin / System Administrator <u>Profile</u> <u>Pre</u>	ferences <u>Re-login</u>
Browse				

• Switch between years using arrows or the Today button in the Appointment Filter.



• To open the **Day view** for a chosen day, click on the date in **Month View**.



Calendar List View

Calendar List View, using the **Appointments Filter**, shows appointments as list. This view is very convenient for finding and viewing appointments by some criteria.

Dece	mber 29		Dashboard	Contacts	Calendar	Mail	Stock	Quotations	Orders	Invoices	Purchases Camp	aign Files	Messaging	?
	D D 🖌 Show co	ompleted		▼ <u>Me</u>			9	Day		Week	Month	<u>Year</u>	List	
#	Assigned to	Start date	Due date	Title						Comple	ted			
20	Jason	12/29/2011	1/20/2012	🗋 Buy	commercia	I version o	of Vedatra	ak						
21	Bob	12/29/2011	12/29/2011	🖧 Tear	n meeting									
23	James	12/25/2011	12/29/2011	Crea	te a projec	t plan								
24	Lucy	12/29/2011	12/29/2011	Follo	ow up with	new client								
25	Bob	12/30/2011	12/30/2011	🦛: Gran	ndma birthd	lay								
26	Jason	12/29/2011	12/29/2011	🔒 Cont	tact approv	al								
28	Jason	12/26/2011	12/26/2011	👬 🔒 Fill f	orm									
29	Jason	12/27/2011	12/29/2011	🗋 Repa	air boat									
30 🔾	Lucy	12/27/2011	12/27/2011	🗋 Hold	l new agree	ment								
31 🔾	Lucy	12/28/2011	12/30/2011	📋 Finis	sh up with c	documenta	shin							
32	Bob	12/28/2011	12/30/2011	👬 Club	discussion	n								
33 🕄	Lucy	12/25/2011	12/25/2011	Cont	tact John fo	or details								
37	Bob	12/25/2011	12/25/2011	🗍 Write	e a review									
38	Bob	12/27/2011	12/29/2011	C Read	d the bill									
44	Lucy	12/30/2011	12/30/2011	C Refr	esh the list									
45	James	12/25/2011	12/25/2011	New	options									
2 48	Jason	12/25/2011	12/25/2011	C Pron	note all									

Creating New Appointments

New appointments can be created by clicking **New** 👥 in several places:

- Calendar Day View: In Daily Appointments to create an appointment for the selected day.
- Week View, Month View and Year View: Near the particular day.
- Dashboard: In Daily Appointments to create an appointment for today.
- Contacts Detail View, Mail Detail View, Mail List View, Files Detail View, Orders Detail View, Invoices Detail View and Products Detail View: In the Calendar tab in the Linked Items Area to create a linked appointment.

The New Appointment window opens:

0					New Appointment					
ant improve this lay	ent # 13	_					_	_		?)
	_	-		_	_					
Close						Repeat	every	1	▼ days	
							. 🖸	Custom	Propertie	s
Title	Task	-			T 1	Assigned by Luc				
Priority			Start date 1/10/2012		Time					
			Finish/Due date 1/10/2012		Time	Estimation	76			
Assigned to	Bob Rollins James Trav	vis								
Unselect all	Jason Burc	ch								
	Lucy Mays System Ad	ministr	ator							
			ator							
Notes (0)	C. Marsha (D)		Madel as (0) Deletions (0)							
	Subtasks (0)		Work Log (0) Relations (0)	Note				_		
	Subtasks (0)			Note			_	_	_	
	<u>Subtasks (0)</u>	_	Created !	Note				_	_	
	Subtasks (0)		Created !	Note				_	_	
Notes (0) scription	<u>Subtasks (0)</u>	_	Created !	Note					_	-
	<u>Subtasks (0)</u>		Created !	Note	_					-
	<u>Subtasks (0)</u>		Created !	Note						
	<u>Subtasks (0)</u>		Created !	Note						-
	<u>Subtasks (0)</u>		Created !	Note						
	<u>Subtasks (0)</u>		Created !	Note						
	<u>Sublasks (0)</u>		Created !	Note						
	Sublasks (0)		Created !	Note						

- The **Title** field is visible in all views.
- The **Type** field is shown before the title as an icon. Different icons are used to represent each appointment type.

📋 Task 🛛 🔐 Meeting Évent

- Start date, Finish/Due date, Start time, and Finish time can be defined and are visible in all views.
- Select Assigned to users for the appointment.

54 | Calendar



• Use the **Repeat every** feature to specify the frequency at which the appointment should recur.

Repeat every 1 V days V

• Specify Priority. The default priority is *Medium*.

```
Priority 💡 💡 🖡
```

Click the Close button
 Close to save the appointment and close the window.

Viewing and Editing Appointments

Appointments can be viewed and edited in several places:

- Calendar Day View and Dashboard: Click Edit/View
 ear the appointment.
- Week View and Month View: Click the appointment.
- Contacts Detail View, Mail Detail View, Mail List View, Files Detail View, Orders Detail View, Invoices Detail View and Products Detail View: In the Calendar tab in the Linked Items Area,

click **Edit/View O** near the appointment to view and edit linked appointments.

The Edit Appointment window opens:

		Delete
Title	Contact John for details	Custom Properties
Туре	🖹 Task 🔻 Start date 12/25/2011 🗏 Time Assigned by Bob	
Priority	Finish/Due date 12/25/2011 Time Estimation	
Select all	□ Bob Rollins □ James Travis □ Jason Burch ⊠ Lucy Mays □ System Administrator	
# As	+ Subtasks (1) + <u>Work Log (0)</u> ssigned to Start date Due date Title	
12	Bob 1/10/2012 1/10/2012 Cell John	
		_
Brow		

Creating Subtasks

Open the appointment where you would like to create a subtask. Click **New •** in the **Subtasks** tab in the **Edit Appointment** window.

00				Edit Appointment			_
Appointme	ent # 33						?
Close						D	elete
Title C	Contact John for	details				😌 Custom Prope	rties
Туре 📋	🖱 Task 🛛 🔻	Start date 1	2/25/2011	Time	Assigned by Bob		
Priority	: :	Finish/Due date 1	2/25/2011	Time	Estimation		
Unselect all	James Travis Jason Burch Lucy Mays System Adminis	strator					
Notes (0)	Subtasks (1) 🕂	Work Log (0) Relati	ions (0)				
# Assig	igned to Sta	rt date Due date	Title				
# Assig	igned to Sta						_
# Assig	igned to Sta	rt date Due date	Title	_			
# Assig	igned to Sta	rt date Due date	Title	_			
# Assig	igned to Sta	rt date Due date	Title				
# Assig	igned to Sta	rt date Due date	Title				
# Assig	igned to Sta	rt date Due date	Title				
# Assig	igned to Sta	rt date Due date	Title				
# Assig	igned to Sta	rt date Due date	Title				

Click the **Close** button **Close** to save the appointment and close the window.

Deleting Appointments

Appointments can be deleted in several places:

- Calendar Day View and Dashboard: Click Delete 🥙 to the right of the appointment.
- Open the appointment to <u>edit</u> and click the **Delete** button.

Delete

The appointment will be deleted after your confirmation of the action.

Note: Users may only delete appointments that they've created.

Completing Appointments

Appointments can be marked as completed in several ways:

- Calendar Day View and Dashboard: Click the Completed check box appointment
- Open the appointment to <u>edit</u>, then check the **Completed** check box Completed at the top of the window.

If <u>e-mail notifications</u> are activated, the notification will be sent immediately after completing the appointment.

Calendar Preferences

Calendar Preferences allow users to change some graphics and set global options. To change the preferences, click the **Preferences** button in <u>User Info</u>.

Start v	week on Mond	day	E-mai	I me about ne	w appoint	ments assigned to me		Appointment types (3)	
Show	occupied day	/S						Туре	Graphics	
Show	completed		E-mai	i me about up	dates in a	ppointments assigned by me	50	Task	Ô	6
Show	only own			ue Wed Thu Fr			3	Event	se an	6
appoir	ntments for u	sers			V We	ekend Days	97	Meeting	<u>m</u> e	6
Graphic	cs									
Low	Medium	High	Today	Selected day	Current	Another month				
0	•									

Calendar Options

- Check the Start week on Monday check box for setting Monday as the first day of the week.
- Check the Show occupied days check box to view days with appointments as <u>underlined</u> in the <u>Calendar Navigation Component</u>.
- Use the Show Completed check box to show or hide completed appointments.
- Use the check boxes for e-mail notifications to remind other users and yourself about created, completed or commented appointments

E-mail me about new appointments assigned to me

E-mail me about updates in appointments assigned by me

Note: In order to receive these e-mail notifications, your e-mail address must be included in your <u>User Profile</u>.

Graphics

Note: These features are limited to the System Administrator and Administrator.

- Calendar backgrounds (Today, Selected day, Current month, Another month).
- Priority type icons (Low, Medium, High).

Appointment Types

Note: These features are limited to the System Administrator and Administrator.

• To add a new appointment type, click New 😫.

60 | Calendar

- Select the <u>MultiLang</u> Label Id from the # drop down list and insert the picture in the **Graphics** field.
- Click **Delete Output** near the type to delete.

Stock

The **Stock** module allows you to organize your company's products and services in an easy to navigate catalog that saves you time by storing data associated with each product. Use this module to add products onto an order.

Features

Tree View

All products can be organized using different categories or markets in an easy to use tree format.

Shared Products

All products can be accessed by each team member.

• Dynamic Product Quantity

Your Stock quantity is always actual. Increases at Purchase Order creation, decreases at Sales Order creation.

• Reorder point

Be aware of low stock quantity. Make your purchase in time.

• Price matrix

Price matrix allows you define up to 4 price levels for different kind of customers and unlimited ordered quantity ranges for each level. Your price-list has never been so flexible.

• Multiple vendors

You can define several vendor contacts for each product. Store actual prices of all vendors and just select the best one.

Product Properties

All products have basic properties such as: *Category*, *SKU*, *Name*, *Picture* and price levels. Additional custom properties may be added any time.

• Linked Tasks

Each product can be linked to a task in the **Calendar** feature. A manager, for instance, can schedule a meeting regarding a product with a group of sales reps.

Stock Catalog View

Stock Catalog View allows users to organize products using different categories in an easy to use tree format.

00			_	Vedatrak	Stock							_
Stock	Dashboard Contacts	Calend	ar	Mail Stoc	k Quotations	Orders	Invoice	s Purcha	ses Campaign	Files	Messaging	?
X 8 6						90		Catalog	Detai	ls	List	
Categories		d	۲	Template	s						Stock qty	
🖻 STOCK		^	0	SUI Calendar S	tandard							🙆 🗅
오 🖻 FileMaker apps		8	0	SUI Calendar A	dvanced						995	8
Templates		8	0	SUI Calendar D	eveloper						1000	0
Vedatrak		8	0	SUI Bulletin Boa	ard Unlimited							8
iPhone apps		8	9	SUI Bulletin Boa	ard Developer						1000	8
			9	SUI Forum Unli	mited							8
				SUI Forum Dev								8
Categori	es Area		9	SUI Message B	oard Unlimited	F	Produ	cts Are	a			8
			9	SUI Message B	oard Developer						1000	8
		_										_
		_										_
		_										_
						User: adm	nin / Syste	m Administr	ator <u>Profile</u>	<u>Prefere</u>	nces Re-	login
Browse												

Categories Area

The Categories Area displays information about categories in a hierarchical format.

- To create a new category, click **New** 🕙 and enter the category name.
- To edit a category, click **Edit/View** next to the category.
- To delete a category, click **Delete** ⁽²⁾ to the right of the category.
- To sort the categories, use the **Sort Custom** button and use the **arrow** buttons to arrange the category list.
- Use Cut, Copy and Paste buttons in the Tool Bar to change the position of categories in the list.

Products Area

The Products Area displays information about products in each selected category.

- To create a new product in a selected category, click New 🛄.
- To edit a product, click Edit/View Section next to the product.

- To delete a product, click **Delete** to the right of the product.
- To display prices at different quantity breaks, use the Level Price drop down list.
- Use Cut, Copy and Paste buttons in the Tool Bar to copy or move the products.

Stock Detail View

Stock Detail View allows users to review and edit product information.

			Veda	trak Stock					
Stock		Dashboard Contacts	Calendar Mail	Stock Qu	otations Orders Inv	voices Purchases	Campaign File	s Messag	ing ?
••		8			00	Catalog	Details	List	
Created 3 ColorEyes	3/24/2010 3:02:42 PM by S	Moc	lified 10/28/2011 4:45:24 PM	by <u>Admin</u>		iPhone apps	Custon	n Propert	ies
SKU	A5		5	Old	Picture	20.9 KB			
-		ile	Reorder point 100	v Purchases (0)	Files (0)				
		ipany					the la sector	Primary	
Vendor							Unit price		
Vendor CV3	SUI S	Solutions Mobile				_	\$1.00	V	8
	SUI S	Solutions Mobile							
		Solutions Mobile			Us	er: Bob / Bob Rollins	\$1.00		Xe-login

- Enter the basic product details like Name, SKU and Description.
- Include the product's **Picture** and **Web** address if desired.
- To specify the product's **Vendor**, click **New** in t the **Vendor** tab int he **Linked Items Area**. Then select the vendor from a list of contacts that are **Vendors** in the <u>Contacts</u> database.
- You can enter up to four **Price Levels** for each product.

Stock List View

Stock List View is used to view and search the products in the database.

Stock	Dashboard Contacts Caler	dar Mail <mark>Stock</mark> Quotation	ns Orders	Invoices Purchases	Campaign Files	Messaging	?
0000			00	Catalog	Details	List	
SKU	Product	Category			Stock qty	Old	
シ S1S	SUI Calendar Standard	Templates			1000		8
🜍 S1A	SUI Calendar Advanced	Templates			995		0
🕥 S1Dv	SUI Calendar Developer	Templates			1000		8
VBP	Vedatrak Base Pack	Vedatrak			990		8
😡 VM1	Vedatrak Mail	Vedatrak			0	V	8
VM2	Vedatrak Files	Vedatrak			999		8
VM3	Vedatrak Products	Vedatrak			1000		8
🛇 VM4	Vedatrak Orders	Vedatrak			1000		6
VM5	Vedatrak Invoices	Vedatrak			1000		8
VM6	Vedatrak Messaging	Vedatrak			326		0
A2	Flatter Me	iPhone apps			1000		8
🕥 A3	Password Assistant	iPhone apps			1000		8
🕥 S2U	SUI Bulletin Board Unlimited	Templates			999		8
S2Dv	SUI Bulletin Board Developer	Templates			1000		8
😜 S3U	SUI Forum Unlimited	Templates			0	V	8
S3Dv	SUI Forum Developer	Templates			92		8
🕥 S4U	SUI Message Board Unlimited	Templates			1000		8
S4Dv	SUI Message Board Developer	Templates			1000		8
😜 A4	Make a Face	iPhone apps			0	V	8
🛇 A5	ColorEyes	iPhone apps			1000		0
🕥 A6	iMarkup	iPhone apps			1000		8
Record: 11 / 22 (To	otal: 22)	User: Bob / Bob Rollin	5		Profile Prefere	nces Re-k	nain

Creating New Products

New products can be created by clicking **New** 至 in several places:

- Stock Catalog View: In the Products Area to create a product in the selected category.
- Stock Detail View and Stock List View: To create a product in the most recently viewed category.

When the Stock Detail View window appears, enter information for the new product.

Viewing and Editing Products

Products can be viewed and edited in the **Stock Detail View** directly or by clicking **Edit/View** next to the product in several places:

- **Dashboard**: In the **Stock** tab in the **Recently Changed Information Area** to view and edit recently changed products.
- Stock Catalog View: To view and edit products in the selected category.
- Stock List View: To view and edit a found set of products.
- Orders Detail View: In the Items tab in the Linked Items Area to view and edit order related products.
- Invoices Detail View: In the Items tab in the Linked Items Area to view and edit invoice related products.

When the Stock Detail View appears, users may view and edit all properties.

Deleting Products

Products can be deleted by clicking **Delete** ⁽²⁾ in several places:

- Stock Catalog View: In the Products Area to the right of the product.
- Stock Detail View: In the Tool Bar.
- Stock List View: To the right of the product.

The product will be deleted after your confirmation of the action.

Stock Preferences

Use **Stock Preferences** to manage default **Products** settings. To change preferences, click the **Preferences** button in <u>User Info</u>.

Products Options
Show count of products for each category

• Check the **Show count of products for each category** box to display the number of products for each category in the **Categories Area** in **Stock Catalog View**.

Quotations

The **Quotations** module supports the sales process by tracking quotes history. Provides sales quote with appropriate prospects or customers price level.

Features

Shared Quotes

All Quotes are accessible by each team member.

• Simple Quote retrieval

All quotes are linked to the corresponding contact and can be easily found within the contact's card.

• Two clicks Order creation

After Quote is signed make new Order just in two clicks. Editing ability of product list before Order creation is also provided.

• Linked Appointments

Each quote can be linked to a task. A sales rep can assign a task for an assistant to send a newly created fax, for instance.

Quotations Detail View

Use Quotations Detail View to enter basic information for the selected quotations.

O	000 0	00 0					00	Details List
Created 10/2 Q1110271.	7/2011 6:40:18 PM	iy <u>Admin</u>	Modifie	ad 10/27/2011 6:40:18	PM by Admin	SUI Solu	tions 🔻	Custom Properties
Serial No Customer #	CC4			Our Rep. Lu	cy 🔻	Date 10/27		
Name Address	4466 Confederat	Basic Pr		Davis				Totals Sales Total 360.00
City/State/Zip Country			NY	13502				Discount 10% - 36.00 Quotation Totals 00
ustomer PO #	2% 14;Net 30	Ship n	nethod					Tax 6% ✓ + 19.44 Est. Shipping + 0.00 Total, USD 343.44
Items (3)	Notes (0)	Calendar (0)	Mail (0)	Orders (1)	Files (0)			
	Name				Category	Unit price Qu	ntity	Line total, USD
SKU		Pack			Vedatrak	280.00	1	280.00 🥝 -
SKU VBP	Vedatrak Base					40.00	1	40.00 🥝
100000	Vedatrak Base Vedatrak Prod	ucts			Vedatrak			
VBP				Quotatio	Vedatrak Vedatrak On Items	40.00	1	40.00 🥸

Basic Properties

- A unique Quotation **#** is generated automatically upon order creation. Users may change the field if necessary.
- If your company operates more than one **Brand**, select the appropriate brand from the drop down list.
- A unique **Serial No** is generated automatically upon order creation.
- To change the sales rep associated with the order, click the **Arrow** button next to the **Our Rep** drop down list. The names in the list are a product of the specified **Brand**.
- Customer information like **Customer #**, **Company**, **Name**, **Address**, etc. is populated automatically upon order creation.
- Select a shipment method from the Ship Method drop down list.
- Users may add additional Ship Methods if necessary. Click the Edit... option in the drop down list. In the Edit Value List dialog box, type each method on a separate line in the order you would like them to appear and click OK.
- The **Date** is generated automatically upon order creation.
- Set the order's status using the Status drop down list.

• The Invoiced and Paid fields are generated automatically using values in the related Invoice.

Quotation Items

The Quotation Items area displays product information for the order, like quantities and prices.

• To add a new item click **New** in the **Items** tab. If the <u>Stock</u> is installed, the **Select product** window appears. You may select an existing product from the product catalog.

00	Ve	latrak Stock	
Select product - SUI B	ulletin Board		
Quantity 1 Ok	Cancel		00
Categories	J Templat	es	
STOCK	SUI Calenda	Chandrad	Stock qty
FileMaker apps	SUI Calenda		995
Templates	SUI Calenda		1000
Vedatrak		Board Unlimited	999
iPhone apps		Board Developer	1000
	SUI Forum D	eveloper	92
	SUI Message	Board Unlimited	1000
	SUI Message	Board Developer	1000
	*		Ţ
Browse			

Click the **Delete** button ⁽²⁾ to delete the item.

Quotation Totals

- Sales Total is calculated automatically as the sum of all order items.
- **Discount** is generated automatically upon order creation using the customer's **Discount** value. To disable **Discount**, click the corresponding check box.
- Subtotal is calculated automatically using Sales Total and Discount.
- The **Tax** field is generated automatically on order creation using the **Tax** field from <u>Quotations</u> <u>Preferences</u>. You can disable **Tax** by clicking the corresponding check box.
- Use the **Est. Shipping** field to enter the shipping charge.
Quotations List View

Quotations List View is used to view and search for quotations.

00			veua	trak Quo	tations					_		
Quotations		Calendar	Mail	Stock	Quotations	Orders	Invoices	Purchases	Campaign	Files	Messaging	?
								00	Detail	<u>s</u> (List	
Quotation	Date	Contact #		Name							Total, USD	
Q1110271.CC4	10/27/2011	CC4		Best Br	ass Toys Inc.						343.44	0
Q1110282.CC4	10/28/2011	CC4		Best Br	ass Toys Inc.						9.00	8
Q1110283.CC19	10/28/2011	CC19		Combit							1584.70	0
Q1110284.CC20	10/28/2011	CC20		Ballanti	hem LTD						1082.00	8
Record: 1 / 4 (Total: 4)						User: Adm	in / System	Administrato	r <u>Profile</u>	Prefere	ances <u>Re-lo</u>	gin

Creating New Quotations

New quotations can be created by clicking the **New** in the **Quotations** tab in **Linked Items Area** in **Contacts Detail View**. Fill in the new quotation's data when the **Quotations Detail View** appears.

Viewing and Editing Quotations

Quotations can be viewed and edited in **Quotations Detail View** directly by clicking **Edit/View** next to the quotation in several places:

- **Dashboard**: In the **Quotations** tab in **Recently Changed Information Area** to view and edit recently changed quotations.
- **Contacts Detail View:** In the **Quotations** tab in the **Linked Items Area** to view and edit contact related quotations.
- Quotations List View: to view and edit a found set of quotations.

When Quotations Detail View appears, users may edit all aspects of an quotation.

Deleting Quotations

Quotations can be deleted by clicking **Delete** ⁽²⁾ in several places:

- Quotations Detail View: In the Tool Bar.
- Quotations List View: To the right of the order.

The quotation will be deleted after your confirmation of the action.

Quotations Preferences

Quotations Preferences allows the <u>System Administrator</u> to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in <u>User Info</u>.

Quotations Options			
🖌 Tax : 6 %			
Discount			
Quotations Prefix	Q		
Footer			

- Check the **Tax** box and enter the tax value to enable tax calculation on quotations.
- Check the **Discount** box to enable the discount calculation on quotations. The discount will be automatically applied on quotations created using the customer's **Discount** value.
- Use the **Quotation Prefix** field to enter the value that will be used as the prefix in the **Quotation** # field.
- Use the **Footer** field to enter any additional information that will be used as the footer in all printed quotation forms.

Orders

The **Orders** module supports the sales process by tracking order history and organizing data for each sale, including associated costs and sell prices.

Features

Shared Orders

All orders within the database are accessible to each team member.

• Order Properties

All orders have a set of standard properties that are included with the software. Additional custom properties may be added at your discretion.

• Simple Order Retrieval

All orders are linked to their corresponding contact and can be easily found within the contact's card.

• Linked Tasks

Each order can be linked to a task. A sales rep can assign a task for an assistant to send a newly created fax, for instance.

Orders Detail View

Use Orders Detail View to enter basic information for the selected order.

00				_	_	Ved	atrak Or	ders	_	_			_	
Orders	000	★⊘⊜		Contacts	Calendar	Mail	Stock	Quotation	s Orders	Invoices	Purchase	s Campaign	_	ssaging ?
Created 10/	28/2011 5:46:29 4.CC20	PM by Bob		Modifi	ed 10/28/2011	5:46:29 PM	by Bob		SU	JI Solutions	•	🕒 🕒 Custo	om Prop	
Serial No <u>Customer #</u> Company		LTD				ep. Jason ons Q1110		v 20	Status Invoiced					
Name Address City/State/Zip	2332 Owen	Daniel Lane		Basic	Proper	ties			Paid	No		Totals Sales		995.00
Country Customer PO #	U.S.A.		Ship me	thod	*							Discount Tax Est. Shi Order Total	6%	+ 0.00 + 0.00 + 0.00 995.00
Items (1)	• Notes (0)	Calenda	ar (0)	Mail (0)		es (1) 🕒	Purchase	<u>s (0)</u> 🕂 E	les (0)					
SKU	Name						Categ	jory	Unit pri	ice Quantit	y Invoice	d Baiance	Line to	tal, USD
S1A	SUI Cale	andar Advanced					Temp	ates	199	.00	5	5 0		995.00
					0	rder It	ems							
Record: 4 / 6 (T	otal: 6)								User: adr	min / System /	Administrat	or <u>Profile</u>	Preferences	Re-login

Basic Properties

 A unique Order # is generated automatically upon order creation. Users may change the field if necessary.

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 If your company operates more than one Brand, select the appropriate brand from the drop down list.

SUI Solutions

- A unique **Serial No** is generated automatically upon order creation.
- To change the sales rep associated with the order, click the **Arrow** button next to the **Our Rep** drop down list. The names in the list are a product of the specified **Brand**.
- Customer information like **Customer #**, **Company**, **Name**, **Address**, etc. is populated automatically upon order creation.
- Select a shipment method from the Ship Method drop down list.
- Users may add additional Ship Methods if necessary. Click the Edit... option in the drop down list. In the Edit Value List dialog box, type each method on a separate line in the order you would like them to appear and click OK.

80 | Orders



- The **Date** is generated automatically upon order creation.
- Set the order's status using the Status drop down list.



• The Invoiced and Paid fields are generated automatically using values in the related Invoice.

Order Items

The Order Items area displays product information for the order, like quantities and prices.

• To add a new item click **New** • in the **Items** tab. If the <u>Stock</u> is installed, the **Select product** window appears. You may select an existing product from the product catalog

Quantity 1 Ok	Cancel		0.0
Categories	d	Templates	
STOCK	<u>^</u>	SUI Calendar Standard	Stock qty 1000
FileMaker apps		SUI Calendar Advanced	995
Templates		SUI Calendar Developer	1000
Vedatrak		SUI Bulletin Board Unlimited	999
iPhone apps		SUI Bulletin Board Developer	1000
		SUI Forum Developer	92
		SUI Message Board Unlimited	1000
		SUI Message Board Developer	1000
	*		

Click the Delete button to delete the item.
 Note: An item may not be deleted if it has been Invoiced.

Order Totals

- Sales Total is calculated automatically as the sum of all order items.
- **Discount** is generated automatically upon order creation using the customer's **Discount** value. To disable **Discount**, click the corresponding check box.
- Subtotal is calculated automatically using Sales Total and Discount.
- The **Tax** field is generated automatically on order creation using the **Tax** field from <u>Orders</u> <u>Preferences</u>. You can disable **Tax** by clicking the corresponding check box.
- Use the Est. Shipping field to enter the shipping charge.

Orders List View

Orders List View is used to view and search for orders.

0	rders	Dashboard	Contacts Calendar Mail	Stock Quotations Orders	Invoices Purchases	Campaign Files	Messaging	?
	0000	• • •			00	Details	List	
	Order #	Date	Contact #	Name			Total, USD	
0	SO1110281.CC4	10/28/2011	🕤 CC4	Best Brass Toys Inc.			324.00	0
0	SO1110282.CC4	10/28/2011	CC4	Best Brass Toys Inc.			8.59	8
0	SO1110283.CC19	10/28/2011	CC19	Combit			1584.70	0
Ð	SO1110284.CC20	10/28/2011	CC20	Ballanthem LTD			995.00	8
0	SO1110285.CC20	10/28/2011	CC20	Ballanthem LTD			116.00	0
0	O1110286.IC23	10/28/2011	IC23	Mr. Roger Turner			420.82	8
	Record: 1 / 6 (Total: 6)				User: Bob / Bob Rollins	Profile Prefere	nces Re-lo	ain

Creating New Orders

New orders can be created by clicking the New in the Orders tab in Linked Items Area in Contacts Detail View or Quotations Detail View. Fill in the new order's data when the Order Detail View appears.

Viewing and Editing Orders

Orders can be viewed and edited in **Orders Detail View** directly by clicking **Edit/View** next to the order in several places:

- Dashboard: In the Orders tab in Recently Changed Information Area to view and edit recently changed orders.
- Contacts Detail View and Quotation Details View: In the Orders tab in the Linked Items Area to view and edit contact information related to each order.
- Orders List View: to view and edit a found set of orders.

When Orders Detail View appears, users may edit all aspects of an order.

Deleting Orders

Orders can be deleted by clicking **Delete** in several places:

- Orders Detail View: In the Tool Bar.
- Orders List View: To the right of the order.

The order will be deleted after your confirmation of the action.

Orders Preferences

Order Preferences allows the <u>System Administrator</u> to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in <u>User Info</u>.

Tax : Discount						
Orde	er # Prefix					
	Footer					

- Check the **Tax** box and enter the tax value to enable tax calculation on orders.
- Check the **Discount** box to enable the discount calculation on orders. The discount will be automatically applied on orders created using the customer's **Discount** value.
- Use the **Order # Prefix** field to enter the value that will be used as the prefix in the **Order #** field.
- Use the **Footer** field to enter any additional information that will be used as the footer in all printed order forms.

Invoices

The **Invoices** module supports invoice management and the creation of printable invoices to send to your customers. Invoices can easily be created directly from any open order.

Features

Shared Invoices

All invoices are available to each team member.

• Invoice Properties

All invoices have a set of basic properties included with the software. Additional custom properties may be added at your discretion.

• Easy Invoice Retrieval

All invoices associated with a contact or order can be easily accessed within the contact or order window.

• Linked Tasks

Each invoice can be linked to a task. For instance, a sales rep can assign a task for an assistant to send a newly created fax.

Invoices Detail View

Invoices Detail View allows users to review and edit basic properties.



Basic Properties

• The unique **Invoice #** is generated automatically when an invoice is created. Users may change this field if is necessary.

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- If your company operates more than one **Brand**, you can select the appropriate brand from the drop down list.
 SUI Solutions
- The unique **Serial No** is generated automatically when an invoice is created.
- To change the sales rep associated with the invoice, click the **arrow** next to the **Our Rep** drop down list. The names in the list are product of the specific **Brand**.
- Customer's information like **Customer #**, **Company**, **Name**, **Address**, etc. is populated automatically upon invoice creation.
- Select a shipment method from the Ship Method drop down list.
- Users may add additional **Ship Methods** if necessary. Click the **Edit...** option in the drop down list in the **Edit Value List** dialog box, type each method on a separate line, in the invoice you want them to appear and click **OK**.



- The **Date** is generated automatically upon invoice creation.
- Set the invoice's status using the Status drop down list.

Status	Complete
voiced	In progress
Paid	Complete
	Cancelled

• Set the invoice's paid status using the **Paid** drop down list.

Invoice Items

h

The **Invoice Items** area displays information about associated <u>Order Items</u> from the corresponding order, their prices and quantities.

- To add a new item, click the **New** 🕙 in the **Items** tab.
- Click Delete ^{Solution} to delete the item.
 Note: An invoice may not be deleted if it has been paid.

Invoice Totals

- Sales Total is calculated automatically as the sum of all invoice items.
- **Discount** is generated automatically upon invoice creation using the customer's **Discount** value. To disable **Discount**, click the corresponding check box.
- Subtotal is calculated automatically using Sales Total and Discount.
- The **Tax** field is generated automatically on invoice creation using the **Tax** field from <u>Invoice</u> <u>Preferences</u>. You can disable **Tax** by clicking the corresponding check box.
- Use the Est. Shipping field to enter the delivery price.

Invoices List View

Invoices List View is used to view and search for invoices.

Invoices		Dashboard Contacts	Calendar Mail	Stock	Quotations Orders	Invoices	Purchases	Campaign	Files	Messaging	?
000		•					00	Detail	s	List	
Invoice #	Date	Contact #	Name			Our	Rep.	т	otal, USD	Paid	
Inv1110282.CC19	10.28.11	🕤 CC19	Cornbit			Jaso	n		950.82	No	8
Inv1110283.CC20	10.28.11	CC20	Ballanthem LTD			Jaso	n		995.00	No	8
Inv1112294.CC4	12.29.11	CC4	Best Brass Toys Inc.			Lucy			8.59	No	8
Inv1112295.CC4	12.29.11	😜 CC4	Best Brass Toys Inc.			Lucy			324.00	No	8
Record: 1 / 4 (Total: 4)						User: Bob	/ Bob Rollins	Profile	Preference	es <u>Re-lo</u>	gin

Creating New Invoices

New invoices can be created by clicking the **New** button in the **Invoices** tab in the **Linked Items Area** in **Orders Detail View**. When the **New Invoice** appears, select the items ordered and specify the **Invoice now** quantity. Then click **Create**:

SKU	Description Flatter Me	Category	Ordered	Invoiced		Invoice now
A2	Hatter Me Make a Face	iPhone apps	3	2	1	^
A4		iPhone apps	3	3	0	0
A5	ColorEyes	iPhone apps	2	2	0	0

When Invoices Detail View appears, enter data for the new invoice.

Viewing and Editing Invoices

Invoices can be viewed and edited in **Invoices Details View** directly by clicking **Edit/View** near the invoice in several places:

- **Dashboard**: In the **Invoices** tab in **Recently Changed Information Area** to view and edit recently changed invoices.
- **Contacts Detail View:** In the **Invoices** tab in the **Linked Items Area** to view and edit contact information.
- Orders Details View: In the Invoices tab in the Linked Items Area to view and edit order related invoices.
- Invoices List View: to view and edit a found set of invoices.

When the Invoices Detail View appears, users may view and edit all invoice properties.

Deleting Invoices

Invoices can be deleted by clicking **Delete** ⁽²⁾ in several places:

- Invoices Detail View: In Tool Bar.
- Invoices List View: Click Delete to the right of the invoice.

The invoice will be deleted after your confirmation of the action.

Invoices Preferences

Invoices Preferences allows the <u>System Administrator</u> to edit default settings. To change the preferences, click **Preferences** in <u>User Info</u>.

Invoices Options	
🖌 Tax : 6 %	
V Discount	
Invoice # Prefix	
Footer	
L	

- Check the **Tax** box and enter the tax value to enable the tax calculation in invoices.
- Check the **Discount** box to enable the discount calculation in invoices. The discount will entered automatically on invoice creation using the customer's **Discount** value.
- Use the **Invoice # Prefix** field to enter the value that will be used as the prefix in the **Invoice #** field.
- Use the **Footer** field to enter an additional information that will be used as the footer in printed invoices.

Purchases

The **Purchases** module supports the sales process by tracking purchase orders history and organizing data for each purchase, including associated vendor prices and shipments tracking.

Features

• Shared Purchases

All Purchases are accessible by each team member.

• Shipping tracking info

This feature allows you to get tracking info of largest logistical companies using packages tracking number only. Just enter number and company name - FedEx, UPS or DHL- and click the **Track** button.

• Simple Purchases retrieval

All Purchase Orders are linked to the corresponding products and can be easily found within the product's card.

• Linked Appointments

Each Purchase can be linked to a task. A sales rep can assign a task for an assistant to send a newly created fax, for instance.

Purchases Detail View

Use Purchases Detail View to enter basic information for the selected purchase order.



Purchases List View

Purchases List View is used to view and search for purchase orders.

00				Veda	trak Pur	chases			_				_
Purchases		Dashboard Contacts	Calendar	Mail	Stock	Quotations	Orders	Invoices	Purchases	Campaign	Files	Messaging	?
00 000		ð [00	Detail		List	
Purchases	Date	Vendor	Company					Our	Rep.	т	otal, USD	Paid	
P1110282	10.28.11	🕤 CV9	SUI Solutio	ons FM				Miss	. Lucy		47.70	No	8
P1112293	12.29.11							Lucy			189.00	No	8
Record: 1 / 2 (Total: 2)							User: Adm	in / System /	Administrator	Profile	Preference	<u>≫es Re-lo</u>	gin

Creating New Purchases

New purchases can be created by clicking the **New** in the **Purchases** tab in **Linked Items Area** in **Orders Detail View** or **Stock Detail View**. Fill in the new purchase order's data when the **Purchases Detail View** appears.

Viewing and Editing Purchases

Purchases can be viewed and edited in **Purchases Details View** directly by clicking **Edit/View** next to the purchase order in several places:

- **Dashboard**: In the **Purchases** tab in **Recently Changed Information Area** to view and edit recently changed purchases.
- Stock Detail View: In the Purchases tab in the Linked Items Area to view and edit product related purchases.
- Orders Detail View: In the Purchases tab in the Linked Items Area to view and edit order related purchases.
- Purchases List View: to view and edit a found set of purchases.

When **Purchases Detail View** appears, users may edit all aspects of an purchase order.

Deleting Purchases

Purchases can be deleted by clicking **Delete** in several places:

- Purchases Detail View: In the Tool Bar.
- Purchases List View: To the right of the order.

The purchase order will be deleted after your confirmation of the action.

Purchases Preferences

Purchases Preferences allows the <u>System Administrator</u> to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in <u>User Info</u>.

Purchases Options	
✓ Tax : 6 % ✓ Discount	
Discount	
Purchases Prefix	P
Footer	

- Check the **Tax** box and enter the tax value to enable tax calculation on purchases.
- Check the **Discount** box to enable the discount calculation on purchases. The discount will be automatically applied on purchases created using the customer's **Discount** value.
- Use the **Purchases Prefix** field to enter the value that will be used as the prefix in the **Purchase Order #** field.
- Use the **Footer** field to enter any additional information that will be used as the footer in all printed purchase order forms.

Campaign

The **Campaign** module supports the sales process by tracking promotional campaigns assigned to different prospects and customers groups.

Features

• Shared Campaigns

All Campaigns are accessible by each team member.

• Campaign Sequences

Define campaign steps with description, start date, end date and executive properties.

• Flexible Associated Contact Groups

Link your campaign sequence with any set of customer, prospect or vendor contacts.

Automatically Created Linked Appointments

After approving the campaign the set of linked appointments will be created for each contact from linked contact group.

Campaign Detail View

The **Campaign Detail View** provides access to the properties for the selected campaign.

00				_	Vedatra	ak Camp	baign	_	_		_		_	_
Campaig	gn	Dashboard Co	ontacts (Calendar	Mail	Stock	Quotations	Orders	Invoices	Purchases C	ampaign	Files	Messaging	?
🕑 🔁 😒		0 🙆								00	Details	,	List	
	10/28/2011 5:52:47 PM by <u>B</u> pect campaign	<u>3ob</u>	Modifie	ed 10/28/201	1 5:53:21 PM	by Bob		🕒 Ci	ustom F	Properties		_		
Campaign #	1	Completed	No											
Start date	For all new prospects 10/28/2011			Ŧ										
Sequence (3)	tores (0)	ntacts (2) Cal	lendar (0)	🕂 Mail (0)	•	Files (0)								
# Type	Title		<u>lendar (0)</u> Descriptic		0	Files (0)	_		gned to	Start date	e Due d	date	Complete	
# Type	Title First call				•	Files (0)	-	Ass Bob	gned to	10/31/2011			Complete No	8
# Type 1 Task 2 Task	Title First call Send general quote	D			•	Files (0)		Bob Lucy	igned to	10/31/2011 11/8/2011	Due (No No	3
# Type	Title First call	D			•	Files (0)		Bob	igned to	10/31/2011			No	8
# Type 1 Task 2 Task	Title First call Send general quote	D				Files (0)		Bob Lucy	igned to	10/31/2011 11/8/2011			No No	3
# Type 1 Task 2 Task	Title First call Send general quote	D				Files (0)		Bob Lucy	igned to	10/31/2011 11/8/2011			No No	3
# Type 1 Task 2 Task	Title First call Send general quote Standard 1 year idle	D			• •	Files (0)		Bob Lucy Bob		10/31/2011 11/8/2011			No No No	3

Campaign List View

The Campaign List View is used to overview campaigns and conduct searches.

00	Vedatrak Campaign												
Campaig	jn	Dashboard	Contacts	Calendar	Mail	Stock	Quotations	Orders	Invoices	Purchases	Campaign	Files Mes	saging ?
••	0000	00							_	00	Details		ist
Campaign #	Created	Name									Start date	Complet	ed
🔾 1	10/28/2011	New prospect car	npaign								10/28/2011	No	8
2	12/29/2011	Annual ring									12/29/2011	No	8
Record: 2 / 2 (1	ſotal: 2)							User: Adm	in / System /	Administrato	r <u>Profile</u>	Preferences	Re-login
0 and 🗖 Brow			_	_	_	_	_	_		_			

Creating New Campaigns

A new campaign can be created by clicking **New** 至 in several places:

• Campaign Detail View or Campaign List View In Tool Bar

When the Campaign Detail View layout appears, enter the new campaign's data.

Viewing and Editing Campaigns

Campaigns can be viewed and edited in the **Campaign Detail View** directly by clicking **Edit/View** near the campaign in several places:

• Campaigns List View: To view and edit a found set of campaigns.

When Contacts Detail View appears, you can view and edit all properties.

Deleting Campaigns

Campaigns can be deleted by clicking **Delete** ⁽²⁾ in several areas:

- Campaign Detail View: In Tool Bar.
- **Campaign List View**: To the right of the campaign.

The campaign will be deleted after your confirmation of the action.

Files

The **Files** module allows users to store documents and other files, like images and sounds, directly within the database. Each file can be linked to any location within Vedatrak. A sales rep, for example, can link a quotation spreadsheet to a specific contact or appointment.

Features

Shared Files

All files stored within the database are accessible to each user.

• File Properties

All files have a set of basic properties included with the software. Additional custom properties may be added at your discretion.

• Easy File Retrieval

All files are located directly within the linked location in Vedatrak. A quotation for a specific contact can be found within the contact's card, for instance.

• Linked Tasks

Each file can be linked to a task. For instance, a manager can create a task for an assistant to proofread a spreadsheet stored in Vedatrak.
Files Detail View

Files Detail View allows users to view and edit properties for the selected file.

00					Vedatrak F	iles							_
Files	_	Dashboard	Contacts C	alendar M	ail Stock	Quotations	Orders	Invoices	Purchases	Campaign	Files	Messaging	?
0 00		96 0							00	Detail	s	List	
Created 3/29/2 cal-daily-big.	010 4:42:11 PM by	James	Modified	10/28/2011 5:4	8:42 PM by <u>Bob</u>		🕒 Cus	tom Pro	operties		_		
	232.3 KB	Description [Products SUI Screenshot 1	Calendar Sta	indard]		4							
Туре	Descr	ription											
Stock	SUIC	alendar Advanced											8
0	-									D. C.	1.0-4		-
Record: 1 / 3 (Total:	: 3)						User: admii	n / System A	dministrator	Profile	Preferen	ices <u>Re-lo</u>	<u>gin</u>

- The File box displays the file icon and size.
- Enter the file description in the **Description** field.
- To export the file to a system file, click **Export file** next to the **File** box

Files List View

Files List View is used to view and search for files.

00			Vedatral	Files					_		_
Files	Dashboard (Contacts Calendar	Mail Stoc	k Quotations	Orders	Invoices	Purchases	Campaign	Files	Messaging	?
0000		[00	Detail	<u>s</u>	List	
File		Туре	Size	Description							
😜 cal-daily-big.png		png	232.3 KB	[Products SUI	Calendar	Standard]					8
cal-week-big.png		png	239.2 KB	[Products SUI	Calendar	Standard]					8
Inv09101638_IC23.pdf		pdf	83.3 KB	Invoice for Or	rder # 091	01639.IC23					8
Record: 1 / 3 (Total: 3)					User: Adm	in / System #	Administrato	Profile	Prefere	nces <u>Re-k</u>	ogin

Selecting and Creating New Files

New files can be selected or created by clicking the **New** in the **Files** tab in the **Linked Items Area** in several places:

- Contacts Detail View: to select or create the contact related file.
- Mails Detail View: to select or create the mail related file.
- Orders Detail View: to select or create the order related file.
- Invoices Detail View: to select or create the invoice related file.
- Products Detail View: to select or create the product related file.

When the Select File window appears, select an existing file or create new one by clicking New

		00
Туре	Size	Description
png	136.9 KB	[Products SUI Calendar Standard]
png	145.8 KB	[Products SUI Calendar Standard]
pdf	89.2 KB	Invoice for Order # 09101639.IC23
	png	png 136.9 KB png 145.8 KB

Viewing and Editing Files

Files can be viewed and edited in the **Files Details View** directly or by clicking **Edit/View** next to the file in several places:

- **Dashboard**: In the **Files** tab in the **Recently Changed Information Area** to view and edit recently changed files.
- Files List View: To view and edit a found set of files.
- Contacts Detail View: To view and edit the contact related file.
- Mails Detail View: To view and edit the mail related file.
- Orders Detail View: To view and edit the order related file.
- Invoices Detail View: To view and edit the invoice related file.
- **Products Detail View**: To view and edit the product related file.

Deleting Files

Files can be deleted by clicking **Delete** ^(S) in several places:

- Files Detail View: in Tool Bar.
- Files List View: To the right of the file.

The file will be deleted after your confirmation of the action.

Users

Users is a convenient tool that simplifies account management for the entire system.

Features

- One Touch User Management Users and roles are maintained consistently throughout all solution files in one spot.
- Intuitive User Interface Allows users to edit user properties, add photos, scanned signatures and adjust user settings.
- Easy-to-use Roles Adjustment Set privileges and add, change, or delete users in several FileMaker files simultaneously with a minimal amount of prep work.

• External User Management

User Manager can be used to manage roles and users in any FileMaker files outside of Vedatrak.

Using Users

Users List View is used to view and search for users. Each user has an individual User Profile including **Login**, **Name**, <u>Role</u>, **E-mail**, **Photo**, **Signature scan** and the **Active** status.

Users	Dashboard Contact:	Calendar Mai	I Stock Quotation	is Orders Invoices	Purchases Campaign	Files Messagin	
000	DD X00				9	O List	
Login	Name	Role	E-mail			Active	
Admin	System Administrator	Sysadmin					
Jason	Jason Burch	Sales manager				5	8
🕒 Lucy	Lucy Mays	Sales staff				¥	8
Bob	Bob Rollins	Administrator					
🕥 James	James Travis	Power user				1	8

You can access the **Users** module in multiple locations:

• Click the **Users** button in the <u>Service Modules</u> navigation bar in **Dashboard**. *Note:* This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>.



• <u>Configure your system default Navigation Bar</u> to view the **Users** module and conveniently access the **Users** using standard **Navigation Bar**,

	Modules	<u>Dashboard</u>		<u>Calendar</u>	Messagi	ng		
	Name		#	Title		Show in nav	/bar	
	Mail	2	21	Mail		V Dou	<u>wn</u>	<u>Up</u>
	Files	21	15	Files		V Dor	<u>wn</u>	<u>Up</u>
	Products	22	27	Products		V Dor	<u>wn</u>	Up
	Orders	2	22	Orders		V Dor	<u>wn</u>	<u>Up</u>
	Invoices	2	23	Invoices		V Dor	<u>wn</u>	<u>Up</u>
0	<u>Messaging</u>	21	14	Messaging		Doi:	<u>wn</u>	<u>Up</u>
•	<u>Users</u>		6	Users				Up
0	Themes	2	20	Themes				
0	Multilang	ŕ	18	Multilang				

Creating New Users

Note: This feature is limited to the System Administrator and Administrator.

New users can be created by clicking **New** • in several places:

- Dashboard: In the Users tab in the Recently Changed Information Area.
- Users List View: In Tool Bar.

When the Edit profile window appears, enter the new user's data

Editing User Profile

User Profile can be edited in multiple ways:

- <u>User Info</u>: Click **Profile** to edit your own **User Profile**.
- Dashboard: Click Edit/View next to the user in the Users tab in the Recently Changed Information Area to edit recently changed users.
- Users List View: Click Edit/View ^{Sol} next to the user to edit a set of users.

When the Edit profile window appears, you can edit all the user properties:

Close	Password 🖌 Active		
Photo	First Name Lu Last Name Ma Login Lu Role Sa E-mail	ays	*

Click **Close** to save changes and close the window.

Viewing User Profile

User Profile can be viewed in multiple areas:

- Click the Created by and Modified by fields (<u>underlined</u>) to view the creator's and modifier's profile.
- Dashboard: Click Edit/View next to the user in the Users tab in the Recently Changed Information Area to view recently changed users.
- Dashboard: Click the Created by and Modified by fields (<u>underlined</u>) in the Recently Changed Information Area to view the creator's and modifier's profile.
- Users List View: Click Edit/View ¹ near the user to view a found set of users.

When the **View profile** window appears, users may view user properties:

Close			
Photo	First Name	Bob	
	Last Name		
	Login	Bob	
	Role	Administrator	
	E-mail		
	Language	English	
Signature			
Rollo B.			
			_

Click **Close** to close the window.

Changing User Password

To change a password: Open the User Profile to edit, then click Password .

Click **Close** to close the window.

Deleting Users

Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>. You can not delete the **admin** user.

Click **Delete** to the right of the user in the **Users List View**.

The user will be deleted after your confirmation of the action.

Themes

The **Themes** module is used to personalize Vedatrak's appearance. Users can adjust different graphic elements including colors, button styles or icons. These changes will be applied to every module.

Features

• Multiple Themes

Choose from existing themes or create themes of your own.

• User Specific Themes

Each user can select and store a theme within Preferences.

• Special Themes

Administrators can create special themes for holidays and for special corporate events.

Using Themes

The **Themes Detail View** allows users to view a chosen theme and apply changes.



The Themes List View is used to view and search the themes.

ū	hemes		Dashboard	Contacts	Calendar	Mail	Stock	Quotations	Orders	Invoices I	Purchases Ca	mpaign Files	Messaging	?
¢	0 📀 🔇										00	Details	List	
	Name	Description						Created		by	Modif	ied	by	
0	Standard	Default						4/21/2009 1	2:41:42	Admin	7/20/2	011 3:59:42	admin	
0	Metal							8/28/2009 7	:34:50	Admin	10/28/	2011 6:05:15	Bob	8
0	Violet							3/26/2010 1	2:01:17	Admin	10/28/	2011 6:05:19	Bob	- 6
	Record: 2 / 3 (To	tal: 3)							User: Bo	b / System Ad	ministrator	Profile Prefe	arences Re-lo	ain

Users may access the Themes module in multiple ways:

• Click the **Themes** button in the <u>Service Modules</u> navigation bar in **Dashboard**. *Note:* This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>.

		and a second second second
Users	(Themes	Multilang

• <u>Configure your system default Navigation Bar</u> to view the **Themes** module and conveniently access the **Themes** using standard **Navigation Bar**.

	Modules	<u>Dashboard</u>		<u>Calendar</u>	<u>Messaging</u>	
_	Name		#	Title	Show in navbar	
	Mail		21	Mail	V Down	<u>Up</u>
	Files	:	215	Files	V Down	<u>Up</u>
	Products	:	227	Products	V Down	Up
	Orders		22	Orders	V Down	Up
	Invoices		23	Invoices	V Down	<u>Up</u>
0	Messaging	:	214	Messaging	Down	<u>Up</u>
•	Themes		20	Themes		<u>Up</u>
0	<u>Users</u>		6	Users		
•	<u>Multilang</u>		18	Multilang		

• Open the Vedatrak Themes.fp7 file directly.

Viewing and Editing Themes

 In Themes Detail View, select the theme you would like, right-click on any graphical element in Theme Editor and choose Insert picture in the context menu. Then select the image you want to use.

Violet + K K K K K K K K K K K K K K K K K K K	
⁻ /->	
4 1	

Note: This feature is limited to the System Administrator and Administrator.

• Click **Apply** in the **Tool Bar** to apply the theme.

Tip: You can export the original image - for using at a later time or just to save it. Use the *Export Field Contents* command of the context menu.

Creating New Themes

Note: This feature is limited to the System Administrator and Administrator.

An unlimited number of interface looks can be created for Vedatrak using the **Themes** module.

- To create a new theme, select an existing theme you will use as the prototype then click **Duplicate** in **Tool Bar**.
- Enter the theme's **Name** and <u>edit the theme</u>.
- Click **Apply** in the **Tool Bar** to apply the theme.

Deleting Themes

Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>. You can not delete the **Standard** dictionary.

Themes can be deleted by clicking **Delete Output** in several locations:

- Themes Details View: In Tool Bar.
- Themes List View: To the right of the theme.

The theme will be deleted after your confirmation of the action.

MultiLang

MultiLang adds multilingual support to Vedatrak. While several additional language sets are included with Vedatrak, this useful language editor allows for the creation of additional dictionaries quickly and easily. This module can be used to translate most application elements.

Features

- **One-Touch Language Adjustment** Languages <u>may be switched in one touch</u> at run-time with no need to restart the program.
- Predefined Language Sets All application elements are already translated into Spanish, French, German and Russian.
- Handy Language Editor

Create your own language dictionary for virtually any language using the language editor.

Using MultiLang

Each user <u>may choose</u> their own language for Vedatrak. Each language has a dictionary with each word used in Vedatrak. **MultiLang List View** allows users to edit the dictionary for the existing languages and create new ones.

MultiLa		s Calendar Mail Stock Quotations Orders Invoices Purchases (Campaign Files Messaging ?
ত্ত এ		🕓 🕥 Language English 🔍	😕 🔁 🛛 List
Laber Id 🛦	Label clarification	Translation Apply Changes	
1	Calendar.Appointment	Appointment	9
2	Calendar.Appointment Calendar.DarlyAppointments	Daily Appointments New Language	9
3	Calendar.Event	Event Delete Language	- / Q
4	Calendar.ExpiredAppointments	Expired Appointments	8
<u>5</u>	Calendar.EditAppointment	Edit Appointment	3
<u>6</u>	Module.Users	Users	8
Z	Common.Login	Login	9
8	Users.EditProfile	Edit profile	8
9	Common.AssignedBy	Assigned by	8
10	Calendar.Subtasks	Subtasks	8
11	Users.Photo	Photo	9
<u>12</u>	Common.Company	Company	8
13	Contacts.Phones	Phones	9
14	Common.Email	E-mail	8
<u>15</u>	Common.Notes	Notes	8
16	Module.Dashboard	Dashboard	9
17	Module.Contacts	Contacts	9
18	Module.Multilang	Multilang	9
<u>19</u>	Module.Calendar	Calendar	9
20	Module. Themes	Themes	8
21	Module.Mail	Mail	3

You can access the MultiLang module in multiple locations:

• Click the **MultiLang** button in the <u>Service Modules</u> navigation bar in **Dashboard**. *Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>.*

Users	1	Themes	1	Multilang

• <u>Configure your system default Navigation Bar</u> to view the **MultiLang** module and conveniently access the **MultiLang** using standard **Navigation Bar**.

	Modules	<u>Dashboard</u>		<u>Calendar</u>	<u>Messaging</u>	
	Name		#	Title	Show in navbar	_
	Mail		21	Mail	V Down	<u>Up</u>
	Files	2	215	Files	V Down	<u>Up</u>
	Products	2	27	Products	V Down	<u>Up</u>
	Orders		22	Orders	V Down	<u>Up</u>
	Invoices		23	Invoices	V Down	<u>Up</u>
0	Messaging	2	214	Messaging	Down	<u>Up</u>
•	<u>Multilang</u>		18	Multilang		<u>Up</u>
0	<u>Users</u>		6	Users		
•	Themes		20	Themes		

Viewing and Editing Dictionaries

Note: This feature is limited to the System Administrator and Administrator.

• Select the language you desire in the Language drop down list at the top of MultiLang List View.

Language	English	
	Deutsch	
	English	
	Français Русский	
tments	_	_

- To modify a dictionary entry, change the contents in the **Translation** column.
- Click **Apply (19)** to apply the changes you've made.

Warning: Each language has a dictionary with all the words used in Vedatrak. Do not delete the dictionary items - doing so will remove the items from all dictionaries.

Creating New Dictionaries

Note: This feature is limited to the System Administrator and Administrator.

An unlimited number of languages can be created in Vedatrak using Multilang.

- To add a language, click **New** 🔨 to the right of the **Language** drop down list.
- Enter the name of the new language and click **OK** to open the new dictionary.
- The Label clarification column lists the basic words used in Vedatrak. Enter the translation for the new language in the Translation column.
- Click **Apply I** to apply the changes you've made.

Warning: Each language has a dictionary with all the words used in Vedatrak. Do not delete the dictionary items - doing so will remove the items from all dictionaries.

Deleting Dictionaries

Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>. You can not delete the **English** dictionary.

To delete a language, select it in the **Language** drop down list then click **Delete** to the right of the drop down list.

The dictionary will be deleted after your confirmation of the action.

Messaging

The **Messaging** module makes communication between database users simple with an integrated instant messaging system. Users can even send smart links to objects within the database.

Features

• Public Messages

Users may choose to broadcast messages to all database users.

Private Messages

Users may select to send messages to a specific user.

System Messages

System messages will alert users of individuals entering and exiting the Messaging module.

- Sending Smart Links Users can send links to database locations to other users.
- New Message Notifications
 <u>Status Bar</u> in every module of the system alerts users with new message notifications.
- Message History

The **Messaging** module logs your conversations with other database users.

Messaging Compact View

Messaging Compact View allows users to view online and offline database users and their statuses, manage their personal status and quickly switch between different **Messaging** modes.

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• To change your own status select the Status drop down list and click Apply.

🔏 Online 🛛 🔻 🗸	
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- You can view online and offline database users in the **Users** list. To view online users only, check the **Online users only** box.
- To send a private message to another user, click the user name in the Users list.
- To switch to different **Messaging** modes use the **Navigation** area.

Messaging Public View

Messaging Public View allows users to broadcast a message to all database users, review the broadcasted message list and broadcasted <u>database links</u>.

00	Vedatrak Messaging
Public	Dashboard Contacts Calendar Mail Stock Quotations Orders Invoices Purchases Campaign Files Messaging ?
👌 Online 🔹 🥑	Public Private
System Administrator A Bob Rollins Bob Rollins S James Travis S Jason Burch Lucy Mays	New message
	System Administrator Enter (12/29/2011 4:20:44 PM) Bob Rollins Exit (12/29/2011 4:14:30 PM)
Navigation	Links (0)
Compact Private messages History Preferences	
Thursday, December 29, 2011	User: Admin / System Administrator <u>Profile</u> <u>Preferances</u> <u>Re-login</u>
Browse	

- To broadcast a message, write it in the New Message field then click Send.
- Click Spell Check with to perform a spell check before the message is sent.
- To change your own status, select the Status drop down list and click Apply.

8	Online	T	0
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- You can view online and offline database users in the **Users** list. To view online users only ,check the **Online users only** box.
- To send a private message to another user, click on the user name in the Users list.
- To switch to different Messaging modes use the Navigation area.
- To open received database links click Edit/View ᄋ next to the link.

Messaging Private View

Messaging Private View allows users to send a private message to a selected database user, review the private message list and private <u>database links</u>.

00		Ved	atrak Messagir	Ig			
Private	Dashboard Contacts	Calendar Mail	Stock Quo	tations Orders	Invoices Purchases	Campaign Files	s Messaging ?
\delta Online 🔻 🥝						Public	Private
Users System Administrator Bob Rollins James Travis Jason Burch Lucy Mays	Bob Rollins - New mess	sage				- - -	Send
Chline users only	Message list System Administrator (11/2/201 Welcome to Vedatrak!	1 6:14:32 PM)					
Navigation	Links (0)						
 <u>Compact</u> <u>Public messages</u> <u>History</u> <u>Preferences</u> 							*
Wednesday, November 2, 2011		-		User: admi	in / System Administrator	<u>Profile</u> <u>Prefe</u>	erences <u>Re-login</u>

- To send a private message to a selected user, enter text in the **New Message** field then click **Send**.
- Click Spell Check with to perform a spell check before the message is sent.
- To change your own status, select it from the Status drop down list and click Apply.



- You can view online and offline database users in the **Users** list. To view online users only check the **Online users only** box.
- To send a private message to another user click on the user name in the Users list.
- To switch to a different **Messaging** mode, use the **Navigation** area.
- To open received database links, click **Edit/View** next to the link.

Sending Public Messages

Open **Messaging Public View** using the **Navigation** area, write your broadcast message in the **New Message** field and then click **Send**.

Sending Private Messages

In Messaging Compact View, Messaging Public View or Messaging Private View click the user name in the Users list. When the Messaging Private View window appears, write your private message in the New Message field then click Send.

Sending Database Links

The database links is similar to <u>Individual Bookmarks</u> but is used for sending this information to other users.

- Select an item or items in Vedatrak. Using the **Link** button in **Tool Bar**, copy the link to the clipboard.
- Paste the link (for example: vdt:/Contacts/73#Contacts:+SUI+Solutions) from the clipboard to the appropriate position in the New Message field. Then click Send. The link appears in both the sender and recipient's Links area.
- To open received database links, click Edit/View 🕥 next to the link.

Tip: You can send links via e-mail or any instant messenger. To open received database links, paste the link into <u>Dashboard's Quick Find</u>. Then click the **Find** button.

Reading Messages

• <u>Status Bar</u> in every module of the system will alert users about new messages. Use the **Read** and **Ignore** buttons to read or ignore new messages.

Read Ignore New message from Bob Rollins

• Use <u>Messaging Preferences</u> to adjust the message notifications.

Messaging History

Messaging History logs your conversations with other database users. Use the **History** button in the **Navigation** area to open the **History** window.

Close			Find	Delete
rstem Administrator (12/29/2011 s good day for a hard work I think	1 4:23:26 PM) (;)			-
stem Administrator (12/29/2011 Illo team!	1 4:22:20 PM)			
stem Administrator Enter (12/2	9/2011 4:20:44 PM)			
b Rollins Exit (12/29/2011 4:14:	:30 PM)			
		 		-
Messages Public Priva	te User	▼ <u>Me</u>	Since 12/28/2011 ×	To 12/29/2011 ×

- Use the **Find** button to perform a find in **History**.
- Messages in **History** can be organized by type (*Public* or *Private*), the **Sent** and **Received** date, and by the **User** (including quick accessible values: *Me* or *All* the users).
- Click Close Close to close Messaging History.

Messaging Preferences

Messaging Preferences allow users to edit default **Messaging** settings and graphics. To change the preferences, click the **Preferences** button in <u>User Info</u>.

Messaging Options	Syste	System messages						
Display messages for last 1 days	On entry			Enter	Enter			
		Exit						
Open on startup	When status changed			Status changed				
✔ Inform about new private messages	Icons							
	Online	Away	NA	Occupied	DND	Offline	Other	
Inform about new public messages	8	8	8	8	8	8		

Messaging Options

- Use the **Display messages for last X days** field to determine what messages you'd like to view in your **Message List**.
- Check the **Open on startup** box to open Messaging on Vedatrak startup.
- Check the **Inform about new private messages** box to receive alerts about new private messages in **Status Bar**.
- Check the **Inform about new public messages** box to receive alerts about new public messages in **Status Bar**.

System Messages

The message system can send users the public **Message List** when you enter, when you exit and when you have changed your status.

lcons

Note: This feature is limited to the System Administrator and Administrator.

• Users may change the system default status icons.

Vedatrak Internals

Basic technical information regarding Vedatrak is included here.

Vedatrak is delivered as a set of FileMaker database files containing data, layouts, scripts and user account information.

FileMaker layouts compose the user interface. Data entry *forms, reports, navigation bars*, and *custom dialogs* are all parts of the layout.

Since Vedatrak gives defined users full control of its databases, these users can customize existing layouts, create additional layouts, make reports and modify database tables according to business needs. To access layouts and database tables in design mode, the user must have valid system privileges.

Vedatrak can operate in a single user desktop mode but is more efficient when information is shared between users through an LAN or the Internet. FileMaker can share the information from databases in two main modes:

- FMNET protocol: Users who want to access the database must have FileMaker installed locally.
- **Instant Web Publishing Access:** FileMaker operates like a web server and the remote user only needs a browser to access the database.

Support / Contact

For troubleshooting, product suggestions or comments on how to improve our product, please e-mail us:

fmsupport@suisolutions.com

For information on our other products, please visit our web site:

http://filemaker.suisolutions.com

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