VEDATRAK CRM 3.0

User Guide

Contents

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 Contacts 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 Dashboard 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.

- **Simple Time Management**
  Using the Calendar 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**
  Mail 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 Stock 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 Campaign 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 Messaging module.

- **User Management**
  The Users module allows administrators to manage users across all solution files in one convenient location.

- **Multilingual Capabilities**
  MultiLang comes complete with several preinstalled language sets. Using the handy language editor, additional dictionaries can be easily created at any time.

- **Customizable Appearance**
  The Themes module can be used to change colors, button styles and icons.

- **Internal Instant Messaging**
  The Messaging 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

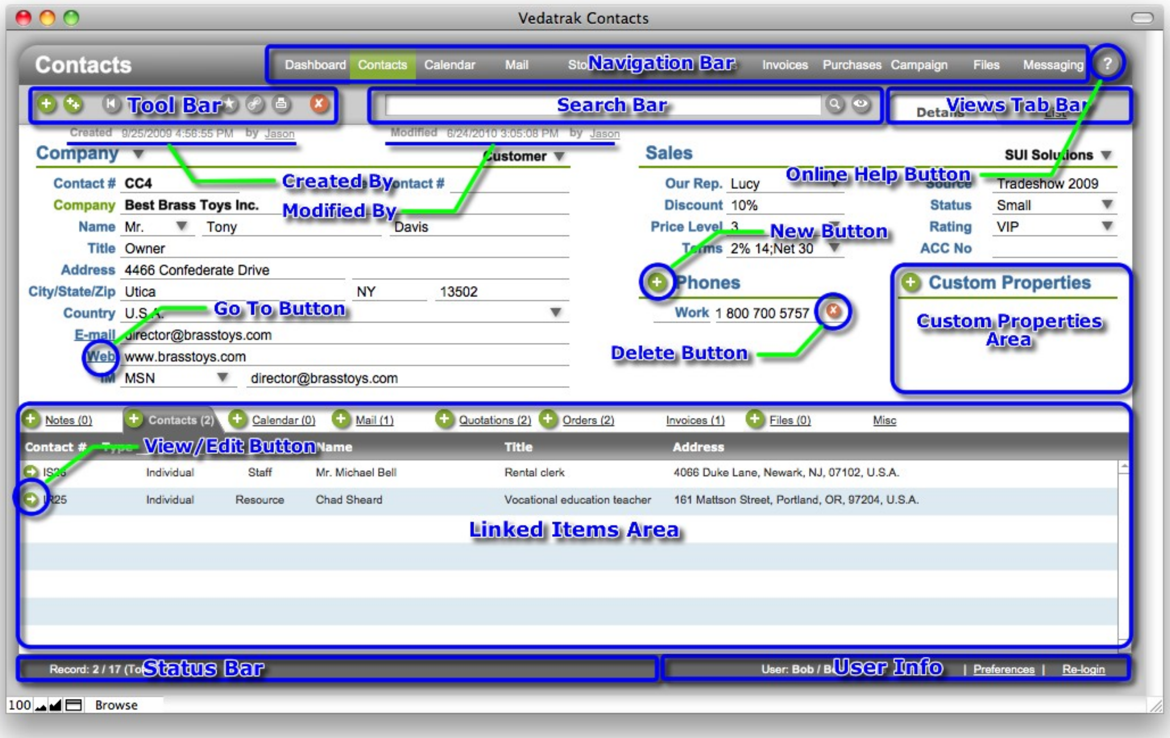
Sales Staff can create data, including Contacts, Orders, Appointments, Invoices, etc. These users can edit only their own data.

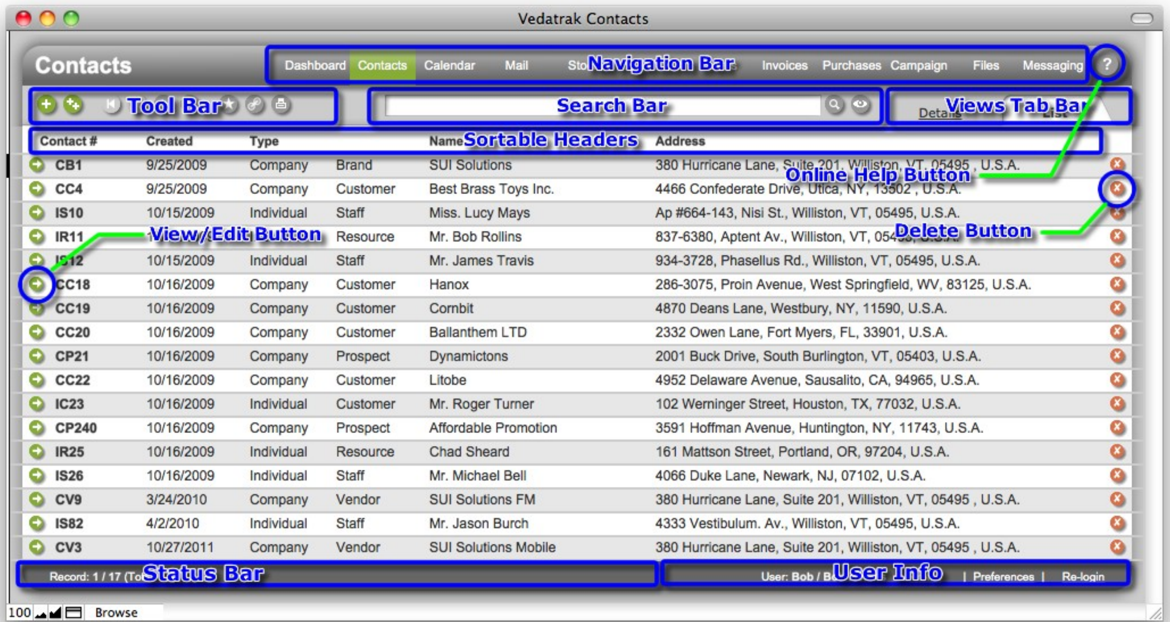
Power User

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:





Navigation Bar

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

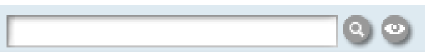
Tool Bar

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

Button	Action
	Navigate to first item.
	Navigate to last item.
	Navigate to previous item.
	Navigate to next item.
	Add a new item.
	Duplicate current item.
	Add current item(s) to Bookmarks.
	Copy link for current item(s) to send via Messaging.
	Print current item.
	Delete current item.
	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**  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**.

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.

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

- **Read** and **Ignore** buttons are used to view or dismiss new messages in the Messaging module.

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

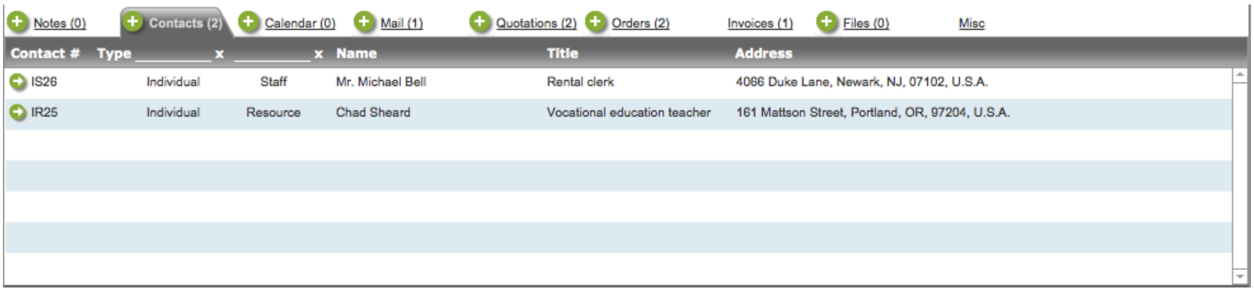
User Info

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

- **User** displays the user's login and full name.
- Click **Profile** to view or edit the User Profile.
- Click **Preferences** to view or edit User Preferences.
- 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.



Online Help Button

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

New Button

Click **New** to create a new item.

Edit/View Button

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

Delete Button

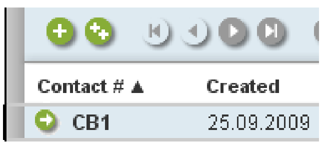
Click **Delete** to delete an item.

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.

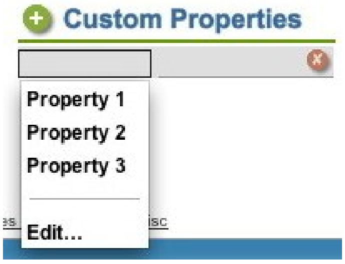


Custom Properties Area

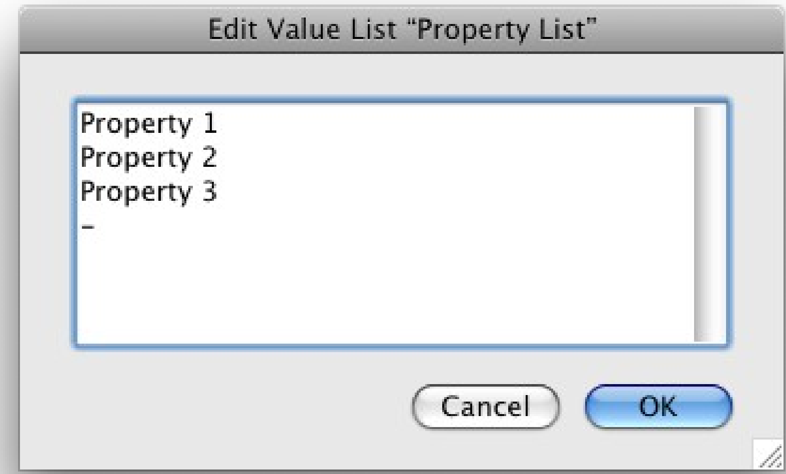
Additional custom properties may be added in Vedatrak records.

- Click **New** next to **Custom Properties** to create a new property.

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



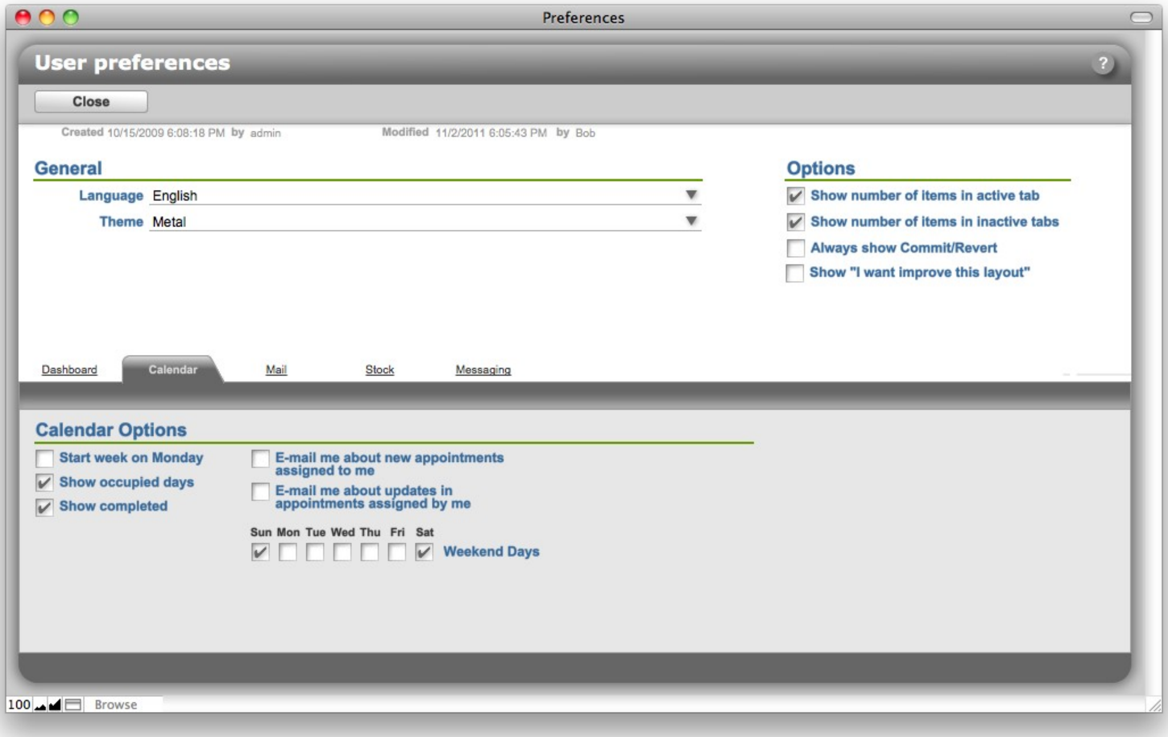
- To edit the property name list, click **Edit...** In the **Edit Value List** dialog box, type each name on a separate line in the order you want them to appear. Then click **OK**:



- 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 User Info.



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

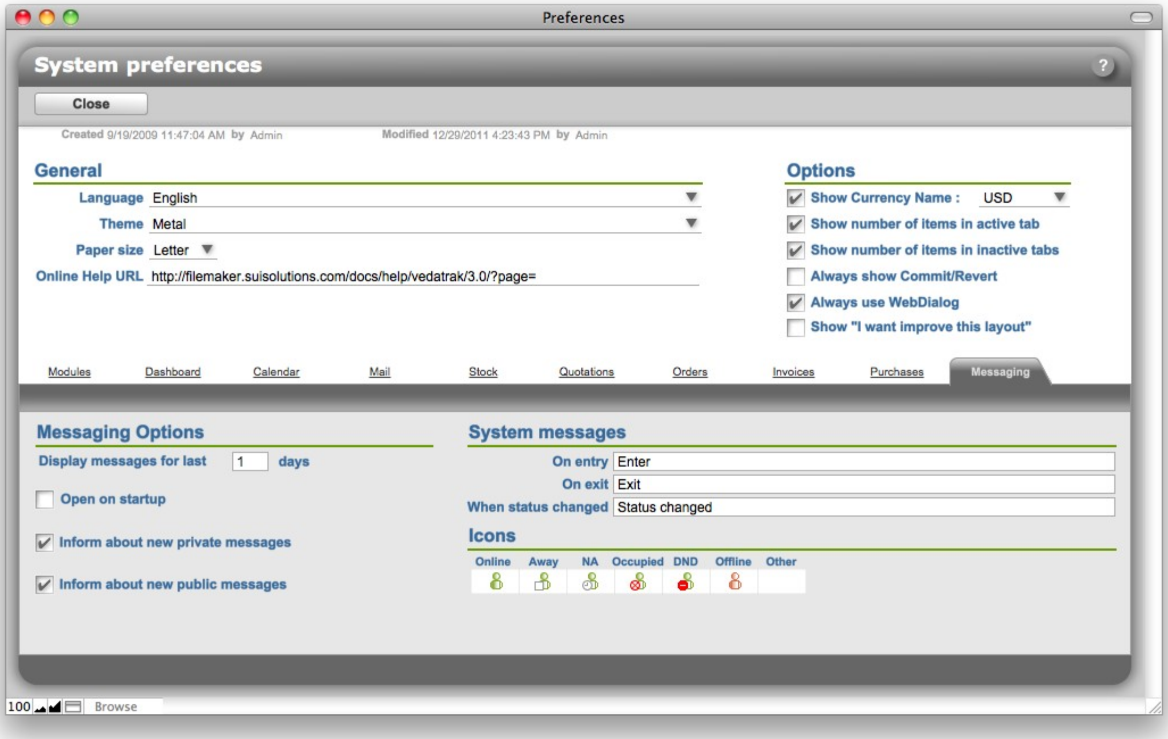
Some Vedatrak modules have unique user preferences and settings. Click the tab with the module name to change the module preferences.

For more information, see the following topics:

- Dashboard Preferences
- Mail Preferences
- Calendar Preferences
- Stock Preferences
- Messaging Preferences

System Preferences

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



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.

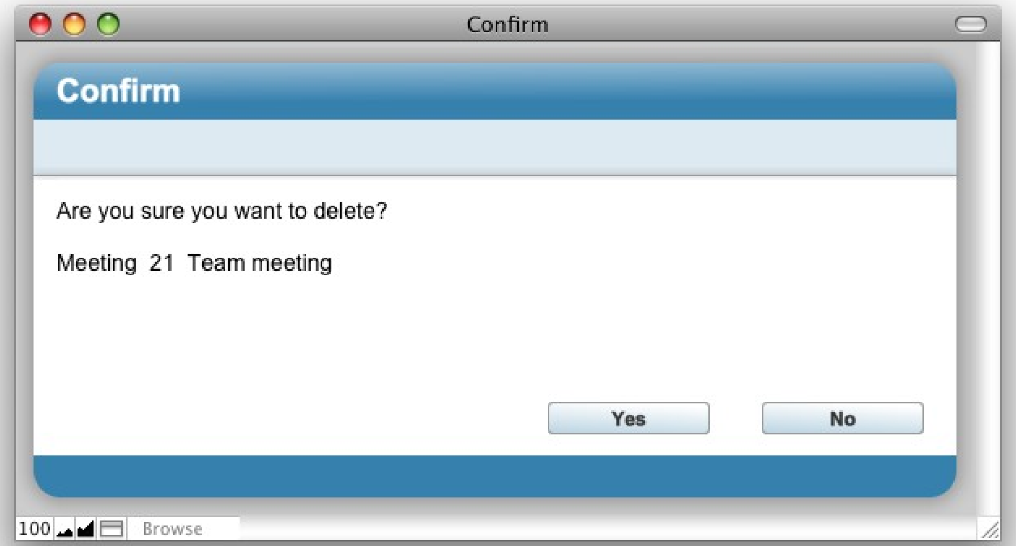
Options

- 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.

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



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 Navigation Bar 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.

For more information see the following topics:

- Dashboard Preferences
- Mail Preferences
- Calendar Preferences
- 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.

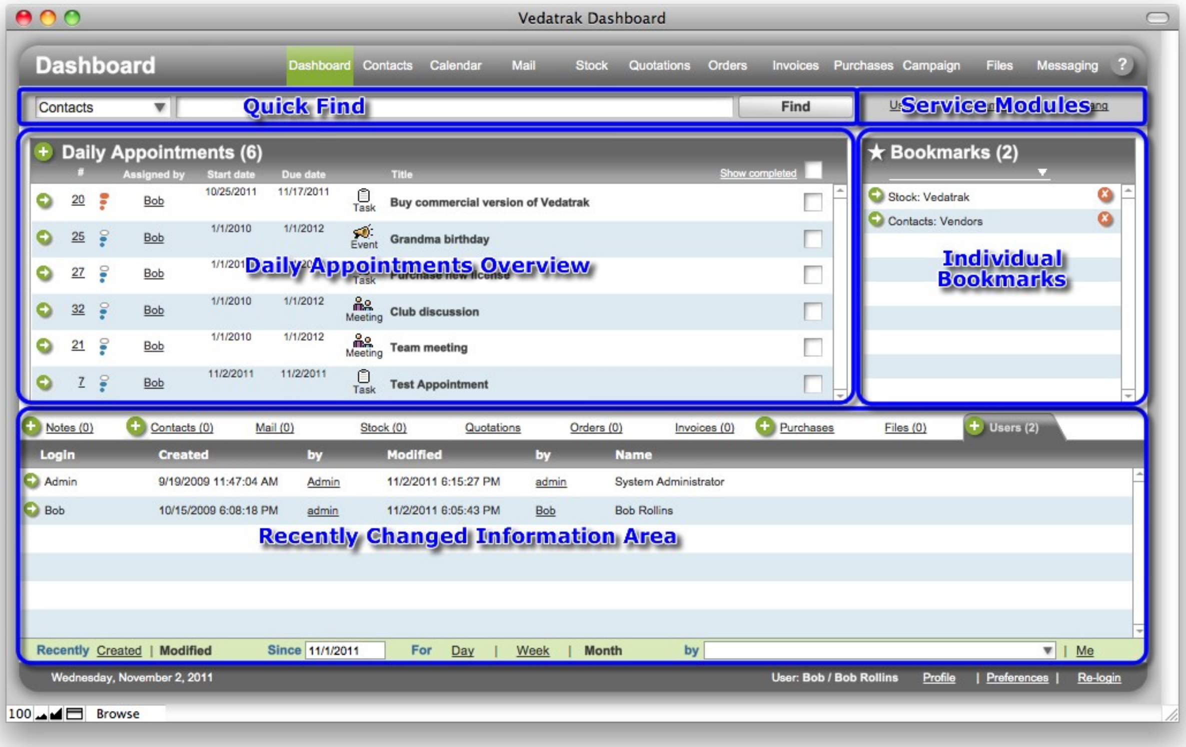
- **Individual Bookmarks**
  Add bookmarks to database spots you access frequently for easy navigation directly from the Dashboard.

- **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

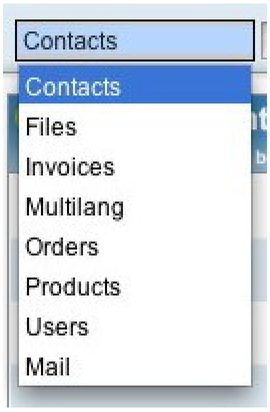
Dashboard allows quick access to important information when you start work in Vedatrak.



Quick Find

Use **Quick Find** to find records that meet specified criteria

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



- 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.

- 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** 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

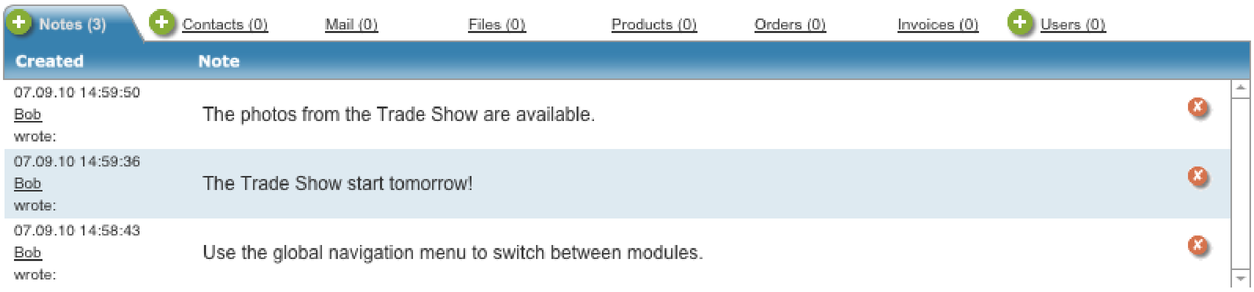
In the **Recently Changed Information Area** is all recently changed information within Vedatrak that's accessible by you. Records can be filtered by change type (***Recently Created*** or ***Recently Modified***), the **Since** date (including quick links ***Day***, ***Week*** or ***Month***) and by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

- 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.



- 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**  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 Recently Changed Information Area**.** To change these preferences, click the **Preferences** button in User Info.

Contacts

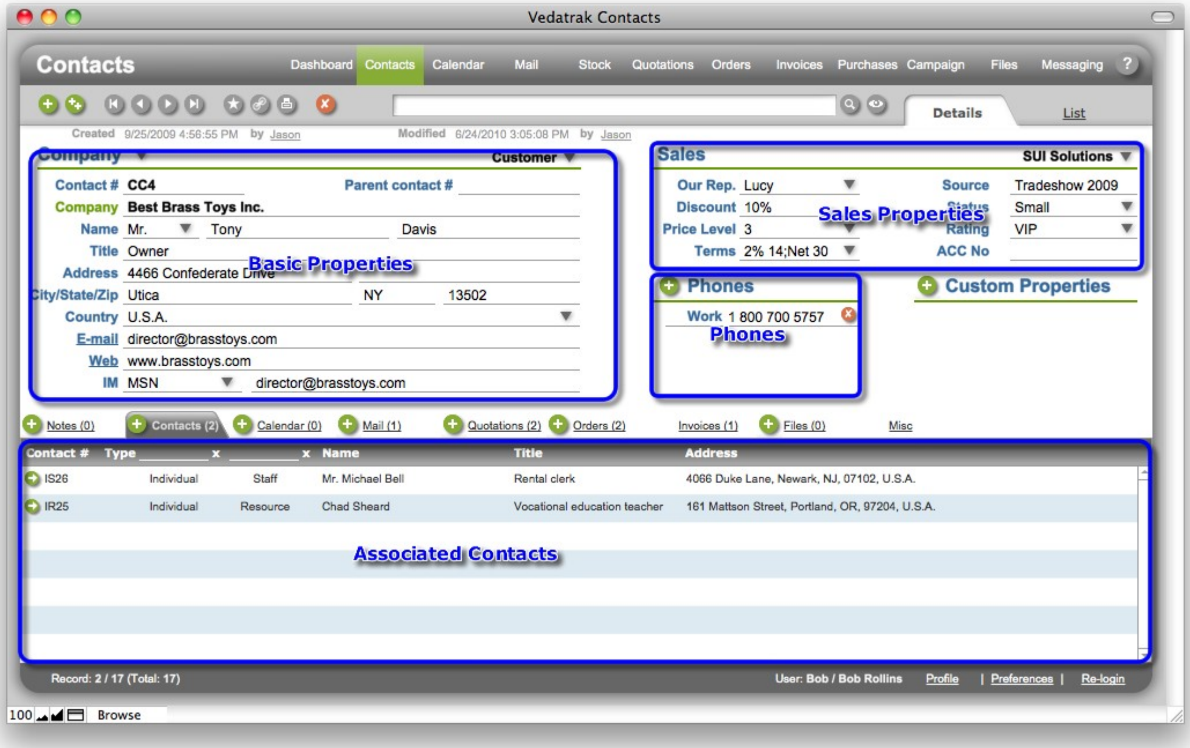
The **Contacts** module helps optimally organize contact information for business activities. Within any customer's card, you can easily access data in all linked modules, including completed and planned meetings, documents and correspondence.

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.



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 #**.

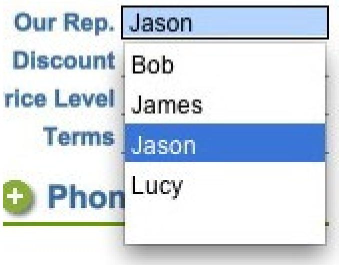
- Enter other properties, including **Name**, **Company**, **Address**, **E-mail**, etc.

Sales Properties

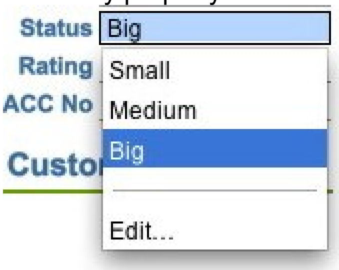
- If your company operates several **Brands**, select the appropriate **Brand** using the drop down menu.

- Input **Sales Properties**:

- 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** to delete the phone.

Associated Contacts

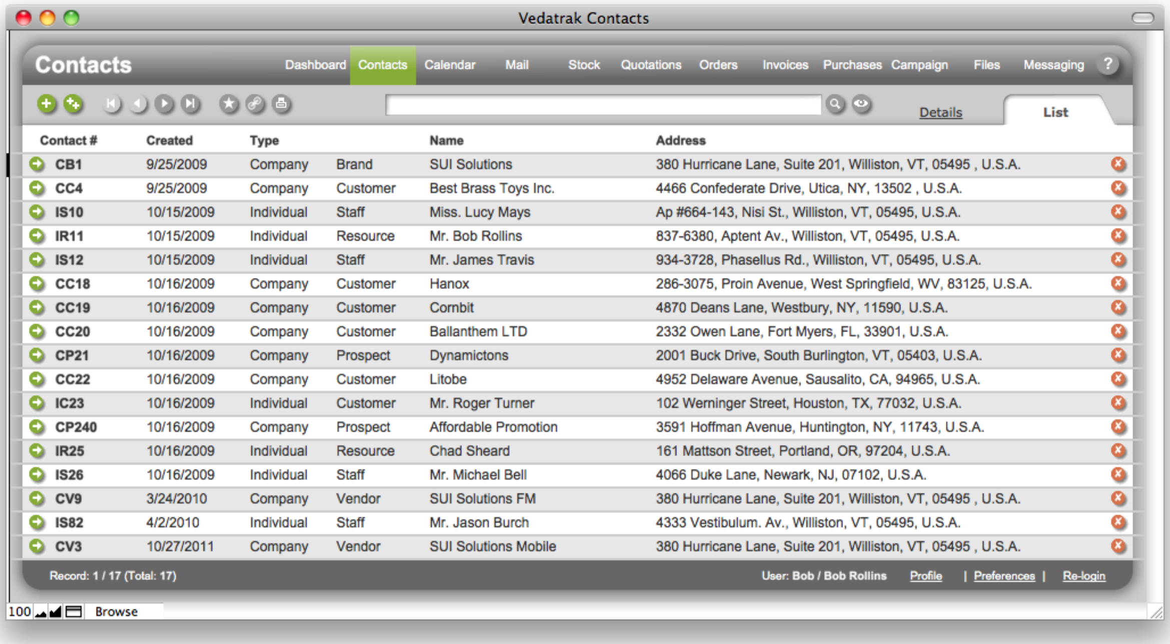
Associated Contacts can be added to any existing contact, called a **Parent contact**. When working within any contact card, you can see its Parent contact or any nested contacts. The set of contact types is customizable.

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

Contacts List View

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



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** 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

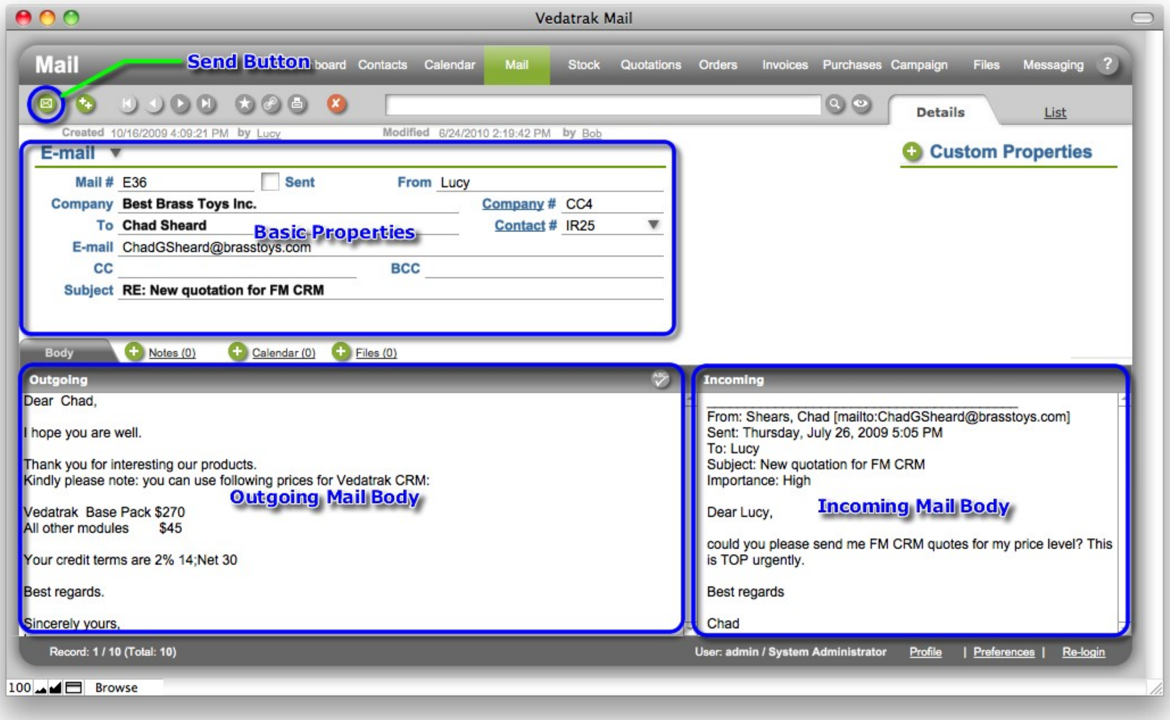
The **Mail** module helps track and organize e-mail, mail and fax correspondence. A correspondence history for each contact is available to all team members. Messages can be grouped or filtered by topic to track specific conversations.

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**  to check your message before it is sent.

Incoming Mail Body

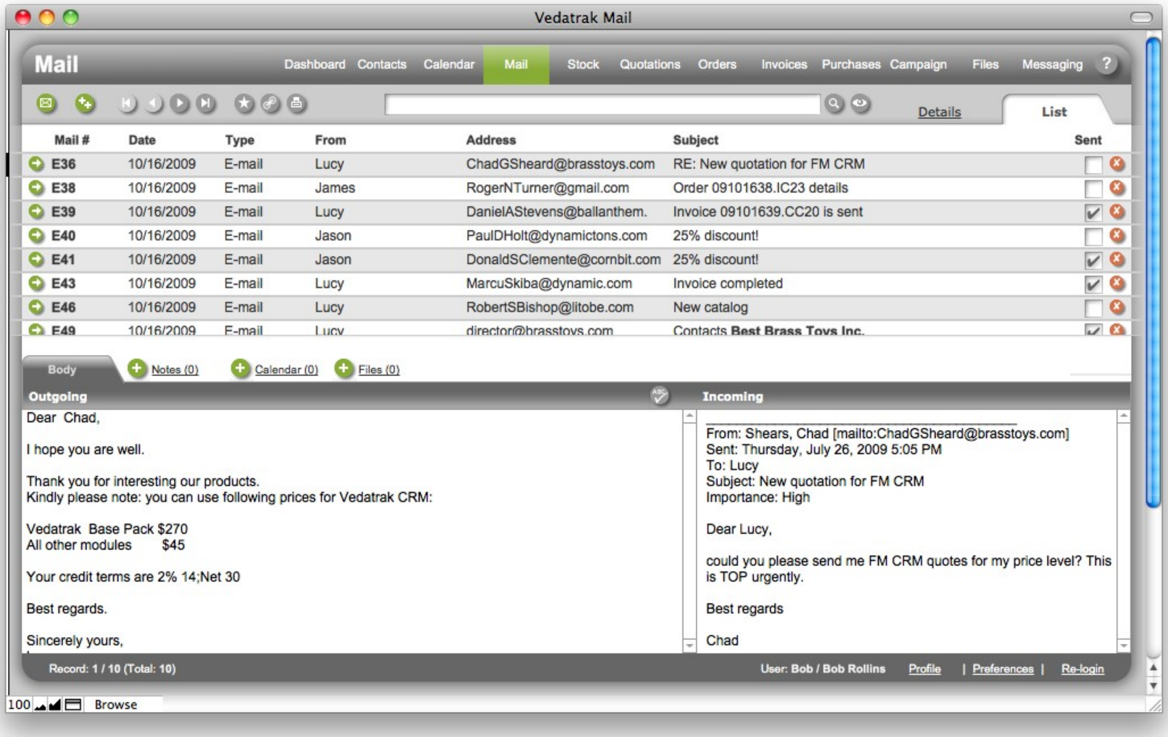
Users may copy and paste the incoming message to the **Incoming** field if necessary to view it while writing.

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

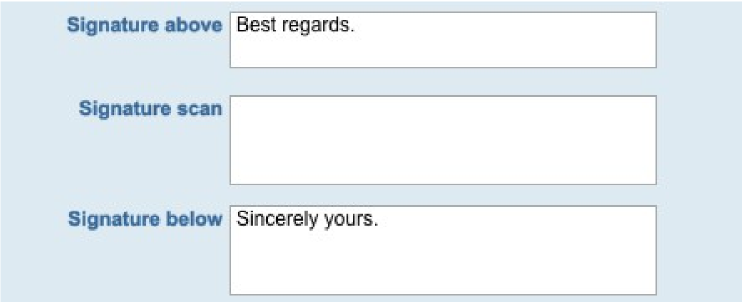
Mail can be deleted by clicking the **Delete** button in several places:

- **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 User Info.



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.

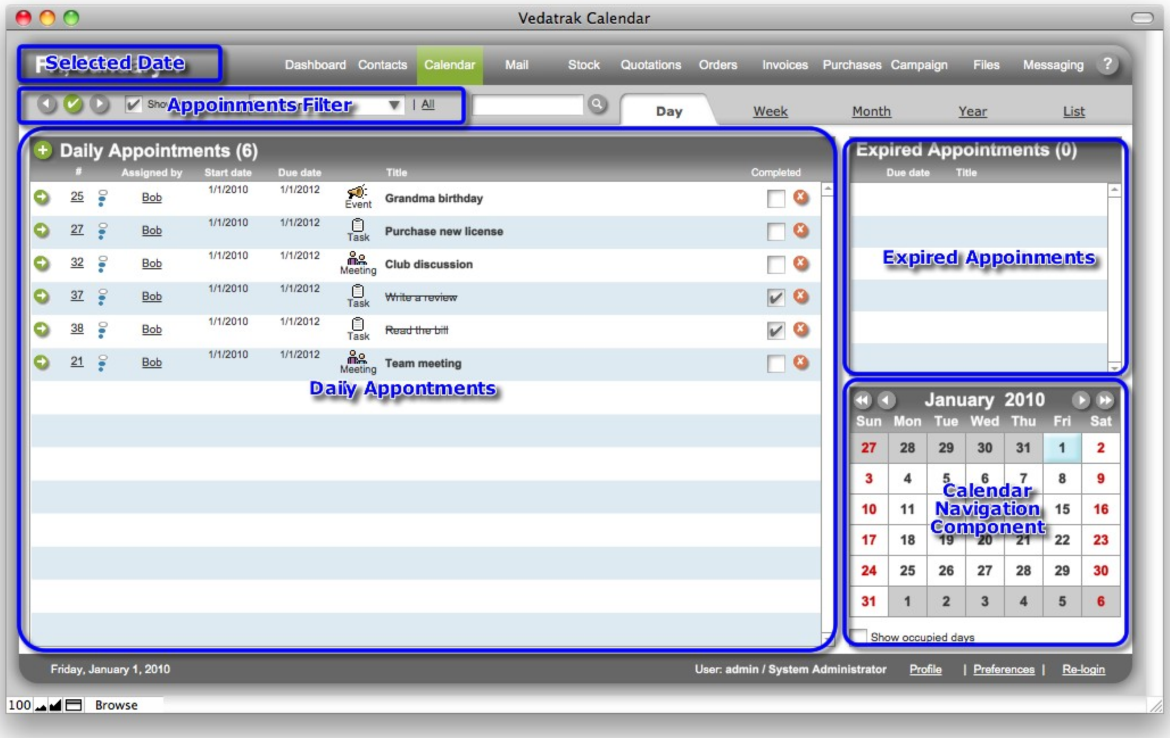
Features

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.

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**.



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. 

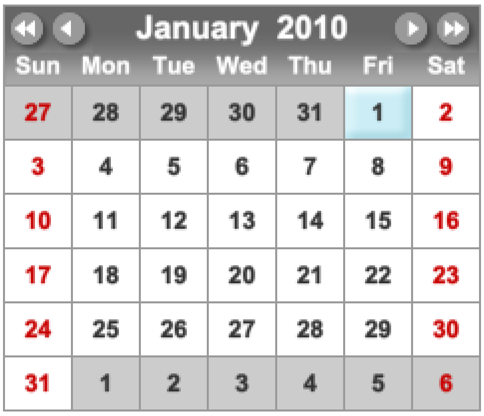
- Appointments for the current user are shown by default. To view other users' appointments, select the user from the **Assigned to** drop down list or click **All** to display appointments for all users. 

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):



- 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 underlined.

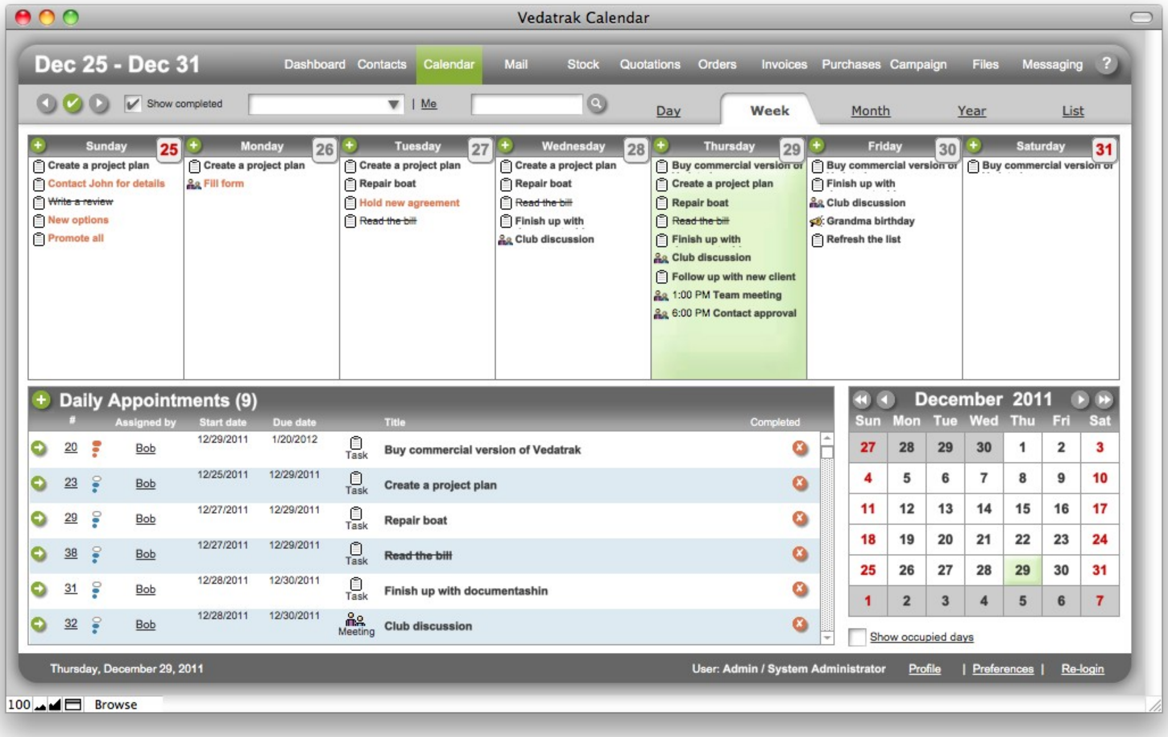
  

Expired Appointments

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

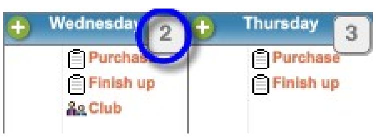
Calendar Week View

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**.



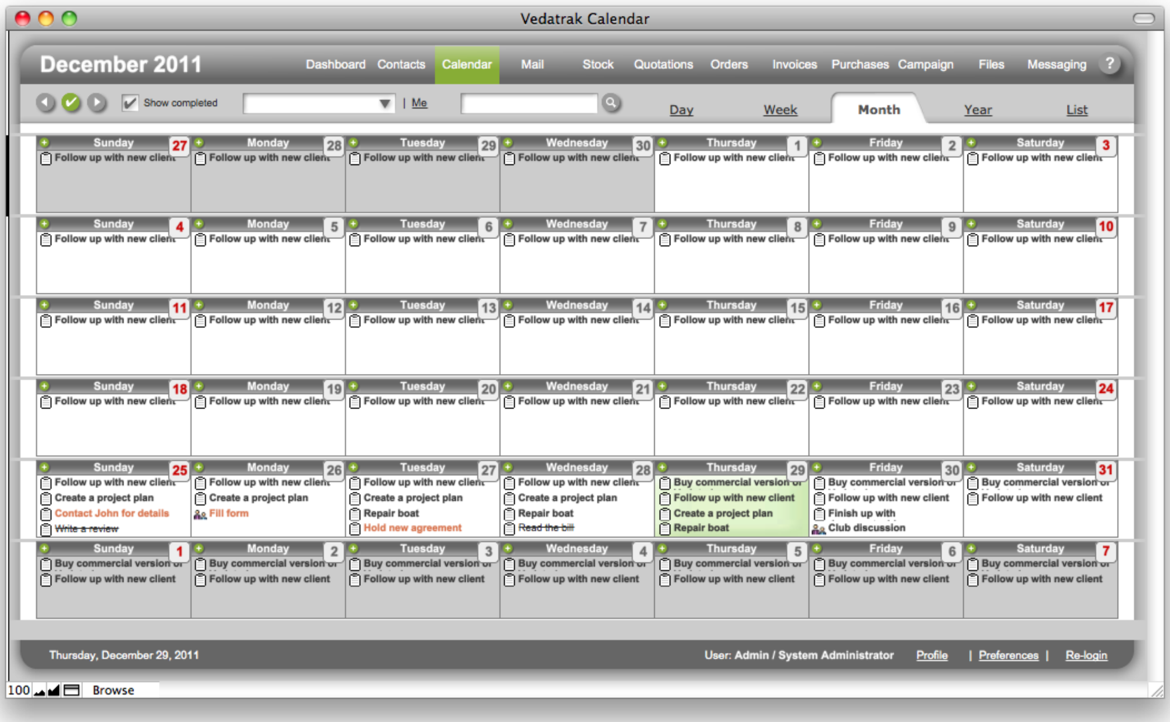
- Switch between weeks using **arrows** or the **Today** button with the **Appointment Filter**.

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



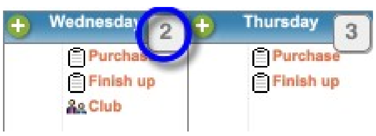
Calendar Month View

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.



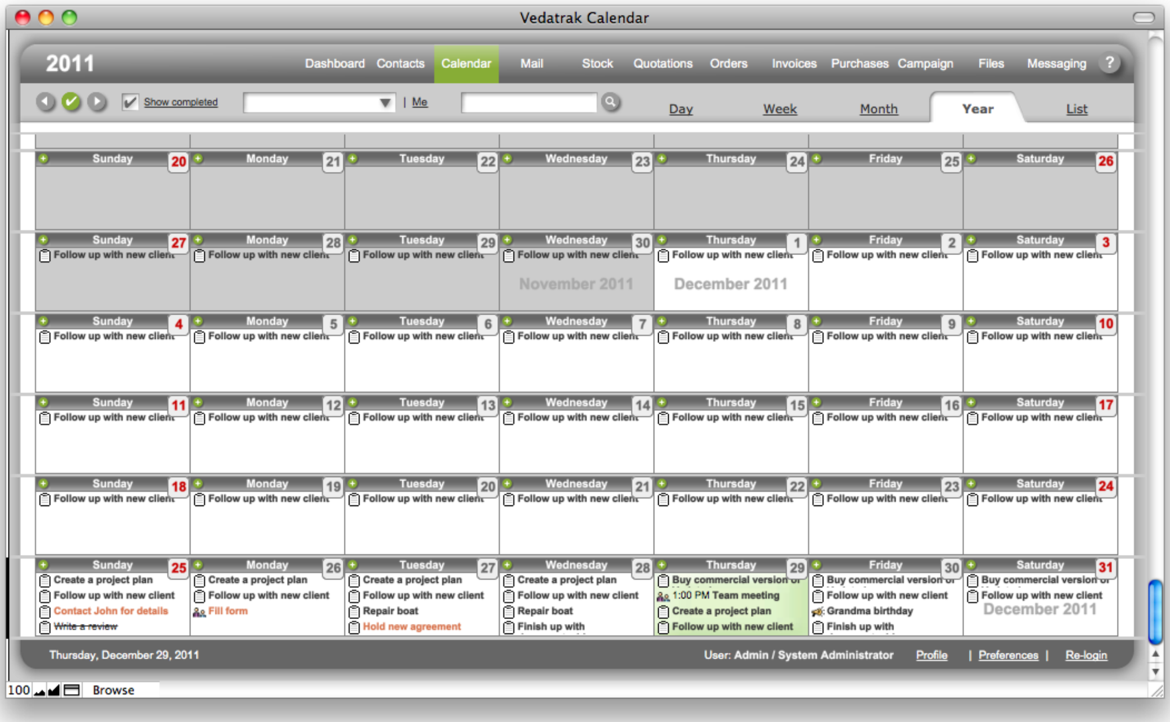
- Switch between months using **arrows** or the **Today** button in the **Appointment Filter**.

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



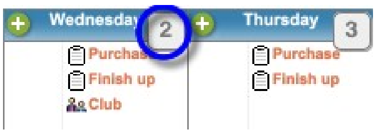
Calendar Year View

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.



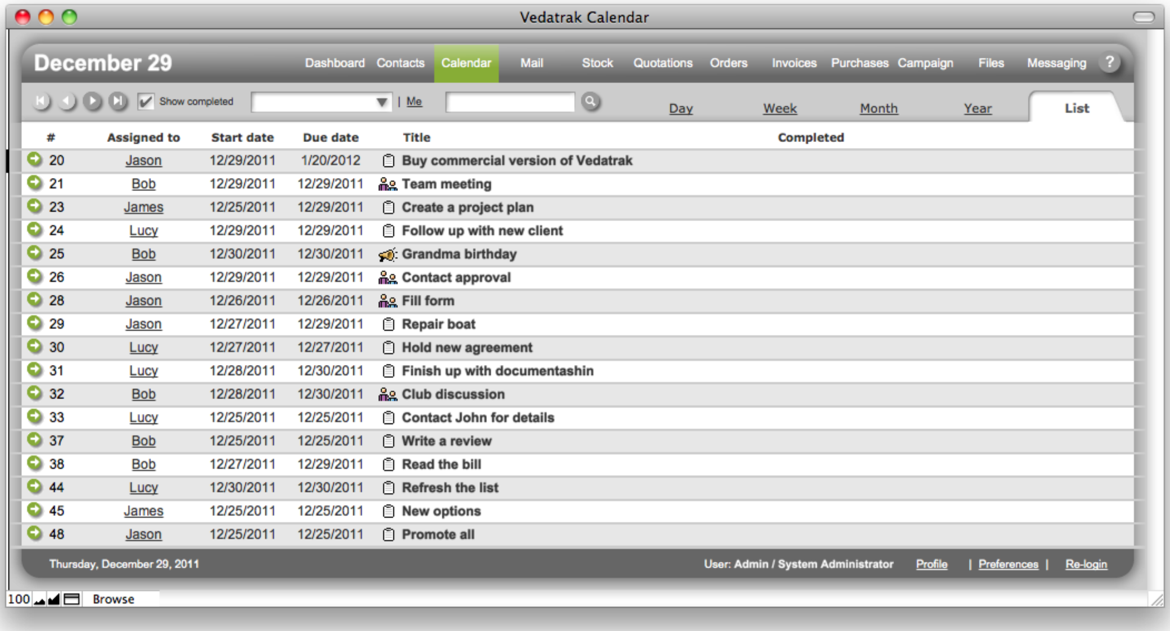
- Switch between years using **arrows** or the **Today** button in the **Appointment Filter**.

- 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.

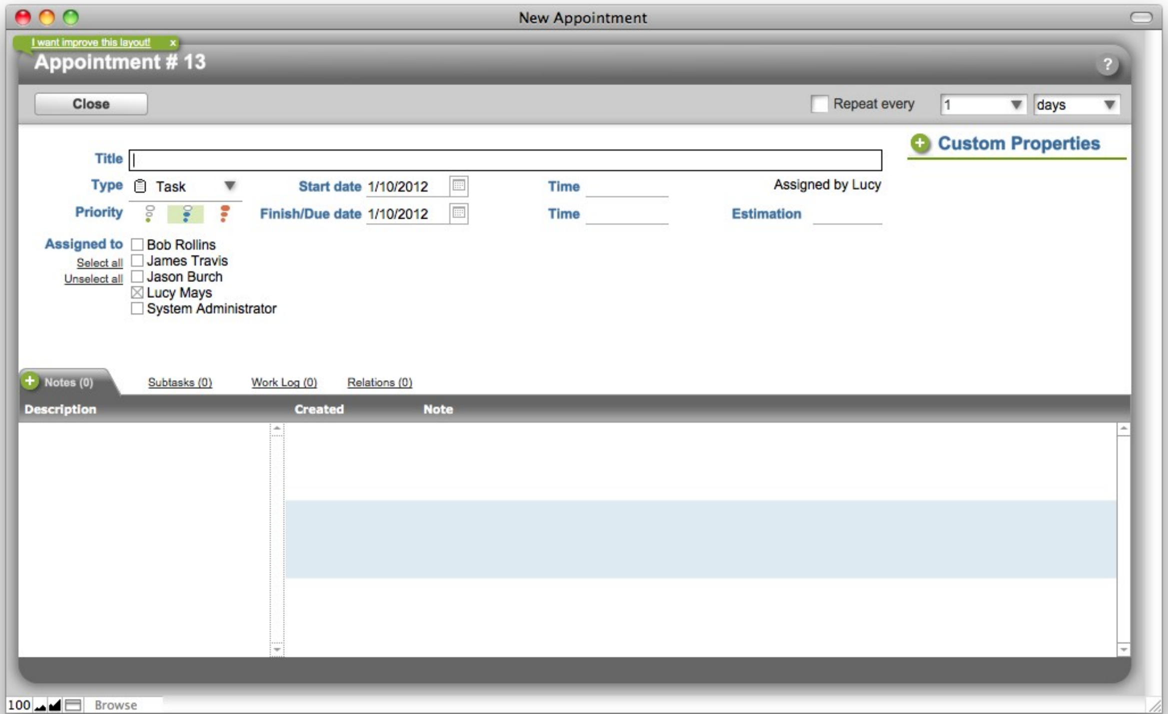


Creating New Appointments

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.

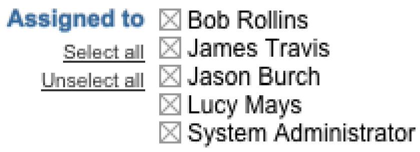
The **New Appointment** window opens:



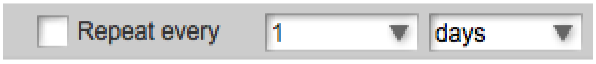
- The **Title** field is visible in all views.
- The **Type** field is shown before the title as an icon. Different icons are used to represent each appointment type.

  Task Meeting Event

- **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.



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



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

- Click the **Close** button 

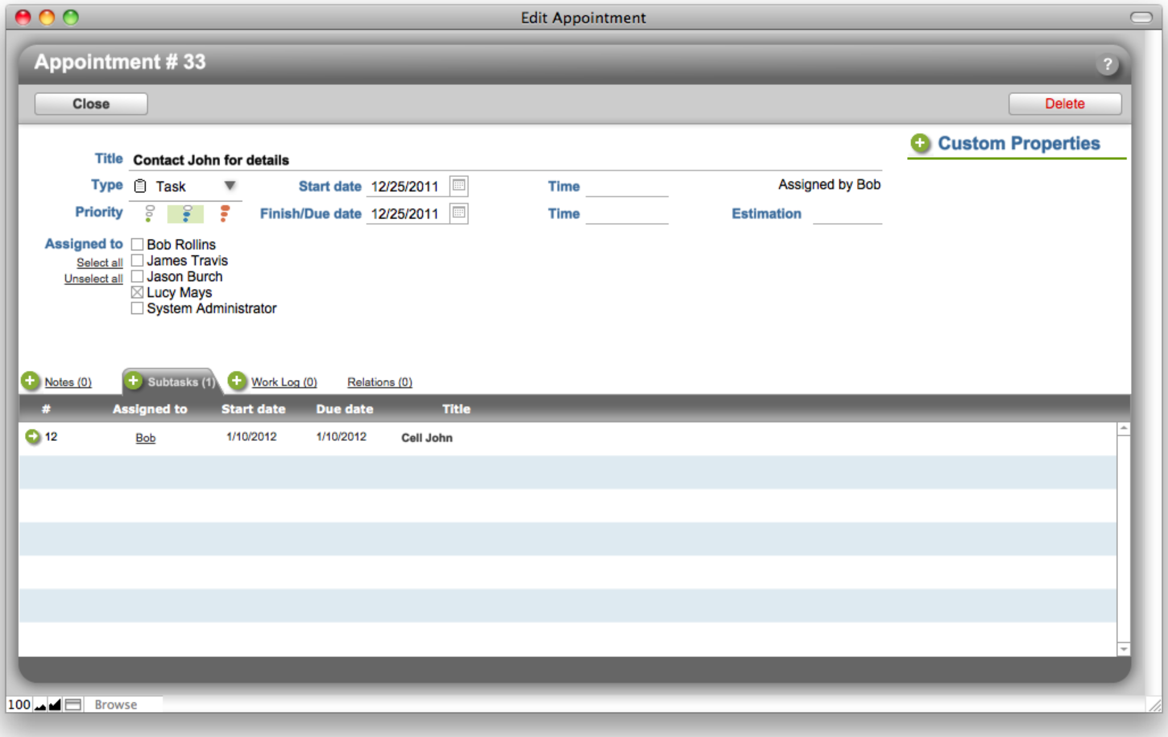
 to save the appointment and close the window.

Viewing and Editing Appointments

Appointments can be viewed and edited in several places:

- **Calendar Day View** and **Dashboard**: Click **Edit/View** near 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** near the appointment to view and edit linked appointments.

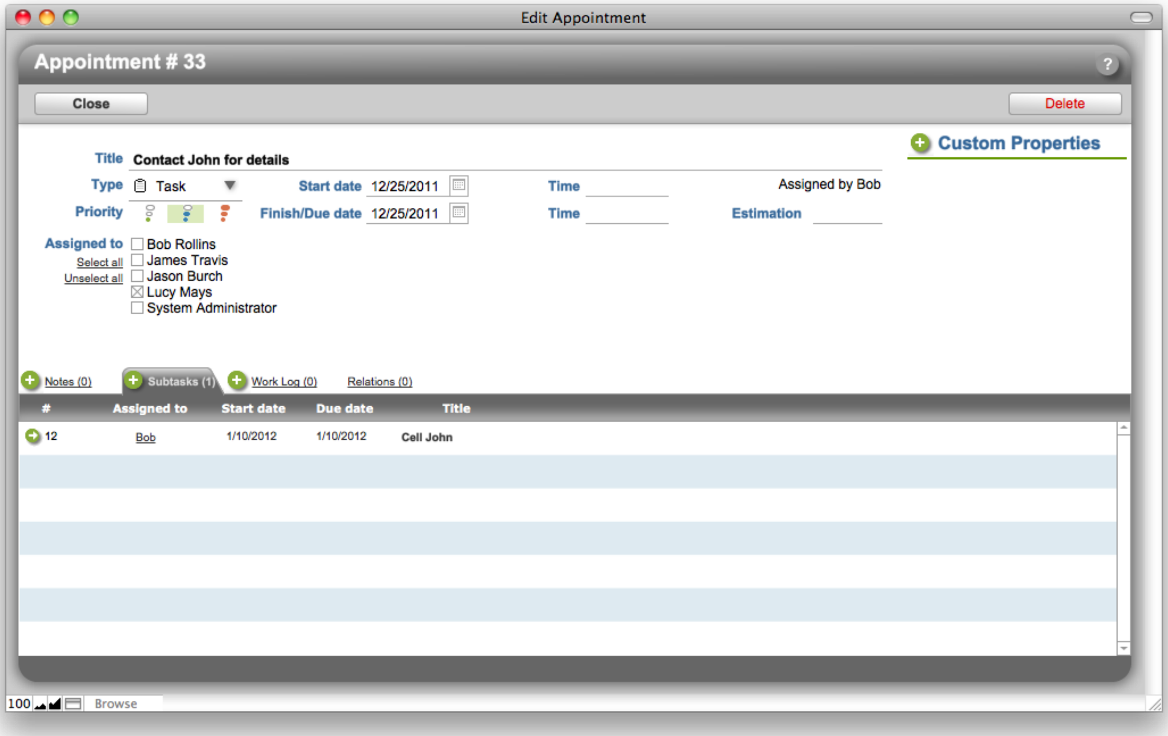
The **Edit Appointment** window opens:



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

Creating Subtasks

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



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

Deleting Appointments

Appointments can be deleted in several places:

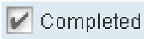
- **Calendar Day View** and **Dashboard**: Click **Delete**  to the right of the appointment.
- Open the appointment to edit and click the **Delete** button.

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  to the right of the appointment
- Open the appointment to edit, then check the **Completed** check box  at the top of the window.

If e-mail notifications 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 User Info.

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 underlined in the Calendar Navigation Component.
- 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

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

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** .

- Select the MultiLang **Label Id** from the # drop down list and insert the picture in the **Graphics** field.

- Click **Delete** 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.

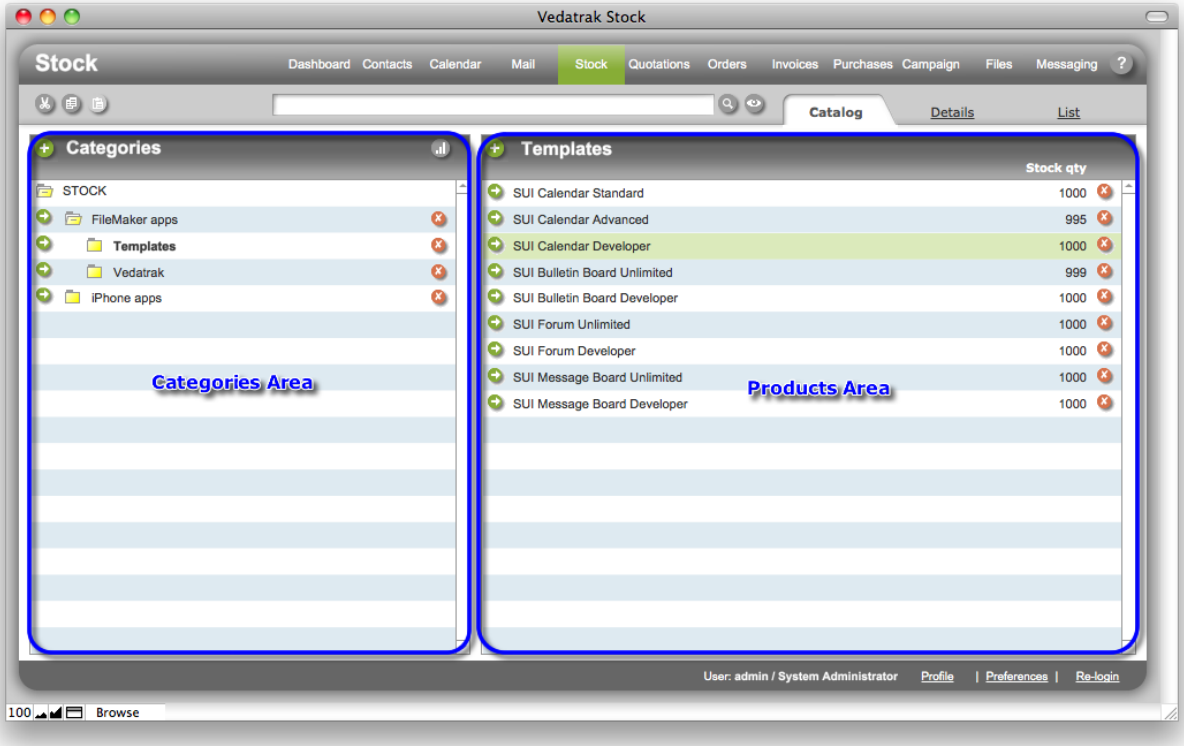
- **Multiple vendors**
  You can define several vendor contacts for each product. Store actual prices of all vendors and just select the best one.

- **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.



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** 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

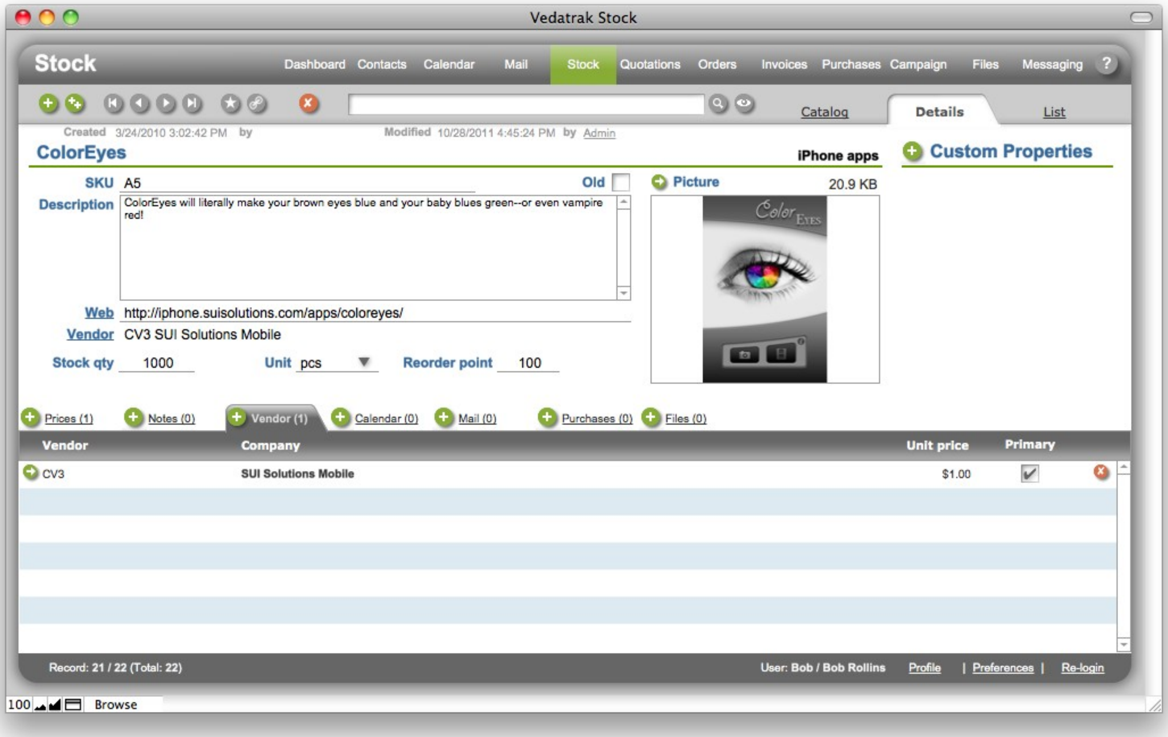
The **Products Area** displays information about products in each selected category.

- To create a new product in a selected category, click **New** .
- To edit a product, click **Edit/View** 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

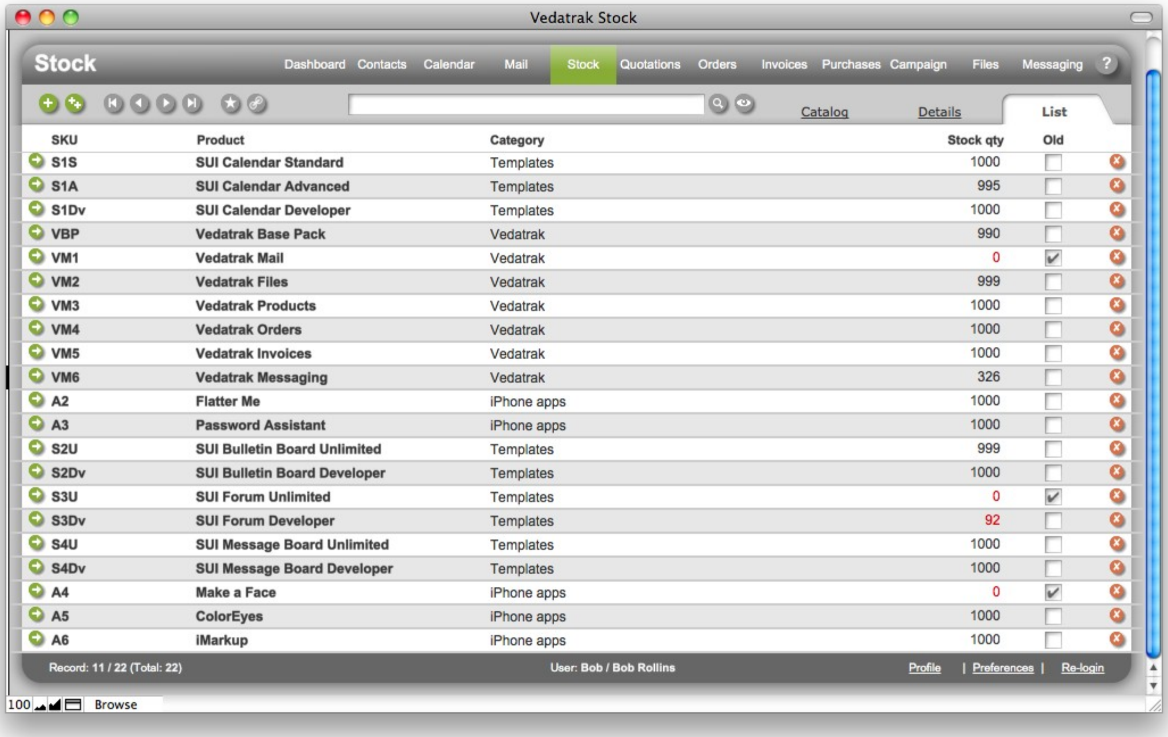
Stock Detail View allows users to review and edit product information.



- 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 Contacts 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.



Creating New Products

New products can be created by clicking **New** 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** 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 User Info.

- 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.

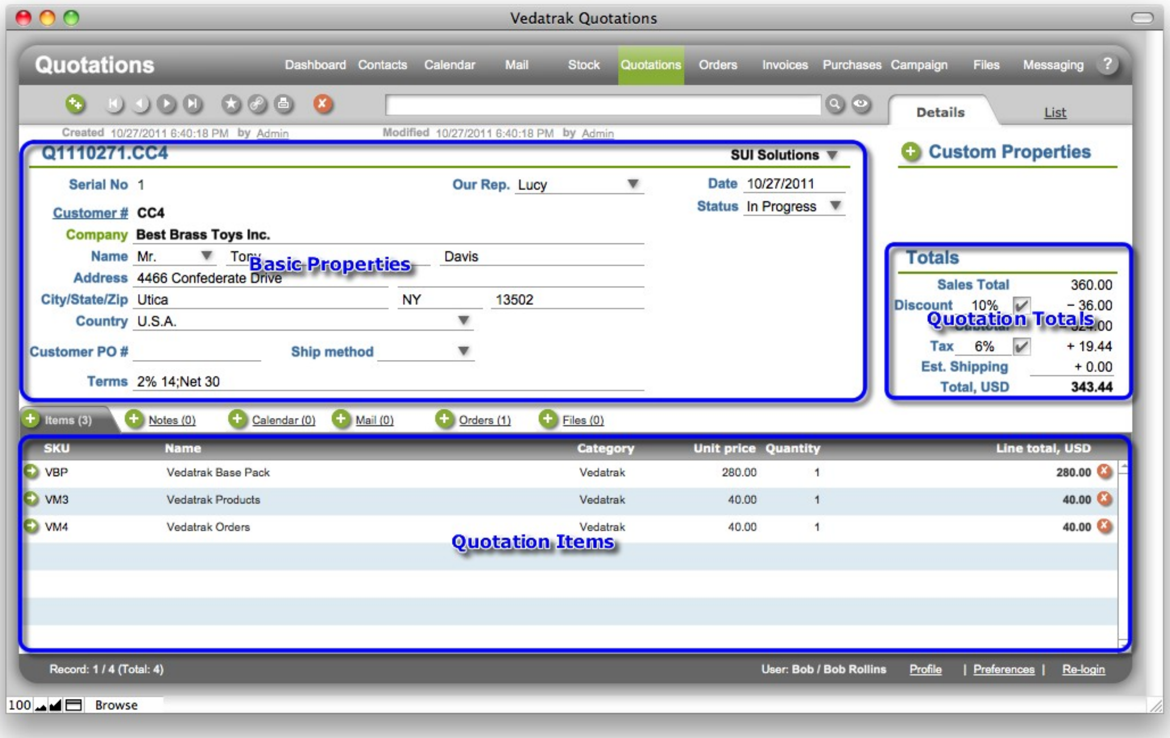
- **Simple Quote retrieval**
  All quotes are linked to the corresponding contact and can be easily found within the contact's card.

- **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.



Basic Properties

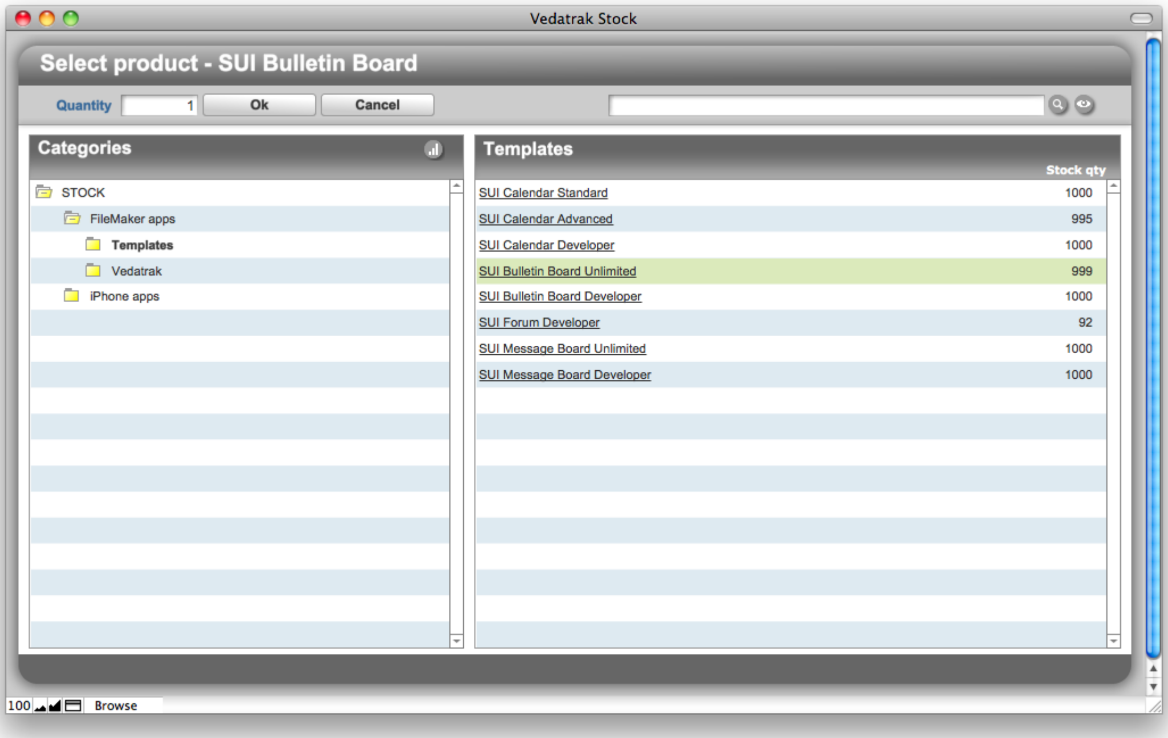
- A unique Quotation **#** is generated automatically upon order creation. Users may change the field if necessary.
- If your company operates more than one **Brand**, select the appropriate brand from the drop down list.
- A unique **Serial No** is generated automatically upon order creation.
- To change 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 Stock is installed, the **Select product** window appears. You may select an existing product from the product catalog.



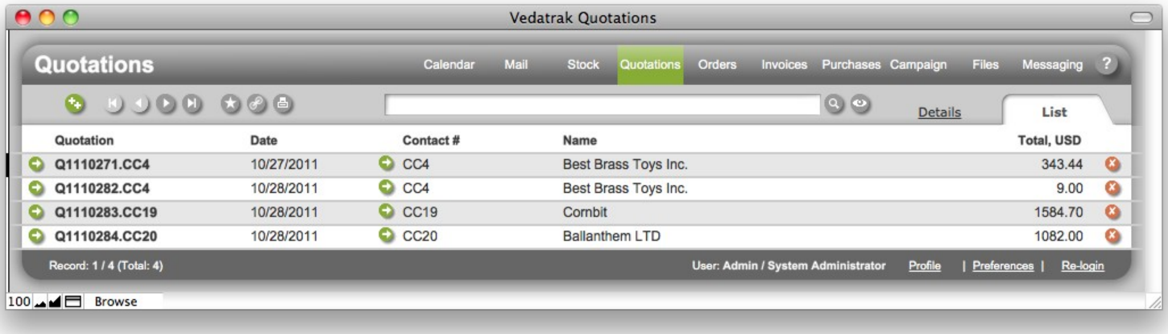
- Click the **Delete** button to delete the item.

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 Quotations Preferences. 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.



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

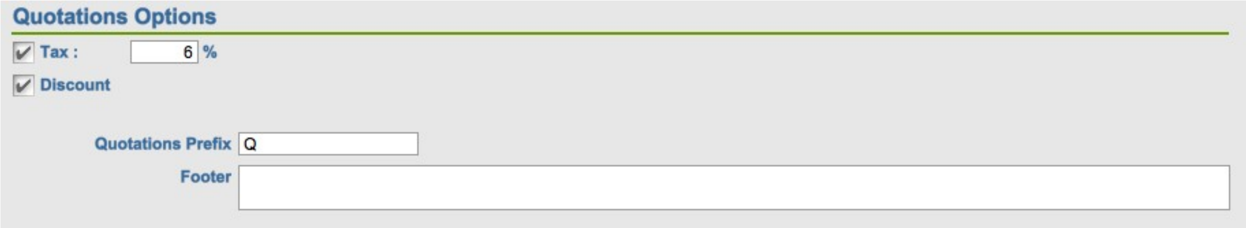
Quotations can be deleted by clicking **Delete**  in several places:

- **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 System Administrator to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in User Info.



- 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

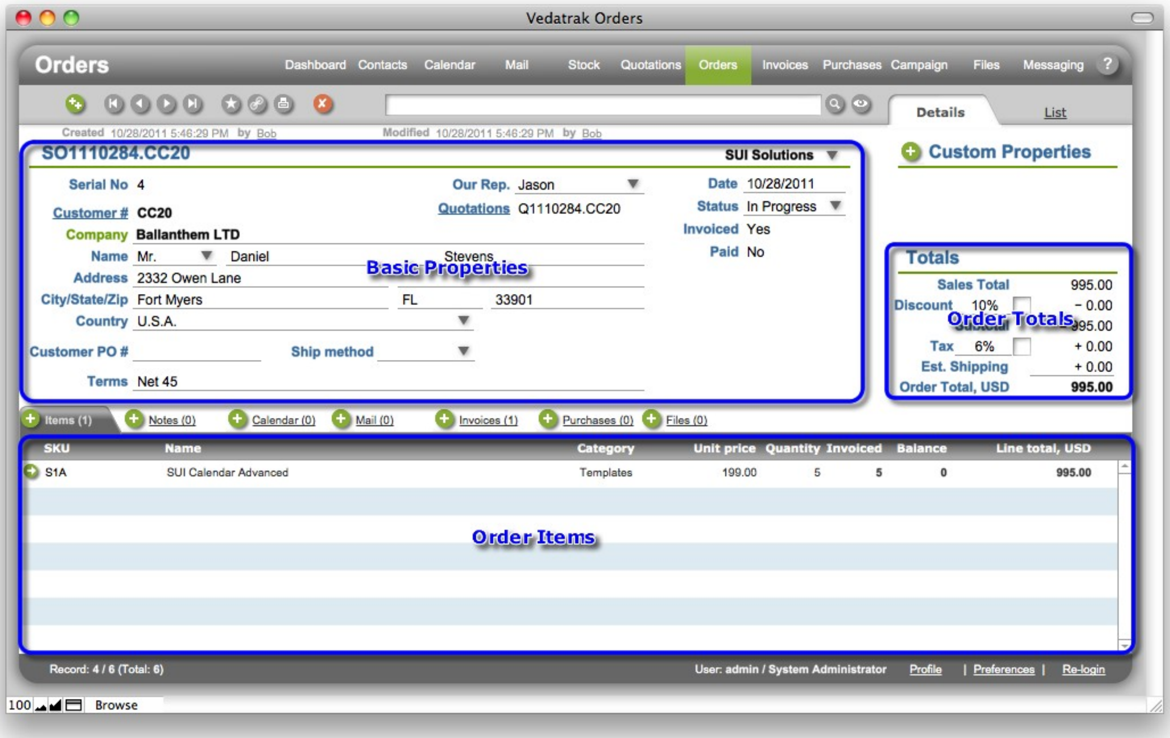
The **Orders** module supports the sales process by tracking order history and organizing data for each sale, including associated costs and sell prices.

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.



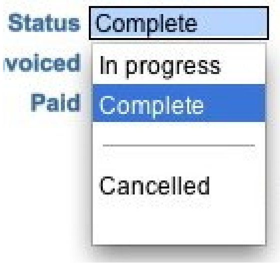
Basic Properties

- A unique **Order #** 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.

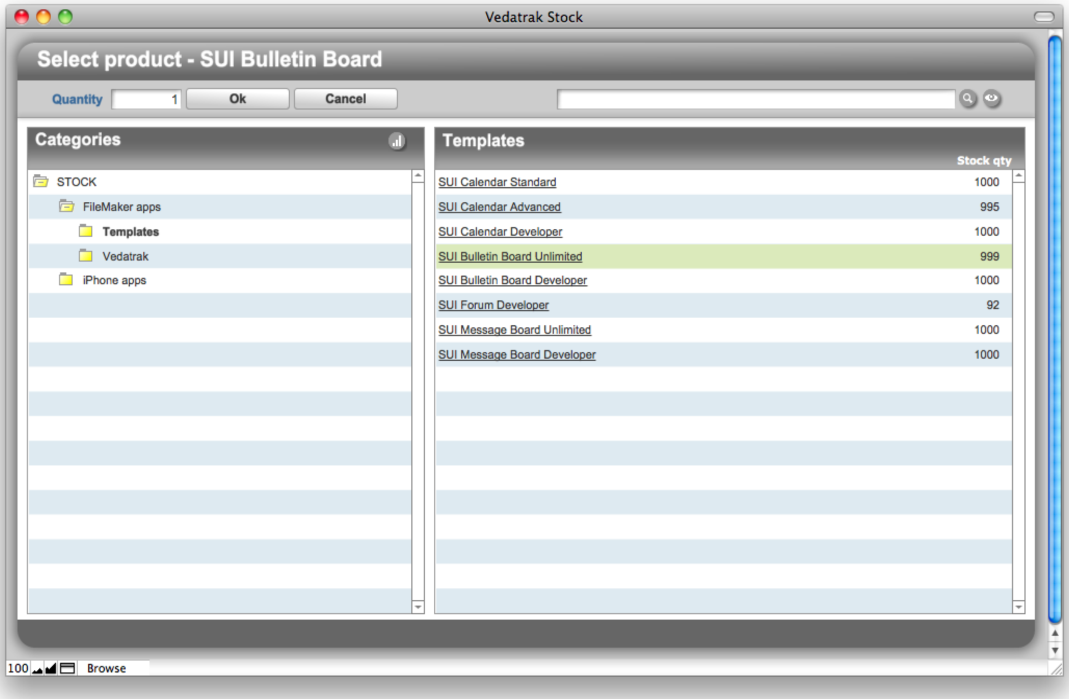


- The **Invoiced** and **Paid** fields are generated automatically using values in the related **Invoice**.

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 Stock is installed, the **Select product** window appears. You may select an existing product from the product catalog



- Click the **Delete** button  to delete the item.

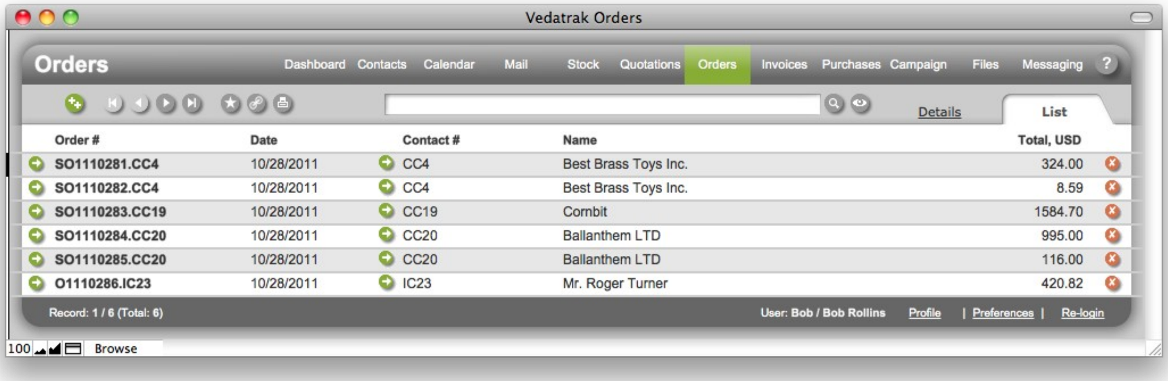
  Note: An item may not be deleted if it has been **Invoiced**.

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 Orders Preferences. 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.



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

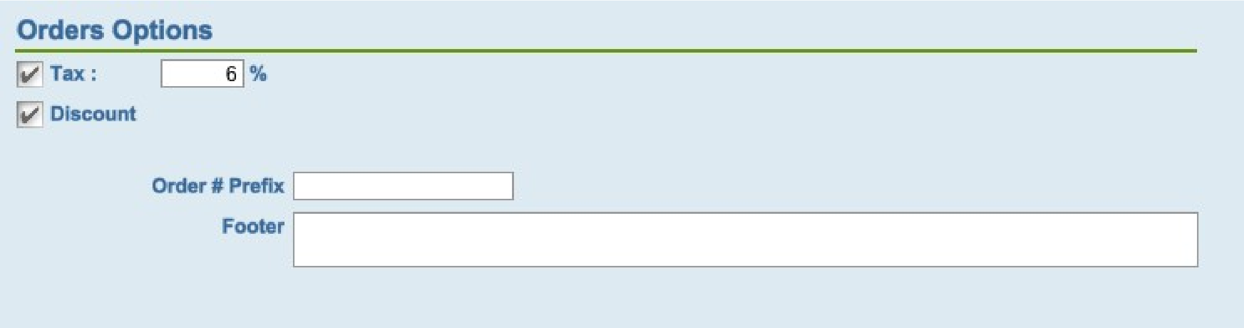
Orders can be deleted by clicking **Delete** in several places:

- **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 System Administrator to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in User Info.



- 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

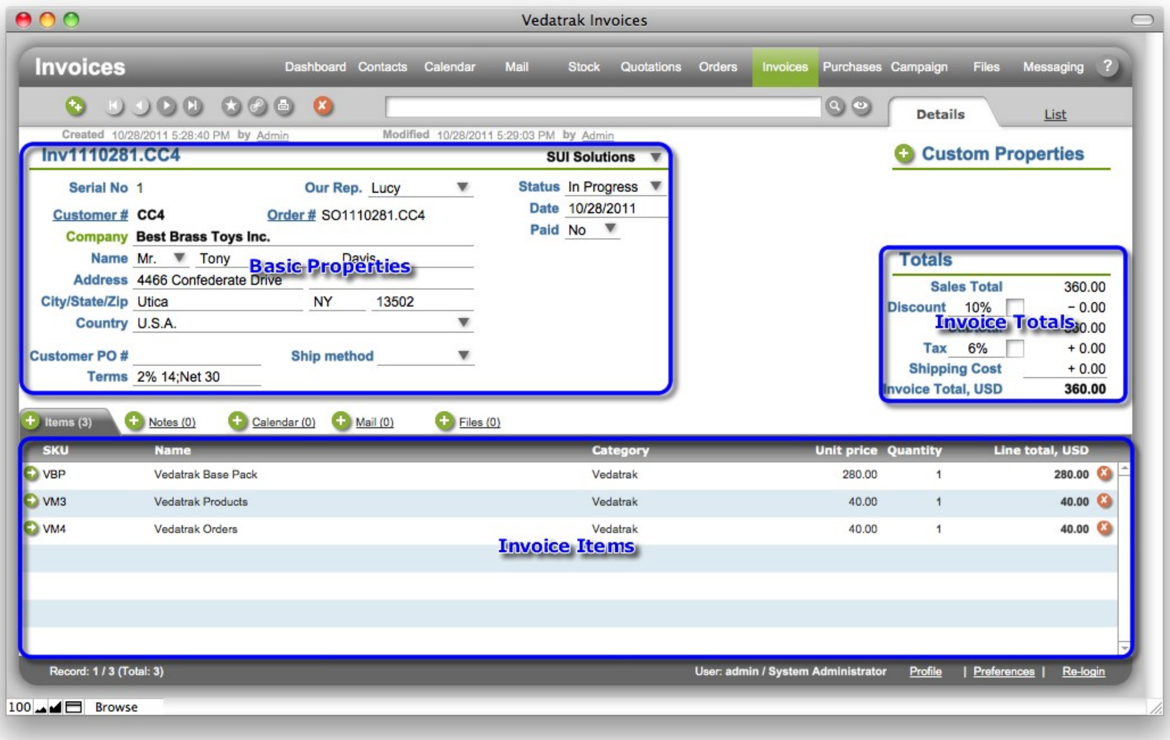
The **Invoices** module supports invoice management and the creation of printable invoices to send to your customers. Invoices can easily be created directly from any open order.

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.



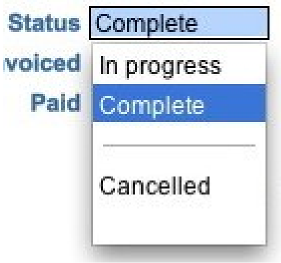
Basic Properties

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

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

- 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.



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

Invoice Items

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

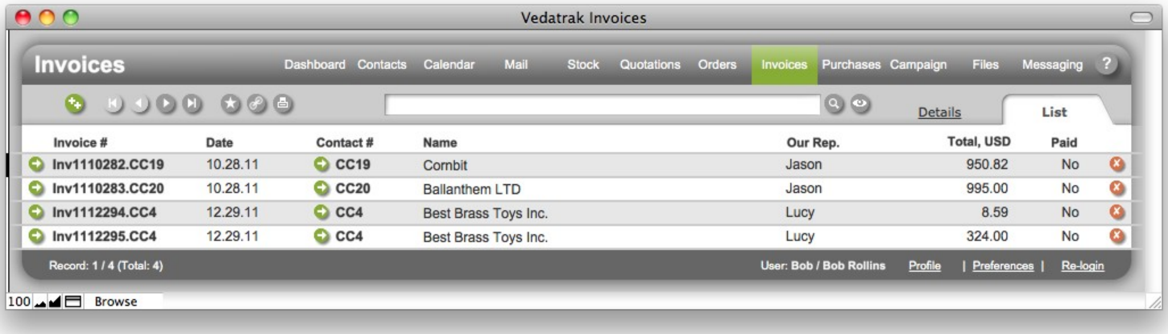
- To add a new item, click the **New**  in the **Items** tab.
- Click **Delete**  to delete the item.
  Note: *An invoice may not be deleted if it has been paid.*

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 Invoice Preferences. You can disable **Tax** by clicking the corresponding check box.
- Use the **Est. Shipping** field to enter the delivery price.

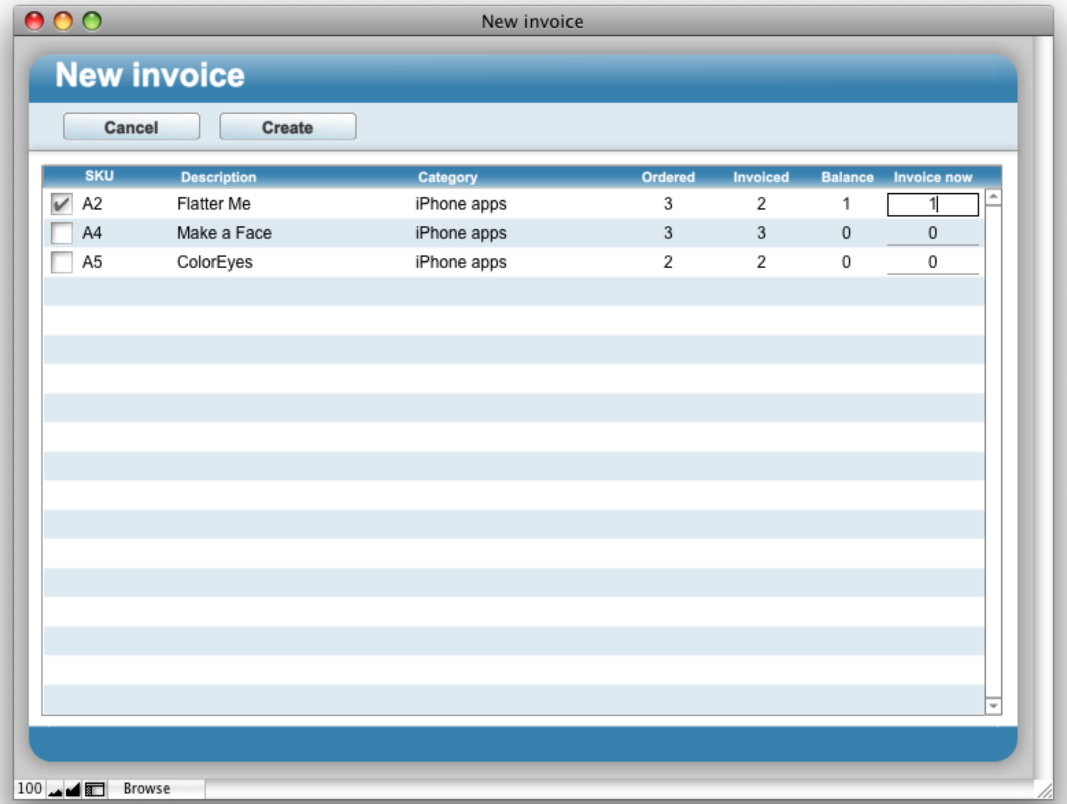
Invoices List View

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



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**:



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

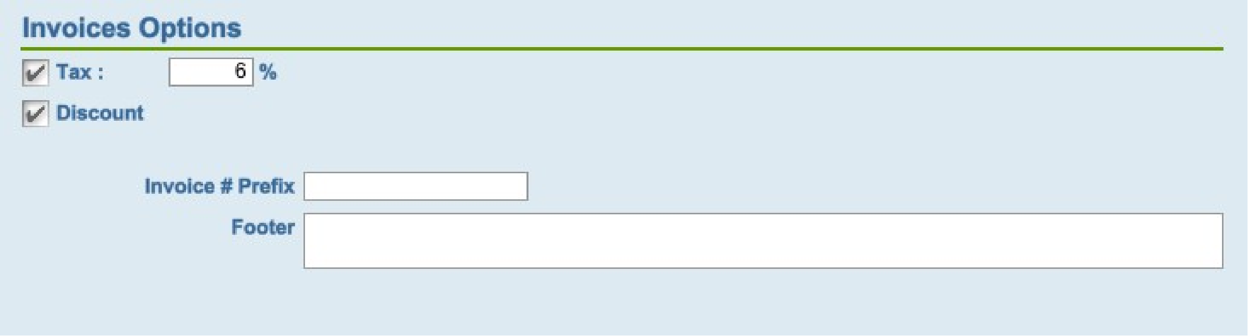
Invoices can be deleted by clicking **Delete** in several places:

- **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 System Administrator to edit default settings. To change the preferences, click **Preferences** in User Info.



- 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.

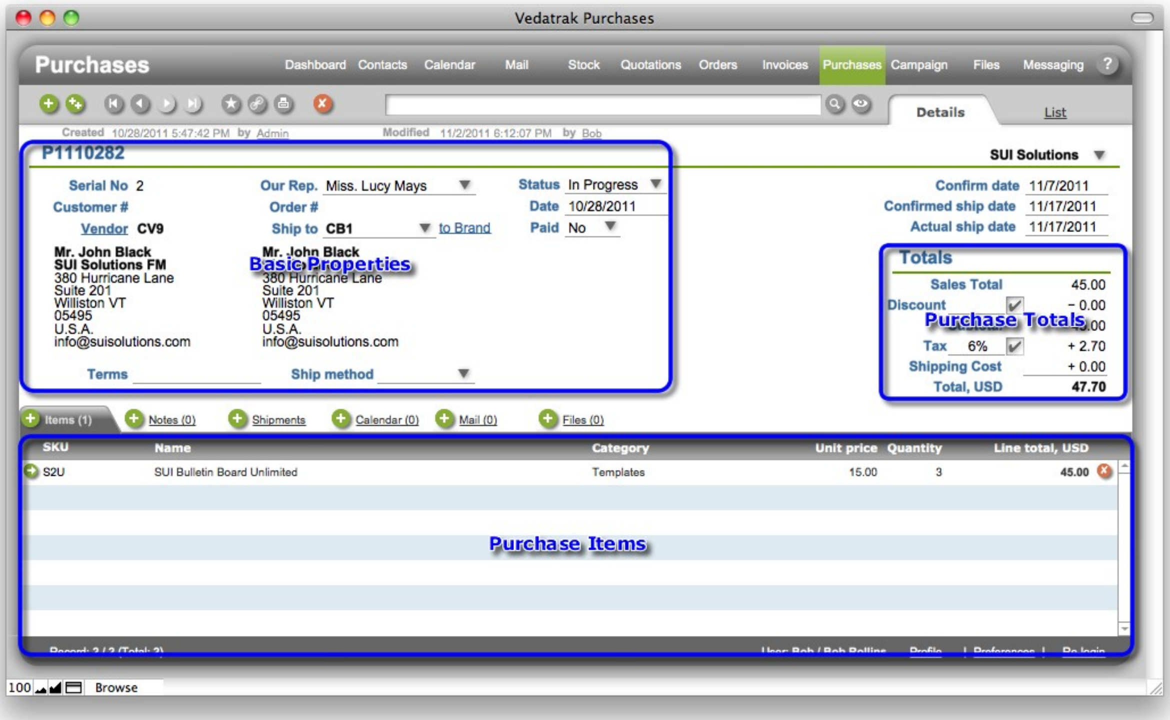
- **Shipping tracking info**
  This feature allows you to get tracking info of largest logistical companies using packages tracking number only. Just enter number and company name - FedEx, UPS or DHL- and click the **Track** button.

- **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.

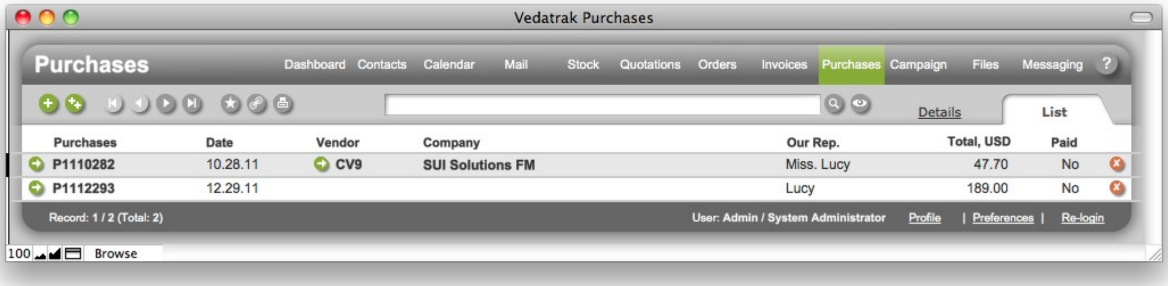
Purchases Detail View

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.



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

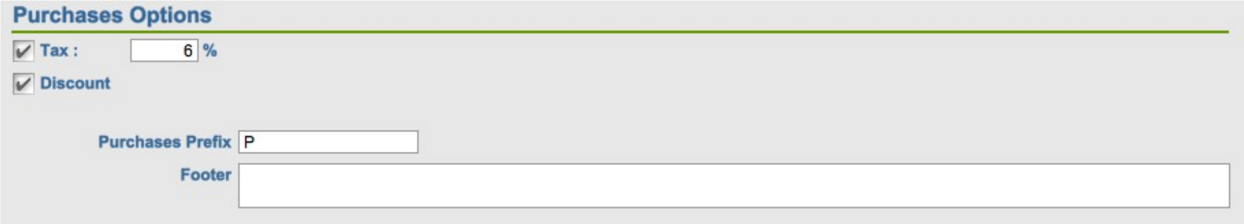
Purchases can be deleted by clicking **Delete** in several places:

- **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 System Administrator to edit Vedatrak's system default settings. To change the preferences, click the **Preferences** button in User Info.



- 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.

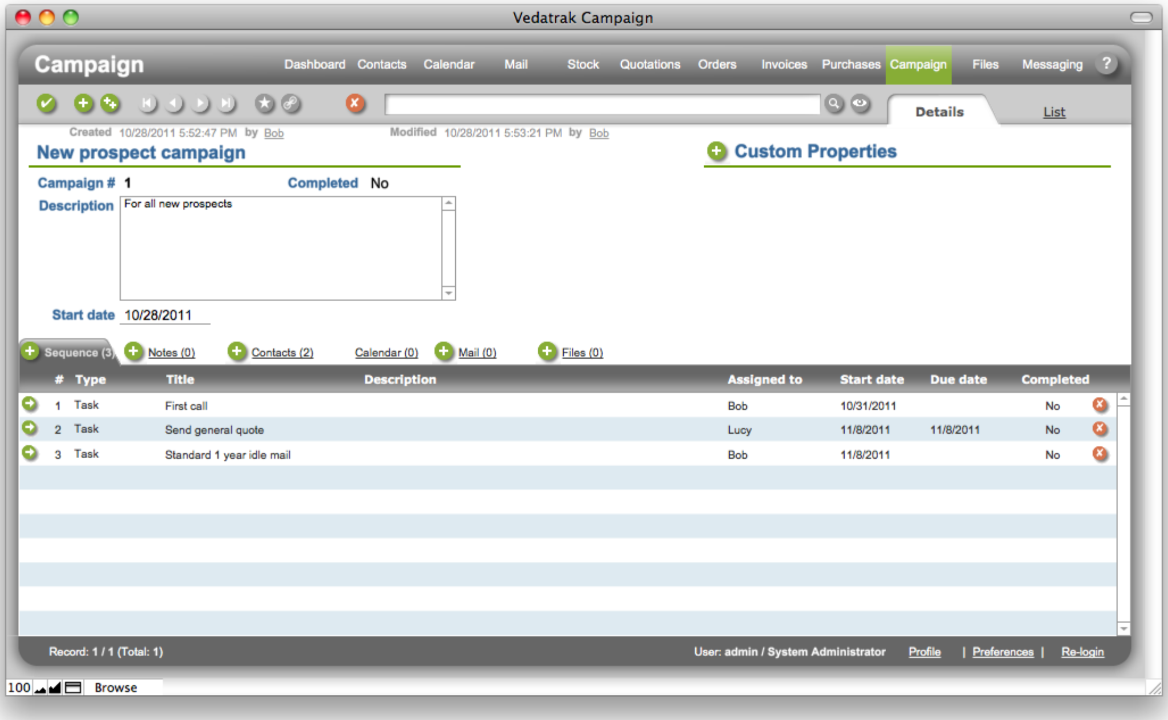
- **Campaign Sequences**
  Define campaign steps with description, start date, end date and executive properties.

- **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.

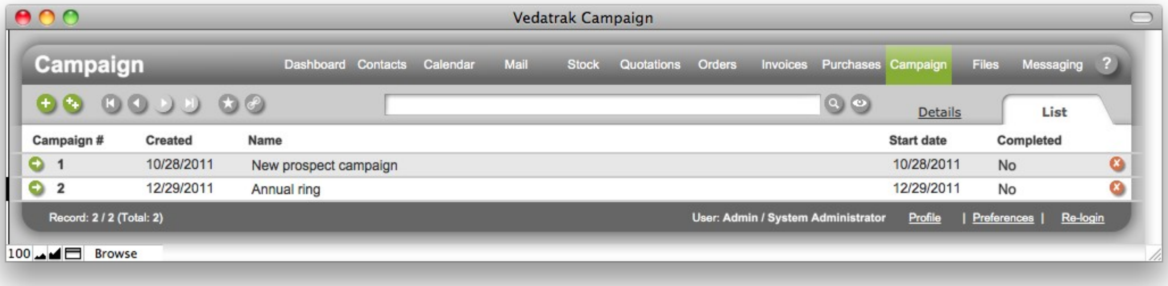
Campaign Detail View

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



Campaign List View

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



Creating New Campaigns

A new campaign can be created by clicking **New** 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** 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

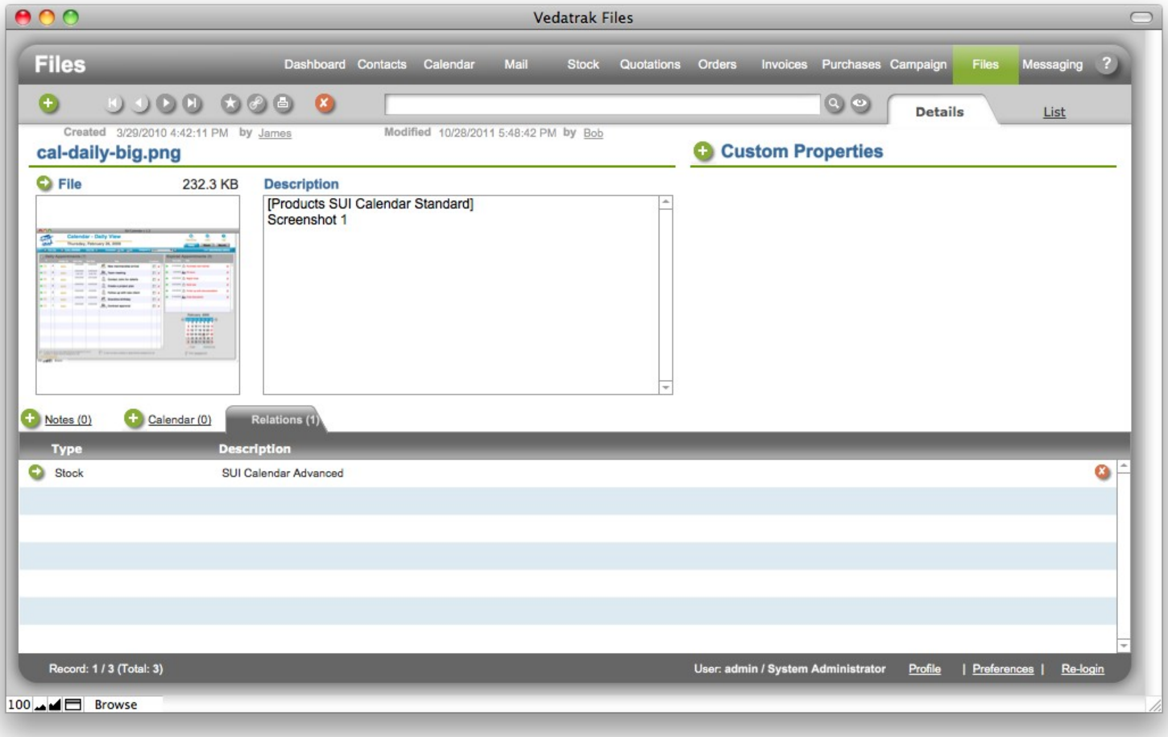
The **Files** module allows users to store documents and other files, like images and sounds, directly within the database. Each file can be linked to any location within Vedatrak. A sales rep, for example, can link a quotation spreadsheet to a specific contact or appointment.

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

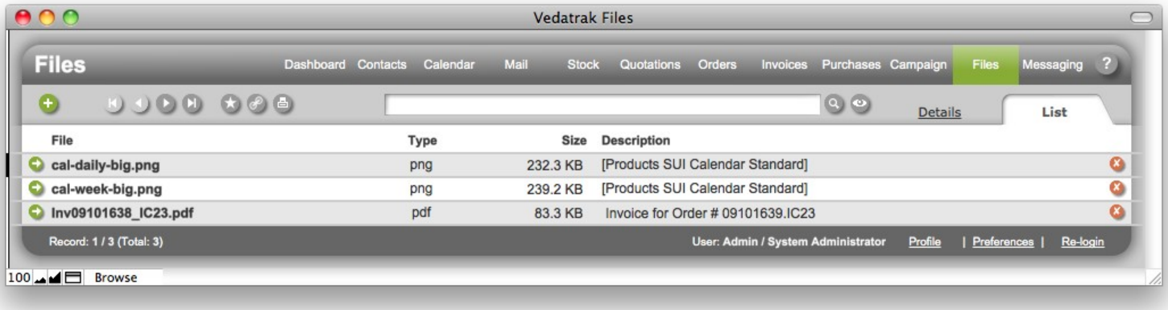
Files Detail View allows users to view and edit properties for the selected file.



- 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.

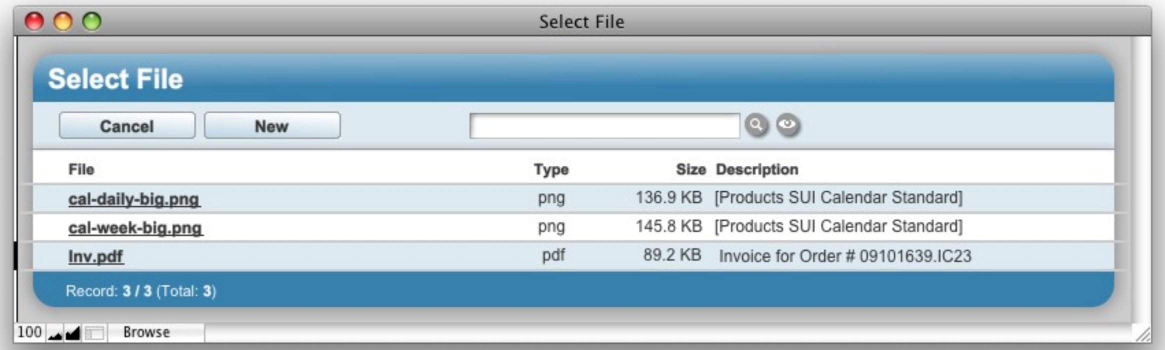


Selecting and Creating New Files

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**



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** 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

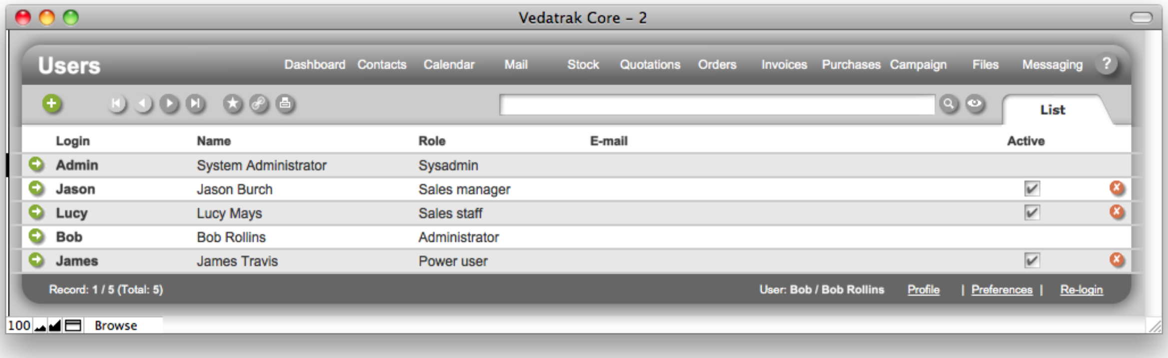
Users is a convenient tool that simplifies account management for the entire system.

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

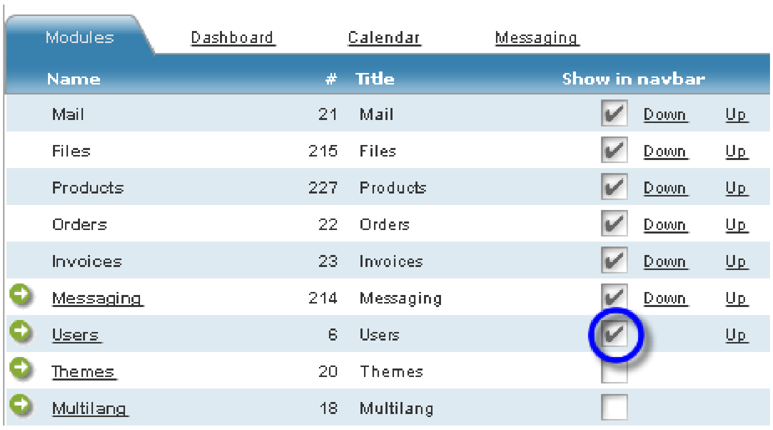
Users List View is used to view and search for users. Each user has an individual User Profile including **Login**, **Name**, Role, **E-mail**, **Photo**, **Signature scan** and the **Active** status.



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

- Click the **Users** button in the Service Modules navigation bar in **Dashboard**.
  Note: *This feature is limited to the System Administrator and Administrator.*

- Configure your system default Navigation Bar to view the **Users** module and conveniently access the **Users** using standard **Navigation Bar,**



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**.

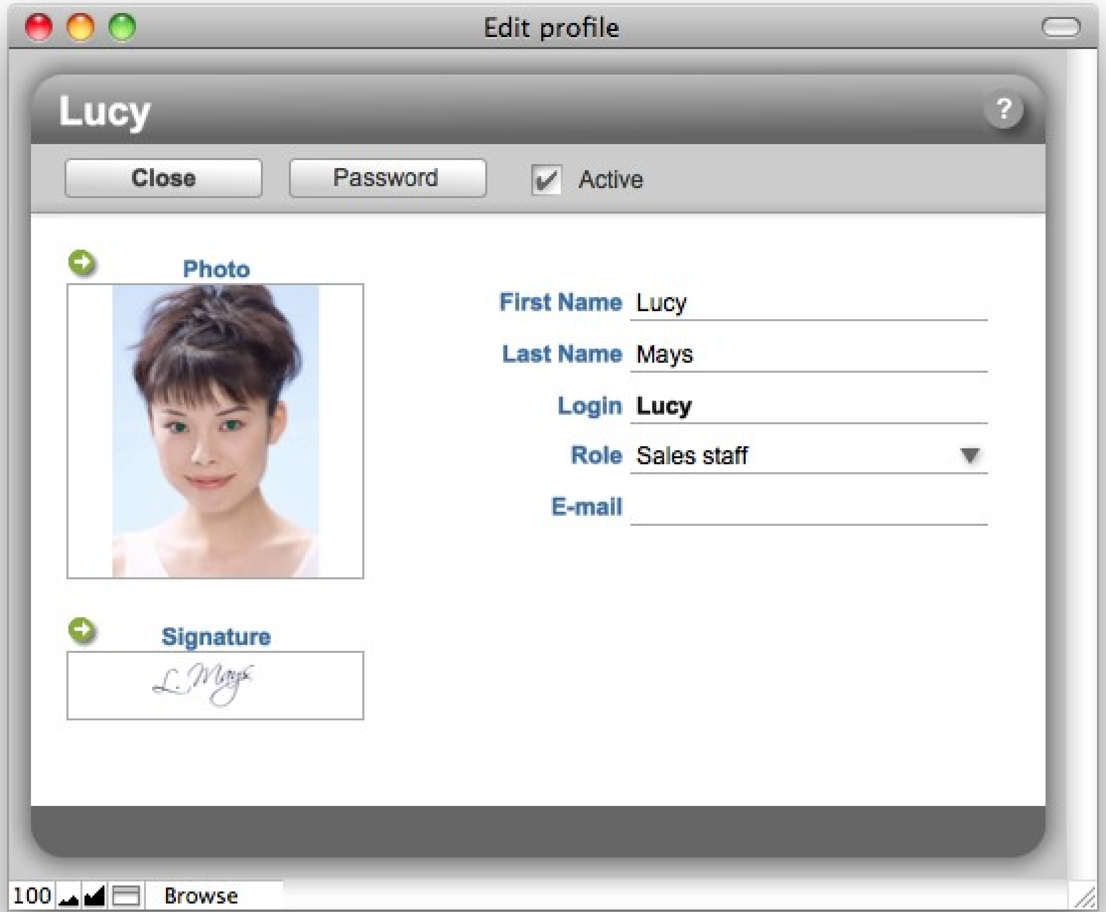
When the **Edit profile** window appears, enter the new user's data

Editing User Profile

User Profile can be edited in multiple ways:

- User Info: 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**  next to the user to edit a set of users.

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



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** near the user to view a found set of users.

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

Click **Close** to close the window.

Changing User Password

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

Click **Close** Close to close the window.

Deleting Users

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

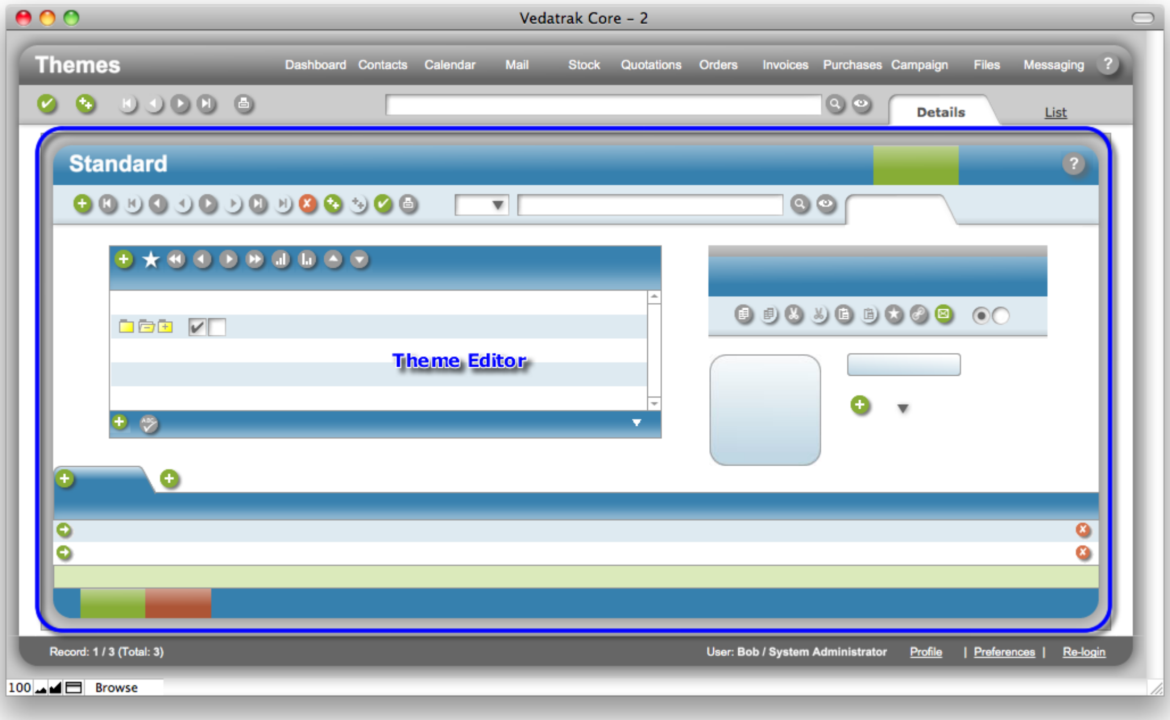
The **Themes** module is used to personalize Vedatrak's appearance. Users can adjust different graphic elements including colors, button styles or icons. These changes will be applied to every module.

Features

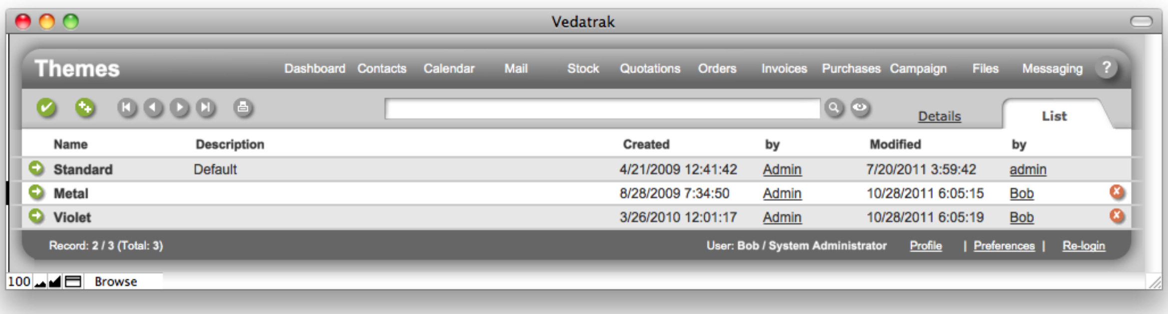
- **Multiple Themes**
  Choose from existing themes or create themes of your own.
- **User Specific Themes**
  Each user can select and store a theme within Preferences.
- **Special Themes**
  Administrators can create special themes for holidays and for special corporate events.

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.

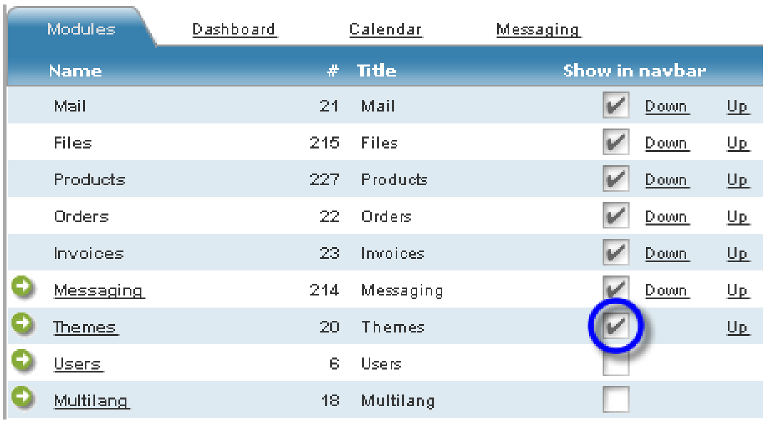


Users may access the **Themes** module in multiple ways:

- Click the **Themes** button in the Service Modules navigation bar in **Dashboard**.
  Note: *This feature is limited to the System Administrator and Administrator.*

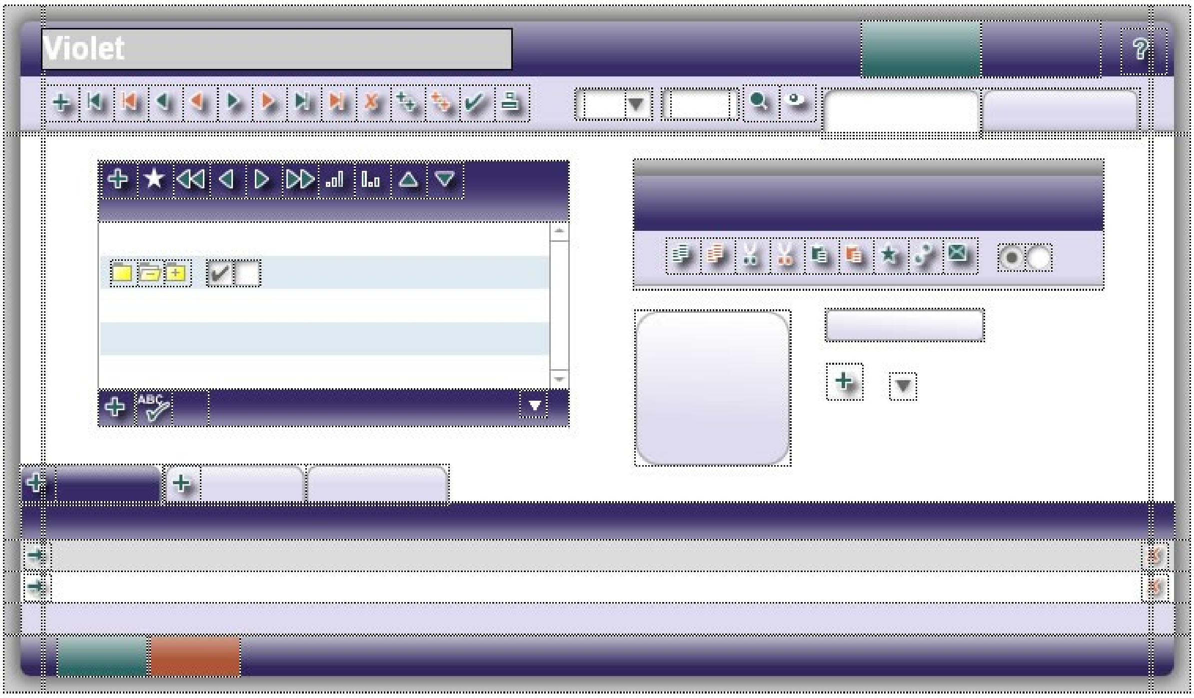
- Configure your system default Navigation Bar to view the **Themes** module and conveniently access the **Themes** using standard **Navigation Bar**.



- 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.



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 edit the theme.
- Click **Apply**  in the **Tool Bar** to apply the theme.

Deleting Themes

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

Themes can be deleted by clicking **Delete** 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

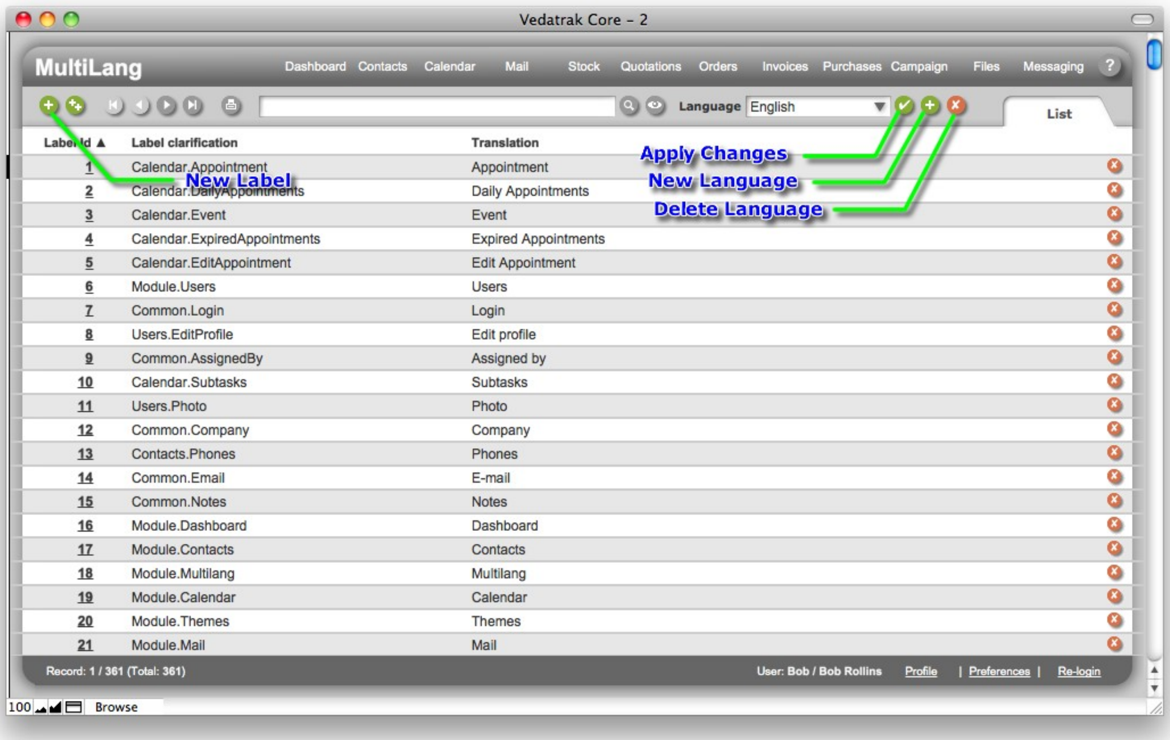
MultiLang adds multilingual support to Vedatrak. While several additional language sets are included with Vedatrak, this useful language editor allows for the creation of additional dictionaries quickly and easily. This module can be used to translate most application elements.

Features

- **One-Touch Language Adjustment**
  Languages may be switched in one touch 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

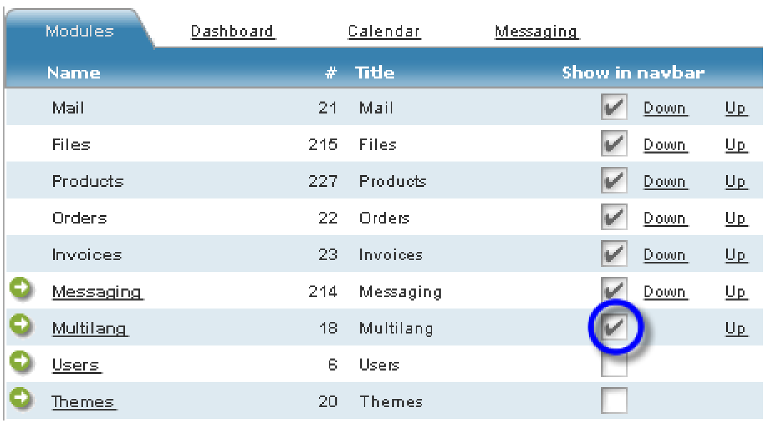
Each user may choose their own language for Vedatrak. Each language has a dictionary with each word used in Vedatrak. **MultiLang List View** allows users to edit the dictionary for the existing languages and create new ones.



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

- Click the **MultiLang** button in the Service Modules navigation bar in **Dashboard**.
  Note: *This feature is limited to the System Administrator and Administrator.*

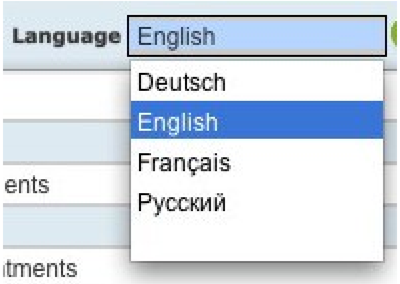
- Configure your system default Navigation Bar to view the **MultiLang** module and conveniently access the **MultiLang** using standard **Navigation Bar**.



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**.



- To modify a dictionary entry, change the contents in the **Translation** column.
- Click **Apply**  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** 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 System Administrator and Administrator. 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

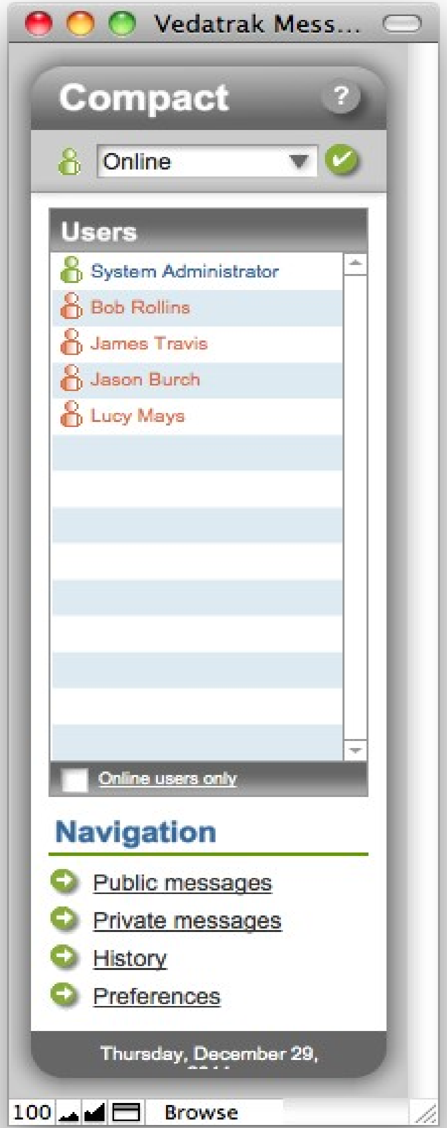
The **Messaging** module makes communication between database users simple with an integrated instant messaging system. Users can even send smart links to objects within the database.

Features

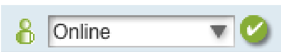
- **Public Messages**
  Users may choose to broadcast messages to all database users.
- **Private Messages**
  Users may select to send messages to a specific user.
- **System Messages**
  System messages will alert users of individuals entering and exiting the **Messaging** module.
- **Sending Smart Links**
  Users can send links to database locations to other users.
- **New Message Notifications**
  Status Bar 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.



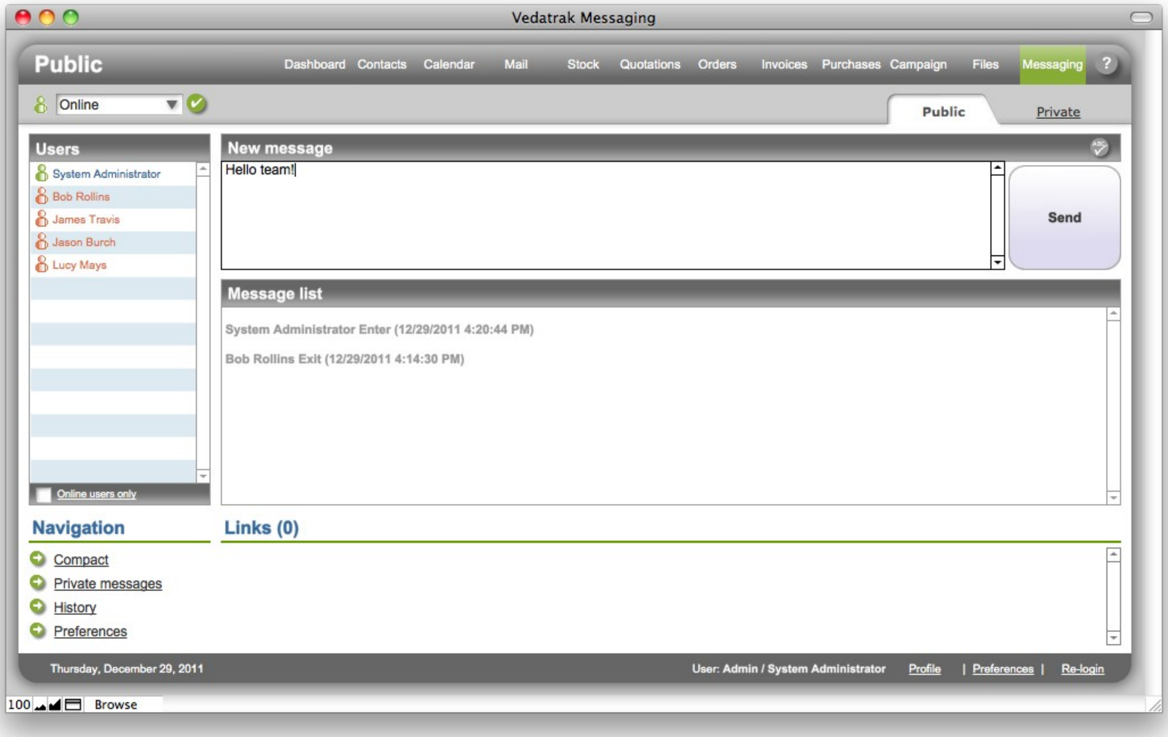
- To change your own status select the **Status** drop down list and click **Apply**.



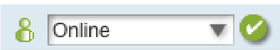
- You can view online and offline database users in the **Users** list. To view online users only, check the **Online users only** box.
- To send a private message to another user, click the user name in the **Users** list.
- To switch to different **Messaging** modes use the **Navigation** area.

Messaging Public View

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



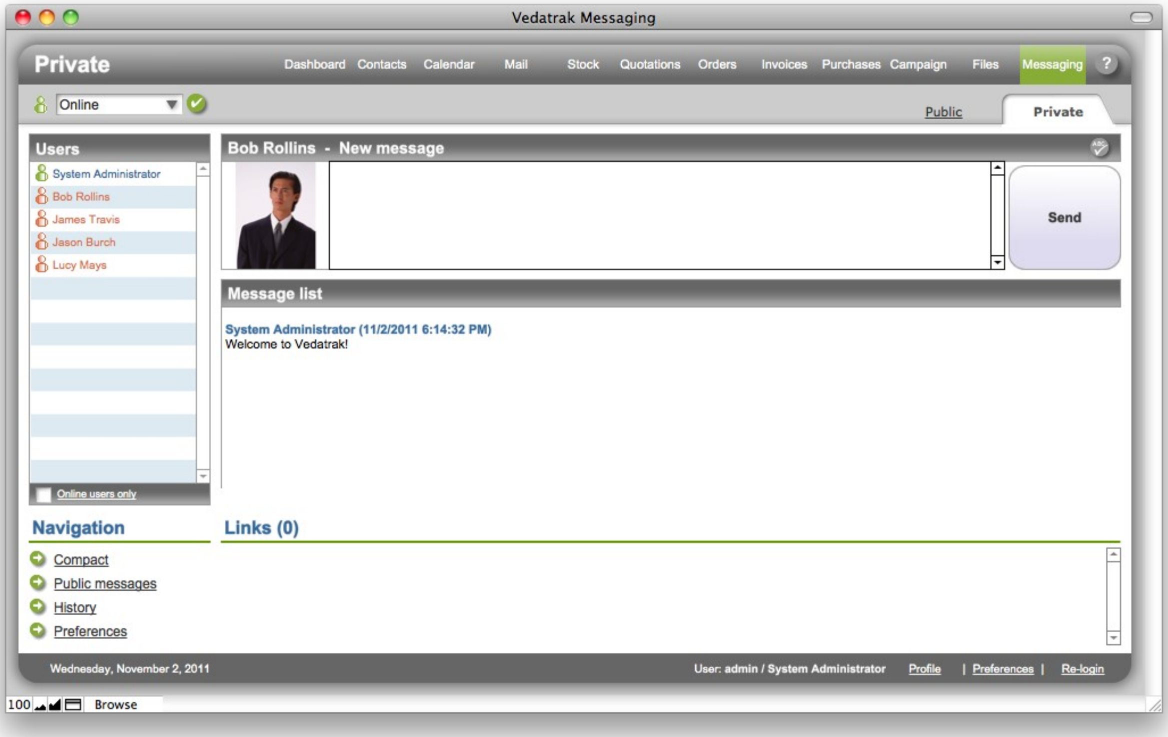
- To broadcast a message, write it in the **New Message** field then click **Send**.
- Click **Spell Check**  to perform a spell check before the message is sent.
- To change your own status, select the **Status** drop down list and click **Apply**.

- 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 different **Messaging** modes use the **Navigation** area.
- To open received database links click **Edit/View**  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 database links.



- To send a private message to a selected user, enter text in the **New Message** field then click **Send**.
- Click **Spell Check**  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 Individual Bookmarks 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 Dashboard's Quick Find. Then click the **Find** button.*

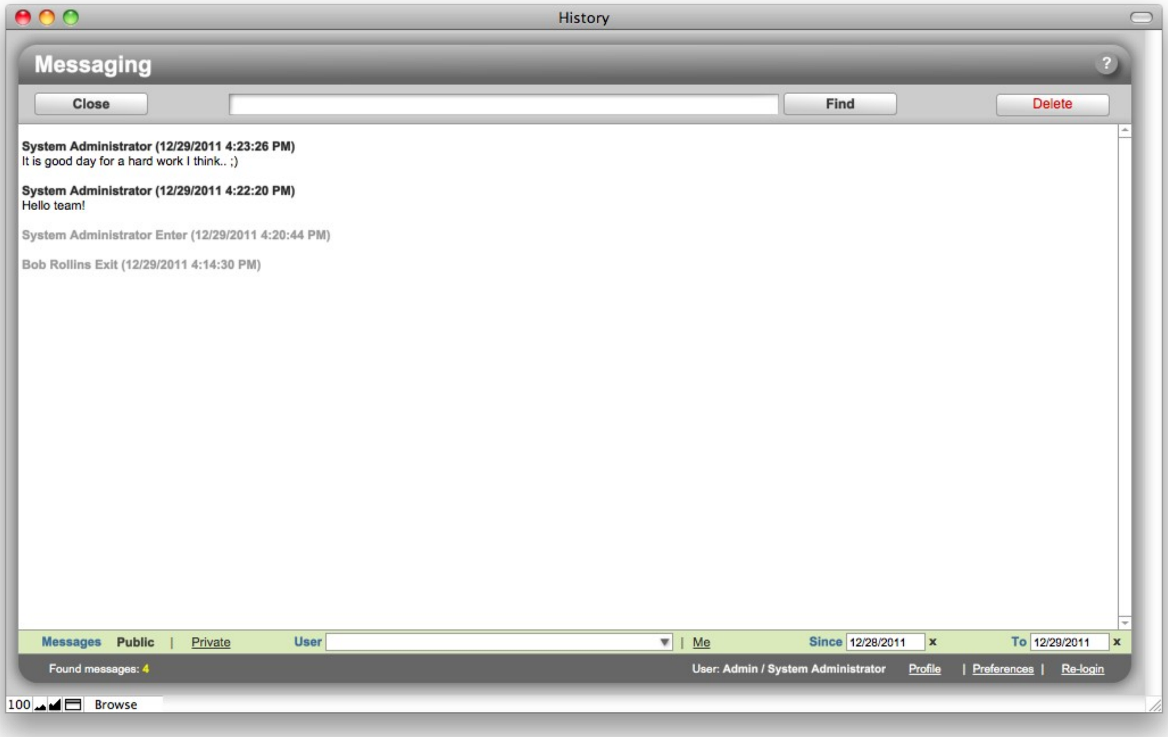
Reading Messages

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

- Use Messaging Preferences 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.

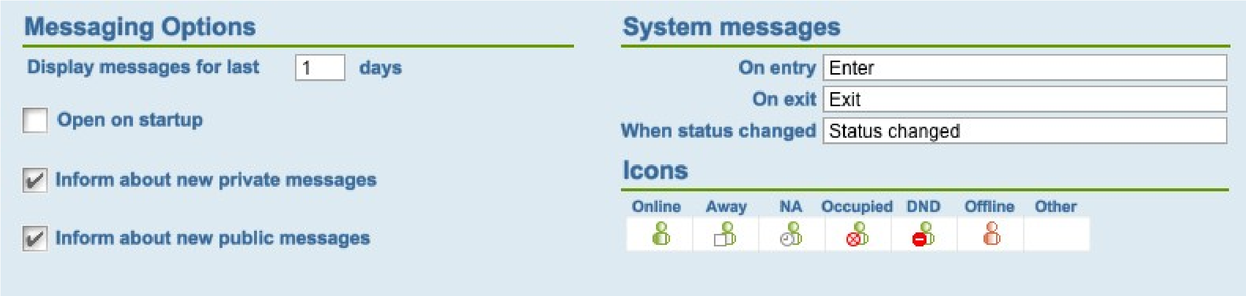


- Use the **Find** button to perform a find in **History**.
- Messages in **History** can be organized by type (***Public*** or ***Private***), the **Sent** and **Received** date, and by the **User** (including quick accessible values: ***Me*** or ***All*** the users).
- Click **Close** 

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 User Info.



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.

Icons

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