CONTROL USERS REFERENCE MANUAL

Revised September 2007

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TABLE OF CONTENTS

1 : USING THIS GUIDE

PURPOSE OF THIS MANUAL

This manual was created with the hope that it can answer the questions you will have as you become accustomed to your new software.

HOW TO USE THIS MANUAL

Throughout the manual, you will see items that are designed to bring your attention to Notes, Warning and Go-To's. The image in Go-To's will be an icon relevant to the location or type of "link" represented.

NOTES

Notes are items that we want you to be aware of.

These functions will help you become more efficient with the software.

Example: *The options that are available from the ACTION toolbar will change depending on the screen selected.*

Figure 1-1 An example of a NOTE.

WARNINGS

Warnings are items we want you to pay attention to.

As with any software program, Cyrious is constantly evolving to improve performance and productivity. These are items you should look out for.

Example: ***You should never leave your system unattended for any extended period as you may prevent another user gaining access to the files you are using***

Figure 1-2 An example of a WARNING.

GO-TO'S

As Cyrious is such a complex program, we have included "links" in every section. These links will tell you how to get to the screens you need access to, click-by-click.

Example: **Main Menu | Setup | System Setup**

Figure 1-3 An example of a GO-TO.

TECHNICAL SUPPORT

If we have not addressed your question in this manual, please contact our Technical Support team.

SUPPORT

Toll-Free (US): (888) 552-9823
International: (225) 752-2866
Fax: (225) 612-6308
controlsupport@cyrious.com

SALES

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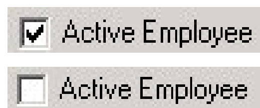
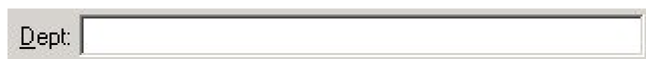
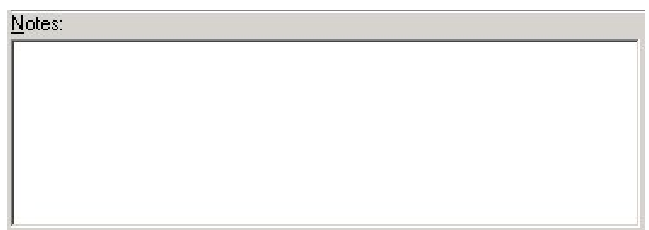
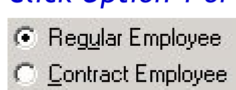
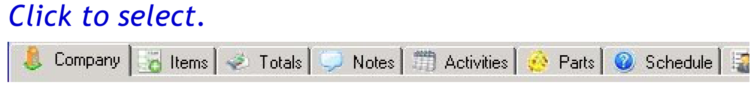
2 : GETTING STARTED

WORKING KNOWLEDGE OF MICROSOFT WINDOWS®

Cyrious Control currently operates on Windows 2000, Windows XP, and Windows 2003 (Me). Since the three operating systems are so similar, it does not matter which version of Windows you choose to utilize, as long as you are comfortable using one of them.

You should be familiar with the following items:

Referred to in this manual as …	The item looks like this …
Checkbox - with label On/Off selection.	 *Select or* *Deselect*
Edit Box – with label Used for limited-length text fields.	*Click in the box to enter text.* 
Memo Box – with label Used for unlimited-length and multi-line text fields. Click inside the box to enter text.	*Click in the box to enter text.* 
Selection Button	*Click to select.*  
Radio Button – with labels Used for either/or selections.	*Click Option 1 or Option 2. (option 1 selected)* 
Numeric Spin-Edit Used for number/quantity.	*Click in the box to enter the number; or click on the arrow to increase or decrease the quantity.* 
Page Control/Tab Sheet	*Click to select.* 

Referred to in this manual as …	The item looks like this …
Combo / Dropdown Box Used for selection lists.	*Click on down-arrow to reveal the options available.* 
Menu Bar	*Click to select.* 
Toolbar	*Click to select.* 
Minimize, Maximize, Restore and Close Buttons Located in the top-right corner of the Cyrious main window.	*Click to select.* 
Minimize, Maximize, Restore and Close Menu Has corresponding options to the buttons. Located in the top-right corner of the Cyrious main window.	*Select option.* 

Figure 2-1 Typical Windows Elements

SHORTCUT KEYS

In addition to menus and toolbars, some of the commands have shortcut keys for quicker, easier access. Most use the CONTROL (Ctrl) Key plus another key. Some use the SHIFT plus CTRL plus another key. Try some of the options below for yourself and perhaps, keep a copy of this page nearby for quick reference.

ICON	MENU COMMAND	SHORTCUT
	LOGOUT	Ctrl+L
	LOCK SCREEN	Ctrl+K
	NEW ORDER	Ctrl+O
	NEW ESTIMATE	Ctrl+Q
	NEW COMPANY	Ctrl+U
	ACTIVITY MANAGER	Ctrl+G
	CLOSE	Ctrl+F4
	EDIT	Ctrl+E
	SAVE	Ctrl+S
	BROWSE WEB	Ctrl+F
	ABOUT CONTROL	Ctrl+I

LOGIN TO CYRIOUS

First you must login to Cyrious Control. Once installed, the icon should appear in your start menu. It may appear in the list (as shown below) or you may need to select the ALL PROGRAMS option and then select from a list.

Figure 2-2 Example: Start Menu- Cyrious Control

Figure 2-3 Example: All Programs - Cyrious Control

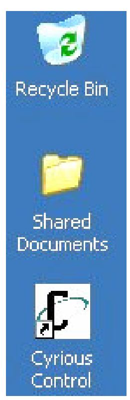


Figure 2-4 Example: Cyrious Control Desktop Icon

Each user's computer will probably be set up differently – some do not have many icons on the desktop and others may only use that method. There is no set rule for accessing the Cyrious Control program.

LOGIN TO CYRIOUS

Once you have started to Control, this Login Screen will appear, prompting you for a Login Name and Password.

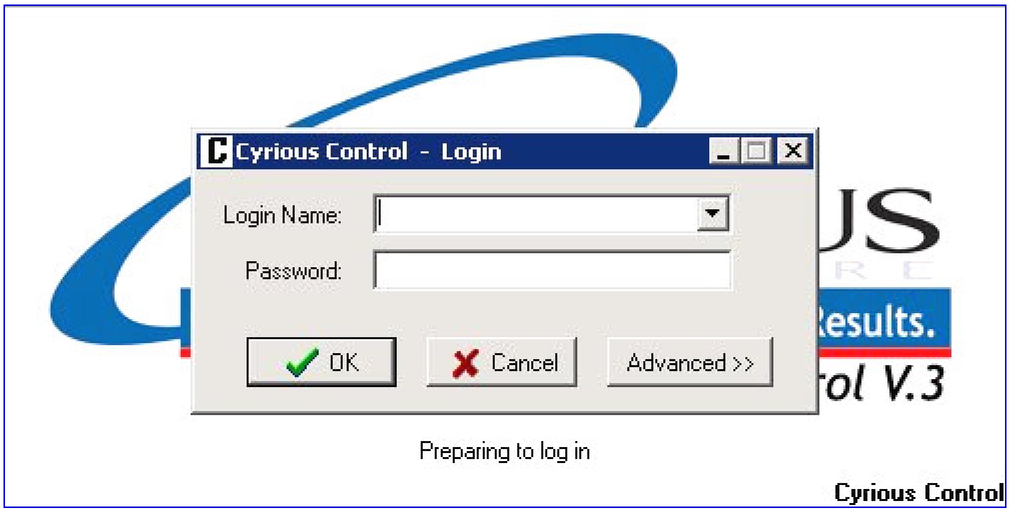


Figure 2-5 Cyrious Control Start Up Screen with Login Dialog Box

Figure 2-6 Login Name Drop-Down List

Figure 2-7 Login Name Selected with Password

LOCK SCREEN

When you are leaving your computer unattended for any length of time, this option should be used to protect your information from unauthorized viewing or use.

Figure 2-8 File Menu – Lock Screen (Ctrl+K)

When selected, a pop-up window appears. The user will have to enter their password when they get back to the system.

Figure 2-9 Manual Locked Screen Mode

If you leave your system unattended and do not Lock the Screen, you may find that the system has automatically locked it for you.

The pop-up window is slightly different as it prompts you to either …

- UNLOCK
- LOGOUT
- LOGIN OTHER

Figure 2-10 Login Options

Figure 2-11 Automatic Locked Screen Mode

You should never leave your system unattended for any extended period without using this function.

UNLOCK

When you select the UnLock button, the logon screen will appear, prompting you for a password.

Figure 2-12 Login Dialog Box - Prompting for a Password

LOGOUT

If you want to Logout completely, click on the Logout selection button and a prompt will appear.

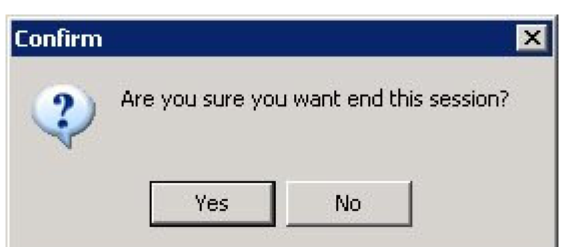


Figure 2-13 Logout Confirmation Dialog Box

CHANGE PASSWORD

This option will bring up a pop up window with a password change dialog box.

An original password is provided by the System Administrator and they may have the option for each user to change it the first time they use the system.

Figure 2-14 Change Password Dialog Box

Passwords can always be changed by the System Administrator to provide added security for the Control system.

3 : NAVIGATING IN CYRIOUS

HOME PAGE

The Home page is accessed by clicking on the **Home** button in the top left of the screen.

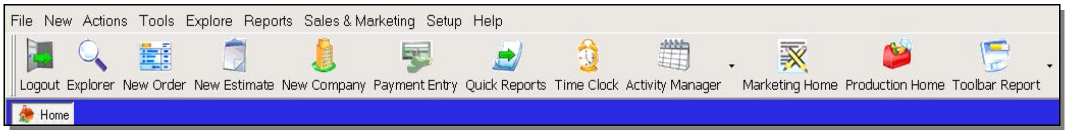


Figure 3-1 The Menu Bar and Home Button

The home screen button will appear at the top of the screen, below the menu/toolbar, when you are working in **Explorer** or any of the other areas in Cyrious.

The **Quick Products** options appear to the left of the Home.

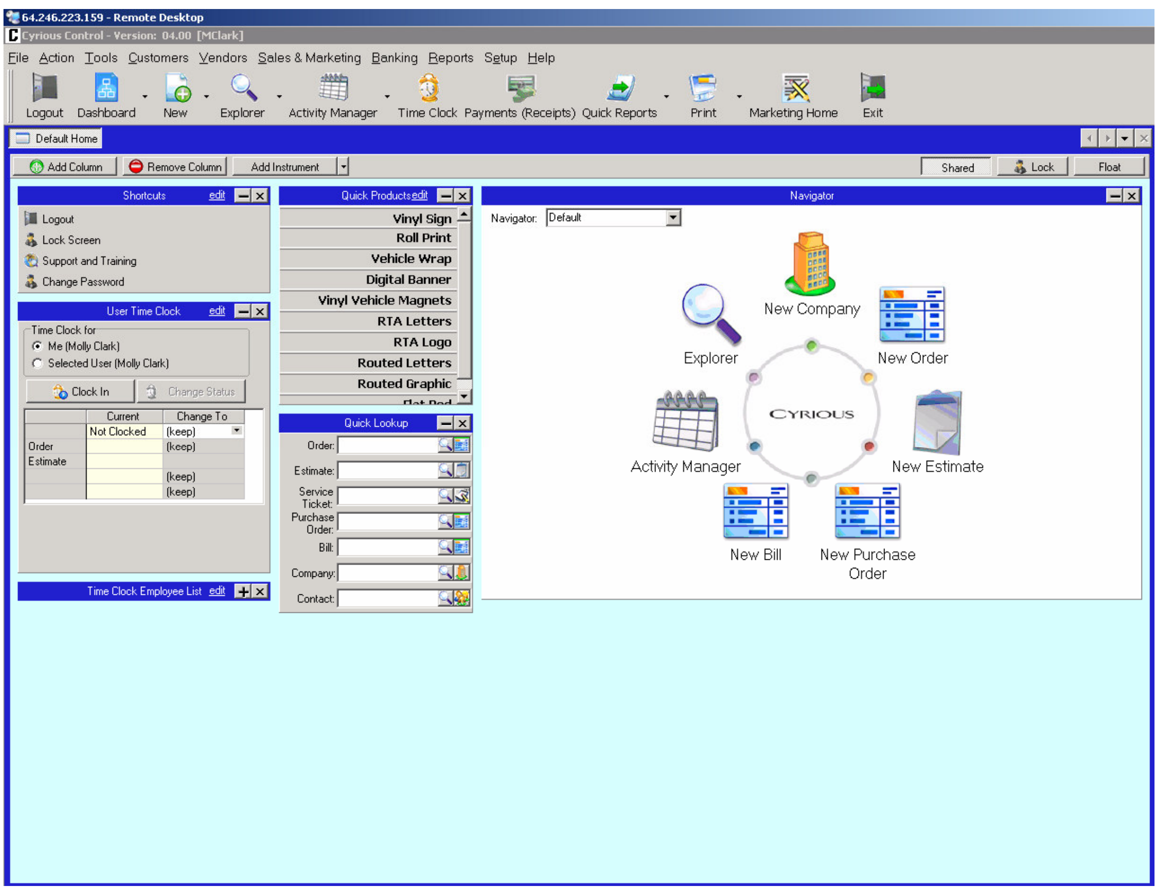
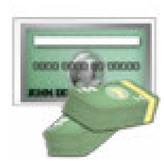
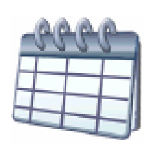


Figure 3-2 The Cyrious Control Home Page

Figure 3-3 Quick Products & Quick Lookup Sidebar

The **Home** screen contains shortcuts to these frequently used functions:

 **Explorer** Chapter 5	 **New Company** Chapter 6	 **New Estimate** Chapter 7
There is nothing wrong with change, if it is in the right direction. Winston Churchill Cyrious.net Cyrious Software Private Web Next Tip>> **Today's Tip** Example		 **Quick Products**
 **New Order** Chapter 7	 **Payment Entry** Chapter 4	 Activity Manager Chapter 8

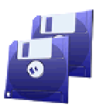
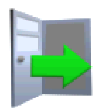
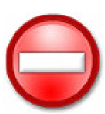
ACTION TOOLBAR OVERVIEW

The Action toolbar appears on the right of every screen. This toolbar allows the User to make certain choices, such as save, print or edit, with respect to the information on the data entry screen. Any active portion of the toolbar appears in color. Any inactive portion appears gray.

The options available from the Action toolbar change in EVERY screen you access in Control. However, depending on the screen you are in, these buttons will have drop-down menus of specifically tailored options.

You will learn about these advanced actions later in the manual.

COMMON ACTION TOOLBAR BUTTONS

Button	Function	Button	Function
 SAVE	Saves all entered information.	 CLOSE	Closes an unedited screen.
 CANCEL	Disregards any changes and additions made to a record.	 EDIT	Enters a mode that allows previously saved information to be changed.
 CLONE	Duplicates a pre-existing order, estimate, or product to a new record.	 STATUS	Opens a sub menu to view or change the status of an order.
 VOID	Cancels an estimate or product from the database.	 PRINT	Prints the selected item such as an order, estimate or company details.
 NEW	Creates a new record in a new screen.	 EXPORT	Export information for access in another program format, such as Text, XML and XLS.

MAIN MENU OVERVIEW

FILE MENU

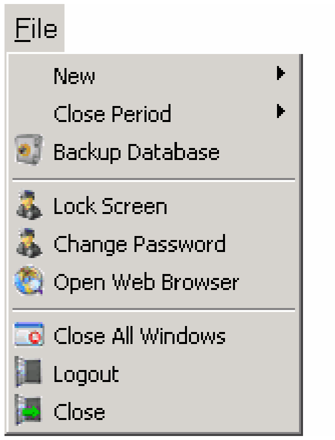


Figure 3-4 File Menu Options

BACKUP DATABASE

This will bring up a pop up window verifying that you want to continue with the procedure.

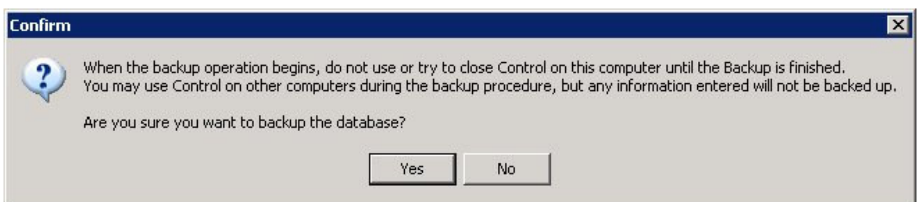


Figure 3-5 Backup Database Prompt

This procedure takes up quite a bit of time and will disable that particular computer from using Control until the procedure is complete.

CLOSE PERIOD SUB MENU

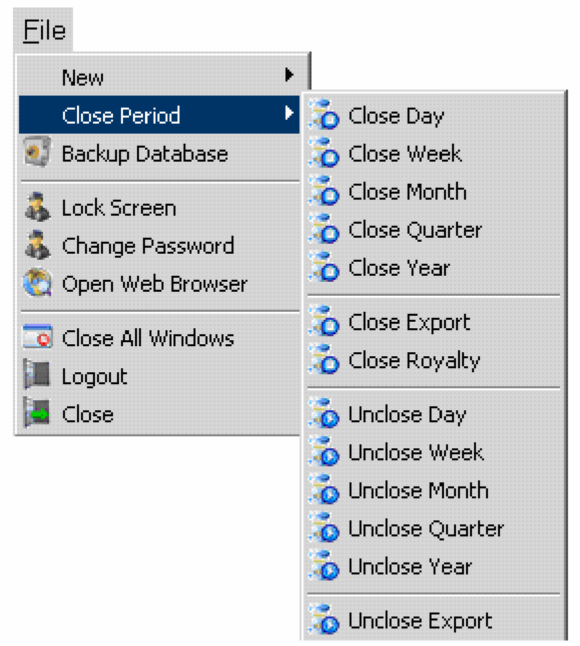


Figure 3-6 Close Period Sub Menu

Close Day — Finalizes the day's financial records. Any other payments entered will show on the next business day's records.
Opens a prompt to print reports.

Close Week — Finalizes the week's financial records. Any other payments entered will show on the next business week's records.
Opens a prompt to print reports.

Close Month — Finalizes the month's financial records. Any other payments entered will show on the next business month's records.
Opens a prompt to print reports.

Close Quarter — Finalizes the quarter's financial records. Any other payments entered will show on the next fiscal quarter's records.
Opens a prompt to print reports.

Close Year — Finalizes the year's financial records. Any other payments entered will show on the next fiscal year's records.
Opens a prompt to print reports.

Close Export Period — Finalizes the export period's financial records. Any other payments entered will show on the next export period's records.
Opens a prompt to print reports.

Close Royalty Period — Finalizes the royalty period's financial records. Any other payments entered will show on the next royalty period's records.
Opens a prompt to print reports.

You can configure Cyrious to send your information to your bank when you close.

Unclose Day — Reopens the current day's financial records.
Any other payments entered will show on the current business day's records.

Unclose Week — Reopens the current week's financial records.
Any other payments entered will show on the current business week's records.

Unclose Month Reopens the current month's financial records. Any other payments entered will show on the current fiscal month's records.

Unclose Quarter Reopens the current quarter's financial records. Any other payments entered will show on the current fiscal quarter's records.

Unclose Year Reopens the current year's financial records. Any other payments entered will show on the current fiscal year's records.

Unclose Export Reopens the current export period records. Any other payments entered will show on the current export period's records.

Settle Credit Cards Finalizes the day's credit card processing records.

NEW MENU

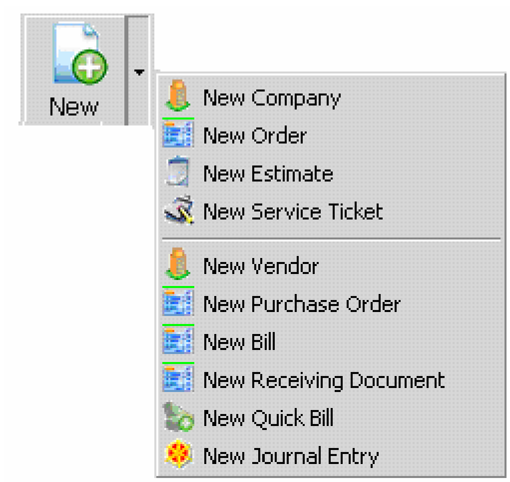


Figure 3-7 New Menu Options

New Order Opens a screen to create a new order.

New Estimate Opens a screen to create a new estimate.

	New Company	Opens a screen to create a new company.

ACTIONS MENU

The content of this menu will vary depending on the screen you are working in. You will learn about the various actions that will appear throughout this manual.

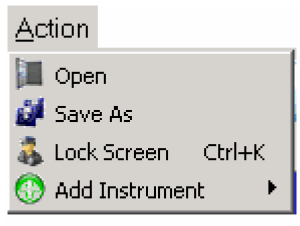


Figure 3-8 Explorer Actions Menu : Options- Example 1

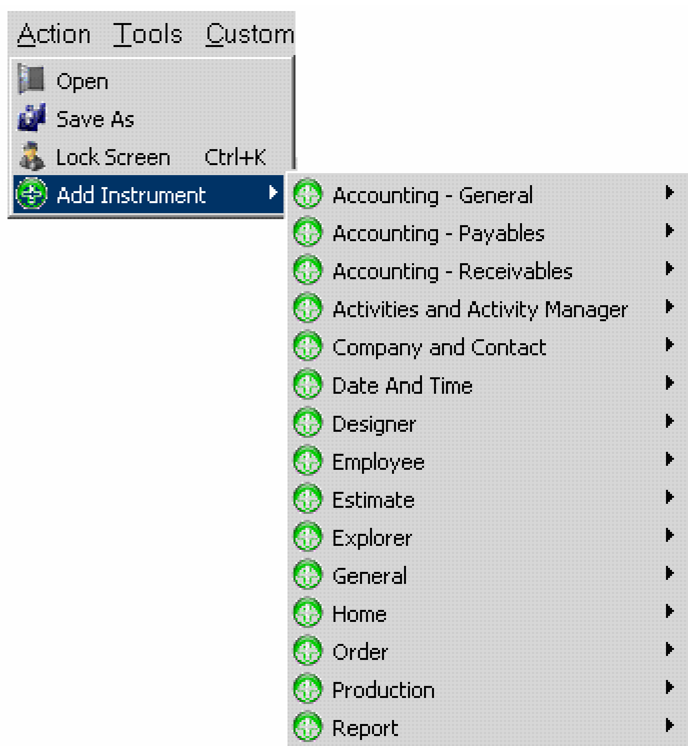


Figure 3-9 Explorer Actions Menu : Options- Example 2

TOOLS MENU

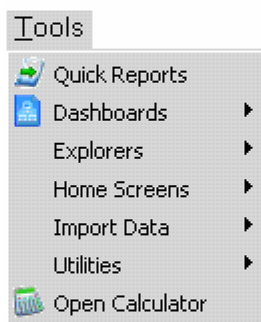


Figure 3-10 Tools Menu Options

Time Clock Adjustment

Opens the time clock adjustment screen.

See Chapter 3 : Employees

Create History

Opens a pop up window with options for auto archiving records. Archiving moves records to your history. You can access them by performing one of two History searches in Explorer.

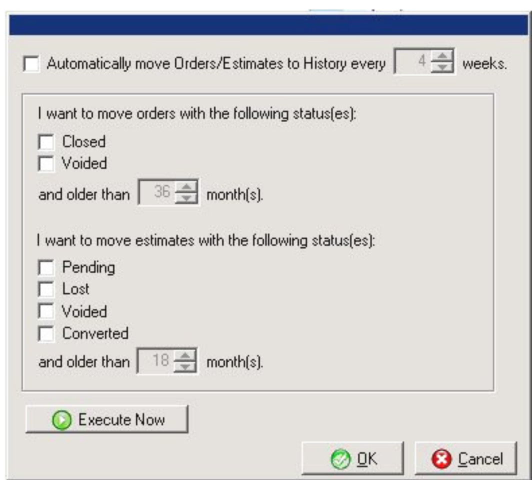


Figure 3-11 Create History Dialog Box

Adjust Part Inventory

Opens a grid displaying all parts available and function buttons to change them.

Adjust Part Cost

Opens a grid displaying all parts available and functions to change their prices.

	**Apply Finance Charges**	Opens a screen where you can assess all financed orders and adjust rates.

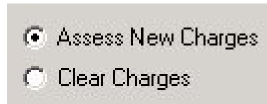


Figure 3-12 Apply Finance Charges Options

	**Verify Formulas**	Opens an evaluation tool that will check all formulas you have set up in your system. Click the button on the right to save this log.
	**Report Checker**	Lists all reports with broken links or invalid system reports.
	**Import Products**	Opens a screen to import products into Control.
	**Generic Importer**	Opens a screen to import data and templates into Control.
	**Browse Web**	Opens a web browser window in Control.

VERIFY FORMULAS may take a long time to complete, depending on how many formulas you have set up.

You may choose to wait until the end of your business day to use this option as you will be unable to use Control until this inventory is complete.

Figure 3-13 Cyrious Web Browser

EXPLORE MENU

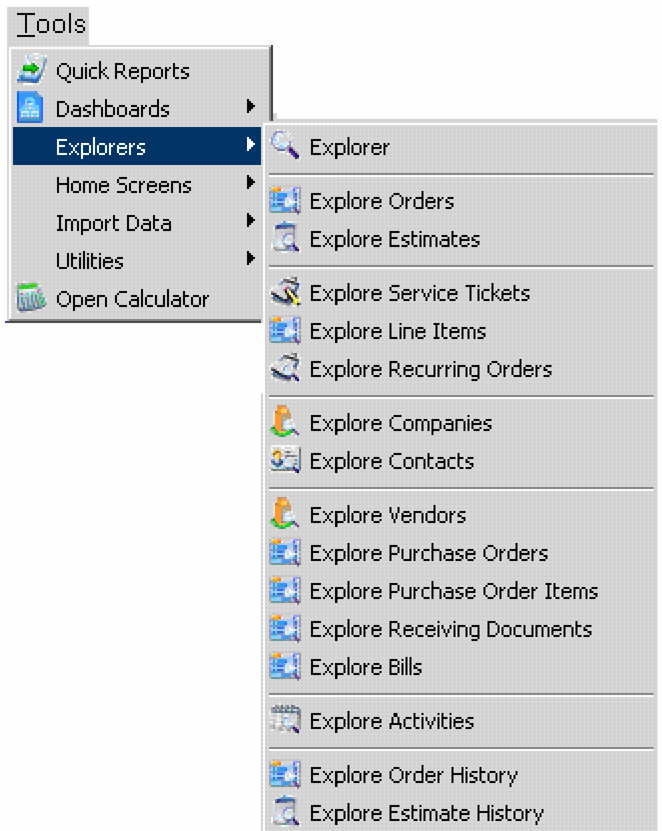


Figure 3-14 Explore Menu Options

Explorer is Cyrious Software's powerful search engine. With it, you can locate various types of records, such as orders, estimates, service tickets, and contacts.
See *Chapter 9 : Explorer* *for an extensive review of how to best use this valuable tool.*

REPORTS MENU

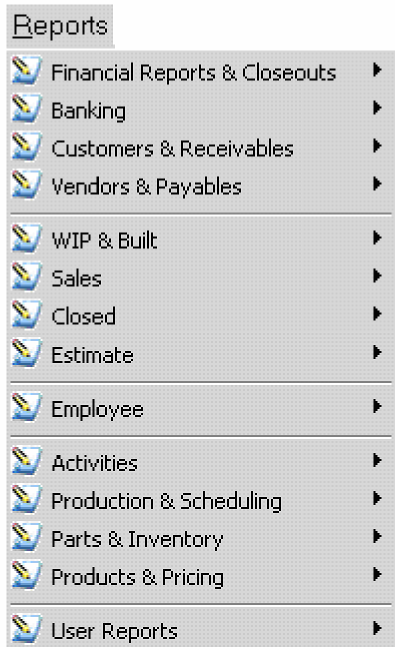


Figure 3-15 Reports Menu

The Reports menu contains sub-menus for each of the options listed. These will be covered in detail in Chapter 15 : Reporting.

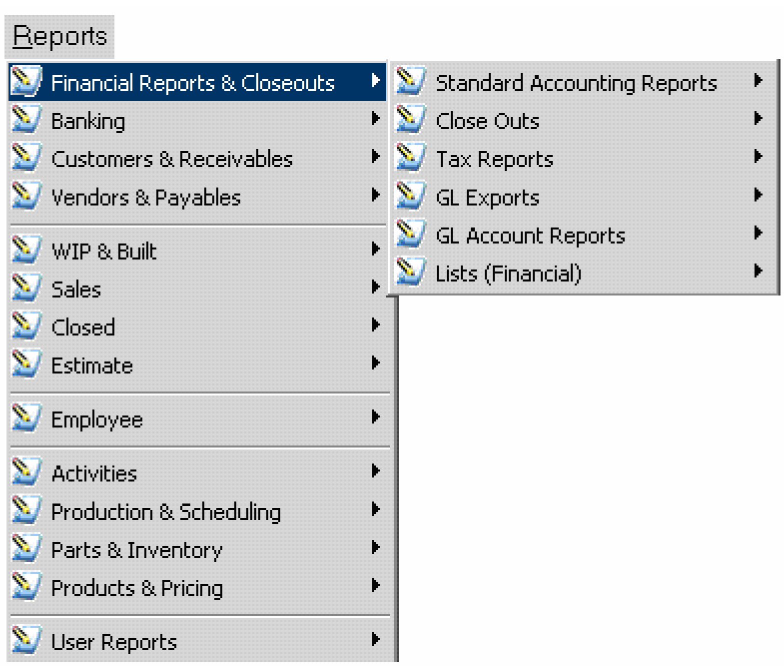


Figure 3-16 Accounting Reports Sub-Menu

Many of the sub-menu options also have a sub-menu with additional options.

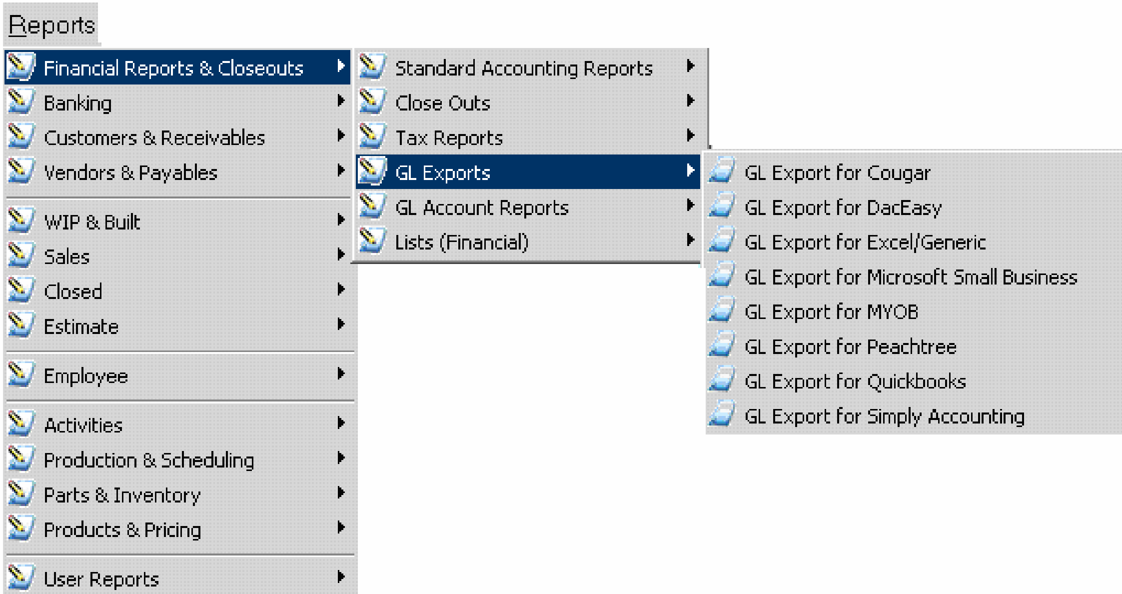


Figure 3-17 GL Export Sub-Menu

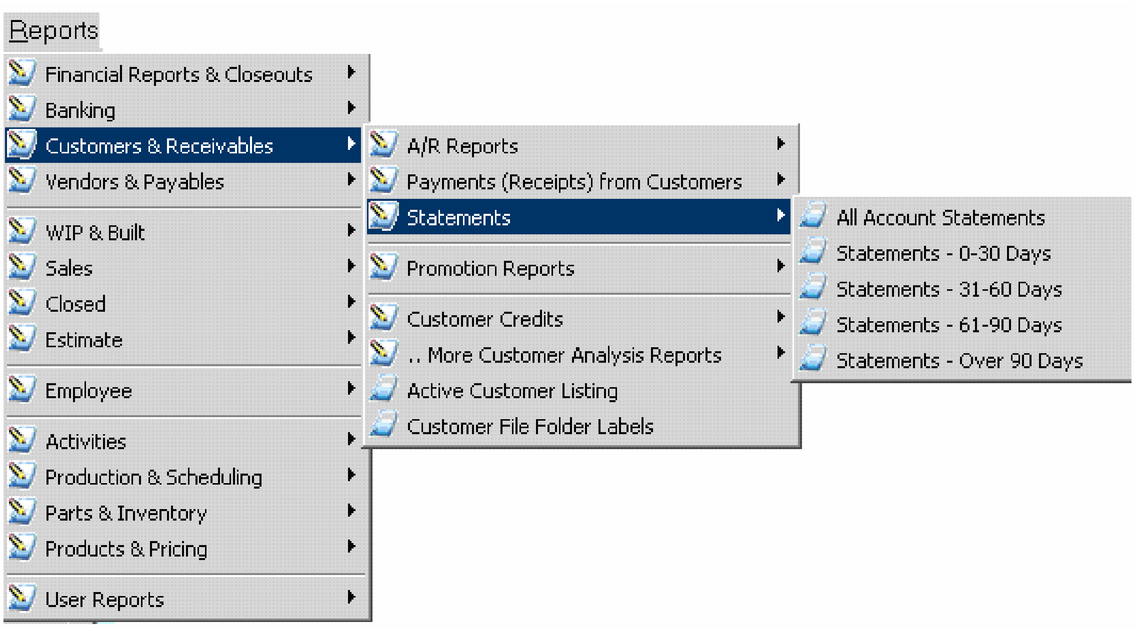


Figure 3-18 Statements Sub-Menu

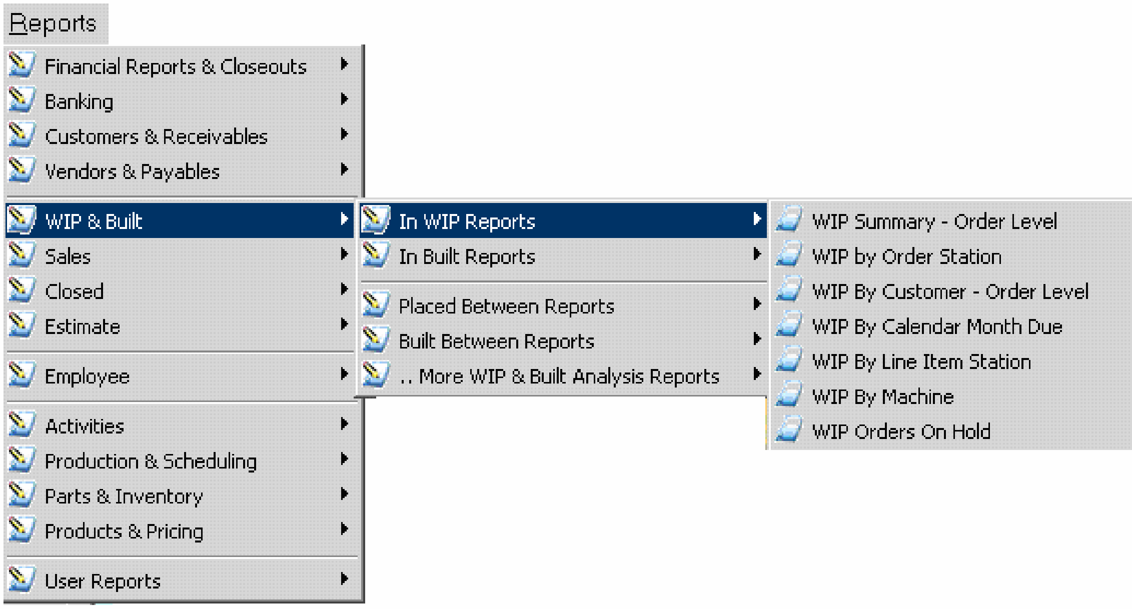


Figure 3-19 Order Status Reports - WIP Reports Sub-Menu

SALES & MARKETING MENU

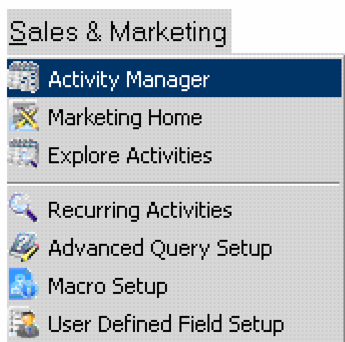


Figure 3-20 Sales & Marketing Menu

The Sales and Marketing menu options will be covered in detail in Chapter 14 : Marketing. Selecting either the Marketing Home option or the Marketing Home button on the toolbar will take you to the Marketing home screen.

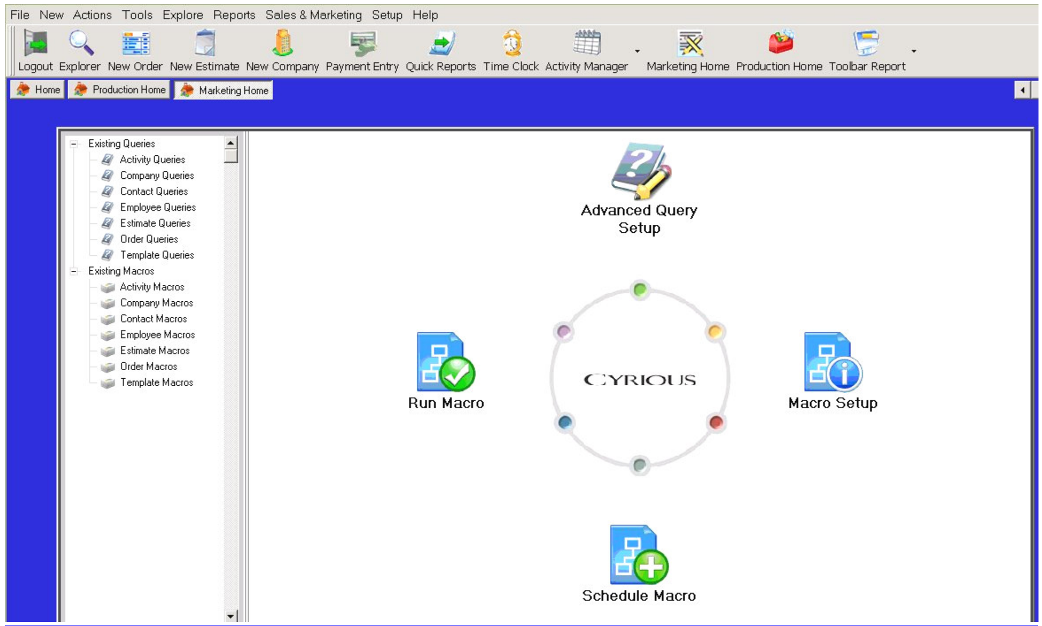


Figure 3-21 Marketing Home Screen

SETUP MENU

Figure 3-22 Setup Menu

User Options

User Options allows for customization of each user

System Setup

Machine Setup

Employee Setup

Security Setup

Pricing Setup

Reporting Setup

These options are covered in the **Cyrious Set Up Guide** and would generally be controlled by your System Administrator.

4 : USER OPTIONS

Figure 4-1 Setup Menu

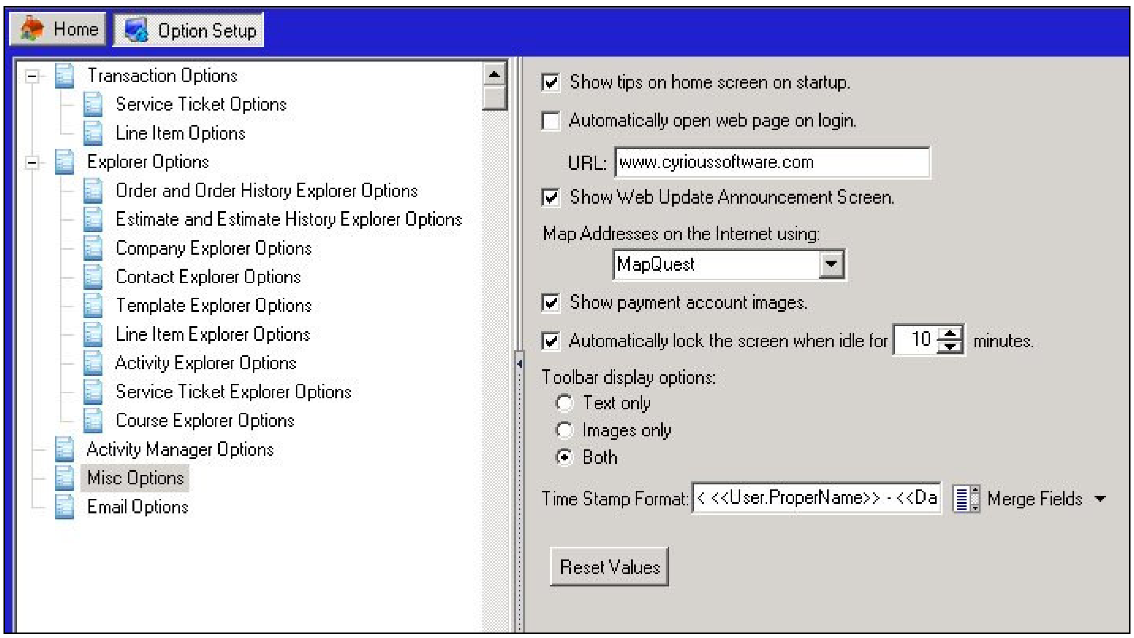


Figure 4-2 User Options: Options Setup Screen – Miscellaneous Options Selected

SEE THE CYRIOUS SETUP GUIDE

These options are covered in the **Cyrious Set Up Guide** and would generally be controlled by your System Administrator.

5 : SYSTEM SETUP

Figure 5-1 Setup Menu Options

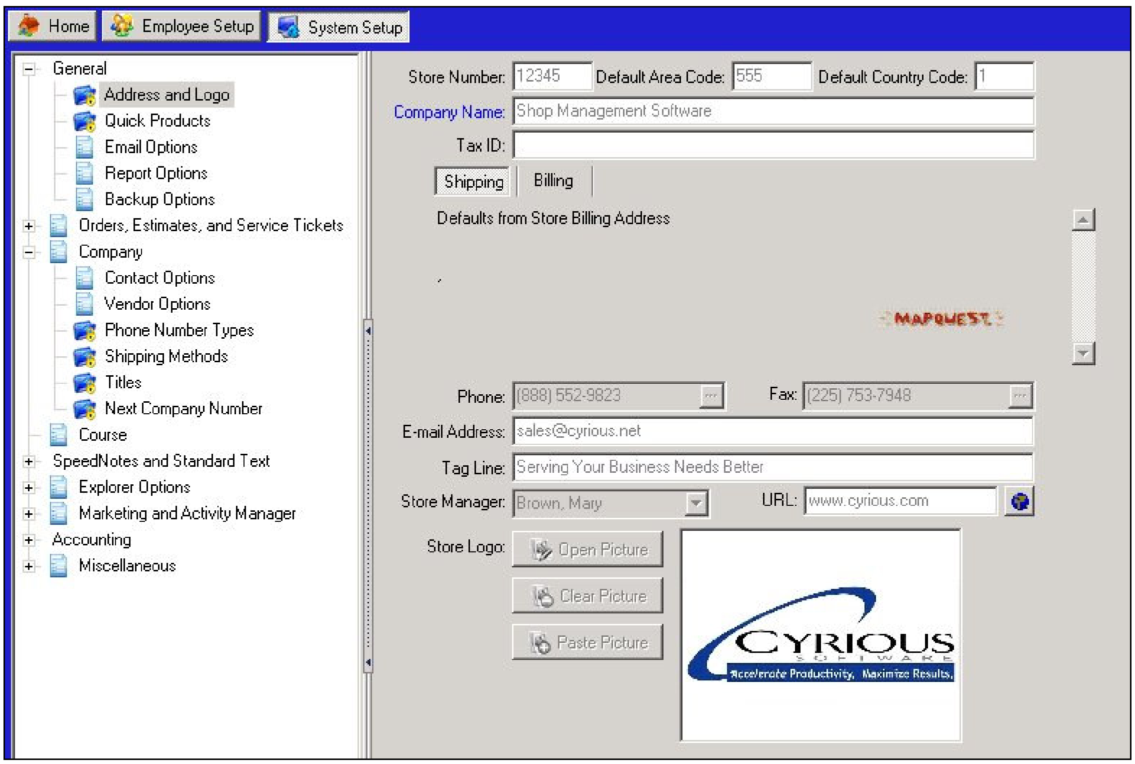


Figure 5-2 System Setup Screen- Address & Logo Options Selected.

SEE THE CYRIOUS SETUP GUIDE

These options are covered in the **Cyrious Set Up Guide** and would generally be controlled by your System Administrator.

6 : MACHINE SETUP

Figure 6-1 Setup Menu Options

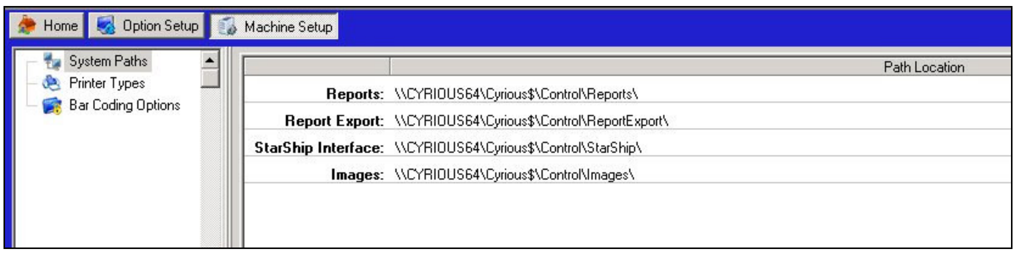


Figure 6-2 Machine Setup Options

SEE THE CYRIOUS SETUP GUIDE

These options are covered in the **Cyrious Set Up Guide** and would generally be controlled by your System Administrator.

7 : EMPLOYEES

CONCEPT

Every Cyrious Control action, order, report, transaction, or activity requires an employee login.

For employees to gain access to Cyrious, you must first enter their identifiable information in the Employee Setup. Detailed records of all employees may be saved in the **Employee Setup** section.

This general employee information identifies actions and secures personal information that is unavailable for Users who do not have access granted.

Main Menu | Setup | Employee Setup

Figure 7-1 Setup Menu Options

EMPLOYEES & EMPLOYEE GROUPS

To the left of the Employee Setup screen, there is a list of all employees and groups. The Company is the head of this hierarchy. All sub groups, employees, and divisions are beneath the parent company.

A sub group is a group of employees that belong to a specific function in the company such as Administration or Production. Employees are beneath a sub group of the company itself. Alternately, you may set up a collection of employees or sub groups underneath a division, such as a regional collection of employees, or a separate company contained under a parent company.

Certain employees and groups are set up as defaults.
You cannot delete these, even if not in use.

The defaults are Company, House Account, and System Administrator.

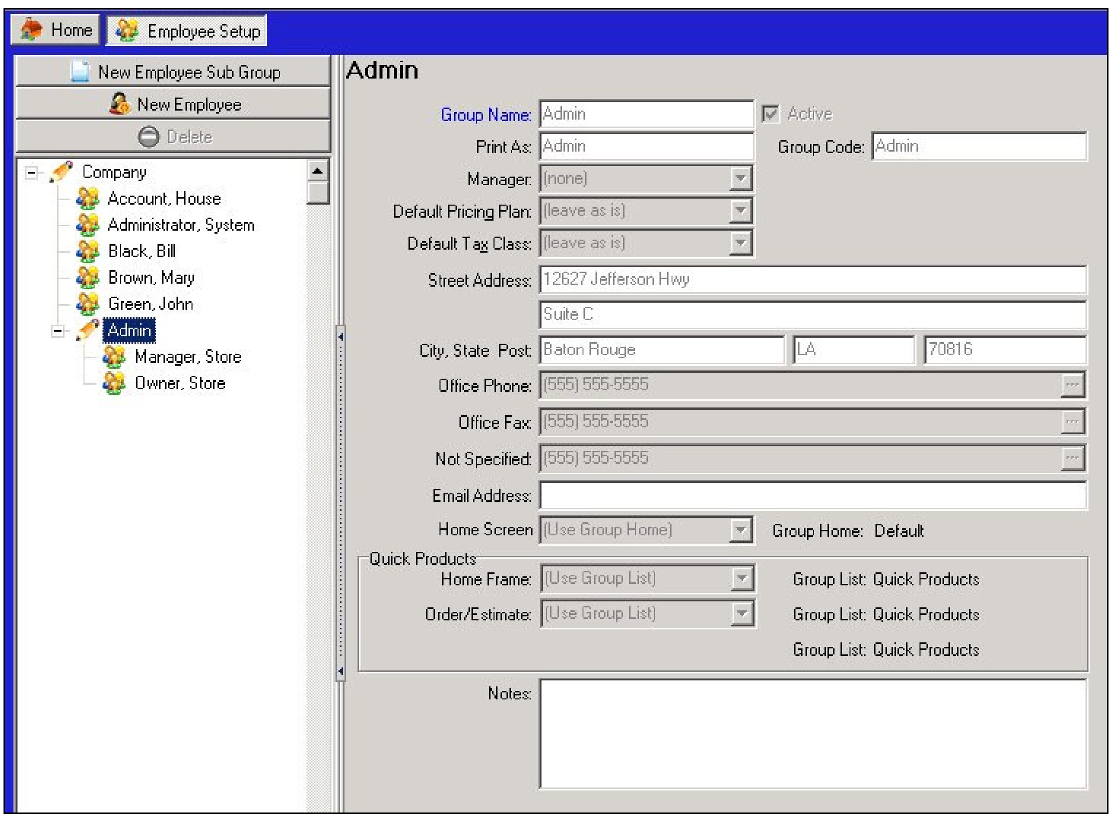


Figure 7-2 Admin Group Setup Screen

EMPLOYEE SUB GROUP SCREEN

Main Menu | Setup | Employee Setup

Click an employee sub group at far left.

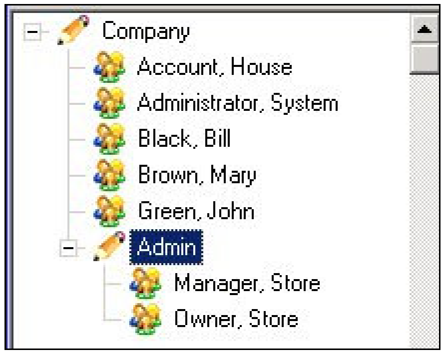


Figure 7-3 Employee Sub Group Admin Selected

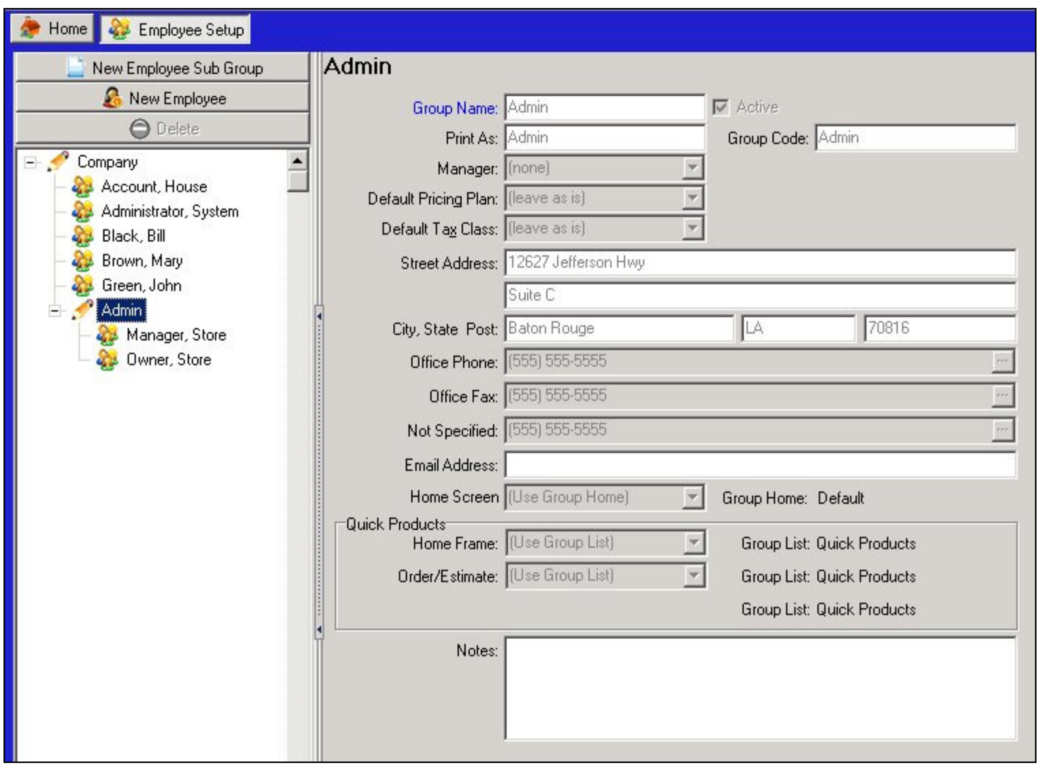


Figure 7-4 Employee Setup Options: Admin Sub Group Selected.

Group Name	Enter the name of the group. This option must be completed – a warning will appear when you try to save the information.
Active *(Checkbox)*	If this box is checked, the group is active.
Print As	Enter the group name you want printed on documents generated by Control.
Group Code	Enter in your coding for marketing and reports.
Manager	Enter in the name of the head of this group.
Default Pricing Plan	Select the default pricing for this group.
Default Tax Class	Select the default tax class for this group. You can select from city, county and state tax classes.

There are numerous options throughout Control to adjust the tax class used in place of the default.

Street Address	Enter in the group's address. For example, your Sales group may be located in Orlando, whereas your Administrative group is in Miami.

SPECIFYING A TELEPHONE TYPE

The following information applies to many information screens in Control.

Options List To the left of each telephone field is an arrow. Selecting this arrow reveals a list of telephone types from which to choose.

Figure 7-5 Drop-down list of Contact Number Types

Office Phone Enter the number of the office phone for the selected street address. This may be different from the Company phone number(s).

Click the button to the right of the entry field to enter a more complex telephone number, such as an international calling code.

Press **Enter** to apply the new number.

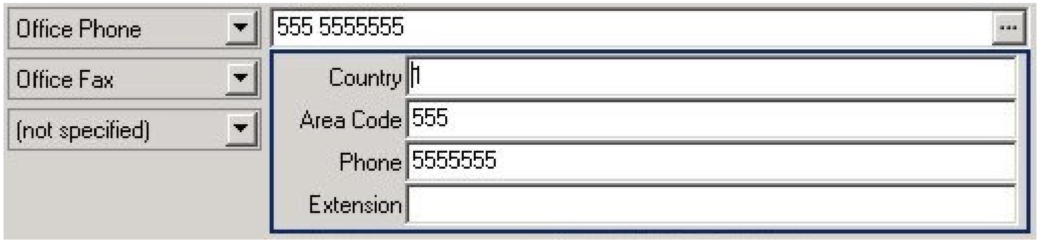


Figure 7-6 Click on the button to enter the contact details.

Office Fax Enter the number of the office fax for the selected street address. This may be different from the Company phone number(s).

Not Specified This may be a second office phone number or it could be a cell phone. You must select the option from the drop-down list once you have entered a number.

Email Address Enter the complete email address for that sub group or individual.

Figure 7-7 Example of a complete email address

Home Screen Select the option from the drop-down list.

Figure 7-8 Drop-down list of Home Screen Options

Quick Products Designate the Quick Products you want members of this group to see when they initially log in to Control. For example, your Sales team might need quick access to new orders, but Repairs might need access to service tickets.

Figure 7-9 Quick Products Options for Home Frame and Order/Estimate.

Notes Enter any additional information about the sub group as required. These notes are visible only to those authorized to access the Employee Setup.

SPECIAL ACTION TOOLBAR FUNCTIONS- DON'T KNOW WHAT EACH FUNCTION DOES

The options available in the Action Menu will change depending on the screen you are working in. See example below.

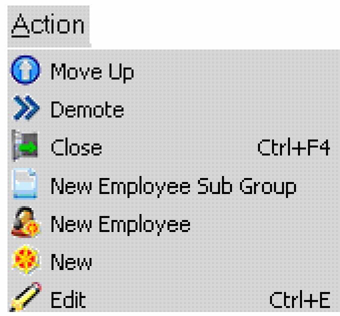


Figure 7-10 Employee Sub Group Setup Actions Menu Options

Close	Closes an unedited screen.
New Employee Sub Group	Opens a dialog window with prompts to create a new employee sub group. Employee sub groups branch out from the main company group displayed at top.
New Employee	Opens a dialog window with prompts to create a new employee. Highlight an employee sub group and then click this button. The employee will be under that sub group. Nothing is highlighted when you click this button, the employee will be under the parent company.
New	Opens a screen to create a new record.
Edit	Enters a mode that allows previously saved information to be changed.
Clone	Creates a duplicate of the selected record or option.

Example: There are less options available for the Options Setup Screen.

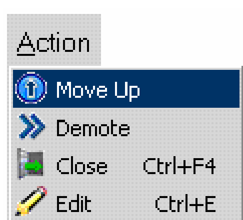


Figure 7-11 Action Menu Options for the Options Setup Screen

RIGHT CLICK OPTIONS

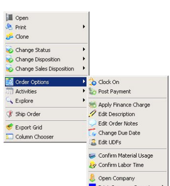
For quick access to certain functions when editing a record, simply place the cursor over the options and then click on the right mouse button.

A pop-up menu will appear with all of the options available for that selection.

Figure 7-12 Employee Group Code Right Click Options

Figure 7-13 Employee – Personal Information Tab Right Click Options

This allows access to options that do not appear on the current screen.



The best way to learn what options are available on the Right Click menu is to open a few screens and look at some of the menus.

EMPLOYEE SUB SCREEN

Main Menu | Setup | Employee Setup

Click on an employee name at immediate left.

NEW EMPLOYEE SUB GROUP

Opens a dialog window with prompts to create a new employee sub group. Employee sub groups branch out from the main company group displayed at top.

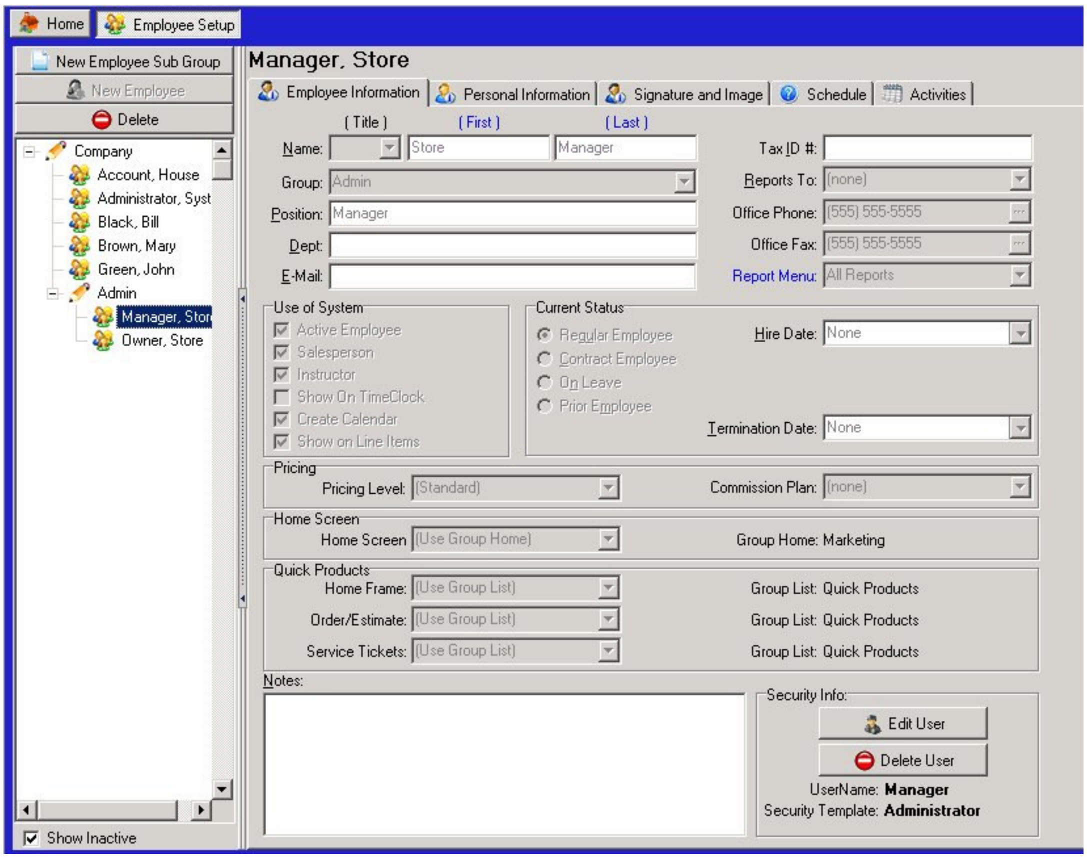


Figure 7-14 Employee Setup Screen

New Employee Opens a dialog window with prompts to create a new employee. Highlight an employee sub group and then click this button. The employee will be listed under that sub group. Nothing is highlighted when you click this button, the employee will be listed under the company.

Delete	Removes an estimate or product from the database.
Show Inactive	If this box is checked, all employees and sub groups will show.
Group Name	The name of the group.
Active	If this box is checked, the group is active.
Print As	Enter the group name you want printed on documents generated by Control.
Group Code	Enter in your coding for marketing and reports.
Manager	Enter in the name of the head of this group.
Default Pricing Plan	Select the default pricing for this group.
Default Tax Class	Select the default tax class for this group. You can select from city, county and state tax classes.
Division Name	Use divisions for special distinctions such as regional groupings, or place separate companies under a single parent company. **This field is mandatory.** If not changed, it will have the same name as the company.
Address	Enter in the group's address. For example, your Sales group may be located in Orlando, whereas your Administrative group is in Miami.
Quick Products	Designate the Quick Products you want members of this group to see when they initially log in to Control. For example, Salespersons might need quick access to new orders, but Repairs might need access to service tickets.
Notes	Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

SPECIAL ACTION TOOLBAR FUNCTIONS

Edit Enters a mode that allows previously saved information to be changed.

Save Saves the current employee information and closes the record.

Cancel Cancels the action and exits the record. A prompt will ask you to confirm that you wish to exit the record without saving the information.

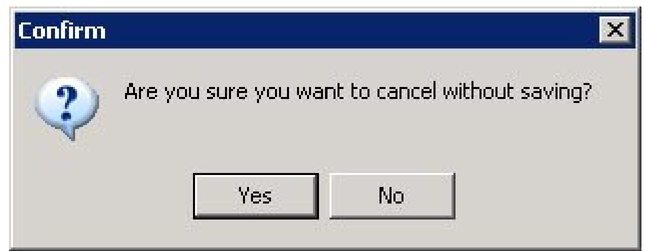


Figure 7-15 Confirm Dialog Box

Delete Deletes the current Employee from the database. This step cannot be undone.
If the employee has been assigned to certain tasks/items, these must be reassigned to another employee before you can delete.

Figure 7-16 Confirm Dialog Box

Figure 7-17 Confirm Dialog Box

Clone Creates an exact duplicate of the current record and creates a New Employee listing in the group selected.

Figure 7-18 New Employee – Admin. Group

If you wish to list this employee in another Group, enter the new employee information, and select the Group Name before you save the record.

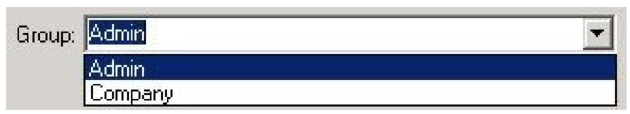


Figure 7-19 New Employee – Group Placement Options.

Print Prints the selected order, estimate, company, etc. Expands to choose what exactly you want to print, Employee Activity Report, Employee Customer Listing, and Employee Info.

New Opens a screen to create a new record.

New Employee Sub Group Opens a dialog window with prompts to create a new employee sub group. Employee sub groups branch out from the main company group displayed at top.

Activities Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

Close Closes an unedited screen.

SPECIAL ACTION MENU FUNCTIONS

As mentioned previously in this manual, the Action menu on the right side of the screen provides the User with varying options depending on what screen the User accesses.

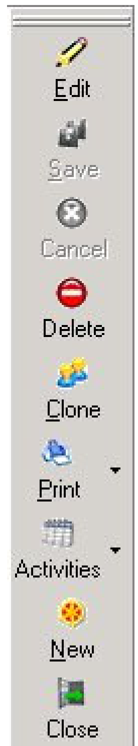


Figure 7-20 Employee Setup Screen Action Menu Options

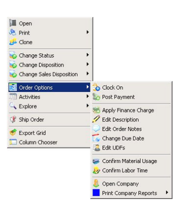
The buttons and their actions as defined in Chapter 1 are typical options for a majority of the screens you will use in Cyrious, however, we will highlight special actions for you so that you learn how to best use the software.

Clone – Copies a pre-existing order, estimate, or product to a new record.

Delete – Removes an estimate or product from the database.

Edit User – Edits the User's information.

Delete User – Click to deactivate the User.



The best way to learn what options are available on the Action menu is by using the software yourself. Once you have Control up and running, take a few minutes to open a few screens and look at some of the drop down menus.

PRINT SUB MENU

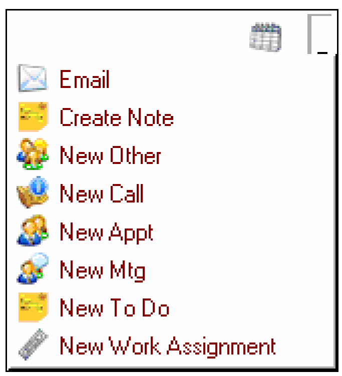
Main Menu | Setup | Employee Setup | Print Action Menu Button

Figure 7-21 Employee Setup Screen Print Action Menu Options

Expands to choose what exactly you want to print, Employee Activity Report, Employee Customer Listing, and Employee Info.

ACTIVITIES SUB MENU

Main Menu | Setup | Employee Setup | Activities Menu Button



Employee Setup ScreenActivities Menu Options

Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

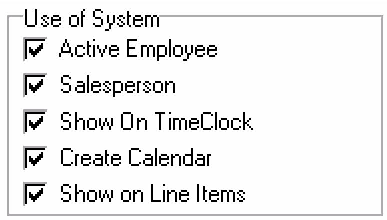
EMPLOYEE INFORMATION TAB

The top portion of this screen is for the employee's business information. Complete as many or as few fields as needed.

You must enter a name in order to save the employee's information.

USE OF SYSTEM

Main Menu | Setup | Employee Setup | Employee Information Tab



Employee Setup Screen Use of System Box

Designates which areas of the system this employee is permitted access.

Active Employee - To have an employee appear throughout Control, check the **Active Employee** box. Former employees are inactive and do not appear in other portions of the software, but you will retain their information in this section.

Salesperson - Check this box to assign salesperson status.

Show on Time Clock - You must check this box to designate an hourly employee.

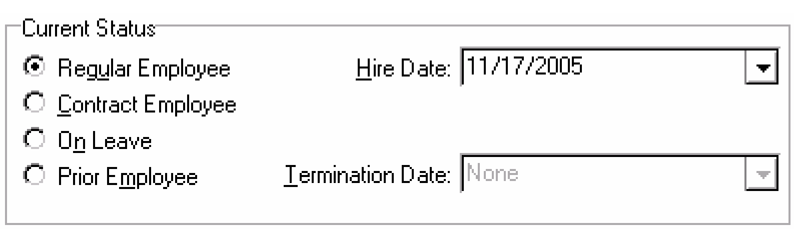
Employees cannot clock in or out unless this box is checked.

Create Calendar - Check this box to have the Schedule tab activated for the employee.

Show on Line Items - Check this box to allow an assign an employee to a line item in a multi-line order for a single company.

CURRENT STATUS

Main Menu | Setup | Employee Setup | Employee Information Tab



Employee Setup Screen Current Status Box

Regular Employee - Designates an employee whose employment is current and permanent. Until you enter a termination date for this employee, they will be able to clock in and out.

Contract Employee – Designates an employee whose employment is current and for a pre-determined period. They will be able to clock in and out until the date specified in the **Termination Date** box.

On Leave – Designates an employee whose employment is current, but the employee is not actually working. Employees marked as On Leave will not be able to clock in or out until you change their status to Regular Employee or Contract Employee.

Prior Employee – Designates a past employee. Employees marked as Prior Employees will not be able to clock in our out.

Hire Date – Must be entered for regular and contract employees in order to clock in and out.

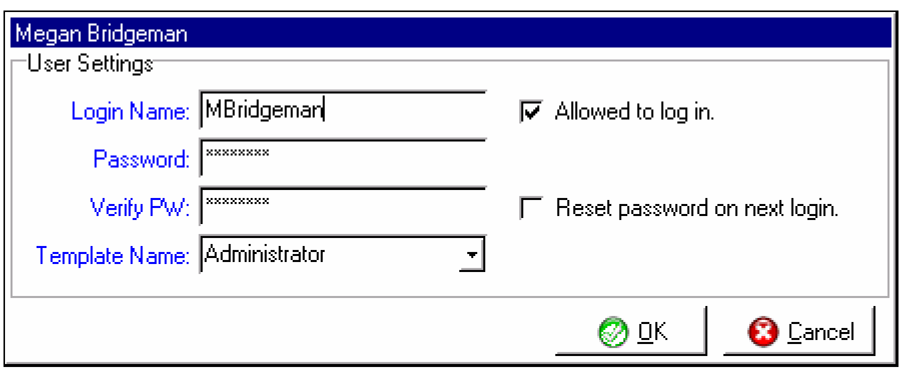
Termination Date – Must enter for prior employees.

PRICING OPTIONS

This is where you will specify their commission rate. Control computes commission for your employees automatically.

ENTERING SECURITY INFORMATION

Main Menu | Setup | Employee Setup | Employee Information Tab | Add User Button



Employee Setup User Settings Pop Up Window

From the main employee screen, click the Add User button in the lower right hand corner of the screen to open an entry screen.

Specify the employee's desired login name

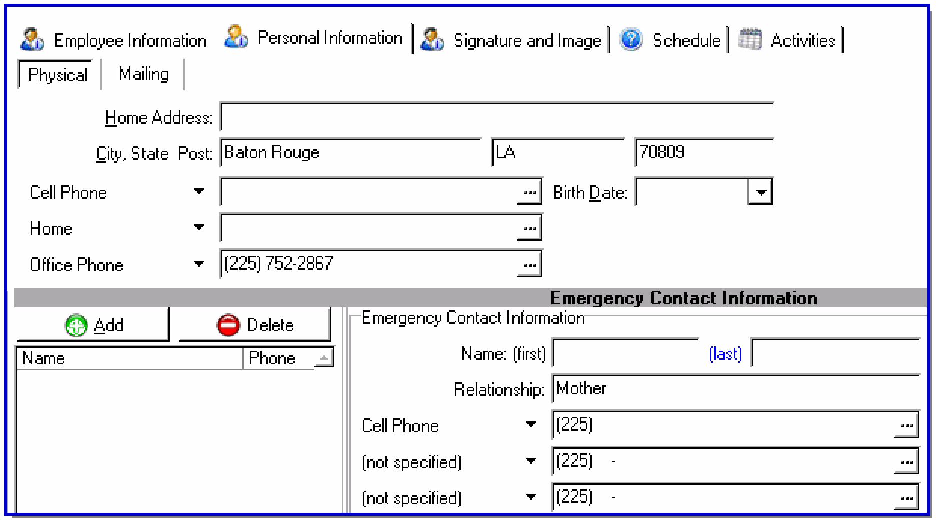
Enter a password

Verify the password

Select the template you wish to make available to the employee, e.g. your Payroll Accountant might need to have access to the Accounts Payable template

PERSONAL INFORMATION TAB

Main Menu | Setup | Employee Setup | Personal Information Tab



Employee Personal Information Tab

Physical Address

In the area below, fill in the employee's physical home address. This may be necessary in case of an emergency and you need to locate family members.

Mailing Address

If your company does not hand out pay stubs or pay checks, and you mail them instead, you will definitely need to enter in a mailing address here. This record will also come in handy when you need to mail out other information regarding health insurance, 401k benefits, etc.

Birth Date

Some employers may be wary about storing this sensitive information in an area potentially viewable by many employees. However, storing the employee's date of birth here may be useful in case of an emergency. You may need to access this information for medical reasons.

It is also a nice way to remember when to buy your employees cake and ice cream!

Emergency Contacts

Click **Add** to open a new emergency contact record

Enter the emergency contact's name, their relationship to the employee, and preferably at least one phone number for the contact

Keep clicking **Add** to enter in as many emergency contact records as needed for that employee

Click **Save** when completed

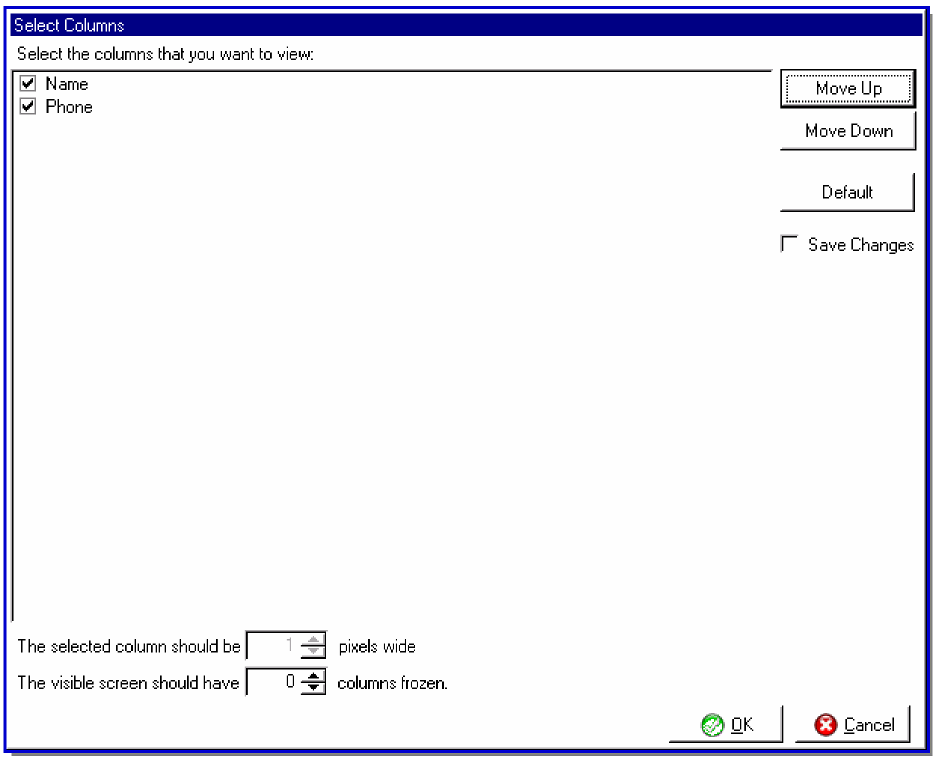
The **Delete** button disposes of an emergency contact record.

RIGHT CLICK OPTIONS

Employee Sub Screen Personal Information
Tab Right Click Options

Export Grid – Creates a file that you can export to another program such as Microsoft Excel.

Column Chooser – Opens a pop up box with a check list of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

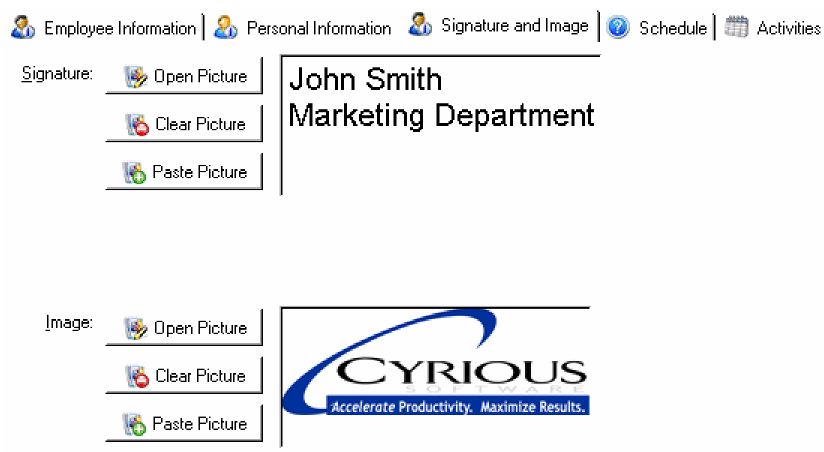


Column Chooser Dialogue

Create your own columns by clicking the **Add Custom Columns** button.

SIGNATURE AND IMAGE TAB

Main Menu | Setup | Employee Setup | Signature and Image Tab



Employee Setup Sub Screen Signature and Image Tab

SIGNATURE

Designates a signature that will show up at the bottom of any documents the employee prints from Control. This may include letters to a customer, invoices, etc.

Open Picture – Opens an Explorer window to search for an image on your computer.

Clear Picture – Clears the currently selected image.

Paste Picture – Pastes an image that saves to your clipboard.

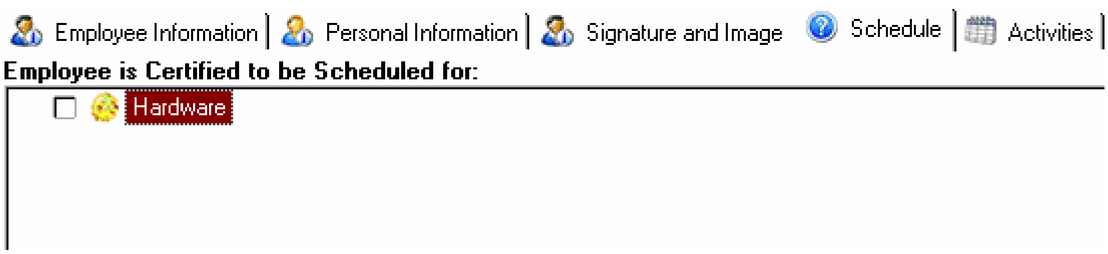
IMAGE

Designates an image to store in the system that other employees can view. This may be helpful if you are part of a rather large corporation and you have employees from different parts of the country or world that otherwise would not be able to put a face to the name.

The commands are the same as for the signature upload.

SCHEDULE TAB

Main Menu | Setup | Employee Setup | Schedule Tab



Employee Setup Sub Screen Schedule Tab

Available jobs are in the large box.

Set up the list of jobs.

Main Menu | Setup | Pricing Setup | Parts Setup

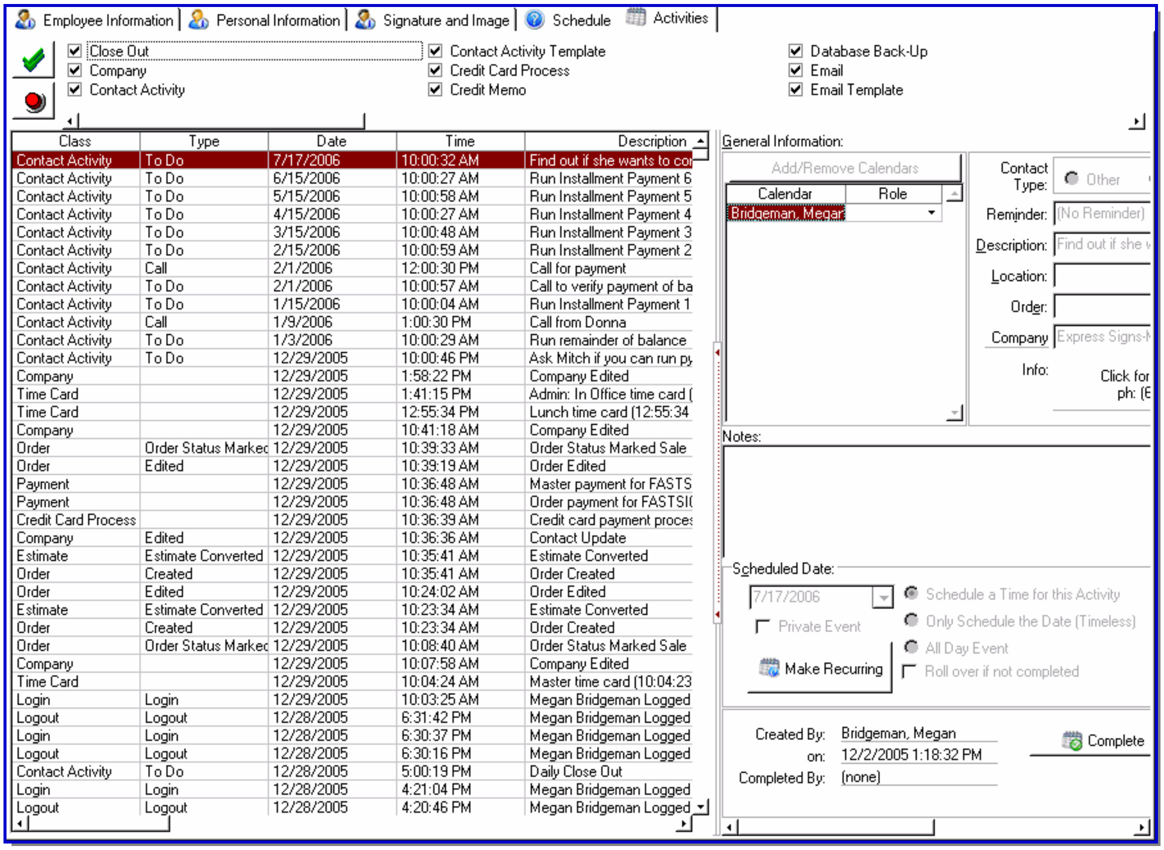
Select the box to the left of a job to assign the employee to it

Click the box again to remove the employee from the assignment

An employee not scheduled for a job in this setup tab will not be able to charge time to it in the Time Clock.

ACTIVITIES TAB

Main Menu | Setup | Employee Setup | Activities Tab



Employee Setup Activities Tab

The Activities tab is a tool to help you track your employees' activities.

Unlike using the Activity Manager for viewing employee actions, this section will allow you to view and schedule more than contact activities, including:

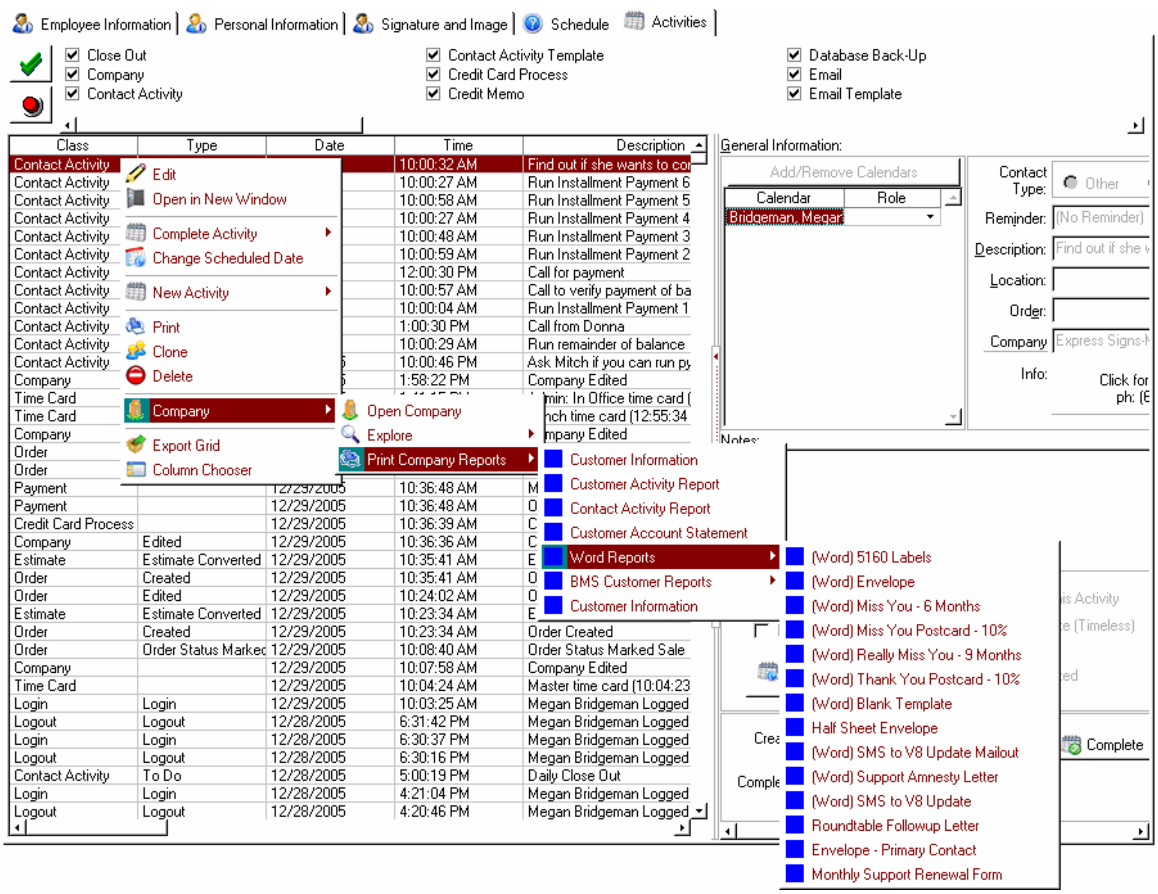
- Close outs
- Credit card processes
- Database back-ups
- Emails sent from Control
- Estimates created/converted
- Databases imported
- Log ins/outs
- Modifiers created
- Notes created
- Orders created
- Parts used
- Payments ran
- Products created
- Reports printed
- Service tickets created

You can select which activities to view for that employee by selecting check boxes in the top query window. The green check button selects all activities. The red circle button clears all check boxes. You can specify which activities you want to view by checking the desired boxes.

If you are looking at contact activities, a detailed screen with the company's contact information will appear on the right side of the screen, including the related order number, the date of the contact, and any notes the employee made after making the contact.

This screen also displays future activities scheduled for the employee.

RIGHT CLICK OPTIONS



Right Clicking the Column Title in an Employee's Activity Tab

Edit – Enters a mode that allows previously saved information to be changed.

Open in New Window – Opens the highlighted record in a new window.

Complete Activity – Expands and displays options for marking the activity as completed.

Change Scheduled Date – Opens a pop up window with a dialog where you can change the date of the activity.

New Activity – Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

Print – Prints the selected order, estimate, company, etc.

Clone - Copies a pre-existing order, estimate, or product to a new record.

Delete – Removes an estimate or product from the database.

Company – Expands with a few options for viewing the company and displaying reports pertinent to the company.

Export Grid – Creates a file that you can export to another program such as Microsoft Excel.

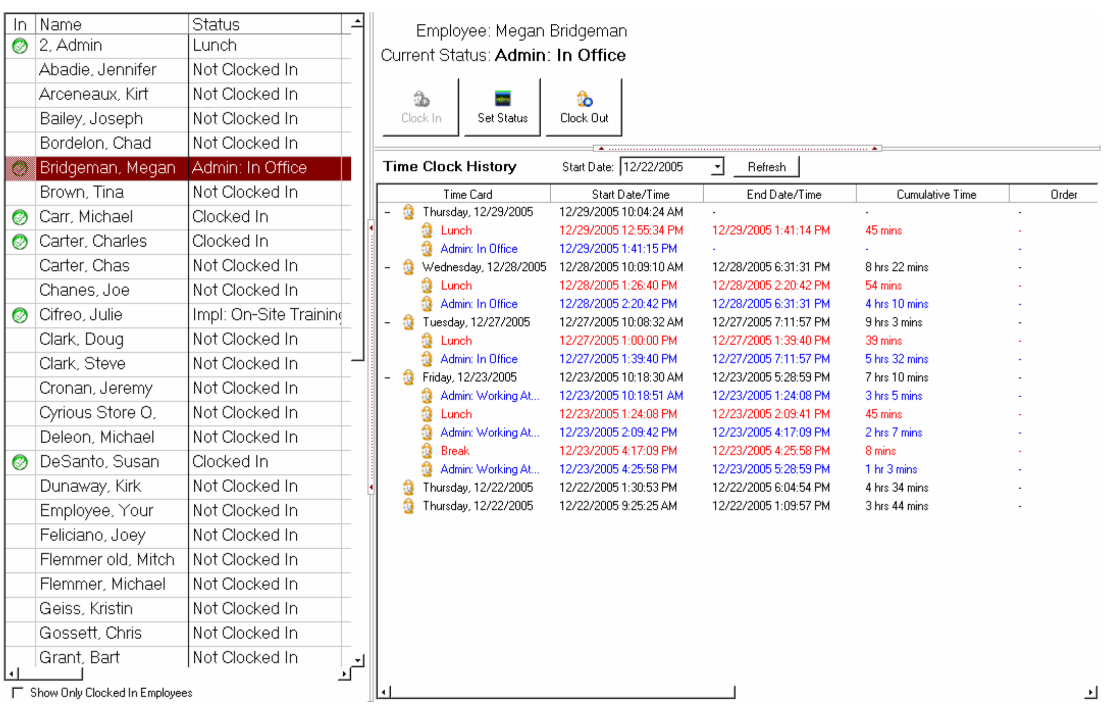
Column Chooser – Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

TIME CLOCK

Main Control Toolbar | Time Clock

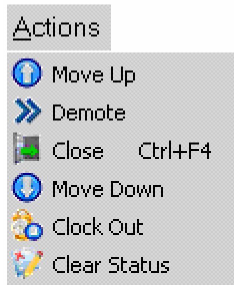
Control Home Page | Time Clock

Access the time clock from the top row of Action buttons from anywhere in Control. The only employees who will appear are those checked in the **Show on Time Clock** box in the Employee Setup screen.



Time Clock Screen

SPECIAL ACTIONS TOOLBAR FUNCTIONS



Time Clock Screen Actions Menu Functions

Close – Closes an unedited screen.

Clock Out – Clocks the highlighted employee out for the day.

Clear Status – Opens a sub menu to change the status of an order. You can also void an order with this button.

Special Action Menu Functions

Edit – Enters a mode that allows previously saved information to be changed.

Save – Saves all entered information.

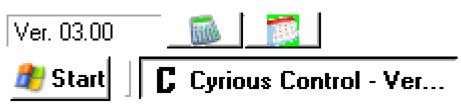
Clock Out – Clocks the highlighted employee out for the day.

Cancel – Disregards changes and additions made to a record.

Clone – Copies a pre-existing order, estimate, or product to a new record.

Close – Closes an unedited screen.

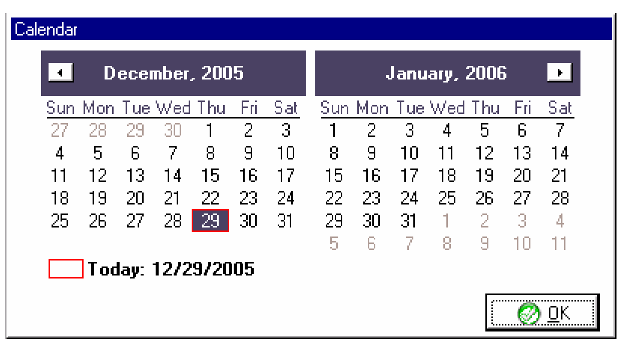
Another Secret Menu in this Area



Calculator and Calendar Buttons

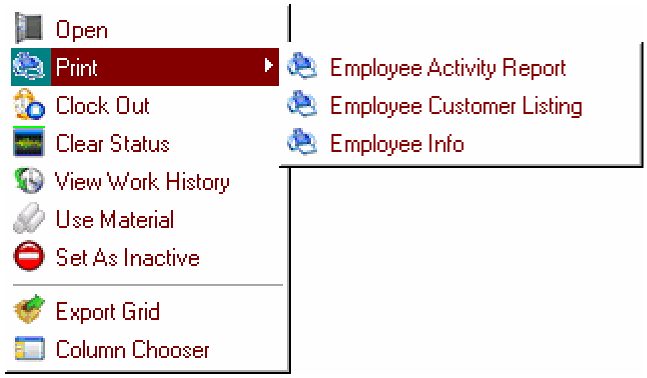
Calculator – Opens the standard Windows calculator.

Calendar – Opens a pop up window showing a small reference calendar.



Calendar Pop Up Window

RIGHT CLICK OPTIONS



Right Click on an Employee's Name in the Grid

Open – Open a record.

Print – Prints the selected order, estimate, company, etc.

Clock Out – Clocks the highlighted employee out for the day.

Clear Status – Opens a sub menu to change the status of an order. You can also void an order with this button.

View Work History – Shows a list of projects that employee has worked on.

Use Material – Designate which employees that employee can use.

Set as Inactive – Sets the designated employee as inactive. This does not delete their record out of the system.

Export Grid – Creates a file that you can export to another program such as Microsoft Excel.

Column Chooser – Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

CLOCKING IN AND OUT

Highlight the employee's name

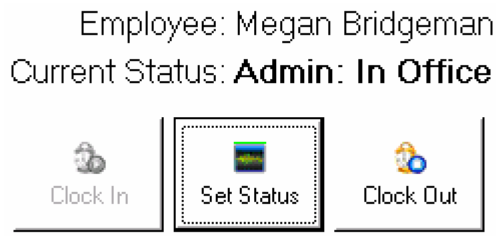
Click the **Clock In** button to begin that employee's time for the day

Click on **Clock Out** when their shift is over

Specify passwords for clocking in and out.

Main Menu | Setup | Options | Store Options | Time Clock Options

SETTING STATUS



Status Area of the Time Clock Screen

After clocking in, you can expand the **Set Status** menu to specify where to bill the employee’s time. Use these statuses to specify how to charge an employee’s time. These statuses are customizable and can even be specific to the projects your company is currently working on.

Employees can select options such as Lunch or Smoke Breaks – and they are not paid for this time.

Once the employee sets his/her status, time will be billed to that area until another status is set or the employee clocks out, whichever comes first.

CLOCKING ON AND OFF PARTICULAR JOBS

Select a status that relates to a work activity, such as Production or Maintenance

Assign an order or estimate to that job in the pop up window

Order – Enter a specific order number. If you do not know it, you can click on the magnifying glass to search for the order in Explorer.

Estimate – Enter a specific estimate number. If you do not know it, you can click on the magnifying glass to search for the estimate in Explorer.

Company – Expands with a few options for viewing the company and displaying reports pertinent to the company.

If you do not produce an exact match in this box, Control will not automatically bill time to that company.

Contact – This option is available after you have entered a company name. Enter the contact name to which you are billing time. You have the option of using the selection list to search for it.

Part – Enter the part name to which you want time to be billed. If you do not know exactly how the record is entered in Control, you have the option of using the selection list to search for it.

Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

Some customers will require a detailed breakdown, so it is a good habit to get into using this feature for all projects.

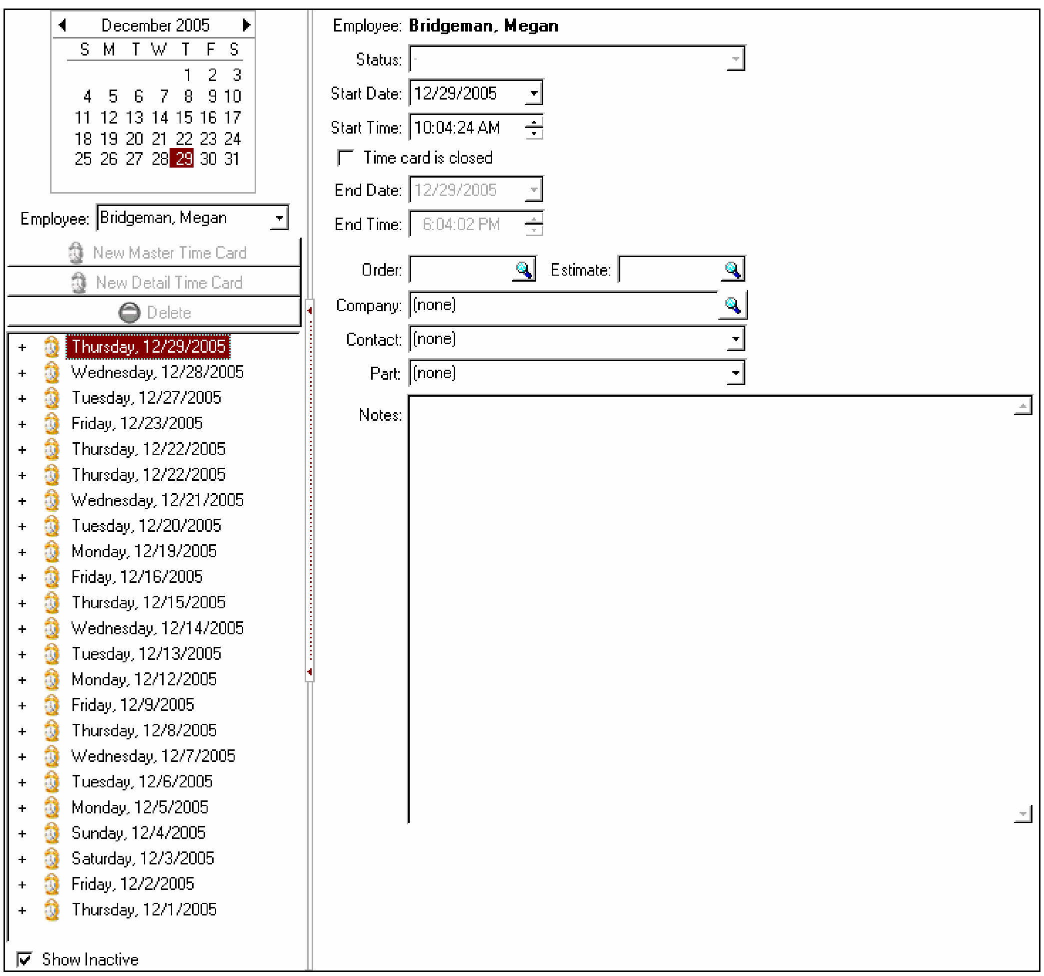
Password – The employee scheduling time to a project is required to enter in their password for verification after they have completed all information fields.

Customize jobs.

Main Menu | Setup | Options | Store Options | Time Clock Options

TIME CLOCK ADJUSTMENTS

Access Time Clock | Tools Menu | Time Clock Adjustment



Time Clock Adjustment Screen

An employee has to have previously clocked in to activate this selection.

Select the appropriate day from the calendar

Choose the desired employee from the drop-down box directly below the calendar

Click the **Edit** button to activate the screen for changes

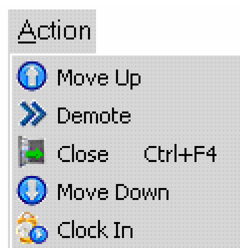
Use the time and date fields in the center of the screen to complete your changes

Select the **Time Card is Closed** box to enter in an end time

Select **Save** to complete your changes

You must make sure that when adjusting times you refrain from overlapping the time that a person is clocked in or out, to the second. If adjustments are incorrect, an employee may be compensated incorrectly.

SPECIAL ACTIONS TOOLBAR FUNCTIONS



Time Clock Adjustment Actions Menu Options

Close – Closes an unedited screen.

Edit – Enters a mode that allows previously saved information to be changed.

Delete – Removes an estimate or product from the database.

New Master Timecard – Opens a new master timecard.

New Detail Timecard – Opens a new detailed timecard.

CREATING NEW TIME CARDS

Open the Time Clock Adjustment Screen

Select the **New Master Time Card** button

Alternatively, to create a time card that will show status descriptions:

Open the Time Clock Adjustment screen

Select the **New Detail Time Card** button

8 : PAYMENTS & ACCOUNTING

CONCEPT

No business software would be complete without exceptional capability to track your incoming payments. Cyrious integrates your Accounts Receivable with your banking system, your inventory, and your order completion.

The point-and-click interface makes it easy for your employees to post payments to the system. Activity Manager records each payment an employee posts, providing managers easy access to records should disputes arise.

PAYMENT ENTRY SCREEN

Main Toolbar | Payment Entry

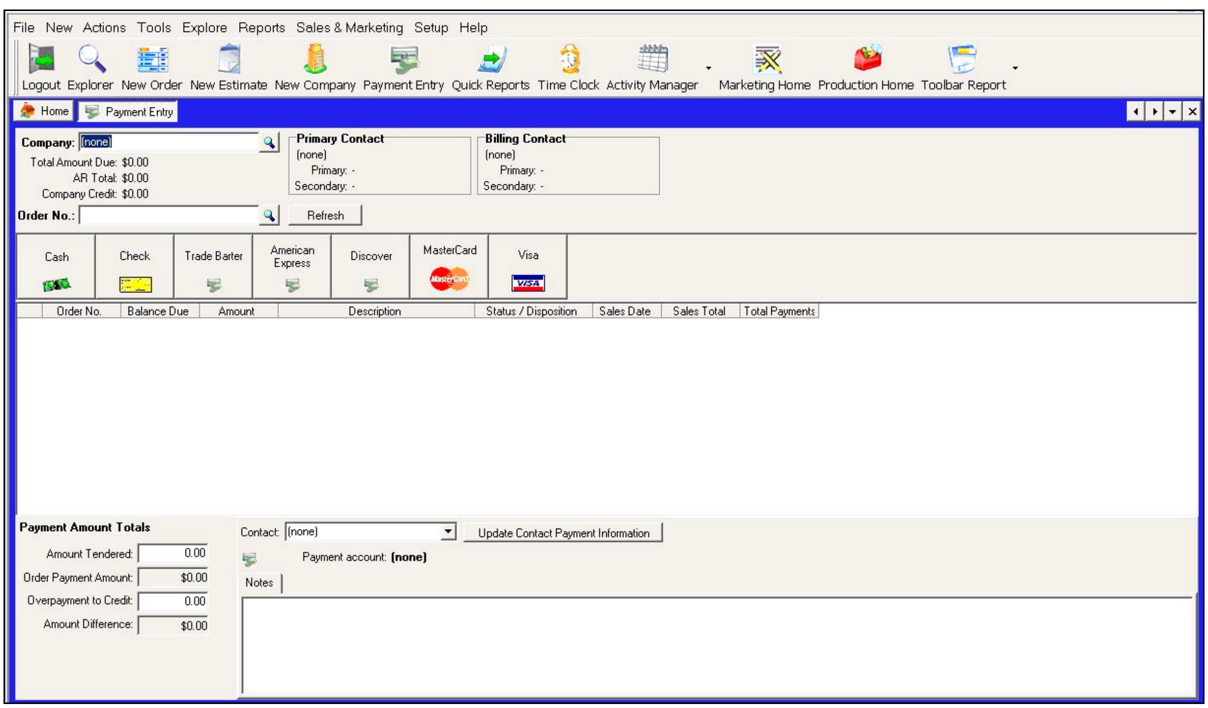


Figure 8-1 Payment Entry Screen

COMPANY

Before any payment entries can be made, the Company must be selected.

This can be done by entering the Company Name manually or by selecting the Explorer button and nominating the required Company.

Figure 8-2 Enter Company Name

Figure 8-3 Explorer Button – Select Company

Figure 8-4 Company Payment & Contact Details

Figure 8-5 Company Contacts Details

Total Amount Due

PAYMENT OPTIONS

Figure 8-6 Payment Options Selection Buttons

Payment options selection buttons provide quick access to all of the types of payments available in Cyrious Control. Select the appropriate button and the options available for that payment type will appear in the lower half of the payment entry screen.

Figure 8-7 Example – Check Payment Selected

ORDER DETAILS

The Order Details for the selected Customer appear in the window directly below the Payment Options.

	Order No.	Balance Due	Amount	Description	Status / Disposition	Sales Date	Sales Total	Total Payments
☐	1002	$415.51	0.00	Grand Format Prints	WIP / Design	-	$415.51	$0.00
☐	1003	$379.97	0.00	Office Signage	WIP / Layout	-	$379.97	$0.00
☐	1004	$597.32	0.00	Office Signage	WIP / (none)	-	$597.32	$0.00

Figure 8-8 Customer Order Details

	Order No.	Balance Due	Amount	Description	Status / Disposition	Sales Date	Sales Total	Total Payments
☑	1002	$415.51	415.51	Grand Format Prints	WIP / Design ...	-	$415.51	$0.00
☑	1003	$379.97	379.97	Office Signage	WIP / Layout ...	-	$379.97	$0.00
☐	1004	$597.32	0.00	Office Signage	WIP / (none)	-	$597.32	$0.00

Figure 8-9 Customer Order Details – Order Selected

When the Invoice Number is selected, the Amount (in blue) is automatically filled in.

The Status or Disposition may be changed at this point – select the ellipsis button and

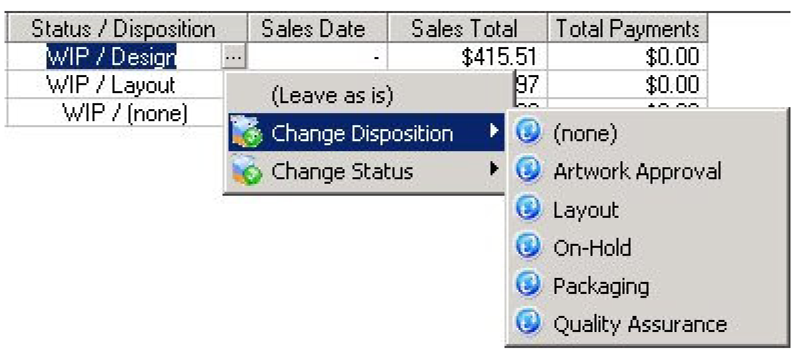


Figure 8-10 Change Disposition Options

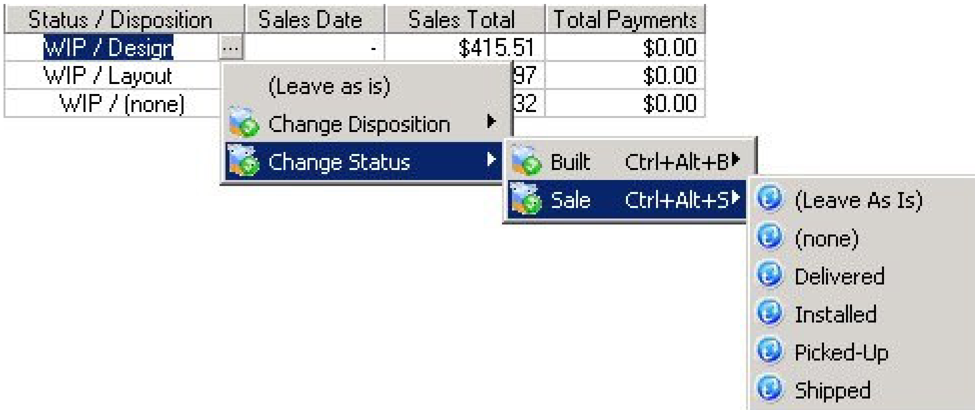


Figure 8-11 Change Status – Built Options

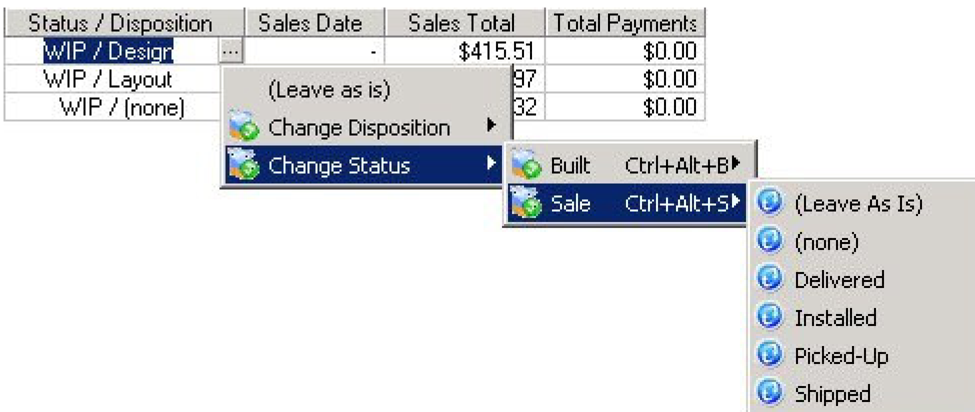


Figure 8-12 Change Status – Sale Options

Figure 8-13 Update Contact Payment Information Selection Button

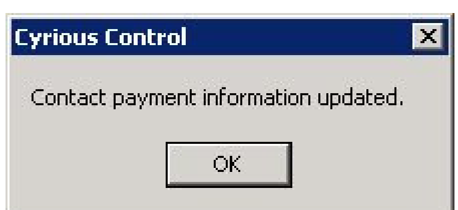


Figure 8-14 Contact Payment Information Update Confirmation Dialog Box

When payment entry for that client has been entered and updated, you can then select the next Company and repeat the process.

CASH

Figure 8-15 Cash Payment Entry Options

CHECK (CHEQUE)

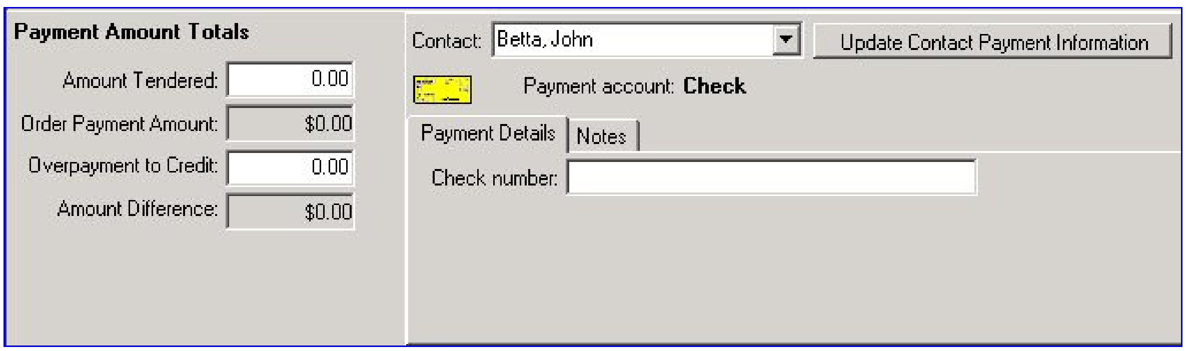


Figure 8-16 Check (Cheque) Payment Entry Options- Payment Details Tab

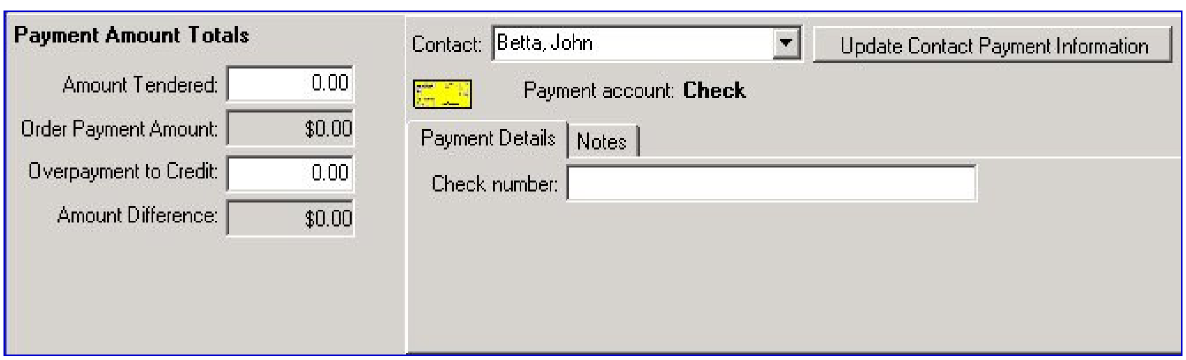


Figure 8-17 Check (Cheque) Payment Entry Options- Notes Tab

TRADE BARTER

Figure 8-18 Trade Barter Payment Entry Options

AMERICAN EXPRESS

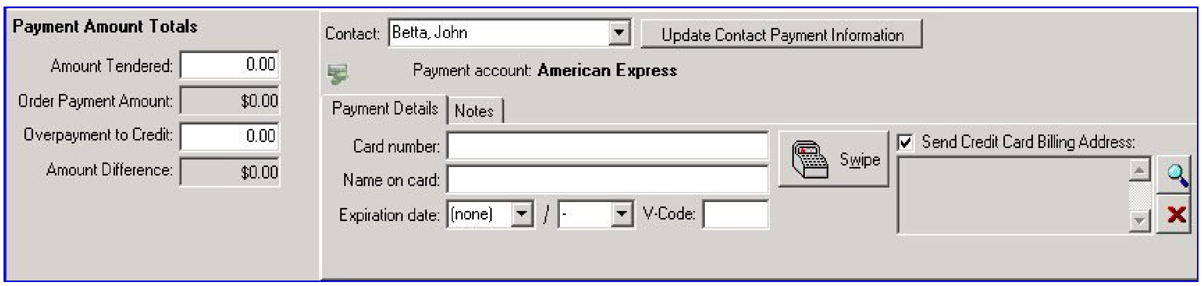


Figure 8-19 American Express Payment Entry Options- Payment Details Tab

Figure 8-20 American Express Payment Entry Options- Notes Tab

DISCOVER

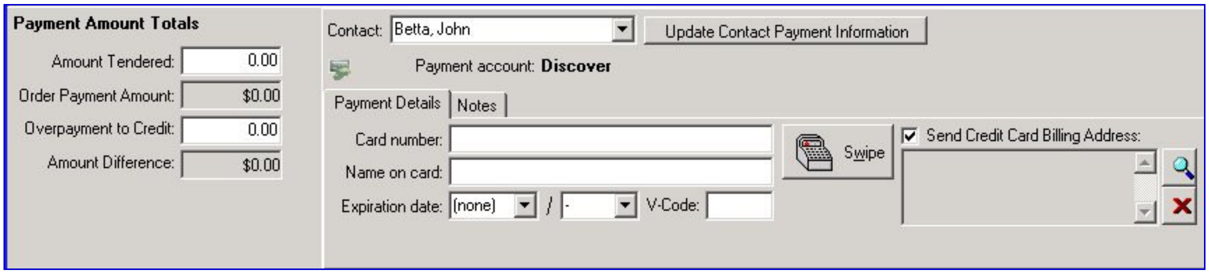


Figure 8-21 Discover Payment Entry Options- Payment Details Tab

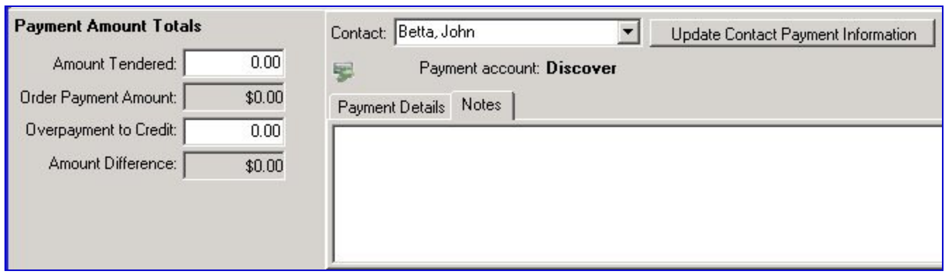


Figure 8-22 Discover Payment Entry Options- Notes Tab

MASTERCARD

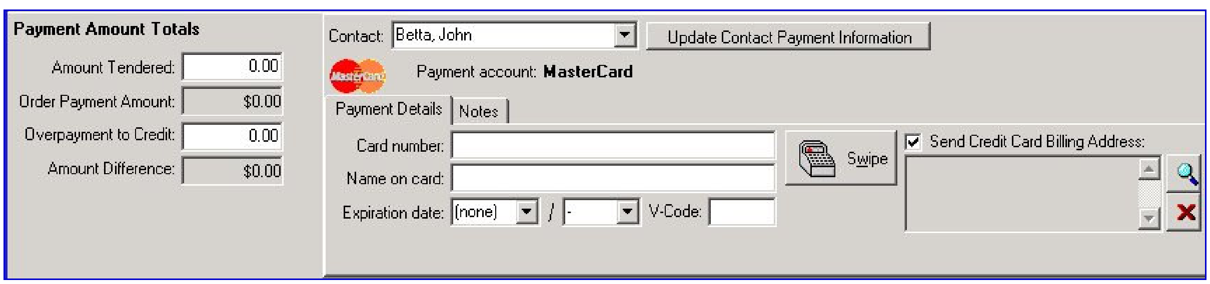


Figure 8-23 MasterCard Payment Entry Options- Payment Details Tab

Figure 8-24 MasterCard Payment Entry Options- Notes Tab

VISA

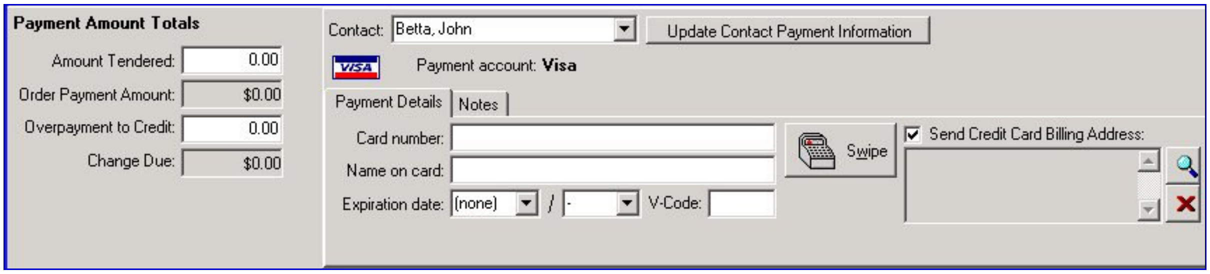


Figure 8-25 Visa Payment Entry Options-Payment Details Tab

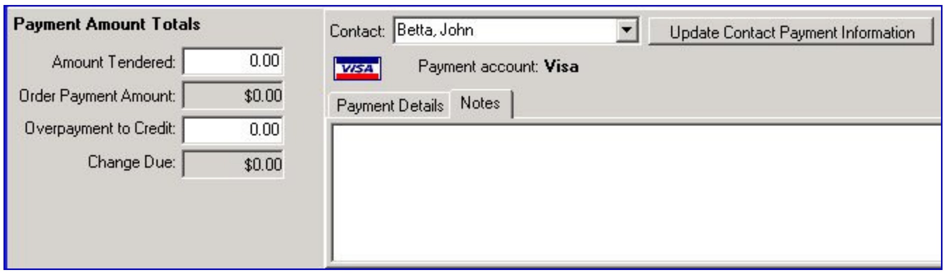


Figure 8-26 Visa Payment Entry Options –Notes Tab

	**Company**	Expands with a few options for viewing the company and displaying reports pertinent to the company.
	Total Amount Due	Displays the total amount due for payment from that company.
	AR Total	Displays the total amount of money received from that company.
	Company Credit	Displays the amount of credit available to the company.
	Order No.	Enter a specific order number. If you do not know it, you can click on the magnifying glass to search for the order in Explorer.
	Primary Contact	This option is available after you have entered a company name. Enter the contact name to which you are billing time. You have the option of using the selection list to search for it.
	Billing Contact	This option is available after you have entered a company name. Enter the contact name to which you are billing time. You have the option of using the selection list to search for it.
	**Cash**	Select if you are accepting a cash payment.

Check Select if you are accepting payment by check. The window will prompt you to enter in a check number.

Trade Barter Select if you are accepting trade barter. The window will prompt you to enter details.

American Express Select if you are accepting payment via American Express. The window will prompt you to enter credit card information.

Discover Select if you are accepting payment via Discover card. The window will prompt you to enter credit card information.

MasterCard Select if you are accepting payment via MasterCard. The window will prompt you to enter credit card information.

Visa Select if you are accepting payment via Visa. The window will prompt you to enter credit card information.

Other payment options, such as eCheck, are available from Cyrious. Please contact us if you would like additional information.

Amount Tendered The amount the customer is paying.

Order Payment Amount The total amount for the order

Overpayment to Credit Additional money a customer is paying. Some customers may prefer to pay $100.00 instead of $97.42, and then the overpayment will go to their credit account.

Amount Difference If the amount appears in red, the customer is not paying the entire bill. If the amount is not a zero amount, Cyrious will not allow you to process the payment.

Contact This option is available after you have entered a company name. Enter the contact name to which you are billing time. You have the option of using the selection list to search for it.

Update Payment Information Click this button to update the customer’s financial record with the payment information you have entered in this box.

Notes Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

EXPLORER RIGHT CLICK OPTIONS

The right-click menu options available in Explorer are many and relative to orders, status, disposition and activities.

Take some time to view these options.

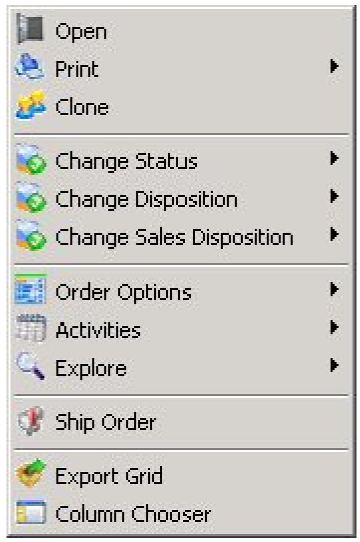


Figure 8-27 Explorer Customer Orders Right Click Menu

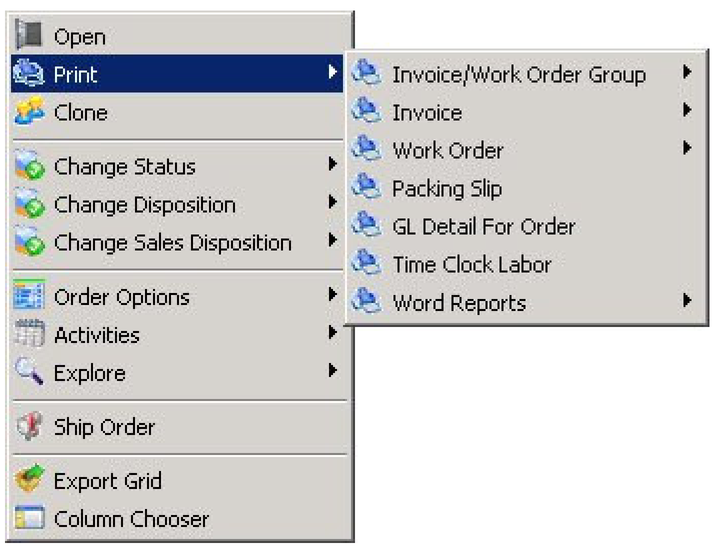


Figure 8-28 Explorer Customer Orders Right Click Menu Print Options Submenu

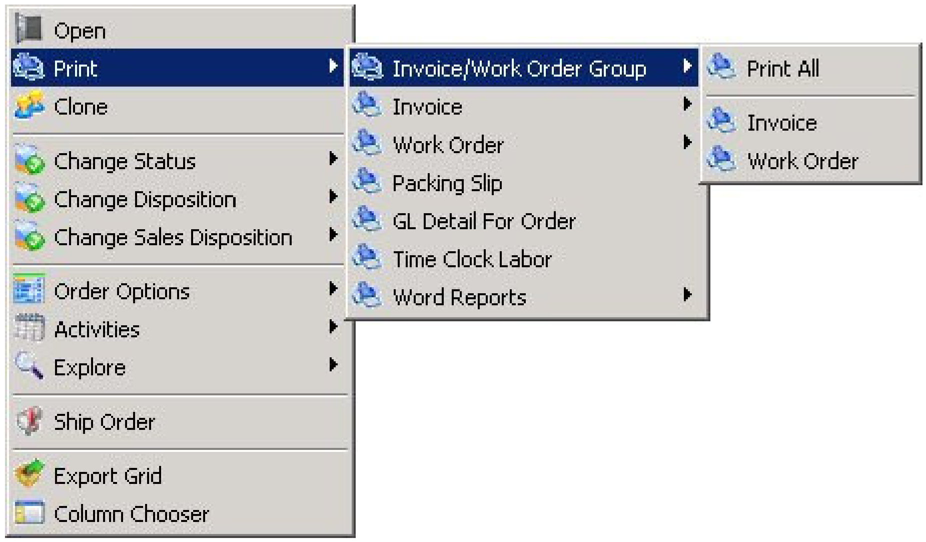


Figure 8-29 Print Invoice/Work Order Group Submenu

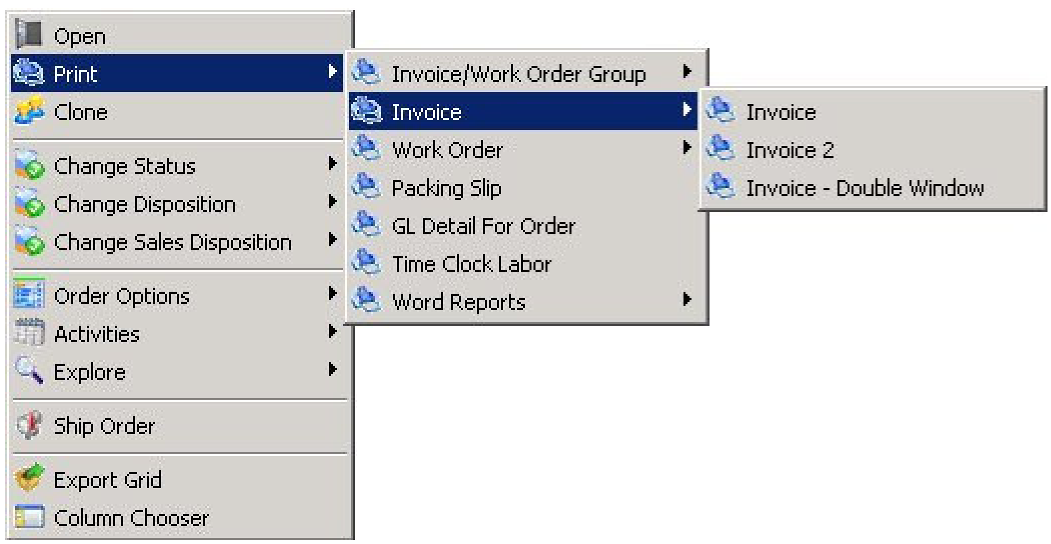


Figure 8-30 Print Invoice Submenu

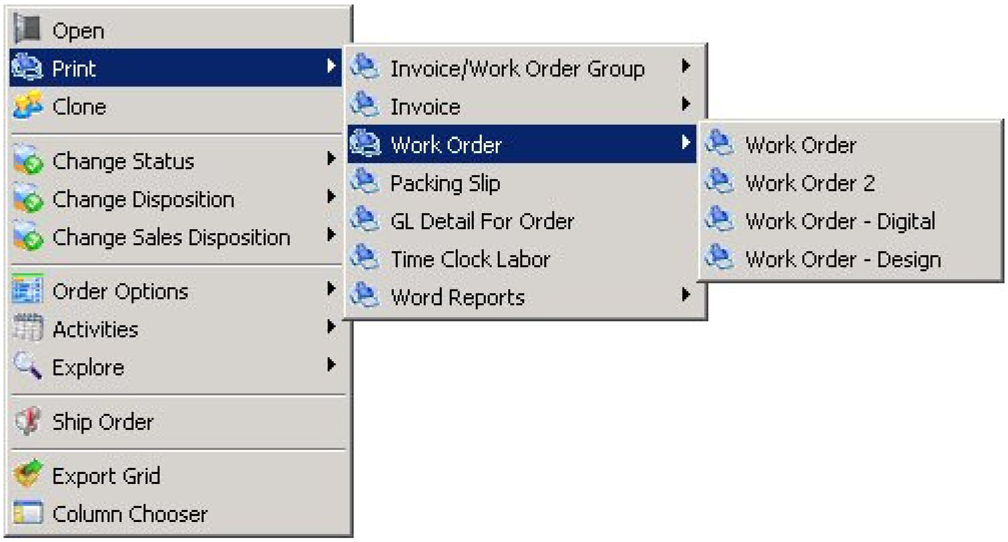


Figure 8-31 Print Work Order Submenu

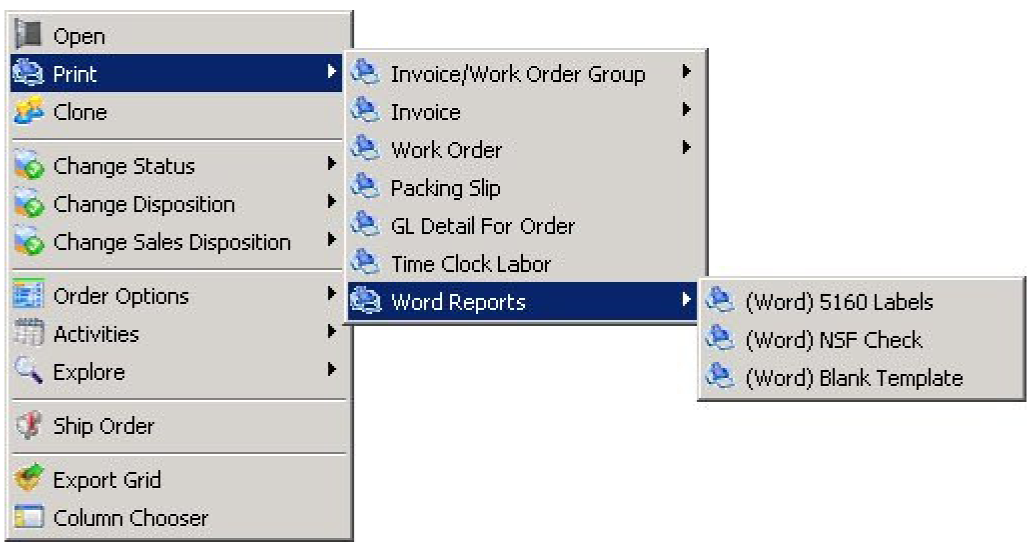


Figure 8-32 Print Word Reports Submenu

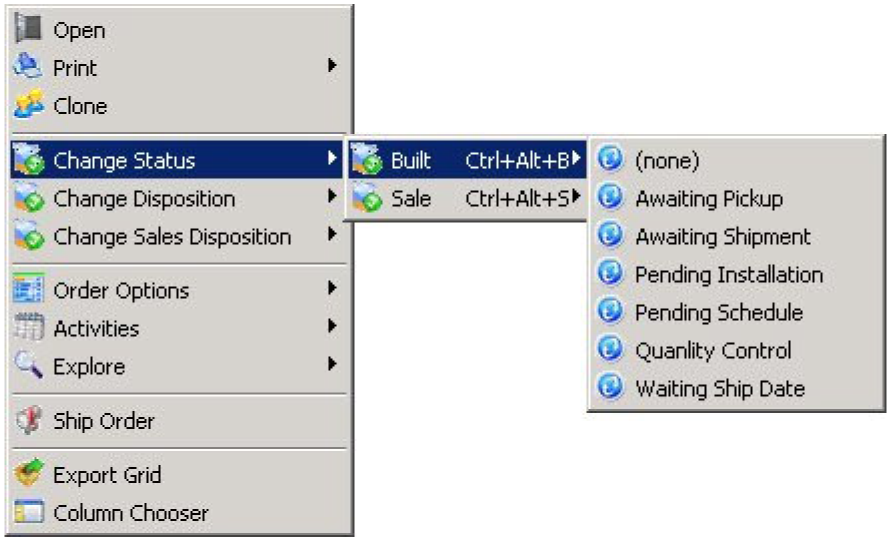


Figure 8-33 Change Status – Built Submenu

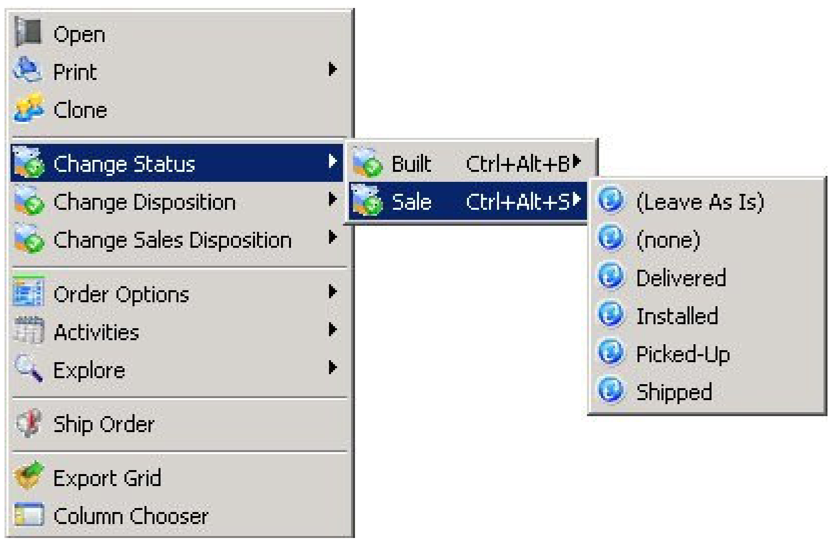


Figure 8-34 Change Status - Sale Submenu

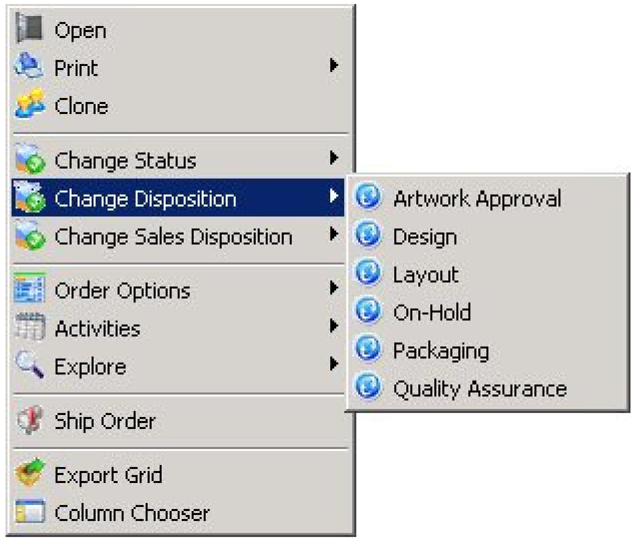


Figure 8-35 Change Disposition Sub Menu

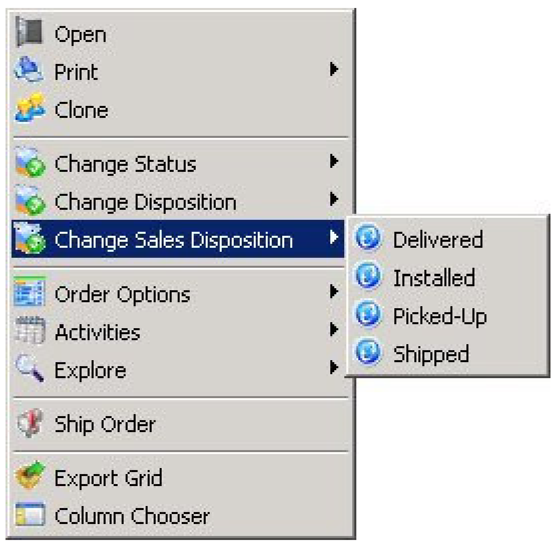


Figure 8-36 Change Sales Disposition Sub Menu

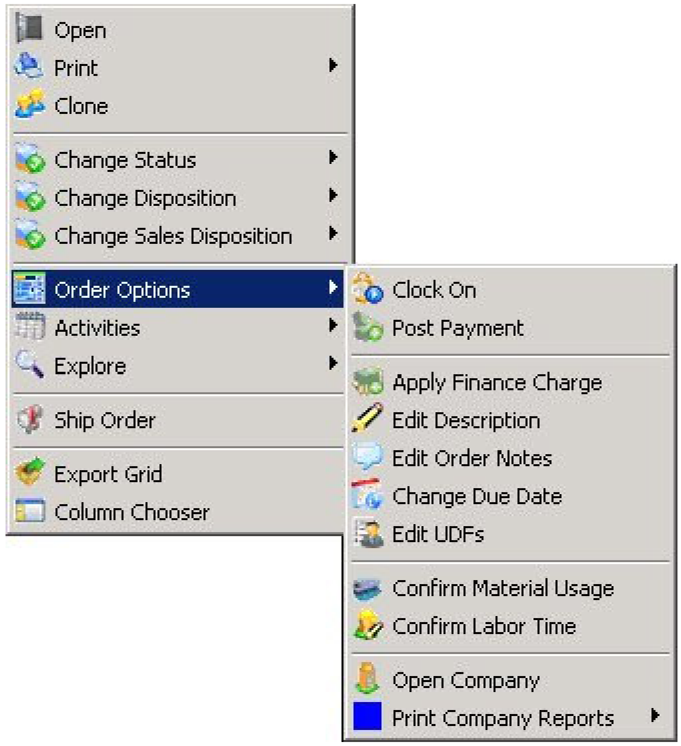


Figure 8-37 Order Options Sub Menu

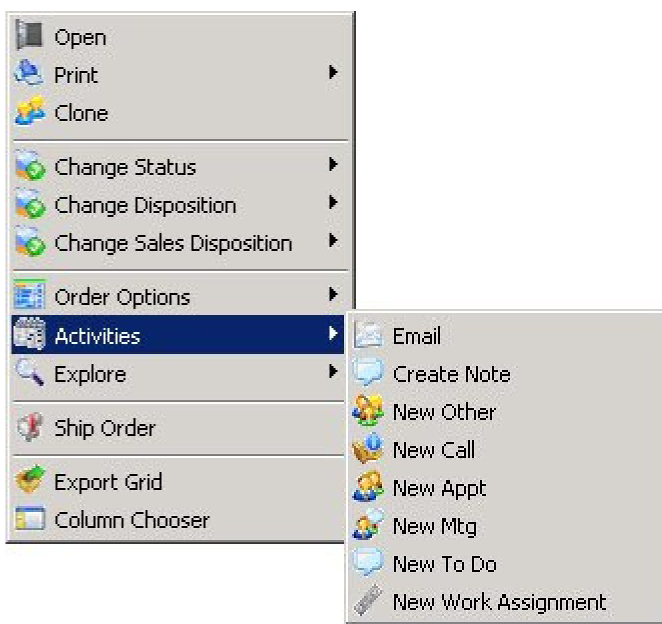


Figure 8-38 Activities Options Sub Menu

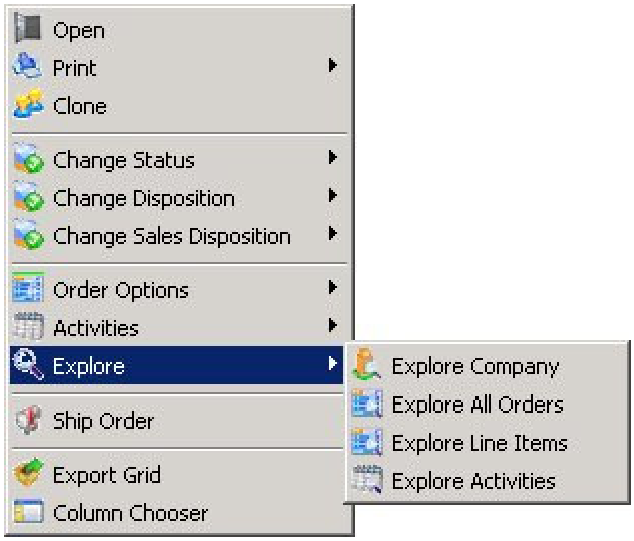


Figure 8-39 Explore Options Sub Menu

SPECIAL ACTIONS TOOLBAR FUNCTIONS

Figure 8-40 Payment Entry Screen Actions Menu Options

Close – Closes an unedited screen.

EFFECTIVE USE

PROCESS PAYMENTS EFFICIENTLY

If you have a fast-paced business, it is a good idea to integrate at least one swiping machine with Cyrious. When you choose to apply a credit card payment, you can then swipe the card, rather than having to type numbers in.

You can also access the payment screen when you have an order window open, or by selecting the Post Payment option when right clicking on the order from the order grid in Explorer.

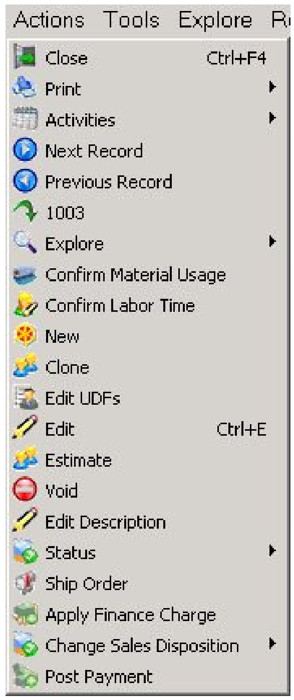


Figure 8-41 Action Menu : Post Payment Option From Open Order Screen

Figure 8-42 Right-Click Menu - Post Payment Option

SAFE PAYMENTS

Cyrious requires verification codes for all credit card transactions.

eCHECKS

Processing eChecks will require you to purchase standalone software.
For more information, contact Cyrious Software.

9 : EXPLORER

CONCEPT

Explorer is a tool used throughout Control to assist you in locating companies, orders, estimates, activities, and a variety of other information you may need while using Control. You may access Explorer from the Home screen, action toolbar, or by selecting the magnifying glass icon found in multiple places in the program.

Main Toolbar | Explorer

Home Page | Explorer

MAIN SCREEN

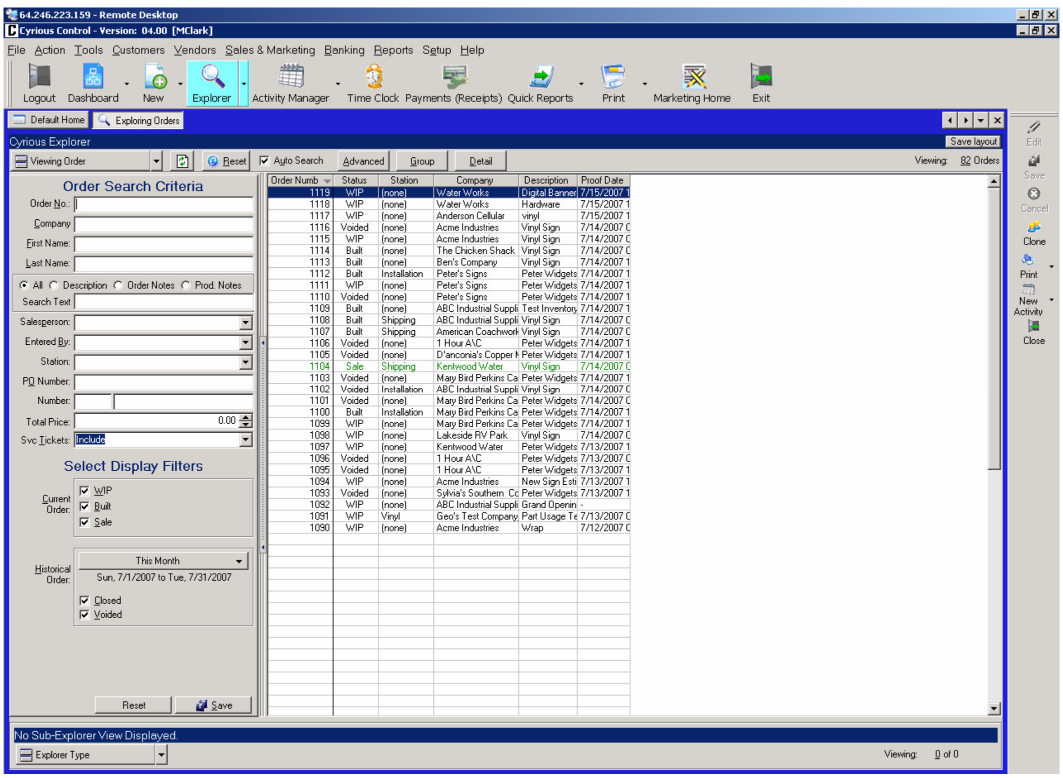


Figure 9-1 Explorer Main Screen(Sub Explorer Not Shown)

The Explorer main screen is made up of four areas.

Toolbar Select different views and options.

Figure 9-2 Explorer Toolbar

Order Search Criteria Specify exactly what you are searching for. Explorer uses numerous criteria to filter search results.

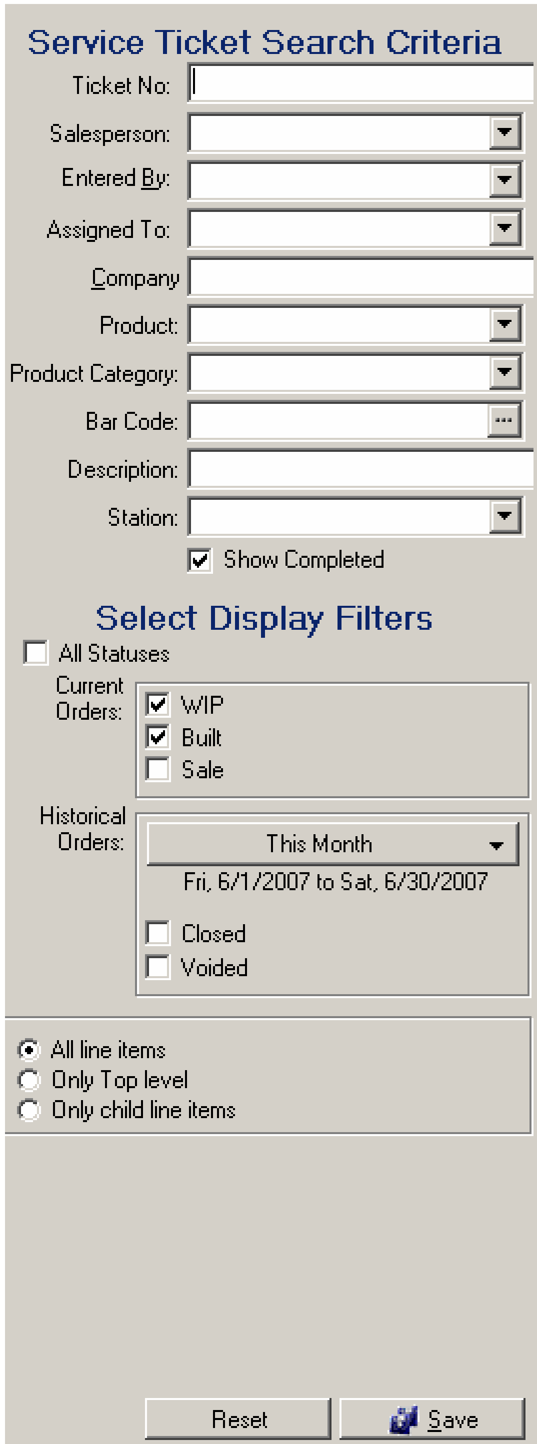


Figure 9-3 Order Search Criteria

Results Window Display the search results.

Order Numb	Status	Disposition	Company	Description	Proof Date
1004	WIP	(none)	Betta Real Estate	Office Signage	5/19/2006 1
1003	WIP	Layout	Betta Real Estate	Office Signage	5/18/2006 1
1002	WIP	Design	Betta Real Estate	Grand Format	5/18/2006 1
1001	Closed	Picked-Up	Betta Real Estate	Grand Format	5/18/2006 1
1000	Voided	(none)	Reed Signs	Grand Format	5/18/2006 1

Figure 9-4 Explorer Results Window

Sub Explorer Screen Display a set of records associated with the search results.

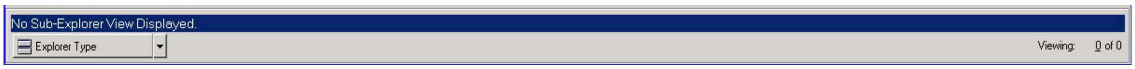


Figure 9-5 Sub Explorer Screen – No View Displayed

Figure 9-6 Sub-Explorer Screen- Viewing Company Selected

The Sub Explorer screen is covered in more detail in the following section.

VIEWING OPTIONS

Use the drop-down menu on the left-hand side of the screen to select the type of file you are searching for.

Drop-down list for selecting other items to view.

Viewing Order

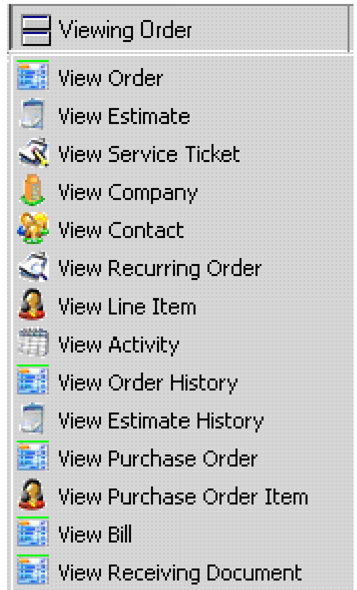
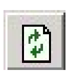


Figure 9-7 Viewing Order Options Drop-down List



Refresh

Click this button if your screen does not display results immediately after you hit the Search button.

Reset

Click this button to clear all entry fields and results.

Auto-Search

Continuously updates your search as you enter new information into the fields, without having to press Enter.

This option will slow your system down if it is updating a high quantity of results.

Advanced

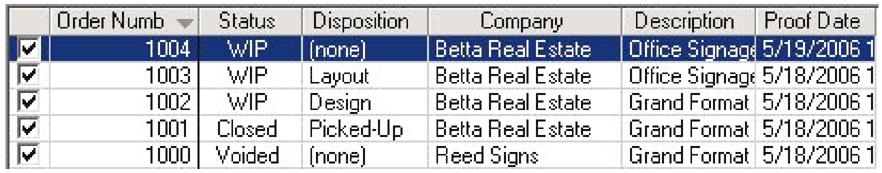
Selecting this button toggles between the simple and advanced modes of searching.

Alternating between modes will delete the results of the current search.

Groups your results by the criteria across the top of the screen. When selected a tick appears in all checkboxes to the right of the

Group

results window.



	Order Numb	Status	Disposition	Company	Description	Proof Date
☑	1004	WIP	(none)	Betta Real Estate	Office Signag	5/19/2006 1
☑	1003	WIP	Layout	Betta Real Estate	Office Signag	5/18/2006 1
☑	1002	WIP	Design	Betta Real Estate	Grand Format	5/18/2006 1
☑	1001	Closed	Picked-Up	Betta Real Estate	Grand Format	5/18/2006 1
☑	1000	Voided	(none)	Reed Signs	Grand Format	5/18/2006 1

Figure 9-8 Search Results - Group Selected

When the Group button is selected, additional buttons also become available. This allows for individual lines to be unselected.

Figure 9-9 Additional Group Selection Buttons

Use these groups to organize information to print or to use in macros.

Select All

Click to Select all search result items.

Unselect All

Click to Unselect all search result items.

Detail

Click to reveal the detail of the highlighted selection.

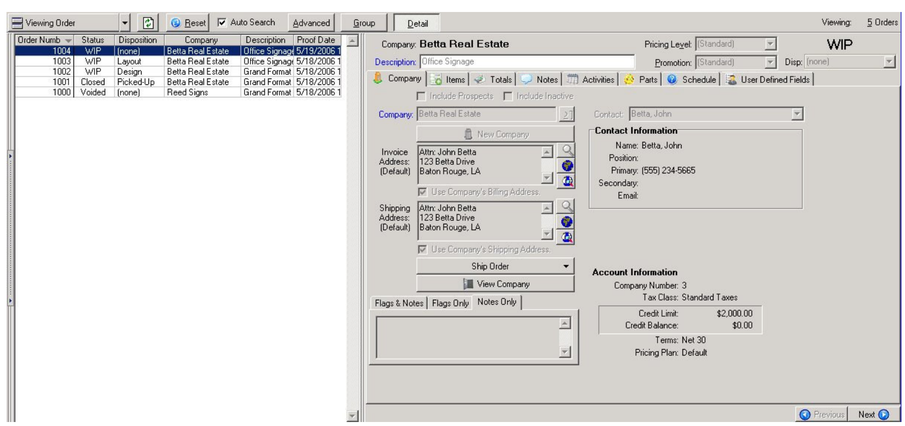
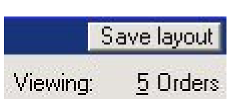
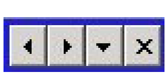


Figure 9-10 Results Window with Company Details



Located at the top right of the Explorer screen, this option allows you to save the current screen layout.



Located at the top-right corner of the Explorer screen, these buttons provide quick access to the Previous Home screen, Next Home screen, Drop-down menu showing all open screens and Close Current screen.

Figure 9-11 Navigation Buttons - Drop-down Menu

DEFAULT HOME SCREEN

Main Menu | Setup | Employee Setup

Each user can change the default Home Screen to suit the Group or department they are working in. For example: some employees may only need to access the Marketing Screen while others need Explorer.

Figure 9-12 Individual Employee Name Selected

Figure 9-13 Group Default Home Screen (Marketing) Selected

Figure 9-14 Employee Home Screen (Default) Selected

When the Save option is selected, a dialog box appears to confirm that the Employee must exit Cyrious and restart before this change takes effect.

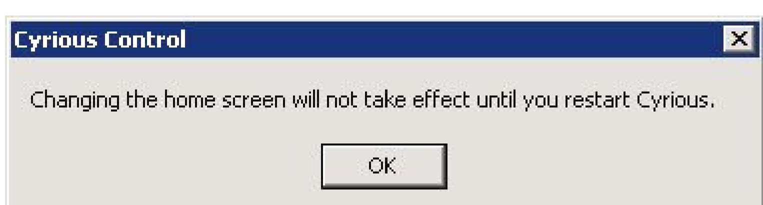


Figure 9-15 Information Dialog Box

SPECIAL ACTIONS MENU COMMANDS

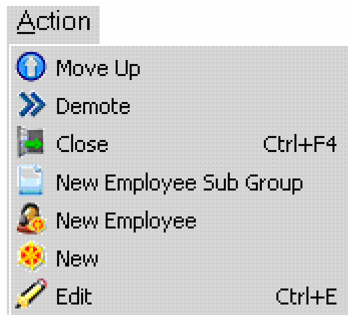


Figure 9-16 Explorer Action Menu Commands

Close	Closes the Explorer window.
Print	A sub menu provides a variety of print options.
Activities	

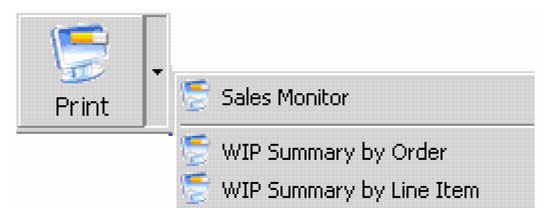


Figure 9-17 Actions – Activities Sub Menu

VIEW ORDER

Main Menu | Setup | Options Setup

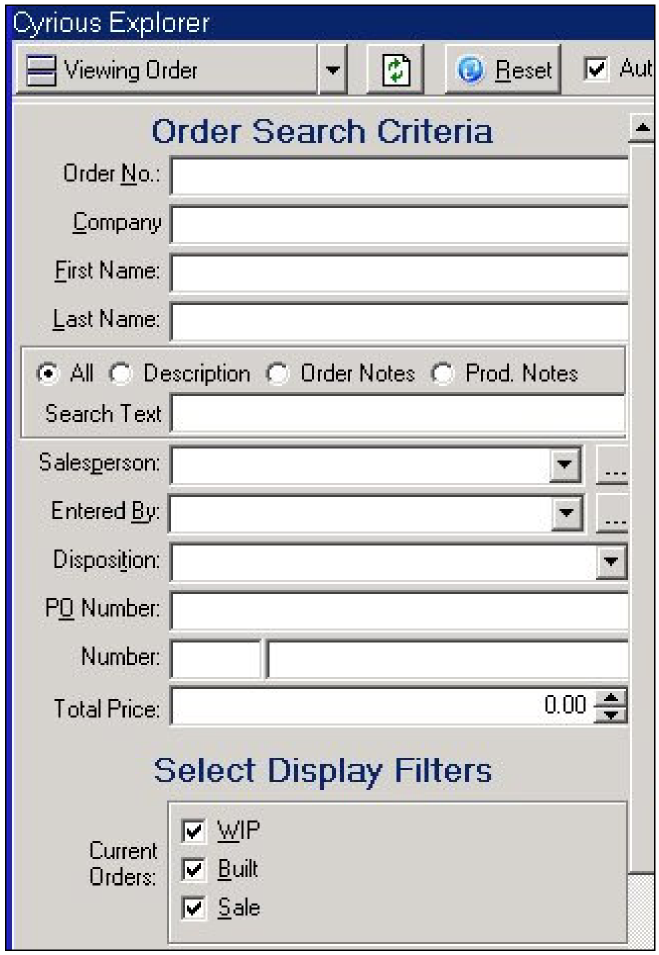


Figure 9-18 Explorer Viewing Order Screen

Order No.	Enter a specific order number. If you do not know it, you can click on the magnifying glass to search for the order in Explorer.
Company	Expands with a few options for viewing the company and displaying reports pertinent to the company.
Names	Searching for a name will search all names associated with an order, not just the primary contact.
Search Text	Search descriptions of all line items.
Salesperson	Select the salesperson for the order.

Disposition Select the type of order.

P.O. Number Enter a specific Purchase Order Number.

Numbers Searching numbers will search all forms of telephone contacts (office, cellular, etc.).

Divisions You must enable divisions before you can search for them.

Total Price Search by entering the total price of the order.

Service Tickets You may choose to include service tickets in a search.

Display Filters Use the filters to narrow your search. Using the Historical Orders filter will search both temporal records and those sorted by closeout dates. Click on This Month to reveal a selection of filters from which to choose. You can also search closed and voided orders.

Figure 9-19 Viewing Orders - Display Filters Options

Current Orders Select to view works in progress (WIP), Built, or Sale orders.

Historical Orders Click on this button to select a date range for your search.

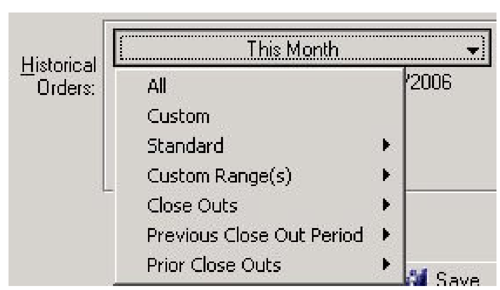


Figure 9-20 Viewing Orders - Historical Orders Options

Reset/Save The options selected for your Search can be saved as the default or, they can be reset to the original default.

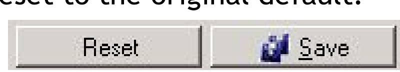


Figure 9-21 Viewing Orders - Display Filters Options

RIGHT CLICK OPTIONS

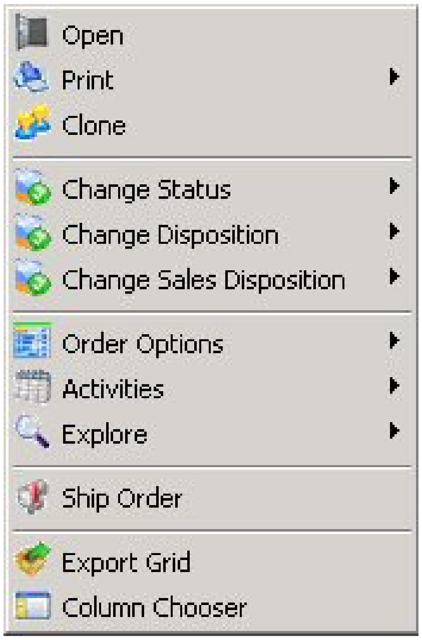


Figure 9-22 Right Click Options Main Menu

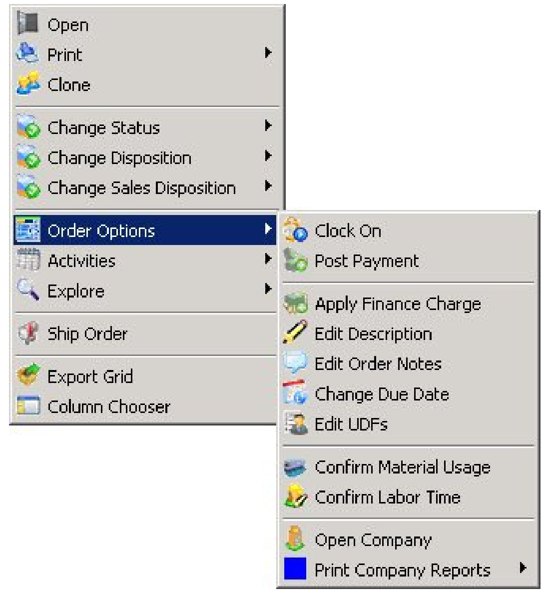


Figure 9-23 Order Options Sub Menu

There are many more options available from the right click menu. These are found in the sub menus indicated by the arrow to the right of the menu option.

Figure 9-24 Some of the Options with Sub Menus

These options are covered in details in the following section.

VIEW ESTIMATE

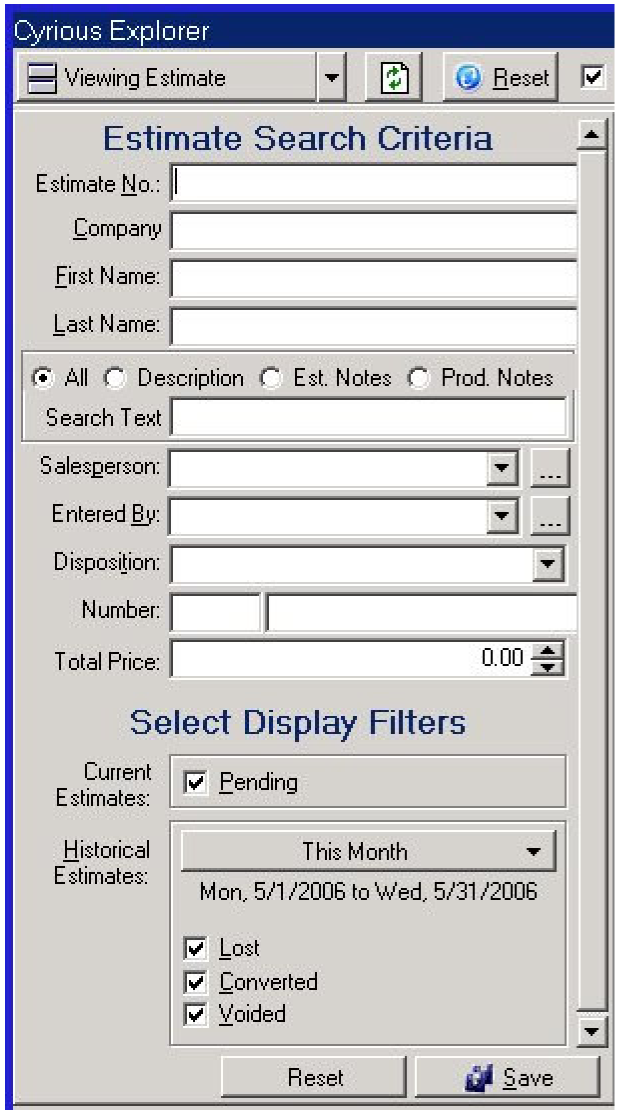


Figure 9-25 Explorer Viewing Estimate Screen

Estimate No. Enter a specific estimate number. If you do not know it, you can click on the magnifying glass to search for the estimate in Explorer.

Company Expands with a few options for viewing the company and displaying reports pertinent to the company.

Names Searching for a name will search all names associated with an estimate, not just the primary contact.

Search Text Search descriptions of all line items.

Choosing a Salesperson or Enterer	Use the ellipsis box to the right of Salesperson and Entered By to reveal an organizational structure containing employees.
Disposition	Search according to the type of order.
Number	Search by company/contact phone number.
Total Price	Search by entering the total price of the order.
Pending	Select this button to expand your search to include pending orders.
Historical Orders	Click on this button to select a date range for your search
Converted	Includes estimates that have been converted into orders
Voided	Includes estimates that have been cancelled

RIGHT CLICK OPTIONS

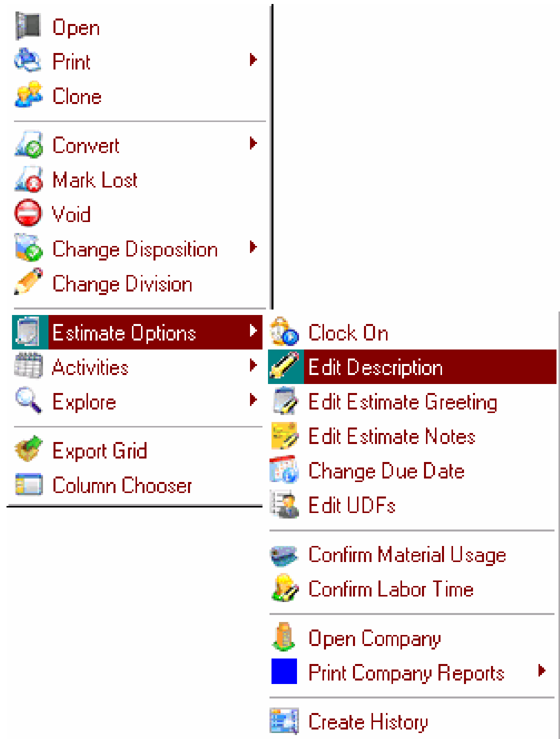


Figure 9-26 Explorer View Estimate Right Click Options

Open	Open a record.
Print	Prints the selected order, estimate, company, etc.
Clone	Copies a pre-existing order, estimate, or product to a new record.
Convert	Convert the estimate to an order or service ticket.
Mark Lost	Mark the estimate as lost/not applicable.
Void	Cancels a pre-existing order.
Change Disposition	Changes the type of estimate.
Change Division	A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.
Estimate Options	Opens a list of options for your customization.
Activities	Expands to create an email, note, call, appointment, meeting, to do, or work assignment.
Explore	Expands to select the kind of Explorer window you want to open. It will open in a separate window.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

VIEW COMPANY

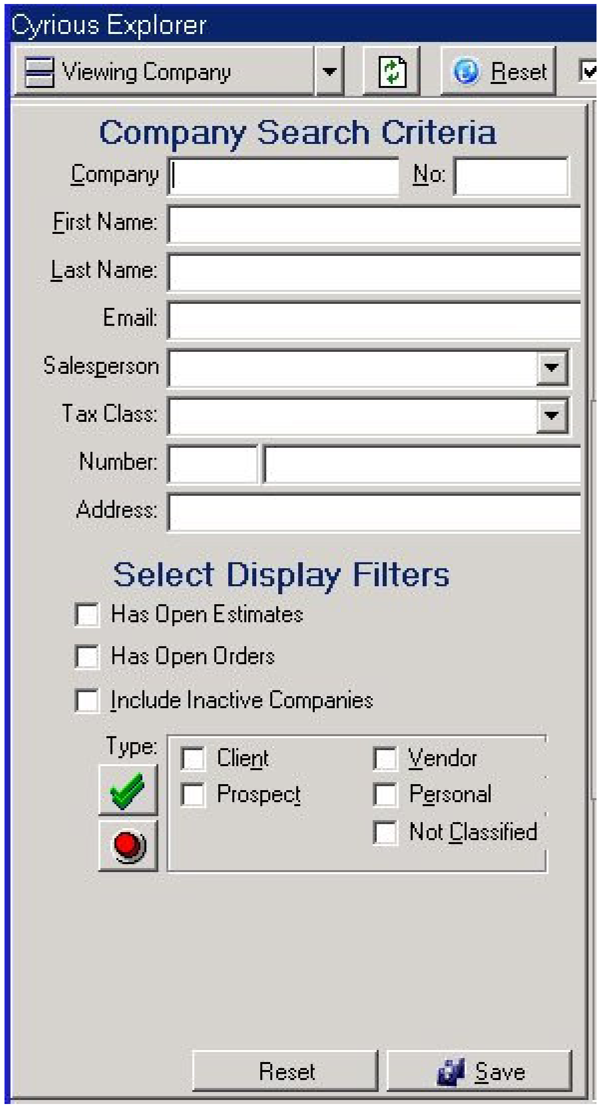


Figure 9-27 Explorer Viewing Company Screen

Company	Expands with a few options for viewing the company and displaying reports relevant to that company.
No.	Search by company number (automatically assigned by Control).
Names	Searching for a name will search all names associated with an estimate, not just the primary contact.
Email	Search by contact's email address.
Salesperson	Search by salesperson assigned as primary to that company.
Tax Class	Select the default tax class for this group. You can select from city, county and state tax classes.
Number	Search by contact phone number.

Address	Enter in the group's address.
Display Filters	
Has Open Estimates	Searches open estimates
Has Open Orders	Searches open orders
Include Inactive Companies	Expand your search to include inactive companies
Client/Prospect	Filter between current customers and potential customers
Vendor/Personal/Not Classified	Filter the type of company classifications available.

RIGHT CLICK OPTIONS

Figure 9-28 View Company Right Click Options

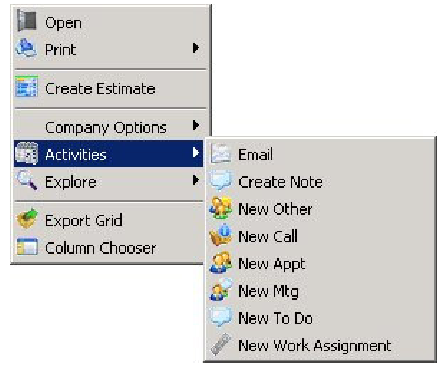


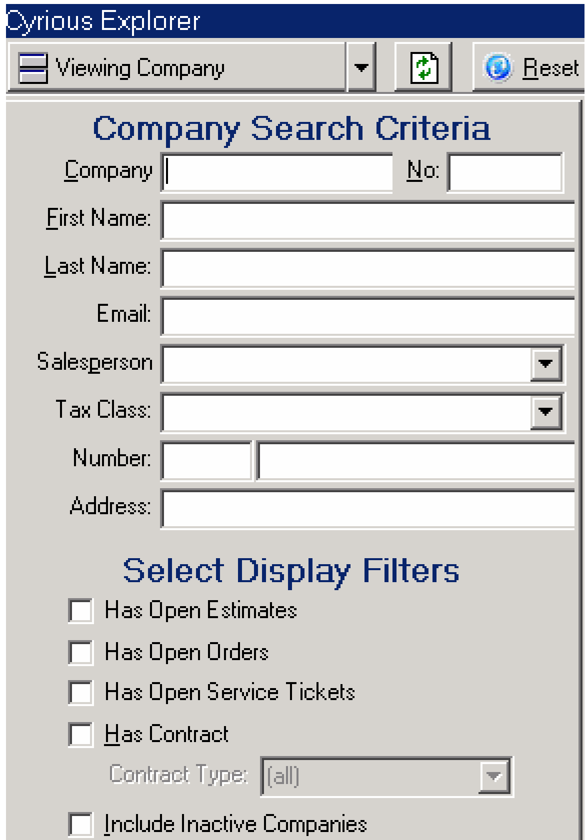
Figure 9-29 View Company Activities Sub Menu

Open	Open a record.
Print	Prints the selected order, estimate, company, etc.
Create Estimate	Opens a window to create a new estimate.
Company Options	Opens a list of options for your customization.
Activities	Expands to create an email, note, call, appointment, meeting, to do, or work assignment.
Explore	Expands to select the kind of Explorer window you want to open. It will open in a separate window.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

VIEW CONTACT

Figure 9-30 Explorer Viewing Contact Screen

This type of search is similar to the company search function.


Cyrious Explorer
Viewing Company
Reset
Company Search Criteria
Company
No:
First Name:
Last Name:
Email:
Salesperson
Tax Class:
Number:
Address:
Select Display Filters
Has Open Estimates
Has Open Orders
Has Open Service Tickets
Has Contract
Contract Type:
(all)
Include Inactive Companies

RIGHT CLICK OPTIONS

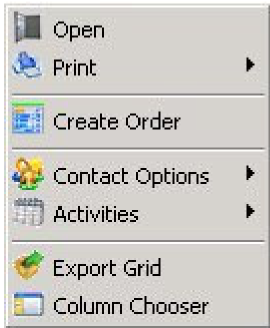


Figure 9-31 View Contact Right Click Options

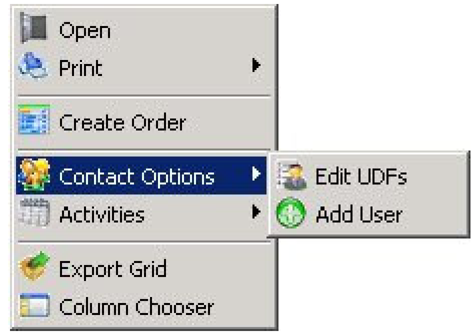


Figure 9-32 View Contact - Contact Options Sub Menu

Open	Open a record.
Print	Prints the selected order, estimate, company, etc.
Create Order	Creates a new order.
Contact Options	Expands to provide the option to Edit UDFs or add another user.
Activities	Expands to create an email, note, call, appointment, meeting, to do, or work assignment.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

VIEW TEMPLATE--CAN'T FIND IN SOFTWARE

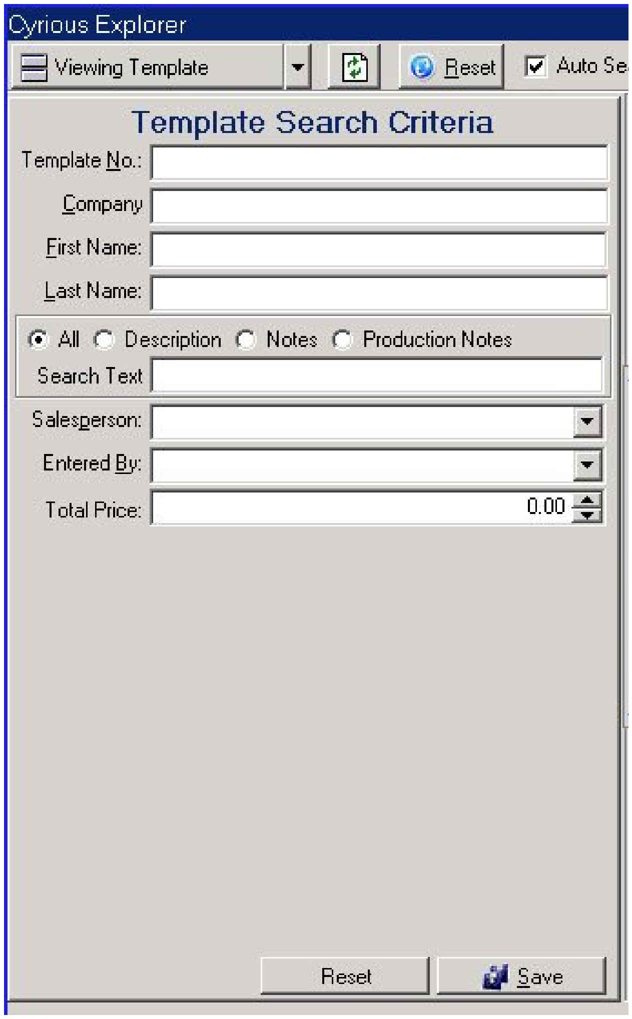


Figure 9-33 Explorer Viewing Template Screen

Template No.	Enter the number of the template.
Company	Expands with a few options for viewing the company and displaying reports pertinent to the company.
Names	Searching for a name will search all names associated with an estimate, not just the primary contact.
Search Text	Search the descriptions of all line items.
Salesperson	Check this box to assign salesperson status.
Entered By	Displays the name of the employee who entered the record. This cannot be changed.
Division	A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.
Total Price	Enter the amount or use the arrows to select a price in increments of one for your search.

RIGHT CLICK OPTIONS

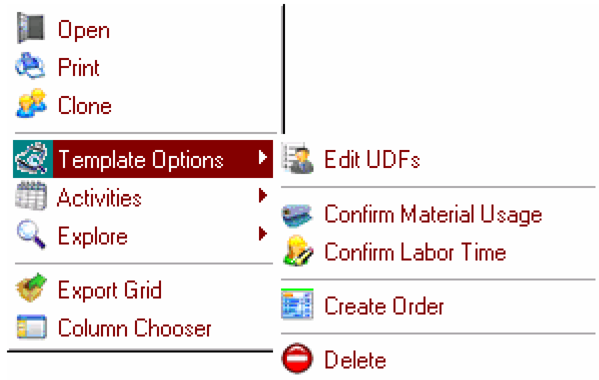


Figure 9-34 Viewing Template Right Click Options

Open	Open a record.
Print	Prints the selected order, estimate, company, etc.
Clone	Copies a pre-existing order, estimate, or product to a new record.
Template Options	Opens a list of options for your customization.
Activities	Expands to create an email, note, call, appointment, meeting, to do, or work assignment.
Explore	Expands to select the kind of Explorer window you want to open. It will open in a separate window.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

VIEW LINE ITEM

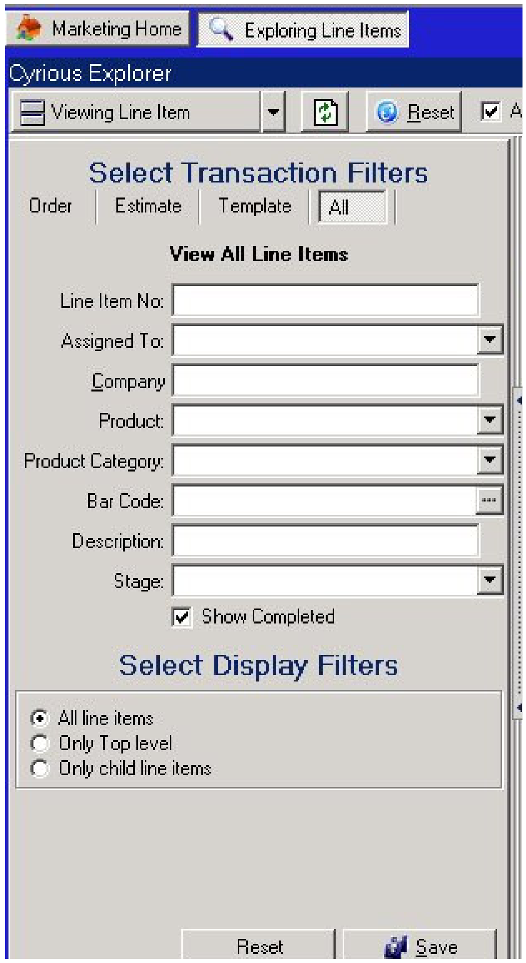


Figure 9-35 View Line Item Explorer Dialogue

Service Ticket/Template/All	Use the arrows along the top left hand of the screen to search orders, estimates, service tickets, templates, or all.
Assigned To	Use the drop down box to search by the employee to which the line is assigned.
Company	Expands with a few options for viewing the company and displaying reports pertinent to the company.
Division	A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.
Product	Use the drop down box to search by product.
Product Category	Use the drop-down box to search by product category.
Bar Code	Input the item's bar code.
Description	Search the description of the line item.

Stage	Use the drop down box to search line items in a certain stage of production.
Show Completed	Use this box to expand your search to include completed line items.
Variable Filters	Select appropriate filters for your search.
Display Filters	Select appropriate filters for your search.

Complete status is not included in the stages.

All Line Items	Searches all line items
Only Top Level	Searches only top level items
Only Child Line Items	Searches only child line items

RIGHT CLICK OPTIONS

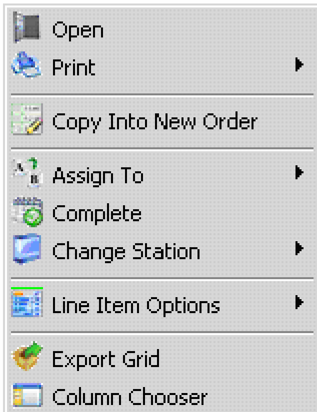


Figure 9-36 View Line Item Right Click Options

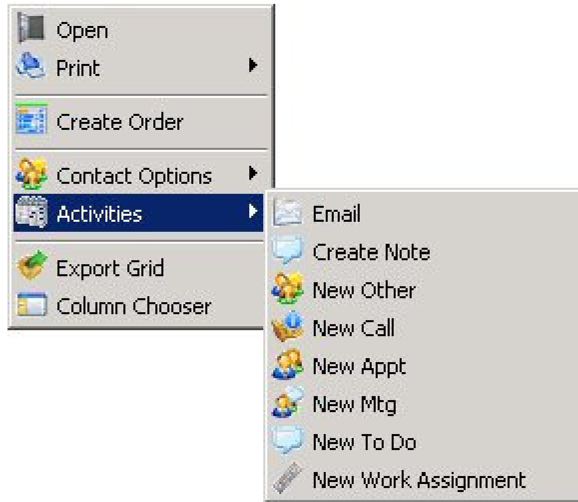


Figure 9-37 Activities Options Sub Menu

Open	Open a record.
Print	Print the selected order, estimate, company, etc.
Create Order	Opens a screen to create a new order.
Contact Options	Edit User Defined Fields and Add a User.
Activities	Create an email, note, appointments and other activities.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

VIEW ACTIVITY

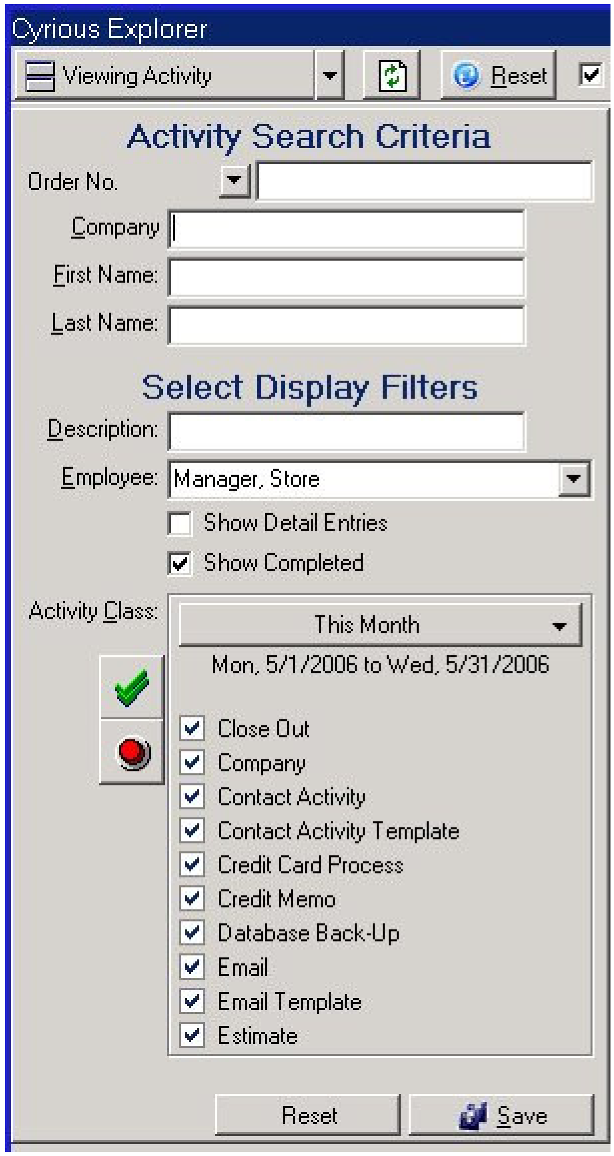


Figure 9-38 View Activity Explorer Dialogue

Order No. Enter a specific order number.

To select another option such as Estimate or Order History No., click on the down arrow to reveal the drop-down list.

Figure 9-39 Search Criteria for Explorer Activity

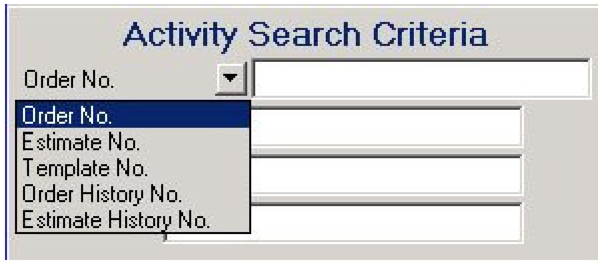


Figure 9-40 View Activity - Order No. Drop-Down List

Company	Enter Company name.
Names	Searching for a name will search all names associated with an estimate, not just the primary contact.
Display Filters	Select whichever filters you want to use.

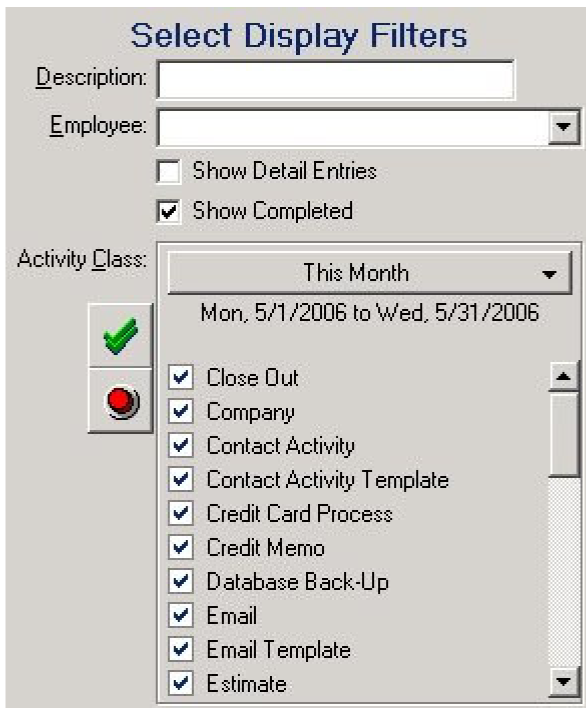


Figure 9-41 Select Display Filters Options

Description	
Employee	
Show Detail Entries	Selecting this button will show a detailed view of all highlighted results.

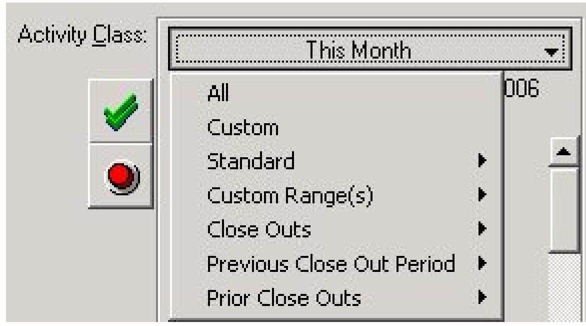


Figure 9-42 View Activity Class Drop-down Menu Options

Activity Class Select the This Month button to reveal a list of classes. You may search temporally or choose to search activities by their close out classification.

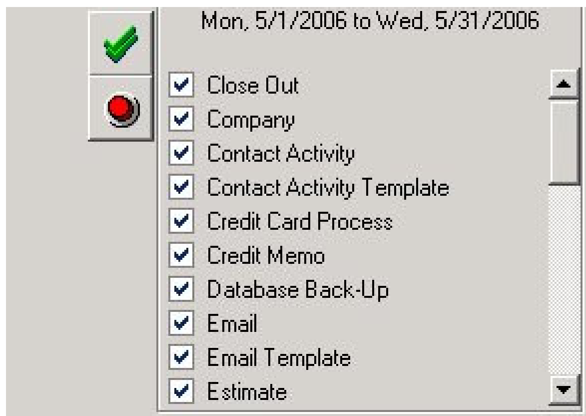
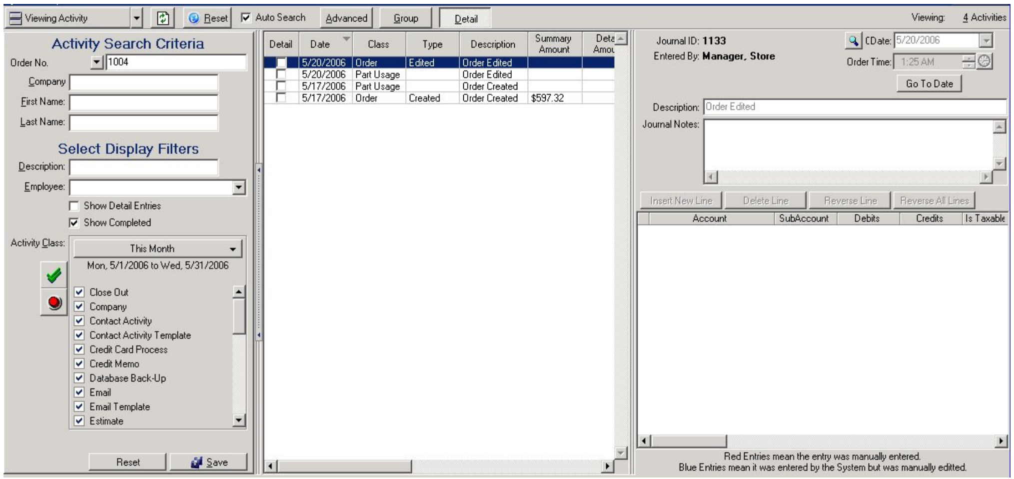


Figure 9-43 Activity Checkboxes with Execute & Cancel Buttons

Activity Check Boxes Select the activities you wish to view by clicking on their box, or view all by selecting the green arrow. To cancel selected activities, click on the red circle.

Figure 9-44 Viewing Orders for Selected Activity Screen



Detail	Date	Class	Type	Description	Summary Amount
	5/20/2006	Order	Edited	Order Edited	
	5/20/2006	Part Usage		Order Edited	
	5/17/2006	Part Usage		Order Created	
	5/17/2006	Order	Created	Order Created	$597.32

Figure 9-45 Activity Results Screen with Detail Selected

RIGHT CLICK OPTIONS

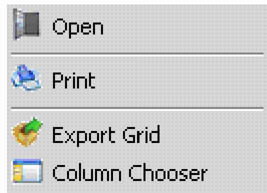


Figure 9-46 Explorer Activity Right Click Menu Options

Figure 9-47 Print Company Reports Sub Menu Options

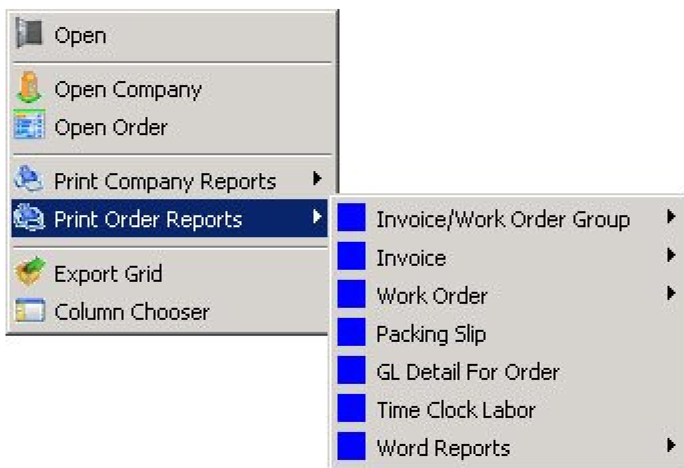


Figure 9-48 Print Order Reports Sub Menu Options

Open	Opens Journal screen for that record to allow notes and account details to be entered. Click here for more information Journal Screen.

Figure 9-49 Open Command – Journal: Order: Order Edited Screen

Open Company	Opens the Company screen for that item in a new window.
Open Order	Opens the Order Screen for that item in a new window.
Print Company Reports	Prints the selected order, estimate, company, etc.

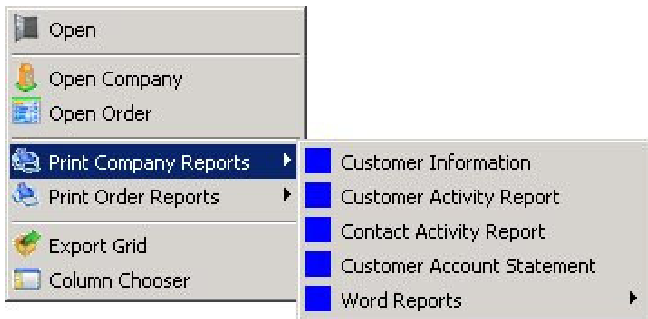


Figure 9-50 Print Company Reports Sub Menu Options

Print Order Reports	Prints the selected order, estimate, company, etc.

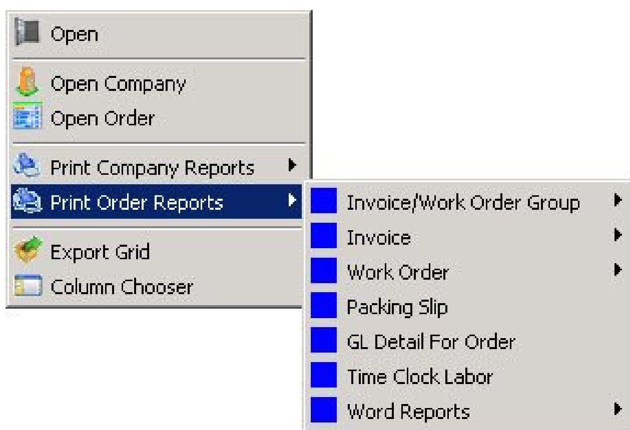


Figure 9-51 Print Order Reports Sub Menu Options

Export Grid	Creates a file that you can export to another program such as Microsoft Excel. See section on Export Grid.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize. See section on Column Chooser.

VIEW ORDER IN HISTORY

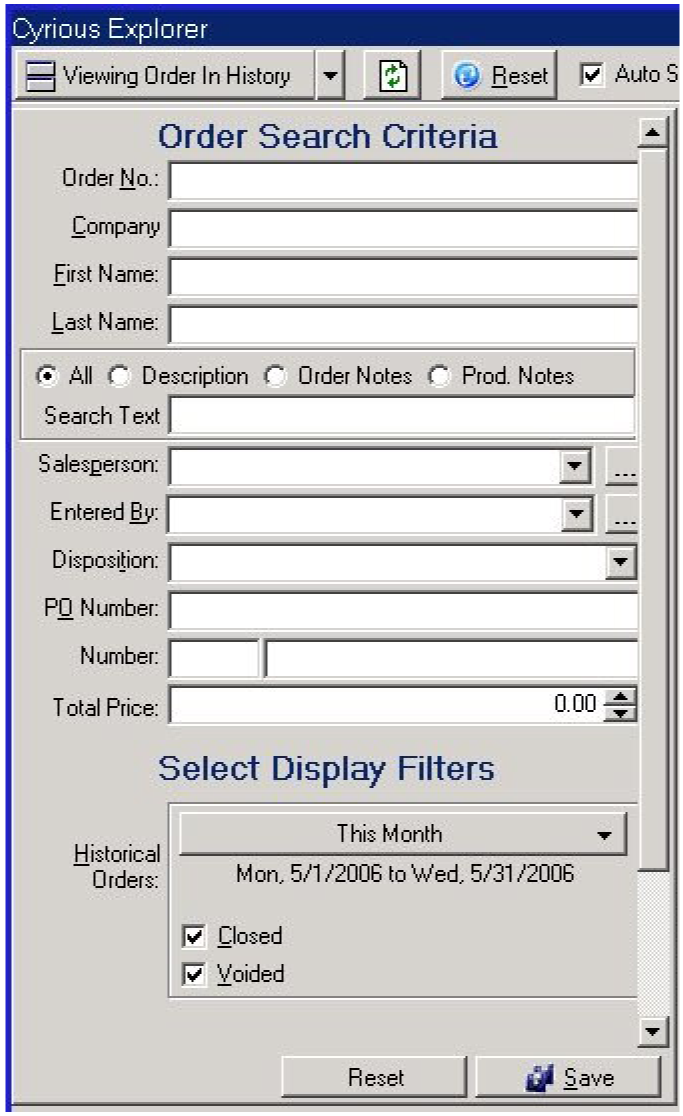


Figure 9-52 Explorer - View Order in History Screen

Order No.	Enter a specific order number. If you do not know it, you can click on the magnifying glass to search for the order in Explorer.
Names	Searching for a name will search all names associated with an estimate, not just the primary contact.
Search Text	Search the descriptions of all line items.
Salesperson	Check this box to assign salesperson status.
Disposition	Search according to order type.
P.O. Number	Search by Purchase Order Number.
Number	Search by contact's phone number.

Division A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.

Total Price Search by the order's total price.

Historical Orders The historical orders filter will search both temporal records sorted by a general period or by closeout dates. Select This Month to narrow down dates. Click on this button to select a date range for your search.

Figure 9-53 Historical Orders Pop-up Menu Options

Closed Expand your search to include closed orders.

Voided Expand your search to include voiced/cancelled orders.

You can broaden your search to include closed and voided orders by selecting those buttons **prior** to selecting the Historical Orders pop-up menu.

VIEW ESTIMATE IN HISTORY

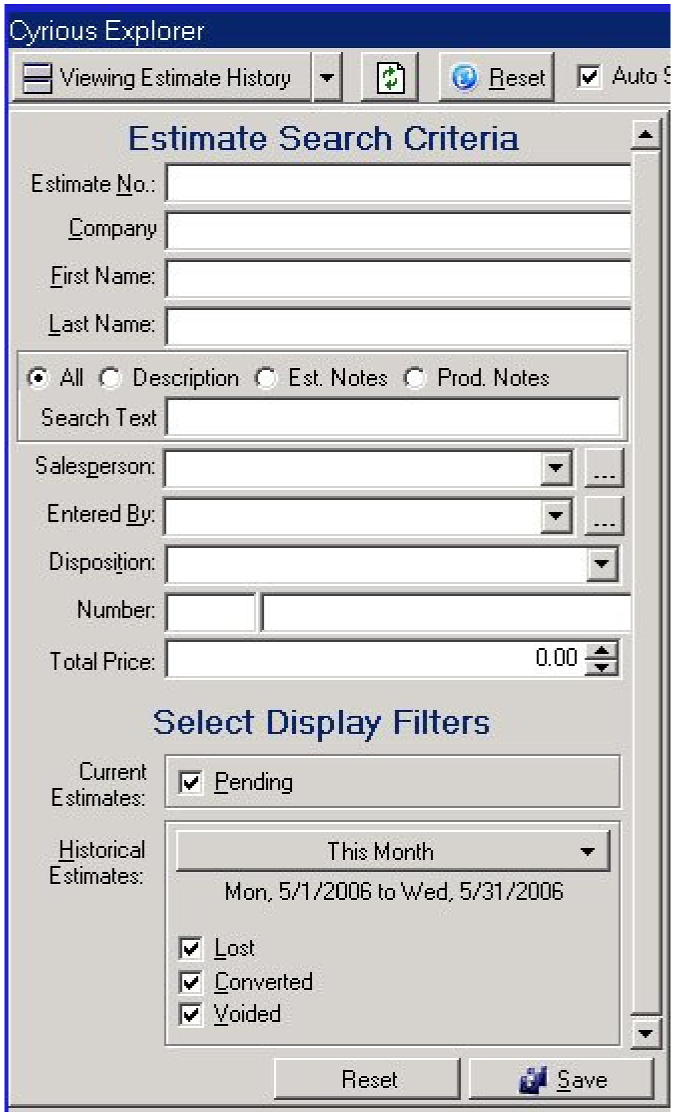


Figure 9-54 Explorer Estimate in History Screen

This search is similar to the Order in History screen.

CREATE HISTORY

Move orders to histories using custom criteria.

Tools | Create Histories

Figure 9-55 Tools Menu - Create History Command

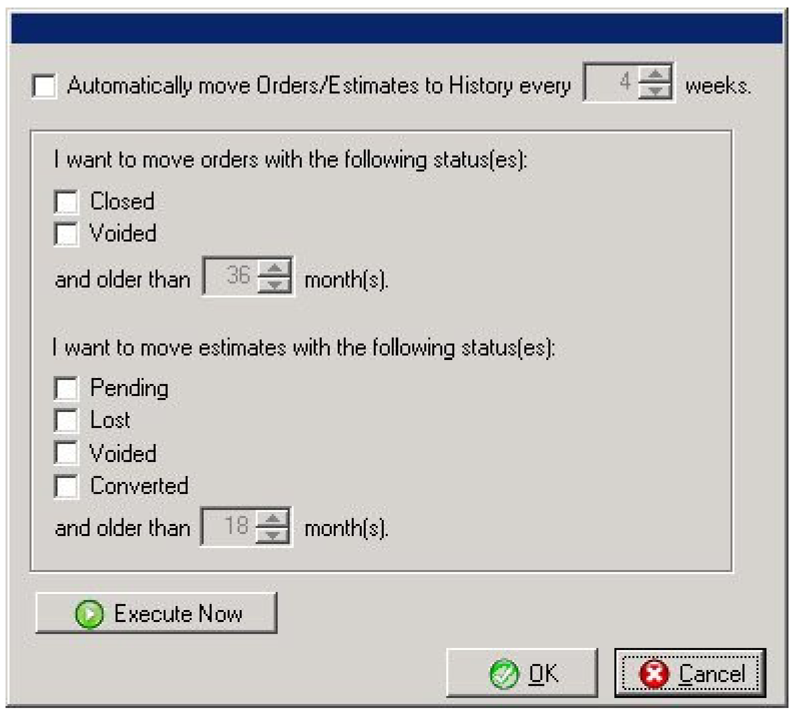


Figure 9-56 Create History Dialog Box

Made up of checkbox options, this dialog box allows you to select/deselect options for moving Orders and Estimates to History.

Automatically	Move Orders/Estimates to History every few weeks - default is set to four but not checked.
Order Status	Closed, Voided and older Orders - default is set to 36 months but not checked.
Estimate Status	Pending, Lost, Voided, Converted and Older Estimates - default is set to 18 months but not checked.

Figure 9-57 Create Orders in History Closed & Older than 36 Months Selected

Figure 9-58 Execute Now Selection Button

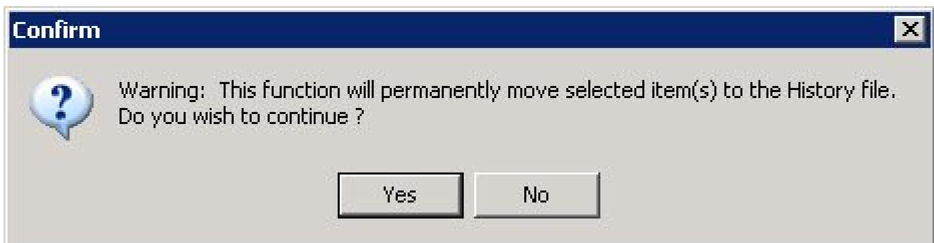


Figure 9-59 Move Orders to History - Confirmation Dialog Box.

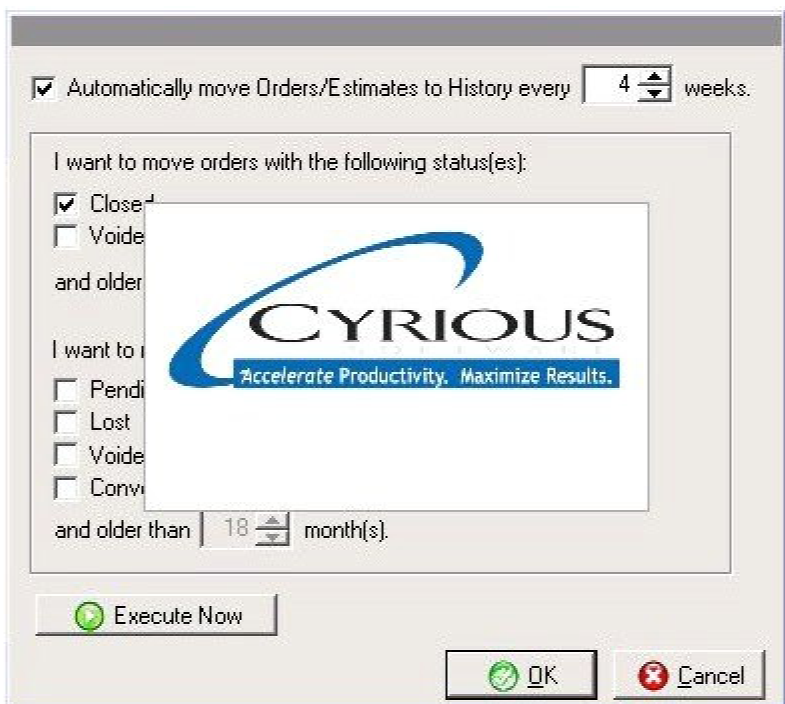


Figure 9-60Moving Closed Order in to History Screen

RIGHT CLICK OPTIONS

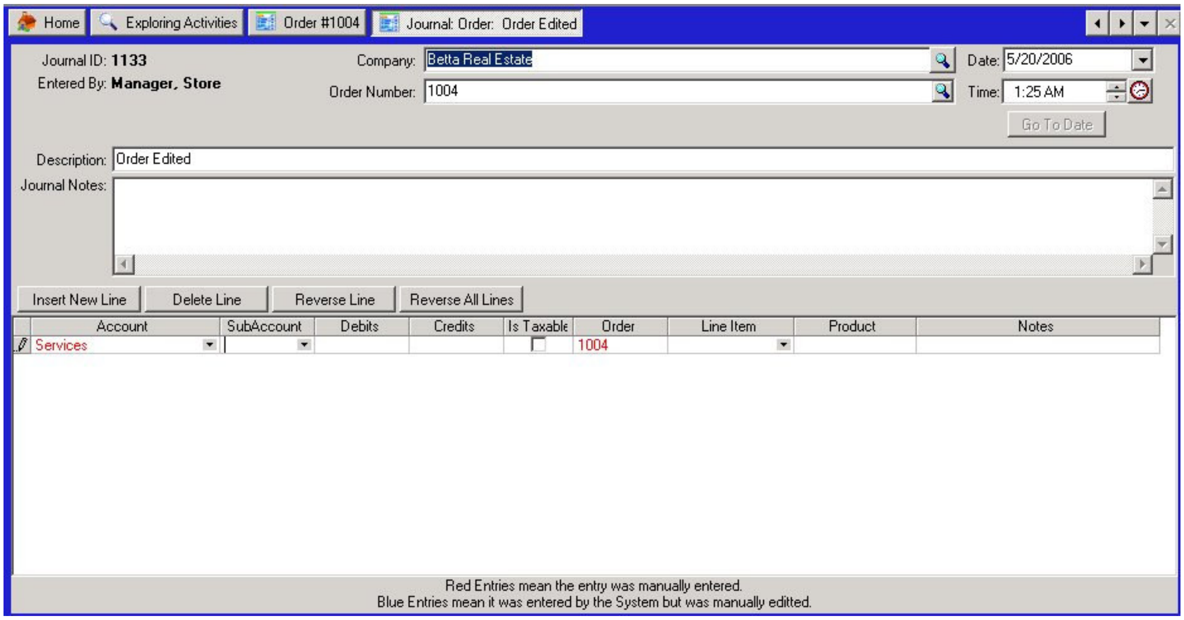
Figure 9-61 Orders In History – Right-click Menu Options

Export Grid Creates a file that you can export to another program such as Microsoft Excel.

Column Chooser Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

For more detailed information on Column Chooser click here

JOURNAL


Home
Exploring Activities
Order #1004
Journal: Order: Order Edited
Journal ID: 1133
Entered By: Manager, Store
Company: Betta Real Estate
Order Number: 1004
Date: 5/20/2006
Time: 1:25 AM
Go To Date
Description: Order Edited
Journal Notes:
Insert New Line
Delete Line
Reverse Line
Reverse All Lines
Account
SubAccount
Debits
Credits
Is Taxable
Order
Line Item
Product
Notes
Services
1004
Red Entries mean the entry was manually entered.
Blue Entries mean it was entered by the System but was manually editted.

ADVANCED CRITERIA SCREEN

Explorer | Advanced Criteria Button

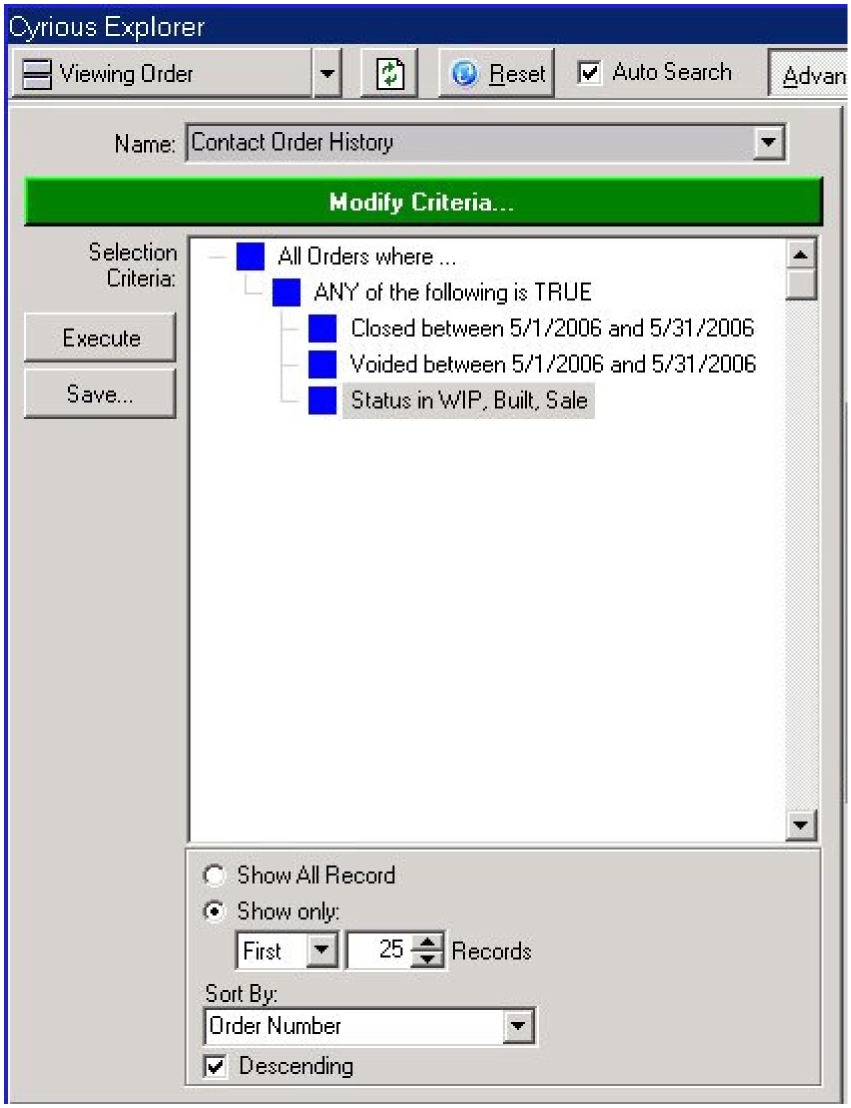


Figure 9-62 Explorer Viewing Order - Advanced Criteria Screen

Name	Use the drop-down box to select previous queries.
Modify Criteria	Modify your search.
Selection Criteria	Specify what criteria to use for your search.
Execute	After creating a query, select execute to activate that search.
Save	Saves all entered information. It will be available for selection from the Name drop-down box.

Show All Records	You have the option to view all results from a query or further sort them into a number of desired orders. Select Show All Records to view all results.
Show Only	Select this box to sort the results even further. Choose your criteria from the Sort By drop-down box.
Sort By	Use the drop-down box to select a criterion to sort your results.

MODIFY CRITERIA SUB SCREEN

Click the green Modify Criteria button on the upper left-hand side of the screen. The New Query screen will appear.

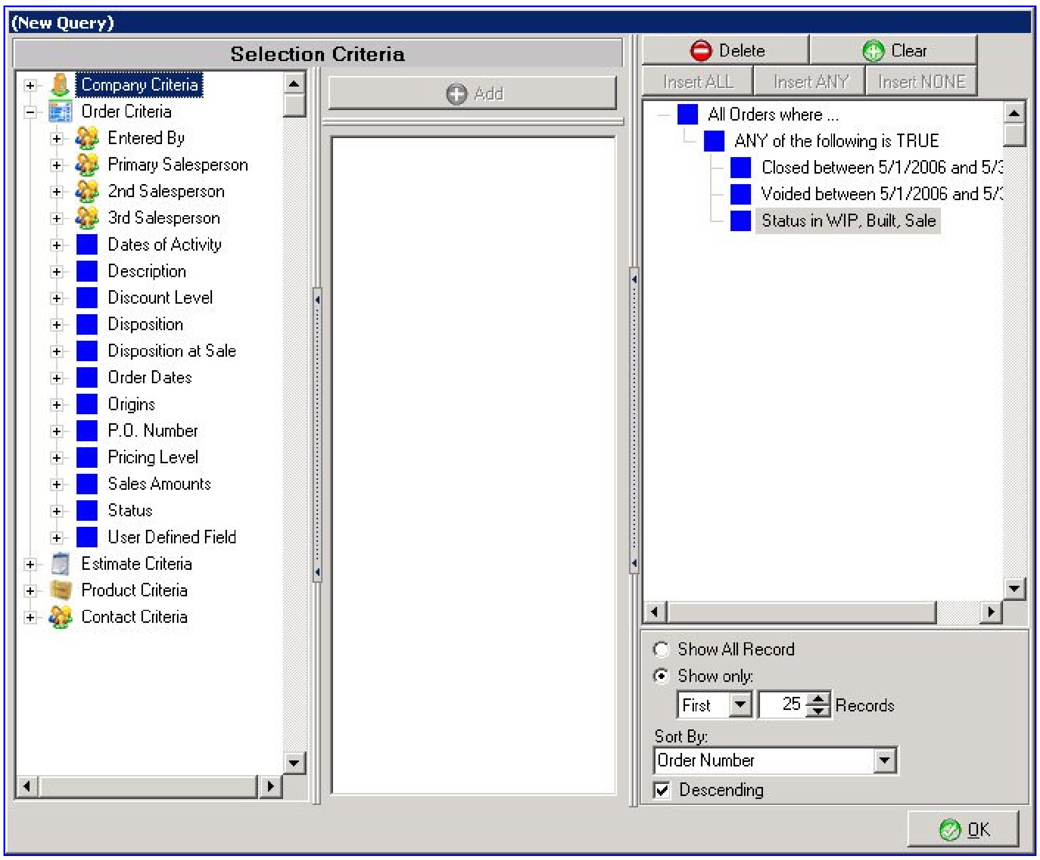


Figure 9-63 Explorer Viewing Order - Advanced Criteria Screen

Use the hierarchical structure on the left side of that screen to select the criteria you would like to use. At the bottom portion of this screen are further options to limit your search to a manageable number, as well as an option to sort your results by alternate criteria.

Use the drop-down box to select a sorting option.

VIEW SERVICE TICKET

Description of service ticket and when it would be used …

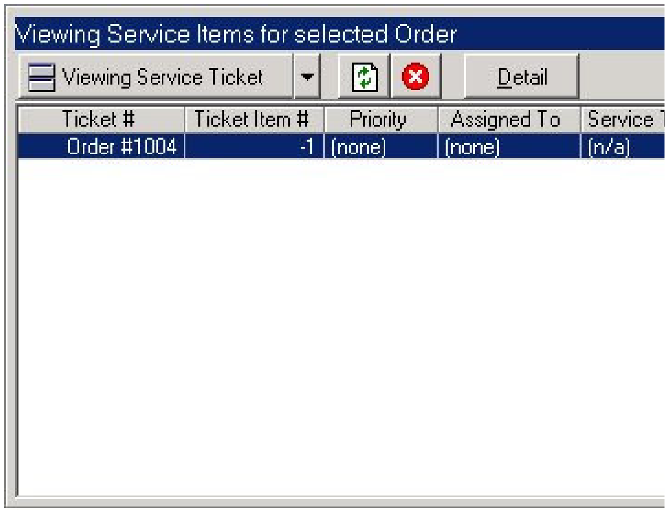


Figure 9-64 Explorer Viewing Service Ticket Screen

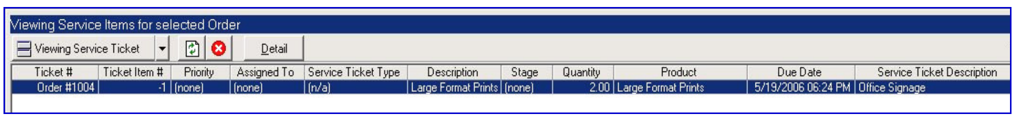


Figure 9-65 Service Ticket Details

Ticket No. Enter a specific service ticket number. If you do not know it, you can click on the magnifying glass to search for the estimate in Explorer.

Ticket Item #

Priority

Assigned To Search for service tickets assigned to a specific person.

Service Ticket Type

Description Search descriptions of all line items.

Stage Search according to the phase of development the service ticket is in.

Quantity

Product Search by the product to which the service ticket corresponds.

Due Date

Service Ticket Description

WIP Includes works in progress

Built Includes service tickets that are partially completed

Sale Includes service tickets that are complete but require additional payments (perhaps those with payment plans)

Closed Includes service tickets that require no further action

Voided Includes service tickets that have been cancelled

All Line Items Searches all line items

Only Top Level Searches only top level line items

Only Child Line Items Searches only child line items

RIGHT CLICK OPTIONS

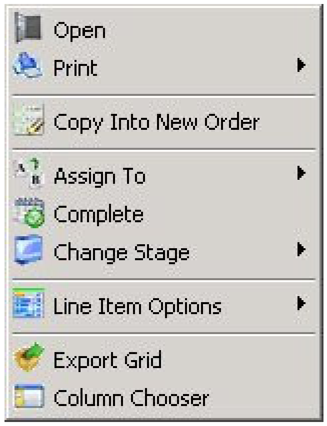


Figure 9-66 View Service Ticket Right Click Options

Figure 9-67 View Service Ticket Assign To Sub Menu Options

Open	Open a record.
Print	Prints the selected order, estimate, company, etc.
Copy Into New Order	Opens a screen to create a new order.
Assign To	Expands to show a list of employee names. Select the employee you want assigned to this item.
Complete	Mark the service ticket complete.
Change Stage	Change the phase the service ticket is in.
Line Item Options	Expands to show a list of functions you can perform that are pertinent to the item. Clock an employee onto that job; view the company, product, pricing, and product layout.
Export Grid	Creates a file that you can export to another program such as Microsoft Excel.
Column Chooser	Opens a pop up box with a checklist of columns you can view in this box. Cyrious saves all your settings for each screen you customize.

SUB EXPLORER VIEW

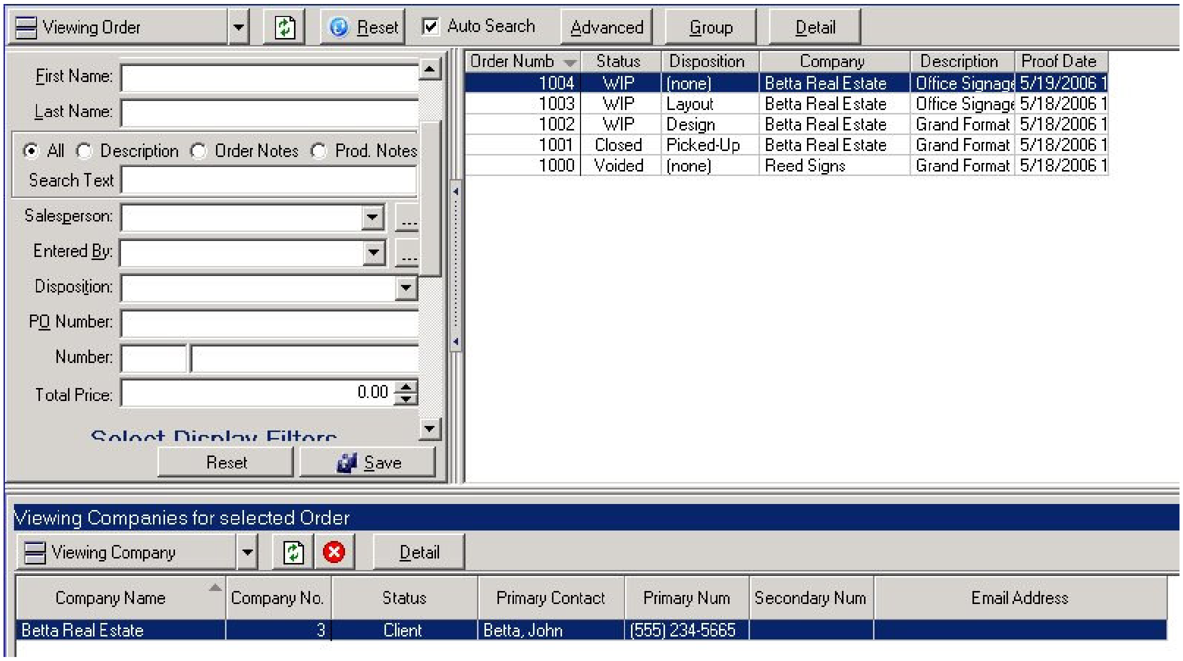


Figure 9-68 Explorer Viewing Orders with Sub Explorer Viewing Company Details

Use the sub Explorer view at the bottom of the window to view a set of records associated with the search results Explorer has displayed in the main search grid.

Figure 9-69 Detail of the Sub Explorer Panel

For example, if you are viewing an order and wish to view the company associated with it, choose to view the company sub screen. Here, the company's information appears at the same time as the order. All Right Click Options work the same in the sub Explorer.

A Tip for Using Sub Explorer View

Most of us here at Cyrious use the sub Explorer view almost 100% of the time we are using the software. We like to see which company an order corresponds to, or who is calling about a service ticket.

Because having to toggle on the sub Explorer view every time you logged in to Control would be tiresome, we added a button near the top tool bar that we hope would help you as much as it helps us.

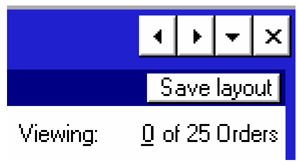


Figure 9-70 Explorer Save Layout Button

Say you have selected View Companies in your main Explorer Screen. In your sub Explorer view, you have selected View Orders. Click the Save Layout button in the top right corner of the Explorer window to save this view.

Now, every time you view companies in your main Explorer window, the orders sub Explorer view will automatically pop up.

You can save a layout type for every main Explorer view.

EFFECTIVE USE

You will need to use Explorer any time you need to view a record from in your system. Even if you know every detail about, say, an order, you will still need to use Explorer to type in at least the order number to pull up the record for that.

Explorer is also useful when you do not have all complete details about something.

For example, if a customer send in a check, but does not specify an order number on the check memo, you can View Companies in the main Explorer window, find that company by typing in the address, then pull all their open orders in the sub Explorer view to locate the order for which they have sent in the check.

Getting to know Explorer is a skill that the majority of our Users pick up quickly. Once you have given it a little bit of time, navigating the system is no more difficult than scooping ice cream or riding a bicycle.

10 : COMPANIES

CONCEPT

Managing your current and potential clients begins with entering a client's contact information in the New Company screen. Here you can compile a list of all clients, their preferred contacts, billing and shipping addresses, general financial information, and any other User-Defined Fields you wish to include. The compiled information about companies is accessible throughout Control, when entering in estimates, orders, payment entry, and scheduling activities. You may also look research companies with Explorer.

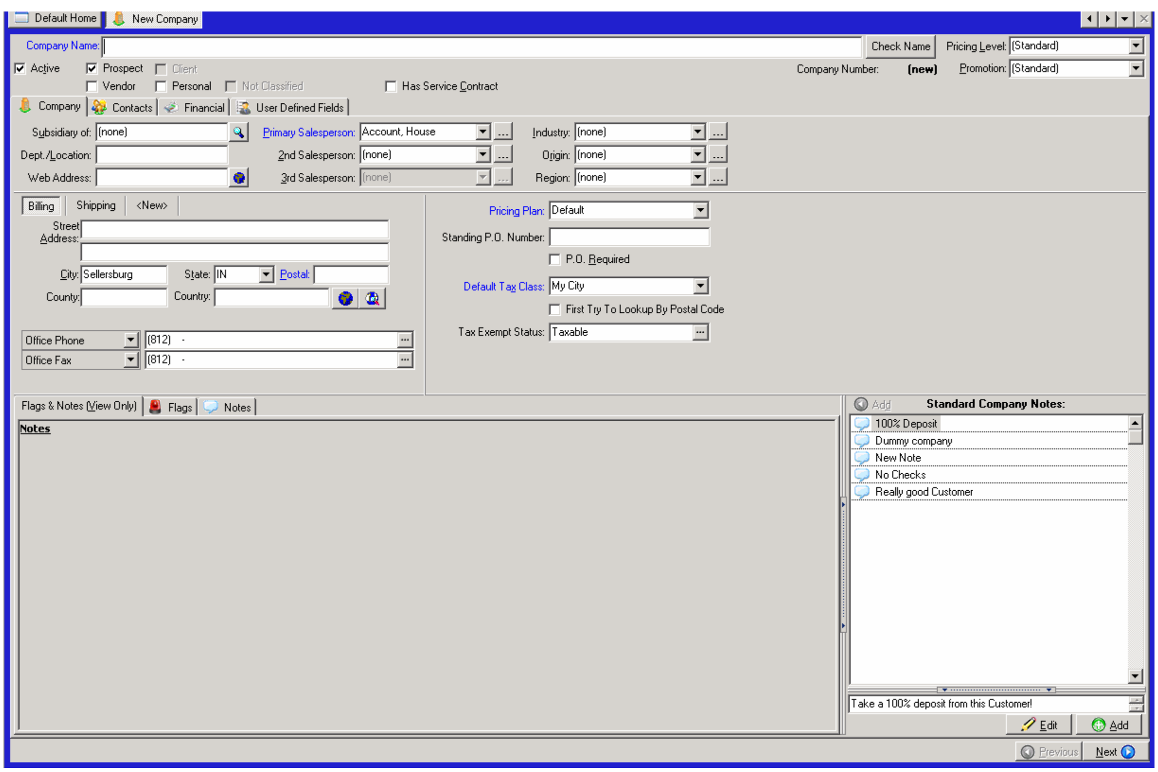
WHAT ARE COMPANIES?

A company is any prospective or current client, active or inactive. Companies may be individual people or corporations. Active companies are those who are currently using services. You may also save a potential or previous client's information by classifying it as inactive. Doing so will retain that company's information while excluding that company from the ordering process and activities.

NEW COMPANY SCREEN

Main Toolbar | New Company

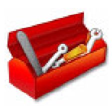
Main Menu | New | New Company



New Company Screen

- General contact information
- General financial information
- Internal notes about the company
- Personal information about their contacts
- Identify which of your employees are associated with individual contacts from that company
- Set up service contracts
- Set custom User-Defined Fields

Company Name – Type in the company's name.



The **Check Name** box to the immediate right of the name field prevents duplicates among company names. Control will not allow you to store two companies with the exact same name.

Active – Active companies can place orders. Their activities will appear in order, estimate, and service ticket entry screens. Inactive companies cannot place orders, nor can they have activities assigned, therefore, they do not show up in those screens. Inactive companies only show up when you search Explorer for inactive companies.

Pricing Level/Promotion – Select the company pricing level from the drop-down box. Pricing levels may be set to a higher or lower percentage of the base price. Pricing levels allow you to charge a certain rate for individual companies. This information is concealed from your salespersons and your company.

Primary Salesperson – Assign up to three salespersons in this section.

Set up salespersons.

Main Menu | Setup | Option Setup | Company Options

Industry, Origin, and Region – Drop-down boxes with common selections. To add your own selections, select the **New** option from the drop-down box to reveal an entry screen.

Billing and Shipping Addresses – Once you have entered a billing address, it will be the shipping address unless you enter a new shipping address. To enter an additional shipping address, select the New button.

You also have the option to ship to the billing address by selecting the **Use Company Billing Address** button. This will appear once you have entered the billing address.

The **Mapquest** button provides a street map and driving directions to the address.

Telephone numbers – You must enter in an office contact number to save the company's information.

Flags and Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup. Flags pop up when you open and edit a company's order screen.

To enter flags and notes, simply type in your desired notes or select from the speed notes section. You can also use the Add button to create flags and notes using merged fields.

Speed Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup. Speed notes save time by listing several common notes from which you can choose, rather than creating your own text. To add a Speed Note into the flags or notes box, either double click on that note, or highlight it with a single click and select the Add button.

Pricing Plans – Select a previously specified pricing plan. Use the drop down box to make your selection.

Create pricing plans.

Main Menu | Setup | Pricing Setup | Pricing Plans

P.O. Required – Some companies require purchase order numbers for their internal verification purposes. When this box is checked, this tells Control that this field must have a value in order to save an order for this company.

Tax Class – Select the default tax class for this group. You can select from city, county and state tax classes.

The OV (override) button will appear checked off when the tax class for that address does not match the default tax class.

Tax Number/Exemption – These classifications will apply to all the company's transactions.

Division – A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.

Set up divisions.

Main Menu | Setup | Options Setup | Misc. Options

SPECIAL ACTIONS TOOLBAR FUNCTIONS

Figure 10-1 New Company Screen Actions Menu Right Click Options

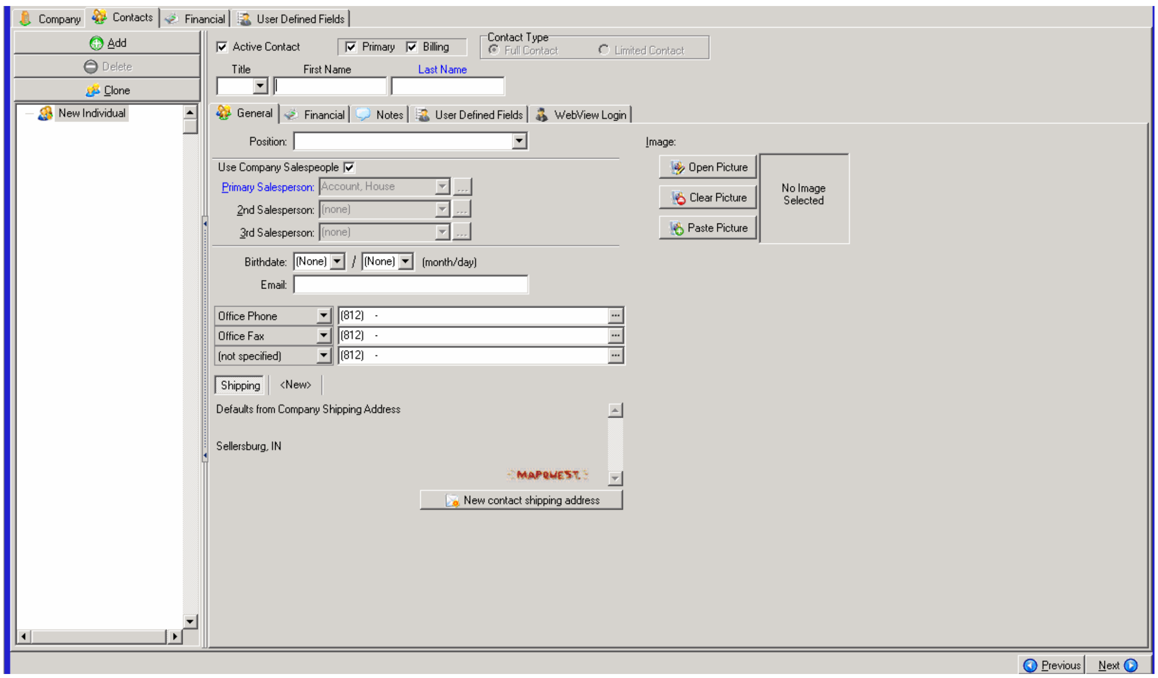
Export – Exports the displayed information for use in another program.

Save – Saves all entered information.

Cancel – Disregards changes and additions made to a record.

CONTACTS TAB

Access New Company Screen | Contacts Tab



New Company Screen Contacts Tab

For each company, you may specify one primary contact and as many other contacts necessary. Under the list of contacts to the left of the screen, a red star denotes the primary contact.

You can enter specific information about the company here. For instance, the contact ordering the product may be located right down the street from your shop, but their accountant is located at their franchise headquarters in Sacramento.

Add – Press to add a new contact to this company's record.

Delete – Removes an estimate or product from the database.

Clone – Copies a pre-existing order, estimate, or product to a new record.

Active Contact – This option is available after you have entered a company name. Designates the contact as active. Inactive contacts will not appear in order screens, but they will appear in that company's record until you manually delete them from this screen.

Primary – The primary contact is the default contact to appear on new orders and estimates.

Billing – Main person to contact for invoicing and payment purposes.

Position – Enter this person's position at the company.

Email – The contact's email address.

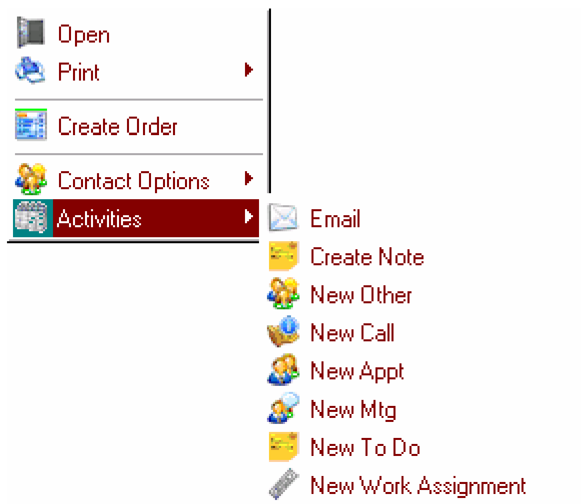
Birth date – The contact's birth month and day. Some companies like to send top customers birthday cakes or cards.

Use Company Salespeople – Check this box to use the default salespersons you have designated for this company.

Addresses – You can specify a shipping address and a billing address.

Phone numbers – Enter up to three phone numbers for each contact.

RIGHT CLICK OPTIONS



New Company Screen Contacts Tab Right Click Options

Open – Open a record.

Print – Prints the selected order, estimate, company, etc.

Create Order – Creates a new order.

Contact Options – Expands to provide the option to Edit UDFs or add another user.

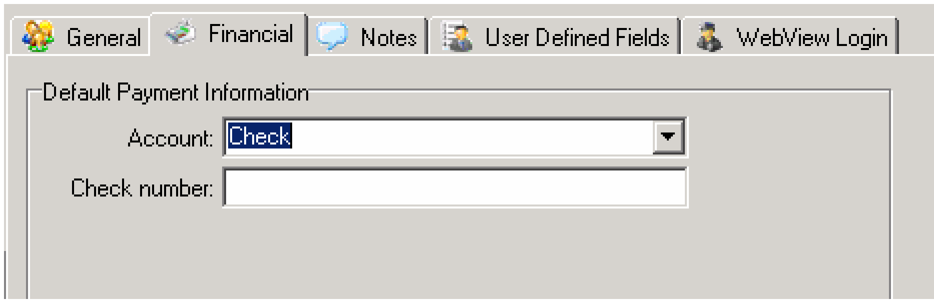
Activities – Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

FINANCIAL INFORMATION SUB SCREEN

This sub screen appears for each contact entered for a company. Each contact can have different information from the others.

Account – Designate the type of payment this contact typically uses.

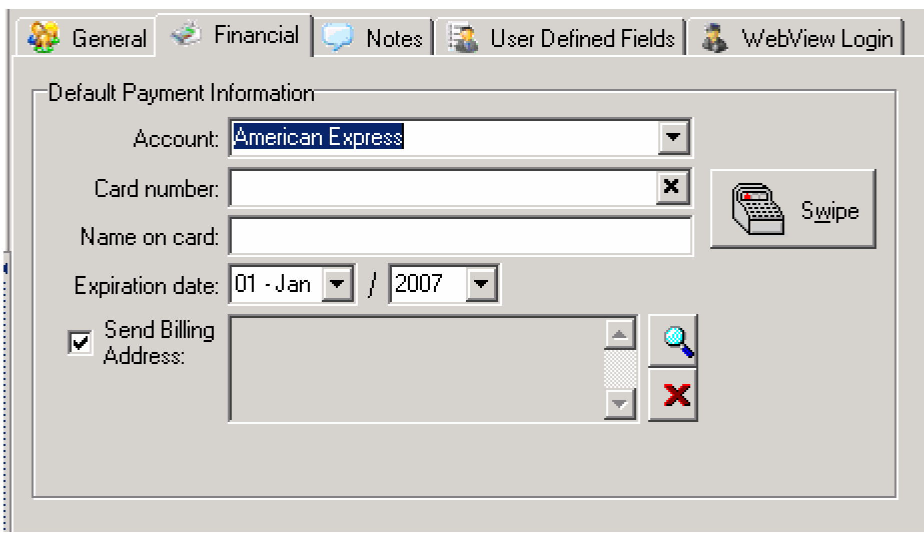
Access New Company Screen | Contacts Tab | Financial Sub Screen



New Company Screen Contacts Tab Financial Information Sub Screen

Selecting **Check** will prompt you to enter in a check number.

Selecting a credit card type will reveal a form to enter in the credit card number, expiration date, and billing address. You may alternately choose to swipe a card through your own card reader to enter the information.



Contact's Financial Tab complete with Specific Payment Information

There are also options for refunds, eChecks, wire transfers, and trade barters.

NOTES SUB SCREEN

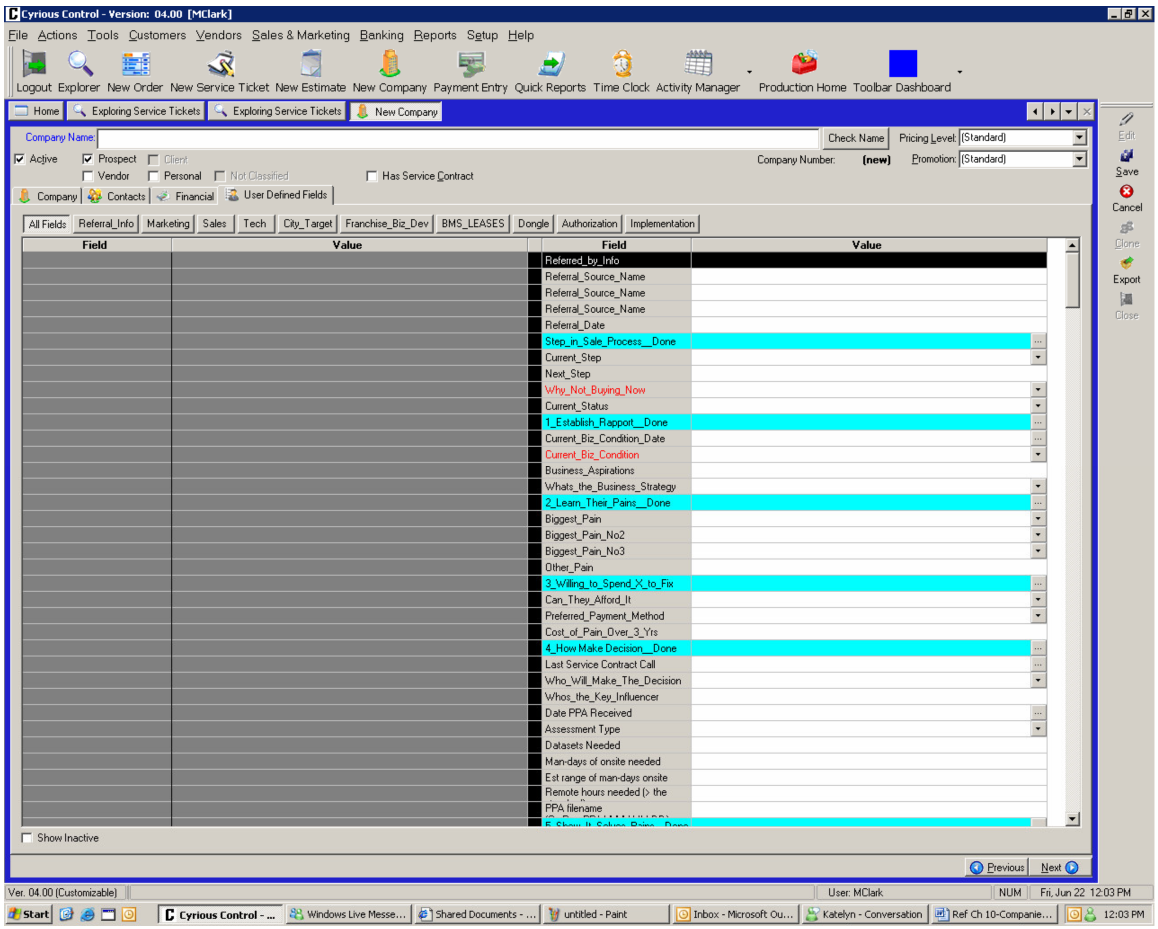
This sub screen appears for each contact entered for a company. All contacts can have different information from the others.

The Notes sub screen allows you to enter in additional information about each contact. This information remains here as a reference; it does not appear in other portions of the program.

USER-DEFINED FIELDS SUB SCREEN

This sub screen appears for each contact entered for a company. All contacts can have different information from the others.

Access New Company Screen | Contacts Tab | User-Defined Fields Sub Screen



New Company Contacts Tab User-Defined Fields Screen

You may designate certain pieces of information that you wish to know in an organized fashion for all contacts under each company.

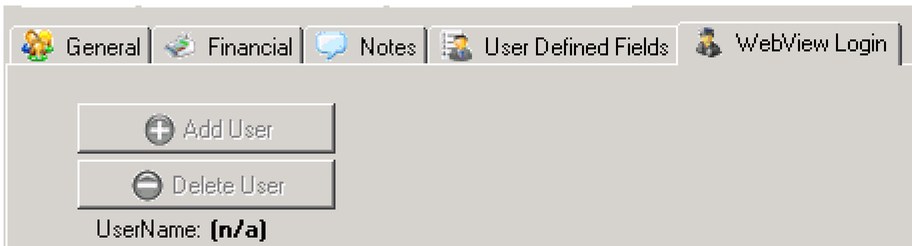
Create User-Defined Fields.

Main Menu | Options | User-Defined Fields

WEBVIEW LOGIN SUB SCREEN

This sub screen appears for each contact entered for a company. All contacts can have different information from the others.

Access New Company Screen | Contacts Tab | WebView Login Sub Screen



New Company Contacts Tab WebView Login Information Screen

If the customer uses WebView to access their orders online, this is where you will set up their IDs and passwords.

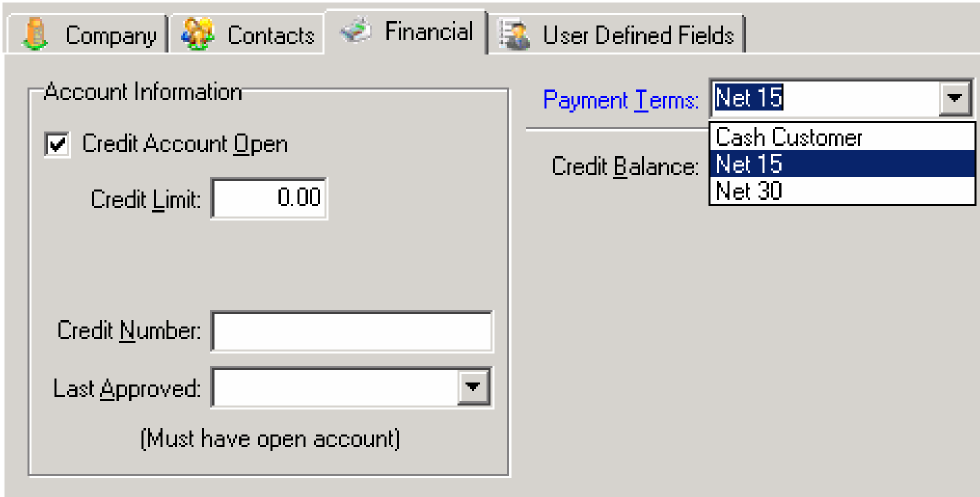
Add User – Click to create the User's WebView ID and password.

Delete User – Click to deactivate the User's WebView access.

Once you have created a WebView ID for this contact, their username will show on this screen.

FINANCIAL TAB

Access New Company Screen | Financial Tab



New Company Financial Tab

Credit Account Open – Activate credit limit fields.

Credit Limit – Specify the company's credit limit. This amount will appear during a transaction if the pre-determined amount is exceeded.

Credit Number – Create one for your company's specific credit authorization information.

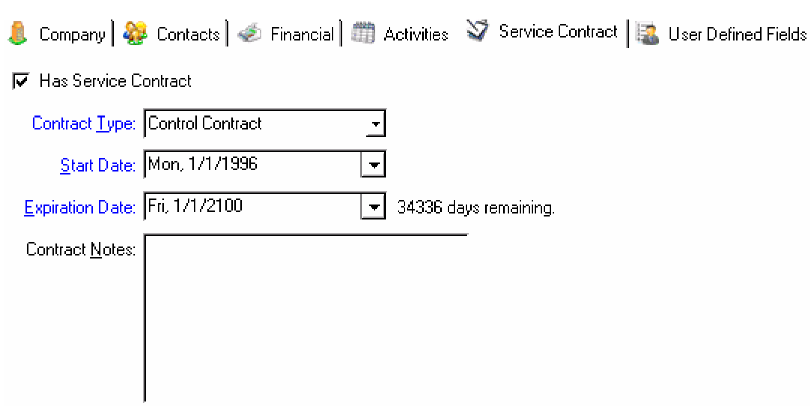
Last Approved – Enter a date in this box per your company's procedure.

Payment Terms – If a credit account is set up, you must also specify payment terms. The drop down box provides options for cash and Net 30-90 plans.

Credit Balance – The amount the customer has available to spend.

SERVICE CONTRACT TAB

Access New Company Screen | Service Contract Tab



New Company Service Contract Tab

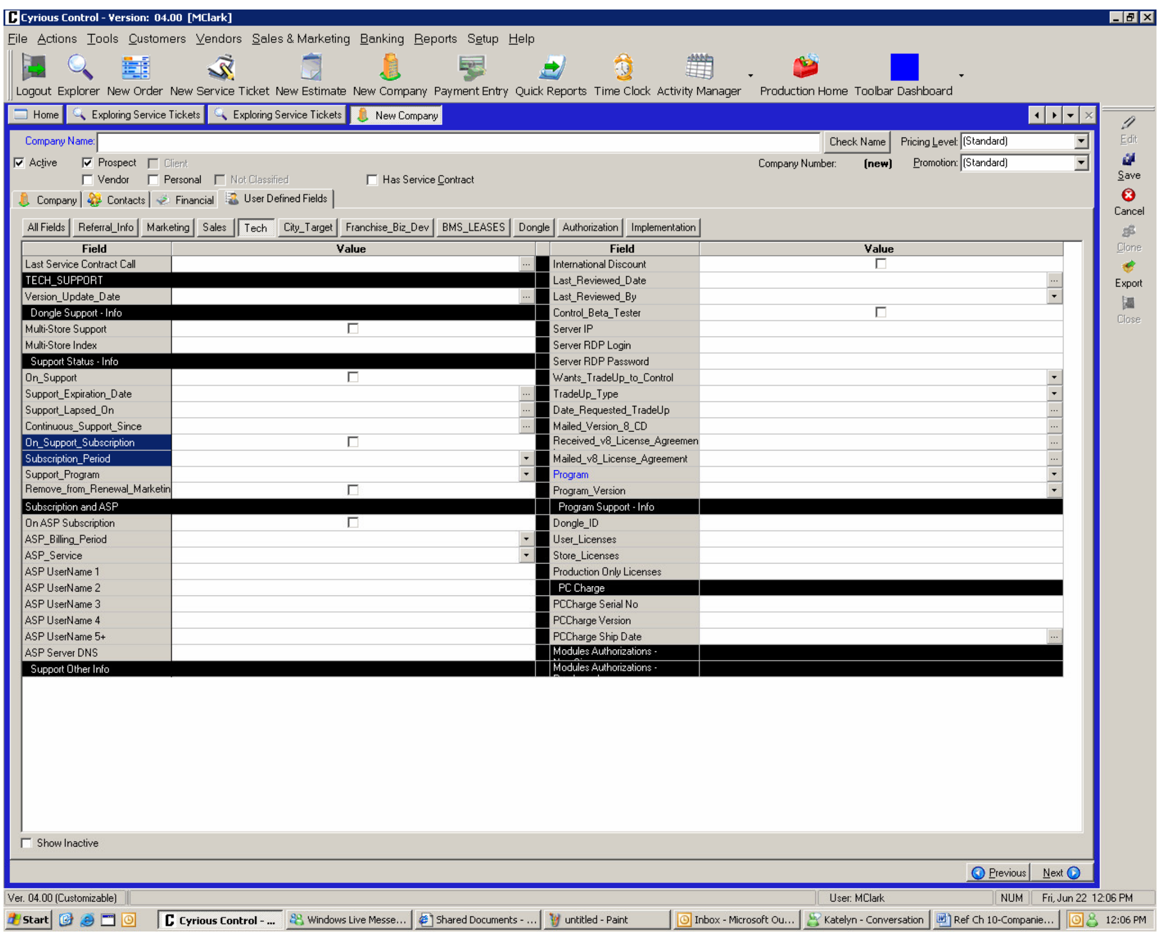
Has Service Contract – If checked off, all other fields are required.

Use the drop down boxes to designate the contract type, start date, and expiration date. Use the **Notes** box to add internal notes about their service contract.

You must enable the Service Contract tab through Setup.

USER-DEFINED FIELDS TAB

Access New Company Screen | User-Defined Fields Tab



New Company User-Defined Fields Tab

Set up User-Defined Fields for your customers.

Main Menu | Options | User-Defined Fields

Some handy customer User-Defined Fields we use at Cyrious are:

- Program Using
- Software Version Using
- Support Expiration Date
- User Licenses
- Store Licenses

EFFECTIVE USE OF COMPANY INFORMATION

DUPLICATE COMPANIES

Control does not allow duplicate company names by default. Forcing unique names for all companies prevents losing or confusing orders for companies with similar names. If necessary, you can elect the permission of duplicate names.

Check the Allow Duplicate Companies option.

Main Menu | Setup | Option Setup | Store Options | Company Options

COMPANY WITH MULTIPLE CONTACTS

Cyrious allows you to save as many company contacts as necessary for a company. You will retain a default primary contact for each company; however, the management of multiple employees and contacts further organizes complex networks of contacts and actions. This allows you to assign multiple employees to multiple company contacts.

COMPANY AND CONTACT ADDRESSES

Control allows you to enter in multiple addresses for each company, as well as for each individual contact. The billing address for the company is the primary contact address for that company and any of their contacts, unless otherwise specified.

SETTING DEFAULT SALESPERSONS

The House Account is the default primary salesperson for a company. However, you can choose to label an individual employee as a primary salesperson for a company, or for an individual contact within a company. The primary salesperson will show up by default when entering orders and estimates. In the company screen, you may choose to put up to three of your own employees as salespersons for that company.

11 : ESTIMATES, ORDERS & SERVICE TICKETS

CONCEPTS

The order, estimate, and service ticket screens largely resemble one another. To create an estimate, order, or service ticket, you must enter information describing the company and items included.

Control also allows you to save notes, check totals, include additional company information, and schedule/monitor jobs for each item or part involved in the ordering process. You can even create a set of User-Defined Fields to classify information about your orders.

An order template is a shell of a commonly ordered product for a company. This reduces time spent creating duplicate orders. You can also clone orders to cut down administrative hours.

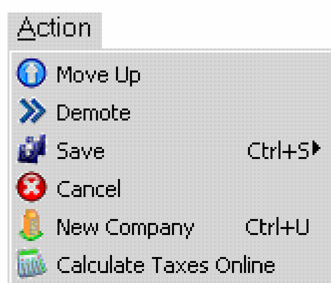
SCREENS

We will take you through the process of completing an order from start to finish. Most customers will probably ask you for an estimate before they give permission to proceed on a job, so we will show you how to create an estimate, convert it to an order, and mark it for completion.

Create a new estimate.

1. **Main Menu | New | New Estimate**
2. **Cyrious Home Screen | New Estimate**
3. **Cyrious Main Toolbar | New Estimate**

SPECIAL ACTIONS TOOLBAR FUNCTIONS



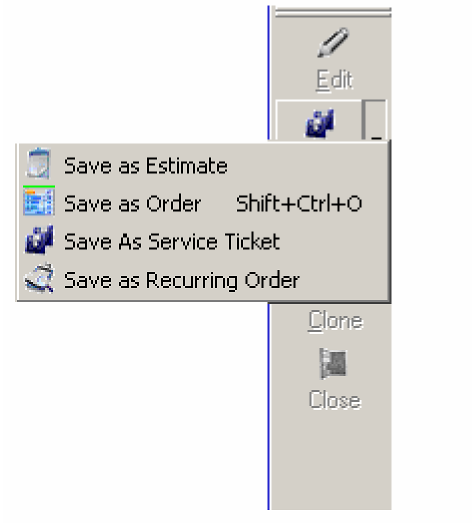
New Estimate Screen Actions Menu Options

Save – Saves all entered information. Expands so you can select whether you want to save the open record as an order, estimate, or service ticket.

Cancel – Disregards changes and additions made to a record.

New Company – Opens a screen to create a new company.

SPECIAL ACTION MENU FUNCTIONS

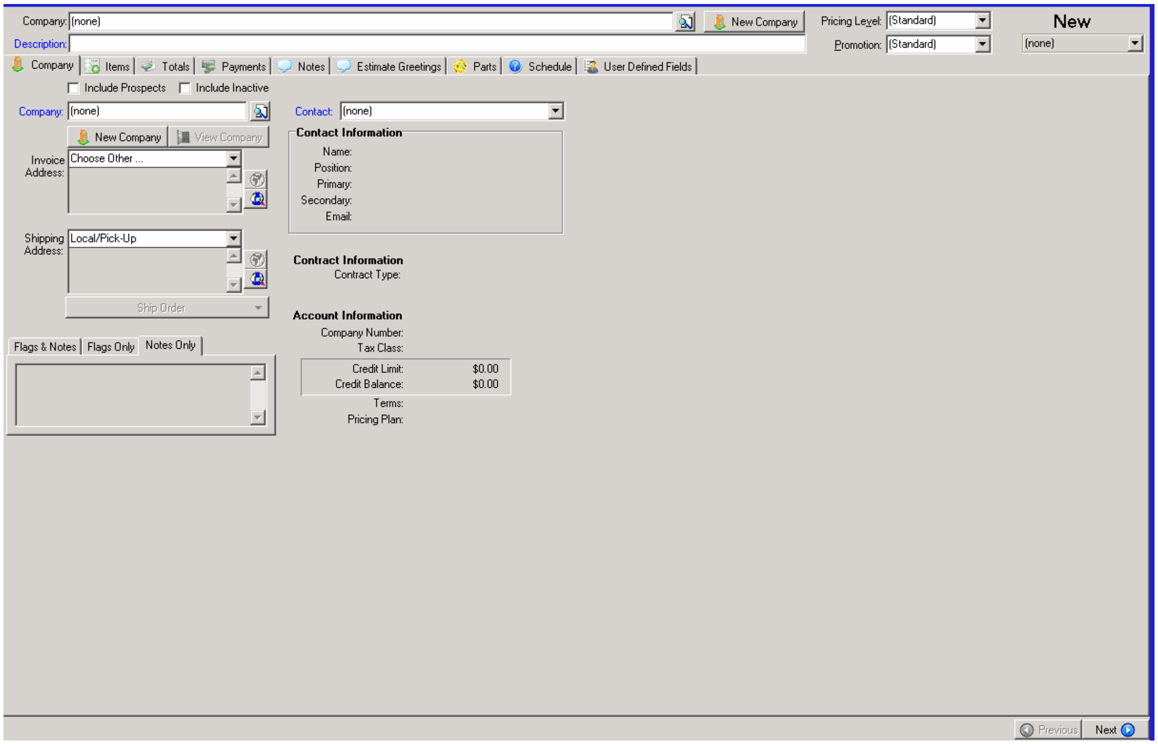


New Estimate Screen Special Actions Toolbar Print Button Options

When you have just opened the New Estimate screen, these options are available throughout the new estimate creation process i.e. all tabs mentioned below.

COMPANY TAB

Access New Estimate Screen | Company Tab



New Estimate Screen Company Tab

The Company tab is the start of every estimate. Three fields on this screen are mandatory.

1. **Description** – Type in a master description for the order.
2. **Company** – You must designate a company.

   To pull up an existing company name, either type in the first three letters of the company name and press **Enter**, or open Explorer by selecting the button to the right of the company field. When searching for companies, you can check the boxes above the entry field to include prospects or inactive buyers to broaden your search results.

   You can also create a new company by clicking the **New Company** button below the entry field. After creating a new company entry, it will auto-populate in the New Order screen.

   Once you select or create a company, their invoicing and shipping addresses will auto-populate in the boxes below.

3. **Contact** – This option is available after you have entered a company name. You have the option of using the selection list to search for it. Once you select a contact, their information will auto-populate in the Contact Information box below.

Ship Order – Click this button to choose whether you want to ship this order to the invoicing or shipping address. Alternately, you can enter in a completely different shipping address.

View Company – Click this button to open up the company record in a separate Explorer window. You can make any needed changes in that window, and after saving the updated record, the changes will show up in the New Order window.

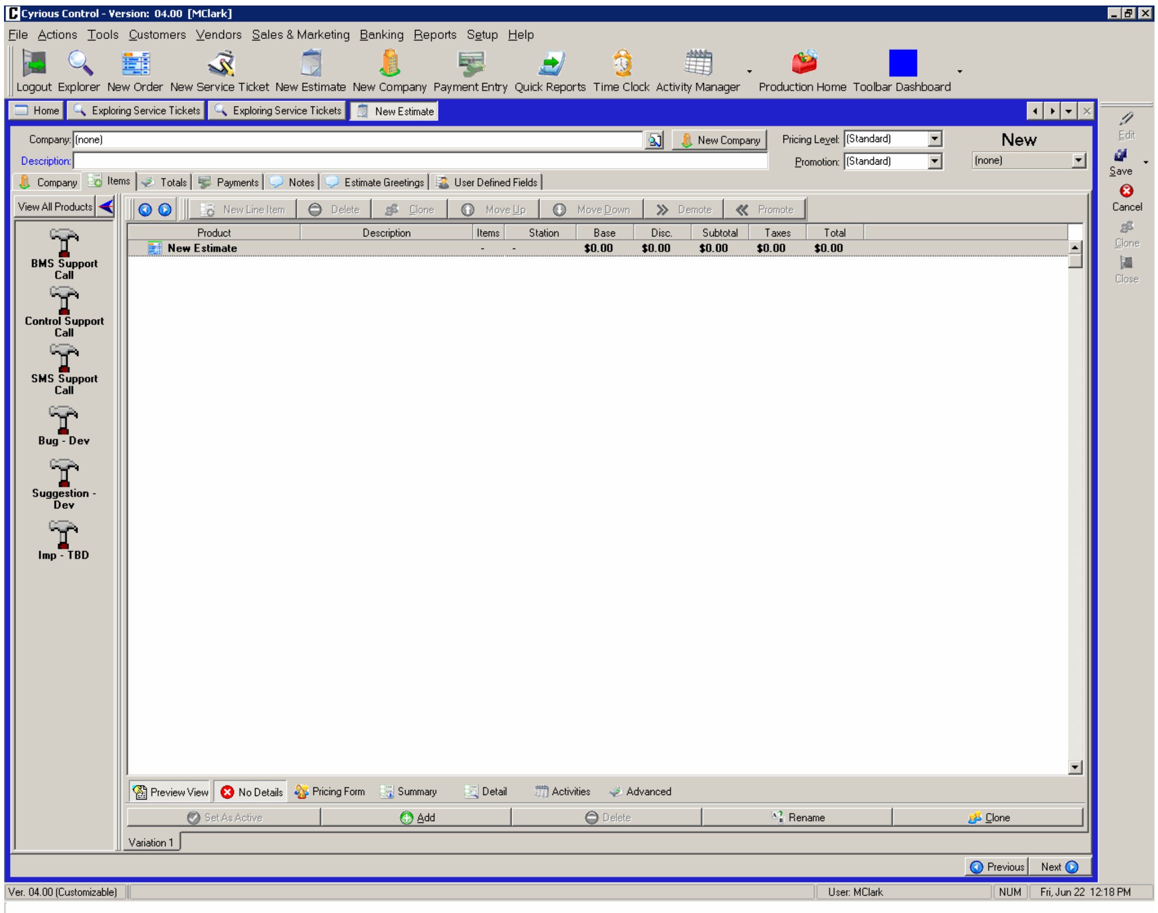
Contract Information – The type of contract you have with this company, if any, will show up.

Flags/Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

Account Information – The company's financial summary will show here.

ITEMS TAB

Access New Estimate Screen | Items Tab



New Estimate Screen Items Tab

Use this screen to enter the items for your estimate. Your Quick Products list will initially appear in the box at the left, but you can choose to view all items, as is shown in the screen capture above.

To add items to an estimate, do the following:

1. Locate the product you want to add to the estimate in the product tree displayed in the box to the left

2. Double-click the item you want to add to the estimate

3. Depending on how you have set up your product, you may get a pop-up screen asking you to enter in additional details about the product (size, color, discount)

4. Keep adding items to the estimate until you are done.

There are additional functions available in the main Items tab screen.

Copy New Line Item – Copies the line items you have added to an order.

Copy All Line Items – Copies all line items in the order.

Blue arrow – Pressing the big blue arrow will toggle between viewing your Quick Products and viewing a product tree as shown in the above screen capture.

View Quick Products – Designate the Quick Products you want members of this group to see when they initially log in to Control.

New Line Item – Creates a new line item.

Delete – Removes an estimate or product from the database.

Clone – Copies a pre-existing order, estimate, or product to a new record.

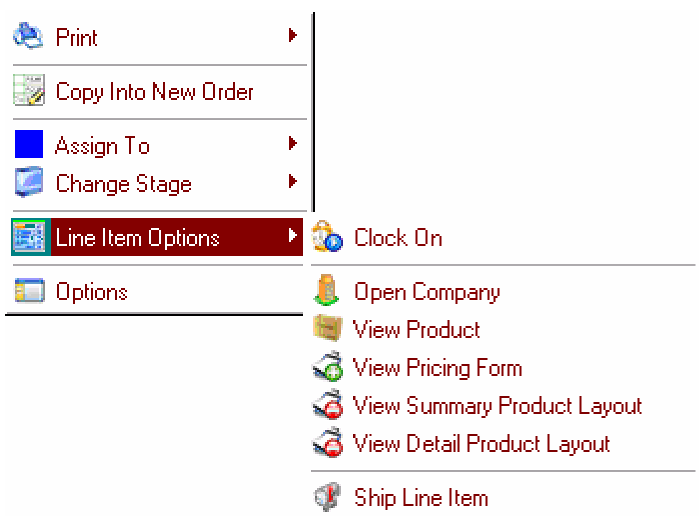
Move Up – Moves the selected line item up.

Move Down – Moves the selected line item down.

Demote – Moves the selected line item down one level.

Promote – Moves the selected line item up one level.

RIGHT CLICK OPTIONS



New Estimate Screen Items Tab Action Menu Options

Print – Prints the selected order, estimate, company, etc.

Copy Into New Order – Opens a screen to create a new order.

Assign To – Expands to show a list of employee names. Select the employee you want assigned to this item.

Line Item Options – Expands to show a list of functions you can perform that are pertinent to the item. Clock an employee onto that job; view the company, product, pricing, and product layout.

Options – Opens a list of options for your customization.

VIEW TOOLBAR

New Estimate Screen View Toolbar

The tool bar directly below the line item entry field contains some additional options for viewing information about products.

Preview View – Shows a short summary description of the products on the Line Item Entry screen.

No Details – Collapses the summary descriptions, leaving a short list of products.

Pricing Form – Reveals the pricing form for a highlighted item. You can make changes on this form for the items selected.

Summary – Reveals the product layout for invoices/orders.

Detail – Reveals the product layout for work orders.

Activities – Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

From this screen, you can also assign an employee to that activity. Select the **Clock In** button to begin the process. If the employee has not previously clocked in, he/she must do so at this time.

Parts – Reveals the parts included in the highlighted item. You can make changes to the parts listed in this section. Double click on the portion you wish to change and enter the new information.

Summary Schedule – View and schedule jobs for an individual item.

Advanced – Assign the sale account for an item. You can override the default account by selecting a new sale account for an item. From this screen, you can also assign an employee and stage to the item. You can also change the default address to a new shipping address for each item on the order. This will also change the tax on that item.

USING THE VARIATION TOOLBAR

New Estimate Screen Variation Toolbar

The Variation toolbar, directly below the View toolbar, is the only notable difference between the order and entry screens. The Variation toolbar allows you to create alternate estimates for a potential order without forecasting multiple estimates. All variations will print on the same estimate. The first variation listed is the one that will be included on your expected revenues.

Set as Active – Designate the order the buyer is most likely to approve.

Add – Create a new tab and alternate estimate. You must name your variation before you can begin entering items.

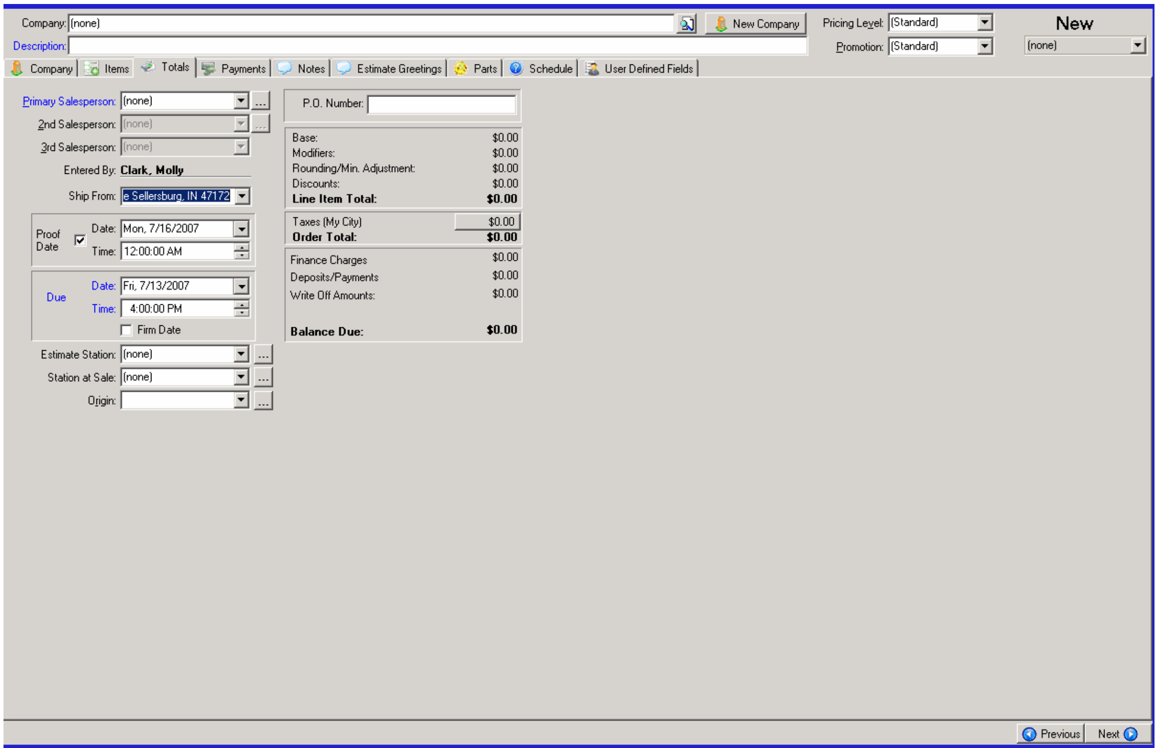
Delete – Removes a variation.

Rename – Renames a variation.

Clone – Copies a pre-existing variation. This is ideal if you only want to tweak one or two things.

TOTALS TAB

Access New Estimate Screen | Totals Tab



New Estimate Screen Totals Tab

Primary Salesperson – Check this box to assign salesperson status.

Second Salesperson – Check this box to assign salesperson status.

Third Salesperson – Check this box to assign salesperson status.

Entered By – Displays the name of the employee who entered the record.

This field cannot be changed.

Division – A division is a group of employees that you wish to keep separate for documentation purposes. A division is part of a company and can consist of both employees and sub groups.

Overridden – Designates if the default value has been overridden.

Proof Date – If the box is checked, you must enter in a delivery date.

Due Date – Enter in a due date for the product.

Firm Date – Check this box to designate a due date as final; the customer will not accept the product after this date.

Estimate Disposition – The kind of order this is.

Disposition at Sale – The kind of order this will be when it is sold.

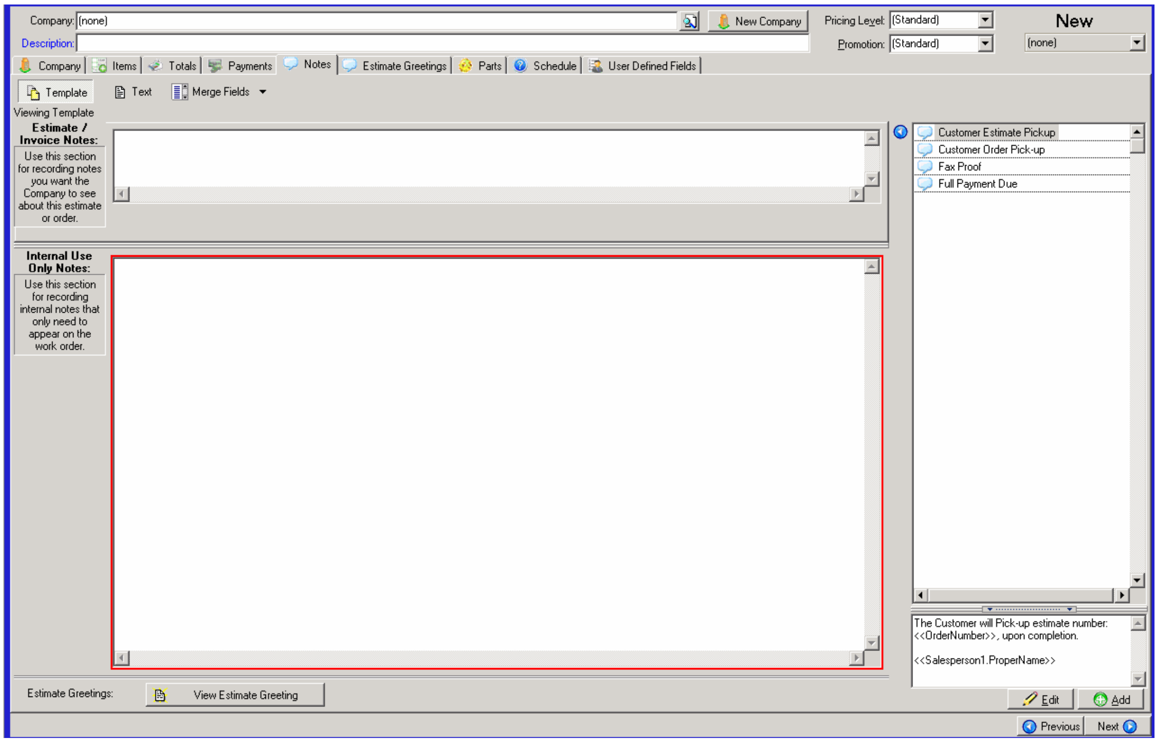
Order Origin – The origin of the order.

P.O. Number – Purchase Order number.

Pricing breakdown – This tab will display the breakdown of every charge for this order. You cannot change anything from this area of the screen if the amount in dollars is not displayed on a button. In the screen capture above, you could click on the $5.00 button on the City Taxes line. Use the Items tab to alter any other prices.

NOTES TAB

Access New Estimate Screen | Notes Tab



New Estimate Notes Tab

Template mode – Mode where using templates is easily accessible, as pictured in the above screen capture.

Text mode – Mode where entering text is enabled.

Merge Fields – Used to create Speed Notes.

Estimate/Invoice Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

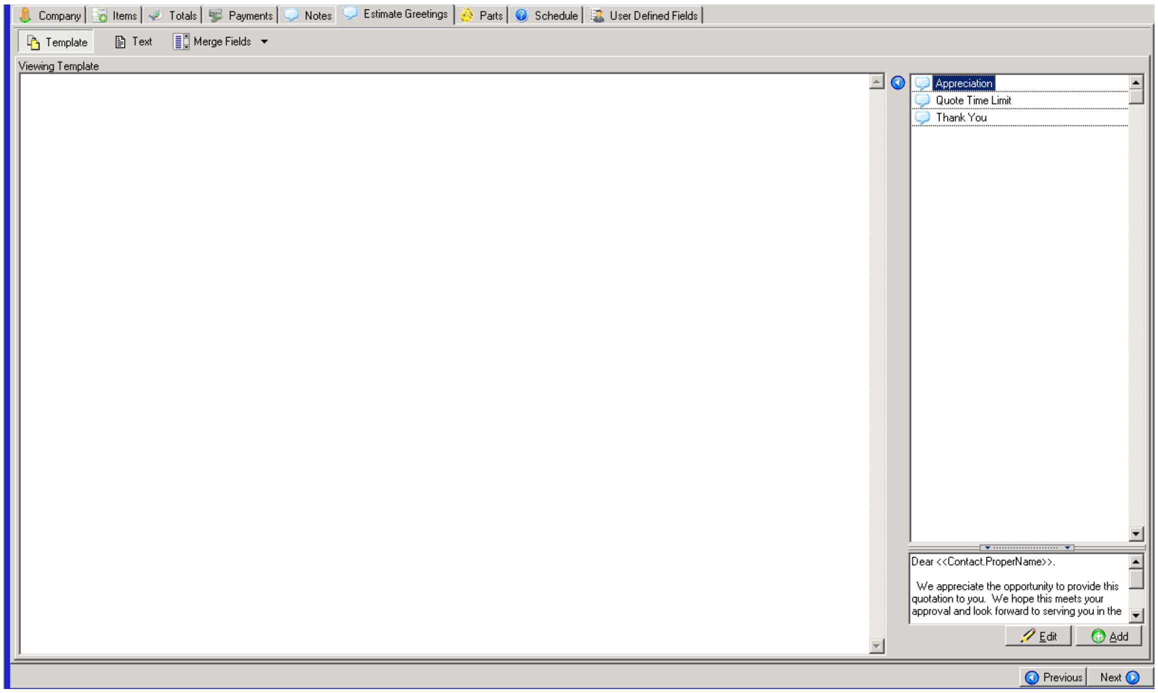
Internal Use Only Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

Speed Notes – Other specific information about the sub group. These notes are visible only to persons authorized to access the Employee Setup.

View Estimate Greeting – Opens a pop up window that shows what text will appear at the top of the invoice. You can use Speed Notes for this, too.

ESTIMATE GREETINGS TAB

Access New Estimate Screen | Estimate Greetings Tab



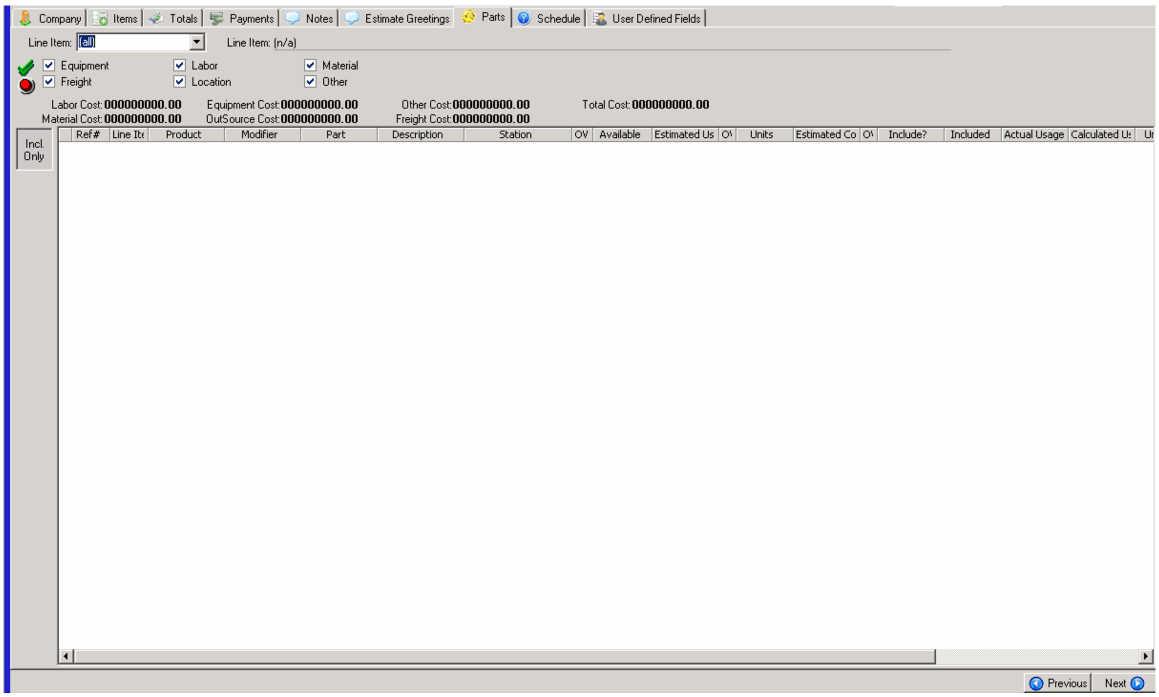
New Estimate Greetings Tab

Use this section to designate the greeting that will show up on the estimate. You may either enter in your greeting manually or select a message from the Speed Notes list to the right of the box.

This tab functions exactly like the Notes tab, except the information that shows here will only print out on the estimate, and not on the order itself.

PARTS TAB

Access New Estimate Screen | Parts Tab



New Estimate Parts Tab

Use this screen to view all of the parts used in all of the line items in the estimate. This helps if you want to review costs incurred from the variables entered when assigning parts. You can filter the parts for viewing by using the check boxes with the parts' description labels.

You can adjust the actual costs of the individual parts by typing over the costs that appear in the Cost columns. Doing so automatically checks the OV (override) button.

Leave estimated costs as they are.

Ref# – An automatically generated number used to keep track of your parts.

Line Item – The line item number to which this part corresponds.

Product – The product to which this part corresponds.

Modifier – Any modifiers to which this part corresponds.

Part – Enter the part name to which you want to bill time. If you do not know exactly how the record is entered in Control, you have the option of using the selection list to search for it.

Description – Description of the part.

Available – Denotes whether or not that part is available/in stock.

Estimated Usage – How much of the part is going to be used to fill this order.

OV check box – Check if any value needs to be overridden.

Units – The units used for this part.

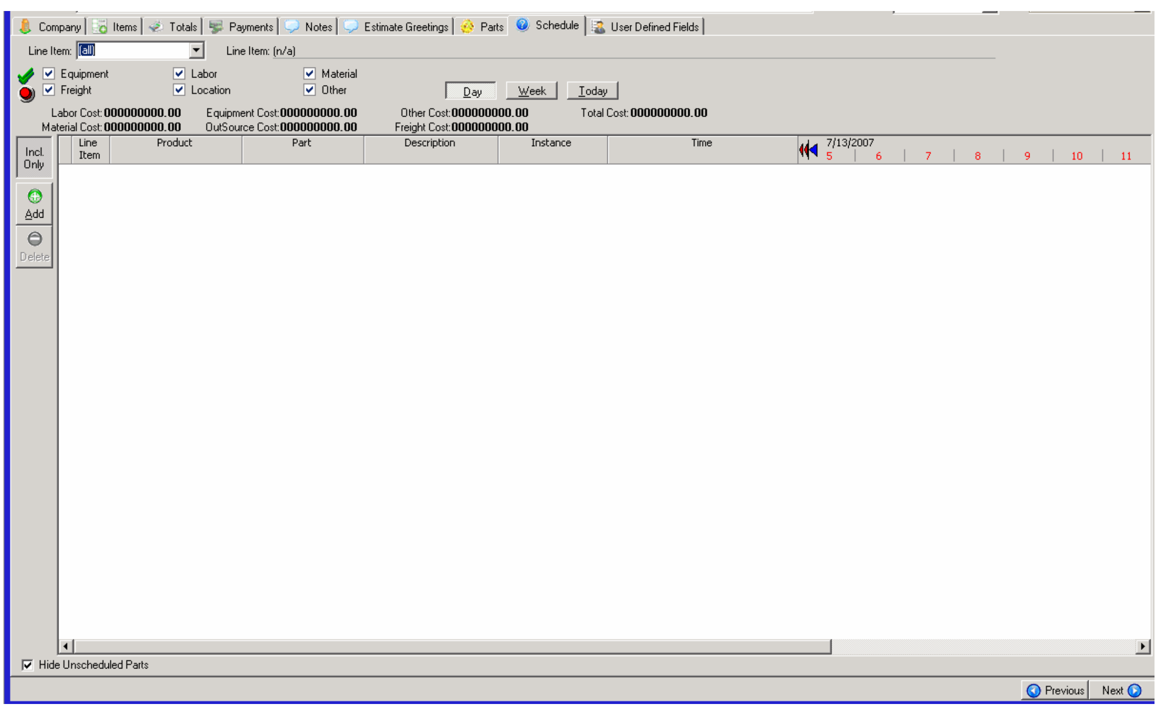
Estimated Cost – Amount it will cost to use the estimated amount of the part.

Actual Usage – Calculated after the order is complete. Shows how much of the part was actually used to complete the order.

Actual Price – Calculated after the order is complete. Shows how much the amount used cost.

SCHEDULE TAB

Access New Estimate Screen | Schedule Tab



New Estimate Schedule Tab

Each part may have a calendar, though that is not necessary. If you select labor in a calendar, you may assign an employee to that job.

Line Item – The line item number to which this activity corresponds.

Product – The product name.

Part – The part name.

Description – Description of the activity.

Instance – Denotes the frequency of the activity displayed.

Time – Scheduled time for the activity.

Timeline – If you have selected a day view, this area will display hours. If you have selected a week view, this area will display days.

ASSIGNING A CALENDAR TO A PART

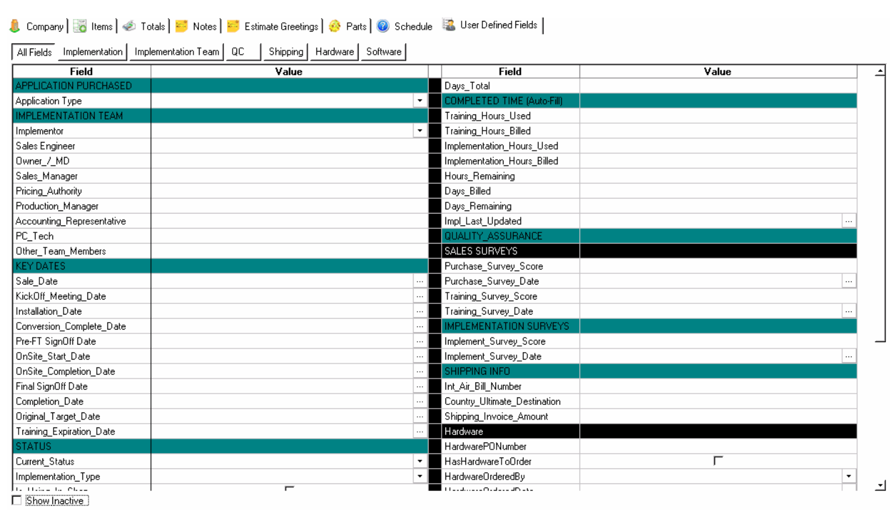
1. Select a part instance from the drop down list
2. Designate a block of time to schedule that activity
3. Double click in the time slot to reveal a New Activity screen

Use the Calendar tab to schedule both equipment and labor, and view if equipment and labor are scheduled at the same time.

Control does not prevent you from overlapping scheduled employees or parts.

USER-DEFINED FIELDS TAB

Access New Estimate Screen | User-Defined Fields Tab



New Estimate User-Defined Fields Tab

This screen displays any User-Defined Fields you have set up.

ADJUSTING ESTIMATES, ORDERS, AND PARTS

You can search for an order, estimate, or company by using the Explorer button.

1. Locate the estimate you wish to adjust
2. Click Edit
3. Make your adjustments
4. Select OK to apply changes

PRE-EXISTING ORDERS

SPECIAL ACTIONS TOOLBAR FUNCTIONS

Order Actions Menu Options

Close – Close the order window you currently have open.

Print – Will expand to show options for the things you can print from this window. These options will be for invoices, shipping records, and so forth.

Activities – Expands the normal Activities menu found throughout Control.

Next Record – In this example, we are viewing Order No. 25435. Selecting this option would take us to Order No. 25436.

Previous Record – In this example, we are viewing Order No. 25435. Selecting this option would take us to Order No. 25434.

[Order No.] – This option refreshes the order window.

Explore – Expands the Explore menu. You can select a type of Explorer view, and it will open up in a new Explorer window.

Confirm Material Usage – This option opens up the Confirm Material Usage dialogue. *See Section 10.2.5, Confirm Material Usage.*

Confirm Labor Time – This option open up the confirm Labor Time dialogue. *See Section 10.2.2, Confirm Labor Time.*

New – Opens a new order window.

Clone – Clones the order you currently have open.

Edit UDFs – Opens a window allowing you to edit the order's User-Defined Fields.

Edit – Enables you to edit the order.

Estimate – Opens the order's corresponding estimate in a new window, if applicable.

Void – Voids the order.

Edit Description – Enables you to edit the description of the order.

Status – Expands to show the menu options available for changing the order's status.

Ship Order – Opens a dialog for shipping the order out.

Change Sales Disposition – Expands to show the menu options available for changing the order's sales disposition.

Change Division – Opens a dialog for changing the company's division.

EFFECTIVE USE

USING ESTIMATES AND ORDERS

Many of our companies will likely use a procedure that goes something like this:

1. The salesperson creates an estimate, and provides the customer a quote from this estimate
2. After the customer agrees to the quote, the customer signs off on it
3. Once the estimate if approved by the customer, it is converted to an order
4. No line items are sent to production until a supervisor has approved the order and payment has been processed

Integrating estimates into the workflow will help your company catch mistakes. Additionally, it is so easy to convert an estimate into an order; there really is no need to skip this step – a step that many customers favor.

CONVERTING AN ESTIMATE TO AN ORDER

Estimate Action Toolbar Convert Button Options

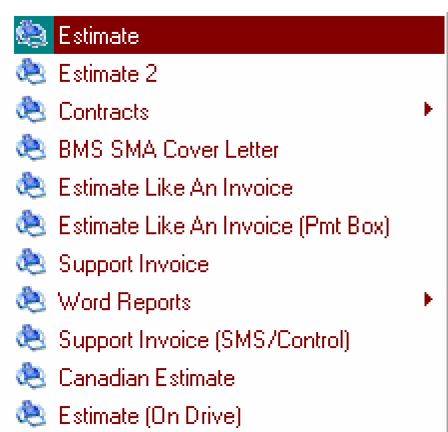
1. Click the arrow on the **Convert** button on the right hand action menu
2. Select whether you want to convert the estimate to an order (**Convert**) or a service ticket (**Convert To Service Ticket**)
3. In the window that pops up, confirm that you want to convert the estimate
4. Check the box if you want to edit the order after converting it

Cyrious will keep track of estimates, even after you have converted them. Also, after you convert an estimate into an order or a service ticket, the Internal Notes section in the order/service ticket will say something like “Converted from Estimate #308619”.

OTHER SPECIAL ACTION MENU FUNCTIONS

Void – Cancels a pre-existing order.

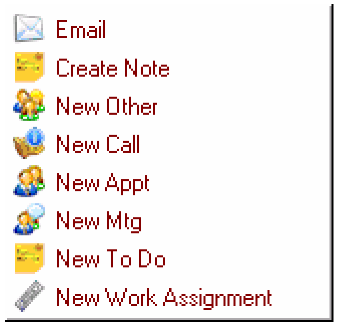
Clone – Copies a pre-existing order, estimate, or product to a new record.



Actions Toolbar Print Button Options

Print Sub Menu – Displays options for what you can print from this screen. Many of these options expand further and can be customized to meet your needs.

Mark Lost – Mark the estimate as lost, or no longer applicable.



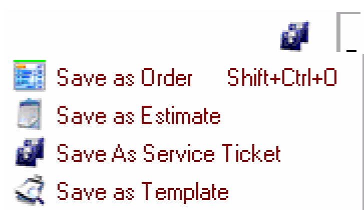
Actions Toolbar Activities Button Options

Activities Sub Menu – Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

CREATING TEMPLATES

Templates are invaluable for frequent orders.

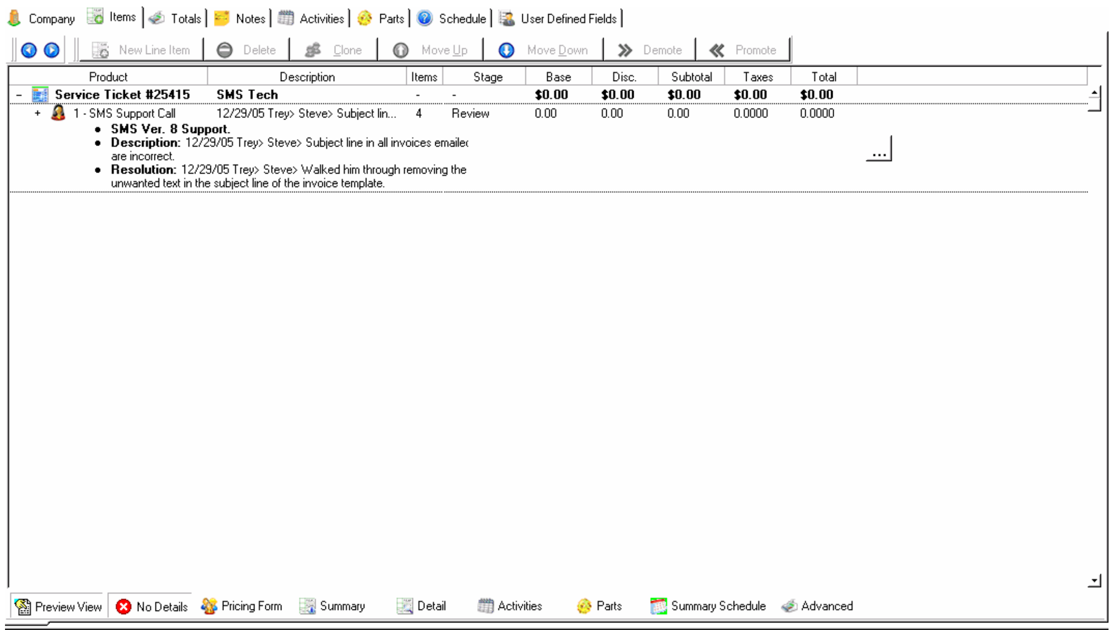
1. Create the frequently used order, such as "Qty 50 Staked Promotional Signs", which might be an order for a customer you have who works in the real estate industry and purchases this item each time a new house is listed
2. Select the arrow on the **Save** button on the right-hand action menu
3. Select **Save as Template** to make that order reusable



Actions Toolbar Save Button Options

You can search for previously created order templates in Explorer.

USING SERVICE TICKETS



Service Ticket Items Tab

Service tickets are records of services you provide to companies. Instead of adding products in the Items tab, you would add services, such as "Affix decal sign to company's automobile".

To save an order as a service ticket, select the arrow on the **Save** button on the right-hand side of an estimate or order screen. Select Save as Service Ticket. You can view service tickets by selecting an Explorer search.

STATUS

The status option is available when you are using an order or a service ticket. The Status sub menu is located in the right hand Activities menu.

As with all other sub menus, clicking the arrow will display a vast array of options. In this particular case, there are even more options available …

Actions Toolbar Status Button Options

… Moreover, the options are customizable. Here at Cyrious Software, we have created different statuses to use for orders and service tickets. Our Implementation Team can teach you how to make use of this feature to fit your company's needs.

12 : ACTIVITY MANAGER

CONCEPT

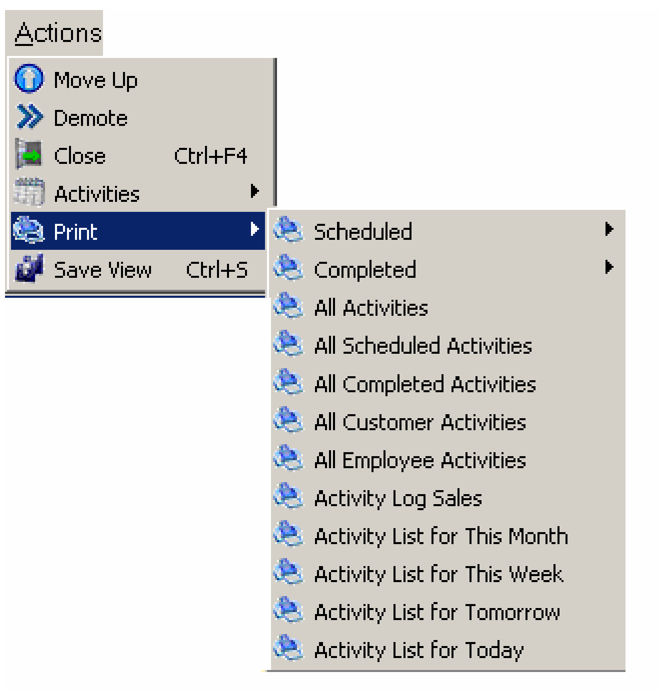
The Activity Manager schedules and tracks all employee activities. This includes all contacts made by an employee as well as all activities that an employee engages in while using Cyrious.

All activities by all employees are available for viewing by all employees.

SCREENS

1. **Main Toolbar | Activity Manager**
2. **Cyrious Home Screen | Activity Manager**

SPECIAL ACTION TOOLBAR FUNCTIONS



Activity Manager Actions Menu Options

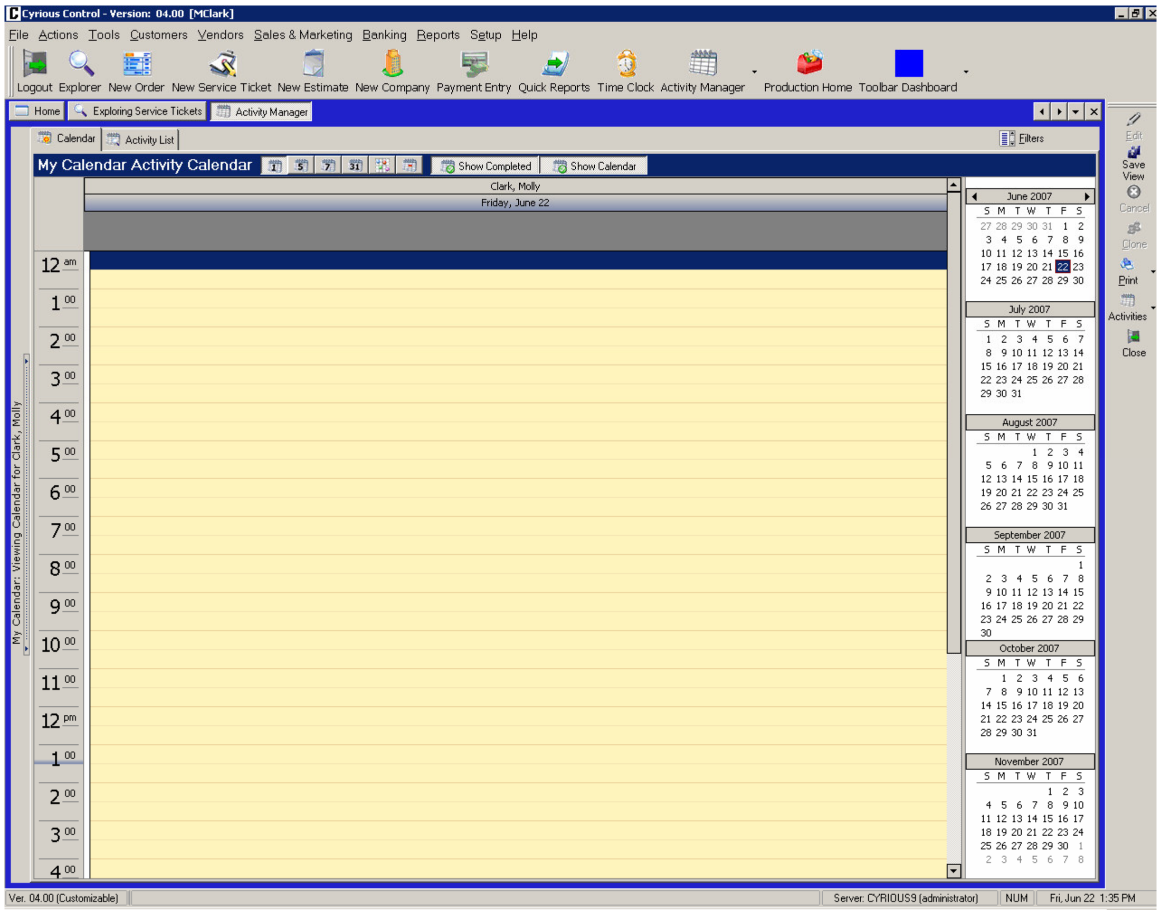
Close – Closes an unedited screen.

Activities – Expands to create an email, note, call, appointment, meeting, to do, or work assignment.

Print – Prints the selected order, estimate, company, etc.

CALENDAR TAB

Access Activity Manager | Calendar Tab



Activity Manager Calendar Tab

This calendar view of the activity manager allows you to organize and view activities in a sequential manner. Pictured here is a daily view of a single employee containing both timed and non-timed activities. The left side of the screen displays timed activities, whereas the right side of the screen shows non-timed activities.

Viewing Calendar For – In this screen capture, the scroll bar to the left of the timed activities shows a list of all employees and parts currently used in Control. Here, the Store Owner has been selected with a check mark. You may select as many employees and parts as you wish. Their activities will all show on one calendar.

This may be helpful if you ware trying to plan a meeting and you want to check the availability of multiple employees.

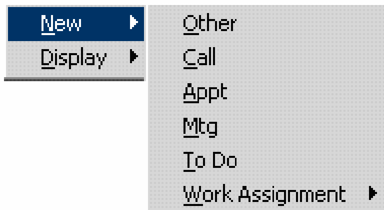
Show Completed – Selecting this box reveals all activities, including those already completed. Completed activities have a strike-through.

Calendars – Use the calendars in the top right-hand portion of the screen to select one or more days to view. Click on a single day to view, click, and drag through a grouping of days to view.

Click Here to Add a New Non-timed Activity – Use this button to reveal a new activity screen to enter in a new non-timed activity.

Filters – Reveal a list of activities from which you can select. Use this option to include only those activities necessary in the list of activities.

RIGHT CLICK OPTIONS



Right Clicking on an Item in the Calendar

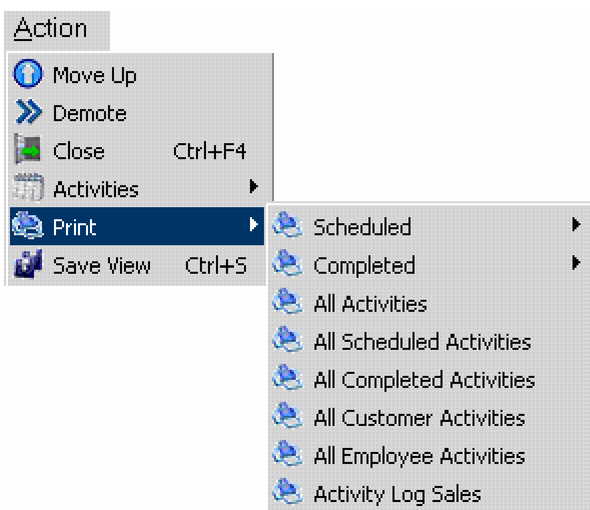
Edit – Enters a mode that allows previously saved information to be changed.

Open in New Window – Opens the highlighted record in a new window.

New – Opens a screen to create a new record.

SPECIAL ACTION MENU FUNCTIONS

The **Print** button on the right hand Activity tool bar gives you many options for printing that will help you keep track of past and present assignments.



Activity Manager Calendar Tab Actions Menu Options

Scheduled – Expands to give the User the option to print scheduled customer, employee, estimate, or order activities.

Completed – Expands to give the User the option to print completed customer, employee, estimate, or order activities.

All Activities – Prints a report of all scheduled and completed customer, employee, estimate, and order activities.

All Scheduled Activities – Prints a report of all scheduled activities.

All Completed Activities – Prints a report of all completed activities.

All Employee Activities – Prints a report of all scheduled and completed employee activities.

Activity Log Sales – Prints a log of all sales activities.

Activity List for this Month – Prints a list of all activities from the current month.

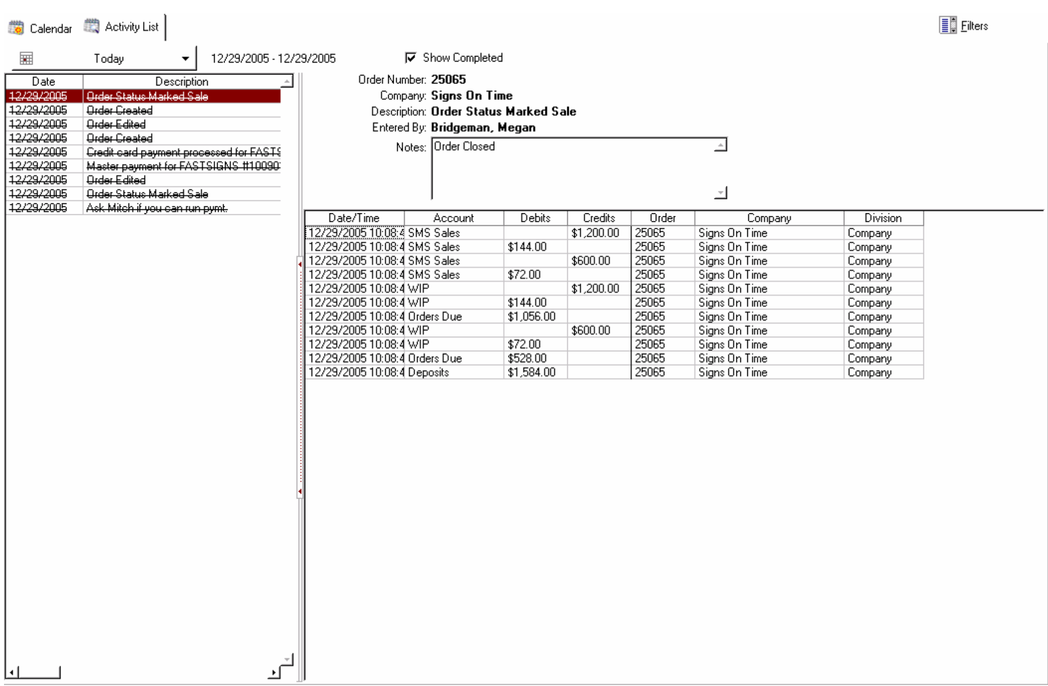
Activity List for this Week – Prints a list of all activities from the current week.

Activity List for Tomorrow – Prints a list of all activities for tomorrow.

Activity List for Today – Prints a list of all activities for today.

ACTIVITY LIST TAB

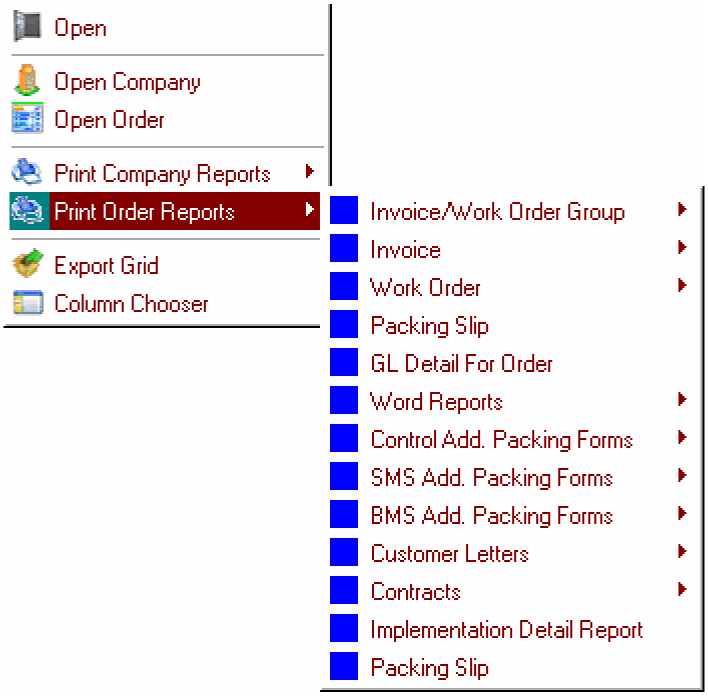
Access Activity Manager | Activity List Tab



Activity Manager Activity List Tab

You may find a simple list of activities more advantageous than a calendar view. Use the Activity List tab to view all activities as a list. Here, the left-hand portion of the screen is the list of activities to complete. The right-hand portion of the screen displays general information, where you can view activity details.

RIGHT CLICK OPTIONS



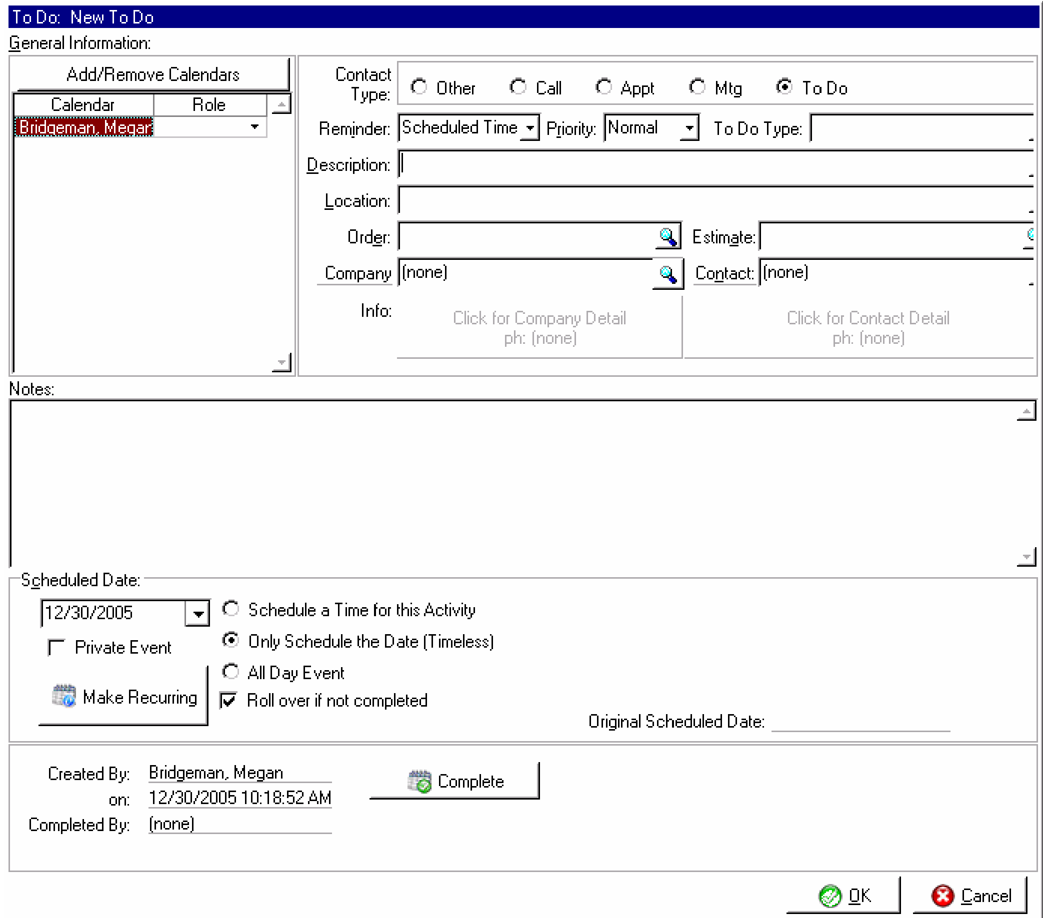
Right Clicking on an Item in the Activity List

You will get a different pop up menu depending on what kind of item you clicked on, i.e. right clicking on a service ticket will pull up a different menu than clicking on an estimate.

DATE SELECTOR BUTTON

The selection button at the top right hand corner of the screen drops down and prompts the User to select what dates to display in the current view.

NEW ACTIVITY SCREEN



Activity Manager New Activity Pop Up Window

Use the New Appointment screen to enter information about a new activity. This screen appears in the Calendar view when you click and drag to select a block of time, or when you right click on the timed or non-timed activity screens. This option is also available from the Activity List view, and on the **Main Menu | New** menu.

Add/Remove Calendars – Select this button to add employees or parts to a scheduled activity. If there are multiple employees or parts displayed in the Calendar view, they will all appear in this list, and all of them will be assigned to the activity.

Contact Type – Check the appropriate box for your activity type.

Activity (Other, Call, Appointment, Meeting, To Do) Type, Description, and Location – You may either type in the information into these fields or select from the drop-down boxes.

Set frequently used selections in these fields.

Main Menu | Setup | System Setup | Activity Manager | Pick List

Notes – Enter any additional details the employee might need about this activity.

Scheduled Date – Use the calendar to select a date for an activity, if different from the day currently selected in the Activity Manager.

Scheduled Time – Check the circle associated with the period for this activity. You may opt to have the activity roll over to the next day if not completed. If an activity is scheduled for a specific period, the option to roll over will be removed.

Private Event – Select this box to make an entry private, or visible only to the persons associated with that activity. The entry will appear for all to view, however, the description is omitted.

Make Recurring – Select this button to make an activity repeat.

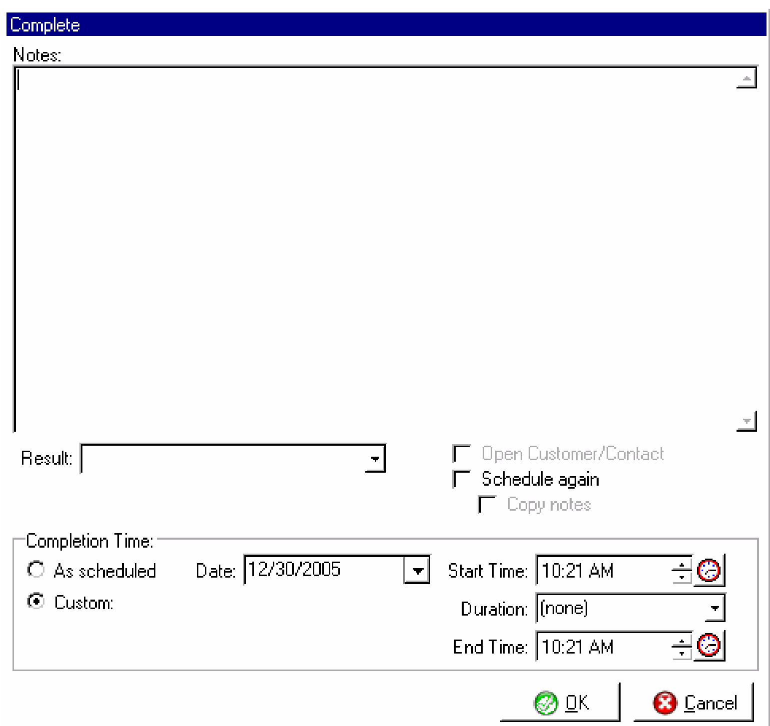
Created By – Displays who created this activity.

Completed By – Displays who completed the activity.

COMPLETE SUB SCREEN

When an assigned activity is complete, click on the **Complete** button. A screen will appear prompting you to enter information regarding the completion of that activity. Once an activity is completed, it will only appear in the Activity Manager when the **Show Completed** check box is checked.

If more than one employee is scheduled for an activity, when you mark the project complete, you will be asked if one, some, or all the employees involved in that activity have completed it.



Activity Manager Complete Sub Screen

Notes – Enter in any details about completion of the activity.

Result – Select a result for your activity from the drop-down box.

Create a list of results.

Main Menu | Setup | System Setup | Activity Manager | Pick List | Result

Schedule Again/Copy Notes – You may choose to schedule the completed event again later. Check the **Schedule Agai**n box. You can copy the notes that you have made for that activity in the future activity. You may also choose to clone that activity.

Completion Time – If you have chosen to schedule a time for an activity, you may use this section to enter a precise time for that activity. Select the **Custom Time** radio button to activate the time selection fields on the right hand side of the screen.

EFFECTIVE USE

Employees should use Activity Manager as a device to manage their own time and see how others are using their time. Keeping all employees informed of the daily activities of others, even those in different departments, helps employees comprehend what other departments need to function to full potential.

Much of the efficacy of the Activity Manager depends on using the Options Setup and filters to mold the Activity Manager to your needs. Simple setting changes will save you valuable time and mild aggravation over the course of your workday.

OPTIONS

You can set options for the store as a whole by selecting Store Options from the left-hand selection chart. An employee can also choose his/her own specifications by using the User Options selection choices.

Main Menu | Setup | Option Setup | User Options | Activity Manager

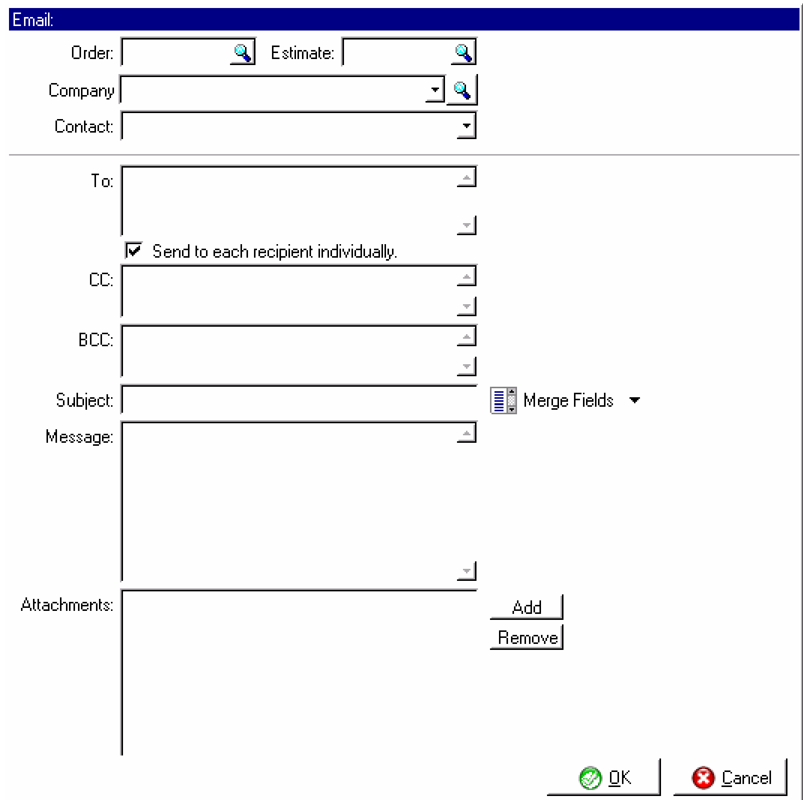
TIMED/NON-TIMED ACTIVITIES

Timed activities appear in the Calendar view. Use these for organizing or tracking daily activities. You can assign a company, estimate, or part to a timed activity to help manage billed hours. You can also assign a service ticket to an activity to help manage support time.

Often, salespersons or support staff may need to make numerous calls or perform quick activities throughout the day. Create non-timed activities for these kinds of things. You will retain a list without having to complete extraneous forms.

CREATING AN EMAIL

Main Menu | Actions | Activities | New Email



Activity Manager Email Dialogue

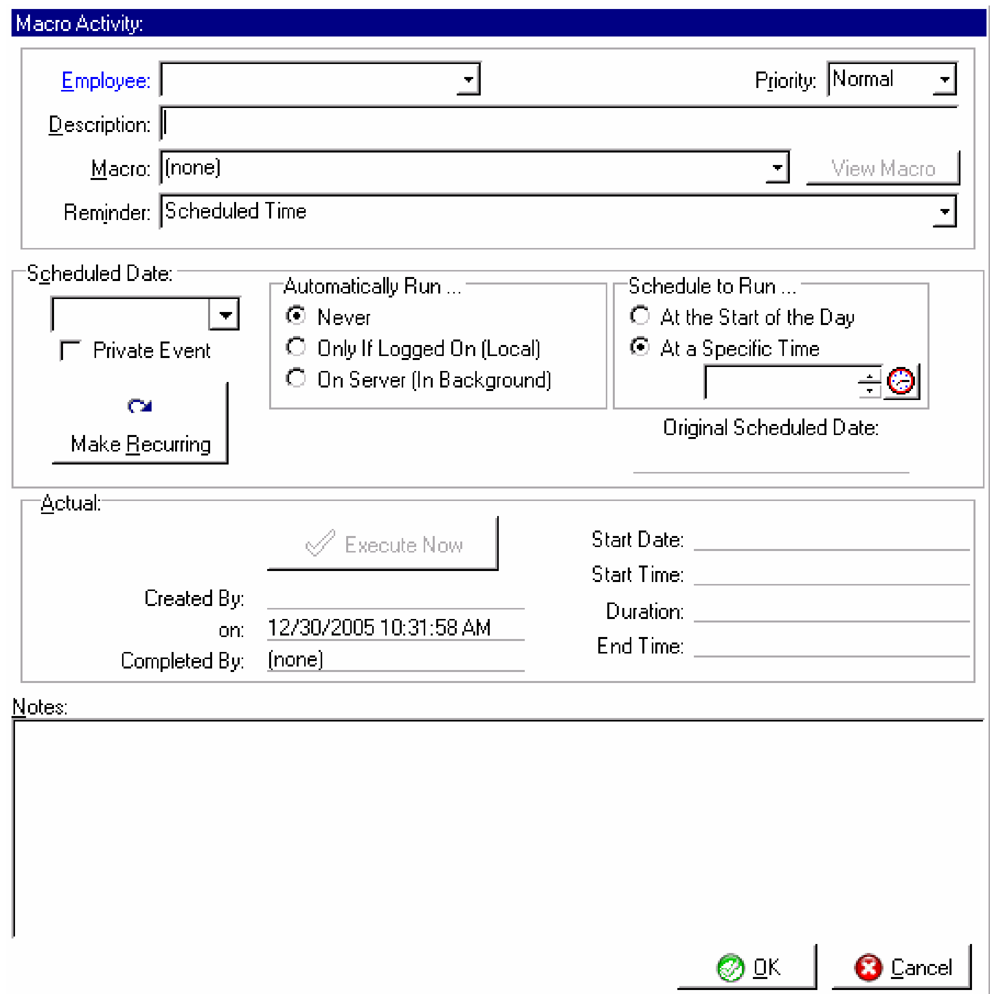
Sending emails from Control may help make your staff more productive, as they can perform this task without having to toggle between windows.

1. Choose a company, order, or estimate. Doing so will pull up the company, contact name, and contact email in the **To** field
2. Enter addresses in the **CC** and **BCC** fields
3. Select **OK** to send the email

When entering in the message, you can select from the **Merge Fields** drop down selector to insert pre-saved information, such as a standard Thank You note for a customer who has just placed an order online.

CREATING A MACRO ACTIVITY

Main Menu | Actions | Activities | New Macro Activity



Activity Manager New Macro Activity Dialogue

This dialog is the same as setting up a new activity in Activity Manager.

13 : PRODUCTION TRACKING

CONCEPT

Production is an important part of business, because after all, what you produce is what keeps customers coming back!

Control offers many tools to help ease the burden of tracking and producing multiple projects at once.

SCREENS

Main Toolbar | Production Home

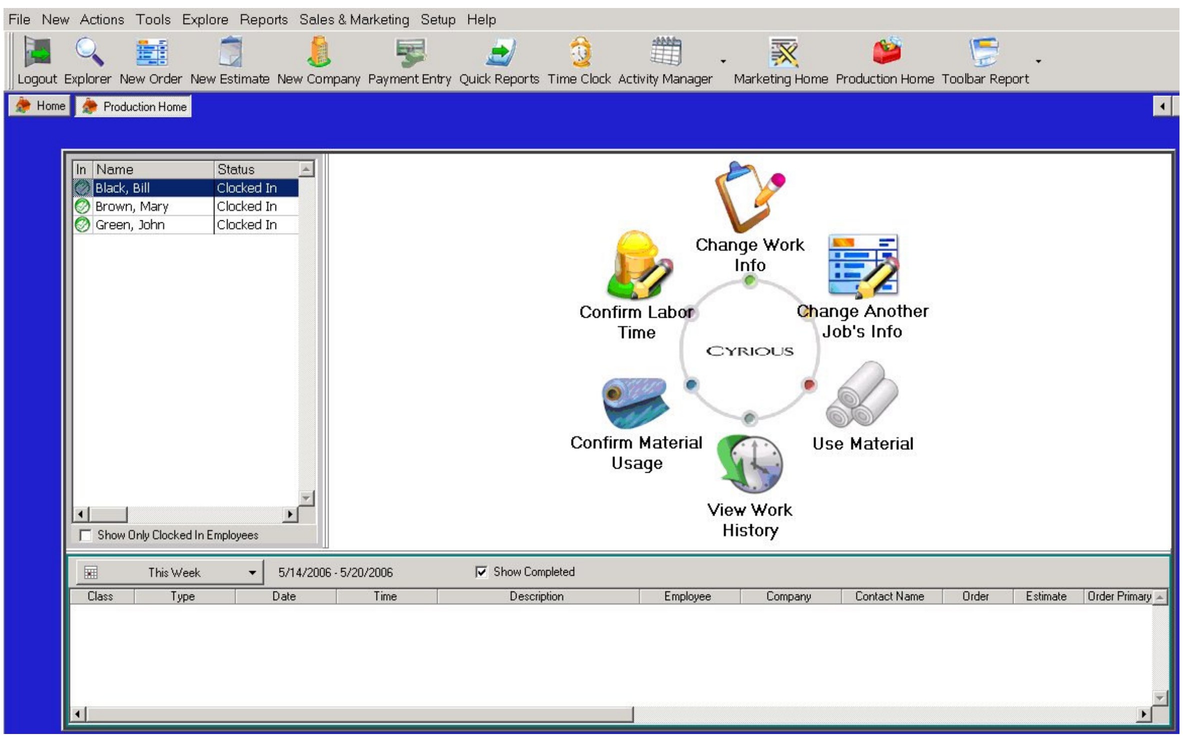


Figure 13-1 Production Home Screen

SPECIAL ACTIONS TOOLBAR FUNCTIONS

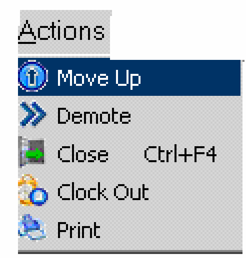


Figure 13-2 Production Home Screen Actions Menu Options

Close	Closes an unedited screen
Clock Out	Clocks the highlighted employee out for the day.
Print	Prints the selected order, estimate, company, etc.

CONFIRM LABOR TIME

Main Toolbar | Production Home | Confirm Labor Time

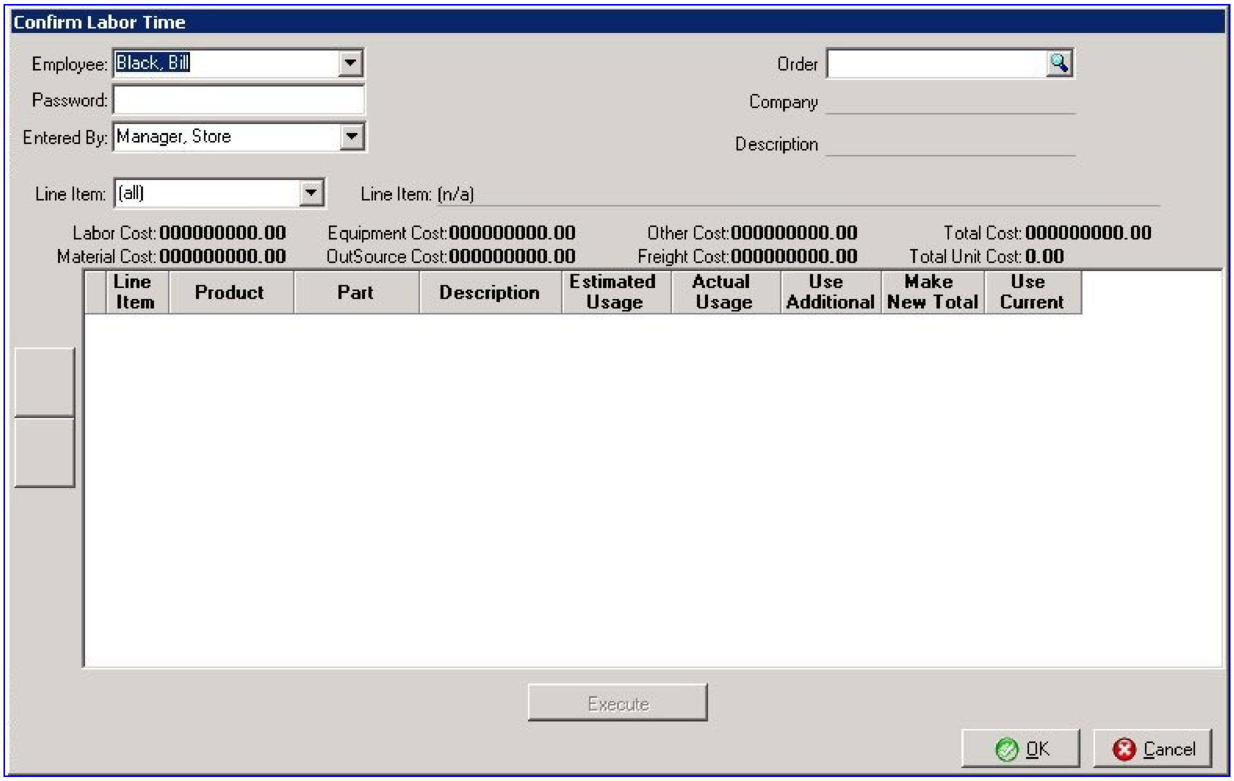


Figure 13-3 Confirm Labor Time Screen- No Order Selected

Your employees will use this screen to verify that they have spent a specified amount of time working on one particular project.

The Employee will have to enter their password in the upper left hand corner as their means of verification.

Figure 13-4 Employee Password Must Be Entered

The Order Number must be entered in the top right corner of the screen. If the order number is not known to the employee, it must be selected from a list in Explorer.

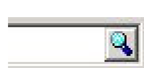


Figure 13-5 Click on the Explorer Button

Figure 13-6 Select the Order from the List

Figure 13-7 Order Number Selected

The Employee can then make changes to the Labour Time.

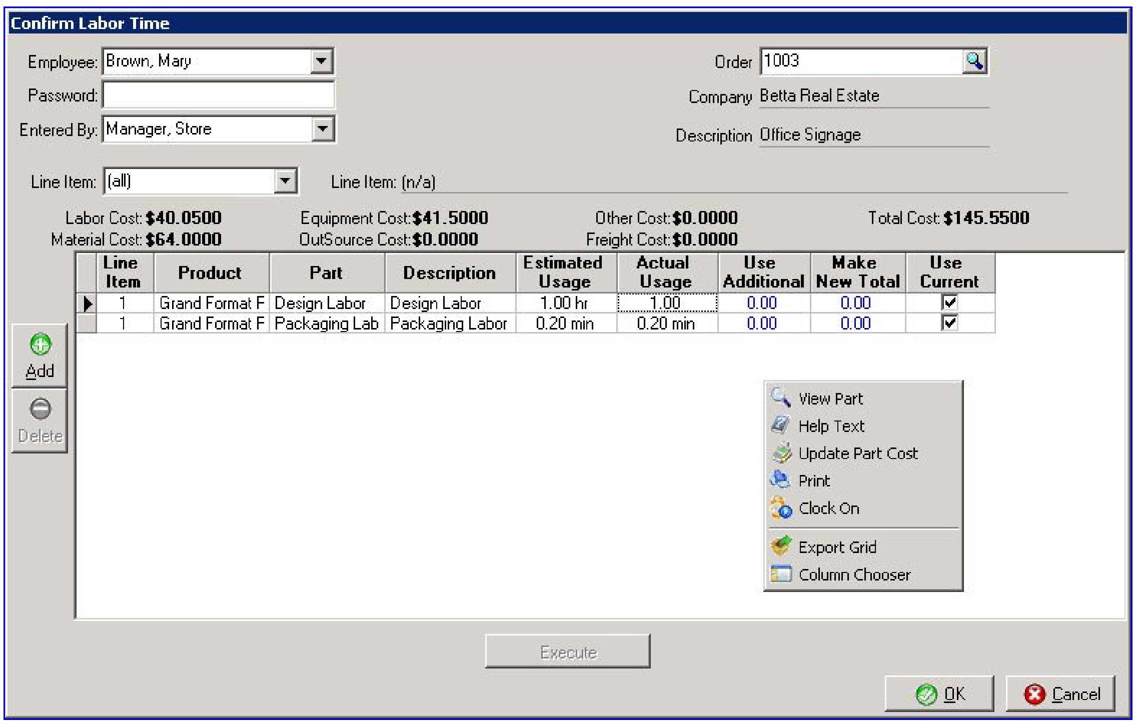


Figure 13-8 Confirm Labor Time with Order Selected and Right Click Options showing

UPDATE PART COST

Main Toolbar | Production Home | Update Part Cost

If changes are to be made to the part cost

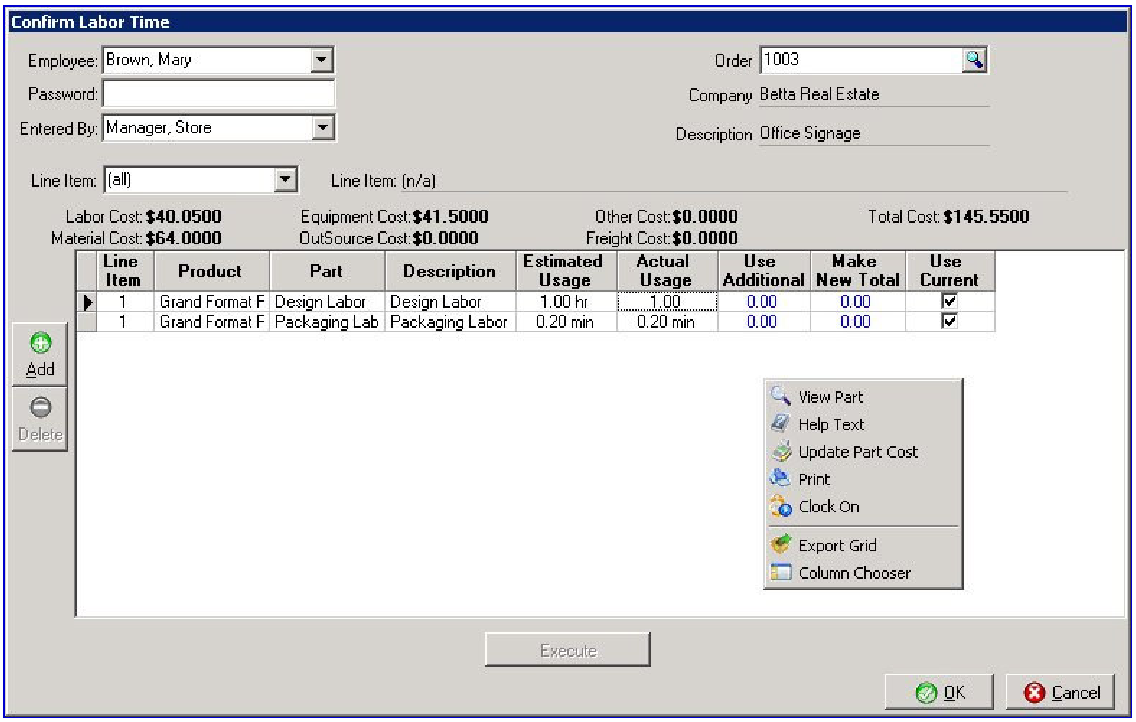


Figure 13-9 Confirm Labor Time with Right Click Options Options

Description of the various fields …

Add Add New Line Item to the Order.

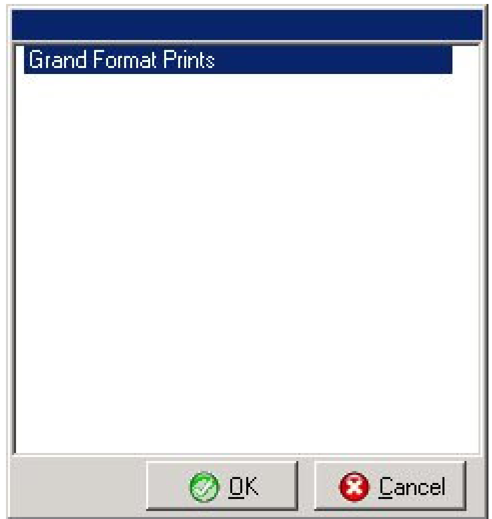


Figure 13-10 Add Line Item Screen1

The

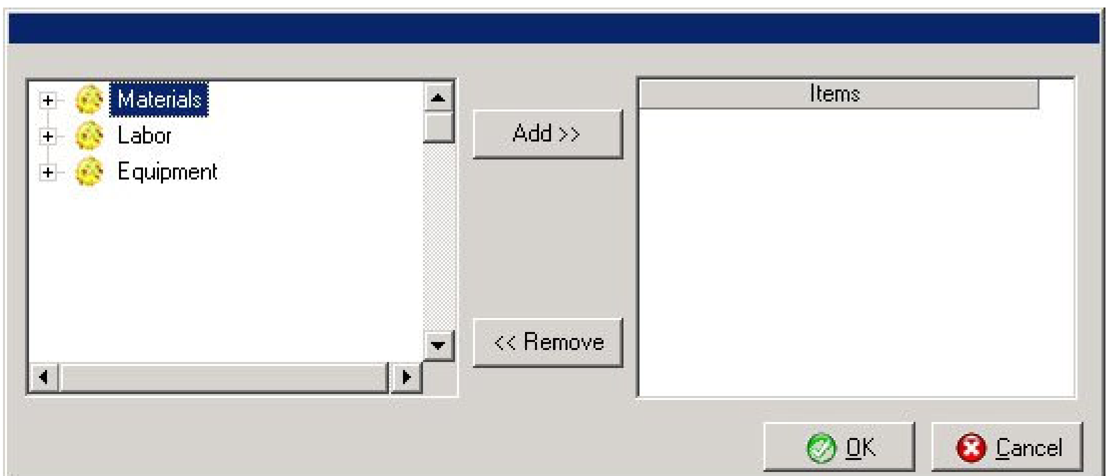


Figure 13-11 Add Line Item Screen 2

To select the new Line Item, click on the category at the left, then select the part from the list below. Click on the Add button then select OK.

This will add the new Line Item to the order

Need another screen with line items in the right column

RIGHT CLICK OPTIONS

Right Click Options - Should these be under their own headings

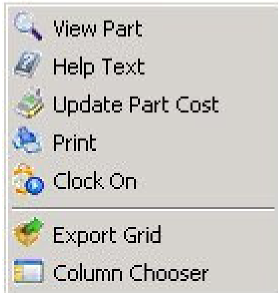


Figure 13-12 Confirm Labor Time Right Click Options

VIEW PART

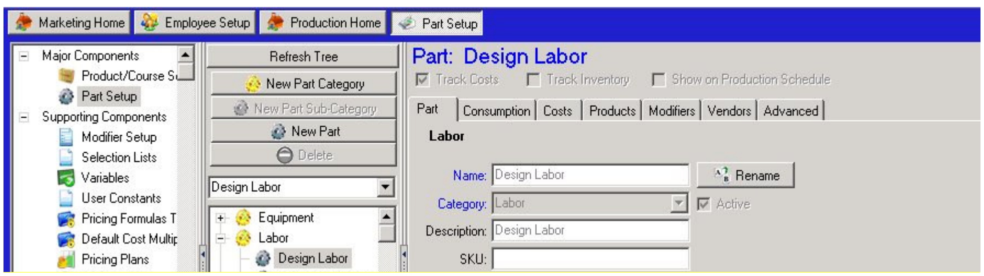


Figure 13-13 View Part Menu Option - Part Setup Screen

HELP TEXT

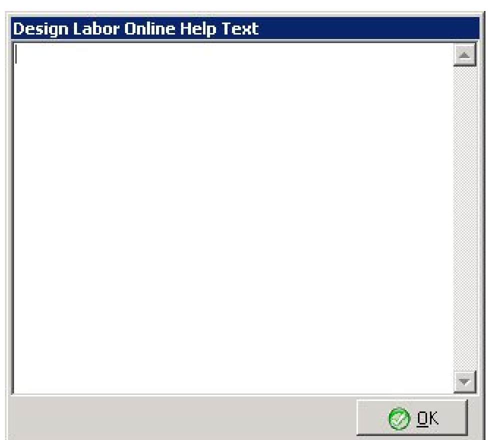


Figure 13-14 Help Text Screen For Additional Information

UPDATE PART COST

Figure 13-15 Update Part Cost

CLOCK ON

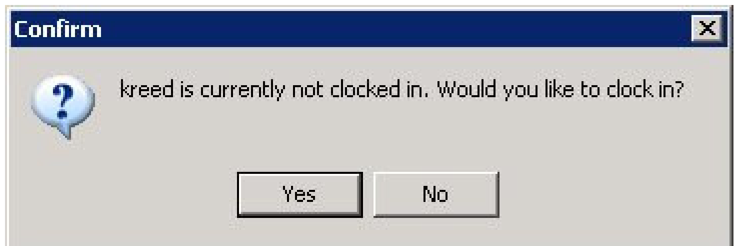


Figure 13-16 Clock On

Figure 13-17 Warning Message After No Was Selected

Figure 13-18Clock On Requires A Password

EXPORT GRID

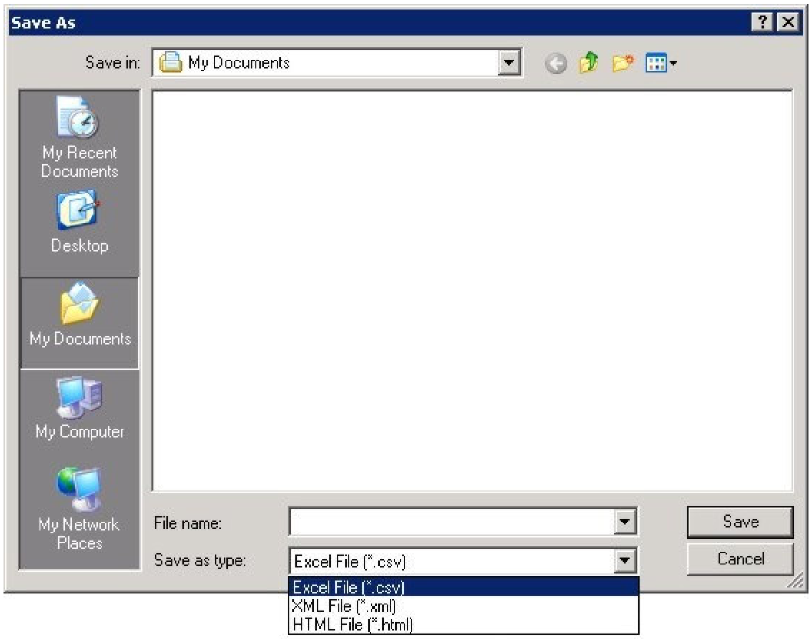


Figure 13-19 Export Grid- File Options

When exporting, the options available are where to save the file, what file type and the file name.

CSV

XML

HTML

COLUMN CHOOSER

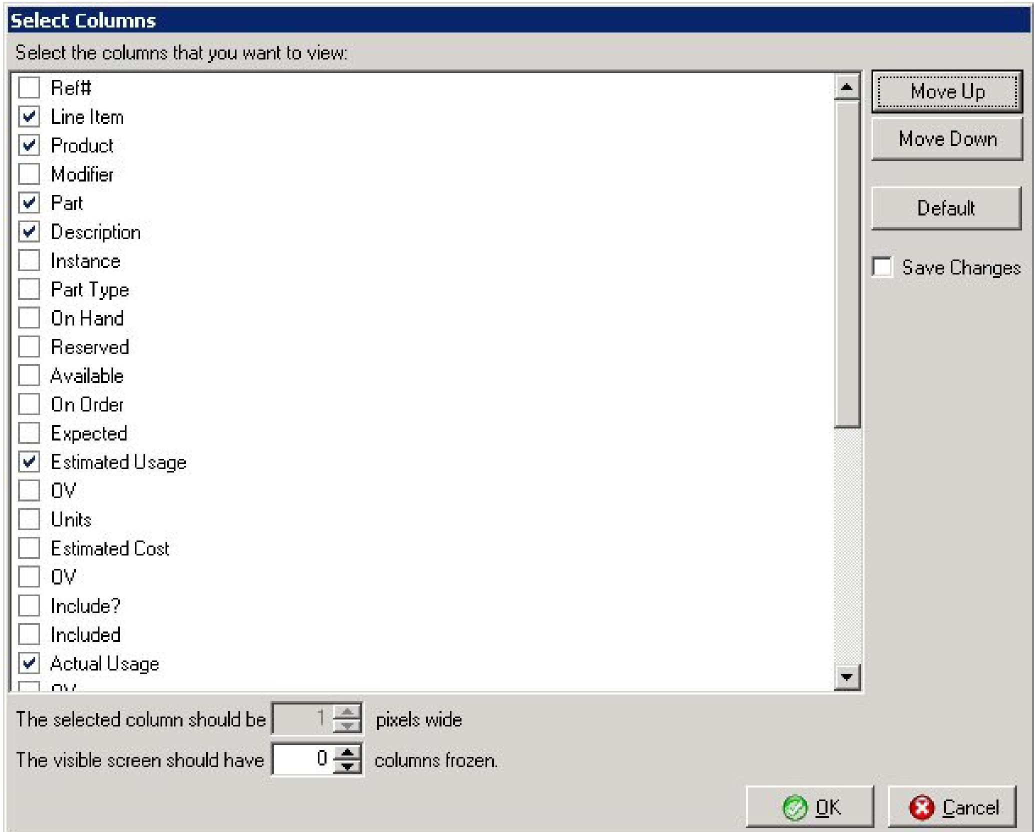


Figure 13-20 Column Chooser Options

Description of Column Chooser…

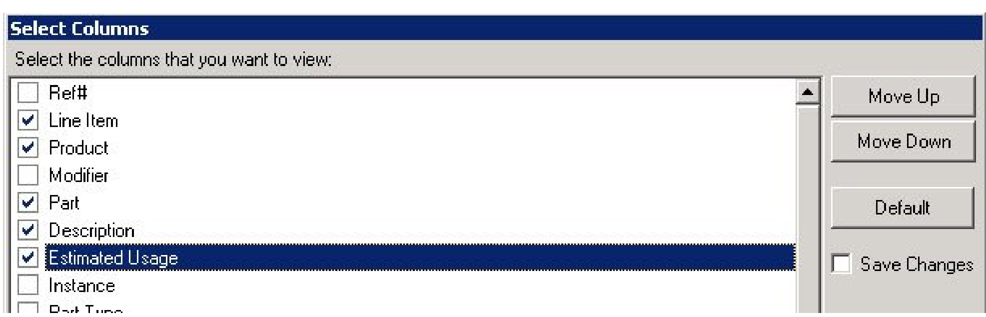


Figure 13-21 Estimated Usage Option Selected & Moved Up

CHANGE WORK INFO

Main Toolbar | Production Home | Change Work Info

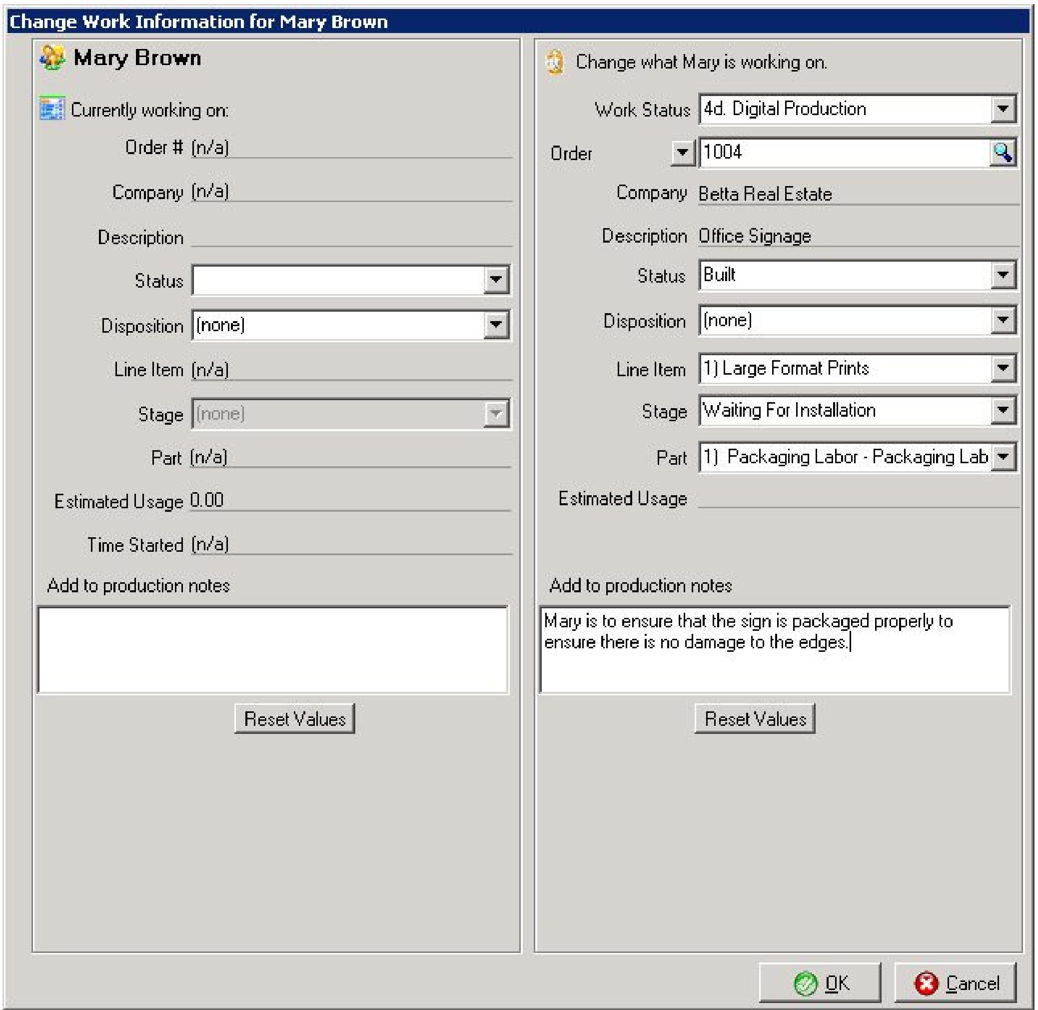


Figure 13-22 Change Work Info Screen

Managers can use this box to re-assign an employee to a different project and add production notes as required.

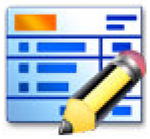
The left side of the screen shows which project the selected employee is currently working on.

On the right side of the screen, you can select information for which project you are re-assigning the employee to.

1. Enter or search for the order number you want the employee to work on. Make sure this value auto populates in the **Order** box.
2. Add any additional information to the production notes.
3. Click on **OK**.
4. The employee will receive an alert that they have been reassigned.

The alert is …

CHANGE ANOTHER JOB'S INFO



Main Toolbar | Production Home | Change Another Job's Info

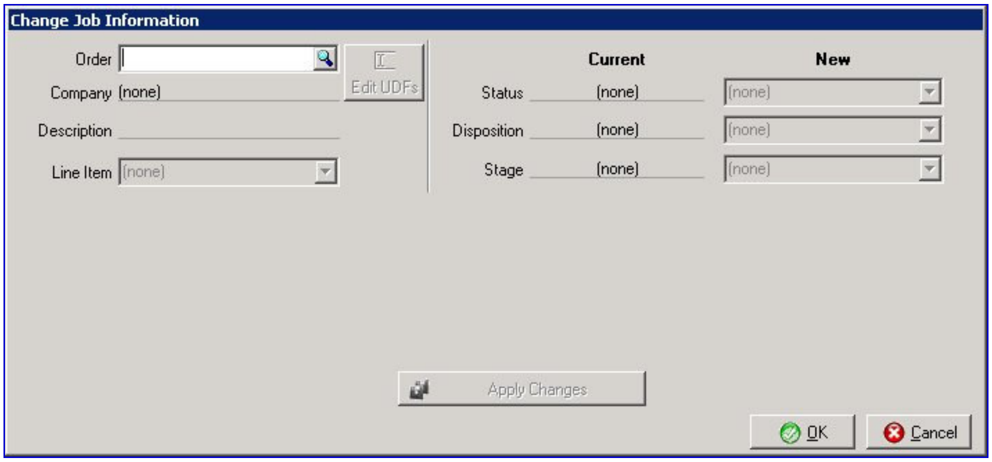


Figure 13-23 Change Another Job's Info Screen

Once the Order Number has been selected, use this screen to change the status, disposition and line item.

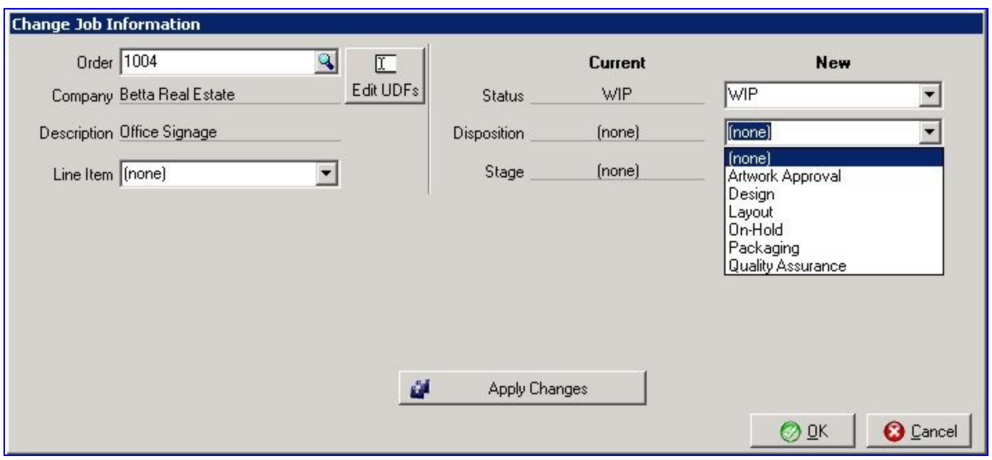


Figure 13-24 Change Another Job's Info Screen

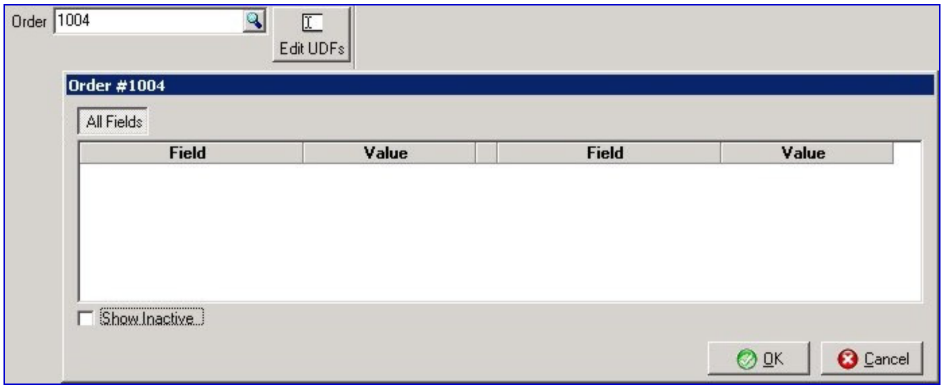


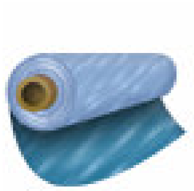
Figure 13-25 Edit UDF's Screen

UDF's are User Defined Fields … Insert Text

Figure 13-26 Confirm Changes to UDF's have been applied.

User Defined Fields are used to …

CONFIRM MATERIAL USAGE



Main Toolbar | Production Home | Confirm Material Usage

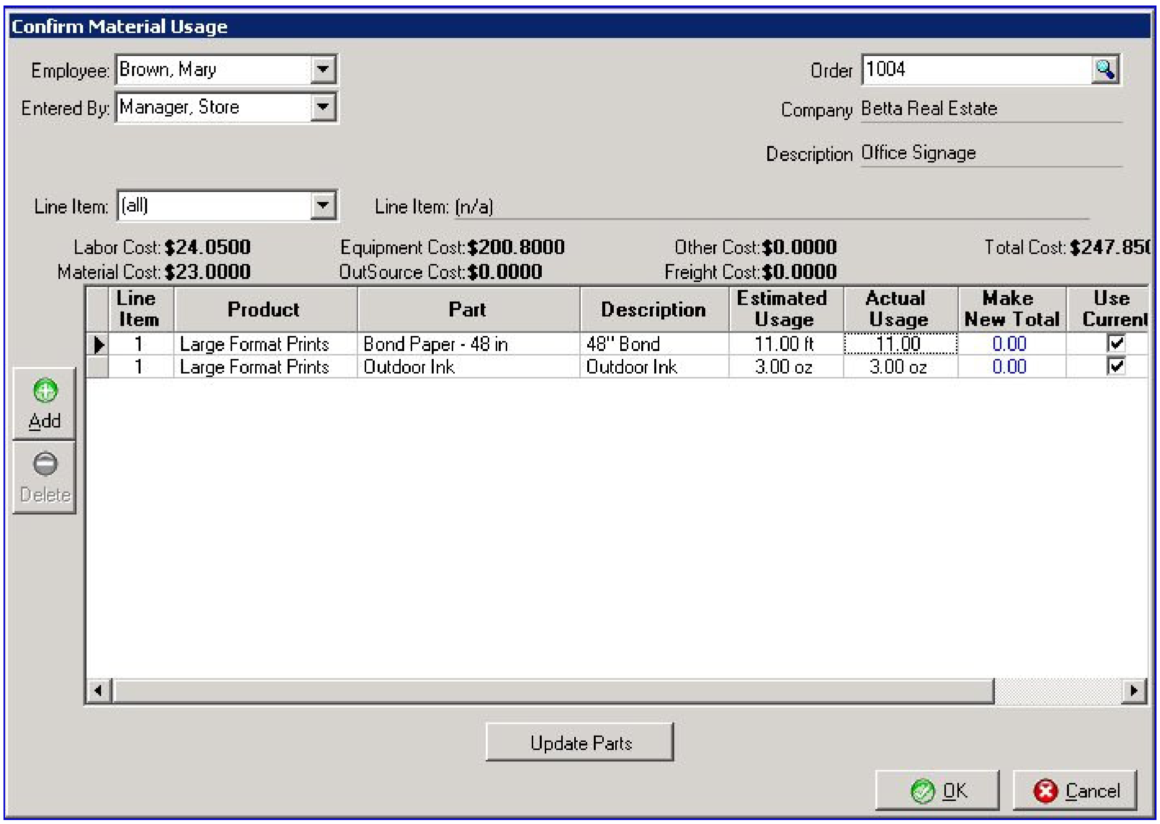


Figure 13-27 Confirm Material Usage Screen

Use this screen to confirm how much material you are using for a particular project. This allows managers to verify if material amounts for a project are running higher than usual.

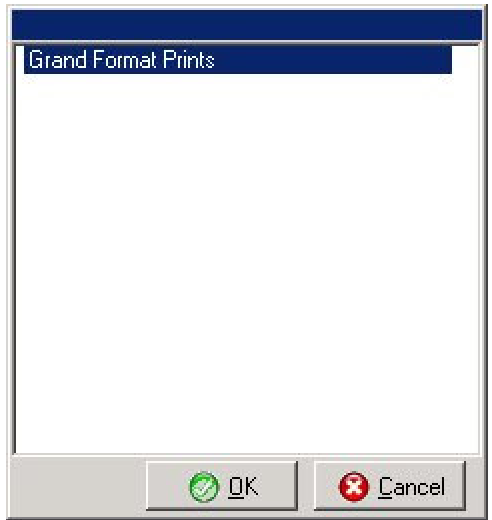


Figure 13-28 Add Line Item Option

Material Usage …

VIEW WORK HISTORY

Main Toolbar | Production Home | View Work History

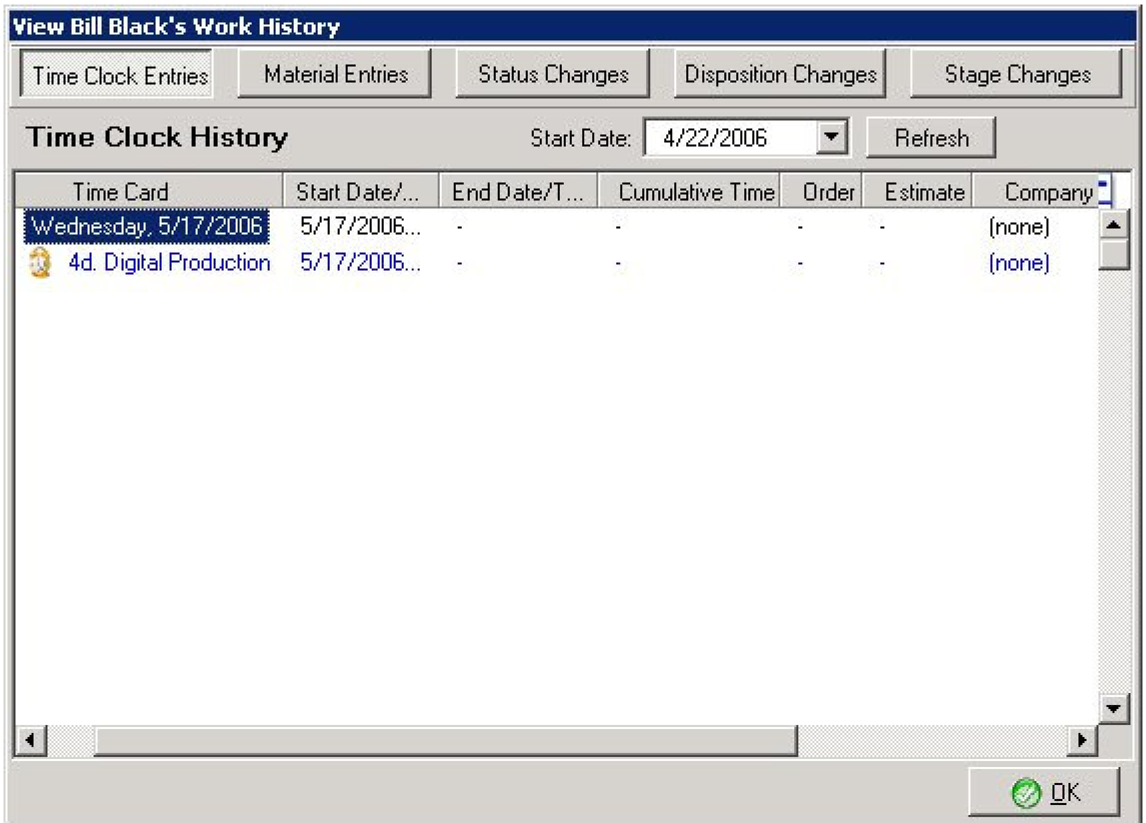


Figure 13-29 View Work History Screen

The User can access their work history here. They can view specific information about materials used, status changes, disposition changes, and stage changes.

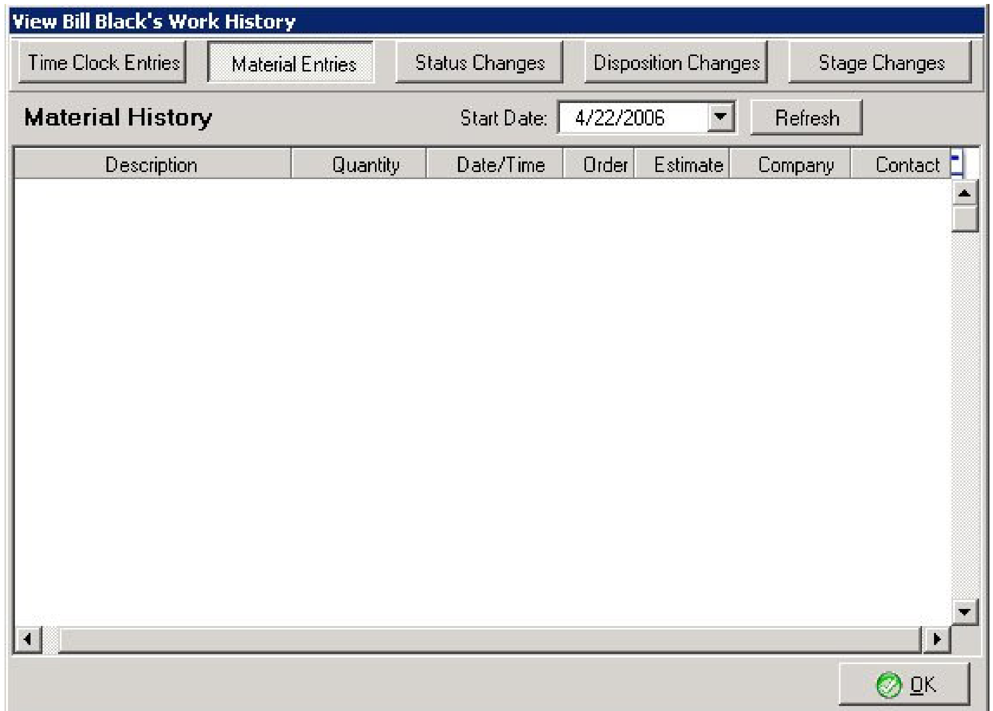


Figure 13-30 Employee Work History - Material History

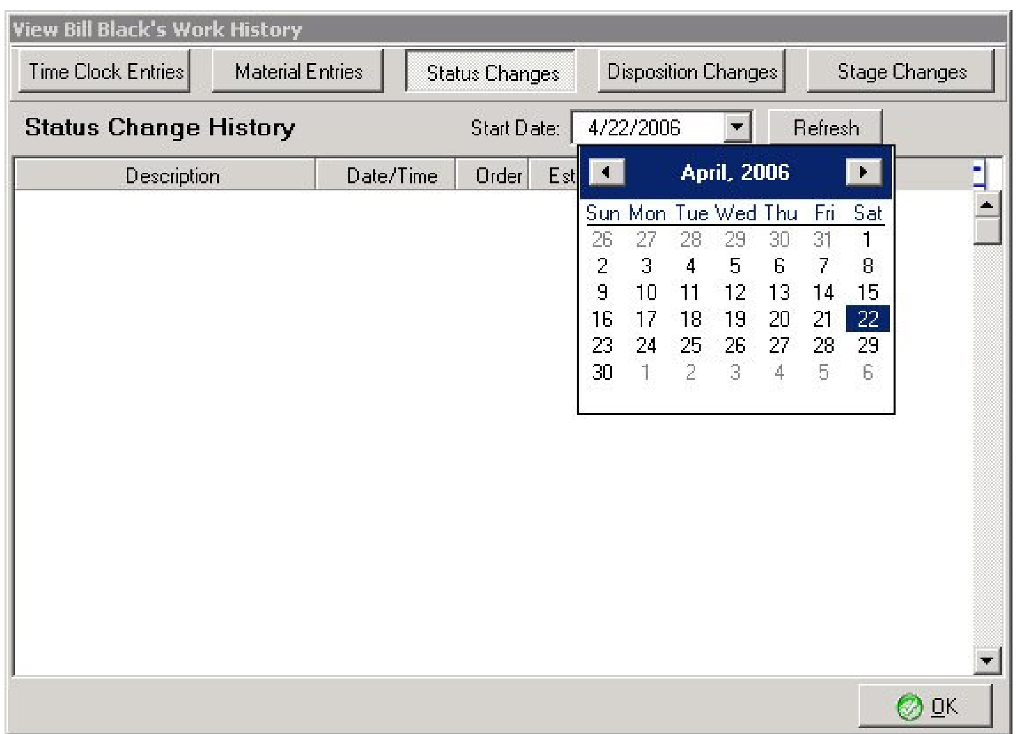


Figure 13-31 Employee Work History - Status Change History

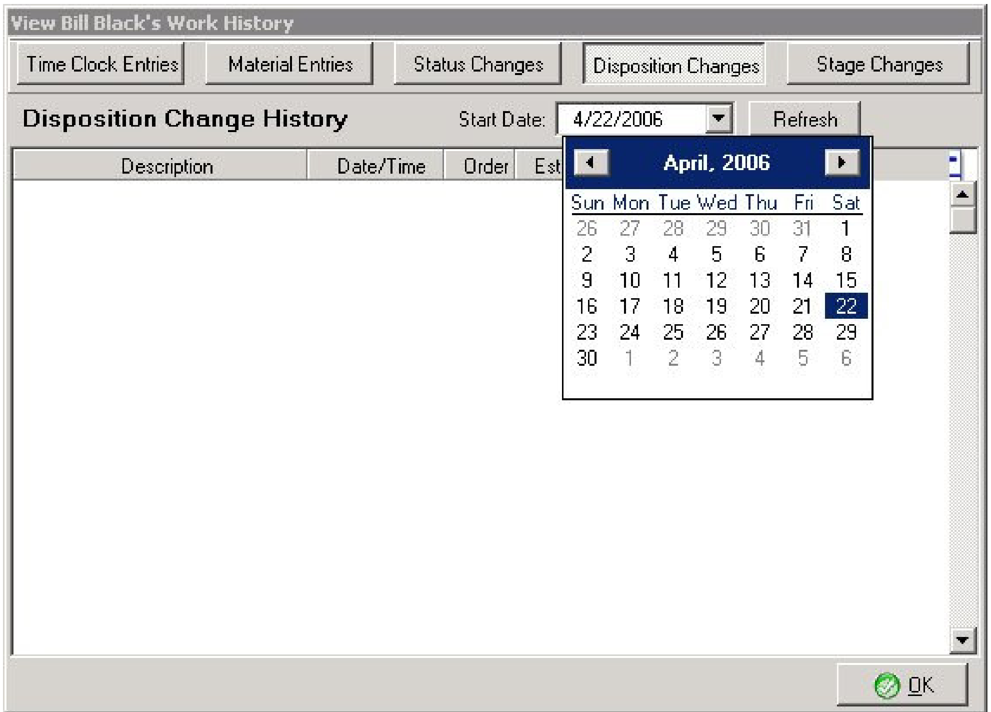


Figure 13-32 Employee Work History - Disposition Change History

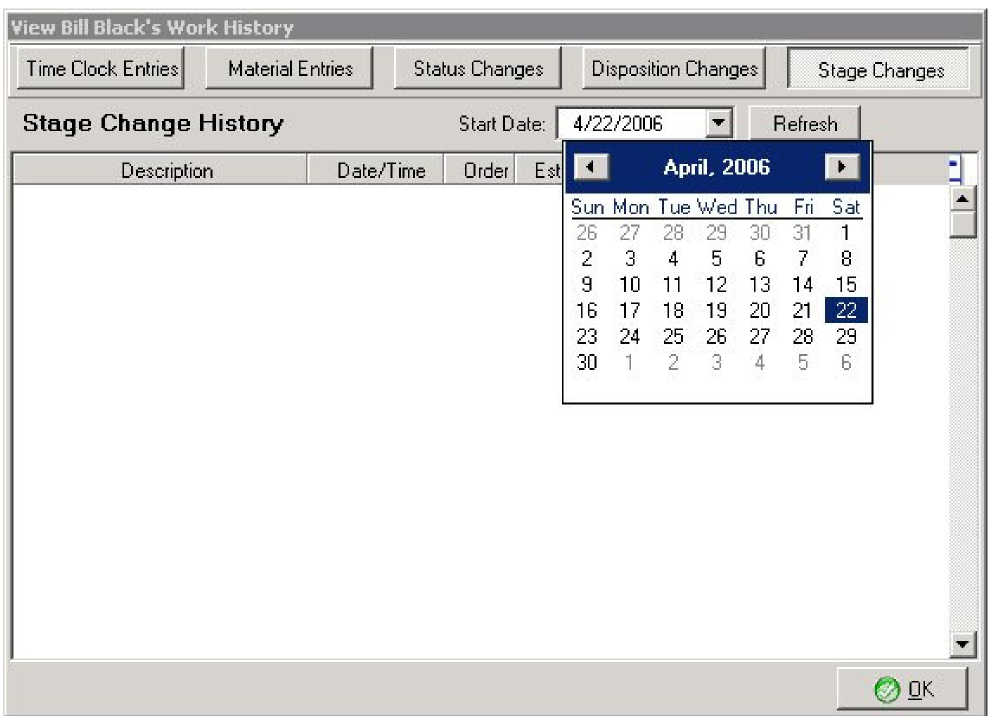
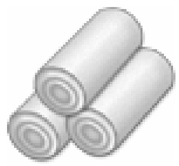


Figure 13-33 Employee Work History - Stage Change History

USE MATERIAL



Main Toolbar | Production Home | Use Material

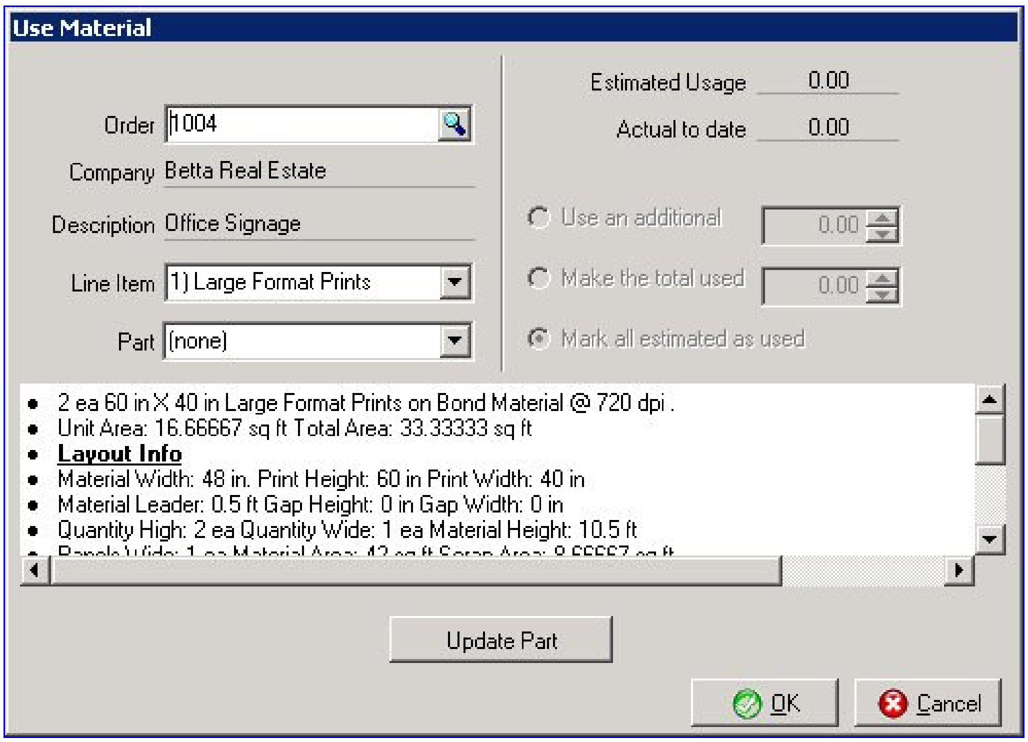


Figure 13-34 Use Material Screen- No Parts Selected

Use this screen to add a material to a previously entered order.

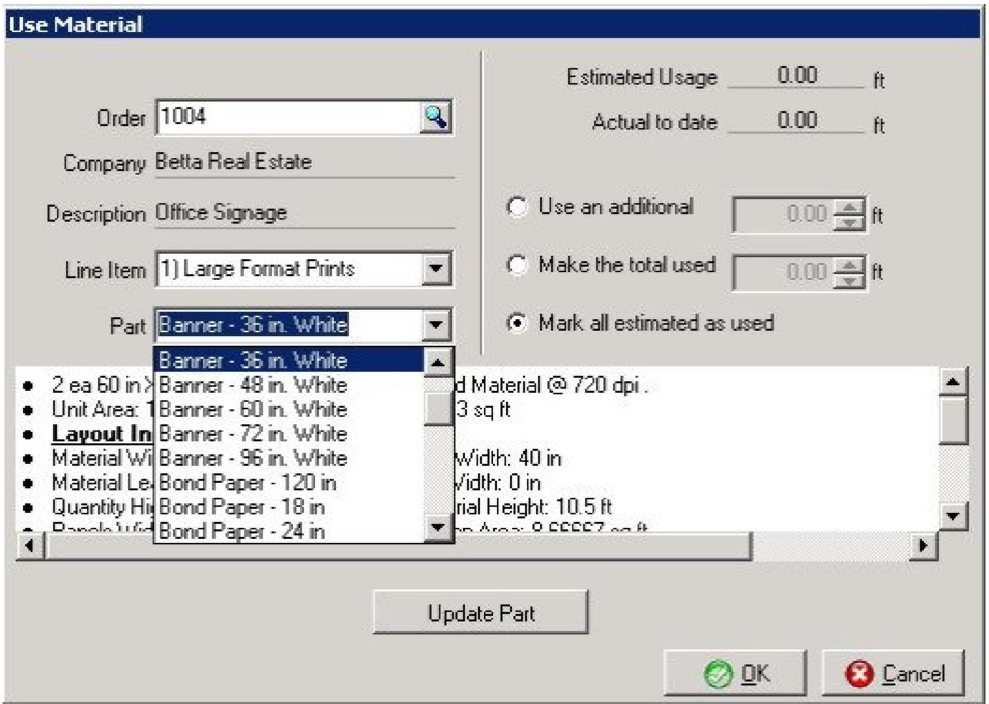


Figure 13-35 Part Selection - Drop-down list

Update Part

Line Item

EFFECTIVE USE

The Production home page is a one-stop venue for everything a shop employee needs to work efficiently. They can monitor how they are distributing time and take note if there is anything that needs to be changed.

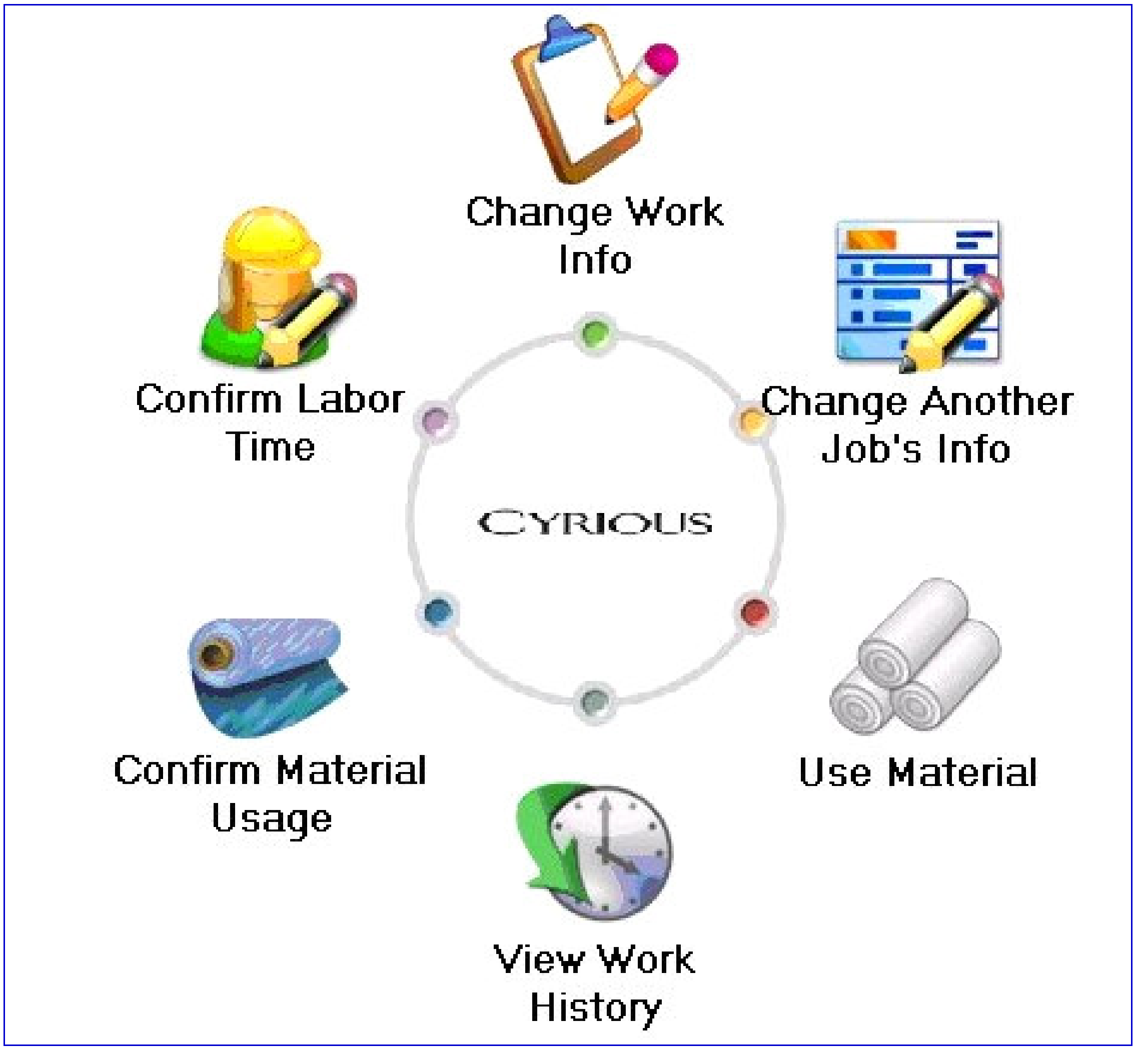


Figure 13-36 The Production Home Screen Icons

There are many standard reports in Control …

14 : MARKETING

CONCEPT

The Marketing tools in Control make your salespersons' jobs as easy as possible. Here, they can access everything they need to help your shop remain competitive.

SCREENS

Main Toolbar | Marketing Home

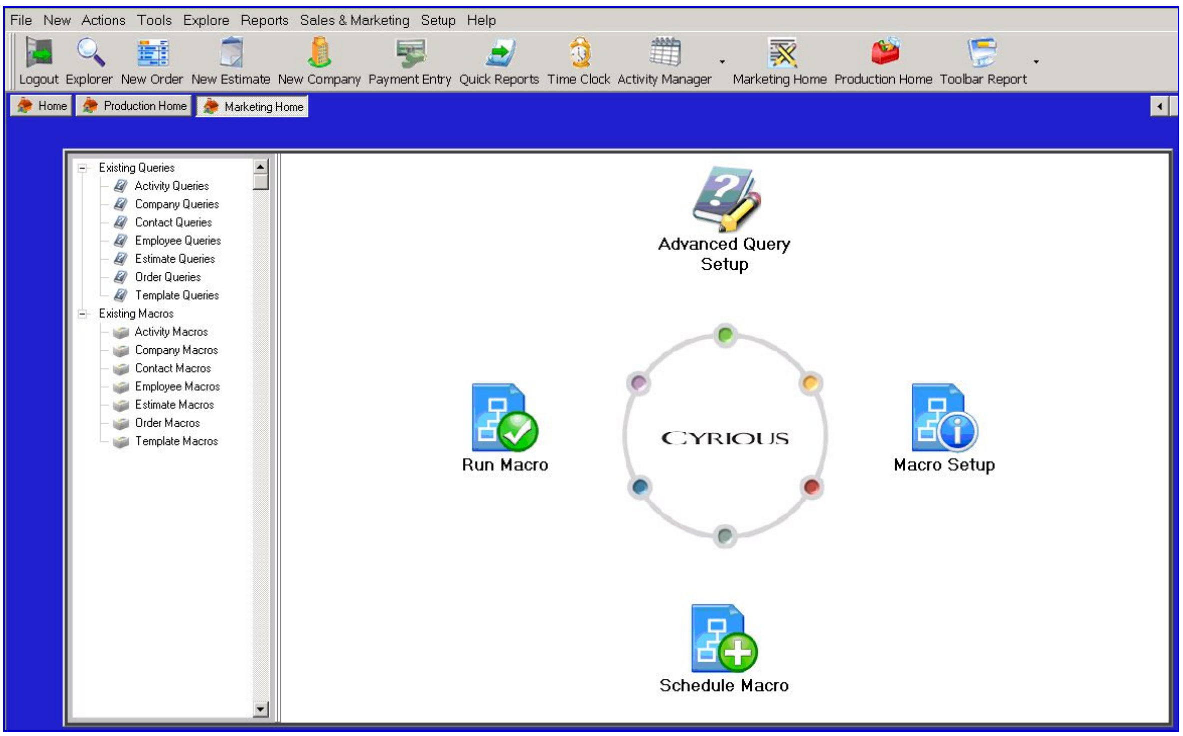


Figure 14-1 Marketing Home Screen

Marketing is a vital part of any business and the …

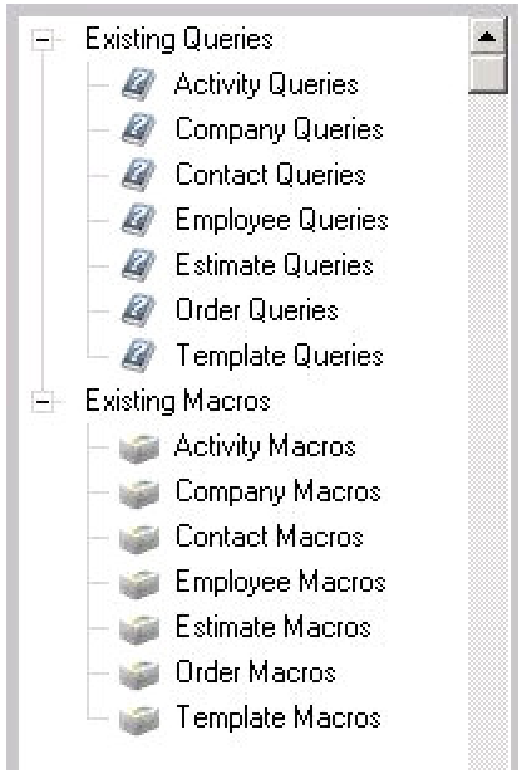


Figure 14-2 Marketing Home Screen Sidebar

Macro Setup

Run Macro

Schedule Macro

Advanced Query Setup

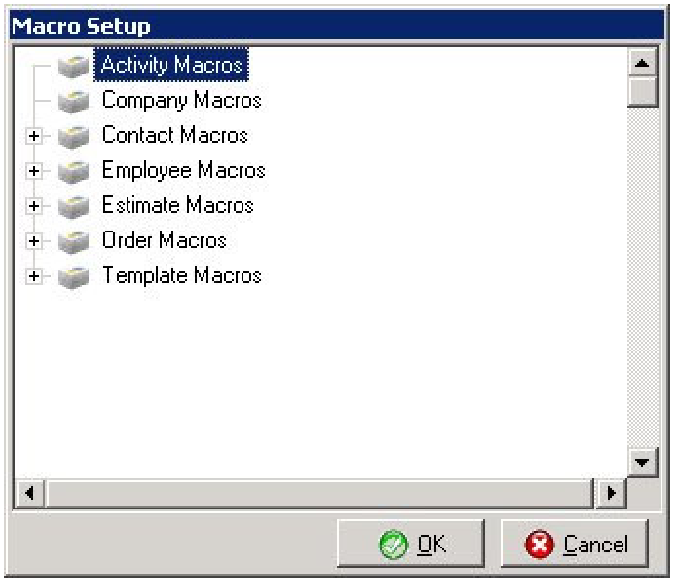
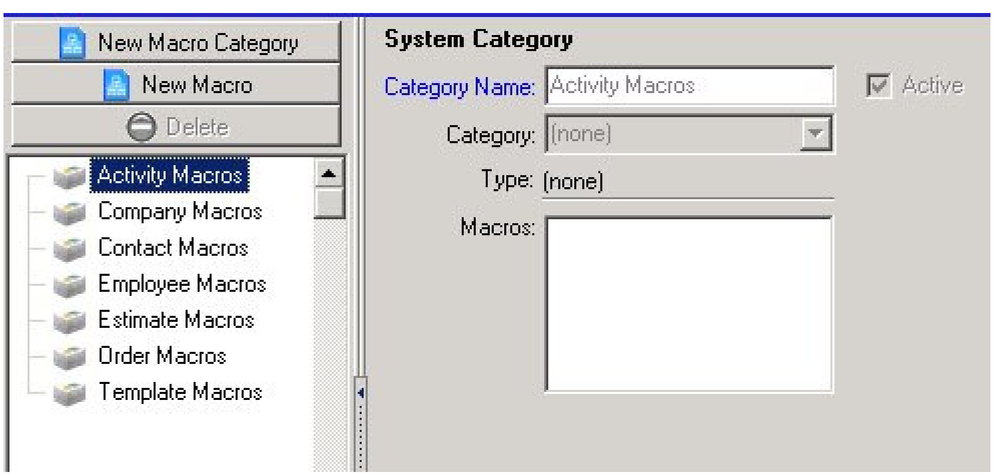


Figure 14-3 Macro Setup Screen

Figure 14-4 Warning - If OK is Clicked and No Macro Has Been Selected



SPECIAL ACTIONS TOOLBAR FUNCTIONS

Figure 14-5 Marketing Screen Actions Menu Options

Close – Closes the Marketing home screen.

MACRO SETUP

Main Toolbar | Marketing Home | Macro Setup

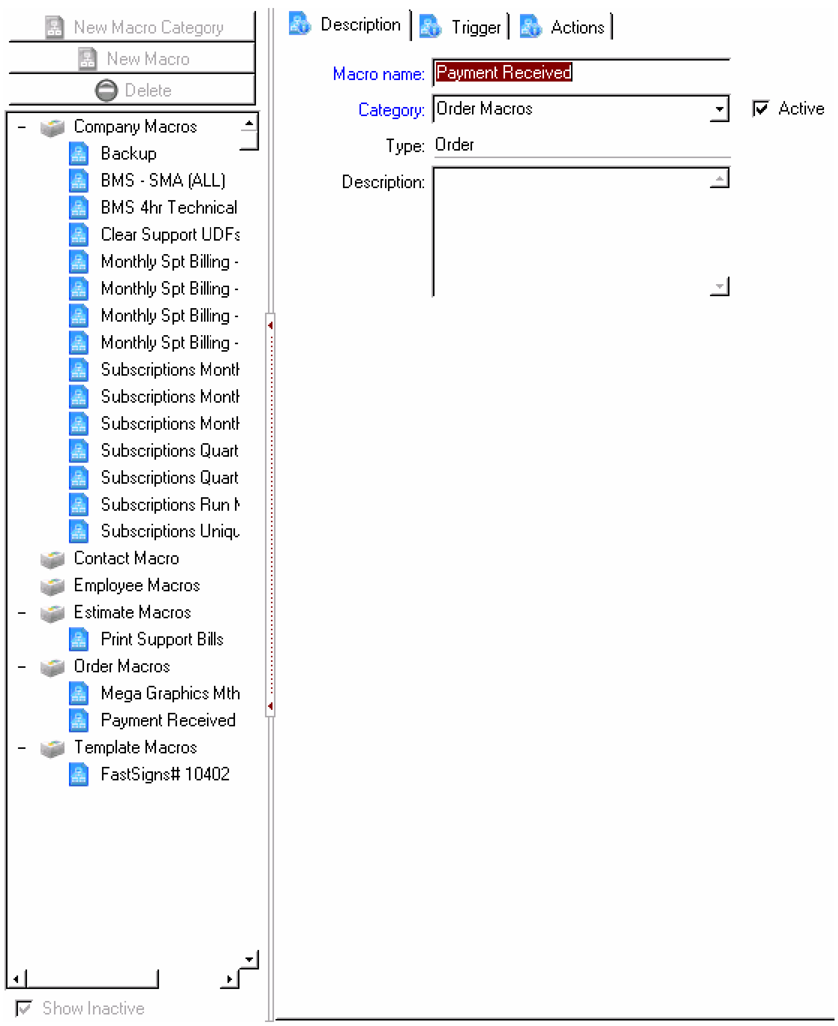


Figure 14-6 Macro Setup Screen

Macros make it easy for your salespersons to stay on top of their prospects. Macros are automated actions Cyrious performs to remind them of potential orders and other updates.

Macros can also be in the form of message windows that pop up whenever a specific action occurs.

One macro most Users like to have is a message box confirming that the User wishes to save changes to or delete a record. Our example above is a macro set up to notify the User when a payment is successfully processed.

SPECIAL ACTIONS TOOLBAR FUNCTIONS

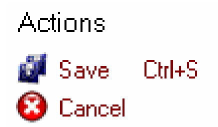


Figure 14-7 Macro Setup Screen Actions Menu Options

Close – Closes the Macro Setup screen.

DESCRIPTION TAB

Main Toolbar | Marketing Home | Macro Setup | New Marco | Description Tab

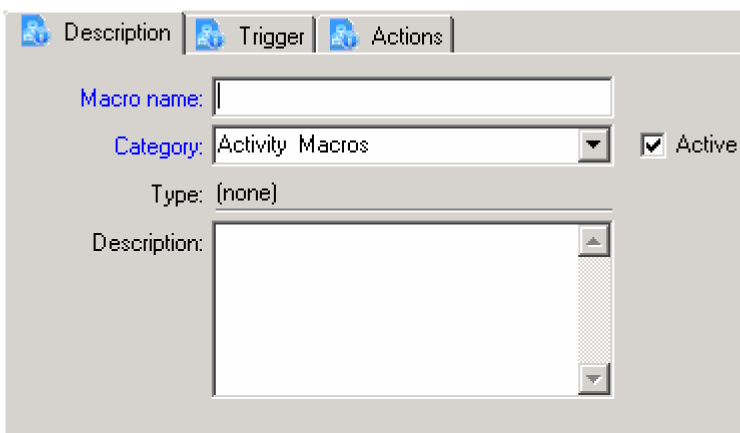


Figure 14-8 Macro Setup Screen Description Tab

Macro Name	Enter a name for the newly created macro.
Category	Choose a category for the newly created macro.
Active	If this box is checked, the macro is active.
Type	Displays the type of macro.
Description	Enter a description for the macro.

Detailed descriptions are best. They will help you keep better track of your work later.

TRIGGER TAB

Main Toolbar | Marketing Home | Macro Setup | New Marco | Trigger Tab

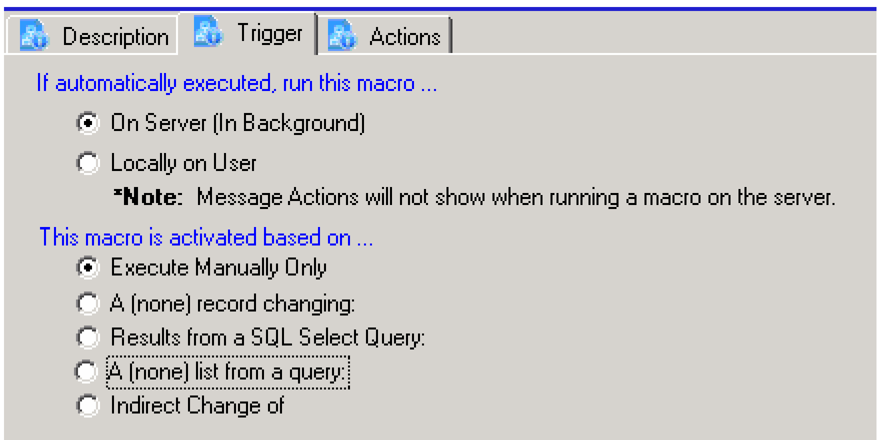


Figure 14-9 Macro Setup Screen Trigger Tab

If automatically executed, run this macro …

Choose whether to run this macro for all on the network or only for the User who created it.

This macro is activated based on …

Choose whether to activate the macro manually, or when a company's record changes.

Use Saved Query

If selected, select the Company from the box below.

ACTIONS TAB

Main Toolbar | Marketing Home | Macro Setup | New Marco | Actions Tab

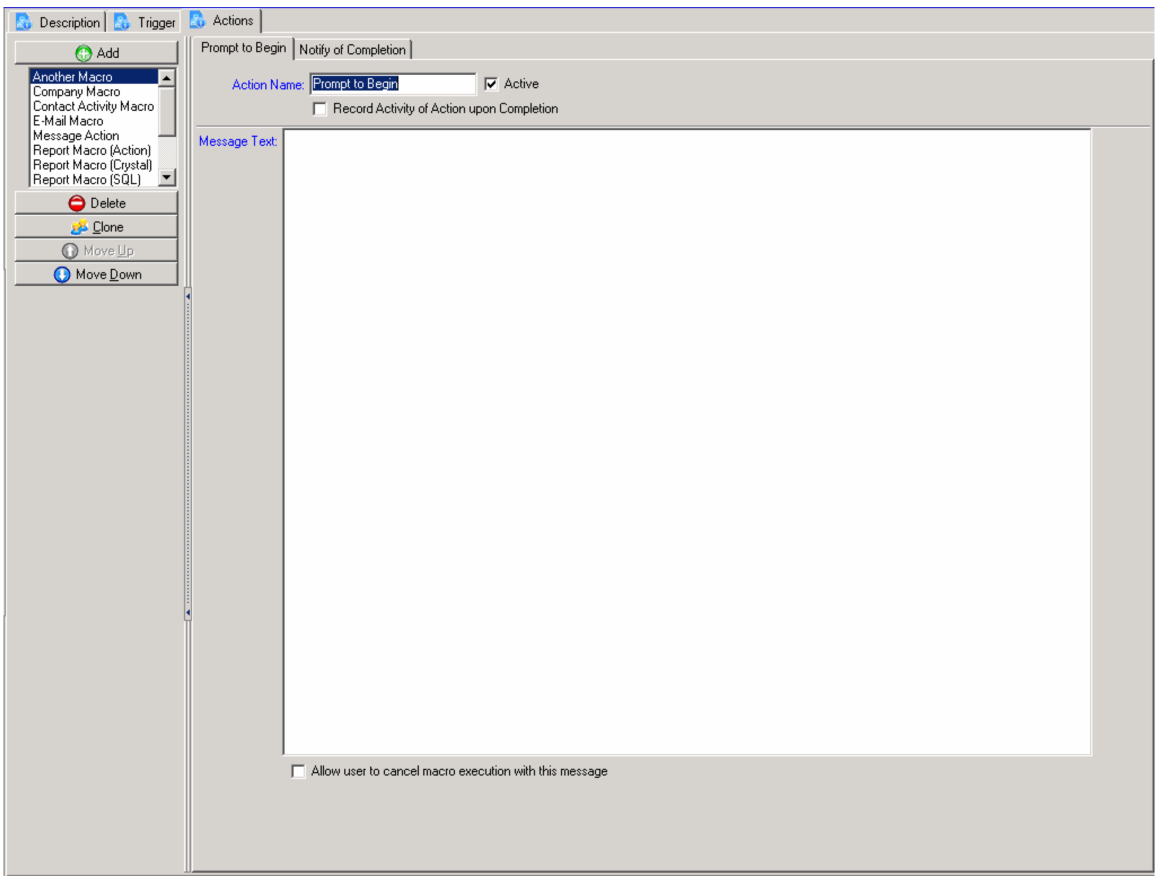


Figure 14-10 Macro Setup Screen Actions Tab

Action Name Enter a name for the new action.

Active If this box is checked, the action is active.

Record Activity of Action upon Completion

If this box is checked, each time the action is completed, an activity will be added to the User's calendar.

Message Text Enter a message that will pop up on the User's screen when the macro runs.

SCHEDULE MACRO

Main Menu | Marketing Home | Schedule Macro

It is not a bad idea to schedule a few daily macros.

Suppose your Accountant is slightly absent-minded. You might want to set up a macro reminding him/her to close out the financials every day at 4:45 PM.

Let us apply this example to the descriptions below.

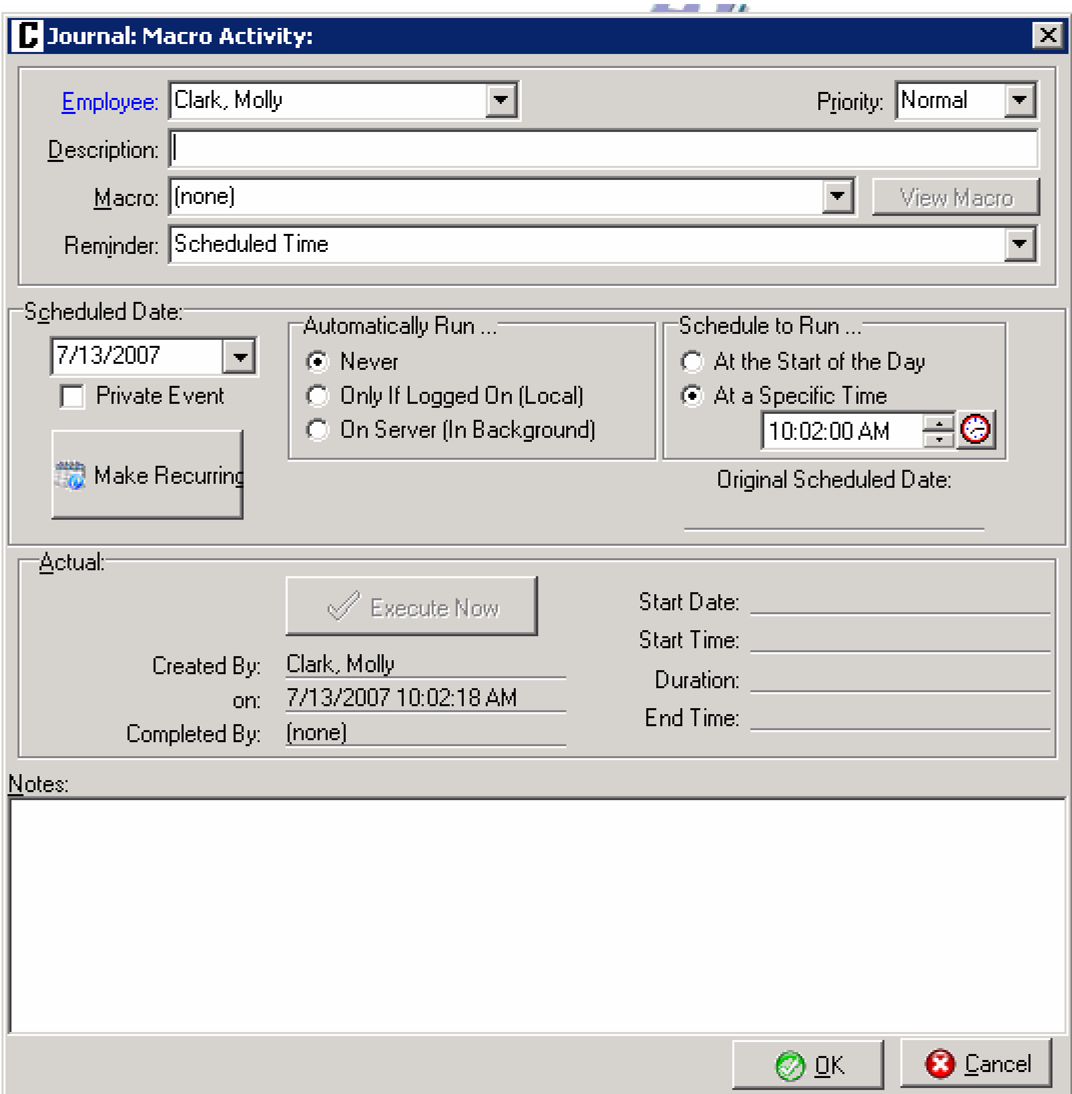


Figure 14-11 Macro Scheduling Dialogue

Employee Select your Accountant's name from the list.

Priority	Designate a priority for the macro. I.e. a priority of Urgent will play a sound and flash a red exclamation mark. A priority of Normal will show a typical Windows message box.
Description	Enter a description for the macro. In this case, you would put something like "Perform Daily Close Out".
Macro	Select the macro you want to run.
View Macro	After you have selected an item from the list, click on **View Macro** to play it. This ensures you have selected the right one.
Reminder	You can set a reminder for this macro if desired. In this case, you would select **Scheduled Time**.
Scheduled Date	Begin the macro today.
Private Event	If it a private event, the reminder will only appear on your Accountant's screen. However, the activity will still show in his/her Activity Manager for others to see.
Make Recurring	Click this button to make the item repeat. Choose to make this one every day, Monday through Friday.
Automatically Run …	We want our accountant to close out every day, so we will select **Only if Logged On**.
Schedule to Run …	As mentioned above, we want the Accountant to close out every day at 4:45 PM. This is where you would enter that time.
Original Scheduled Date	Displays the first date for which the event was scheduled.
Actual	Displays unchangeable information pertaining to the item.
Notes	Other specific information about the macro.

RUN MACRO

Main Menu | Marketing Home | Run Macro

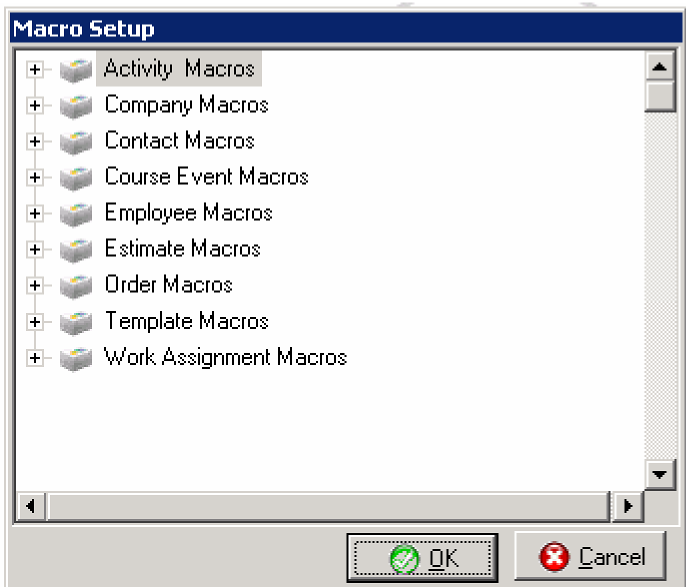


Figure 14-12 Run Macro Pop Up Window

This is a pop up screen. You can select a macro to run manually.

ADVANCED QUERY SETUP

Main Toolbar | Marketing Home | Advanced Query Setup

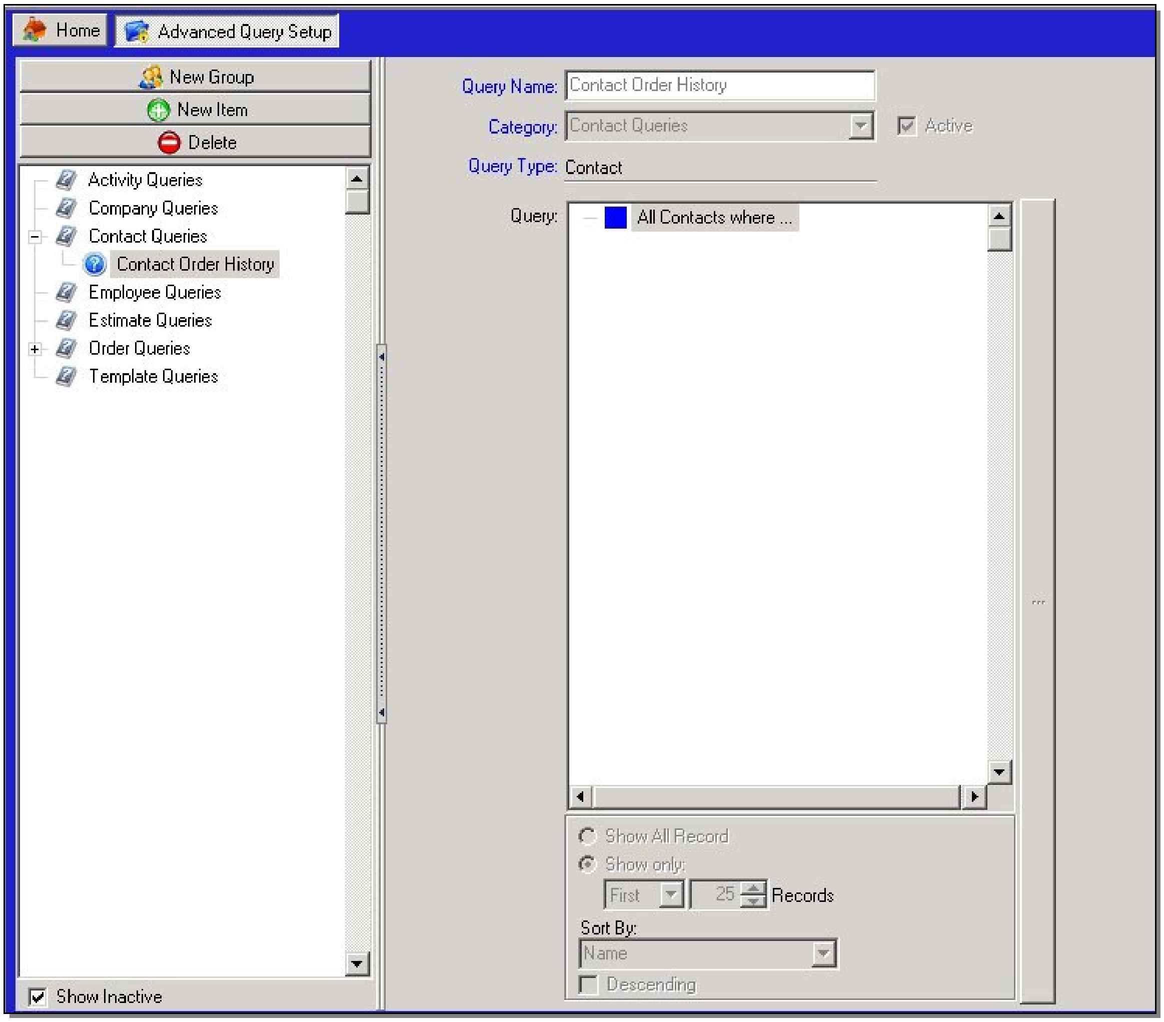


Figure 14-13 Advanced Query Setup Screen

Clicking the button to the right of the selection box will bring up an existing advanced query.

Figure 14-14 Select an Existing Advanced Query

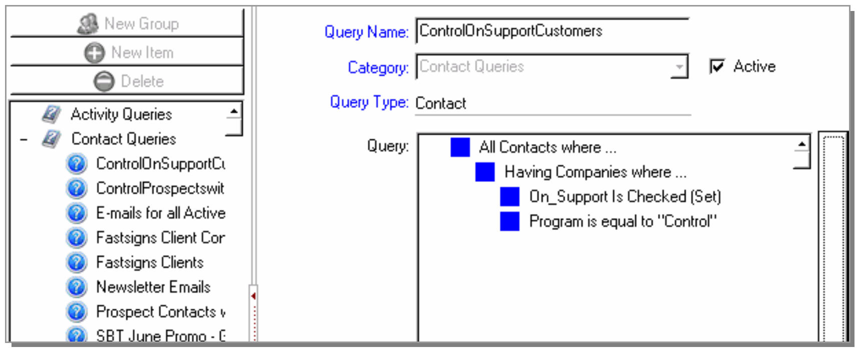


Figure 14-15 Advanced Query Example

The example shown …

ADVANCED QUERY SELECTION CRITERIA SCREEN

Main Toolbar | Marketing Home | Advanced Query Setup | Right Ellipsis Button

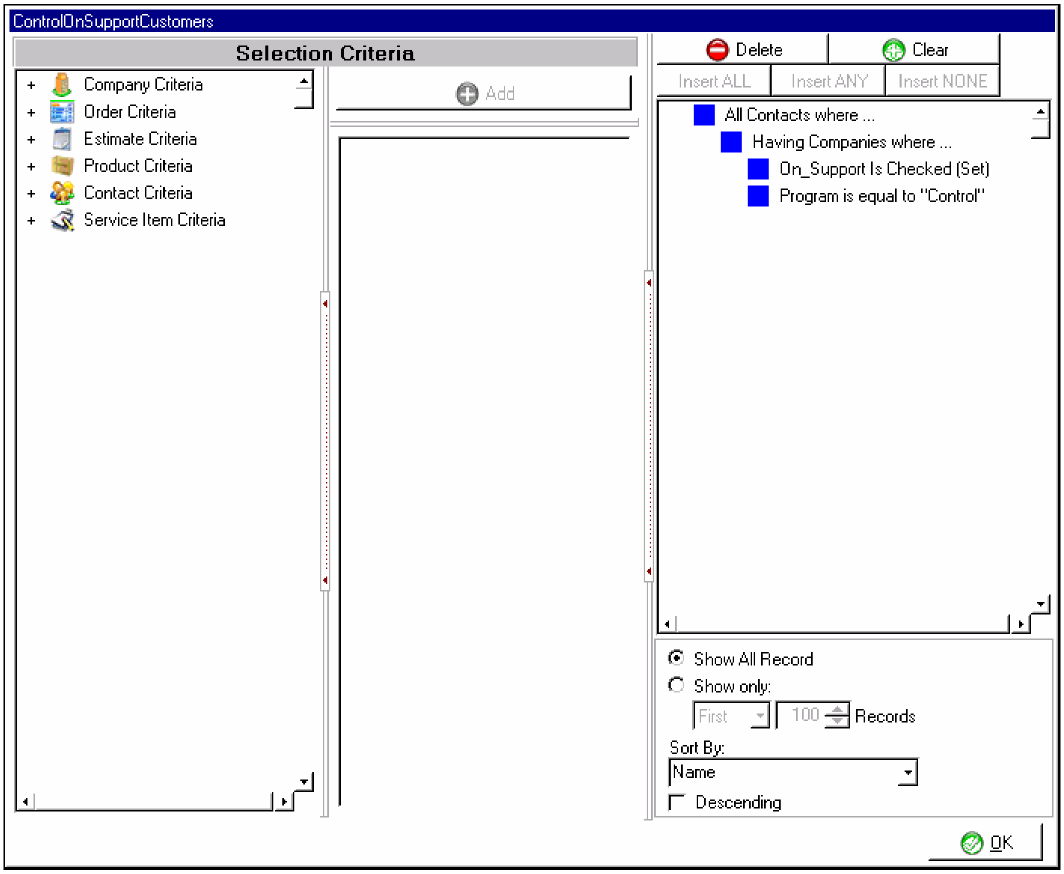


Figure 14-16 Advanced Query Selection Criteria Screen

More detail …

Special Actions Toolbar Functions

Figure 14-17 Advanced Query - Actions Menu Options

New Group	Creates a new group.
Save	Saves the current information
Clear	
Cancel	Cancels the actions and reverts to the previously saved.

More details …

15 : REPORTING

CONCEPT

Cyrious Software's reporting functions are an easy, accurate, reliable way to ensure that your bank receives the correct information in a timely manner. Additionally, reporting serves as a double-check for your own internal accounting purposes.

ACCESSING REPORTS FROM THE MAIN MENU

The main menu is the easiest place to access your reports. The Reports menu expands to show every kind of report you have created and store in your system. This makes reports instantly accessible when you need them most – on our way out the door for a meeting, when it's 4:59 PM and you need to close the shop, and when your Executive Accountant at Headquarters needs your state sales tax report faxed over immediately.

REPORTS SUB MENUS

ACCOUNTING REPORTS SUB MENU

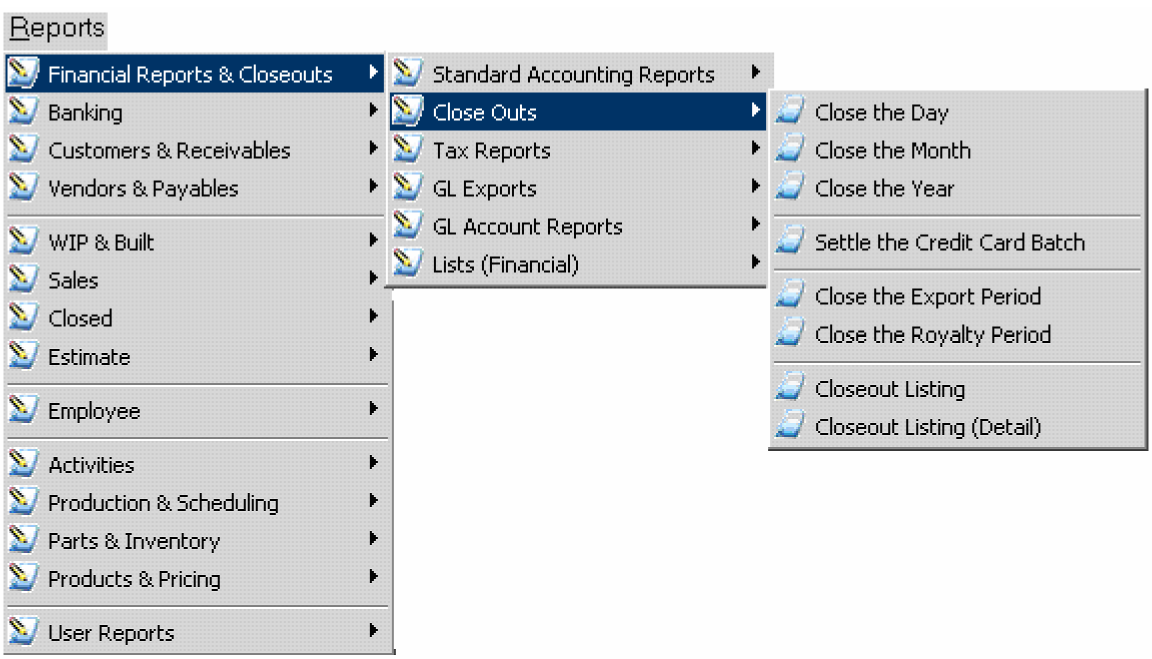


Figure 15-1 Reports Menu Accounting Reports Options

Close Outs	Expands to grant access to daily, monthly, and yearly close out reports; royalty and export reports; credit card settlement report; and close out listing reports with and without detail.
GL Export	Expands to grant access to QuickBooks, MYOB, Simply Accounting, DacEasy, Peachtree, Generic, and Small Business Financial close out reports.

A/R Reports	Expands to grant access to detailed summary, summary by primary salesperson, summary by Entered By, and WIP summary close out reports.
Statements	Expands to grant access to close out reports showing all due invoices and invoices due from the past 0-30, 31-60, 61-90, and 90+ days.
Sales Tax Reports	Expands to grant access to a summary close out report, a close out listing by tax, and a report on closed orders.
General Ledger	Expands to grant access to detailed, summarized, detailed by order, and Adjusted by Employee close out reports.
Financial Summary	Prints a general financial summary.

CUSTOMER REPORTS SUB MENU

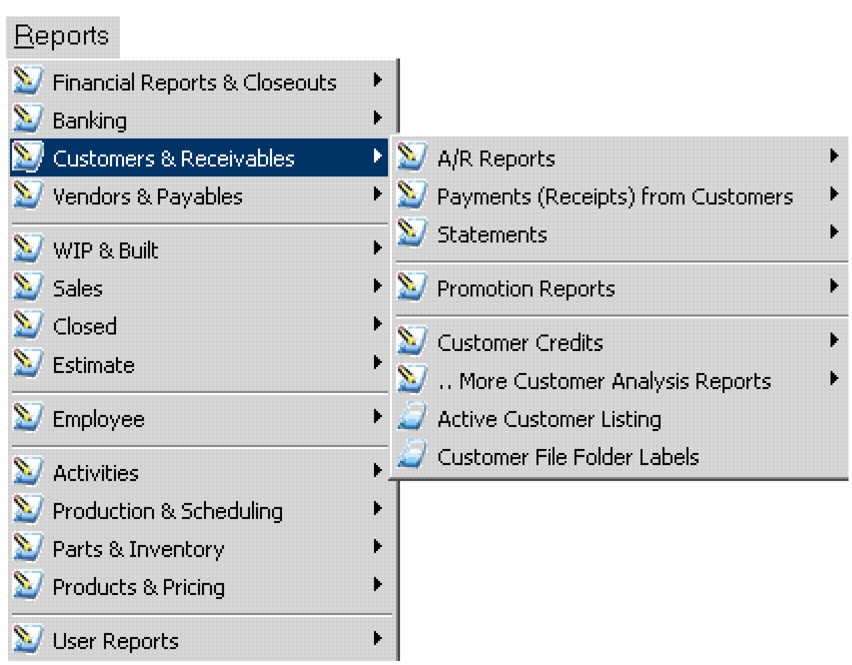


Figure 15-2 Reports Menu Customer Reports Options

Active Customer Listing	Prints a list of all active customers.
Customer by Payment Terms	Prints a list of customers arranged by their method of paying.
Customer Credit Balance	Prints a list of customers with an outstanding balance.
Customer Credit Limit	Reports credit limits for those customers who have open accounts.
Customer Listing by Primary	Prints a list of each customer arranged by his or her

Salesperson assigned primary salesperson.

ESTIMATE REPORTS SUB MENU

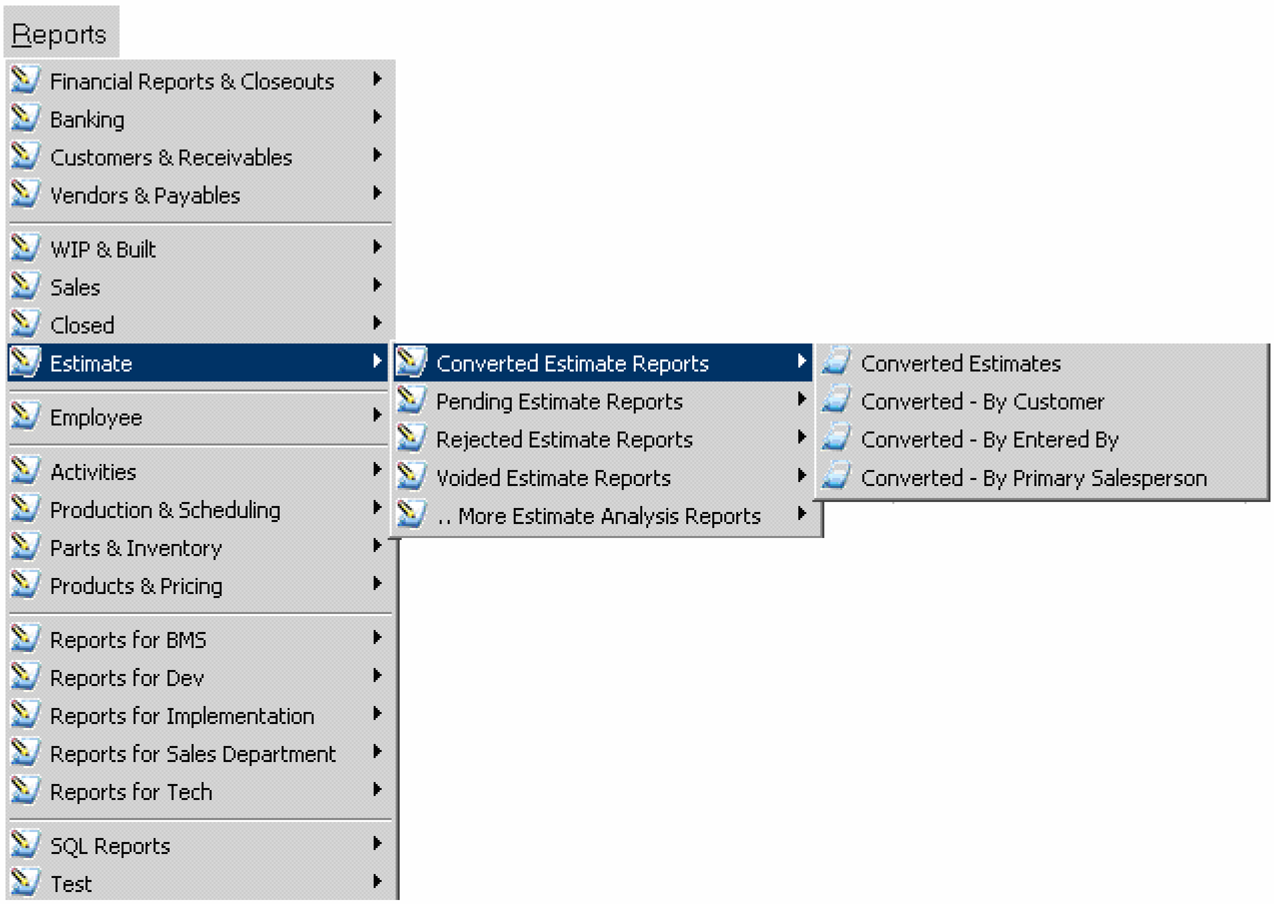


Figure 15-3 Reports Menu Estimate Reports Options

Among the many reports available from this menu are reports focused on:

- Converted estimates
- Pending estimates
- Rejected estimates
- Voided estimates

More detail …

ORDER STATUS REPORTS SUB MENU

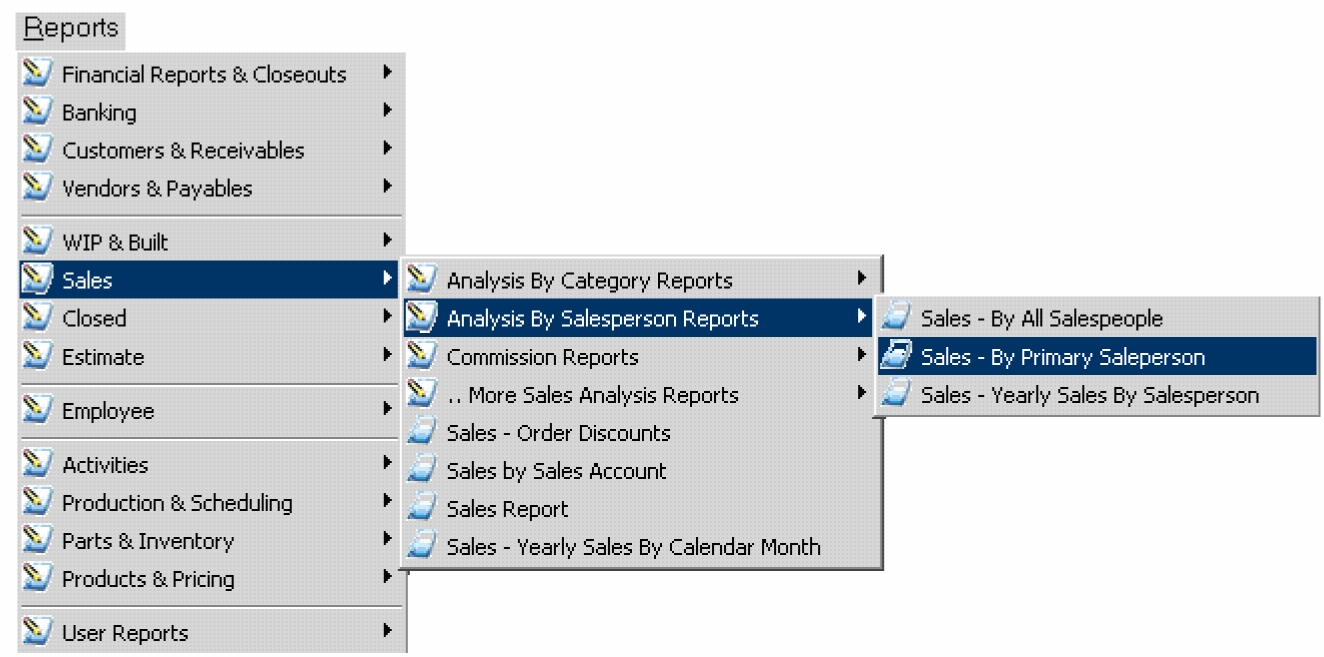


Figure 15-4 Reports Menu Order Status Reports Options

Among the many reports available from this menu are reports focused on:

- Placed reports
- WIP reports
- Built reports
- Closed reports
- Voided reports
- By Entered By
- By primary salesperson

More detail …

PAYMENT REPORTS SUB MENU

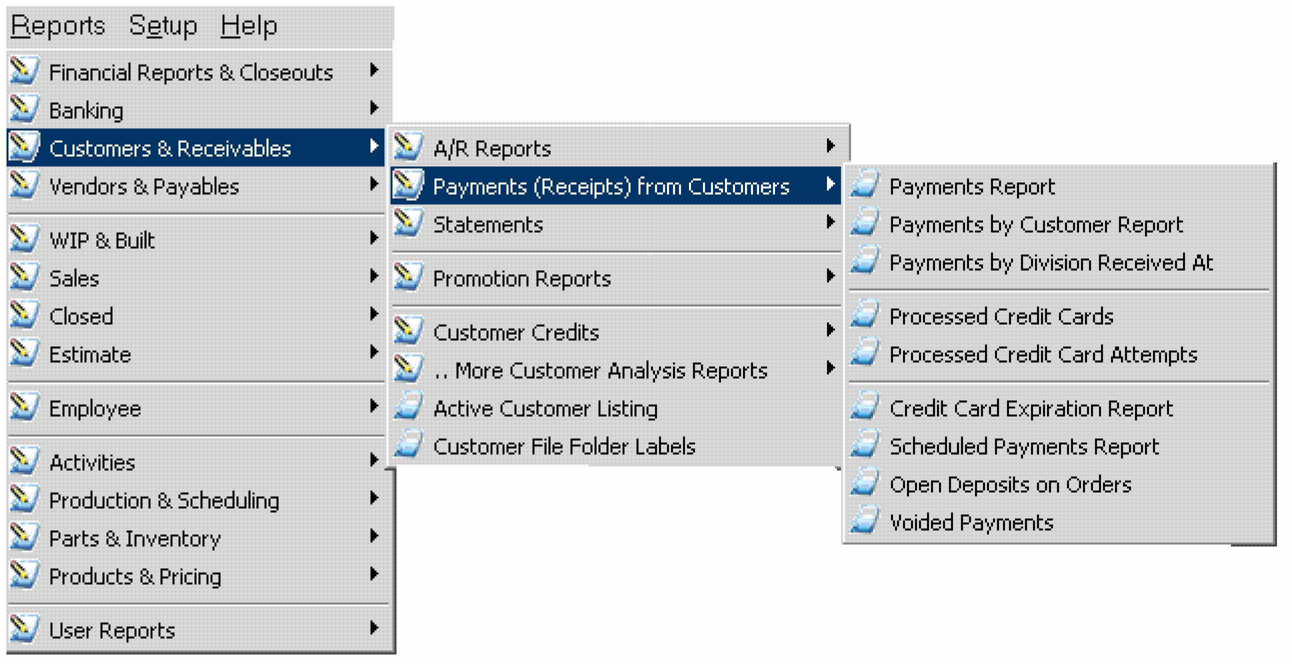


Figure 15-5 Reports Menu Payment Reports Options

Payments Report	Lists all payments for the day.
Order Deposits	Lists deposits customers have made on orders.
Credit Applied	Lists credit applied to all customers.
Customer Payments	Lists all customer payment received.
Payments Without Credit	Lists payments made by customers without credit.
Voided Payments	Lists all voided payments.

More detail …

SALES REPORTS SUB MENU

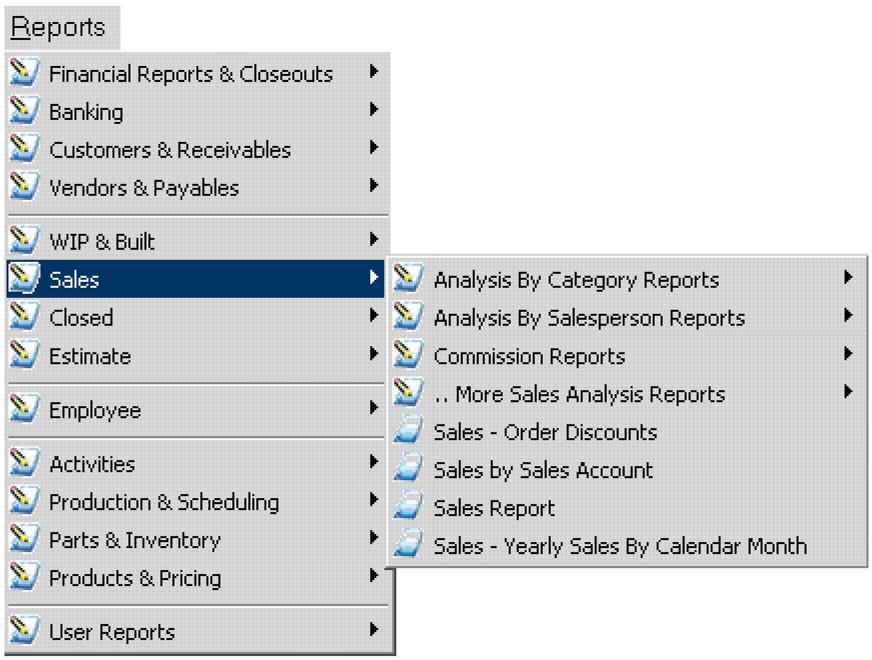


Figure 15-6 Reports Menu Sales Reports Options

By Salesperson	Print a sales report listing by salesperson.
Commissions	Provides options for detailed commission reports.
Sales Report	Print a general sales report.
Sales - Order Discounts	Print a report showing all discounted orders.
Sales - Yearly Sales by Calendar Month	Print a report detailing monthly sales for the past year.

More detail …

ANALYSIS REPORTS SUB MENU

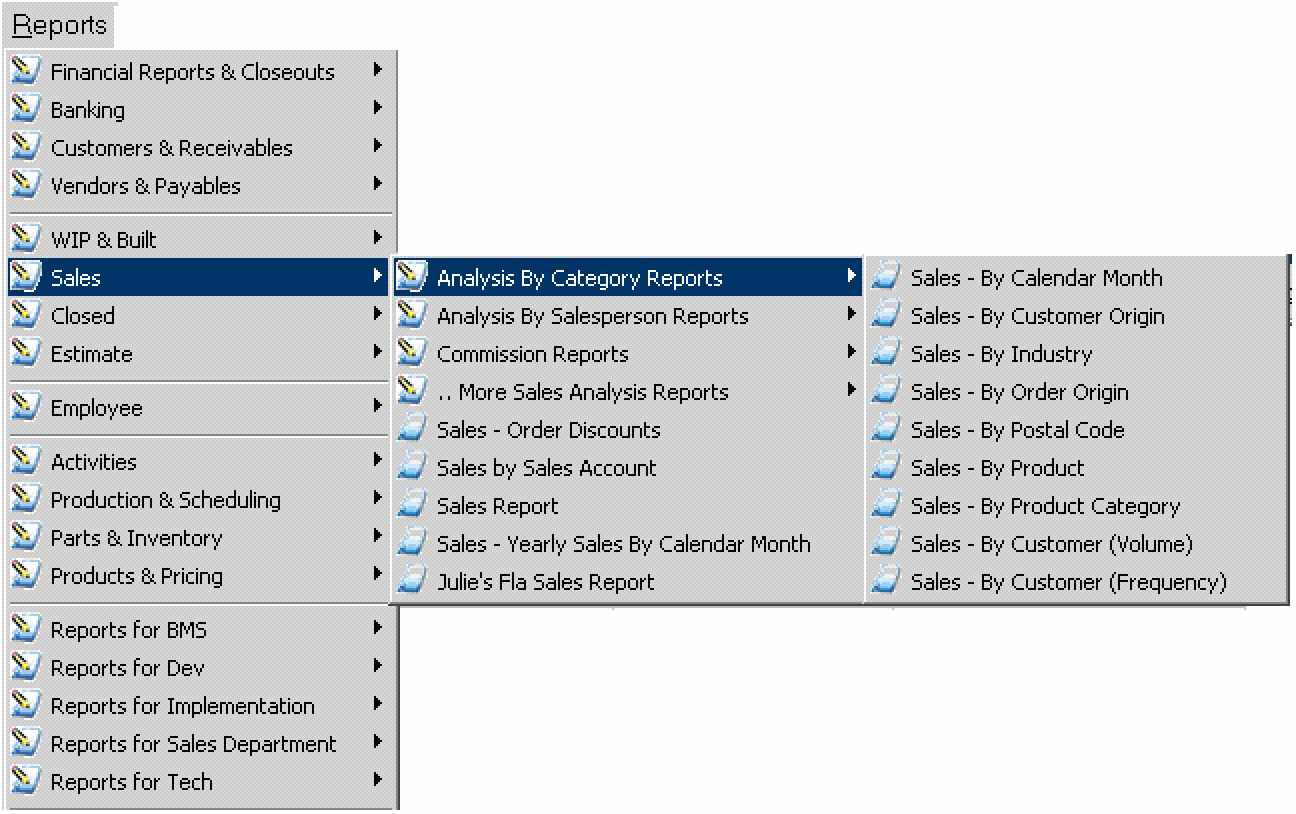


Figure 15-7 Reports Menu Analysis Reports Options

Among the many reports available from this menu are reports focused on:

- Sales by category
- By primary salesperson and product
- Other analysis
- Promotions
- Production

More detail …

EMPLOYEE REPORTS SUB MENU

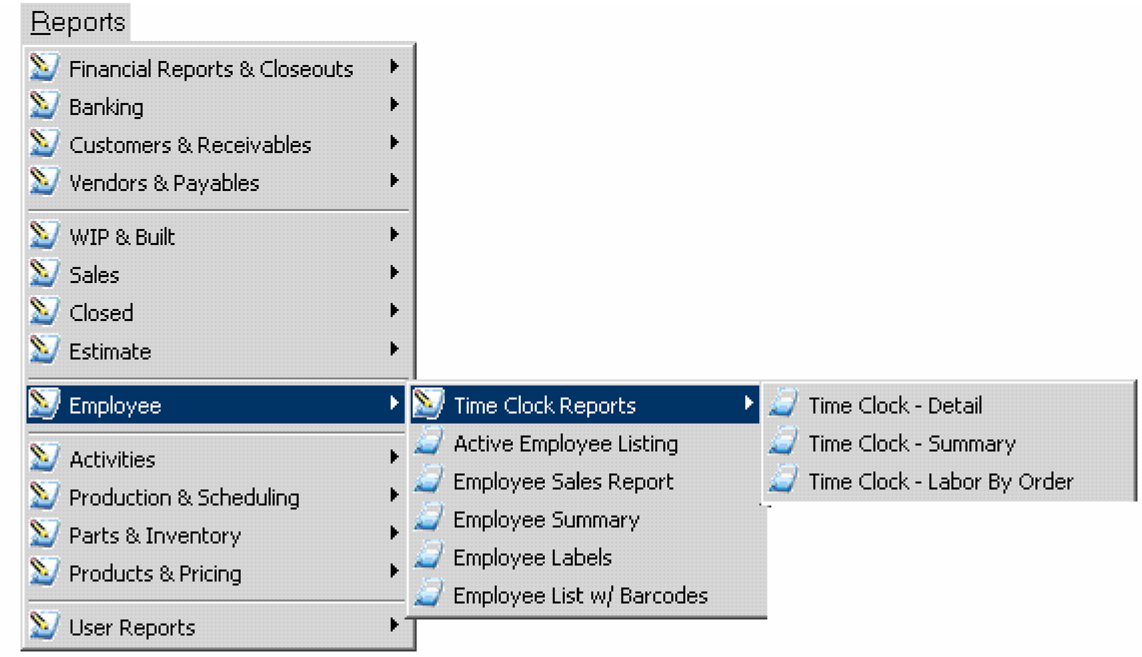


Figure 15-8 Reports Menu Employee Reports Options

Time Clock Reports	Offers various time clock reporting options.
Active Employee Listing	Lists all actively employed personnel.
Employee Summary	Prints an employee summary.
Employee Sales Report	Prints a sales report showing all employees, not just salespersons.

More detail …

PARTS & INVENTORY REPORTS SUB MENU

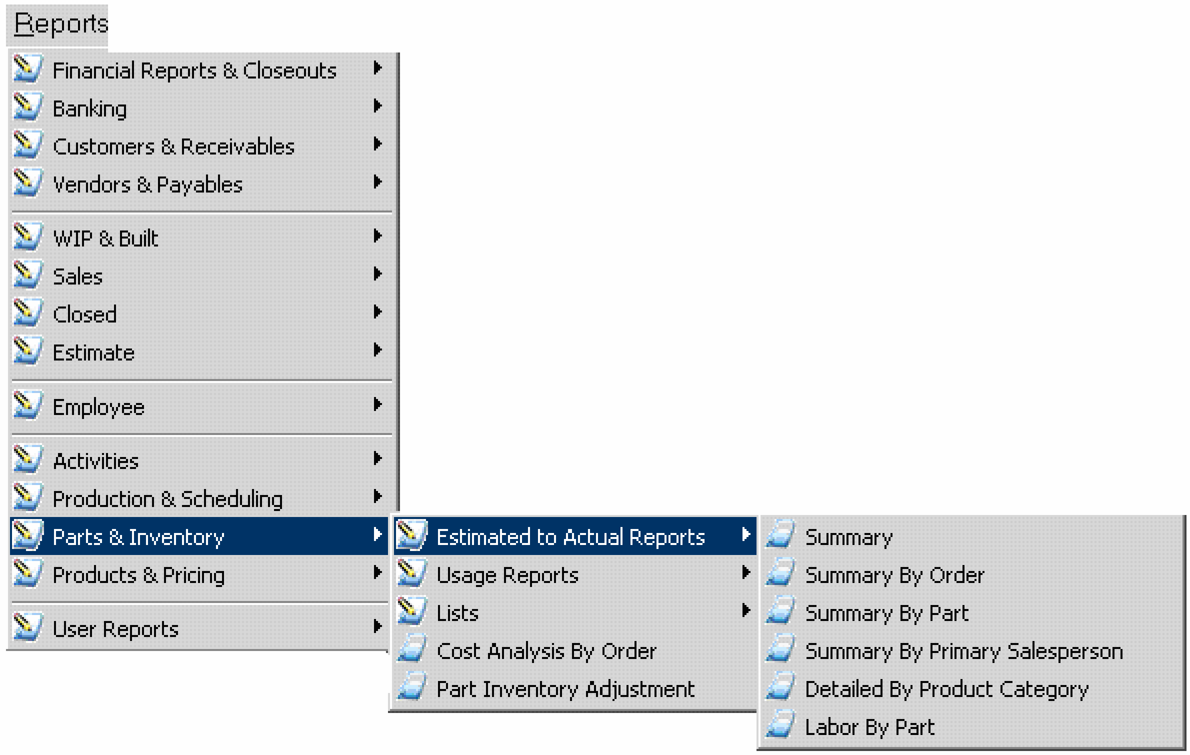


Figure 15-9 Reports Menu Parts & Inventory Reports Options

Among the many reports available from this menu are reports focused on:

- Part usage reports
- Parts Estimated vs Actual
- Part inventory adjustment

More detail …

ACTIVITY REPORTS SUB MENU

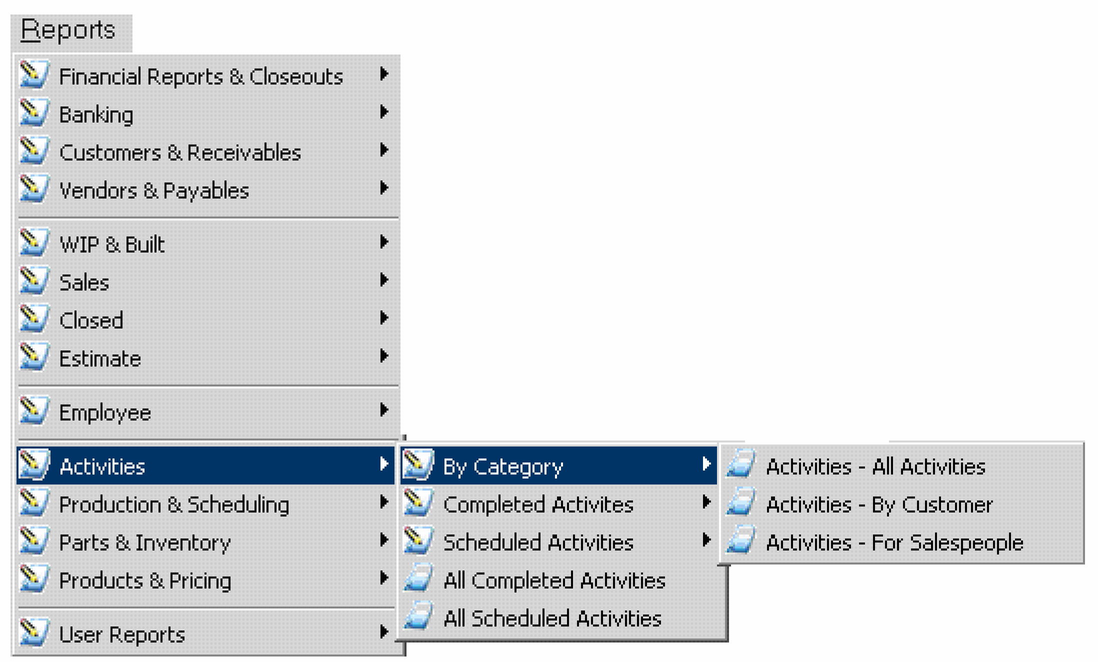


Figure 15-10 Reports Menu Activity Reports Options

Among the many reports available from this menu are reports focused on:

- All scheduled activities
- All completed activities
- By category
- Completed activities
- Scheduled activities

More detail …

SYSTEM INFORMATION SUB MENU

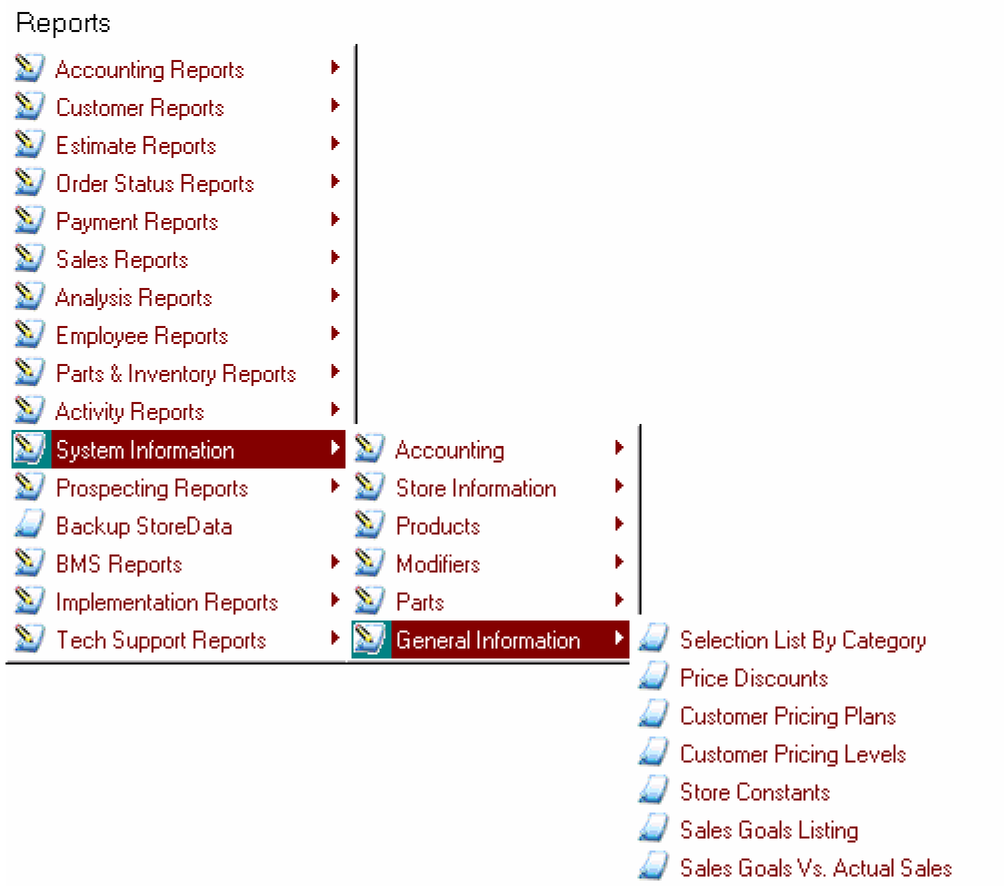


Figure 15-11 Reports Menu System Information Options

Among the many reports available from this menu are reports focused on:

- Accounting
- Store Information
- Products
- Modifiers
- Parts
- General Information

More detail …

PROSPECTING REPORTS SUB MENU

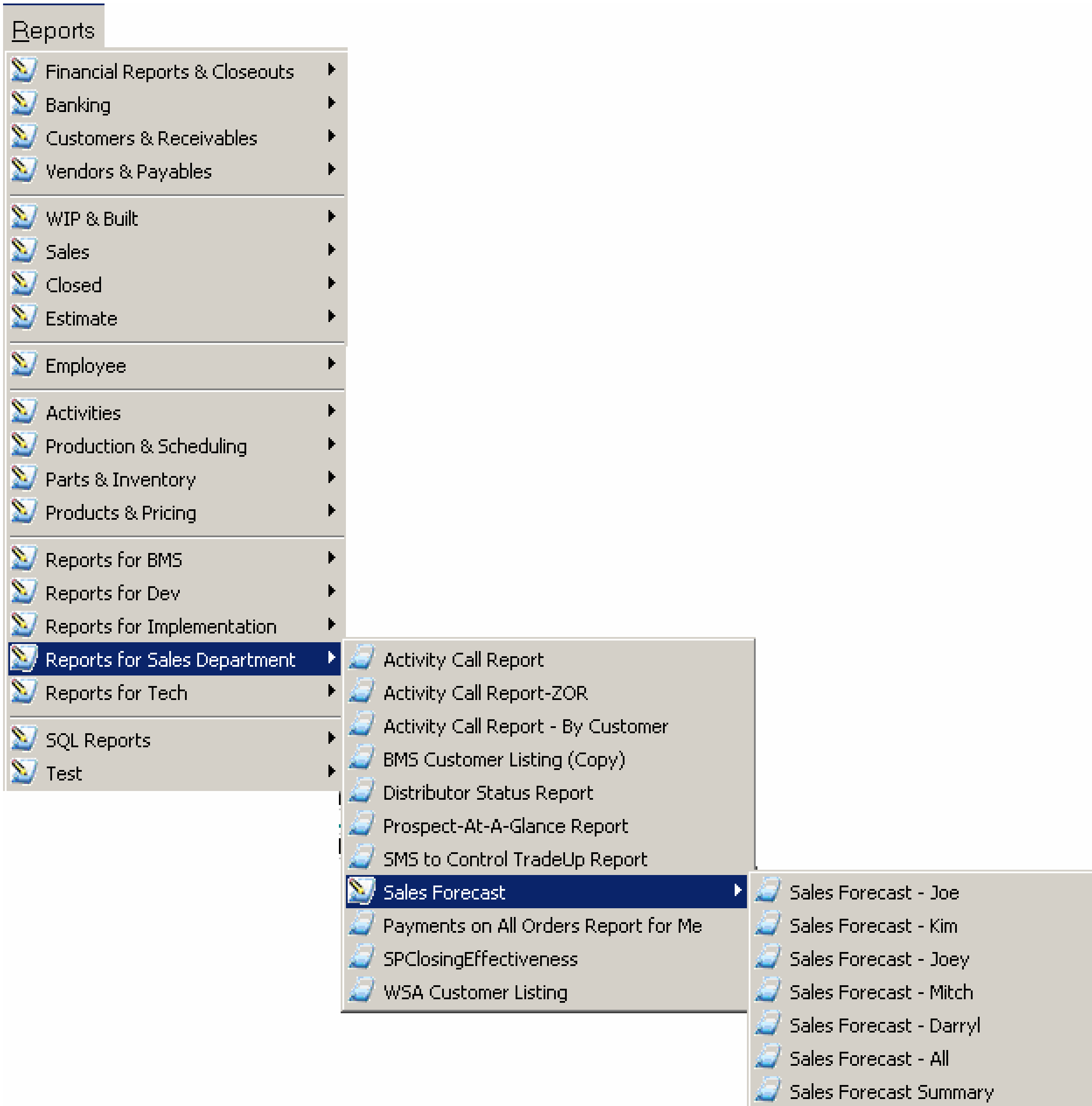


Figure 15-12 Reports Menu Prospecting Reports Options

Among the many reports available from this menu are reports focused on:

- Activity call report
- Activity call report by customer
- Distributor status report
- Prospect-at-a-glance report

- Sales forecast
- Payments on all orders report for me
- Payments on all orders for all

More detail …

MAIN QUICK REPORTS SCREEN

Main Menu | Reports | Quick Reports
Main Toolbar | Quick Reports

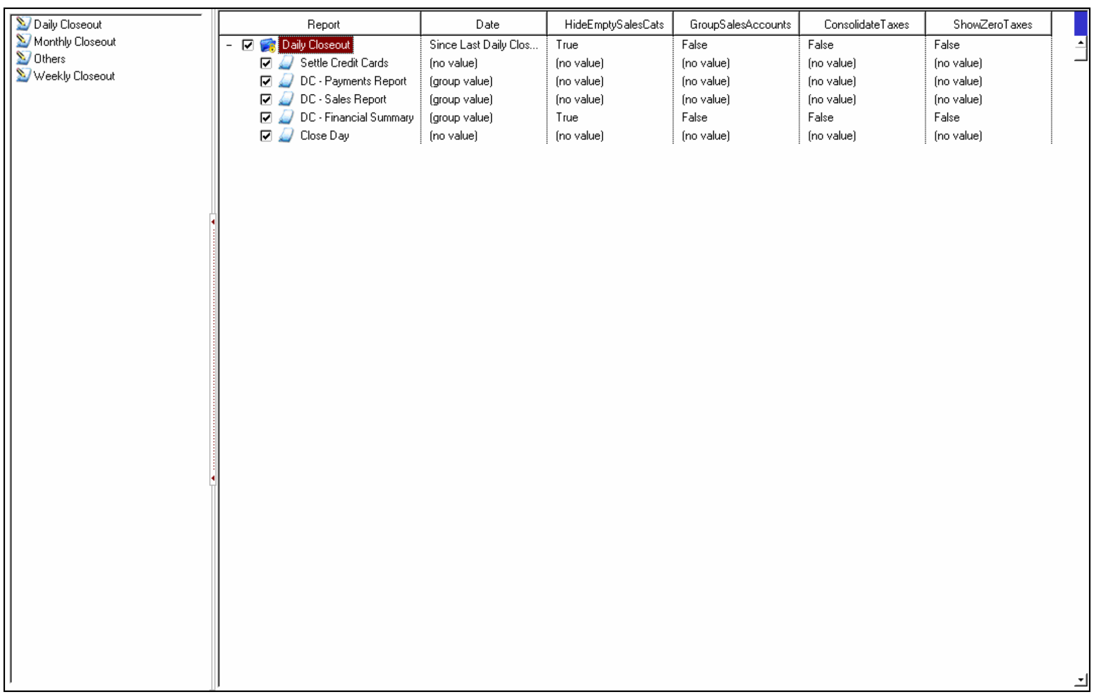


Figure 15-13 Main Quick Reports Screen

More detail …

SPECIAL ACTIONS TOOLBAR FUNCTIONS

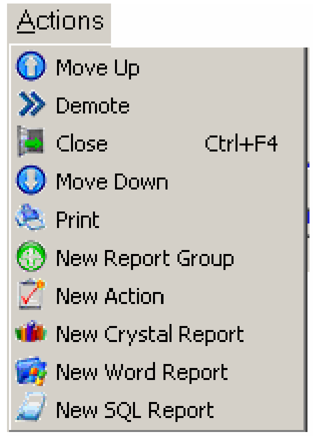


Figure 15-14 Quick Reports Screen Actions Menu Options

Close	Closes an unedited screen.
Print	Prints the selected order, estimate, company, etc.
New Report Group	Creates a new report group.
New Action	Opens a new action item.
New Crystal Report	Creates a new Crystal report.
New Word Report	Creates a new Word report.

PRINTING A DAILY CLOSE OUT REPORT

????

Daily close outs are typically performed before the cash drawer is deposited with the bank. For new shops, this may be once or twice a week, while more established stores typically do this daily.

The Daily Activity Report, which is usually the first report printed in the daily closeout, contains a summary of all accounting and payment transactions since the last daily close out. Among other things, this report lists the payments by payment group (cash, check, etc.) and reconciles the cash drawer prior to making any bank deposits.

Two additional reports, the Daily Payments Report and the Daily Orders Picked-Up (Sales) Report are also usually printed with the daily closeout. These reports provide more detail than the daily activity report and can be used for reconciliation that is more detailed.

The User can also specify other reports printed with each daily closeout.

PRINTING A WEEKLY CLOSE OUT REPORT

Although weekly close out reports are not commonplace, they do help with reconciliation should you need them.

PRINTING A MONTHLY CLOSE OUT REPORT

Monthly close outs are typically performed at the end of each month to close out the sales figures. Additional reports like the sales tax report, royalty report, commission report, sales breakdown by industry, sales breakdown by category, and others are often printed at this time.

The depth of analysis desired will determine which reports are printed. Additionally, many managers prefer a printout of the accounts receivable listing at least once a month.

OTHER REPORTS

Cyrious offers a report for just about every need a professional in the industry could need. However, our software also allows you to create your own reports. Our Implementation Team is happy to help you create these reports.

EFFECTIVE USE

WHY CLOSE OUT?

Closing out is an important part of disciplined accounting procedures. Cyrious uses daily, weekly, and monthly close outs to help simplify reporting procedures and practices

16 : ONLINE TAXES

CONCEPT

AvaTax is a service by Avalara that provides tax information for the entire US. Avalara is general purpose software, not specific for the sign or graphics industries. It is intended for retail as well as commercial businesses. Cyrious does not intend to implement every option available to Avalara subscribers. Instead, only those tax options commonly used by sign and graphic companies will be supported at this time.

REQUIREMENTS FOR USING AVATAX WITH CONTROL

In order to use AvaTax within Control, users must meet the following requirements:

- Have purchased the Tax module for Control from Cyrious.
- Have established an account with Avalara. Avalara typically charges on a per-transaction basis for tax lookups.
- Have a permanent Internet connection from the computer running the Cyrious SSLIP applicaiton.
- Open the following ports on any firewall to allow communication between the SSLIP and the AvaTax system: t.b.d.

COMMUNICATION FLOW

As with other external communication, the SSLIP will be the conduit for all communication with the AvaTax system. The sequence will be:

1. A tax lookup event is triggered in Control.
2. An order-level tax message is created containing:
    a. The source and destination address for the order.
    b. The source and destination address for each line item, if overridden.
    c. The product, pre-tax sale amount, and product tax code for each line item.
3. Each Source address is validated as it is added to the message if it is not already validated.
4. Each Destination address is validated as it is added to the message if it is not already validated. On average, this is expected to produce less than one address validation messages per order (since orders to repeat addresses should already be validated.)
5. Control sends a message to the SSLIP requesting tax information lookup.
6. The SSLIP sends a request to AvaTax requesting tax information lookup.
7. AvaTax responds to the SSLIP with the information.
8. The SSLIP responds to Control with the information.
9. Control returns the requested tax rates.

The following timeout events may be encountered:

- **The SSLIP waiting on connection to AvaTax**. Maximum wait time, none. If no connection can be made, terminate as soon as possible and notify the user that a connection to AvaTax could not be made.
- **The SSLIP waiting on response from AvaTax**. Maximum wait time, 30 seconds. If no response is received, terminate the connection and notify the user.
- **Control waiting on response from the SSLIP**. Maximum wait time, 60 seconds. A visual "working" screen should tell the user it is retrieving tax information via the web.

TAX CHANGES

TAX CLASS

A new type of system Tax Class called "**Online Lookup**" will be created. All tax lookups will be associated with this new Tax Class. This account will be automatically treated as inactive unless the Tax module is authorized. The user will not be able to delete this account or set it inactive manually, but can change the name.

The user must be able to set Online Lookup as the default tax class.

TAX ACCOUNTS

The Auto Lookup Tax Class will reference one system tax account, called "**Online Taxes**". This account will be automatically treated as inactive unless the Tax module is authorized. The user will not be able to delete change anything about this account.

PRODUCT TAXABILITY CODES

In earlier versions of Control, each product (in product setup) may be specified to be taxable, non-taxable, or exempted from specific taxes. In Control version 4, Product Taxability Codes (PTCs) are used to identify the tax treatment for products.

PTCs may be set to one of the following taxability options:

- **Taxed** - indicating the product is taxed at normal rates.
- **Tax Exempt** - indicating the product is exempted from all taxes.
- **Partially Tax Exempt** - indicating the product is exempted from certain taxes. A checklist of taxes is presented to select which taxes this product is exempt from.

The following PTCs are created automatically by the system:

- **Goods** - used for signs, prints and other graphic manufactured items.
    - Taxability set to "Taxed".
- **Services** - used for design, installation, and other services.

  - Taxability set to "Tax Exempt".
- **Resold Items** - used for outsource and resold items.
  - Taxability set to "Taxed".
- **Shipping** - used for freight and shipping.
  - Taxability set to "Taxed".
- **Installation** - used for installation items.
  - Taxability set to "Taxed".

Each fully taxed product is updated to be "Goods". Each non-taxable product is updated to be "Services". PTCs will be automatically created for any product which is partially exempted, and the corresponding adjustment made. A store wide default PTC may be set, and will initially be set to Goods.

When using AvaTax, each PTC will have a corresponding Tax Code. The tax code will be used in AvaTax to determine the taxability of the product. The Tax Code will default to the PTC name. If the accounting module is not authorized, the user will not see the corresponding Tax Code.

The Shipping Taxability Code uses FR020100 to take advantage of the automatic tax calculation for shipping to different states.

GENERAL LEDGER

The general ledger will need to store the following additional information about all sales tax entries:

- Product Taxability Code (PTC)

STORE SETUP

The following store settings will be established on a Tax Lookup setup frame:

- Avalara Account Number
- Avalara AvaTax Connection URL

The following other options will be on the tax frame.

Auto-Validate Options: (See Address Record Changes)

- Auto-complete and validate address during address entry.

Validation Update Options: (See Address Record Changes)

- Always update the address with the validated address

- Never update the address with the validated address
- Prompt to update the address with the validated address

CUSTOMER ADDRESS RECORD CHANGES

INFORMATION CAPTURED

AvaTax has the ability to verify addresses and return the corrected address. The following validated information will be stored in Cyrious:

- Address, properly formatted according to USPS rules
- City
- State
- Zip-9
- County
- Country - US or Canada

Additionally, the address record must know IF it was validated. This should be set upon validation and cleared when any field in the address changes (forcing re-validation).

STORAGE OPTIONS

Some customer may not wish for the address to be rewritten with the validated address, as words like "Highway" become the terser "Hwy". For these users, the option is given in system setup:

- Always update the address with the validated address
- Never update the address with the validated address
- Prompt to update the address with the validated address

In all cases, this information will be stored with the address record in the customer, contact, and/or order. The tax calculations REQUIRE validated addresses in order to compute. When the address record is not directly updated, the validated address should still be stored in an XML memo in the record for the program to access.

AUTO-COMPLETE OPTION

Another option that should be made available in System Setup is:

- Auto-complete and validate address during address entry.

If this option is selected (it should default to on), as soon as the user types the address, city, and state or the address and postal code, the address authorization should be called and the complete address set.

STORE ADDRESS RECORD CHANGES

Some tax authorities require the source (Ship-From) location as well as the destination (Ship-To) addresses. Because the system does not know in advance if it is required, the source address is a requirement for all orders.

The option to add multiple addresses to the store record was added in Control 3.1. These addresses will now be used to fill a drop-down of Ship-From locations in the order/estimate record, although other addresses may be used. (See Order Entry Changes.)

CUSTOMER RECORD CHANGES

The options for tax lookup should change for the customer. The drop down list for "Default Tax Class" will include the new tax class, "**Online Lookup**", for anyone using AvaTax.

The option to "First Try to Lookup by Postal Code" should be hidden (removed) for anyone with the online tax module..

Setting the division of a company will cause it to use the default ship-to location of that division.

POSTAL CODE TAX CLASS CHANGES

The options for Postal Code Tax Class should be removed from the System Setup and other menus for customers with the online tax option. This option will not be available, since it is a manual approximation of what the online tax option provides.

ORDER RECORD CHANGES

SHIP-FROM ADDRESS:

The first addition to the order and line items is to add a source (ship-from) address. This is used to determine the origin of the shipment for product. The ship-from addresses will be selected from a drop-down box with the following entries (in this order):

- Company Billing - The main company address.
- Company <<other>> - Other company addresses from store setup.

- Division <<division name>> - When divisions are used, the address for each division (excluding the Company) should be included.
- Choose ... - Some option to allow the customer to choose an alternate address.

The drop-down should fill in with something like the following:

Company Billing - 12627-C Jefferso
Company Florida - 1932 North Blufo
Division Reselling - 555 Main Street,
Choose Other ...

The default address should be the address that corresponds to the division of the order. If divisions are not enabled, then the Company Billing address should be the default.

For orders, the Ship-From address combo box should be located on the Customer tab in Order Entry.

For line items, the Ship-From value will default to the order's Ship-From value. However, on the advanced screen for the line item the user should have the ability to change this setting. The same drop-down and options should be given to the user.

SHIP-TO ADDRESS:

The Ship-To address handling also needs to change in Control 4. Previously, the contact's shipping information automatically populated the Ship-To address. However, now the user must have a way of indicating that the order will be picked up (and use the ship-from address instead of a different address).

The Ship-To address should now be reworked to be a drop-down box. The drop-down box should have the following entries (in this order):

- Local/Pick-Up
- Contact Shipping - The shipping address of the contact.
- Contact <<other>> - Other addresses from the contact record.
- Customer Shipping - The main shipping address of the customer.
- Customer Billing - The customer's billing address.
- Customer << other>> - Other addresses for the customer record.
- Choose ... - Some option to allow the customer to choose an alternate address.

For line items, the Ship-To value will function as it currently does, though the interface should change to match the order. That is, the Ship-To will default to the order's Ship-From value. However, on the advanced screen for the line item the user should have the ability to change this setting. The same drop-down and options should be given to the user.

BILLING ADDRESS:

Although there is no change in the functionality associated with the billing address for an order, it should be visually reworked with a drop-down similar to the others. The entries in the drop-down box should be (in this order):

- Contact Billing - The contact's billing address.
- Contact Shipping - The shipping address of the contact.
- Contact <<other>> - Other addresses from the contact record.
- Customer Billing - The customer's billing address.
- Customer Shipping - The main shipping address of the customer.
- Customer << other>> - Other addresses for the customer record.
- Choose ... - Some option to allow the customer to choose an alternate address.

INVALID TAX STATE

It is also possible that the Internet might be down when an order is being put in. In that case, it would not be possible to perform a tax calculation. Regardless, it is desirable that the user be allowed to put in as much information as possible

The order record (TransHeader) and line item (TransDetail) each need a boolean field to indicated whether the Tax Calculations are valid. When they are not valid, the following fields should be affected:

- The IsValidTax field should be set to False
- Any tax amounts in the database should be written as NULL
- The salestotal fields should also be NULL
- All other fields based on SalesTotal, including BalanceOustanding should be NULL

Care should be taken that if an order was 100% prepaid with tax, then the absence of tax should not automatically create an overpayment. The rule should be that if Tax is not able to be computed, then it should not consider anything an overpayment or adjust any payments.

TAX INFORMATION STORAGE

As a store option, the full tax information retrieved for each line item will be stored in the TransTax table. Separate records for each tax will be created. The data should be stored as an XML blob field. The name of the tax should be stored in a field for easy access for reporting.

TAX CALCULATION MECHANISM

TAX CALCULATION LOCKING

In previous versions of Control, the tax was calculated each time any variable or modifier or part in the order changed. The speed when calculating taxes from internal table makes this real-time approach practical. However, sending even a simple message across the Internet and receiving a response message will normally take a minimum of 0.4 seconds (though normally 0.6 or more should be expected). This delay would be very noticeable, hamper efficiency, and aggravate the user.

For these reasons, a tax-lock mechanism should be incorporated when using online tax lookup.

Taxes are looked up on the following conditions:

- The user clicks on a "Lookup Taxes" button.
- The user saves the order or estimate.

SETTING "LOOKUP TAXES ONLINE" AT THE ORDER LEVEL

Taxes in Control are calculated at the line item level. When an order is set to "Lookup Taxes Online", all line items default to this tax classification.

Whenever taxes are looked up, they are looked up for the entire order (all line items), even if the lookup request is generated for a single line item.

SETTING "LOOKUP TAXES ONLINE" AT THE LINE ITEM LEVEL

Line items may only be set to "Lookup Taxes Online" when the order has "Lookup Taxes Online" as its default tax class. Line items may override their orders tax class, but they may not to lookup taxes.

If the order is set to "Lookup Taxes Online", the line item may override this setting to a static tax class. If the line item is overridden to use a static tax class, it will be calculated manually and not included in the tax record sent to AvaTax. This will result in parts of the order showing up on both the Cyrious Control internal tax reports and the AvaTax online tax reports; each for their corresponding amount.

TAX LOOKUP

When a tax lookup event is triggered, the following sequence of events happens:

1. A "Looking up Online Taxes" dialog is displayed
2. An order-level tax message is created containing:
    a. The source and destination address for the order.
    b. The source and destination address for each line item, if overridden.
    c. The product, pre-tax sale amount, and product tax code for each line item.

3. Each Source address is validated as it is added to the message if it is not already validated.
4. Each Destination address is validated as it is added to the message if it is not already validated. On average, this is expected to produce less than one address validation messages per order (since orders to repeat addresses should already be validated.)
5. Control sends a message to the SSLIP requesting tax information lookup.
6. The SSLIP sends a request to AvaTax requesting tax information lookup.
7. AvaTax responds to the SSLIP with the information.
8. The SSLIP responds to Control with the information.
9. Control returns the requested tax rates.

TAX POSTING

Taxes are posted to AvaTax when an order is marked Sale. Prior to that time, all requests for tax lookup are done without committing the order, and AvaTax will not recognize the tax as having been incurred. This can be done as a quote.

The same order number should be used for all Tax lookup calculations for an order. To differentiate orders from estimates, Orders numbers should be prefixed with "o" and estimates should be prefixed with "e". For example, Order 1234 would be referenced in AvaTax as o1234 and Estimate 5678 would be references in AvaTax as e5678.

EDITING EXISTING ESTIMATES AND ORDERS

ESTIMATE EDITS

Estimate edits cause the estimate taxes to be recalculated. The lookup is done as if it were a new estimate, but using the existing estimate number (preceded by the letter "e" as indicated elsewhere).

ORDER EDITS BEFORE SALE

Edits to Orders in WIP and Built causes the taxes to be recalculated. The lookup is done as if it were a new order, but using the existing order number (preceded by the letter "o" as indicated elsewhere).

ORDER EDITS AFTER SALE

Once an order is a sale, it has already been recorded in the AvaTax system. As such, changes must be made to reverse the effects of previous taxes and post the new taxes. This is accomplished in the following manner:

1. A copy of the original order is made in memory.
2. When the order is revised, the system scans the original and new order to determine if any of the following have changed for any line item: subtotal, product, tax class, tax exempt status.

3. If none of those have changed, the order original taxes are retained and nothing further (tax-wise) is done.
4. If any of the line items have changed, a negative copy of the original order is made. To make a negative copy, each line item is made negative. The letter "o" (for original) is also appended to the line item number.
5. The line items for the negative original order is then added to the new order. This produces an order with two line items for most line items: one positive for the new value and one negative with the original value.
6. The combined order is submitted for tax posting. This will post a negative or positive value based on the changes made.
7. Since AvaTax won't accept two final orders with the same number, the revision number of the order should be appended to the order number. The original order 1234 will be known as "o1234". The first adjustment (after sale) for that order would be "o1234a", the second "o1234b", and so forth.

LIMITATIONS WHEN UNABLE TO CONNECT

STATUS CHANGE TO SALE

When an order is marked "Sale", the tax event occurs and the taxes are recorded in the AvaTax system.

If the SSLIP is unable to connect to AvaTax to lookup the taxes, the user will receive a message such as

The system was unable to connect to AvaTax to record the taxes. Therefore, this order cannot be changed to Sale at this time. Please contact your system administrator or try again later. Message from SSLIP: <<reason message>>

The appropriate reason message (such as "Could not connect to AvaTax", "Account not authorized", etc.) should be inserted into this message.

A log of the attempt and message should be created.

Existing orders should remain in his previous state (WIP or BUILT). If Cyrious is configured to save new orders automatically in a SALE status, the order should remain unsaved and the user should be left in edit mode.

CONVERTED ESTIMATES, CREATING NEW ORDERS, AND STATUS CHANGE TO BUILT

When the changes do not create a taxable event, and SSLIP is unable to connect to AvaTax to lookup the taxes, the order is still saved but the following things should also occur:

1. The user should be notified with a message like:

The system was unable to connect to AvaTax to record the taxes. Therefore, the taxes could not be computed at this time. The order (or estimate) will still be saved but the taxes are left undetermined. This may affect the way your invoice or other reports print. Please contact your system administrator or try again later. Message from SSLIP: <<reason message>>

2. An activity should be created, or notes should be made in the edit/creation activity, indicating the reason the connection could not be made.

3. The order is saved with an invalid tax state as indicated elsewhere.

EDITS

If the SSLIP is unable to connect to AvaTax when editing an Estimate or Order in WIP/Built, the procedure is identical to that for in the preceding section (Converted Estimates, etc.); that is, the user is notified but the save is allowed. The order is saved but with an invalid tax state.

If the order is already a Sale, however, the save may not take effect because the tax changes cannot be posted. Therefore, the procedure should be identical to that when changing the status to a sale; that is, the user is notified and the save is NOT allowed.

VOIDS

Voiding an order that is already a Sale is the (accounting) equivalent to editing it down to zero. Therefore, the procedure is the same as for edits, based on the status of the order.

If not connection can be made when voiding an estimates or a orders in WIP or built, the void is allowed and the tax is left in an invalid state. If the order is in a Sale status, the void is NOT allowed.

ORDER SCREEN CHANGES

ITEMS TAB - TAX LOCK STATE

When taxes are locked (not being calculated) for a line item, the column on the Items tab that normally shows the tax amount should instead have a button that says "Calc. Taxes" (or similar). Clicking this button should recalculate the taxes for the entire order.

The sales total (after tax) column should display the text "not available" (or similar) if the taxes are not known on that line item.

TOTALS TAB - TAX LOCK STATE

When taxes are locked (not being calculated) for an order, there needs to be a button on the Total tab (near the taxes) that says "Calc. Taxes" (or similar). Clicking this button should recalculate the taxes for the entire order.

REPORTING CHANGES

INVOICE

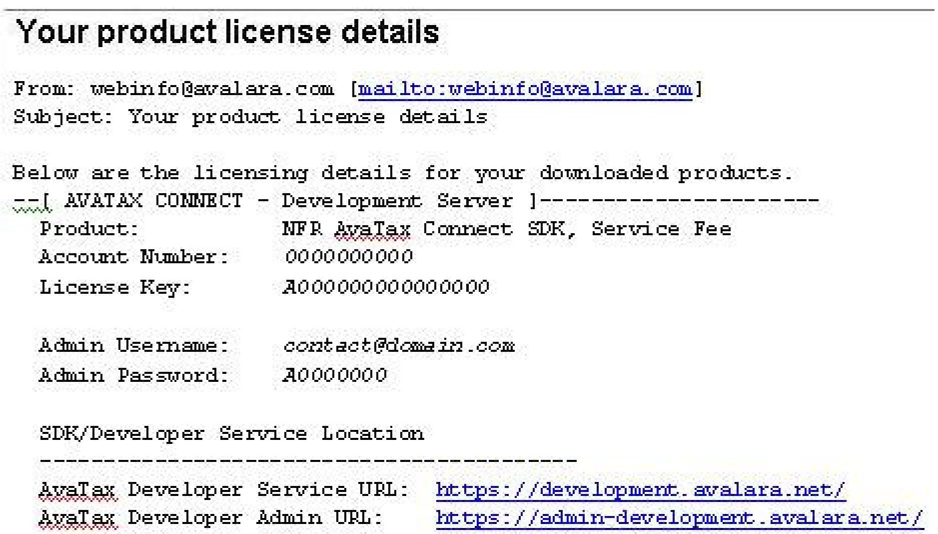
CYRIOUS REPORTS

AVALARA REPORT RETRIEVAL

SETTING UP AVATAX

GO to the AvaTax Developer Admin URL supplied in the license details email:

https://admin-development.avalara.net/


Your product license details

```
From: webinfo@avalara.com [mailto:webinfo@avalara.com]
Subject: Your product license details

Below are the licensing details for your downloaded products.
--[ AVATAX CONNECT - Development Server ]---------------------
  Product:           NFR AvaTax Connect SDK, Service Fee
  Account Number:    0000000000
  License Key:       A000000000000000

  Admin Username:    contact@domain.com
  Admin Password:    A0000000

  SDK/Developer Service Location
  ------------------------------------------
  AvaTax Developer Service URL:  https://development.avalara.net/
  AvaTax Developer Admin URL:    https://admin-development.avalara.net/
```

Figure 16-1 AvaTax License Details Email

1. Sign in using the Admin Username and Admin Password
2. Click on the Organization link
3. Create an account and set the Company Code. The company code will be needed for Control to use Avatax.

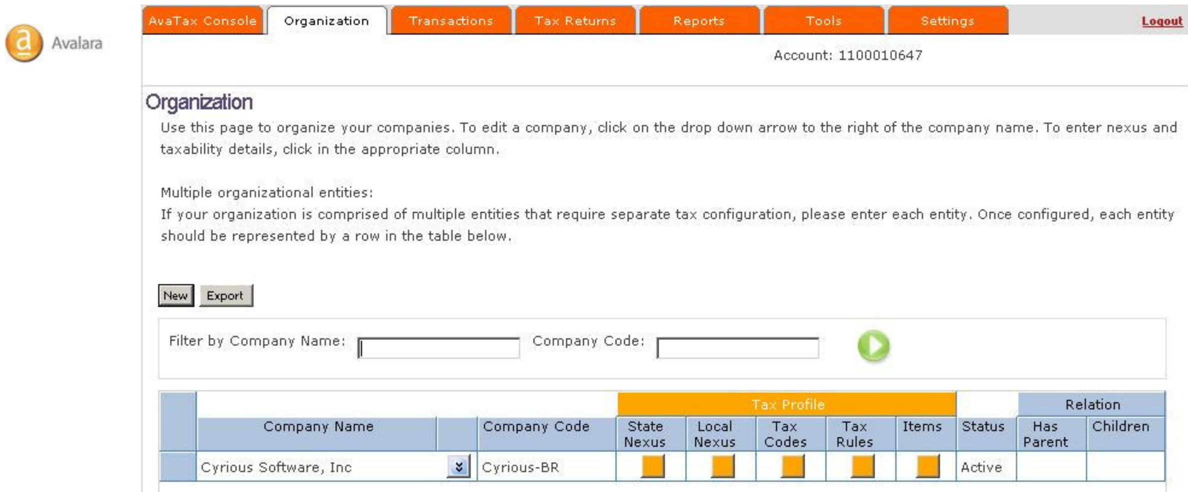


Figure 16-2 AvaTax Organization Setup Page

4. On the Organization page, click the button under the State Nexus column.

5. Select the states that the company will retrieve the online taxes for.
6. Click Save to save the changes.

Some states have special taxes for different counties. All special taxes that must be accounted for must be manually selected in Avatax. Ex. Georgia has special taxes for Appling County.

1. Go to the Organization page
2. Click on the local Nexus button

Figure 16-3 AvaTax Local Nexus Button

3. Select the state (in this case Georgia)

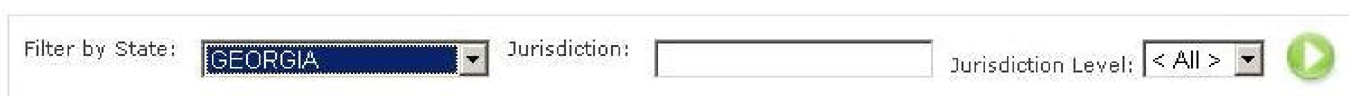


Figure 16-4 AvaTax Local Nexus State Filter

4. Click the arrow to force the webpage to refresh with all of the special taxes for Georgia.
5. Select all special taxes that apply.
6. Click Save to save the settings.

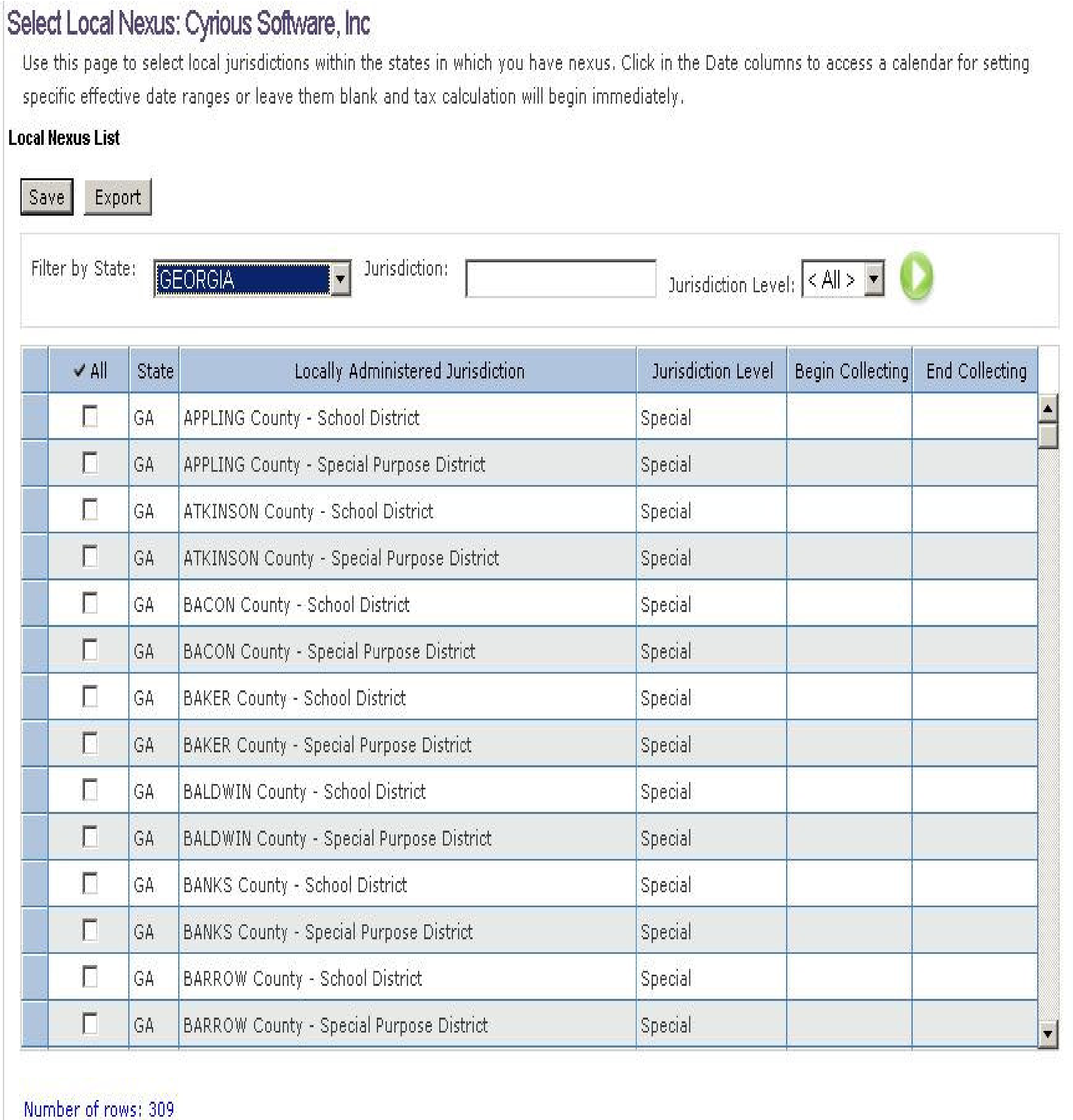


Figure 16-5 AvaTax Local Nexus Setup Page

SETTING UP CONTROL TO USE ONLINE TAXES

Go to Setup >> System Setup >> Accounting >> Online Tax Options

ONLINE TAX OPTION SETUP

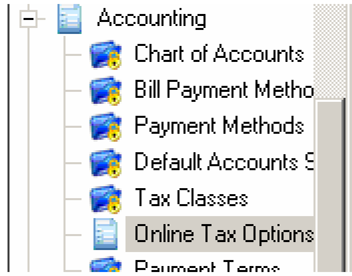


Figure 16-6 Control Online Tax Option

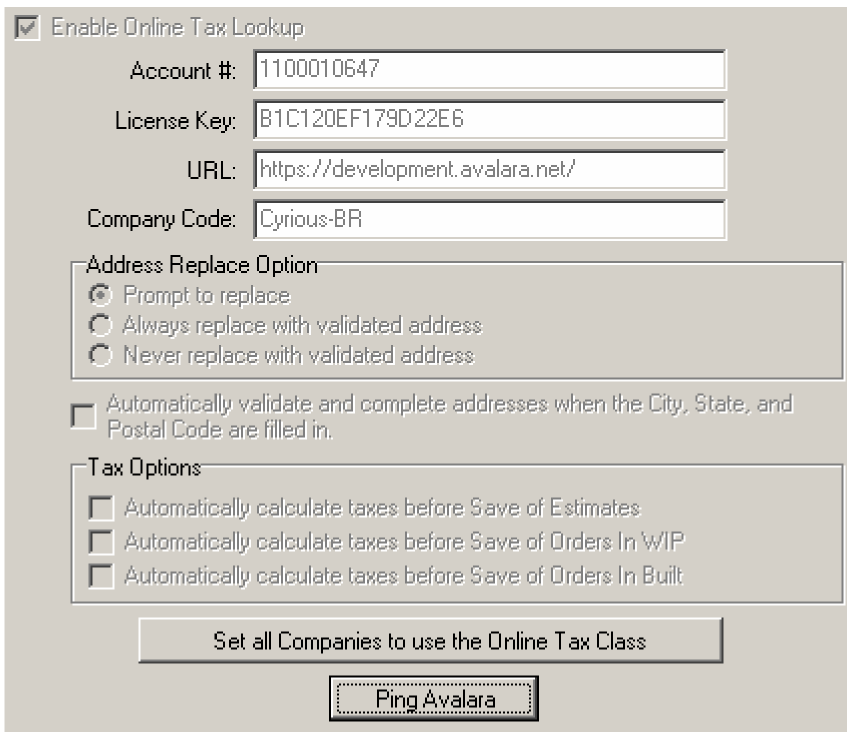


Figure 16-7 Control AvaTax Setup

Authorize the key for Online Taxes
Check the Enable Online Tax Lookup option.

Fill in the AvaTax information using the license information obtained from Avalara.

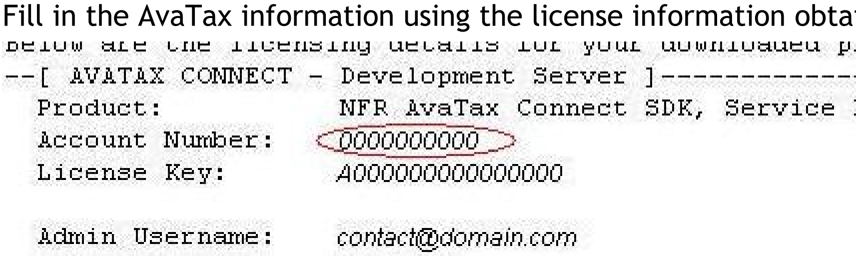


Figure 16-8 AvaTax License Details Email (Account Number)

Fill in the Company Code with the Company Code from the AvaTax web site.

Figure 16-9 AvaTax Organization Setup (Company Code)

Set the URL to the AvaTax Developer Server URL provided in the email.

Figure 16-10 AvaTax License Details Email (URL)

TAXES FOR SHIPPING / FRIEGHT

In order to use Avatax's feature to calculate taxes for shipping to different states and using each state's tax rules for shipping, all shipping products will have to be set to use the Shipping Taxability Code.

AvaTax uses the Product Code FR020100.

SETTING COMPANIES TO USE ONLINE TAX

Set the default tax class.

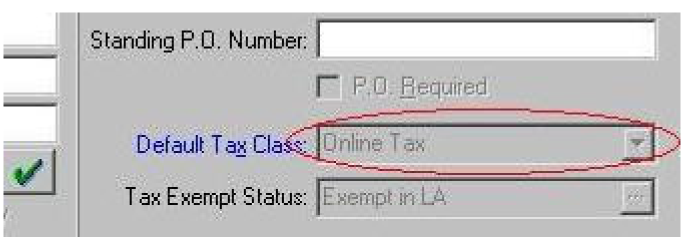


Figure 16-11 Default tax class in Company Entry

Validating Address with AvaTax

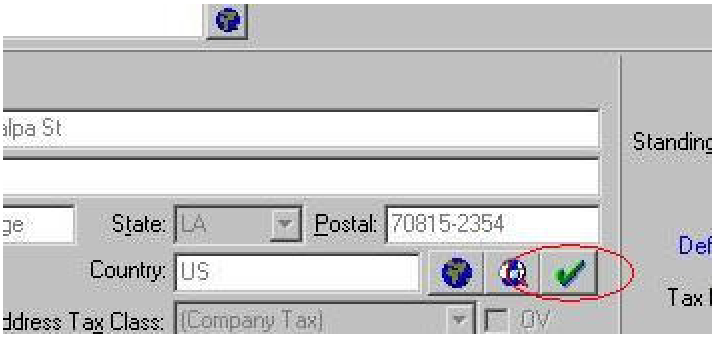


Figure 16-12 Validate address button in Company Entry

ORDER ENTRY

Before retrieving taxes from AvaTax, the addresses are validated to guarantee an accurate calculation.

Before taxes are retrieved from AvaTax

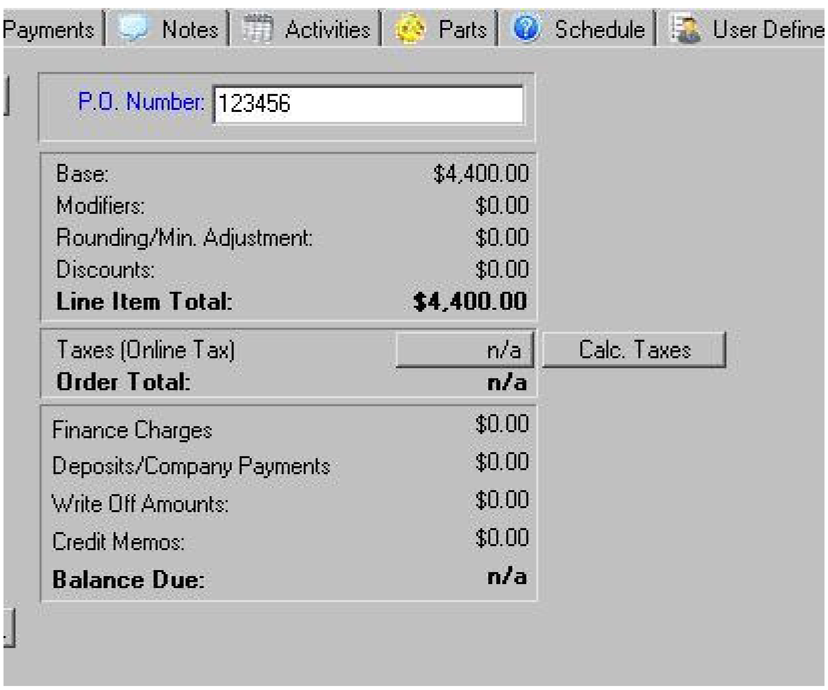


Figure 16-13 Totals tab before taxes calculated online

After taxes are retrieved from AvaTax

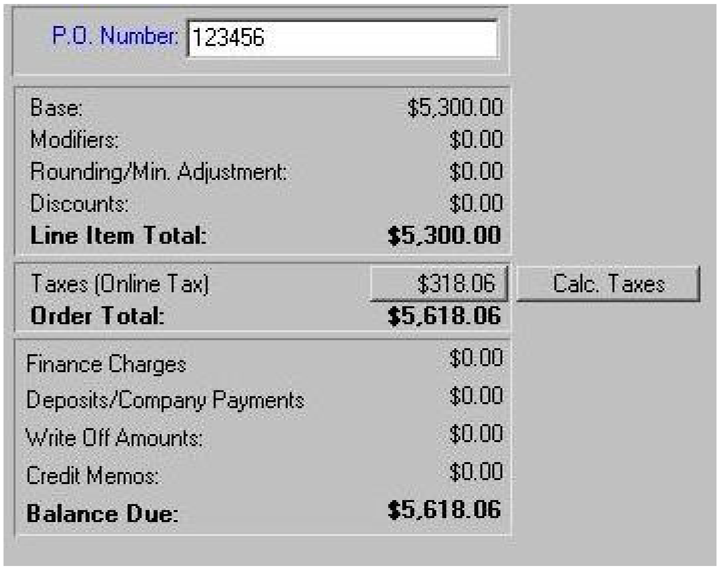


Figure 16-14 Totals tab after taxes calculated online

Tax breakdown

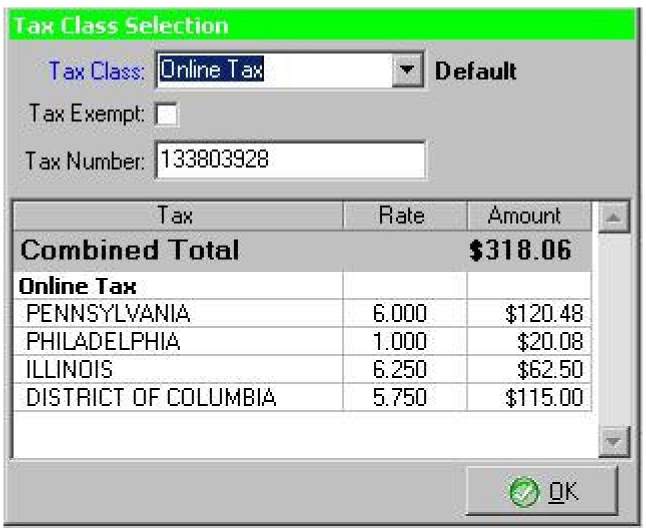


Figure 16-15 Tax breakdown

Line Item tab

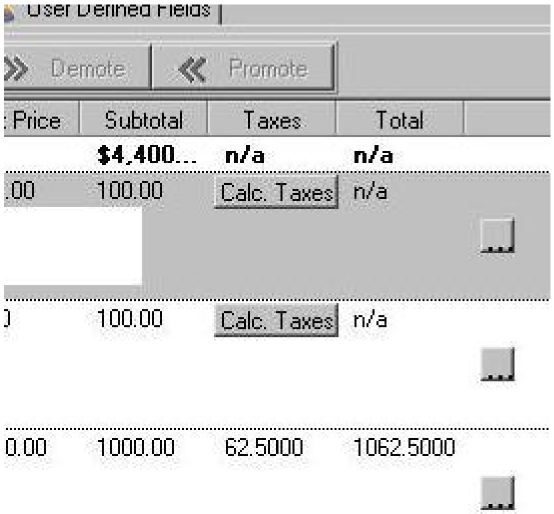


Figure 16-16 Line item totals before taxes calculated online

MANUAL SETUP

1. The AvaTax documentation also states that both .NET v1.1 and WSE2 must be installed prior to using the Avalara AvaTax Adapter.

   The WSE2 can be downloaded here: http://www.microsoft.com/downloads/details.aspx?FamilyId=FC5F06C5-821F-41D3-A4FE-6C7B56423841&displaylang=en

2. Copy the following files to the same folder as the SSLIP executable:

   Avalara.AvaTax.Adapter.dll

   Microsoft.Web.Services2.dll

3.

   a. Copy log4net.dll (version 1.2.0.30714) into a subfolder called AvaTax.

   b. Place the log4net.dll (version 1.2.0.30714) into the GAC (Global Assembly Cache), which is the <%WINDOWS%>\assembly directory.

<%WINDOWSDIR%> will either be C:\WINNT\ or C:|WINDOWS\ depending on the version of Windows installed.

4. Run the following command:

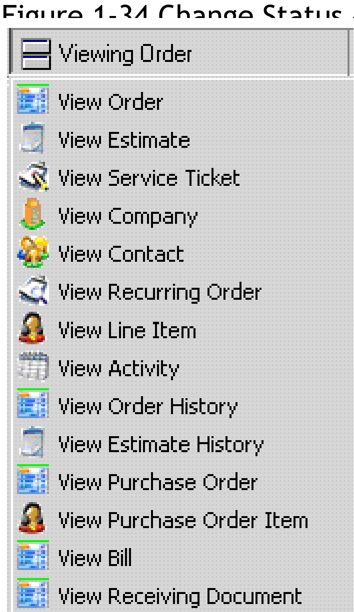
%dn\regasm.exe "%ss\Avalara.AvaTax.Adapter.dll"

where:

%dn : The path for the Microsoft.Net Framework (ex: C:\Windows\Microsoft.Net\Framework\v1.1.4322)

%ss : The path to the SSLIP executable (ex: C:\Program Files\Control\SSLIP)

TABLE OF FIGURES


Viewing Order
View Order
View Estimate
View Service Ticket
View Company
View Contact
View Recurring Order
View Line Item
View Activity
View Order History
View Estimate History
View Purchase Order
View Purchase Order Item
View Bill
View Receiving Document