
Aptify Web End User Training Manual

Version 5.5.5

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Objective

Welcome Aptify's End User training. This course introduces the Aptify system and covers how to access common features and functions. By the end of this course, students will have a solid foundation for using Aptify.

Users will learn how to:

- Navigate Aptify
- Locate, create, and work with records
- Create and manage views of data
- Generate reports
- Use Contact Logs, Cases, and Committees
- Create and order Products, Memberships, and Subscriptions
- Apply Payments
- Track Meeting Information

Introduction to End User Training

The following chapters and sample exercises will guide users through the various functions available in Aptify and how it should be used.

This course provides an overview of Aptify's basic features and will familiarize users with core functions of Aptify. It offers a solid background for users to become acquainted with the system as it introduces the basic Aptify framework, using a fictitious association's database to gain experience with a wide variety of system applications and creation of data views.

With step-by-step directions, users learn how to navigate the system as well as enter and view data by partaking in sample, hands-on exercises. The focus of this End User course and manual is learning the applications by using the system.

The overall goal of the course depends on its audience. For Implementation training of newly signed clients, Subject Matter Experts (SME's) representing a particular department within an organization will gain the knowledge to move into the Discovery phase of the Aptify implementation process in a more efficient and effective manner. For existing clients the course provides step-by-step directions and best practice instruction on the modules of Aptify that they can leverage in their departments. For this reason, the manual was constructed not just to support the class, but to be utilized as a reference for Aptify users in their workplace.

Upon completion of the course, users will have learned the best practices regarding how to use Aptify for their needs and the Aptify terminology. For example, Aptify users learn that "persons" records are any person in their database, "products" are anything that can generate income, including a virtual product such as membership, a class or meeting, and physical products like publications.

Note that this course is conceptually divided into two parts: The **first half** of the course focuses on Aptify **navigation, terminology**, becoming familiar with **record types** and creating multiple **view types**. The second half focuses on **creating, ordering, and using products** such as Memberships and Meetings. Users will continue using views to report and communicate data.

Document Conventions:

In this manual bolded text are keyboard keys, e.g., **Esc** or **Enter**, and items to click or select from menus, for example, "Select **New Groups Record** and click **OK**".

Object names are in regular type and the first character is capitalized; for example, "The form includes the Name field."

Log in to Aptify

This exercise and those on the next several pages familiarize the user with the Aptify home screen and components.

Begin by logging in to Aptify and learn how to navigate to primary interface elements.

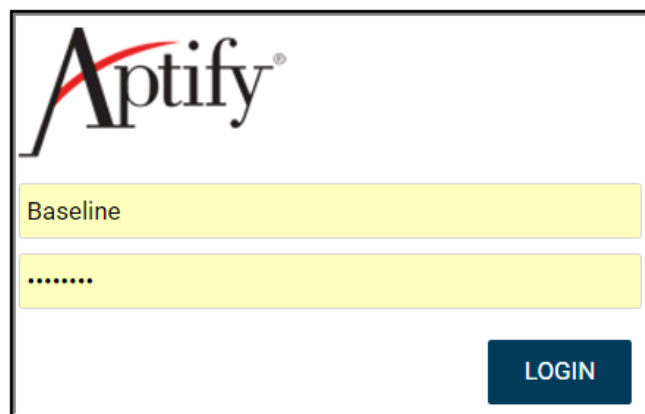
1. Double-click the **Aptify Web** shortcut on your desktop.



2. Click on the **Authentication Method** dropdown and select **Untrusted|SQL Security**.
 - This User represents a SQL Training DB user; a typical user would not get the Authentication screen but would directly display the Login screen.
3. Click **OK**.



4. Click **LogIn**.
 - The Baseline login info previously populated/saved in Google Chrome.



5. The Aptify **Home** screen displays.

Navigating Aptify

Aptify is designed to display data from multiple departments and/or functions in one database. When set up and used correctly, Aptify should be relatively simple and easy for each department to interface with on a daily basis.

Aptify should be navigated by using the Home dashboard, Quick/Global Search, Favorites, Dashboards, and Views. Users will always enter Aptify via the Home Dashboard and can then to navigate to the data using the other components mentioned above. When desiring to find large groupings of data, users should utilize Prompted List Views. When entering new data, users should employ focused Wizards tied to Dashboard buttons. When finding just one record is desired, users should use the Universal Search.

For a typical Aptify end user, the desired data should be no more than three clicks away. This structure is designed to make Aptify both flexible in its deployment and configuration and focused in its final design.

How Aptify Works

Aptify is Customer Relationship Software (CRM) designed for Association-based clients built around the following hierarchy:

- Applications
- Services
- Records
- Views
- Favorites
- Dashboards

Aptify Terminology & Hierarchy

Aptify helps organizations quickly access and manage their data by organizing it in a hierarchical fashion, with similar types of information grouped together. The following pages cover the main terms every Aptify user should know.

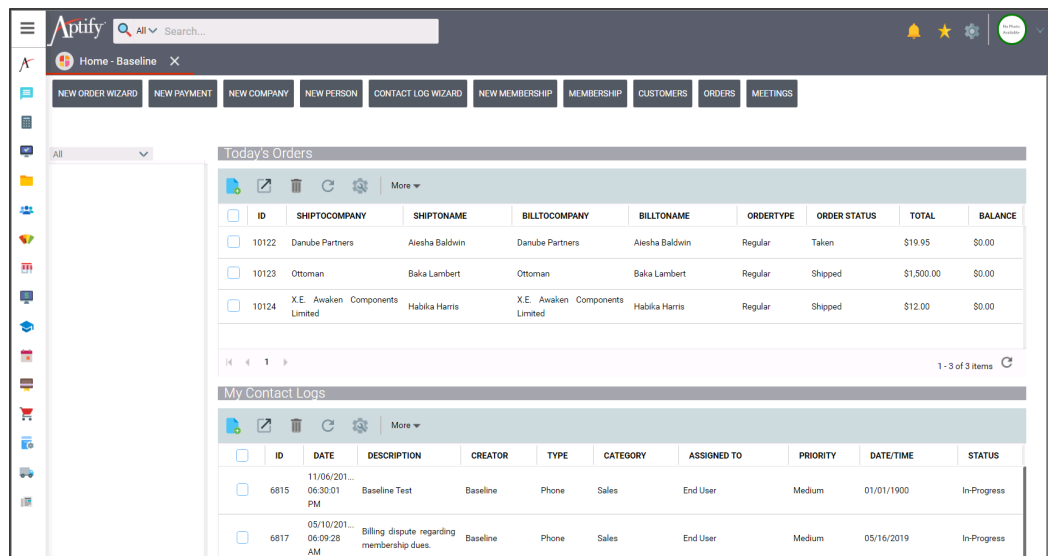
Initial Aptify Display

When Aptify opens, users automatically land on a **Home Dashboard**. The Home dashboard serves as a consolidated functional/viewing area that reflects the user's main tasks and the data they need to interact with regularly. The Home dashboard should be configured, via the users profile, to mirror users' department/functions within the database. For many, the Home dashboard and 2-3 additional dashboards (applications), will be all the access needed. For example, in addition to the Home dashboard, membership management users could leverage the Membership and Orders application and their dashboards. These dashboards would contain buttons to open new Persons records, apply payments, create orders, and perform functions such as run the New Member or New Order wizards.

Home should have a **Button Bar** tied to it that reflects main operations needed. For instance, a Customer Service Representative's Home could have a New Order, New Member, and a New Contact Log button. In contrast, an Accounting user's Home Dashboard might have New Order Batch and New Payment button.

Home should also have multiple, embedded **Views** that reflect the users' most important daily functions. A Customer Service Representative might have views titled, Orders Taken Today and/or Payments Taken Today. An Accounting user might see a view of Past Due Balances over the past 30 Days or Batches Scheduled for Today.

Favorites, located on the **Menu Bar**, will display no matter where the user navigates. They contain frequently used views that enable users to interact quickly/variably with data.



The screenshot displays the Aptify Home Dashboard interface. At the top, there is a search bar and a navigation menu with buttons for 'NEW ORDER WIZARD', 'NEW PAYMENT', 'NEW COMPANY', 'NEW PERSON', 'CONTACT LOG WIZARD', 'NEW MEMBERSHIP', 'MEMBERSHIP', 'CUSTOMERS', 'ORDERS', and 'MEETINGS'. The main content area is divided into two sections:

Today's Orders

ID	SHIPTOCOMPANY	SHIPTONAME	BILLTOCOMPANY	BILLTNAME	ORDERTYPE	ORDER STATUS	TOTAL	BALANCE
10122	Danube Partners	Alesha Baldwin	Danube Partners	Alesha Baldwin	Regular	Taken	\$19.95	\$0.00
10123	Ottoman	Baka Lambert	Ottoman	Baka Lambert	Regular	Shipped	\$1,500.00	\$0.00
10124	X.E. Awaken Components Limited	Habika Harris	X.E. Awaken Components Limited	Habika Harris	Regular	Shipped	\$12.00	\$0.00

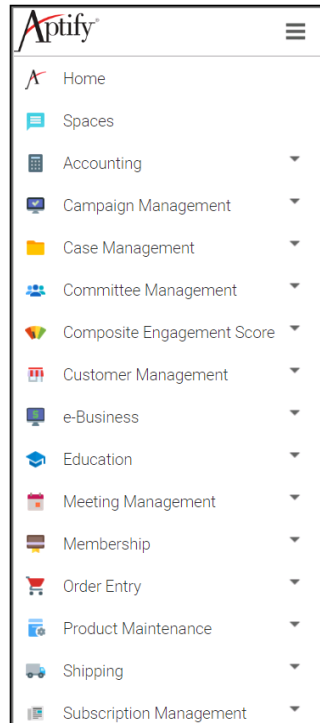
My Contact Logs

ID	DATE	DESCRIPTION	CREATOR	TYPE	CATEGORY	ASSIGNED TO	PRIORITY	DATE/TIME	STATUS
6815	11/06/201... 06:30:01 PM	Baseline Test	Baseline	Phone	Sales	End User	Medium	01/01/1900	In-Progress
6817	05/10/201... 06:09:28 AM	Billing dispute regarding membership dues.	Baseline	Phone	Sales	End User	Medium	05/16/2019	In-Progress

Applications

Applications are areas of Aptify that group conceptually-related services under a single heading. They are listed alphabetically by default and users can designate which Applications to display. Clicking on an Application provides a drop-down menu of available Services.

For example, the **Customer Management Application** groups several services, including Persons and Companies, which are focused on customer information. A user can access a service by first selecting an Application and then clicking one of the services it contains.



Note that a service can be listed under more than one Application. The Persons service is found under both Customer Management and Membership Applications. Also be aware that administrators can create their own Applications and change which services are associated with an Application.

A typical user will only have 2-4 Applications that are used regularly and should be displayed, unlike the list shown in the screenshot above.

Dashboards

A user always land on the Home dashboard. However, once an Application is selected from the Applications menu, the area to the right will display that selected Application's dashboard - the Home dashboard location will then be selectable from a separate tab. A dashboard is an interactive display that provides access to common functions and information aiding the user in daily activities. Application dashboards typically feature two main areas:

Buttons that perform frequently used functions:

- Creating records
- Launching wizards

Views that summarize or provide tasks:

- Data for a given time frame/status
- Records assigned to the logged in user

Dashboards can also include **Web Browsers** and embedded **Reports**.

Users can switch between applications to access different dashboards.

The screenshot displays a dashboard for the Meeting Management Application. At the top, there are two buttons: 'NEW MEETING WIZARD' and 'ORDER WIZARD'. Below these are three data views, each with a toolbar containing icons for search, refresh, and other actions, along with a 'More' dropdown menu.

Future Meetings

ID	MEETING TITLE	START DATE	END DATE	CITY	STATE	COUNTRY	COORDINATOR	TOTAL REGISTRANTS	TOTAL WAITLIST
61	XYZ Meeting	12/07/2016	12/11/2016	Marathon	FL	United States	John Samuels	0	3
62	XYZ Session I	12/07/2016 PM	12/07/2016 PM	Homestead	FL	United States	John Samuels	1	0

Meeting Registrations Last 30 Days

ID	ORDER DATE	MEETING NAME	ATTENDEE ID NAME	ATTENDEE STATUS NAME	SHIP TO NAME	SHIP TO COMPANY	BILL TO COMPANY	ARRIVAL DATE
10142	01/14/2016	Golf Tournament	Baldwin, Aiesha/Denube Partners	Registered	Hannah Taylor	Gemstone Solutions Group	Gemstone Solutions Group	01/01/1900
10141	01/14/2016	Golf Tournament	Taylor, Hannah/Gemstone Solutions Group	Cancelled	Hannah Taylor	Gemstone Solutions Group	Gemstone Solutions Group	01/01/1900

All Meeting Speakers (BASE VIEW)

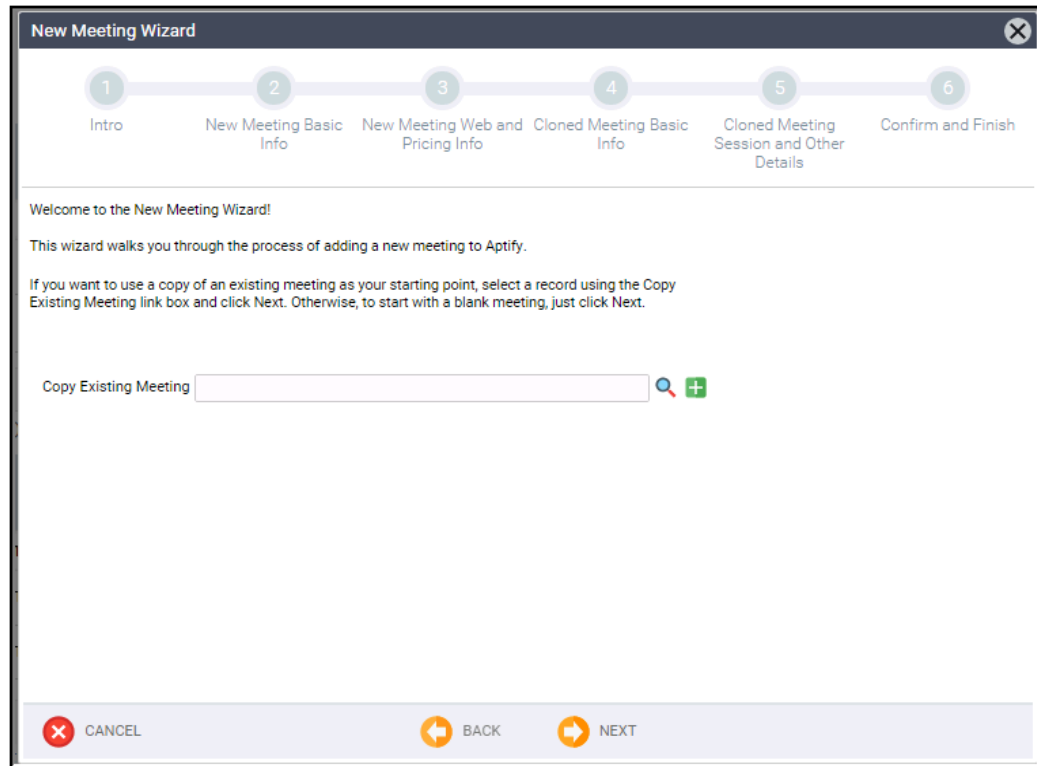
ID	MEETING TITLE	MEETING PRODUCT NAME	MEETING START DATE	MEETING END DATE	MEETING SPEAKER NAME	MEETING SPEAKER STATUS
17	Golf Tournament	Golf Tournament	05/15/2010 08:00:00 AM	05/15/2010 03:00:00 PM	Zagreb, Tracey/N Porethouse Filtration Management AB	Accepted
5	Sampco 2007 Annual Conference	Sampco 2007 Annual Conference	05/14/2007	05/17/2007	Garcia, Kaitlyn/N.G.N. Derived Industrial Products Corp.	Accepted

The Dashboard displayed above is for the **Meeting Management** Application. It contains two buttons: New Meeting Wizard and Order Wizard. These buttons enable a Meetings user to perform data entry efficiently. Below the button bar are three views: Future Meetings, Meeting Registrations Last 30 Days, and All Meeting Speakers (BASE VIEW). These three views serve to display data that is core to the function of a user concerned with Meetings.

Dashboards can be edited to fit departments and groups needs by an administrator. A different Home dashboard can be created for any identified department or function.

Wizards

A wizard is a step-by-step guide that helps users enter information or perform a task. They are usually tied to dashboard buttons for easy access. Wizards are divided into several screens, or pages, where the user selects an option or adds a value before advancing to the next page.



Wizards save time by presenting all the steps of a task in a single location. Conversely, if a user opened a new record directly from a service (not using a wizard) to enter data, they would often have to navigate through multiple areas to enter the required data. Wizards vastly simplify this process.

Benefits of wizards:

- Speed
- Data Integrity
- Consistency of which data entered, required
- Ease - no jumping from tab to tab

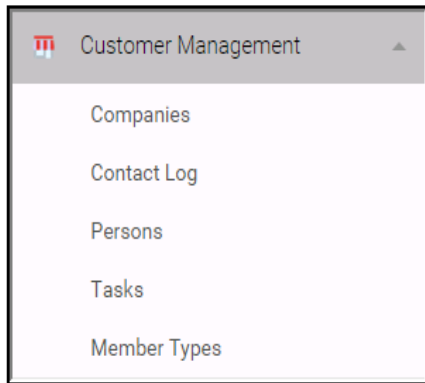
Wizards can easily be built by Developers, and placed on Dashboards by Administrators, to simplify data entry.

Services

A Service represents a specific type of record and its related functions. The Persons Service is the collection of all Persons records, while the Companies Service is the collection of all Companies records. Each record in a Service follows the same format and contains the same type of information. For example, every Persons record has a First Name field but does not contain the Company Type field; the Company Type field is only found in Companies records.

The term, Service, also refers to a location in Aptify from where these records can be accessed. A user would navigate to the Persons Service, or area of Aptify, to create Persons records and employ persons-related features. Services are most commonly accessed from the Applications menu.

From a technical perspective, a Service is known as an **Entity**, which is a database table and its related objects. These tables and objects are where the actual data is stored.



The screenshot above displays the Services associated with the Customer Management Application: Companies, Contact Log, Persons, Tasks, and Member Types. As with Applications, a typical user might have different Services displayed based on their original profile. The displayed Services can be changed by clicking on the gear button in the upper-right hand area of Aptify.

Views

A View displays a specified subset of the records from a service. Persons are the most frequently viewed service in Aptify since that service contains an organization's members.

Examples of typical Persons views:

- Persons with Memberships expiring in 30 Days
- Persons with outstanding balances on their account
- Persons belonging to a particular committee

The most commonly used type of View is the List View, which shows a summary of each record's most important information in a row-and-column format. The View name appears above the grey, data control bar.

Persons - With Committees (BASE VIEW)									
ID	NAME/COMPANY	COMMITTEE NAME	TERM	TERM MEMBER STAR...	TERM MEMBER END ...	TERM ...	ADDRESS LINE 1	CITY	
1	Baldwin, Alesha/Danube Partners	Audit Committee	2012-2013 Audit Committee	01/01/2012	12/31/2013		910 Southwest Union Avenue	Palo Alto	
1	Baldwin, Alesha/Danube Partners	Standards Committee	2012-2013 Standards Committee	01/01/2012	12/31/2013		910 Southwest Union Avenue	Palo Alto	
1	Baldwin, Alesha/Danube Partners	XYZ Committee	2015 XYZ Committee Term	01/30/2014	01/29/2015		910 Southwest Union Avenue	Palo Alto	
5	Yukon, Dacey/Polyhedron Power Devices	Standards Committee	2014 Standards Committee	01/01/2014	12/31/2014		8383 North Colombo Street	Milpitas	
15	Wade, Pamela/Galería del gastrónomo	Audit Committee	2008 Audit Committee	01/01/2008	12/31/2008	Member	Rambla de Catalunya, 23	Tokyo	
15	Wade, Pamela/Galería del gastrónomo	Audit Committee	2002 Audit Committee	01/01/2002	12/31/2002	Member	Rambla de Catalunya, 23	Tokyo	
15	Wade, Pamela/Galería del gastrónomo	Audit Committee	1999 Audit Committee	01/01/1999	12/31/1999	Member	Rambla de Catalunya, 23	Tokyo	
34	Carter, Gary/Clingstone Welding Supply Group, Inc.	Standards Committee	2012-2013 Standards Committee	01/01/2012	12/31/2013		289 East Castillon Street	Lincolnshire	
48	Jackson, Wainwright/Let's Stop N Shop	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member	87 Polk St. Suite 5	San Francisco	
65	Tate, Odessa/Océano Atlántico Ltda.	Audit Committee	2012-2013 Audit Committee	01/01/2012	12/31/2013		Ing. Gustavo Moncada 8585 Piso 20-A	Buenos Aires	
83	Lewis, Ian/Rancho grande	Standards Committee	2012-2013 Standards Committee	01/01/2012	12/31/2013		Av. del Libertador 900	Buenos Aires	
90	Byrd, Quilan/Cottonwood Taping Systems	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member	8991 Monet Street	San Francisco	
150	Pintaro, Yale/Spécialités du monde	Audit Committee	1997 Audit Committee	01/01/1997	12/31/1997	Member	25, rue Lauriston	Paris	
150	Pintaro, Yale/Spécialités du monde	Board of Directors	1999 BOD	01/01/1999	12/31/1999	Member	25, rue Lauriston	Paris	

Users can double-click a row to open a specific record.

Users can also control which data displays in a View by changing its filters that are configured via its properties (See Chapter 4 for more details).

Views do not just display data, they are used to generate reports, perform operations, contact individuals, bulk update specific records, etc.

Views be created in other formats than a List view such as Charts, Calendars, Pivot Grids, Card, and Maps.

Records

A record is a collection of information and may contain details about a particular Person, Company, Order, Product, Meeting, Payment, etc. The information a record contains is divided into sections and stored in fields. A Person's record, for example, lists a person's name, contact information (address, phone number, etc.) and other relevant data about a specific individual. A Company's record, in comparison, lists a company's name, contact information, the number of employees, and any other relevant data. Record layout and fields are covered in greater detail in the Managing Records chapter.

Two types of Aptify records, Persons and Companies, initially display a landing page when accessed. The landing page contains a summary of the record's information as well as functions related to that record.

CONTACT INFORMATION

[Danube Partners](#)
 Alesha Baldwin
 Danube Partners
 919 Southwest Union Avenue
 Palo Alto, CA 94301
 United States
Alesha.Baldwin@demodata.aptify.com
 (650) 750-9187

MEMBERSHIP STATUS

Individual Membership: Member
 Company Membership: Corporate Member
[Dues Information](#)

KEY DEMOGRAPHICS

Voting District: CA
 Certification Expiration:

NOTES/LATEST UPDATES

XYZ Meeting.

MEMBERSHIP TIMELINE

All Activities from Last 3 Months

Activity	Total	Status	Date	ID
Orders	Total \$475.00	Status: Shipped	01/14/2016	ID: 10135
Orders	Total (\$100.00)	Status: Shipped	01/14/2016	ID: 10139
Orders	Total \$250.00	Status: Shipped	01/13/2016 07:5	ID: 10131
Orders	Total \$250.00	Status: Shipped	01/13/2016	ID: 10129
Orders	Total \$80.00	Status: Taken	01/13/2016	ID: 10132
Memberships	XYZ Membership Dues	Status: Active	01/13/2016	ID: 1921

1 - 17 of 17 Items

If a user desires more in depth information regarding one of those two records, they can click the **View Full Record** button in the lower-left hand corner of the landing page to display the entire record. Users may in turn navigate to different areas of that record by clicking the selection drop-down that defaults to Contact in the center of the record.

Name: Alesha Baldwin
 Title: Marketing Senior Director
 Company: [Danube Partners](#)
 Member Type: Member
 Company Member Type: Corporate Member
 CES Score: 30

Contact

- Contact
- Membership
- Committees
- Details
- Functions
- Analysis
- General
- Contact Log
- Contact Count By Year/Category
- Personal
- Incomplete
- Sales By Year/Quarter
- Education
- Complete
- CES Score
- Companies
- Orders
- Awards
- Relationships
- Orders
- Pictures
- Lists
- Quotations
- Comments
- Topic Codes
- All Linked Orders
- Attachments
- Saved Payment Methods
- Subscriptions
- Meetings
- Person Tax Exempt Codes

Primary Email: Alesha.Baldwin@demodata.aptify.com
 Phone: 1 650 750-9187

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Objective

In this chapter, users will learn the basic layout of Aptify by:

- Understanding Basic Aptify Terminology
- Adding and Removing Applications
- Adding and Removing Services
- Working with Favorites
- Viewing the Exception Log

Aptify Display

Overview of Initial Aptify Display

The main Aptify screen, or workspace, is divided into several areas, The Top Tool Bar, a left-side Menu Bar of Applications and Favorites, and the largest portion- the Dashboard. The following is an overview of these primary Aptify areas.

Top Tool Bar

Aptify's browser-based interface includes a tool bar that runs the length of the browser window. This tool bar remains in place to provide persistent navigation features" or "navigation features that are always visible.

The tool bar includes the following functions and information, left to right:



Expansion button: On the left side of the Search bar, the square, 3 lined button enables users to display or contract the Applications.

Quick Search, Global Search and Search History: The Search function enables users to search across multiple services in Aptify or across client linked sources. Search results display in card format. Clicking on an item opens it in a new tab.

Spaces Alert Indicator (Bell): When a user is tagged in a Spaces thread, this icon flashes an alert.

Favorites Menu (Star): Users can create their own Groups of Favorited Views. Extremely useful for shortcutting repeatedly accessed Views.

Settings Button (Gear Button): Enables the user to configure their screen's appearance by hiding and showing applications, closing tabs, viewing exception logs, etc. This button will be covered in greater detail later in this chapter.

User Login Status (Online of Offline) (Circle) : Indicates whether the user is currently connected to the Aptify database and can work with records or view information. Green indicates an online states, orange is disconnected. Clicking the text by the circle when offline will attempt to refresh the connection.

Under the far left dropdown arrow:

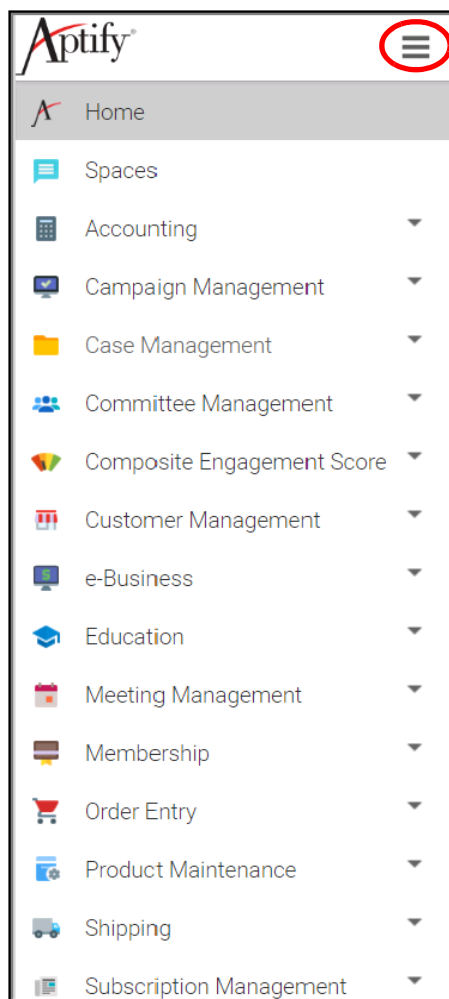
- **Community Site (Aptify A):** The Aptify Community Site provides access to discussions, documentation and e-Learning videos, and facilitates cooperation with other organizations utilizing Aptify.
- **Messenger Icon:** When selected will display a messaging box that enables users to quickly text each other while online.
- **Logout button:** Used to exit Aptify.

Applications

Applications

The left side of the Aptify workspace contains a menu containing all selected Aptify Applications. When the downward facing arrows are expanded next to each Application, they display that Applications associated **Services**.

This tab may be hidden or displayed by default, but can be unpinned to enable more screen workspace by clicking on the circled icon in the upper right hand side of the section.



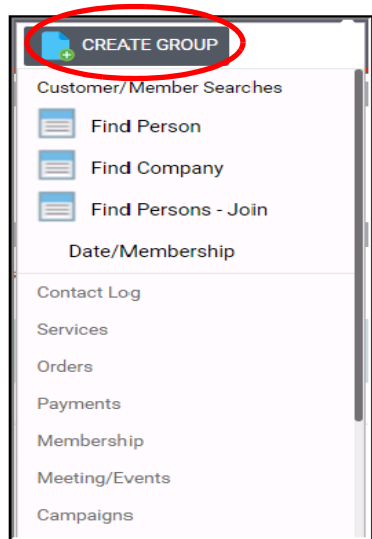
Favorites

Favorites are links that enables users to open frequently used views or records with a single click. They are useful for quickly accessing important data. Favorites should be part of a user-profile and based on the profile's department/function.

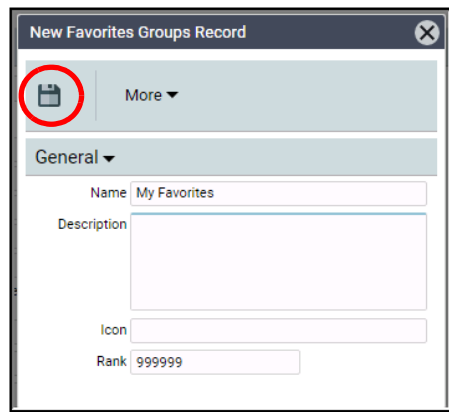
The Favorites menu is accessed by clicking the **Favorites** button (with a star icon), from the far, upper right hand button menu. Users can mark a view as a favorite using the **More** dropdown and selecting Add to Favorites. This option is located on every displayed View. Once chose for a view or record, that item will under the Home Group, under the Favorites Star. Clicking on a favorited View from a Group opens that View.

Creating a Favorite Group

1. Click the **Favorites** button (star).
 - Users will observe several pre-existing Favorites Groups and Favorites.

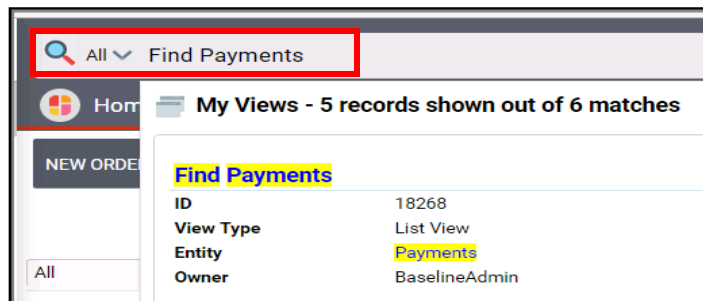


2. Click the **Create Group** button.
3. In the Group **Name** field, enter **My Favorites**. A Description, Icon and Rank can be entered, but for now, leave these fields blank.
4. Click **Save**.
5. The group name appears in the **Favorites** column.

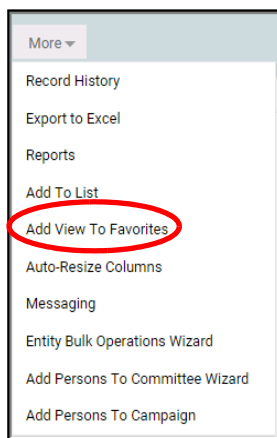


Adding a Favorite

1. In the **Quick Search**, enter **Find Payments** - Click **Find Payments** view that displays.



2. From the view, click the **More** button. From drop-down, click **Add View to Favorites**.

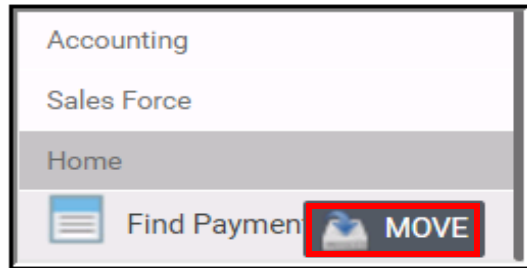


3. Click the **Favorites** button.
4. Click the Favorites group, **Home**, to see the **Find Payments** view.
5. Click the view to open it.

Moving a Favorite

Items default to the **Home** Group, but can be moved to another **Favorites** Group.

1. Click the right side of **Find Payments**. When the **Move** button appears, click it.

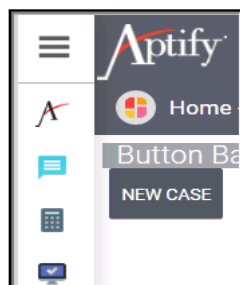
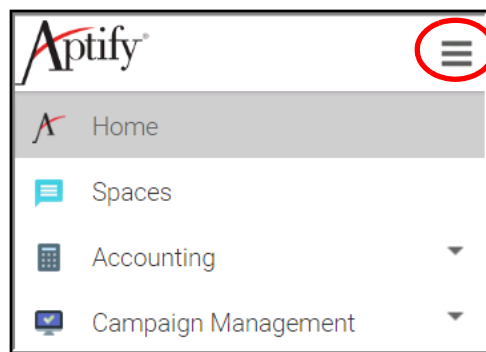


2. On the Select Group screen, enter **My Favorites**, click **Select**.
3. **Refresh the Browser window** - this is necessary to cache the new Favorite.
4. Click **My Favorites** to see the **Find Payments** view.

Displaying/Not Displaying the Applications Menu

Favorites makes it easy to quickly find a particular record or view no matter where a user is in the system, as the Applications Menu bar will remain visible unless hidden using the Display button. When clicked to hide, it frees up screen space to display dashboards and other data.

5. On the right side of the Applications menu, click the display button (once, not double-click). The panel slides to the left.



Settings Button

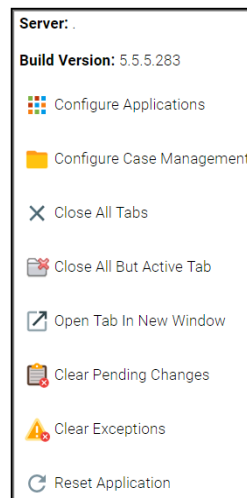
The **Settings** (gear) button displays menu enabling users to control various Aptify functions.

1. Click the **Customer Management** application.
2. Click the **Settings** button from the upper right corner of Aptify display.

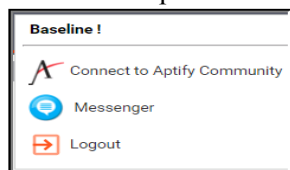


3. The following menu displays:

- **Server:** Indicates the server the user logged into.
- **Build Version:** Indicates the current version number of Aptify.
- **Configure Applications:** Adds/removes Applications from the Menu Bar.
- **Configure Customer Management:** Opens the Application the user has currently accessed (Customer Management). This option only appears when an Application is selected in the Menu bar.
- **Close All Tabs:** Closes all open tabs.
- **Close All But Active Tab:** Closes every tab except selected one.
- **Open Tab in New Window:** Opens the current tab in a new browser window; useful for comparing data side-by-side.
- **Clear Pending Changes:** Undoes pending changes that have not yet been saved.
- **Clear Exceptions:** Removes all items from the Exception Viewer.
- **Reset Application:** Closes all tabs, refreshes Aptify, & returns to Home
- **Logout:** Exits Aptify.



4. Click the dropdown arrow to the right: an auxilliary menu displays:



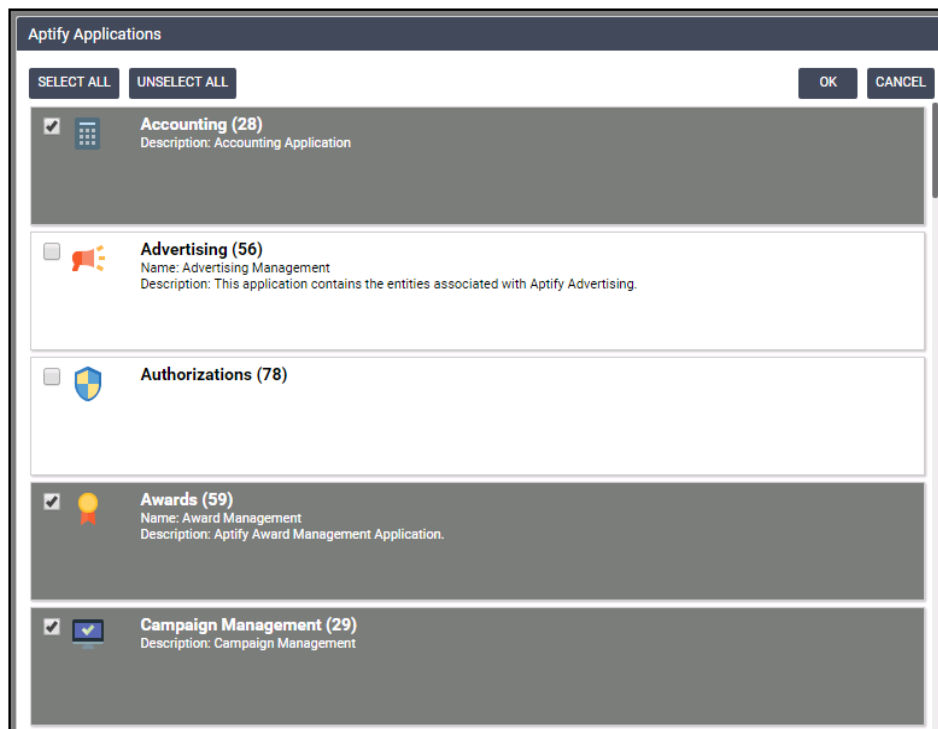
- **Connects to Aptify Community:** User can access Aptify's online Community
- **Messenger:** Enables user to communicate directly to any other Aptify user.
- **Logout**

Managing Settings

Managing Applications

Users can add and remove which applications display in the Applications menu to simplify the list. Removing an application from the list does not delete any data, just the availability from the display screen. (After “go-live” time frame, most users will not need to employ this feature as their account should already contain all necessary items). Users can return to the Home dashboard at any time by clicking the **Home** item at the top of the menu.

1. From the **Settings** button, click **Configure Applications**. Scroll to see the list.
 - Applications are added/removed by selecting/de-selecting the Application name from the menu.
 - Those that appear in gray are currently displayed on the user’s screen and those in white are available, but not currently visible.
2. Click the **Chapter Management** Application to select. It now appears as gray.
3. Click to de-select **Product Management** and **Shipping**.



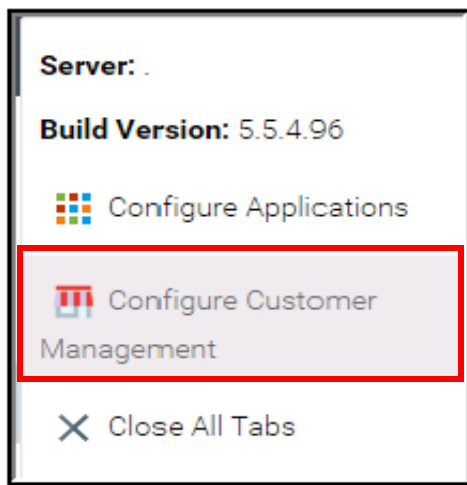
4. Click **OK**.
 - Note the change in Applications displayed in the left side screen **Applications** column.

Managing Services

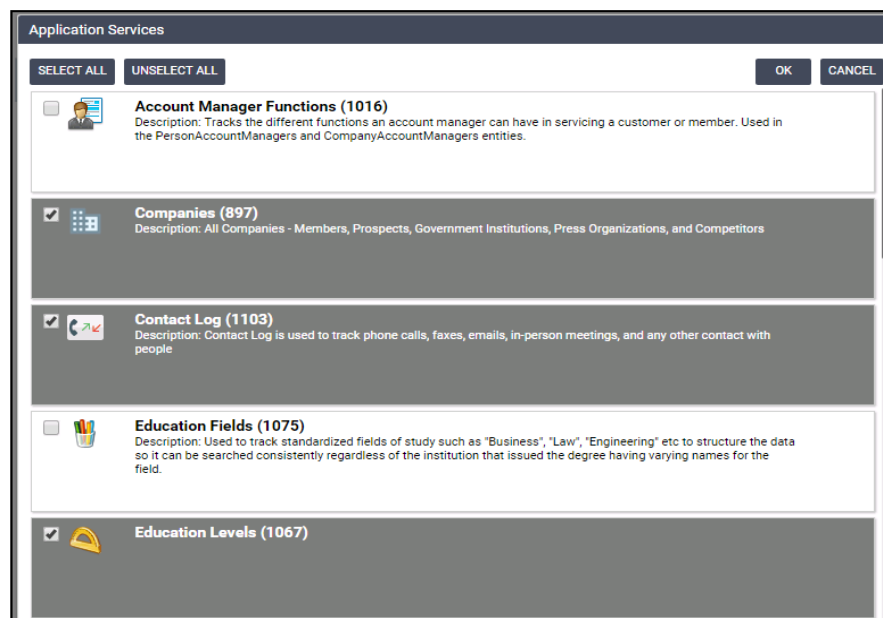
Services can be added or removed from displaying within Applications to save space and provide ease in locating them. The process is similar to managing application display.

In this exercise, add the **Functions** service to the Customer Management application.

5. From the **Menu bar**, click **Customer Management** to make it the active application.
6. Click the **Settings** button. The Application now displays in the settings column.
7. Select **Configure Customer Management**.



8. From Application menu, click the **Education Levels** service to add.
9. Click **OK**.



10. **Education Levels** service appears listed under **Customer Management** Application.

Quick & Global Search

Quick Search

Aptify enables users to find records, views, wizards, attachments, etc. by using the Quick Search feature. Quick Search is an effective tool for immediately locating records as it:

- Always remains visible at the top of the Aptify interface
- Initially returns the first 5 records of any type of record
- Can be targeted for specific types of records
- Provides the user with a total number of available records
- Is linked to the Global Search by use of the More button

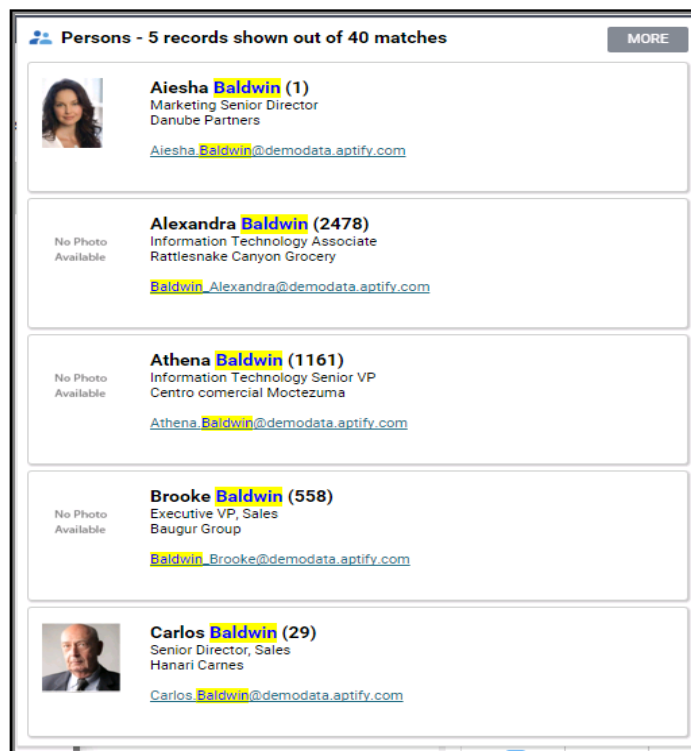
Use the **Quick Search** feature to locate Aiesha Baldwin's **Persons** record.

1. Click in the **Quick Search** box at the top of the screen.
2. Type **Baldwin**.

- **Do NOT select Enter or Tab**



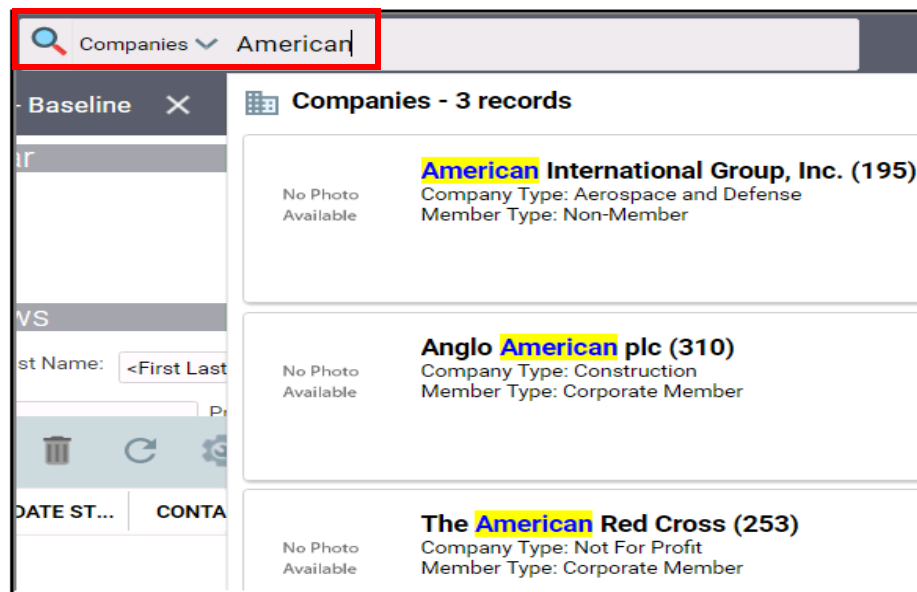
3. **Results appear in Card format:**



Narrowing Search Results

Search Results can be narrowed by using the drop-down list to the left.

1. Click the **arrow** next to the **search bar** to open a drop-down list.
2. Select **Companies** to search only within the Companies service.
3. Click in the **search box** and enter **American**.
 - A list of matching Companies records appears.



To search and select a particular view:

1. Click on the **All** dropdown on left of **Quick Search** box.
2. Scroll to click **Views**.
3. Enter **25 Random People**.
4. From results click the view name to run the view.

Search using “Contains”

Including a percentage sign, “%”, before your search text queries for results using the “contains” parameter.

Users should limit their use of the contains operator since doing so can increase the time it takes to return search results.

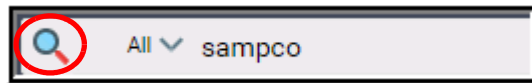
Global Search

More comprehensive searches can be conducted using the Global Search option.

Global Search enable users to:

- Return ALL results for search criteria, not just the first five of Quick Search
- Filter the Search results by recognized Categories
- Page through results

1. In the Search field, enter **Sampco**.
2. Ignore the Quick Search results.
3. Click on the **Magnifying Glass** button to the left of the **Search** box.



4. Note the various **Categories** which are included in the returned information.

 A screenshot of the search results page. At the top, the search term 'sampco' is entered in a search box, with a 'SEARCH' button and a magnifying glass icon to its right. Below the search box, it says '65 records found matching "sampco" (0.66 seconds)'. On the left, there is a 'Categories' section with a red box around it. The categories listed are:

- Employees (23 records)
- Organizations (6 records)
- Products (29 records)
- Meetings (7 records)

 Below the categories is a 'Group By Category' checkbox which is unchecked. On the right, there are two result cards. The first card is for 'Lewis Oppenheimer (21)', showing 'No Photo Available', his title 'Director, Sampco Education', 'Sampco University', and email 'lewis.openheimer@education.sampco.com'. The second card is for 'Sampco 2014 Annual Conference', showing details: ID 41, MeetingID 41, ProductID 9926, Product 'Sampco 2014 Annual Conference', Start Date 12/01/2014, End Date 12/05/2014, and Description 'Sampco 2010 Annual Conference'.

Search History:

Users can also access their Search History and re-run those queries.

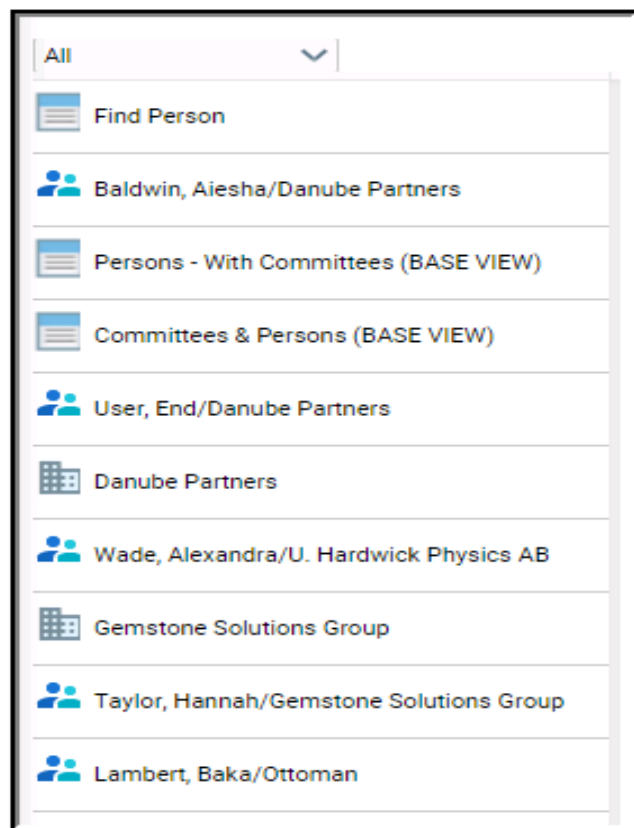
- Click the Magnifying Glass with the Clock button, located to the right of the search box. The search history will display the previously selected search results in a new tab.



Most Recently Used Records and Views

Located to the right of the Favorites column, the **Home** dashboard includes a **Most Recently Used** records component, which by default, displays all the most recently opened records or views. Administrators can modify each department Dashboard's most recently used component to only display certain types of records. In addition, administrators can specify the number of records shown before newly opened items replace the oldest items listed.

Note that the icon shown to the left of an item can be used to identify whether the item is a view or a record from a particular service.



Clicking an entry in the Most Recently Used records opens the item, and is a quick and useful way of accessing data.

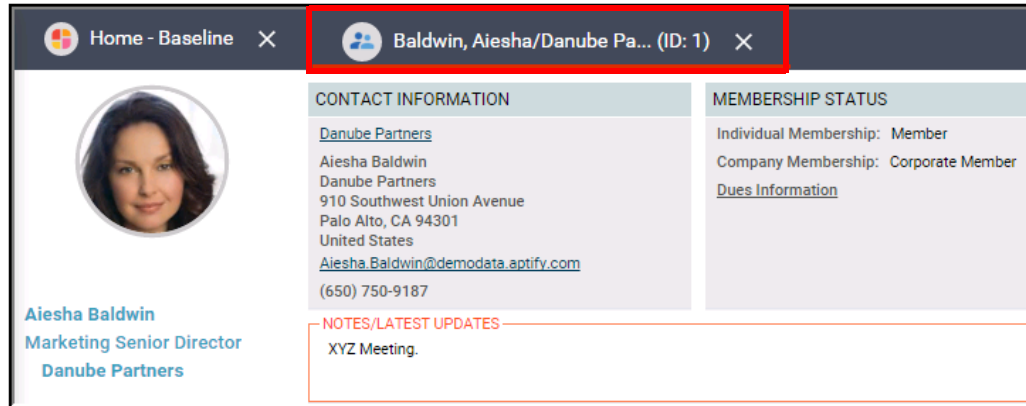
1. Click the drop-down arrow to the right of **All**.
2. Note the icon for the type of items in the list.
3. Click to select **Views**.

Tabs

Whenever a user opens a record, view, or dashboard, it displays under its own tab.

If multiple items are opened, each new item’s tab will appear next to the previous tab, similar to the way multiple websites appear when using tabs in a web browser.

The currently selecte tab displays with a red underline.



Users can close a tab by clicking the “x” located in a tab’s upper-right corner and open another by clicking on the name. Users can switch to an existing tab by clicking in a separate browser window to more easily compare data.

1. Click the **X** to close the **Home-Baseline** tab.
2. Click the **Settings** button to display the drop-down menu.
3. Observe the Tab options:
 - **Close All Tabs**
 - **Close All But Active Tab**
 - **Open Tab in New Window**

Summary

- Applications and Favorites can be configured by the user.
- The Menu bar and Settings button are used to navigate Aptify and change settings.
- Quick Search is the most effective method for locating records, views, attachments, etc in Aptify.

Record Management

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Objective

Records represent a basic block of information in Aptify.

In this chapter, users will learn how to:

- Read, edit, and save a record
- Create Persons and Companies records
- View Record History
- Add a record to Favorites

Records

Overview

In Aptify, a record refers to a specific set of information, while a record's form is the display of that data and accompanying buttons for the user interface, such as Save and Delete. All record forms follow a common format and employ similar features.

Record Areas

Once records are saved - usually with a Name, Address, or other minimally required fields - they are stamped with a unique SQL Row ID and all of the Record Areas: tabs, fields, and functions become available. All records contain the following features:

Record Name and ID: Each record in a service has a name and a unique ID within that service. Records in other services may use the same number. When saved, a record is given the next sequential ID number which displays in the new tab.

Button Bar: Every top-level record contains a row of buttons above its information that is used for saving the record and accessing other common functions.

Fields: Includes any area where the user can input information. Fields are covered in greater detail later in this chapter.

Sections: Records may display multiple areas that organize a record's information into categories. Sections typically contain additional fields or views of related records. They are accessed through a section heading bar that displays the name of the currently visible section.

More Dropdown

Each record contains a **More** drop-down menu. The More drop-down menu allows the user to access the following features and functions:

Changes - Displays the changes made since the record was last saved.

Print Record - Opens the Report Wizard which allows the user to generate and export reports that contain the record's data.

Add To List - Adds the record to a designated List, which is a static collection of records from a particular service

Record Cloning - Clones the record with an temporary designation of (ID:-1). Enables users to quickly create an identical copy of the record initially opened. Useful for similar Contact Logs, Cases, Classes, etc.

Open in New Window - Opens the record in a new browser tab, which in Chrome, can be dragged into a separate window. This can be useful for comparing the record side-by-side with another record.

Add To Favorites - Adds the record to the Favorites area for ease of access. This becomes a Remove From Favorites on a record that has been previously Added.

Load from Template - Enables users to add records with predetermined information

Data Control Bar

Displays across top of **all** records. The Data Control Bar contains the following functions::

Save: Saves the record and keeps the record open.

Save and Close: Saves and closes the record.

Save and New: Saves the record and opens a new record in its place.

Delete: Deletes the record. This option only appears when the user has been given the appropriate permission. If a record has dependencies (records that link back to the current record) the delete function will notify the user that the record cannot be deleted.

View Record History: If enabled for the service, displays a log of the changes made to the record.

Refresh Record: Undoes changes done to the record since initially opened.

Record Field Types

Users enter data into record fields, which are typically empty rectangular areas that can accept text, dates, numbers, or pre-determined list options. Fields can also display as check-boxes.

Some fields may be required to be completed before a record can be saved. Fields may also contain "validation" where the data entered must meet certain criteria.

The following are some of the most common types of fields:

Text Field: Accepts standard letters and numbers. Some text fields may allow users to include multiple lines or HTML formatting. Text fields can also contain email addresses or websites.

Numeric Field: Accepts integers or if specified, decimal values.

Date Field: Stores either a date, or a date with time. These fields have an adjacent Calendar button that enables users to select a date from a calendar display, rather than typing in the value.

Drop-down List: Stores a selection of values for a user to choose from a list. These fields sometimes allow a user to type in their own value.

Check box: Can be clicked to select or un-select to indicate a choice.

Link Box: Connects the currently opened record to another service's record. For example, a Persons record often links to the Companies record they work for.

- Clicking a linked field with a value opens the corresponding record.
- Clicking a linked field with a blank value creates a new record and, if saved, enters the new record into the linked field.
- Users can search for an existing related record and populate the field with it.

Creating a New Record

A new record can be created from several locations:

- From a Dashboard Button
- From a Service
- From an Existing Record

The **New** button will be indicated by the following text (Persons example) and is located on the right hand side of every Service:



Persons and Companies

Persons and Companies are the two most commonly used record types. They represent the individuals or businesses with which an organization has a relationship.

Persons: Represent any individual for whom your organization needs to store and track information. Most persons records might be members and store membership information, but can also represent vendors, points of contact, government officials, etc.

Companies: Most commonly represent members' and customers' business contact information, but can also include vendors, suppliers, contractors, or other businesses.

- A Persons record can be linked to Companies record to show association with the company. A Persons record can also exist independently of a company.
- Both the Persons service and the Companies service can be accessed from various applications, most commonly via **Customer Management** application.

Record Landing Page

When a previously created Persons or Companies record is opened, it displays a landing page. Landing pages are currently available for both Persons and Companies records. Landing pages provide a variety of information in non-editable, summary form. They also enable quick access to commonly used functions under an **Actions** menu on the left side.

The landing page provides an optional **Photo** location along with **Contact Information**, **Membership Status**, and **Key Demographics** information across the top. Each of these areas contains underlined, linked fields which provide further information when the mouse cursor is hovered over the link. Users can also click the link to open the specified record.

The middle section contains **Notes/Latest Updates**. This displays the latest changes to the record.

The third section contains an interactive **Membership Timeline** where users can filter by All, Orders, Contact Logs, Subscriptions, or Membership records related to the record. Users can search records over Last 3 or 6 Months, Last 1 or 5 Years, or enter a desired Date Range.

Underneath the Photo section is a **CES** (Customer Engagement Score) indicator. CES will be explained later in the course but it represents an aggregate “score” of the member’s activity.

Below that is an **Actions** section containing buttons that enable users to Send Message (via email), Create Order, Add Contact Log, Add New Membership, and to View Full Record.

The screenshot displays a record landing page for Aiesha Baldwin. The page is organized into several sections:

- Contact Information:** Includes a profile picture, name (Aiesha Baldwin), title (Marketing Senior Director), company (Danube Partners), address (910 Southwest Union Avenue, Palo Alto, CA 94301, United States), email (Aiesha.Baldwin@demodata.apify.com), and phone number ((650) 750-9187).
- Membership Status:** Shows Individual Membership: Member and Company Membership: Corporate Member, with a link to Dues Information.
- Key Demographics:** Shows Voting District: CA and Certification Expiration.
- Notes/Latest Updates:** A section titled "NOTES/LATEST UPDATES" containing a single entry: "XYZ Meeting".
- Membership Timeline:** A section with a filter dropdown set to "All Activities" and a date range dropdown set to "Last 3 Months". It displays a list of activities:

Activity Type	Date	Total	Description	Status
Orders	01/14/2016	Total \$475.00	XYZ Meeting	Shipped
Orders	01/14/2016	Total (\$100.00)	XYZ Meeting	Shipped
Orders	01/13/2016 07:5	Total \$250.00	XYZ Membership Dues	Shipped
Orders	01/13/2016 7:00 AM	Total \$250.00	XYZ Membership Dues	Shipped
Orders	01/13/2016	Total \$80.00	XYZ Product	Taken
Memberships	01/13/2016	XYZ Membership Dues	Active	Active
- Actions:** A vertical list of buttons: Send Message, Create Order, Add Contact Log, Add New Membership, and View Full Record.
- CES Score:** A gauge showing a score of 30 out of 100.

Create a Companies Record

In this exercise, users will create a **Companies** record which will be used throughout the remaining exercises in this manual.

1. Click the **Home** dashboard tab.
2. Click the **New Companies** button.

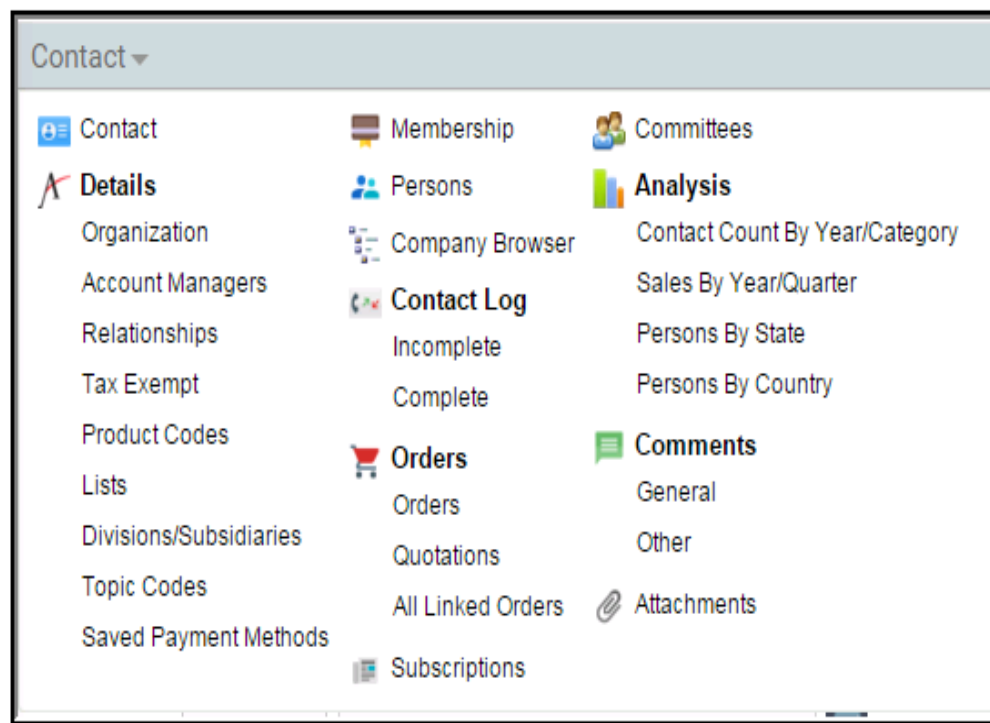


- A new Companies record opens in another tab.
3. In the **Name** field, enter a fictitious **company name**.
 - Required fields are indicated by the red border.
 4. From the **Company Type** drop-down list, select **Not For Profit**.
 5. Under the **Contact** heading, enter fictitious **Address Information** including the street, city, state and zip code.
 6. Under the **Main Phone** drop-down list, enter a fictitious **Phone Number**.

A screenshot of a web application form titled "NEW COMPANY". The form is divided into several sections. At the top, there is a toolbar with icons for save, delete, add, refresh, and warning, along with a "More" dropdown. The main form fields include: "Name" (text input with "XYZ Corporation" entered), "Parent" (text input with a search icon and a green plus icon), "Company Type" (dropdown menu with "Other For Profit" selected), and "Account Manager" (text input with a search icon and a green plus icon). Below these is a "Contact" section with a dropdown menu. Under "Contact", there are fields for "Street Address" (dropdown), "Line 1" (text input with "1500 Demo Drive" entered), "Line 2" (text input), "Line 3" (text input), "City, State ZIP" (text input with "Salt Lake City", "UT", and "90152" entered), "Country" (text input), "Country" (dropdown menu with "United States" selected and a "Bad Address" checkbox), "Pref. Bill Addr." (dropdown menu with "Street Address" selected), "Pref. Ship Addr." (dropdown menu with "Street Address" selected), "Main Phone" (dropdown menu), "Main Em..." (text input with a dropdown menu and a blue checkmark icon), "WebSite" (text input with a blue checkmark icon), and "Billing Contact" (text input with a search icon and a green plus icon).

7. Click **Save**.

8. Click the **Contact** heading to open the record's **Section menu** as shown below:



9. Under the **Details** heading, select the **Organization** menu item.
- A new section appears and the Contact section is hidden.
10. From the **Credit Status** drop-down list, select **Approved**.
- This enables any Person linked to the company to use Purchase Order Payment Method when placing an order.
11. In the **Credit Limit** field, enter **2000**.
- This sets the maximum amount that can be purchased on credit.

 A screenshot of a form titled 'Details > Organization'. It contains two fields:

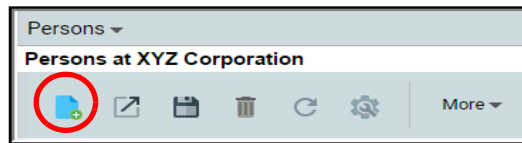
- Credit Status**: A dropdown menu with 'Approved' selected.
- Credit Limit**: A text input field containing '\$2,000.00'.

12. Click **Save**.

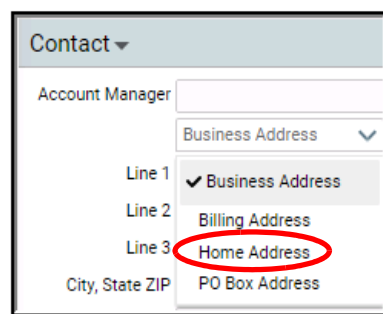
Create a Persons Record

In this exercise, create a Persons record from the Companies record so that it will be linked to the company.

1. From your **Companies** record, click the **Details > Organization** heading.
2. Select **Persons**.
3. Under the **Persons** heading, click the **New** record button:

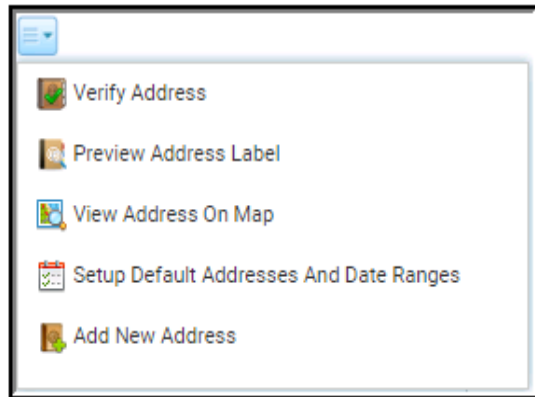


4. A new Persons record appears under a new tab.
 - Observe the Company field and address information are already completed; Aptify populates a Person's business address using their company's information.
 - Users can also create a new Persons record directly from the Persons service.
5. In the **First Name** and **Last Name** fields, enter a **Name**.
6. In the **Title** field, enter a **Job Title**.
7. Click **Business Address** to show the other available address fields.
8. Select **Home Address**.

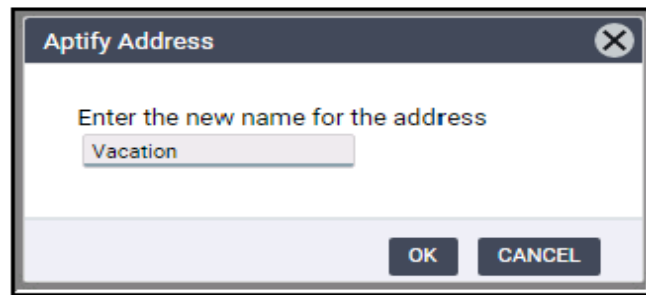


9. Enter a **Fictitious Home Address**.
10. Click the square **Address Options** button next to the Address Selector drop-down list.

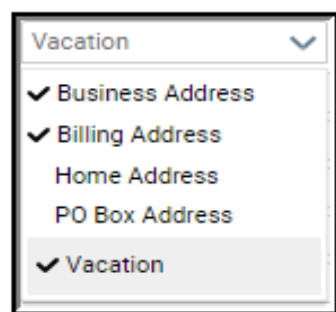
- From the drop-down list, select **Add New Address**.



- In the **Aptify Address** dialog that appears, enter **Vacation**.



- Click **OK**.
 - A blank **Contact** area of your **Persons** record displays.
- In the **address** fields, enter a fictitious **Vacation** address.
- Click **Save**.
- Click the **Address Selector** drop-down list.
 - Once the record is saved, a check mark appears next to any addresses that have information entered.
- Click the square **Address Options** button.



- Select **Setup Default Addresses and Date Ranges**.

19. For the **Vacation** Address, enter the following settings:
- **Address Type: Vacation**
 - **Setting: Date Range**
 - **Start Date: 06/1/20xx** (where xx is the current year)
 - **End Date: 08/31/20xx** (where xx is the current year)

ADDRESS	ADDRESS TYPE	SETTING	START DATE	END DATE
Business Address	Name	Never		
Billing Address	Name	Never		
Home Address	Name	Never		
PO Box Address	Name	Never		
Vacation	Name	Date Range	06/01/2016	08/31/2016

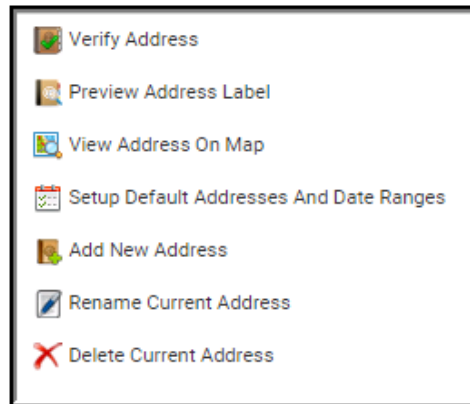
OK CANCEL

20. Click **OK**.
21. Click **Save**.

Address Options

Address Options Button

The Contact section of a Companies or Persons record stores all the addresses for a company or person. These addresses are available when selecting a **Ship To** or **Bill To** address from an order. Clicking the Address Options button accesses additional address-related features:



- **Verify Address:** If an integrated third-party address verification system, such as Melissa Data, is installed, Aptify will check the accuracy of the address entered.
- **Preview Address Label:** Shows how the address will look when printed.
- **View Address On Map:** Displays address in separate tab using [Google Maps](#).
- **Setup Default Addresses And Date Ranges:** Opens a menu where users can specify when an address should be used automatically.
- **Add New Address:** Creates a new address location.
- **Rename Current Address:** If a user-created address is selected, this option appears and allows the user to rename the address.
- **Delete Current Address:** If a user-created address is selected, and the user has delete permissions, this option appears and allows the user to delete the address.

Bad Addresses

An address can be labeled as inaccurate using the **Bad Address** check box.

Users can create views of records with bad addresses and contact the company or person to obtain the correct address.

A screenshot of an address form. It includes fields for 'City, State ZIP', 'County', and 'Country'. The 'Country' field is set to 'United States'. A checkbox labeled 'Bad Address' is located at the bottom right of the form and is circled in red.

Assigning Credit Available

For a Persons or Companies record to utilize a Purchase Order payment to order a product they must have credit designated on their Person or Companies record.

1. From the persons record, click the **Contact** heading and then select **General** under the **Details** heading.
 - A new section appears and the Contact section is hidden.
2. From the **Credit Status** drop-down list, select **Approved**.
3. In the **Credit Limit** field, enter **\$1,000.00**.
 - This sets the maximum amount that can be purchased on credit for orders.
4. Click **Save**.


The screenshot displays the 'Details > General' form for a person or company record. The form includes several input fields and dropdown menus. A red box highlights the 'Credit Status' and 'Credit Limit' fields. The 'Credit Status' dropdown is set to 'Approved', and the 'Credit Limit' field contains '\$1,000.00'. Other visible fields include 'Nickname', 'Department', 'Supervisor', 'Assistant Name', 'Referred By', 'Referral Type', 'GL Order Level', 'GL Payment Level', 'Pref. Communication', 'Preferred Currency', 'Old ID', 'Old Company ID', and 'AP Vendor'. A 'Ranking' slider is also present at the bottom of the form.

Field	Value
Nickname	
Department	
Supervisor	
Assistant Name	
Referred By	
Referral Type	
GL Order Level	Regular
GL Payment Level	Regular
Pref. Communication	Phone
Preferred Currency	US Dollar
Old ID	
Old Company ID	
Ranking	0
Credit Status	Approved
Credit Limit	\$1,000.00
Credit Currency	US Dollar
AP Vendor	

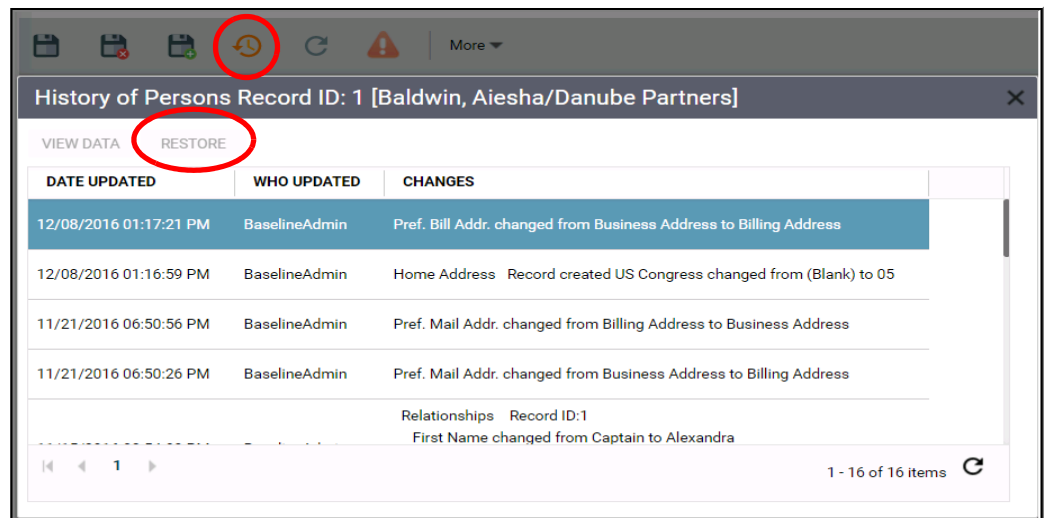
Review Record History

Record History allows a user to see a record's former values, the changes that have been made, when they were made, and the user who made the changes. In this exercise, use the **Record History** feature to view previous versions of a record.

1. Open your **Persons** record, if not already opened.
2. From the **Contact** section, at the bottom of the record, change the **Phone** drop-down list to **Cell Phone**.
3. In the **Cell Phone** field, enter **1 555 555-5555**



4. Click **Save**.
5. Using the Phone drop-down list, enter a **Fax** number of **123- 123-4567**.
6. Click **Save**.
7. From the **Data Button bar** at the top of the record, click the **Record History** button.
8. Observe the record history window that displays displays, which shows when the record was changed, who made the change, and the details of the change..



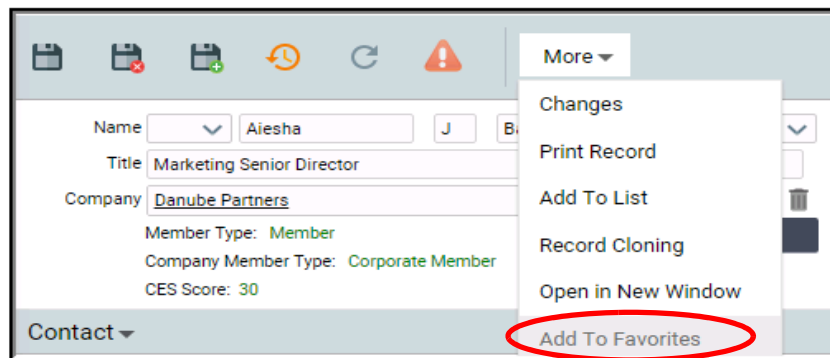
DATE UPDATED	WHO UPDATED	CHANGES
12/08/2016 01:17:21 PM	BaselineAdmin	Pref. Bill Addr. changed from Business Address to Billing Address
12/08/2016 01:16:59 PM	BaselineAdmin	Home Address Record created US Congress changed from (Blank) to 05
11/21/2016 06:50:56 PM	BaselineAdmin	Pref. Mail Addr. changed from Billing Address to Business Address
11/21/2016 06:50:26 PM	BaselineAdmin	Pref. Mail Addr. changed from Business Address to Billing Address

9. Users with Admin rights in the system can also click on a previous Updated row, and click the **Restore** button to revert a record it's previous saved data.
10. Click **X** to close the record history window.

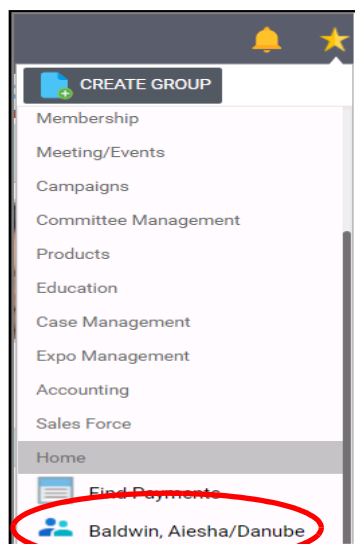
Add a Record to Favorites

Favorites enables a user to quickly access any record in Aptify. In this exercise, add a Persons record to Favorites, close the record, and re-open it using the Favorites menu.

1. Open your **Aiesha Baldwin's** record, if not already opened.
2. From the **Data Control bar**, click the **More** button.
3. From the drop-down list, select **Add To Favorites**.



4. **Close** the record.
5. From the **Menu bar**, select **Favorites**.
6. Click the **Home** group from under **Favorites**.
 - The Aiesha Baldwin's record is automatically added to the **Home** group.



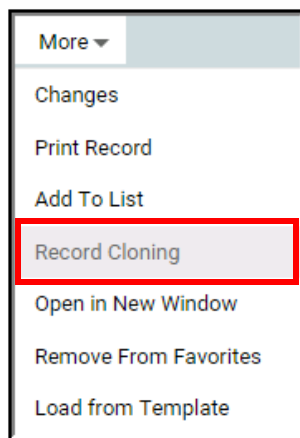
7. Click your **Persons** record to open it.
 - Users can remove a record from Favorites by clicking the **More** button and selecting **Remove From Favorites**.

Cloning Records

The Clone Records feature makes an exact copy of an existing record's top-level data. This is useful when users need to create multiple records that share many of the same values, except for a few minor changes, thus reducing data input time and preventing errors. Subtypes linked to the record will be cloned but linked records will not.

Follow the steps below to clone a record:

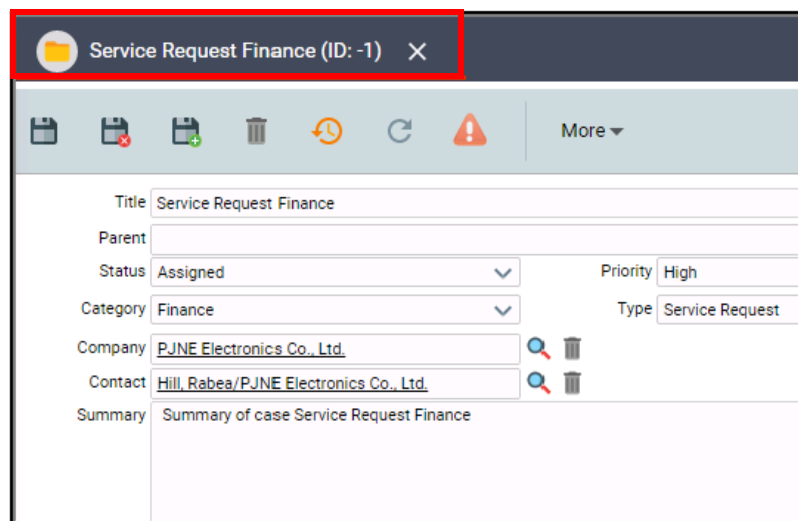
1. Enter Service Request in the Quick Search field.
2. Double-click on the first returned record: Service Request Finance.
3. Click the **More** button at the top of the record, then select **Record Cloning**.



4. The new record (clone of the original) opens.

Note: The original record is replaced with the cloned version of the record, indicated by the "(ID: -1)" in the record's tab. The record is assigned its actual ID once it is saved.

5. **Save and close** the record.



Wizards

Creating new records can be accelerated and simplified by using Wizards. Wizards can be accessed via Dashboard buttons for each access. Base Aptify includes many wizards for common tasks, such as creating new orders or memberships, and Developers can create additional wizards as desired..

Wizard Benefits:

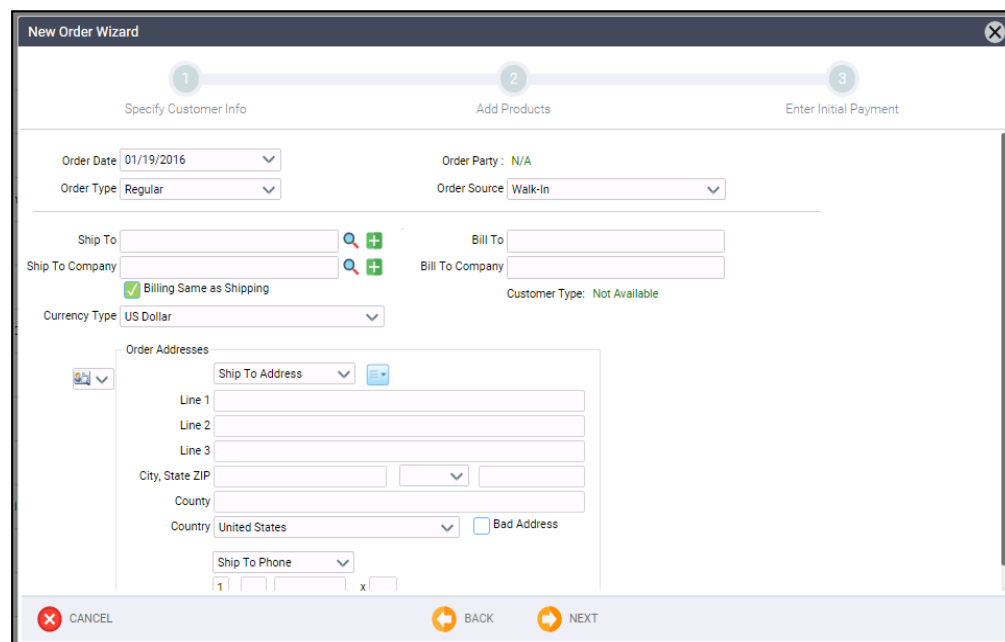
- Speed
- Ease of use
- Data integrity

1. From the **Home** dashboard, click the **New Order Wizard** button.



2. **Observe:**

- Steps to enter information are designated across top of the window.
- **Next** and **Back** buttons are located on the bottom of the window.

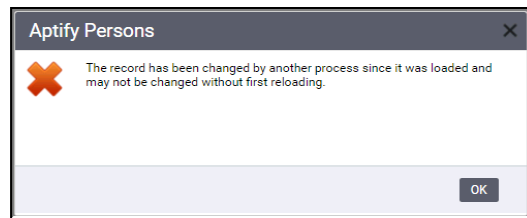
A screenshot of a web application window titled 'New Order Wizard'. At the top, a progress bar shows three steps: '1 Specify Customer Info', '2 Add Products', and '3 Enter Initial Payment'. The 'Specify Customer Info' step is active. Below the progress bar, there are several input fields: 'Order Date' (01/19/2016), 'Order Type' (Regular), 'Order Party' (N/A), and 'Order Source' (Walk-In). There are also fields for 'Ship To' and 'Bill To' with search icons and plus signs. A checkbox for 'Billing Same as Shipping' is checked. 'Currency Type' is set to 'US Dollar'. Below these is a section for 'Order Addresses' with a dropdown for 'Ship To Address' and fields for 'Line 1', 'Line 2', 'Line 3', 'City, State ZIP', 'Country' (United States), and 'Ship To Phone'. At the bottom of the window, there are three buttons: 'CANCEL' (with a red X icon), 'BACK' (with a left arrow icon), and 'NEXT' (with a right arrow icon).

3. Click **Cancel** - users will complete this wizard in the Orders chapter.

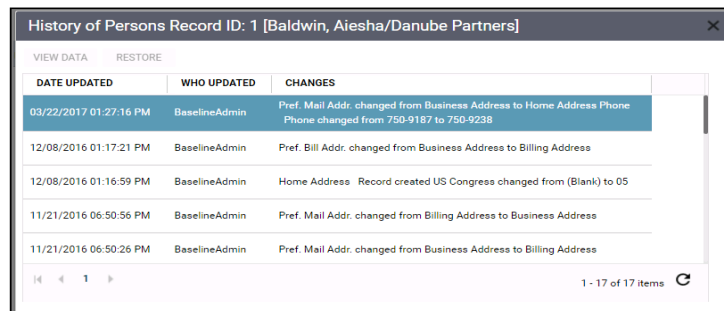
Handling Duplication in Aptify

The Conflict Warning

Within Aptify, two users may work with the same record simultaneously. However, it is possible that the changes made by the users to the record may conflict with each other. Therefore the Conflict message below will launch automatically whenever one user attempts to save a record that has been modified by another user since the form was opened.



Users can then consult the Record History of the record to see what the other user has changed.

A screenshot of a dialog box titled "History of Persons Record ID: 1 [Baldwin, Aiesha/Danube Partners]" with a close button (X) in the top right corner. Below the title are two tabs: "VIEW DATA" and "RESTORE". Below the tabs is a table with three columns: "DATE UPDATED", "WHO UPDATED", and "CHANGES". The table contains five rows of update history. At the bottom left of the table are navigation arrows and the number "1". At the bottom right is the text "1 - 17 of 17 items" and a refresh icon.

DATE UPDATED	WHO UPDATED	CHANGES
03/22/2017 01:27:16 PM	BaselineAdmin	Pref. Mail Addr. changed from Business Address to Home Address Phone changed from 750-9187 to 750-9238
12/08/2016 01:17:21 PM	BaselineAdmin	Pref. Bill Addr. changed from Business Address to Billing Address
12/08/2016 01:16:59 PM	BaselineAdmin	Home Address Record created US Congress changed from (Blank) to 05
11/21/2016 06:50:56 PM	BaselineAdmin	Pref. Mail Addr. changed from Billing Address to Business Address
11/21/2016 06:50:26 PM	BaselineAdmin	Pref. Mail Addr. changed from Business Address to Billing Address

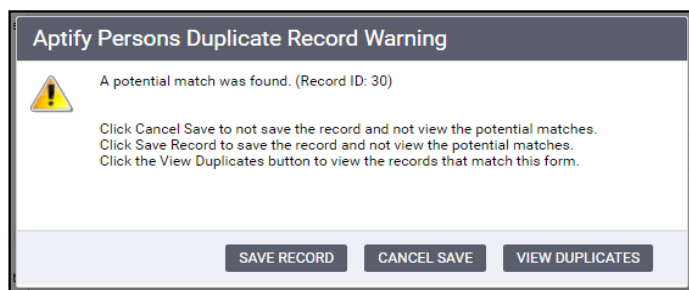
The User will then have to reload the record and make the changes again to the record.

Resolving Duplicate Records

An organization can customize Aptify to check for possible duplicates when users save new records. This helps avoid a situation where the same person has multiple records within the system.

By default, Aptify provides a duplicate checking component for the Persons service. This is provided for demonstration purposes so an organization's developers can create their own duplicate-checking components as necessary.

When a message is received about a possible duplicate, choose one of the following options:



Save Record: Click to save the new record without seeing the potential match.

Cancel Save: Click to return to the record without saving.

View Duplicates: Click to view the record or records that may be duplicates of the record a user is attempting to save. If only one potential duplicate exists, the matching record will open. If more than one duplicate exists, Aptify will display a view that lists the matching records. If duplicate records exist, a user can **merge** them into single record - see next page.

Merging Records

If duplicate records are detected already in the database, an administrator level user can merge the records. Merging has the following characteristics:

- A user can specify which record and fields should survive the merging process
- Any dependent records are automatically linked to the surviving record in chronological order
- A user may not have the ability to merge records, since this is often configured by a system administrator
- Can vary from service to service and from user to user

Follow these steps to merge records:

1. Create a **view** that contains all of the records that a user wants to merge.
2. Select the **records** to merge by clicking the checkboxes to the left of the desired records.

<input type="checkbox"/>	308	43	Christina	317-7111	Aaronson	ABB Ltd.
<input type="checkbox"/>	335	1	David	69-36-80-80	Aaronson	Accor
<input checked="" type="checkbox"/>	2508		Edward		Aaronson	Lander Corp
<input checked="" type="checkbox"/>	2053	650	Edward	750-9187	Aaronson	Danube Partners

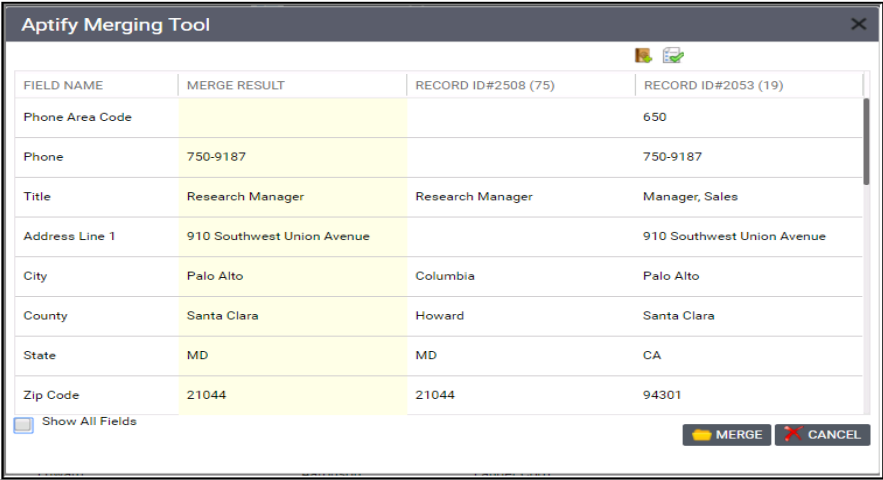
3. Click on the Views **More** dropdown and select **Merge Records**.
4. By default, the Merge Tool only shows the fields that have different values across the records selected. To show all of the fields in the record, click the **Show All Fields** button.

Aptify Merging Tool			
FIELD NAME	MERGE RESULT	RECORD ID#2508 (75)	RECORD ID#2053 (19)
Phone Area Code			650
Phone			750-9187
Title	Research Manager	Research Manager	Manager, Sales
Address Line 1			910 Southwest Union Avenue
City	Palo Alto	Columbia	Palo Alto
County	Santa Clara	Howard	Santa Clara
State	MD	MD	CA
Zip Code	21044	21044	94301

Show All Fields

MERGE CANCEL

5. **Drag and drop** the desired fields from the existing record columns to the **Merge Results** column.



The screenshot shows the 'Aptify Merging Tool' window. It contains a table with the following data:

FIELD NAME	MERGE RESULT	RECORD ID#2508 (75)	RECORD ID#2053 (19)
Phone Area Code			650
Phone	750-9187		750-9187
Title	Research Manager	Research Manager	Manager, Sales
Address Line 1	910 Southwest Union Avenue		910 Southwest Union Avenue
City	Palo Alto	Columbia	Palo Alto
County	Santa Clara	Howard	Santa Clara
State	MD	MD	CA
Zip Code	21044	21044	94301

At the bottom left of the table, there is a checkbox labeled 'Show All Fields'. At the bottom right, there are two buttons: 'MERGE' (with a yellow arrow icon) and 'CANCEL' (with a red X icon).

6. Click on the **Merge** button.
7. Click **OK** on the success message.

Summary

- Record information is organized into sections and fields.
- Persons and Companies are the two most frequently used record types.
- The Quick Search can find any record, view, or wizard.
- Record History shows all changes that have been made to a record.
- Favorites allow users to quickly open a record.
- Records can be created by creating a new one from a service, linked field, dashboard button, by cloning, or by using a wizard.
- Users can avoid duplication by utilizing the Conflict Message, Duplication pop-up, and the Merging tool

Chapter 4

Working with Views

Objective.....	4.1
Understanding Views.....	4.2
Creating List Views	4.5
Using View Filters.....	4.7
Display Fields.....	4.10
Sorting Data in Views.....	4.13
Advanced View Filters	4.14
Additional Filter Options.....	4.17
Using the Between Operator.....	4.19
Creating a Multi-Prompt View	4.25
Scheduling Views	4.27
Base Views	4.33
Creating a Chart View	4.35
Creating a Card View	4.38
Creating a Calendar View.....	4.39
Pivot Grids.....	4.41
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Grouping Data in Views (Desktop).....	4.45
Managing and Sharing Views.....	4.48

Objective

In this chapter, users will learn how to:

- Create and Edit Views
- Sort and Arrange Data in Views
- Understand different types of Views

- Use Views to Compose Bulk Messages
- Manage Views

Understanding Views

Views are the single most important function for finding, analyzing, and communicating data in Aptify. They enable users to locate and display desired groupings of data by creating filtered lists of records. Views are similar to reports in that they display a subset of data, but unique because they are interactive and dynamic. Intertactiv in enabling users to open records and edit/update the data. Dynamic because each time they are run they display the most updated data.

A view can be created and saved in every service and they represent subsets of the records contained in a service. When records in an existing View are updated, the view information reflects the changes.

A user defines filters which narrow the data shown in the view. Once created, views are saved within each user's profile and can be run again by selecting the view. Any view that is valuable to a user should be included as a Favorite and possibly as a part of a Dashboard. One of the fastest ways to access a view is by typing its name into the Quick Search bar and then selecting the result.

Views should be managed through **Shared Folders** that are owned and maintained by a Department/Function Administrator. Users within the department should connect to the Administrator's Shared Folder to access those views. By having a single user own and maintain the views, each user does not have to keep personal copies of the views they use. Following this best practice reduces duplicate views in the database and makes it easier to locate and update each view.. Members of the department should meet periodically to update the folder via the Administrator. Users should NOT be discouraged from creating their own views but should use the folder structure to contain/share the most frequently used views of thier department/function.

See Appendix G - User Profiles for more details on Profiles and Shared Folders.

IMPORTANT NOTE: A user may edit - through Properties - ANY View owned by that user. A user may NOT edit any view they have connected to through a Shared Folder.

To create a basic view:

1. Navigate to the service that contains the records you wish to view.
2. Provide a unique **Name** and **Description** for the View.
3. Specify **Filters** to narrow which records are included in the results.
4. Identify which reocrd **Fields** to display, and in which order.

Other options available will be explained in this chapter.

Major View Types:

List Views

- A list of records, formatted using columns and rows to display results
- Users can message, create reports, and bulk update the view results
- Most commonly used type in Aptify

Base Views

- The most flexible and widely used type of View — enables users to combine record data from several different services into one location
- Initially created by Administrators to become available List views for end users

Chart Views

- Group data based on specified criteria and displays as a chart or graph
- Excellent for inclusion in dashboards, especially at the executive level

Calendar Views

- Organize records using time data, and displays them on a calendar
- Helpful for date-based functions —Meetings, Committees, Education, etc.

Additional View Types:

Card View

- Displays record details in a summarized business card-like format
- Users can interact with linked details from results

Pivot Grid

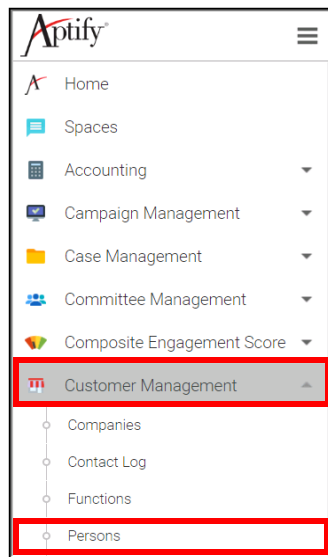
- Option that provides interactive reports to summarize large amounts of data
- Table information expanded/collapsed depending on level of detail desired.

Creating List Views

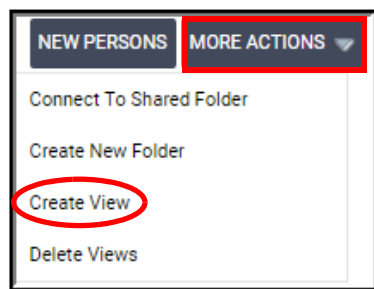
Aptify lets users locate specific information within their database by employing filters to show only records based on specified criteria.

Follow the steps below to create a filtered view that displays only the following records:

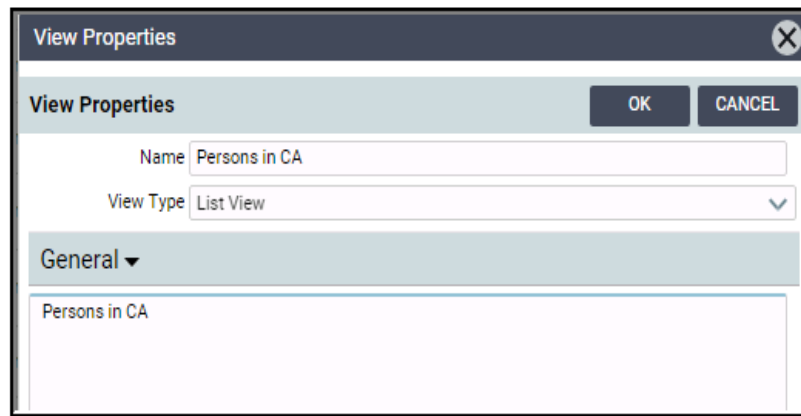
1. From the **Application** menu, click the **Customer Management** drop-down arrow.
2. Select the **Persons** service.



3. On the right side of the screen, click the **More Actions** button.
4. From the drop-down list, select **Create View**.
 - The default record type displayed in the view is determined by the currently selected service, in this case, Persons.

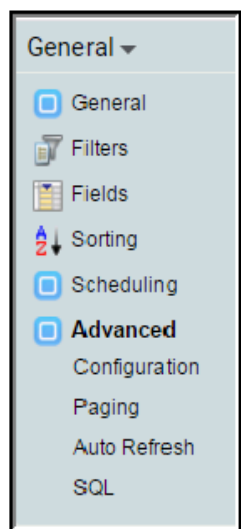


5. In the **Name** field, enter **Persons in CA**; click the **Tab** button.
6. Add additional information in the **Description** field.
 - Aptify recommends updating the description once the view has been completed. This helps ensure that the description is accurate.
7. For **View Type**, leave the default as List View.



The screenshot shows a 'View Properties' dialog box. At the top, there is a title bar with 'View Properties' and a close button. Below the title bar, there are 'OK' and 'CANCEL' buttons. The main area contains a 'Name' field with the text 'Persons in CA' and a 'View Type' dropdown menu set to 'List View'. Below this is a 'General' tab, which is expanded to show a text area containing the text 'Persons in CA'.

8. Aptify provides default data fields to display in a view, which can be customized.
9. To specify which data fields to filter, display and sort, click the **General** heading to display a drop-down menu.

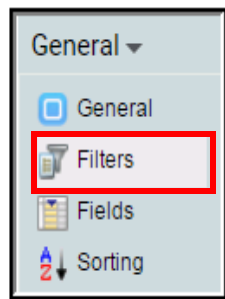


Using View Filters

Filters are the most commonly configured part of a view. Filters are constructed by creating a logical rule that uses the following elements to select only specific records:

- a) **Field**
- b) **Operator**
- c) **Value**

10. From the **General** drop-down menu, select **Filters**.

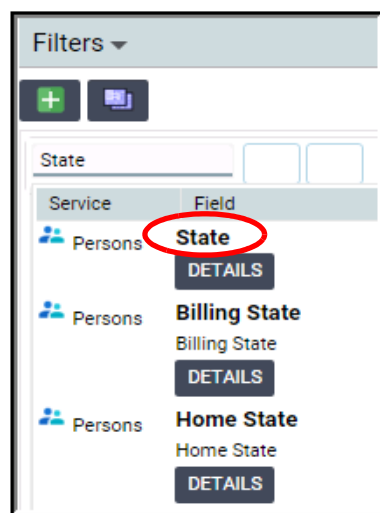


11. Click the green **Add (+)** button to add a filter.

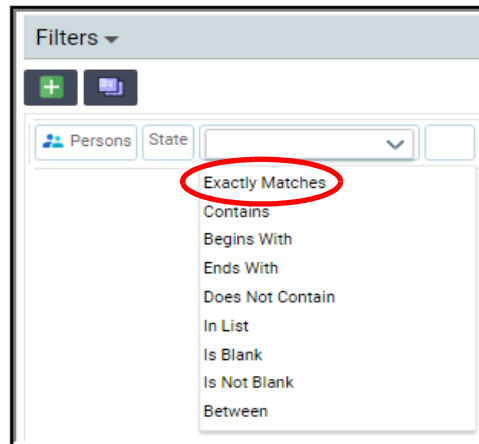
- A list of the selected service's fields display
- The Persons service is the default — Base Views can show multiple services

12. Select **State** from the list by using one of the following methods:

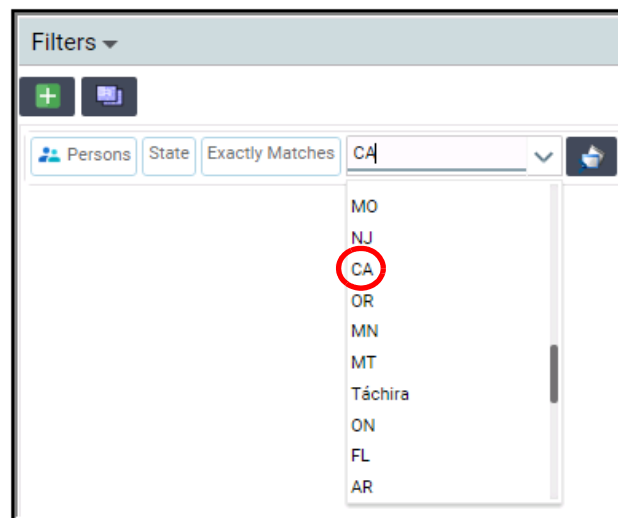
- Scroll to **State** and click to select
- Begin typing the word "State." Aptify narrows the list of possible matches as the letters are entered. Once state appears, click it to select it.



13. Once **State** is selected, the user is taken to the **Operator** column.
14. Select **Exactly Matches** from the **Operator** drop-down list.




15. The next column displays. Users can then:
 - Type **CA** (in capital letters) to automatically scroll to the matching drop-down value. Users must then select the value from the list.
 - Scroll through list to find **CA** and click it to select it.



16. At the top-right of the Create View window, click **OK** to run the view.

NOTE: Even though the Field designation above reads “State”, it actually using the person’s **Work State**, which is the Person’s service default address. A Persons’ home state would be designated by the filter field, “**Home State**”.

Persons in CA						
 More ▾						
<input type="checkbox"/>	ID	FIRST NAME	LAST NAME	COMPANY	TITLE	MEMBER TYPE
<input type="checkbox"/>	1	Aiesha	Baldwin	Danube Partners	Marketing Senior Director	Member
<input type="checkbox"/>	3	Athena	Scott	Akebono Cryogenics Incorporated	Marketing VP	Non-Member
<input type="checkbox"/>	5	Dacey	Yukon	Polyhedron Power Devices	Research Associate	Non-Member
<input type="checkbox"/>	6	Emily	Robinson	VC Osaka Technologies Group, Inc.	Research Associate VP	Non-Member
<input type="checkbox"/>	8	Habika	Harris	X.E. Awaken Components Limited	Research Executive VP	Corporate Member
<input type="checkbox"/>	17	Rabea	Hill	PJNE Electronics Co., Ltd.	Sales Manager	Individual Member
<input type="checkbox"/>	19	Sarah	Burgess	Tester	Sales Senior VP	Non-Member
<input type="checkbox"/>	20	Tadako	Cross	EK Techno Business Inc.	Sales VP	Individual Member
<input type="checkbox"/>	21	Tracey	Lewis	Toadstool Interface Technology Inc 123	Senior Director, Advertising	Student Member
<input type="checkbox"/>	22	Valerie	Rodriguez	Ponderosa Physics	Senior Director, Consulting Services	Individual Member
<input type="checkbox"/>	23	Xia	Robinson	Joist Packaging Technologies Corp.	Senior Director, Customer Support	Non-Member
<input type="checkbox"/>	25	Abraham	Rodriguez	MJG Technology Incorporated	Senior Director, Finance	Student Member
<input type="checkbox"/>	32	Francois	Hale	N Porterhouse Filtration Management AB	Senior VP, Customer Support	Non-Member

17. Observe the View Name.

18. Add **Persons in CA** to **Favorites** menu

- Click the **More** button; **Add View to Favorites**)

From the view results display, users can:

- Sort the results by clicking on a column (field) header
- Observe the number of records returned in the lower-right corner
- Page through the results in the lower-left corner
- Double-click on an individual record to open
- Utilize the More button's functions in top-left

Display Fields

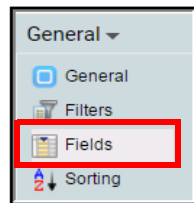
By default, a view displays the fields that are selected under the Fields section in the view's properties. The fields included by default are determined by the system administrator.

The fields section (are we calling them sections or tabs) also controls the order of the fields that are displayed. Remember that shared views can only be edited by the view's owner.

1. From the currently open view's button bar, click the **Properties** button.



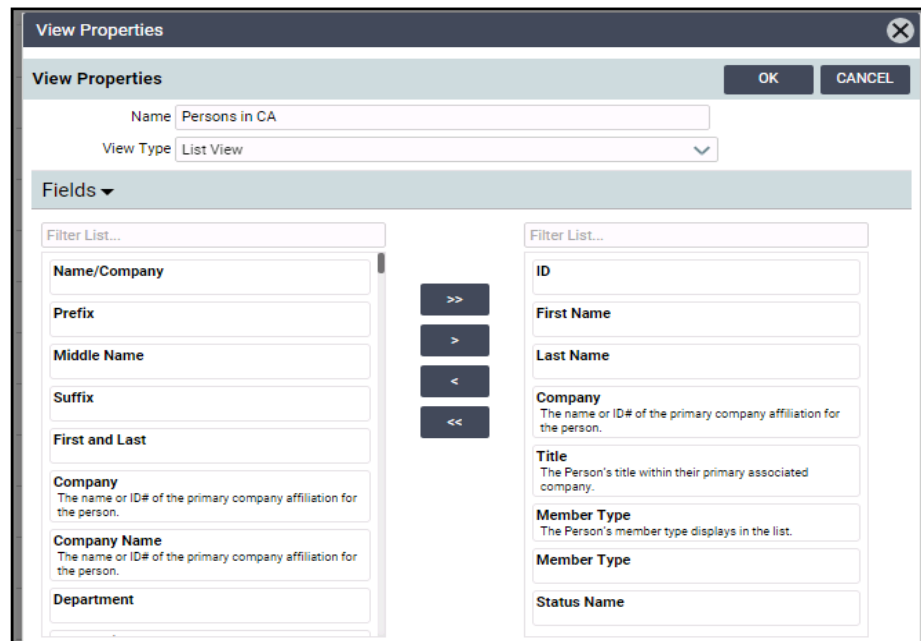
2. From the View Properties Screen, click the **General** button, then select **Fields**.



Fields Display

The **RIGHT** column lists the currently selected (displayed) fields.

The **LEFT** column lists fields that are available, but not shown in the view summary..



Displaying and Hiding Fields

Users can show or hide a field via the following methods:

FIRST: Select the field:

- Scroll down the list and click the field to select
- Alternatively, type the name into the textbox and once the field appears, click it to select it.

SECOND: Move the field from one column to another:

- Select the desired field, then click the left or right arrow button
- Alternatively, click and drag the field from one column to the other (Users can also click and drag fields to reorder them.)

Note that the double-arrows move all the fields from one column to the other. This is useful for services with fewer fields.

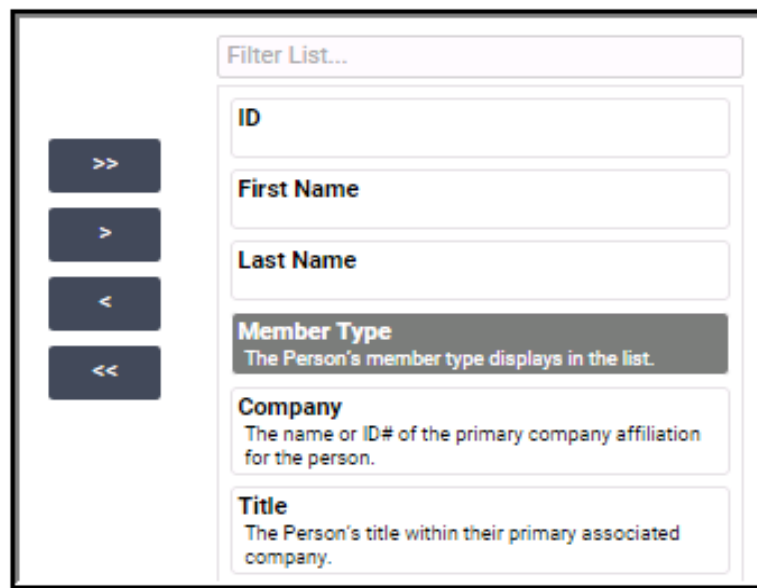
1. On the right side (Displayed Fields), click the second **Member Type** (Company Member). Click the **single** left-facing arrow to remove to the Hidden fields column.
2. On the left side (Available Fields), click the **State** field. Drag and drop the field to the Displayed Fields column.
3. Add **City** to the Displayed Fields (using either method).

The screenshot shows the 'View Properties' dialog box for a view named 'Persons in CA'. The 'View Type' is set to 'List View'. The 'Fields' section is divided into two columns: 'Available Fields' on the left and 'Displayed Fields' on the right. In the 'Available Fields' column, fields include Name/Company, Prefix, Middle Name, Suffix, First and Last, Company, Company Name, Department, and Pref. Mail Addr. In the 'Displayed Fields' column, fields include ID, First Name, Last Name, Company, Title, Member Type, Status Name, State, and City. Navigation buttons (double arrows, single arrows) are positioned between the columns. The dialog has 'OK' and 'CANCEL' buttons at the top right.

Reordering Fields

Users can change a field's display location in the view (the order it appears in from left-to-right) from the Fields section in the view properties. Use the following steps to re-order the fields in the Persons in CA view.

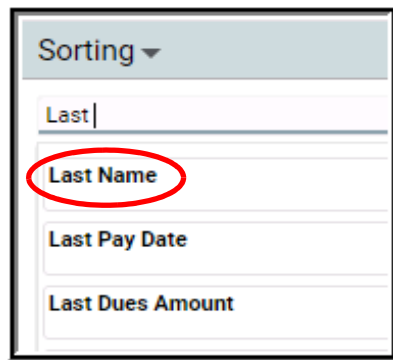
1. From the view properties' Fields section, click and drag the Member Type field so that it is above Company. Repeat the process for the Status Name field. This causes the fields to appear in the view between Last Name and Company.
2. Click **OK** to see the view field changes.



Sorting Data in Views

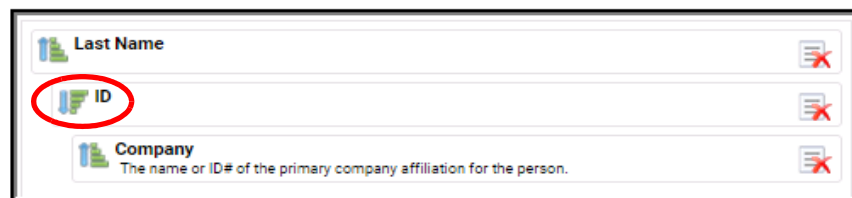
The **Sorting** function enables users to control the order records appear in a view.

1. From the current view (Persons in CA), click the **Properties** button.
2. Select the **General** heading. From the drop-down list, select **Sorting**.
3. In the text box below the **Sorting** arrow, type **Last**.
4. Click to select **Last Name** field to select it.



5. Repeat the process to sort by both **ID** and **Company**.
 - The icon to the left of the field indicates whether the sort is in ascending or descending order.
 - Default sort is ascending order; a user can click the icon to change to descending.
6. Change the fields added to sort in the following order:
 - **Last Name** — ascending
 - **ID** — descending
 - **Company** — ascending

Note: The **X** at the right end of the field to remove sorting for that field.



7. Click **OK** to save the changes and return to the view results.
8. Scroll through records displayed to confirm they are sorted.

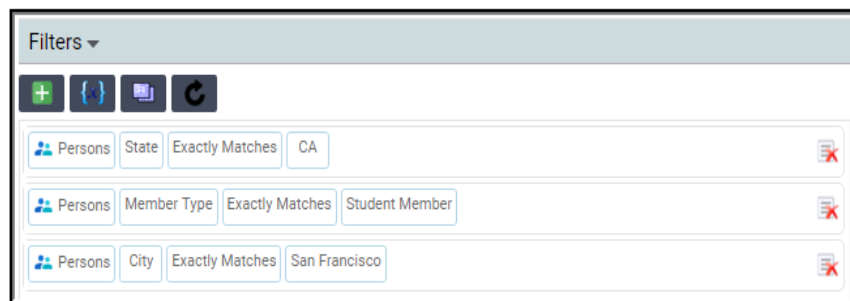
Note: clicking a column heading within a view only temporarily re-sorts the view. If a user closes the view and returns to it later, the view will again be sorted using the settings specified in the Sorting section.

Advanced View Filters

Views can be created using multiple filters and various search operators such as Exactly Matches, Contains, Begins with, etc. The filtered values can be set, users can be prompted for input. The following exercises will provide practice using these options.

Create a View with Multiple Filters

1. Open the **Persons in CA** view.
2. Open the view properties and change the view's name and description to read "**San Francisco Student Members.**"
3. Click the **General** heading and navigate to the **Filters** section.
4. Click the green **Add (+)** button to add another filter row.
5. Type **Member Type** in the field text box.
 - Select the **Second** displayed Member Type - the textual value.
6. From the **Operator** drop-down list, select **Exactly Matches**.
7. From the **Value** column select **Student Member**.
8. Click the green **Add (+)** button to add another filter row.
9. Type **City** in the field text box, then click the result to select it.
10. From the **Operator** column, select **Exactly Matches**.
11. In the **Value** field, type **San Francisco**.
12. Click **San Francisco** to select it.



13. Click **OK** to return to the view display; note that a new set of results display.

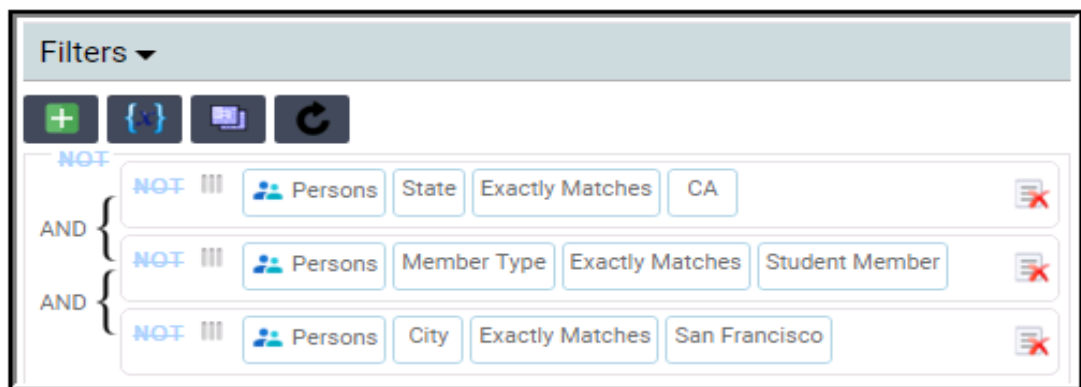
Editing Filter Logic (Using And/Or Operators)

By default, all filters are connected via "AND" logical statements. In other words, a record must meet all of the filter criteria to be included in a view. In the San Francisco student members view, for example, the person's work state must exactly match CA AND their city must match San Francisco AND their member type must be Student Member. If a record does not meet all three of those requirements, it is not included in the view.

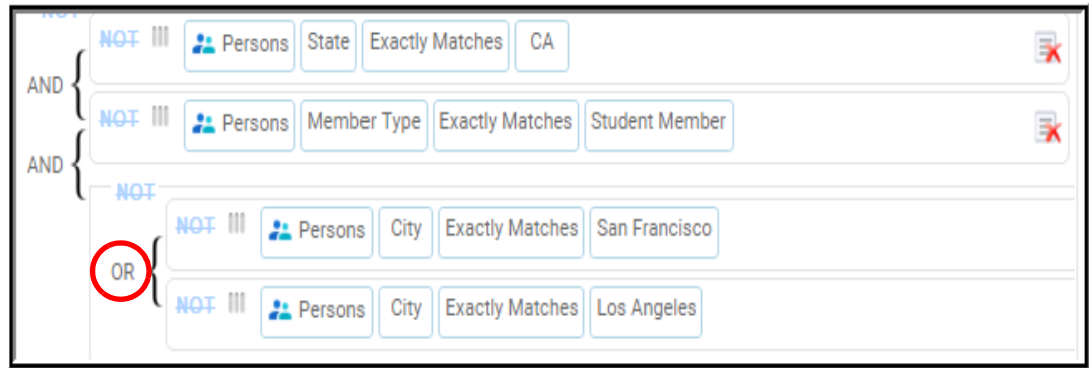
It is important to understand that filter statements are not "building" upon each other. That is, the view is not including people in California AND a separate set of people who are in San Francisco and a third set of people who are Student Members. Rather, each person must be in California and in San Francisco, and a student member.

Users can create views that also use an **OR** operator. The following will change a view to display records where the State is CA and the city is San Francisco or Los Angeles.

1. Open the **San Francisco Student Members** view, click **Properties**.
2. Navigate to the **Filters** section.
3. Click the **Filter Logic Button**, {x}.



4. Add another filter for **City Exactly Matches Los Angeles**.
5. Move the **City Exactly Matches Los Angeles** filter line **UNDER** the **City Exactly Matches San Francisco** line.
6. Click the third **AND** operator, then select **OR** from the menu that displays.



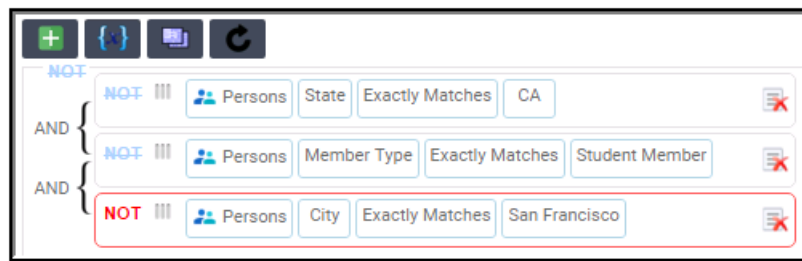
7. Click **OK** to return to the view results.
8. Return to the view's **Properties, Filters**.
9. Delete the Fourth Filter Line - **City Exactly Matches Los Angeles**.

Additional Filter Options

Not Function

Data can be filtered based on excluding a particular value for a field.

1. Open the **San Francisco Student Members** view properties.
2. Navigate to the **Filters** section.
3. Click the word **NOT** at the left side of the last filter line.
 - The negated filter row becomes highlighted in red.
 - View will now display student members for all CA cities **except** San Francisco.



4. Click **OK** and observe the results
5. Return to the view properties' Filters section.
6. Click the word **NOT** again to deactivate it.

Is Blank function

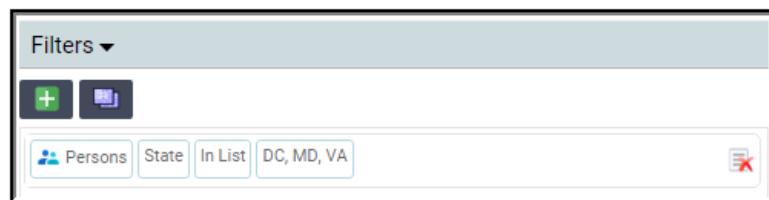
The **Is Blank** function can be used to pull records based on fields that do **not** contain a value.

1. Open the **San Francisco Student Members** properties.
2. Navigate to the **Filters** section.
3. Add another filter rule: Phone Is Blank
 - Use the **first** field value for **Phone** (The Description is "Phone ID")
 - Once **Is Blank** is chosen, users cannot fill out a Value
4. Navigate to the **Fields** section.
5. Add the **Phone** field (again, use the first selection).
6. Click **OK**.
 - The view now displays all San Fransisco student members who do not have a value entered for their phone number.
7. Users should observe a return of records that have a **Blank** value for phone.
8. Return to the view's properties and remove the **Phone Is Blank** filter line.

Using the In-List Operator

In this exercise, create a new view to show persons who live in any of three designated states.

1. Click the **Persons** tab to return to the persons service. (Use the Applications menu if the tab has been closed.)
2. Click **More Actions**, then select **Create View**.
3. In the **Name** field, enter **States: DC, MD, & VA**.
4. Navigate to the **Filters** section.
5. Click the green Add (+) button add another filter row.
6. From the filter **Field** name column select (or type), **State**.
7. From the **Operator** column, select **In List**.
8. Enter **Washington DC, Maryland and Virginia** to the Value field using one of the following methods:
 - Manually enter the list of states, using the two-letter abbreviation; separate each with a comma: **DC, MD, VA**
 - For fields that have pre-defined values, users can click the ellipses button to bring up a menu with a drop-down list of possible values.



9. Navigate to the **Fields** section and add the **State** field.
10. Click **OK** to display the view.
11. Click the **State** column header to sort the records alphabetically by state name.

Using the Between Operator

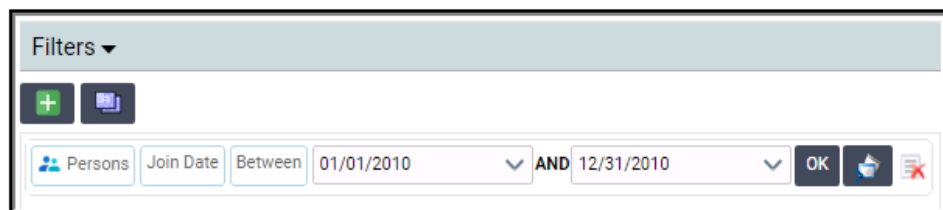
Users can use the **Between** operator to display results that exist between two dates or numbers. Between operators can also be used when creating “prompted” views - prompted views are explained in the upcoming pages.

The Between operator can be extremely helpful in creating views where user wish to search for records by a date range.

Between Operator Using a Static Value

A Between Operator that uses a static value is useful for scenarios where the user only wants to see records that fall within a particular date range and intends to re-use the same date range repeatedly. For example, a user may wish to see results for a specific week, month, quarter, or year.

1. From the **Persons** service, click **More Actions** and select **Create View**.
2. In the **Name** field, enter **Member Join Date 2010**.
3. Navigate to the **Fields** section.
4. Add the **Join Date** field to the **Selected Fields** column.
5. Navigate to the **Filters** section.
6. Click the **Add** button.
7. In the filters **Field** column, enter **Join Date** (first field available).
8. In the **Operator** column, scroll down to select **Between**.
9. In the first date field, enter **1/1/2010**.
10. In the second date field, enter **12/31/2010**.



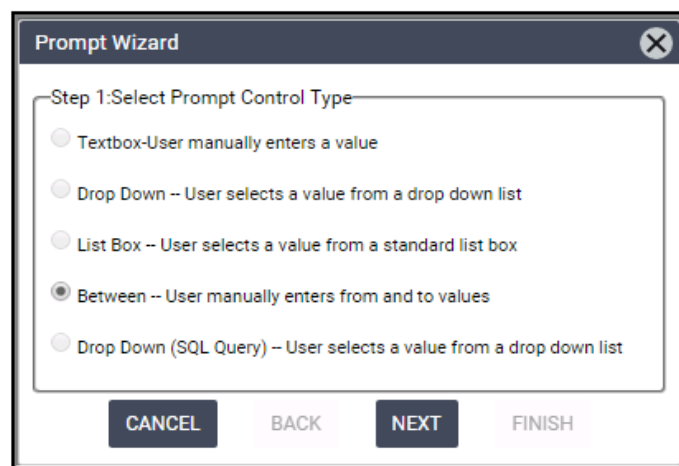
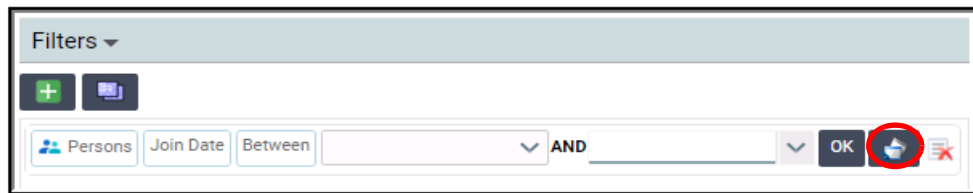
11. Click **OK** which confirms the values entered in the filter row.
12. Click **OK** to run the view.
13. Click on the **More** button - select **Auto-Resize Columns**.
14. Observe the results of the View showing members who joined during the date range.
 - The **Value** field now appears as two date fields separated by **AND**.

Between Operator using a Prompted Value

Between operators can be used in conjunction with prompted views to allow users to easily search for records using a date range. For example, users may wish to look up orders that were placed during a certain time frame, or identify registrations for a certain month.

Follow these steps to create a Prompted View:

1. From the **Persons** service, click **More Actions** and select **Create View**.
2. In the **Name** field, enter **Member Join Date Prompt**.
3. Navigate to the **Filters** section.
4. Click the **Add** button.
5. In the filters **Field** column, select **Join Date**.
6. In the **Operator** column, scroll down to select **Between**.
7. Leave the **Value** field blank, then click the **Prompt Wizard** button.
8. The **Between** Operator is already checked., click **Next**.



9. Enter date ranges for 2010 in the **From:** and **To:** fields.
 - Entering a default date range makes it easier to quickly modify the search range.

Prompt Wizard

Step 2: Default Value and Caption

The following values will be options for the user:

From: 01/01/2010 To: 12/31/2010

Enter a prompt caption (this will appear on the prompt dialog):

From: Join Date Between To: AND

CANCEL BACK NEXT FINISH

10. Click **Finish** to close the **Prompt Wizard**.
11. Click **OK** to run the prompt view.
12. Click **Go** to search for records using the default dates that have already been entered.
13. Change the dates in the prompt to the following:
14. Enter **01/01/2010** in the first **Join Date** field
15. Enter **03/31/2010** in the first **Join Date** field

Member Join Date Prompt

Join Date Between 1/1/2010 AND 12/31/2010 GO CANCEL

ID	FIRST NAME	LAST NAME	JOIN DATE
14	Paige	Byrd	03/12/2010 09:28:33 PM
20	Tadako	Cross	03/20/2010 09:28:09 PM
21	Tracey	Lewis	02/26/2010 09:28:33 PM

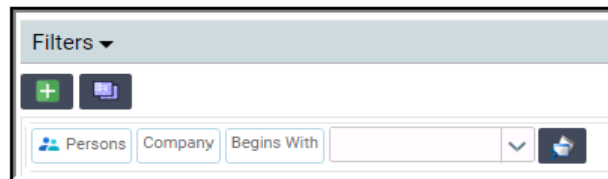
16. Click the **GO** button to execute the view, then observe the results.

Creating Prompted Views

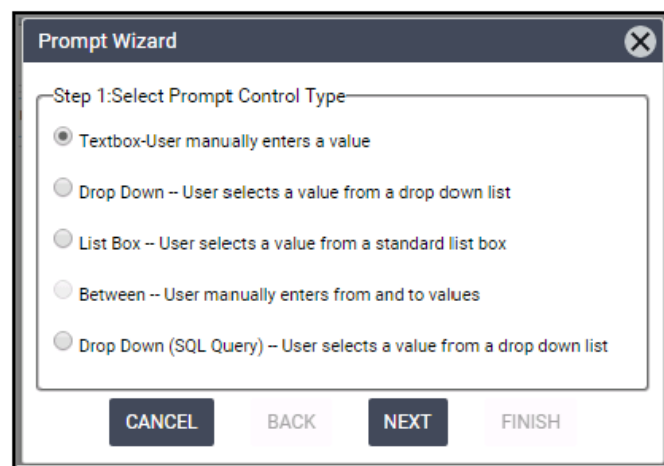
Interactive views can be created which prompt users to choose a filter value each time the view is selected. Users will construct a basic, single prompt view in the following exercise and progress to a more complex multi-prompted view in the next exercise

Creating A Prompted View: Text Box

1. From the **Persons** service, click **More Actions** and select **Create View**.
2. In the **Name** field, enter **Find Company Prompt**.
3. Navigate to the **Filters** section.
4. In the filters **Field** column, enter **Company**.
5. Select the fourth value — Virtual field tracks the name of the company...etc.
6. From the **Operator** column, select **Begins With**.
7. Leave the **Value** field blank. Click the **Prompt Wizard** button.



8. On the following screen, leave **Text Box** (the default) selected.



9. Click **Next**.

10. Leave the **Default Value** box blank.
 - The Prompt Caption is populated based on the filters specified.
 - User can enter a default value if desired.

11. Click **Finish**.
 - The wizard automatically completes the **Value** field.

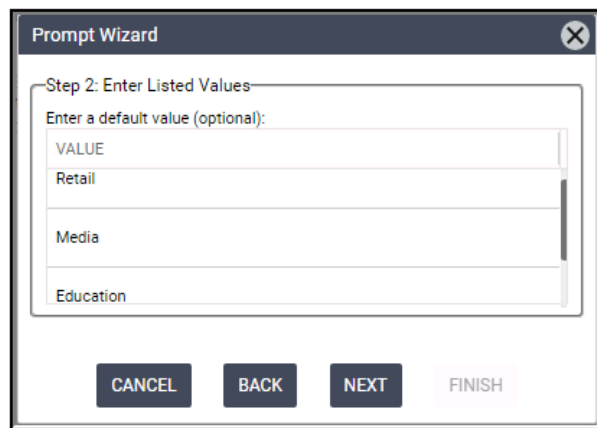
12. Click **OK** to return to complete the view.
 - Observe the prompt input fields display at the top-left of the view.
13. In the **Prompt** box, enter **Danube**, and then click **GO**.
 - Observe the displayed results.

ID	FIRST NAME	LAST NAME	COMPANY
1	Aiesha	Baldwin	Danube Partners
109	Jessica	Rodriquez	Danube Partners
342	John	Lee	Danube Partners

- For text-based prompts, use **Begins With** for the operator. This helps to improve search result times. Using a Contains search is not recommended as it must check more information in the database which can take more time to complete.
- Enter default values of "<field name>" for text-based fields and "0" for number-based fields to ignore the search parameter. This is useful when only searching for data using a particular field and not all the prompted fields.

Creating A Prompted View: Drop-Down List

1. From the **Companies** service, click **More Actions** and select **Create View**.
2. In the **Name** field, enter **Company by Type**.
3. Navigate to the **Filters** section.
4. Click green **Add** button to add a filter row. Note that the default service is Companies.
5. From the Filters **Field** column, select **Company Type**.
6. From the **Operator** column, select **Exactly Matches**.
7. Click the **Prompt Wizard** button.
8. Select the **Drop-Down** option and click **Next**.
 - If a **List Box** were chosen, the user would **ONLY** be able to choose from a list of values. In a Drop Down, the user can type another, non-listed value into prompt.
9. Click the blank area beneath the Value heading.
10. Enter the values for the drop-down list in the fields provided. Users will need to click in the next available spot once a value is entered to activate.
 - Enter **Retail**, **Media**, and **Education** (one per line).



The image shows a 'Prompt Wizard' dialog box with a title bar and a close button. The main content area is titled 'Step 2: Enter Listed Values'. It contains a text input field labeled 'Enter a default value (optional):' with the text 'Retail' entered. Below this are three more text input fields, each with a vertical scrollbar on the right. The first of these fields contains 'Media', and the second contains 'Education'. At the bottom of the dialog, there are four buttons: 'CANCEL', 'BACK', 'NEXT', and 'FINISH'.

11. Click **Next** to continue.
12. In the default value box, enter **Retail**.
13. Delete **Exactly Matches** from Prompt Caption, then click **Finish**.
14. Click **OK**
15. Click **GO**.
16. Observe the displayed records.

Creating a Multi-Prompt View

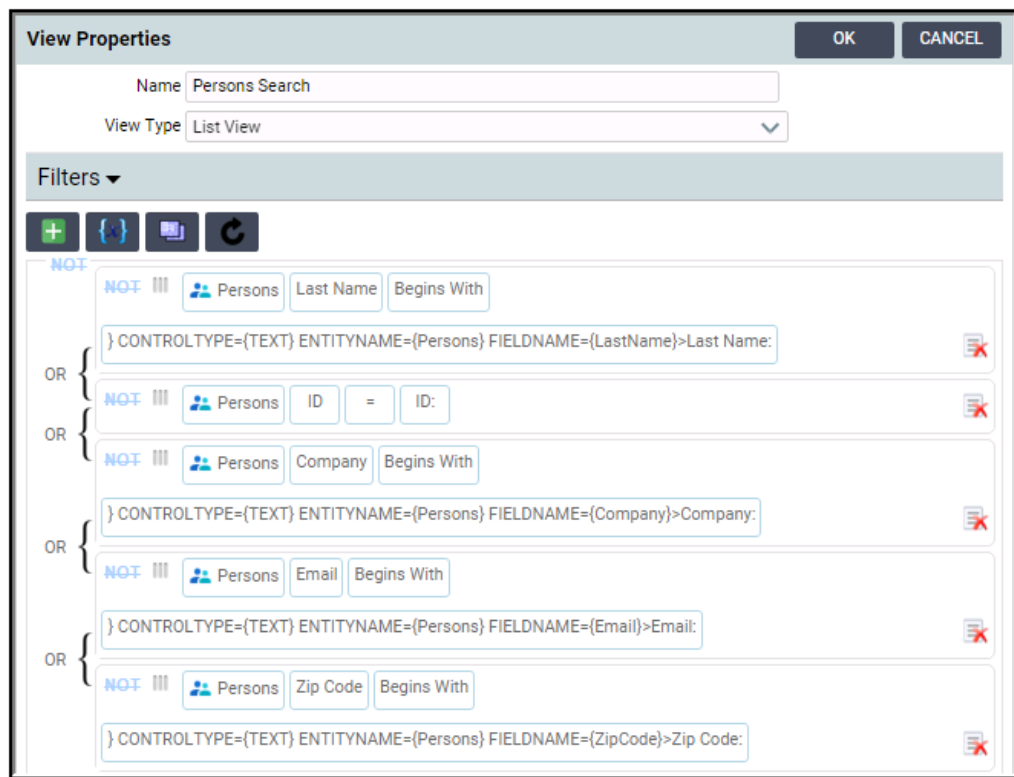
Multi-Prompted views are the most effective and commonly used views in Aptify. They enable users to search for data using multiple values. Users can then change the values enter and re-run the view to get an updated set of results.

Multi-Prompted views may be combined with static filters, drop-down lists, various operators, and advanced filter logic to create extremely powerful, flexible searches.

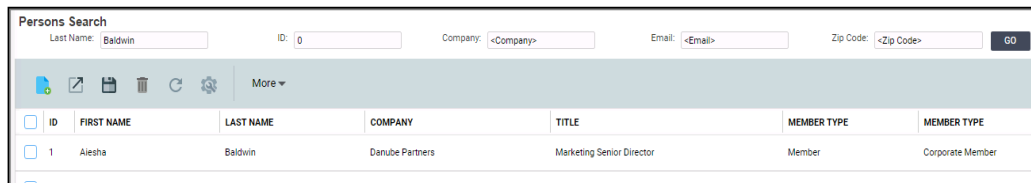
In this exercise, create a Find Persons prompted view that uses the ID, Last name, Company, Email, and Zip Code.

1. From the **Persons** service, click **More Actions** and select **Create View**.
2. In the **Name** field, enter **Persons Search**.
3. Navigate to the **Filters** section.
4. In the filters **Field** column, enter **Last Name**.
5. In the **Operator** column, enter **Begins With**.
 - Begins With is useful as a prompt operator because Aptify does not always have to check the entire value to determine if there is a match, as is the case with the Contains operator.
6. Leave the **Value** field blank, then click the **Prompt Wizard** button.
7. Keep **Textbox** selected and click **Next**.
8. In the **Enter a default value** field, enter **<LastName>**.
 - Using the angle brackets **<>** to encase a value causes the system to ignore the prompted field when doing the search. This prevents the search from accidentally including any record that contains any value at all, which occurs if the field prompted field is left blank.
 - For example, if prompting for the First Name and Last Name, and only a First Name is entered, the system will attempt to find all records that match the First Name and ignore the Last Name search.
 - If the angle brackets are not used, and only a First Name is entered, the system will attempt to find people with the First Name and **anyone with any value entered** for Last Name—which is not the intended search and would return almost every record in the system.
 - For a numeric field, use a default of 0 (zero).
9. In the **Enter a prompt caption** field, delete the words, **Begins With** and add a colon to the **Last Name**.
 - Keeping the operator in the Prompt Caption is unnecessary for most prompts since users should assume most prompts are Begins With searches..
10. Click **Finish**.

11. Repeat the steps above to add three more prompted filter lines for:
 - **ID** (numeric), **Company** (text), **Email** (text) and **Zip Code** (text)
12. Click the **Filter Logic** icon; change all the **ANDs** to **ORs**.
 - Changing the ANDs to ORs provides a more inclusive search; Aptify will return results for any record that matches any of the criteria entered. This is typically used when searching using one value at a time. For example, searching for Aiesha Baldwin will not return only persons named Aiesha Baldwin, but anyone with a first name of Aiesha and anyone with a last name of Baldwin.
 - Users can change AND and OR operators to create searches that look for specific information and employ Between operators to easily create date-based prompts..



13. Navigate to **Fields** section - add **Email** and **Zip Codes** to the **Selected Fields** column.
14. Click **OK** to execute the view, then test the prompts.



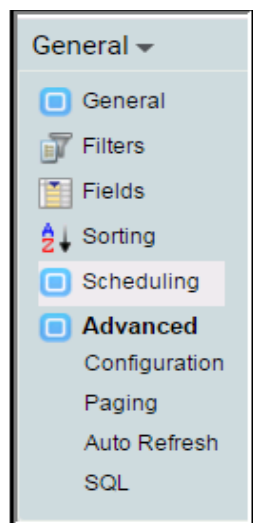
15. Test the prompts.
16. Add the view to your **Favorites**.

Scheduling Views

Users can set up a view to automatically output its contents on a recurring basis. These contents can be emailed to recipients as an attachment, saved as an Excel file or Crystal Reports file, or printed using a network printer. This feature is particularly useful for getting information from Aptify to individuals who may not have access to the system and its views.

For example, a sales associate could create a view that displays all the orders taken during the last week and have that view's contents be emailed to their manager every Friday at 5:00 PM.

1. Open **San Francisco Student Members** from **Quick Search**. Open View **Properties**.
2. Click on the **Scheduling** section.



3. Do not check the **chedule This View To Run Automatically** checkbox.
4. In the **Frequency Type** drop-down list, enter **Weekly**.
5. In the **Start Date** field, enter the date for **next Monday**.

 A screenshot of the 'Schedule' dialog box. The 'Delete the task if it is not scheduled to run again.' checkbox is unchecked. The 'Frequency Type' is set to 'Weekly'. The 'Start Date' is '01/18/2016' and the 'Start Time' is '9:00 AM'. The 'End Date' is empty. Under 'Schedule Task Weekly', 'Every 1 Week(s)' is selected, and 'Mon' is checked. Under 'Repeat Task', the 'Repeat Task' checkbox is unchecked, 'Every 1 Hours' is selected, and 'Until 9:00 AM' is selected.

6. Click the **Schedule** heading, then select **Output Options**.
7. In the **Output Mode** drop-down list, leave **Email** selected.
8. In the **Message System** field, enter **Outlook Mail**.
9. Click the **Output Type** drop-down list to see options, but leave **View** selected.
10. On the bottom-right of the window, observe the From **Email**, **Subject**, and **Body** options.
11. Click the **Output Options** heading, then select **Advanced Scheduling**.
12. The view scheduling process should be executed using a separate **Application Server** for technical and performance reasons. These field settings will contain default values as determined by your system administrator.

The screenshot shows the 'Scheduling' configuration window. At the top, there is a 'Scheduling' dropdown menu and a checkbox for 'Schedule This View to Run Automatically'. Below this is the 'Output Options' section, which includes a dropdown for 'Output Mode' (set to 'Email'), a text field for 'Message System' (containing 'Outlook Mail'), and another dropdown for 'Output Type' (set to 'View'). There are also text fields for 'Directory' and 'File Name', and a checked checkbox for 'Append Date and Time to File Name'. To the left, there is an 'Email Recipients' section with buttons for 'NEW', 'EDIT', 'DELETE', and 'IN PLACE EDIT', along with up and down arrow icons. Below these is a table with columns 'EMAIL' and 'TYPE', which is currently empty. To the right of the table are text fields for 'From Email', 'Subject', and 'Body'. At the bottom of the window, there is a pagination bar showing '0' items and 'No items to display'.

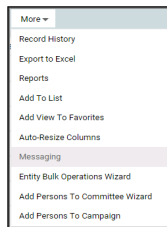
13. From the View Properties screen, click **Cancel**.
 - Scheduling NOT processed in training class.

Composing a Bulk Message

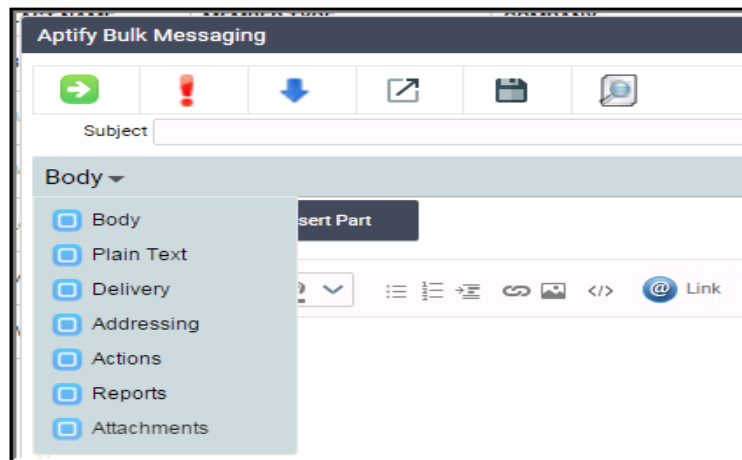
Aptify has the ability to generate unique, personalized email messages to persons in the database; this feature is known as Bulk Messaging. Bulk Messaging is extremely effective for sending renewal notices, registration information, past due balance information, and other common tasks. Note that it should not be used for large marketing communications; these are typically handled by third party platforms.

In this exercise, draft a sample bulk message that can be sent to the persons whose records appear in a filtered view.

1. Run the **San Francisco Student Members** view.
2. From the view **More** button drop-down list, click the **Messaging** option.

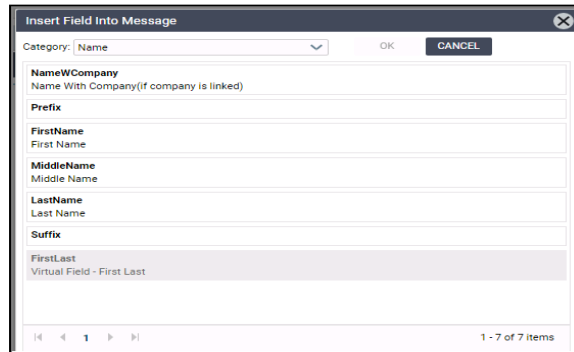


3. The **Aptify Bulk Messaging** window displays.
4. In the **Subject** field; enter **Order HistoryOrder**.
5. Click the **Body** heading.
 - Messages can be composed in either HTML or Plain Text format.



6. Click the **Insert Field** button.

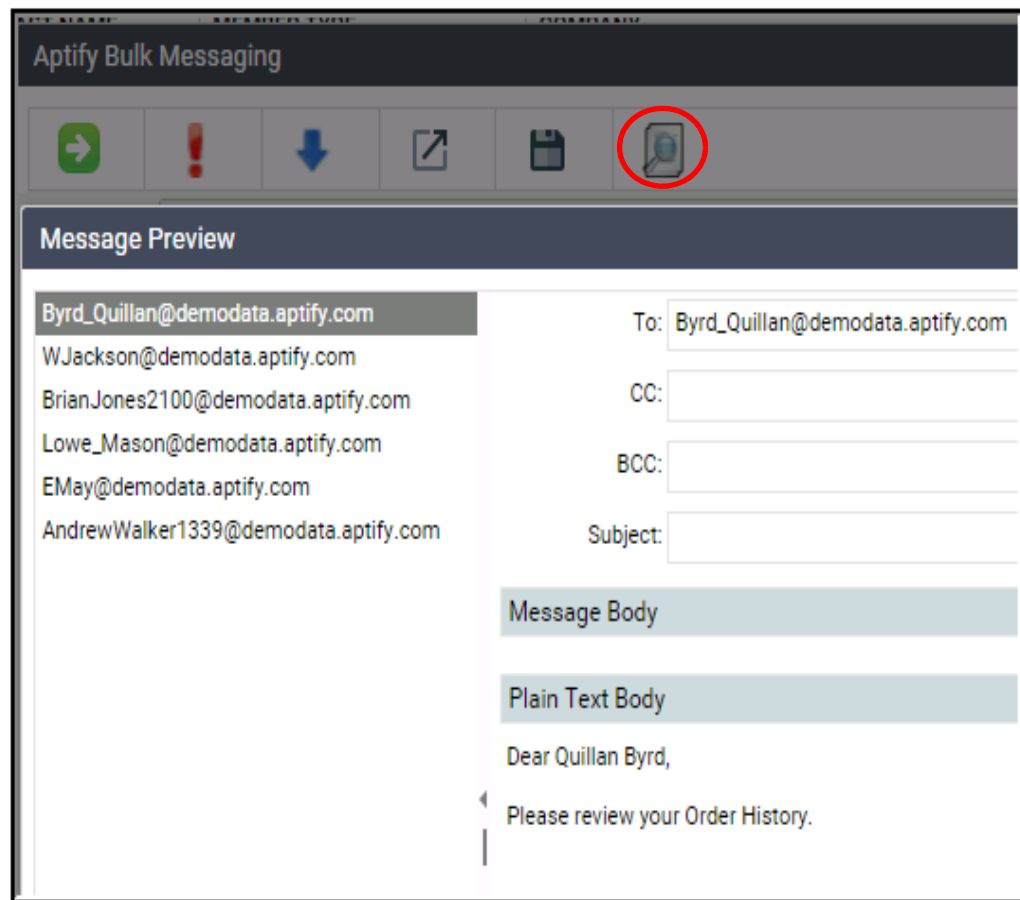
7. In the **Category** field, click the drop-down arrow; select **Name**.
8. Select **FirstLast**.
9. Type **Dear** in front of **FirstLast**.



10. Your message field should now read: “Dear <<FirstLast>>”. Enter a colon after “<<FirstLast>>” ; click the **Enter** key twice to move your cursor to the line below.
11. Type, **Please review your Order History**.
12. Click the **Insert Part** button.
13. Click to select **Order History Part**.
14. Click **OK**.
15. Select **Addressing**.
 - The **To** fields are automatically completed using each person’s email address.
16. Observe the **From Name** and **From Email** and **Reply To** fields - this is where the user could enter their or their department’s name and email.

17. Click the Addressing heading, then select Delivery. Observe the drop-down options.

18. Click the **Preview** button, to review your message.



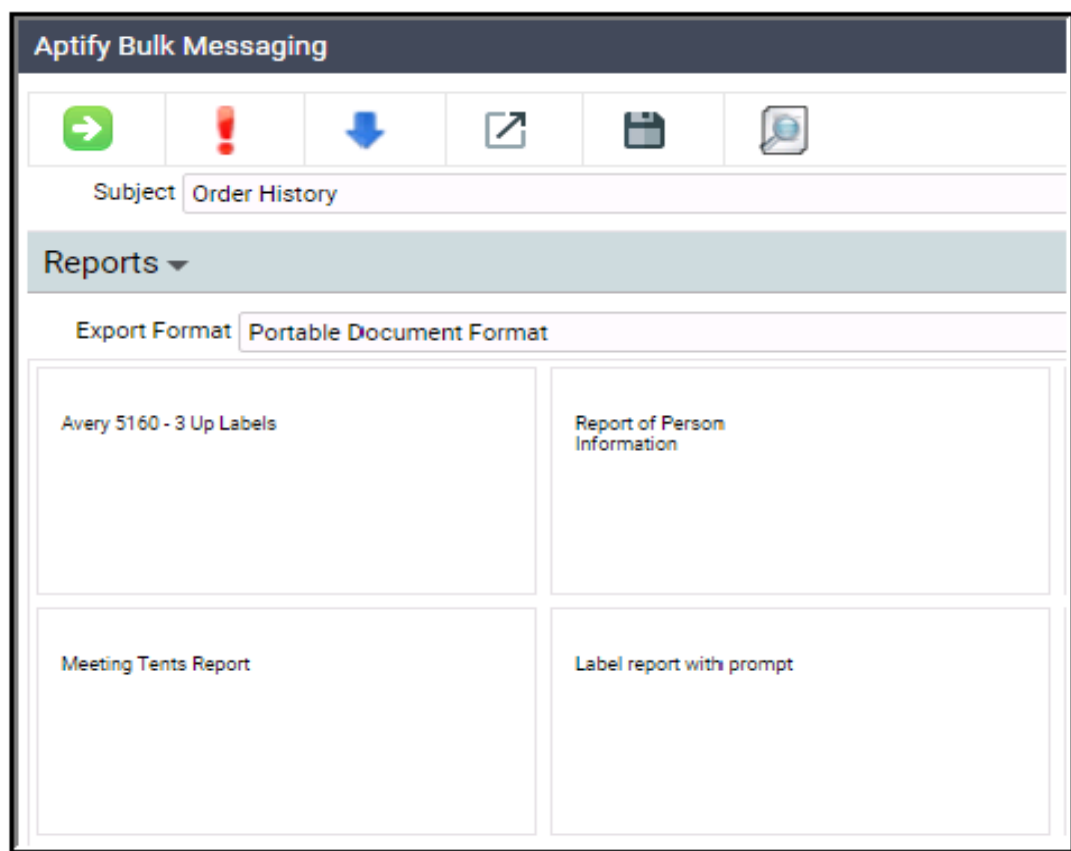
19. On the left, click email addresses to view the uniquely generated message to that person.
20. Click the X in the upper-right corner of the Messaging Dialog box to close. **Do Not Send the Message** in training class.

Attaching Reports

Crystal Reports® can be attached to a Bulk Message. This enables users to create a view for a recipient that they wish to send a particular report to as an attachment such as, Invoice, Name Tent, Badge, Activity Consolidation, etc.

The Report is selected from the Attachments tab and the appropriate Report is sent to the individual user with only their relevant data.

1. Click the **Reports** tab of the **Bulk Message**.
2. Click the scroll bar to the right to review various report options available.



Note: Only certain reports will be available from views of particular services. For instance, Invoice Reports are only available when a View of Orders is created.

3. Click the **X** button in the upper right corner of the window to close the Aptify Messaging dialog without sending the message.

Do **NOT** click the Send Messages button.

Base Views

Base Views are pre-created SQL views that combine fields from multiple services into one selectable view setting. Base Views provide users unlimited cross-reference possibilities across the entire system.

When creating a new view and selecting an existing Base View, users have access to the data and fields from multiple services designated in that Base View.

In the example below, select from a persons service view, the **PersonsWithCommittees** Base View. Users will consequently see four services represented in the Fields tab and in the subsequent results when the view is run:

- Persons
- Committees
- Committee Terms
- Member Records

Once users develop a competency in views, they can request that Base Views be built by Administrators and populated as a Base View values for selection when creating a new view.

1. Create a new view -- **Persons** service; **Create View**.
2. In the **Name** field, enter **Committees & Persons (BASE VIEW)**.
3. Click the **General** tab; click the **Configuration** tab.
4. On the following screen, in the **Entity Base View** field, begin typing **persons**; from the drop-down, select **PersonsWithCommittees**.
 - Alternatively, click the **magnifying glass** icon at far right, from the **Advanced Search** screen, click **Find**, click to select the base view; then click **Select**.

The screenshot shows the 'View Properties' configuration window. The 'Name' field is 'Committees & Persons (BASE VIEW)' and the 'View Type' is 'List View'. The 'Advanced > Configuration' tab is active. The 'Entity Base View' dropdown is set to 'PersonsWithCommittees' and is highlighted with a red box. A warning message is displayed below it: 'Warning! Changing the Base View will clear any settings you have configured up to this point.' Below the warning are fields for 'Form Template', 'Record Template', 'Preview Template', and 'Folder', each with a search icon and a plus sign. At the bottom, there are checkboxes for 'Show Preview Pane' (unchecked) and 'Read Uncommitted' (checked).

5. Click the activated **Advanced > Configuration - Fields** tab.
6. Observe the multiple fields available.

7. There are four **Services** represented in the **Fields**:

- NameWCompany - Persons Service
- Term Title - Committee Terms Service
- TermRole - Term Member Service
- Committee Name - Committee Service

The screenshot shows a 'Fields' configuration window with two columns of fields. The left column contains a list of available fields, and the right column contains a list of selected fields. The selected fields are highlighted with red boxes.

Available Fields	Selected Fields
Prefix	ID
First Name	Name/Company
Middle Name	Address Line 1
Last Name	City
Suffix	State
First Last	Zip Code
Company ID <small>The name or ID# of the primary company affiliation for the person.</small>	Country
Company <small>The name or ID# of the primary company affiliation for the person.</small>	Phone Area Code
Department	Phone <small>Numbers for the person's telephone.</small>
Title <small>The Person's title within their primary associated company.</small>	Phone Extension
Address ID	Email <small>The label on the field depends on what is selected in the list.</small>
Address Line 2	Member Type <small>The Person's member type displays in the list.</small>
Address Line 3	Term Rank
Address Line 4	Term Title
County	Term Role
Phone ID	Region
Phone Country Code	Term Member Start Date
Nickname	Term Member End Date
Gender	Term
Mail Exclude	Committee Name

8. Select the **Filters** tab - the same Fields are represented under the **Filter Fields** column.

9. Add a Prompted filter for Term - Begins With - 2012 (Default Value).

10. Click **OK**

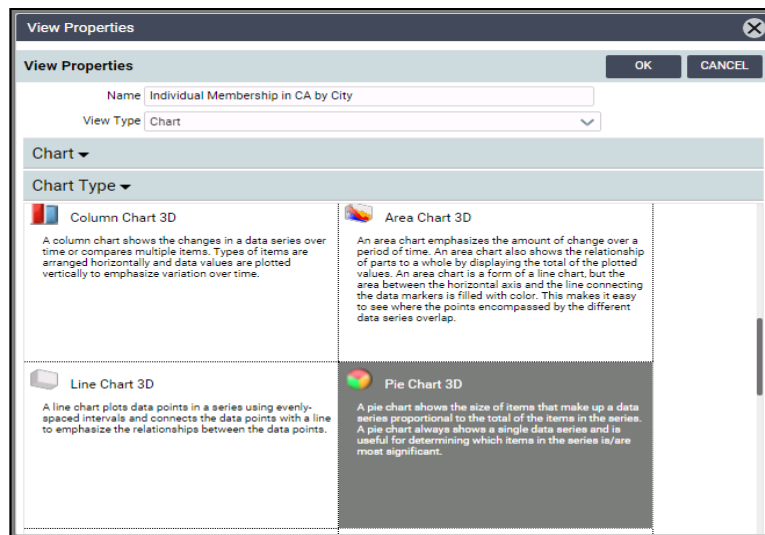
11. Run the view with default value.

12. Observe results - scroll to right to see Committee, Committee Term fields/columns.

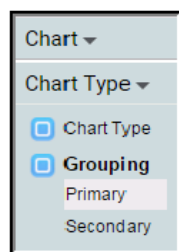
Creating a Chart View

Aptify can visually represent data in a chart format, making it easy for users to interpret the information. Follow the steps below to create a Chart View:

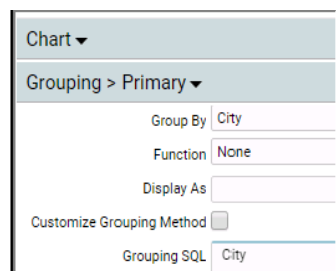
1. Create a new view -- **Persons; More Actions; Create View**.
2. **Name** the view, **Membership in CA by City**.
3. From the **View Type** drop-down list, select **Chart**.
4. Scroll, click to select the **Pie Chart 3D** type.



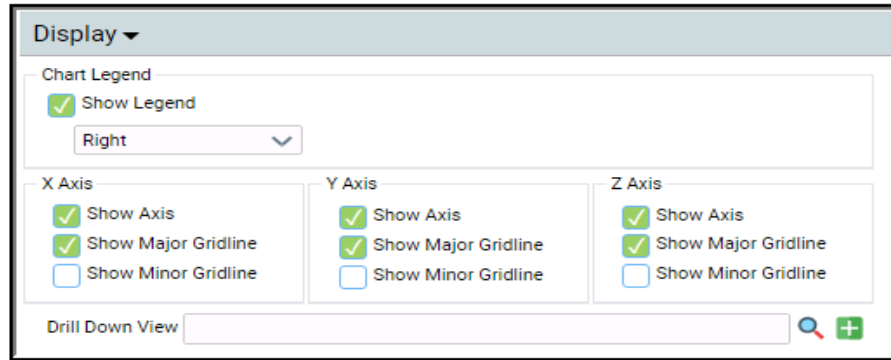
5. Click the **Chart Type** tab. Under the **Grouping** tab, click the **Primary** tab.



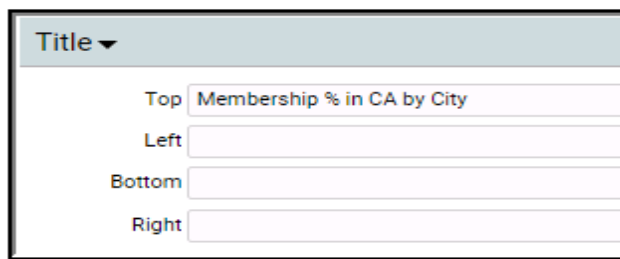
6. In the **Group By** field, start typing **City** - select.



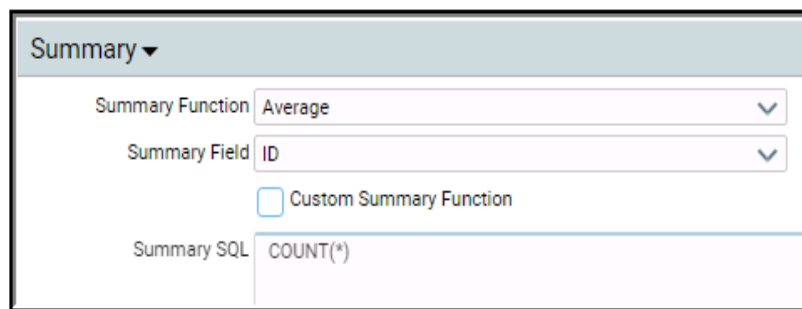
7. Click the **Grouping > Primary** tab; from the drop-down, select **Display**.
8. Verify that the checkbox, **Show Legend**, is selected.



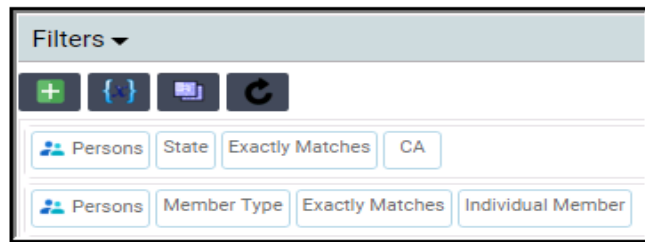
9. Click the **Display** tab; from the drop-down, select the **Title** tab.
10. In the **Top** field, enter **Membership % in CA by City** as the title of the Chart.



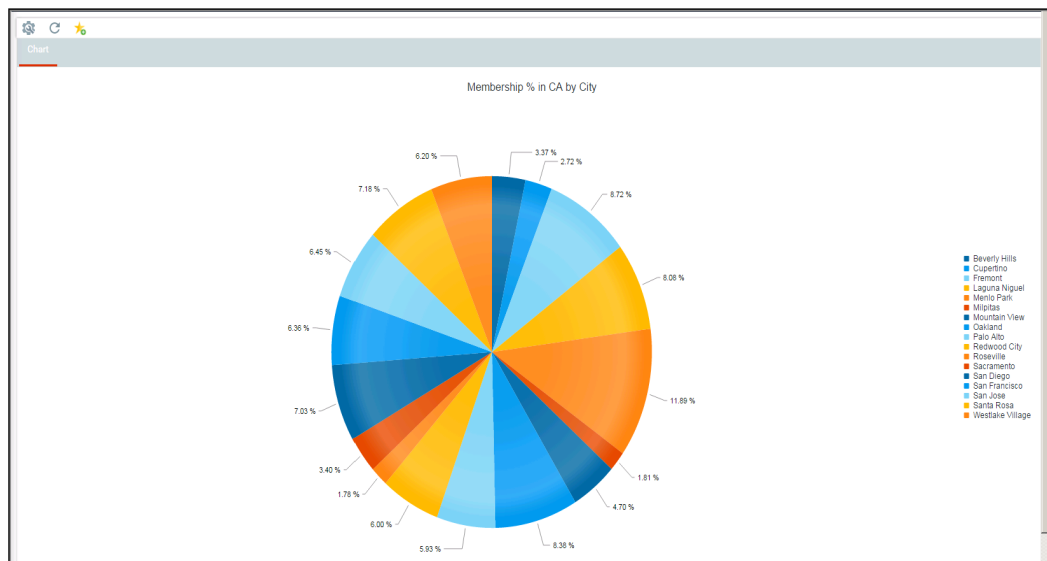
11. Click the **Title** tab; from the drop-down, select the **Summary** tab.
12. In the **Summary Function** field, click the drop-down, select **Count**.



13. Click the **Chart** tab to select the **Filters** tab.
14. Designate filters to match those in the following figure.



15. Click **OK** to see the displayed 3D Pie chart:



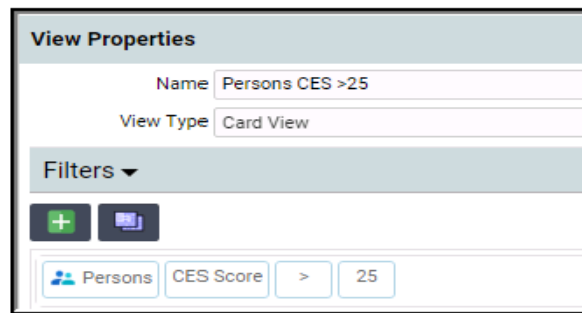
16. Click a section of the pie graph to see the individual records for that section.
17. Click the Chart tab, top left, to return to the chart view.
18. **Close** the view.

Creating a Card View

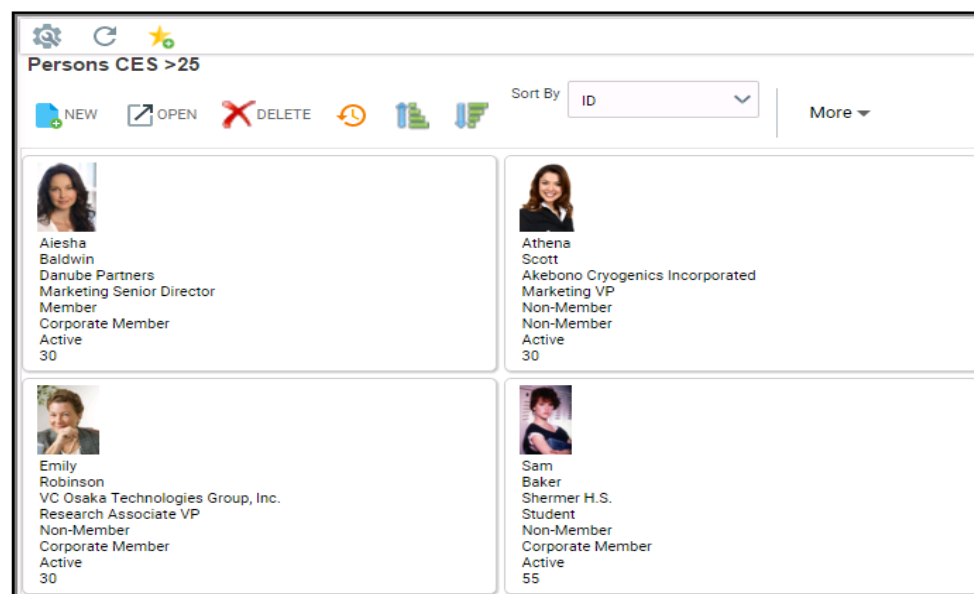
Card Views display record information summarized in an index card like format whose content is determined by selected fields. This enables a user to view a number of records with summarized and linked details in a panel format as compared to a list or chart.

In this exercise, users will create a card view based on persons' Composite Engagement Score (CES) in ascending order:

1. Create a new view in the **Persons** service. Name it, **Persons by CES card view**.
2. Change the **View Type** to **Card View**.
3. From the **Filters**, specify a Filter row of **CES > 25**.
4. From the **Fields**, add display fields **CES** and **Photo**.
5. Sort by **CES**, ascending.



6. Click OK.
7. Observe the results.



Creating a Calendar View

Calendar views display records representing events or transactions in a calendar according to the date and time at which they occur. Calendar views are very flexible; users can organize them by either day, week, month, or year. If a user sets the view in day or work week mode, they can select one of several time intervals ranging between one minute to one hour.

1. Create a new view using the **Contact Log** service; **More Actions; Create View**.
2. **Name** the view, **Incomplete Follow up Items**.
3. From the **View Type** drop-down, select **Calendar**.
4. From the **Mode** drop-down, select **Month**.
5. From the **First Visible Date** drop-down, select **Manual**.
6. From the **Date** drop-down, select **11/09/2014**.

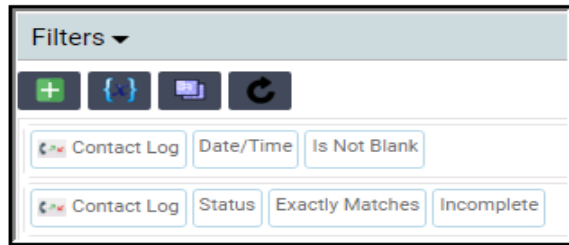
The screenshot shows the 'View Properties' dialog box. The 'Name' field is set to 'Incomplete Follow Up Items'. The 'View Type' is set to 'Calendar'. Below this, there are two tabs: 'Calendar' and 'General'. The 'General' tab is selected, showing the following settings: 'Mode' is set to 'Month', 'First Visible Date' is set to 'Manual', and 'Date' is set to '11/09/2014'.

7. Click the **General** tab; select the **Data** tab.
8. From the **Start Date Field** drop-down, select **Next Contact Date**.
9. From the **Duration Mode** drop-down, select **Standard**.
10. From the **Title Field** drop-down, select **ID**.

The screenshot shows the 'Data' tab in the 'View Properties' dialog box. The 'Start Date Field' is set to 'NextContactDate', 'Duration Mode' is set to 'Standard', 'Std. Duration' is set to '0.5', and 'Title Field' is set to 'ID'.

11. From the **Calendar** tab, from the drop-down
12. Click **Filters**.

13. Enter and select **Date/Time** in the field box.
14. For the **Operator**, select **Is Not Blank**.
15. **Add** a second Filter row,
16. **Status**, **Exactly Matches**, **Incomplete**.



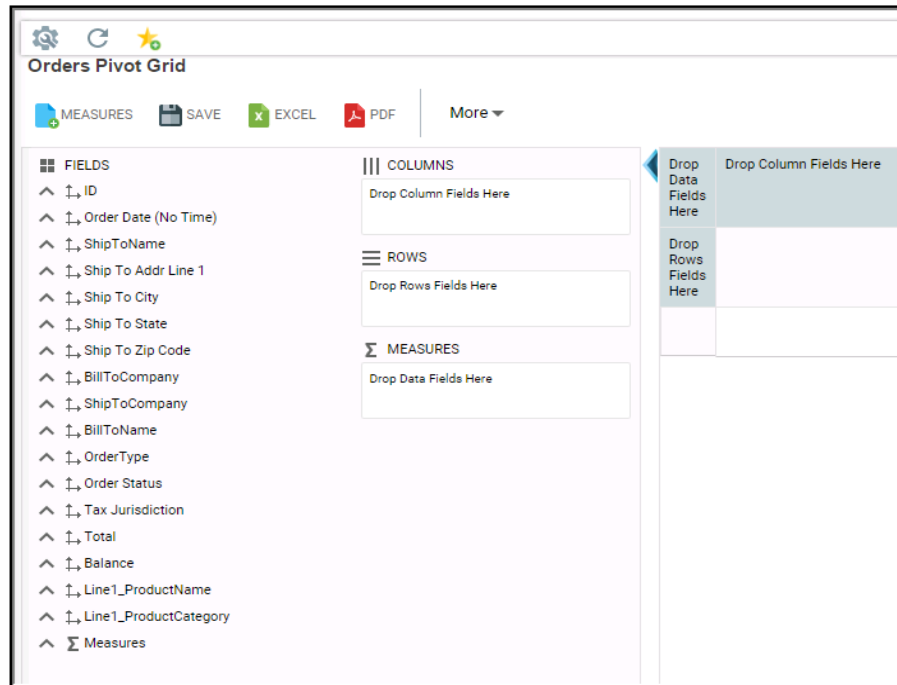
17. Click **OK** to display the View.

Sunday	Monday	Tuesday	Wednesday	Thursday
29	30 6820	01	02	0
06	07	08	09	1
13	14	15	16 6821	1
20	21	22 6822	23	2

Pivot Grids

Pivot Grids are interactive tables used to summarize numerical data. Users Rotate (or *pivot*) rows and columns to view different summaries of data. A Separate Pivot Grid tab appears in View and users use the Properties dialog to specify settings.

Users can also move rows and columns to change the organization of the data cells. This is known as “pivoting.”



The screen shot above illustrates how the organization of data changes when users move (or pivot) row headings.

In the top image, Order totals (in white) are organized based on the **BillToCompany** name (at the far left). By expanding a company heading (as in the case of Danube Partners), a user can further break down the Order totals based on specific products ordered by the company (Products are identified by their Product ID number in this example). Danube Partners ordered \$100 worth of products on 12/4/2003, of which \$25 was for Product 9.

The bottom image shows the same data except the BillToCompany heading has been moved to the right of the Order Line ProductID heading. Now instead of showing Order Totals based on Company, the table displays Order Totals based on the **Products Ordered**. Rearranging the two headings changed the format of the data and provides new insight into the data. With the new layout, a user can now determine that \$125 worth of Product 9 was sold on 12/4/2003, of which \$25 worth was purchased by Danube Partners.

NOTE: Most Pivot Grids can be replaced by Base Views. Base Views are much more effective than Pivot Grids as they use considerably less processing power, are more easily displayed in dashboards, and provide more data management options.

Topic Codes

Topic Codes provide a method to collect **information about the areas of interest of customers/members**. Topic codes can be used effectively for:

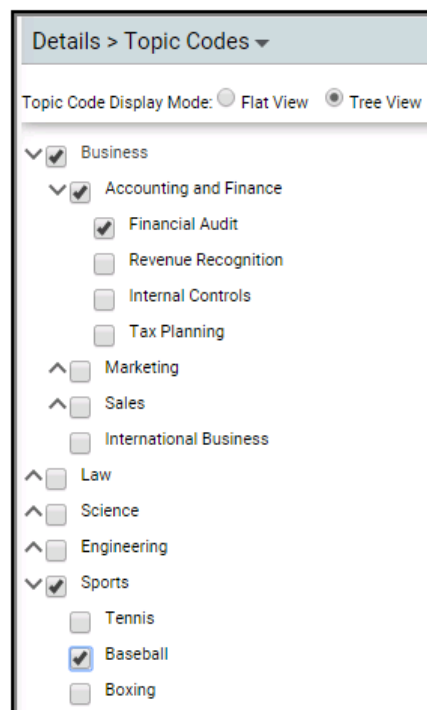
- Customer/member profiling
- Driving personalized Web site content
- Target marketing
- Determining viability of new product/service offerings

The default Aptify installation provides a **Topic Codes tab on the following forms: Organizations, Companies, Employees, Persons, and Products**. Multiple records, such as Persons and Products, linked to a particular Topic Code provides a powerful and flexible relationship useful when targeting marketing campaigns.

Although topic codes are most commonly associated with people, companies, products, or news articles, their flexibility allows them to link to any type of record in Aptify. Because topic codes can be associated with any service, records in new custom modules can also link to topic codes, providing virtually unlimited possibilities.

Only Administrators have the ability to add or edit Topic Code records. Once an Administrator has added/edited Topic Codes for a particular service, the available codes appear under the Topic Codes tab. Those topic codes can then be either checked by an End User who is in communication with a client, or by the client themselves via an on-line profile.

In the the Persons form displayed below, there are Top-Level Topic Code categories. Each of these categories can have multiple sub-topics opened by expanding the left-hand arrow.

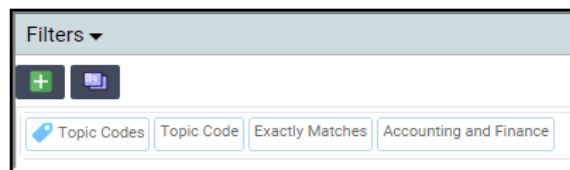


Creating Views of Topic Codes

To Create a view of all Persons, Companies, Products, or Orders that have a topic code selected, users must go to the desired service to create the view.

The example below explains how to create a view of all persons that have selected Accounting and Finance, a sub-category topic code of Business, in the Persons service.

1. **Persons - More Actions - Create View.**
2. Enter **Accounting and Persons TC** in the **Name** field.
3. Click on the **General** dropdown and select **Filters**.
4. Click on the **Add Filter** button.
5. Type **Topic Code** in the text box.
 - This automatically displays the topic codes service and makes its fields available to cross-filtering.
6. Select the **Topic Code** field (Topic Code ID_Name).



7. Click **OK**.
8. Observe the View Results.

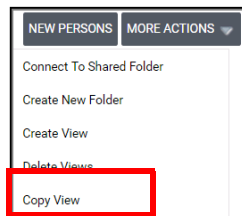
Accounting and Finance TC				
More ▾				
<input type="checkbox"/>	ID	FIRST NAME	LAST NAME	COMPANY
<input type="checkbox"/>	13	Nadia	Miller	Franchi S.p.A.
<input type="checkbox"/>	26	Alexander	O'Neal	Gourmet Lanchonetes
<input type="checkbox"/>	52	Alyssa	Beck	J Communications Division
<input type="checkbox"/>	65	Odessa	Tate	Océano Atlántico Ltda.
<input type="checkbox"/>	91	Reginald	Holland	R.A.I. Display Technology Co., Inc.
<input type="checkbox"/>	104	Fabiola	Tate	Washington DC Chapter
<input type="checkbox"/>	130	David	Neal	Bólido Comidas preparadas

Note - Users will **NOT** see any reference to the topic code selected in view results. It is important to name the View of Topic Codes after the topic code being filtered by as a cross reference.

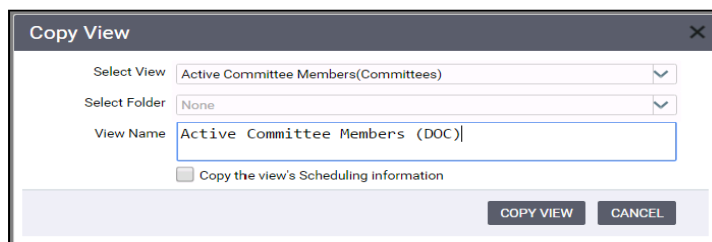
Copying Existing Views

Users may wish to copy views in order to make subtle edits to the fields that display, create additional filters, or simply inherit existing, complex filters and pre-selected fields to ensure accuracy while adding other aspects to the copied view.

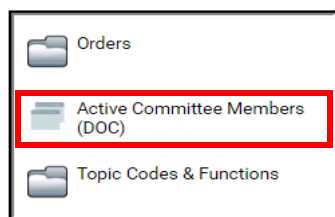
1. Type **Find Orders** in the **Quick Search** and select.
2. Click on the **More Actions** dropdown from the **Find Orders**.
3. Select **Copy View**.



4. From the **Copy View** dialog box, click on the **Select View** dropdown.
5. Select **Active Committee Members (Committees)**.
6. Delete the word, “Copy -” from the View Name field.
7. Add your initials to the End of the View Name.
 - This indicates this view is a copy of an existing view for future reference.



8. Click the **Copy View** button.
9. The View now displays as a personal owned view outside the folder structure.



10. Users can now access and edit the view.
11. Add the **Find Orders (Copy)** to **Favorites**.

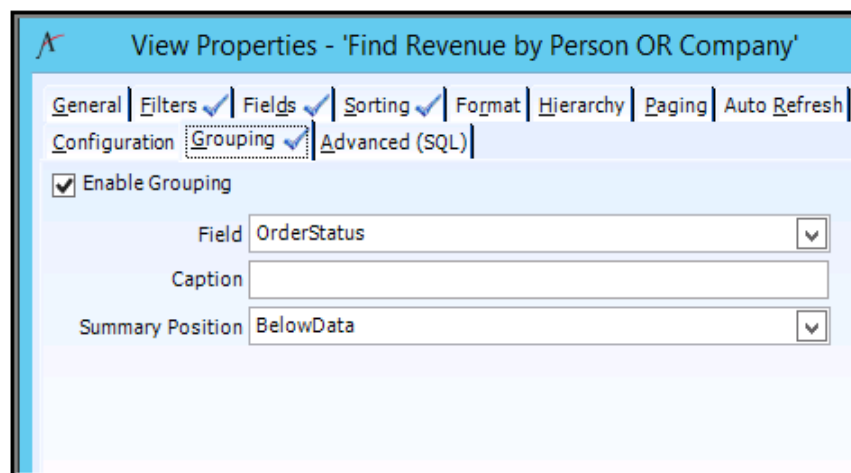
Grouping Data in Views (Desktop)

Users can group records in a list view by common characteristics, and display a summary of the grouped records, which makes it easier to interpret and analyze data. For example, a user can group similar Orders records together, and then display the total value of those orders.

This is an extremely valuable function to End Users since it avoids most reasons to export data to Excel for quantifying purposes, instead, users can aggregate most data and view the results from a View in Aptify.

This option is currently available for configuration in Desktop Aptify, but once created, users can interact with, and view the results in, Aptify Web.

1. Open **Aptify Desktop**.
2. Navigate to the **Orders** service.
3. Right click on the **Orders** service from the Navigation bar.
4. Select **Create View** from the menu.
5. Enter **Orders per Company** in the Name field.
6. Select the **Grouping** tab.
7. Click the **Enable Grouping** checkbox.
8. From the **Field** drop-down, select **Company**.
9. From the **Summary Position** drop-down, select **BelowData** to indicate the summary is to display in the view below the count by company.



10. Select the **Fields** tab.
11. **Expand** the View Properties window.
12. Select the **ID** row by clicking once.

13. Use the bottom scroll bar, move to the far right of **Selected Fields** section and find the **Aggregate Function** column.
14. Click the **Aggregate Function** cell in the **Grand Total** row, then click the down arrow.
15. Select the **Sum** value.
16. Click the **Aggregate Function** cell in the **Balance** row, then click the down arrow.
17. Select the **Sum** value.
18. Ensure only the displayed fields in the screenshot our present
 - Select fields not in Selected Fields section of screenshot by using Shift Key and selecting as in Excel
 - Then click the left-facing, centrally located arrow

Selected Fields:							
Field	Data Type	Display Name	Hyperlink	Target Field	Target Entity	Show Decrypted	Aggregate Function
OrderStatus	Text	Order Status	<input type="checkbox"/>	Name	Order Status Typ	<input type="checkbox"/>	
OrderDate	Date/Time	Order Date	<input type="checkbox"/>			<input type="checkbox"/>	
BillToName	Text	Bill To Name	<input checked="" type="checkbox"/>	FirstLast	Persons	<input type="checkbox"/>	
BillToCompany	Text	Bill To Company	<input checked="" type="checkbox"/>	Name	Companies	<input type="checkbox"/>	
Line1_ProductCa	Text	Line1_ProductCategory	<input type="checkbox"/>			<input type="checkbox"/>	
Line1_ProductNa	Text	Line1_ProductName	<input type="checkbox"/>			<input type="checkbox"/>	
OrderType	Text	OrderType	<input type="checkbox"/>	Name	Order Types	<input type="checkbox"/>	
GrandTotal	Number	Total	<input type="checkbox"/>			<input type="checkbox"/>	Sum
Balance	Number	Balance	<input type="checkbox"/>			<input type="checkbox"/>	Sum
ID	Number	ID	<input type="checkbox"/>			<input type="checkbox"/>	
ShipToCompany	Text	Ship To Company	<input checked="" type="checkbox"/>	Name	Companies	<input type="checkbox"/>	
ShipToName	Text	Ship To Name	<input checked="" type="checkbox"/>	FirstLast	Persons	<input type="checkbox"/>	
CurrencyTypeID	Number	CurrencyTypeID	<input type="checkbox"/>	ID	Currency Types	<input type="checkbox"/>	

19. Click on the **Filters** Tab.
20. Add a Prompted View: **Bill To Company - Exactly Matches - (Text Box Prompt)**.
21. Add a second filter: **Order Status - Exactly Matches - Shipped**.

FilterID	Service	Field	Operator	Value
2	Orders	Bill To Company	Begins With	<PROMPT DEFAULT
3	Orders	Order Status	Exactly Matches	Shipped
4	Orders			

Filter Logic:
1 AND 2

Buttons: Hide Advanced, Reset Filter Logic, Prompt Wizard, Optimize Sub-Queries (checked), Save Template..., OK, Cancel

22. Click **OK**.

23. Enter the **Ottoman** in the **Company** Prompt Box that displays.
24. Observe the results in **Desktop**.
 - A list of all Orders for Ottoman is grouped by **Shipped** Status
 - Both the **Total** and **Balance** fields are summed below those columns

Order Status	Order Date	Bill To Name	Bill To Company	Line1_ProductCategory	Line1_ProductName	OrderType	Total	Balance
Shipped	4/1/2010	Jessica Hale	Ottoman	Desks	Secretary Desk	Regular	\$2,520.00	\$2,520.00
	4/8/2010	Xia Johnson	Ottoman	Standards	Sampco Standards Volume I	Regular	\$192.00	\$96.00
	2/28/2010	Xia Johnson	Ottoman	Shirts	Sampco Golf Shirt	Regular	\$130.05	\$130.05
	2/28/2010	Gary Carter	Ottoman	Chairs	Side Chair	Regular	\$720.00	\$720.00
	2/28/2010	Yale Wade	Ottoman	Sweaters and Sweatshir	Sampco Merino Wool Sweater	Regular	\$216.75	\$216.75
	2/28/2010	Pablo Harris	Ottoman	Tables	Rectangular Conference Table	Regular	\$8,925.00	\$8,925.00
	2/28/2010	Jessica Hale	Ottoman	Sweaters and Sweatshir	Sampco Merino Wool Sweater	Regular	\$926.25	\$926.25
	7/18/2007	Baka Lambert	Ottoman	Shirts	Sampco Tank Top	Regular	\$30.00	\$15.00
	7/18/2007	Pablo Harris	Ottoman	Memberships	Individual Membership	Regular	\$2,700.00	\$1,350.00
	7/18/2007	Edward King	Ottoman	Mugs and Glasses	4oz Sampco Glass	Regular	\$1,569.40	\$784.70
	7/18/2007	Jessica Hale	Ottoman	Exhibits	2008 Sampco Exhibition	Regular	\$2,880.00	\$1,440.00
	7/18/2007	Yale Wade	Ottoman	Exhibits	2008 Sampco Exhibition	Regular	\$3,200.00	\$1,600.00
	7/18/2007	Xia Johnson	Ottoman	Educational Seminars	Executive Succession Planning	Regular	\$280.00	\$140.00
	7/18/2007	Valerie Garner	Ottoman	Magazines and Journals	Sampco Quarterly	Regular	\$252.00	(\$10.00)
	9/4/2013	Baka Lambert	Ottoman	Educational Seminars	Financial Planning Update Fall 2013	Regular	\$170.62	\$170.62
	1/15/2013	Baka Lambert	Ottoman	Books	The History of Sampco	Regular	\$253.00	\$0.00
	9/6/2013	Jessica Pintaro	Ottoman	Exhibits	XYZ Expo	Regular	\$7,500.00	\$0.00
	4/16/2014	Baka Lambert	Ottoman	Educational Seminars	XYZ Course	Regular	\$600.00	\$600.00
	4/16/2014	Baka Lambert	Ottoman	Educational Seminars	XYZ Orientation	Regular	\$400.00	\$400.00
	4/27/2015	Baka Lambert	Ottoman	Hats	Sampco Baseball Hat	Regular	\$19.95	\$0.00
2/14/2017	Baka Lambert	Ottoman	Memberships	Corporate Membership	Regular	\$1,500.00	\$0.00	
Order Status: Shipped							34985.02	20024.37

25. Re-open **Aptify Web**.
26. Locate the view under **Persons**.
27. **Run** the View.
28. Observe the **Totals** aggregated at the bottom of the **Total** and **Balance** fields.

BILL TO COMPANY	LINE1_PRODUCTC...	LINE1_PRODUCTNAME	ORDERT...	TOTAL	BALANCE
Ottoman	Educational Seminars	Executive Succession Planning	Regular	\$280.00	\$140.00
Ottoman	Magazines and Journals	Sampco Quarterly	Regular	\$252.00	(\$10.00)
Ottoman	Educational Seminars	Financial Planning Update Fall 2013	Regular	\$170.62	\$170.62
Ottoman	Books	The History of Sampco	Regular	\$253.00	\$0.00
Ottoman	Exhibits	XYZ Expo	Regular	\$7,500.00	\$0.00
Ottoman	Educational Seminars	XYZ Course	Regular	\$600.00	\$600.00
Ottoman	Educational Seminars	XYZ Orientation	Regular	\$400.00	\$400.00
Ottoman	Hats	Sampco Baseball Hat	Regular	\$19.95	\$0.00
Ottoman	Memberships	Corporate Membership	Regular	\$1,500.00	\$0.00
				SUM:	SUM:
				34985.02	20024.37

Use the Quick Search to run these additional examples of Grouped Views:

- **Find Revenue by Person OR Company**
- **Find Revenue Grouped by Product per Co or Person**

Managing and Sharing Views

Distributing Views via the Views Service:

1. Administrator creates a View under **Framework, Views** service.
2. Administrator assigns the View to a manager or possibly to a specific end user.
3. The manager (or end user) can then share the views with other users, via Shared Folders.

Distributing Views via Shared Folders:

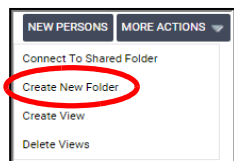
1. A manager (or end user) creates a View in their local instance of Aptify.
2. A manager (or end user) places a View in a Shared Folder.
3. The manager (or end user) informs their team that they can connect to the Shared Folder.

Important - Aptify recommends that new/critical (not pre-loaded) Views be created by an administrator or manager and then placed shared in folders or, when appropriate, embedded in dashboards. This enables standard business processes, ensures Views accuracy, and allows managers to quickly update Views for all end users via centralized folders. End users can then create their exception views - views that only they personally use (not shared) by copying those existing views to ensure a baseline of accuracy.

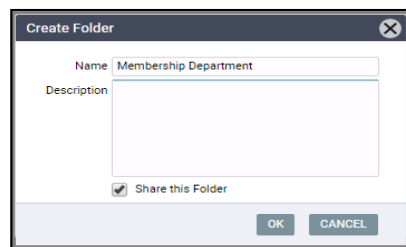
Creating Shared Folders and Shared Views

Creating a shared folder is the same in any service.

1. Select the **Persons** Service.
2. Click **More Actions**. From the drop-down, select **Create New Folder**.

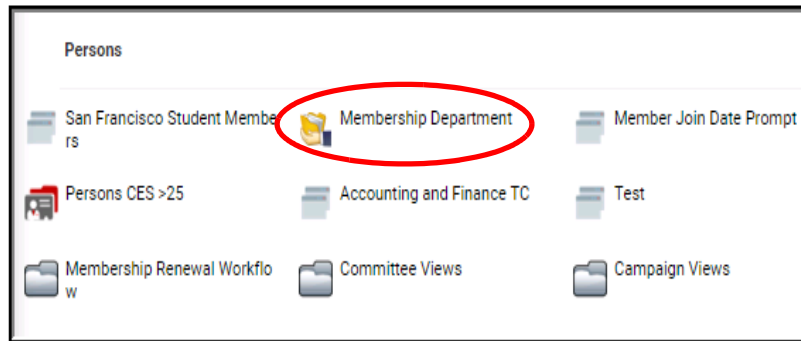


3. In the **Name** field enter, **Membership Department**
4. Provide a **Description**

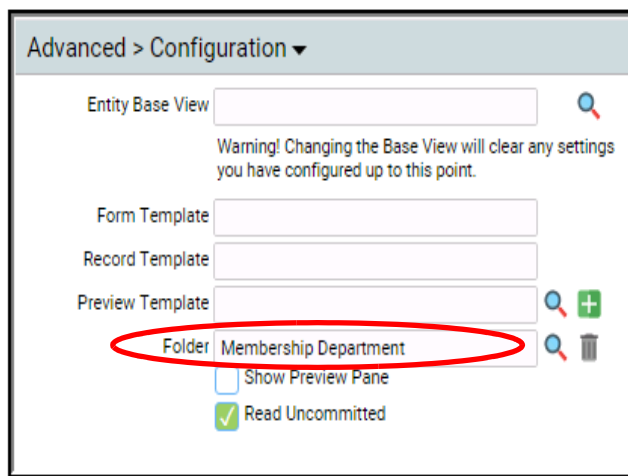


5. Click to select the checkbox indicating to **Share this Folder**.
 - For folders that are not to be shared, leave the box unchecked.

6. Click **OK**.
 - The folder will display on the Service screen with a hand holding the folder.
7. Click the **Membership Department** folder, making it the active folder.



8. Click **More Actions - Create View**.
9. Provide a sample view **Name** (of your choice)
10. Click the **General** tab; click the **Advanced > Configuration** tab.
11. Note that the **Folder Name** field auto fills with the shared folder name.



12. Click **Advanced** in order to select **Filters** and **Fields** to complete your view.
13. Click **OK** to run the view.
14. Note the shared folder icon embedded in the **Persons** service in upper left corner.

Note: A user can add views to any folder that they own, but NOT to one they do not.

Chapter

5

Reports

Objective.....	5.1
Exporting a View to Microsoft Excel.....	5.2
Creating Reports.....	5.4
Running a Report.....	5.5
Analysis Reports.....	5.8
Creating Mailing Labels with Crystal Reports.....	5.11

Objective

In this section, users will see further applications of utilizing views to not only report data but communicate it as well. The exercises provide practice in understanding some of the Aptify reporting features including how Aptify integrates with Microsoft Excel, how to run a Report, and how Aptify integrates with Business Objects Crystal Reports® and with Microsoft SSRS (SQL Server Reporting Services). The reporting functionality and exercises in this section will apply to SSRS reports as well.

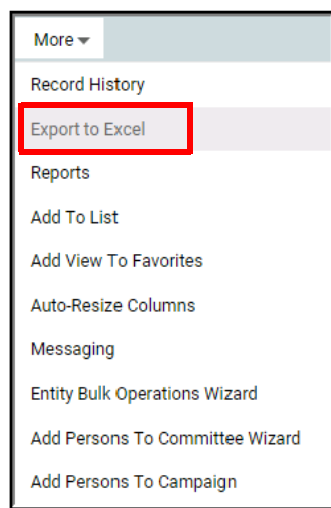
After completing this section, users will know the process for:

- Exporting a view to Microsoft Excel
- Working with Lists
- How to run Reports

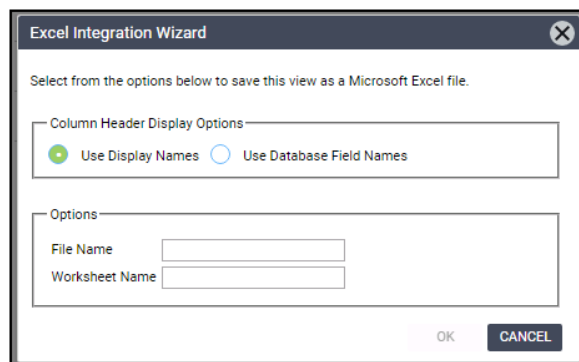
Exporting a View to Microsoft Excel

The following directions explain how to export a specific views' results (Companies) to Excel.

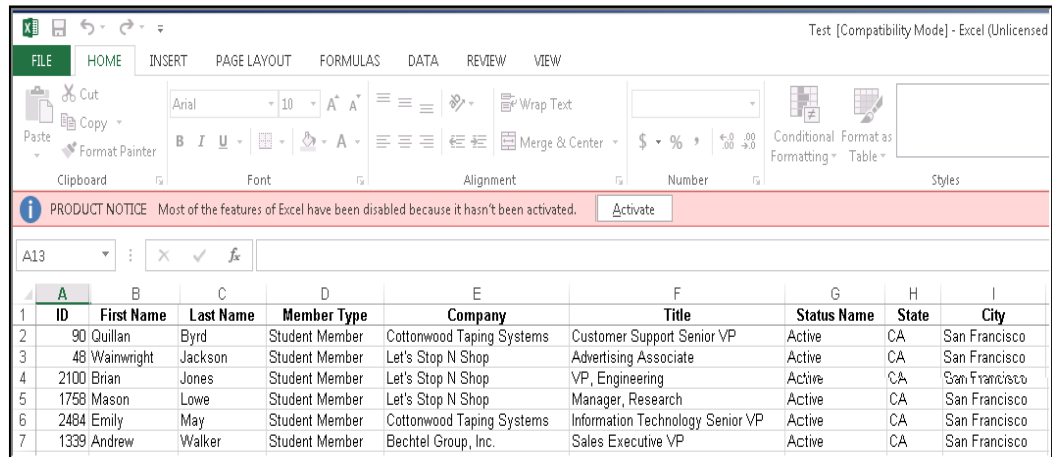
1. Open the **San Francisco Student Members** view from **Persons**.
2. From the view button bar, click the **More** button;
3. Select **Export to Excel** to launch the Excel Integration Wizard.
 - To select all records, a user should not have any records selected when they click this icon (otherwise, only the selected record(s) will be exported rather than all records in the view). If a record has accidentally been selected, click Refresh.
 - To export only specific records, do so before clicking Export to Excel.



4. From the **Column Header Display Options**, select **Use Database Field Names**.
5. Enter a sample **File Name**. (File name is required to activate **OK** button).



6. Click **OK**. The Excel icon download appears in the lower-left corner; click to open.
 - A Microsoft Excel window appears; the window contains the information from the view.
 - After exporting the view data to Microsoft Excel, you can format the spreadsheet and resize the columns as necessary.



7. Close Microsoft Excel without saving the file.

Creating Reports

While the View system provides capabilities to filter and sort data, it is most effective for displaying results in a tabular format. To provide a more formalized, form based output, Aptify integrated Crystal Reports® into the Viewing system.

Using the Reports function, an option located under the More Actions menu of every View, a view can be exported using a variety of report formats. The Report wizard can generate **standard reports, mailing labels, export records, print name badges**, etc.

The Report Wizard walks the user through the steps to generate reports. Although there are general types of reports that apply to all of the services, most reports are service-specific. The general reports in every service are the List, Detail, and Export reports.

List and Detail reports print out information contained in the View. Export reports are often useful for selecting specific fields and records from the service and exporting them for use in other software applications.

Reports specific to a service are listed on various category tabs in the Report Wizard. These reports can be modified or replaced as required. System administrators can add client-specific reports to a particular service.

Crystal Reports is a database reporting tool created by SAP (<http://www.sap.com/solution/sme/software/analytics/crystal-reports/index.html>). **An administrator can create new customized Crystal Reports for an organization but you need to purchase a license from SAP first.**

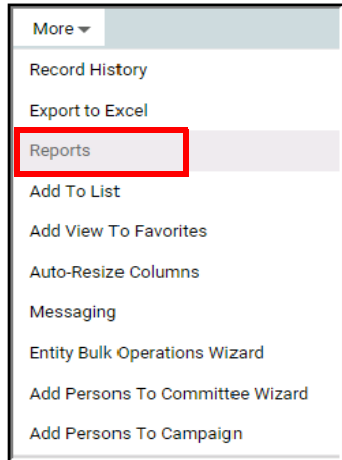
Notes: When printing mailing labels, the List ID appears on each label for marketing purposes--users can identify information about the mailing (such as when the label was printed) based on the List ID.

Aptify ships Orders using several service-specific reports.

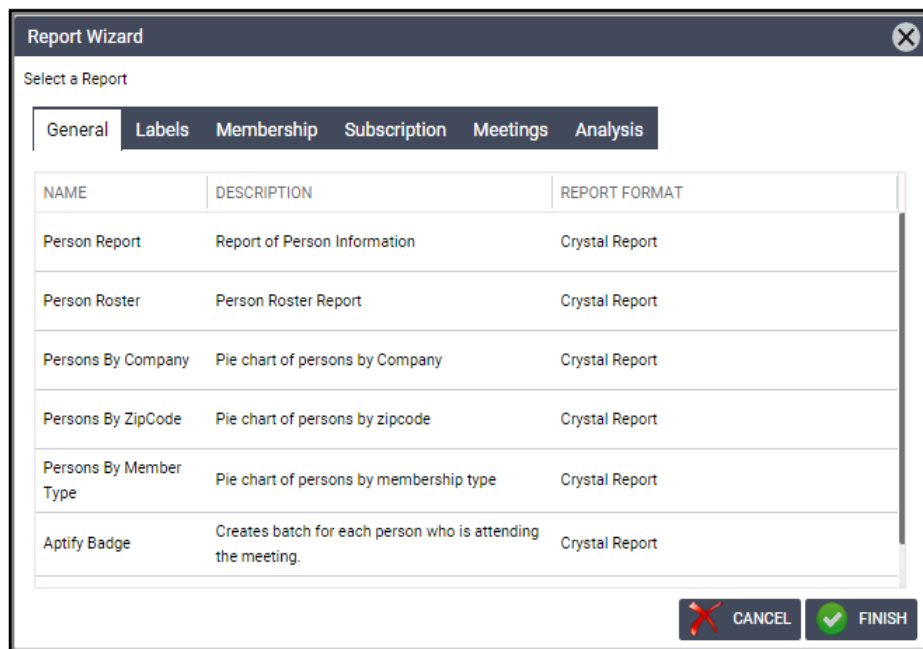
Running a Report

In this section, users will learn how to export data from a view to a text file.

1. Open the **San Francisco Student Members** view.
2. Click the **More** button.
3. Select **Reports**.



4. Observe the various types of possible reports.
 - Each tab has subsequent choices as well. Click to examine the possibilities.

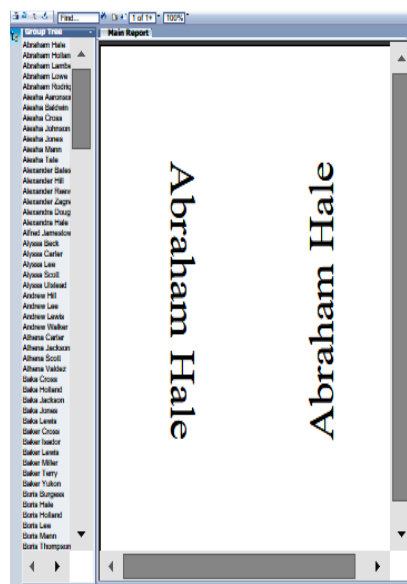


5. Of the report types, select **Person Roster**, click **Finish**. The report will show information based on data from the persons' records in the view.
 - These functions can also be completed in other services, Companies, etc. as shown below

Person Roster		
9/12/2014		
Person	Company	
Aiesha Baldwin Marketing Senior Director 2 910 Southwest Union Avenue Palo Alto, CA 94301	Dambe Partners	1 (650)
Athens Scott Marketing VP 5197 Colleen Court Sacramento, CA 94203	Akebono Cryogenics Incorporated	1 (916)
Dacey Yukon Research Associate 8383 North Colombo Street Suite 235 Milpitas, CA 95035	Polyhedron Power Devices	1 (408)
Emily Robinson Research Associate VP 29173 Main Street Suite 531 Menlo Park, CA 94025	VC Osaka Technologies Group, Inc.	1 (650)
Habiba Harris Research Executive VP 22906 Main Street Palo Alto, CA 94301	X.E. Awaken Components Limited	1 (650)

Main Report		
ACE Aviation Holdings Inc. Air Canada Centre 7371 Côte Verre Blvd. West Saint-Laurent, QC H4Y 1H4 CANADA	91 DPWA Capital, Inc. 7177 South Divisadero Avenue Mountain View, CA 94035	91 Greenhill Fintech Greenock, MD 20760
Alchono Cryogenics Incorporated 5197 Colleen Court Sacramento, CA 94203	91 EK Techno Business Inc. 6137 Carmel Street Palo Alto, CA 94301	91 GROSSELLA-Restaurante 5' Av. Los Palms Grandes 1061 Caracas VENEZUELA
Alfreda Fatschke Oliver Str. 57 12209 Berlin GERMANY	91 Folk och G 108 Åkergatan 24 S-444 07 Bräcke SWEDEN	91 Hanao Carroz Rua do Paço 47 RIO DE JANEIRO RJ BRAZIL 05454-576
Ana Trujillo-Espuchado y helado Avda. de la Constitución 2222 MEXICO D.F. 68021 MEXICO	91 France restaurant 54, rue Royale 44000 Nantes FRANCE	91 HILARION-Aludus Carera 22 con Av. Carlos Soublette #8-35 5022 San Cristóbal VENEZUELA
Bhair Industries 111 Main Street Washington, DC 20006	91 Freccioni AG Ehe-Kelco-Strasse 1 Bad Homburg GERMANY	91 Honeywell International Inc. 101 Columbia Rd. Morristown, NJ 07962
Centro comercial Mestram Sierra de Granada 9993 MEXICO D.F. 68022 MEXICO	91 GE Commercial Finance 260 Long Ridge Rd. Stamford, CT 06904	91 J Communications Division 5690 East Lyons Avenue San Diego, CA 92101

6. Close the report, Click the **More** button; select **Reports** again to try other options.
7. Click the **Meetings** tab, select Meeting Tents, and a foldable name tent will be created for all records in the view



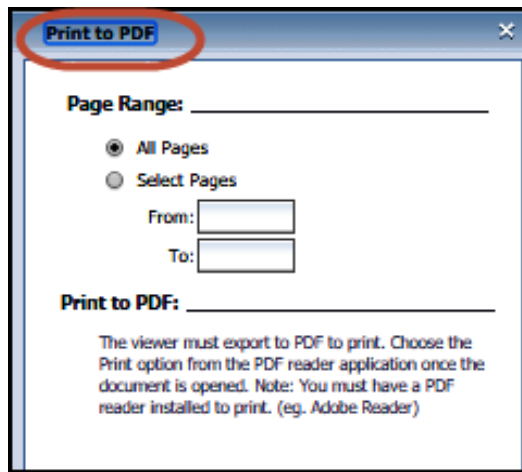
Print or export any report

To export or print a report, click the top, left corresponding buttons.

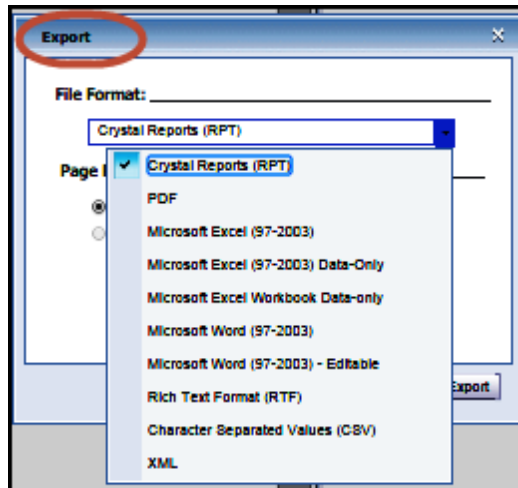
- After creating the export file, you can import its contents into another program, such as Microsoft Word or Excel.



Print:



Export:

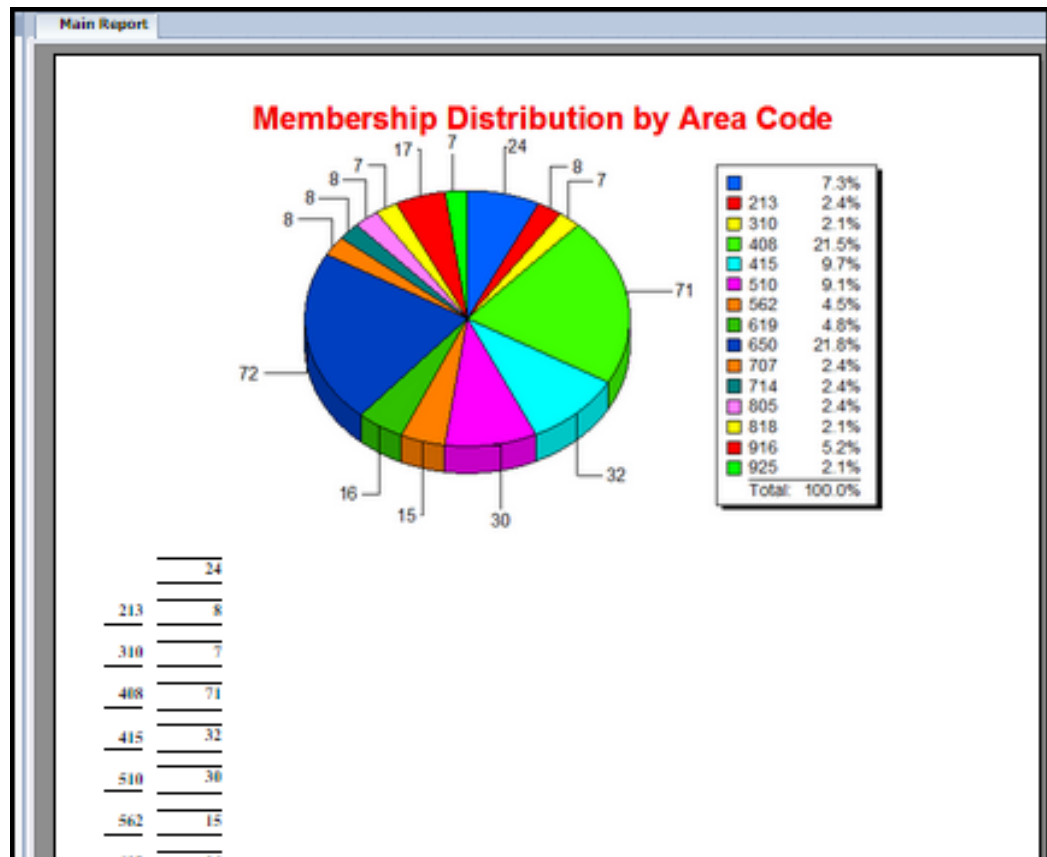


Analysis Reports

In this section, users will learn how to run several Crystal Reports.

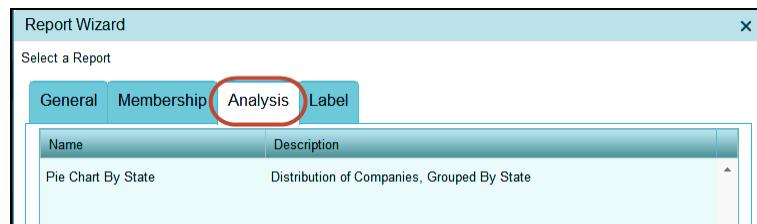
To create a pie chart of members/persons by zip code/area code:

1. From a view such as **Persons in CA**, click the **More** button.
2. Click **Reports**.
3. From the **Membership** tab, click to select the **Pie Chart of Membership by Area Code**.
 - Note other options from the **General** tab: **Persons by Zip Code** or **Pie Chart of Persons by Membership by Type**.
4. Click **Finish**.

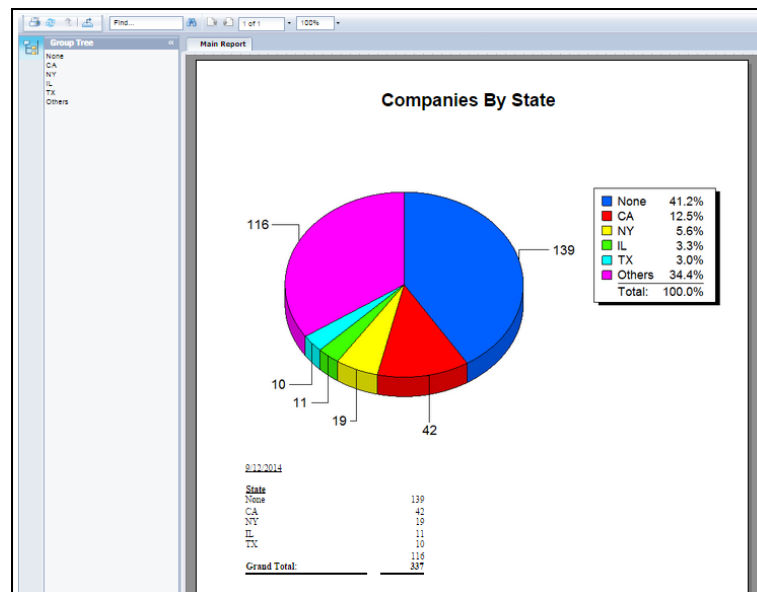


To create an analysis report of companies data:

1. Open the **Companies** Service and click to open the **General Look up Views** folder.
2. Run a view, such as, **All Companies**. Click the **More** button; from the drop-down, select **Reports**.
 - The Report Wizard launches and displays the list of reports supported by the Companies service.
3. Click the **Analysis** tab.
4. Select the **Pie Chart by State** report. (Note that this is a Crystal Report.)



5. Click **Next**.
6. Click **Finish** to preview the report.
 - A window opens that contains the report. The company data on the class system differs from the example below but your results should look something like this:



7. Double-click one of the slices in the pie chart to display the records that correspond to the pie slice.

In order to return to the main screen of the report, click the *grey* tab in the upper corner of the view.

8. Click the **X** in the upper corner of the Crystal Reports window to close the report.

Company Report

1. Open the **Companies in Oregon** created earlier, click the **More** button.
2. Click **Reports**.
3. Under the General tab, click one of the Companies reports.

Company Report

1 of 7 9/12/2014

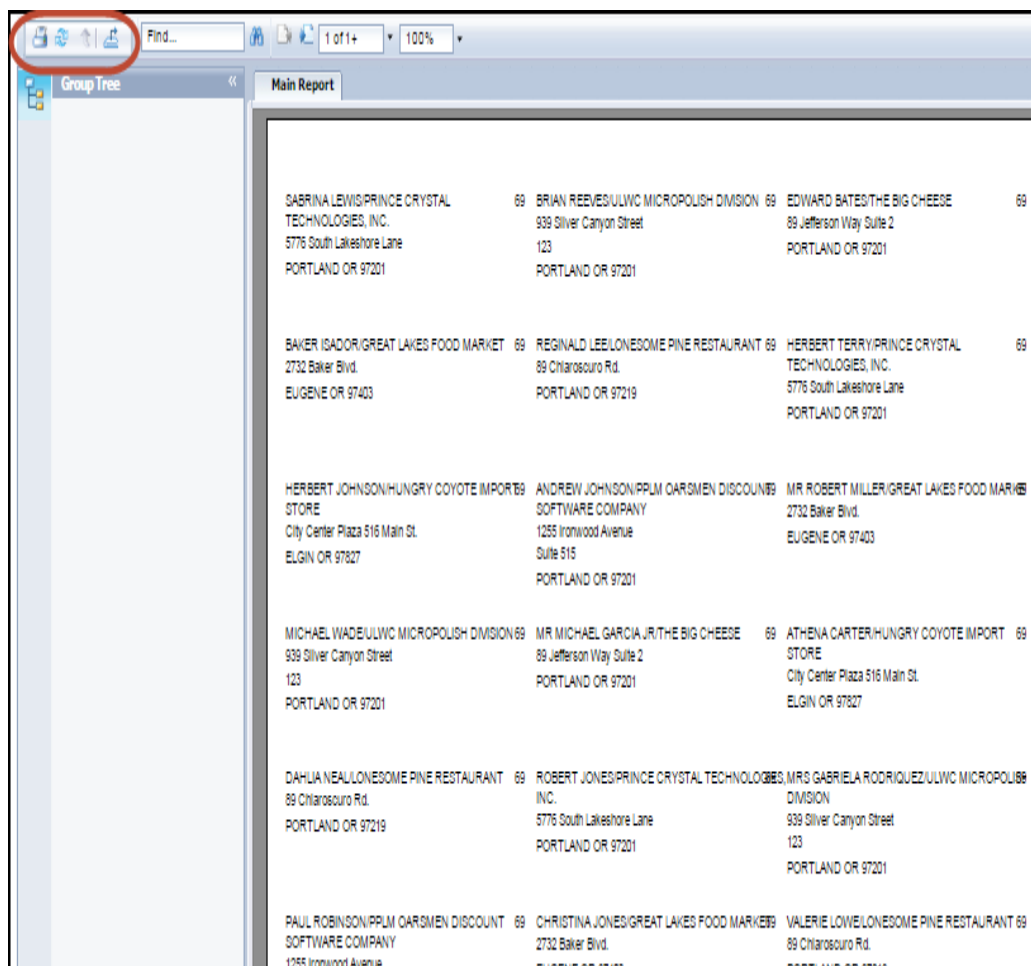
Prince Crystal Technologies, Inc.

Company ID: 18	Business Type: Other For Profit
Main: 5776 South Lakeshore Lane Portland, OR 97201	Billing: 5929 Bixby Street Corvallis, OR 99885
Main Phone: 1503-869-3657 Main Fax: 1503-806-9006 Main Email: main@princrytecinc.com Web Site: http://www.princrytecinc.com	MemberType: Corporate Member JoinDate: 8/1/2007 MailCode: C001 USCongress: StateSenate: D&B Rating: StateHouse: Taxes:
Parent Co: Established: 1/20/1994	No. Empls: 58,236 Revenue: \$0.00

Comments:

Creating Mailing Labels with Crystal Reports

1. Open the **Persons in OR** view created earlier.
 - This can be done with views in other services as well
2. In the view toolbar, click the **More** button. Click **Report**.
3. Click the **Labels** tab.
4. Select **Avery 5161 Label** and click **Finish**.
 - Using a printer with the Avery 5161 Label sheets, the labels can be directly printed from the Crystal Report window.
 - Alternatively, a user could export the report to another format by clicking the **Export** button.



5. Close the Crystal Report.

Chapter 6

Contact Logs

Objective.....	6.1
Understanding Contact Logs	6.2
Creating a Contact Log from the Persons Service.....	6.3
Using the New Contact Log Entry Wizard.....	6.5
Contact Log Spaces	6.6
Contact Log Views	6.8

Objective

In this section, you will understand how to use the Contact Log service. Contact Logs are used to track customer interactions throughout the Aptify system. They can be created manually from several locations or automatically created as part of a process flow.

After completing this chapter, you will be able to:

- Understand Contact Logs
- Create a Contact Log from the:
 - Persons Service
 - Employees Service

Understanding Contact Logs

Users can keep track of their interactions with customers by creating a Contact Log record each time they communicate with a customer (via mail, telephone, fax, e-mail, etc.). The most common use of a Contact Log is from a Persons record where an Add Contact Log Action button is embedded in the Landing Page.

Users can **link a Contact Log record to one or more related records in another service**. For example, a Contact Log record detailing a telephone conversation with Anthony Atkins regarding a specific order can be linked to Anthony Atkins's Persons record, an Employees record, and the relevant Orders record.

The **Contact Logs service also integrates with Microsoft Outlook**. If an organization uses Microsoft Outlook for email, follow-up appointments scheduled within a Contact Log record automatically appear in the Outlook Calendar.

Users can create a Contact Log from the Contact Log tab on another form, such as the Persons, Employees, or Orders form. When a new Contact Log record is opened from a Persons, Employees, or Orders record, Aptify automatically adds a link to that record in the new Contact Log's Link tab.

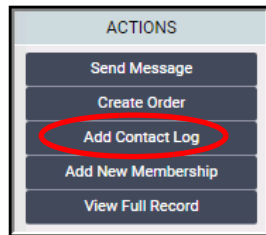
Contact Logs can be auto generated by a process flow in Aptify. When an order is shipped, Aptify can automatically generate a contact log. When a Bulk Message is sent, Aptify can automatically generate a contact log.

Contact Logs can be routed internally in Aptify by leveraging Dashboard Views. An embedded view in a dashboard, such as the My Contact Logs view in the Training DB's Home dashboard, can be very effective in alerting the logged in user as to which records demand their attention. These views are easily built and embedded by Administrators with direction from the requesting department. The filters on these embedded views can be very directed by leveraging the **SQL Value Statements for Views** located in **Appendix F** of this manual.

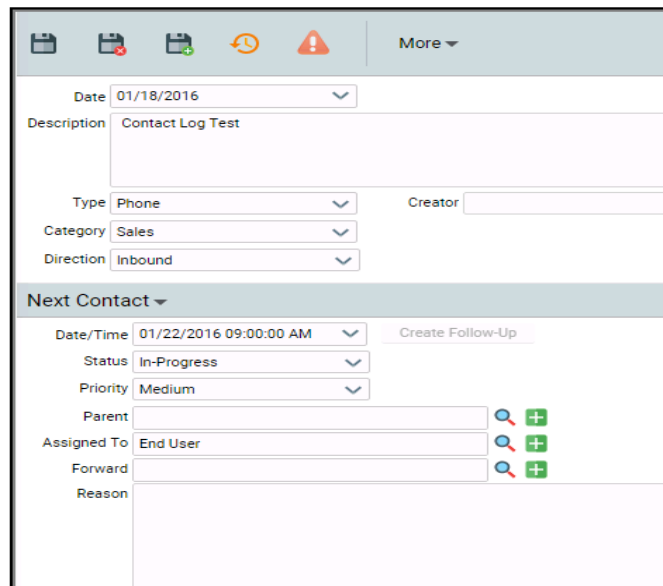
Creating a Contact Log from the Persons Service

A user can create a Contact Log record from the Persons, Employees, Orders, or Contact Log service. In this exercise, a user will create a Contact Log record from a Persons record.

1. Open a **Persons** record from the **Home** dashboard, **Recently used Records**.
2. Click the **Add Contact Log** button from the **Actions** menu.



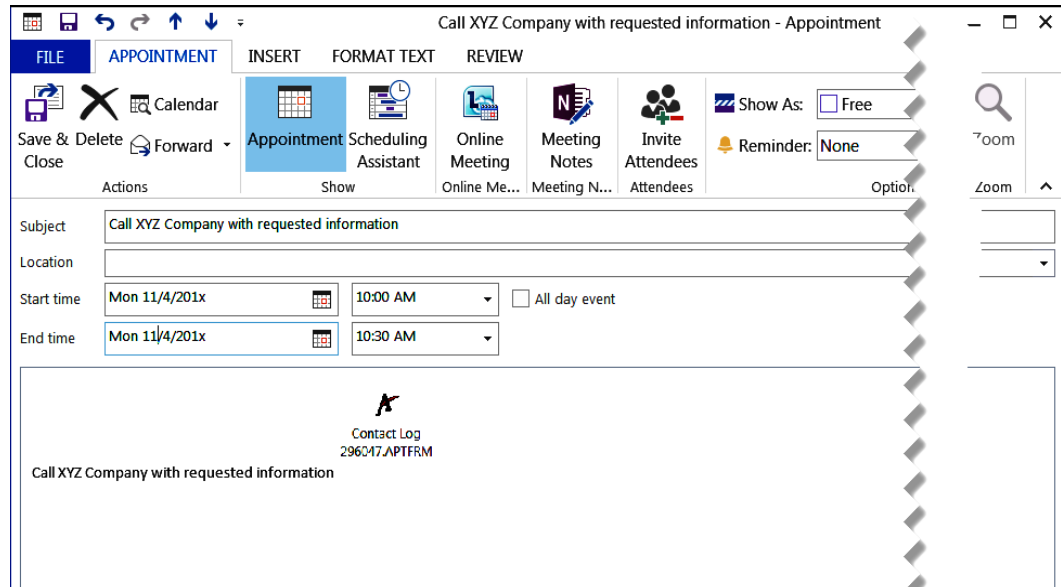
3. The **Contact Log** displays with the Date/Time auto-generated.
4. In the **Description** field, enter **Contact Log Test**.
 - When running a view of Contact Logs, the contents will be a display field.
5. Leave the **Type** field set to **Phone** and **Category** set to **Sales**.
6. Change the **Direction** to **Inbound** (customer initiated contact).
7. Enter the last day of the current week and a time of **9:00 AM** in the **Date/Time** field.
8. From the **Status** drop-down list, select **In-Progress**.
9. In the **Assigned To** field, enter End User and select.
10. In the **Reason** field, enter **Test**.

A screenshot of a web-based form for creating a contact log. The form has a light blue header with icons and a 'More' dropdown. Below the header, there are several input fields: 'Date' (01/18/2016), 'Description' (Contact Log Test), 'Type' (Phone), 'Category' (Sales), and 'Direction' (Inbound). A 'Next Contact' section contains 'Date/Time' (01/22/2016 09:00:00 AM), 'Status' (In-Progress), and 'Priority' (Medium). Below this are fields for 'Parent', 'Assigned To' (End User), 'Forward', and 'Reason'. Each of the last four fields has a magnifying glass icon and a green plus sign to its right.

11. Click **Save**.

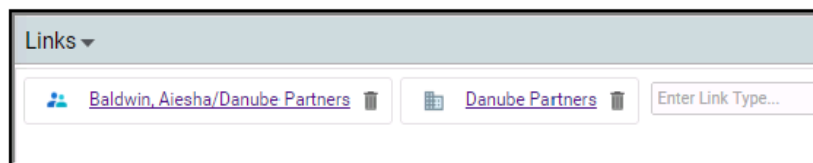
12. When a Contact Log is **created and saved**:

- Aptify auto-adds the user name in the **Creator** field.
- If Microsoft Outlook installed on users computer, Aptify automatically creates an appointment (shown below) based on the info provided in the Next Contact tab.



13. On the Contact Log record, select the **Links** section heading.

- Two links are listed - Aptify automatically adds a link to the originating Persons record and that person’s Companies record.



14. Click **Save**, then **Close** the record.

15. Return to the **Persons** record.

16. Close the **Persons** record.

Using the New Contact Log Entry Wizard

Using the Contact Log Wizard from the Home or Customer Management Dashboard can save time if the user is already aware of the Person's ID.

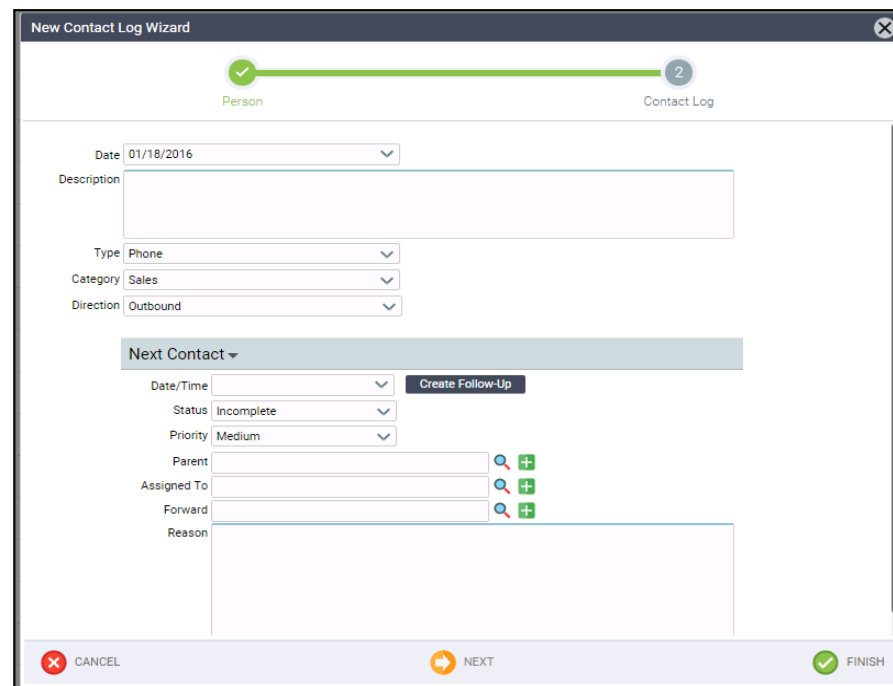
1. Select the **Contact Log Wizard** Button from the **Home** dashboard.



2. Enter **01** in the **PersonID** field - this should embed Aiesha Baldwin's record.

A screenshot of a web form titled 'New Contact Log Wizard'. At the top, a progress bar shows two steps: '1 Person' and '2 Contact Log'. The 'Person' step is active. Below the progress bar, the text reads 'Select the Person you would like to link to the Contact Log:'. A text input field labeled 'PersonID' contains the text 'Baldwin, Aiesha/Danube Partners'. To the right of the input field are search and delete icons. At the bottom, there are 'CANCEL' and 'NEXT' buttons.

3. Click the **Next** button.
4. Fill out the remaining fields on the **Contact Log**.

A screenshot of the 'New Contact Log Wizard' form, now on the '2 Contact Log' step. The progress bar shows '1 Person' completed with a green checkmark and '2 Contact Log' active. The form contains several fields: 'Date' (01/18/2016), 'Description' (empty text area), 'Type' (Phone), 'Category' (Sales), and 'Direction' (Outbound). Below these is a 'Next Contact' section with a dropdown arrow. This section includes: 'Date/Time' (dropdown), 'Status' (Incomplete), 'Priority' (Medium), 'Parent' (input field with search and add icons), 'Assigned To' (input field with search and add icons), 'Forward' (input field with search and add icons), and 'Reason' (empty text area). At the bottom, there are 'CANCEL', 'NEXT', and 'FINISH' buttons.

5. Click **Finish**.

Contact Log Spaces

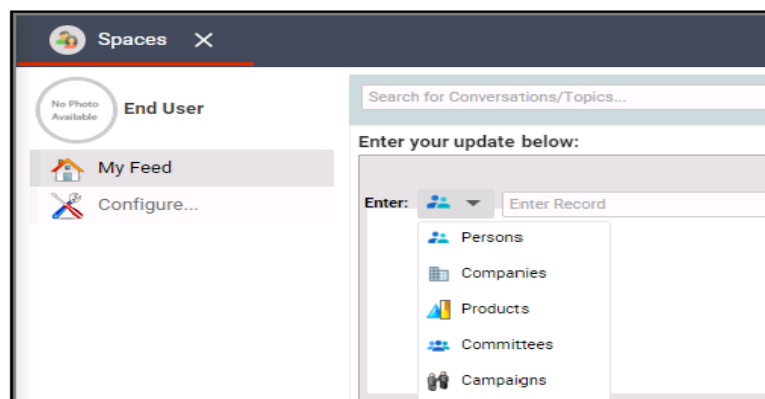
Spaces is Aptify's version of social streaming tools which acts as a gateway for users to quickly perform common functions including creating records or assigning tasks. It provides a way for users to work within Aptify and collaborate with others without leaving Aptify.

There are a variety of methods for posting information and responses. In addition to enabling users to receive relevant info via a news feed, Spaces provides the following functions:

- Information can be linked or tracked to specific records or people within a post.
- Users can comment on specific actions with links to related records, such as, Tasks, Contact Logs and Topics
- Comments can be made in-line as part of an existing thread, including hyperlinks, attachments and images
- Posts can include text, website, images and formatting in available for font, color and other style elements

Users can link records to a Spaces post using the Link button or by using the @ in their post.

1. Open Spaces from the Applications menu.
2. In the **What are you up to?** field, enter **Test**.
3. Click the **@Link**
4. Click on the displayed dropdown - select the **Persons** and enter **Baldwin**.
5. Select **Aiesha Baldwin**.



- Click **Update** from the lower right hand corner.

From the **Actions** tab, a user can create a Task, or from a feed click to select a Task, and act on it without having to go to and open the the Task record. The **Actions** drop-down list allows users to perform updates directly from a Spaces post:

- Create a new Task, assign to yourself or another employee
- Task Update (percentage complete on a particular task)
- Follow up creates a Contact Log

- Click **Action**. From the drop-down, select **Follow Up**.



- Click **Update**.

- This creates a Contact Log where both parties are notified of the information.

Linking a record to a spaces post alerts other readers and provides access to that record. Spaces includes a notification feature, located on the main toolbar, allowing users to receive notification while working in any function of Aptify.

When something new is posted that tags a user, the alert icon (bell) will indicate the number of current alerts.



Clicking the alerts icon displays a drop-down list of alert details. Clicking the link to a specific alert opens the post selected. Once a post is selected, it is removed from the alert list.

Spaces provides Authorization options for specifying who can interact with the thread:

- Public - unrestrictive
- Following - those who have a status of following your information
- Known User - within Aptify, all known users
- Only Me
- My Organization

Contact Log Views

Leveraging Contact Log Filters

Views of Contact Logs that leverage SQL values (see Appendix F for more examples) can quickly present the multiple logs assigned to an employee. These views can be very effective when embedded in Dashboards, such as the My Contact Logs view of the Home dashboard. Below are two examples of View Properties that leverage SQL values to bring exact data back for the logged in user.

1. Using **Quick Search**, find and select the **My In Progress Contact Logs** view.
2. Open the properties of the view (Gear button).

This view's results displays contact logs with an In Progress status for the logged in user.

The screenshot shows the 'View Properties' dialog box for the view 'My In Progress Contact Logs'. The dialog has a title bar with a close button (X) and a header area with 'View Properties' and 'OK' and 'CANCEL' buttons. Below the header, there is a 'Name' field containing 'My In Progress Contact Logs' and a 'View Type' dropdown menu set to 'List View'. A 'Filters' section is expanded, showing a toolbar with icons for adding, editing, deleting, and refreshing filters. Below the toolbar, there are two filter rules:

- Rule 1: Contact Log Assigned To Exactly Matches EMPLOYEE_NAME
- Rule 2: Contact Log Status Exactly Matches In-Progress

 Each rule has a red 'X' icon to its right for deletion.

1. Using **Quick Search**, find and select the **My Recent Contact Log Activity** view.
2. Open the properties of the view (Gear button).

View results displays contact logs over the past 30 days assigned to the logged in user

The screenshot shows the 'View Properties' dialog box for the view 'My Recent Contact Log Activity'. The dialog has a title bar with a close button (X) and a header area with 'View Properties' and 'OK' and 'CANCEL' buttons. Below the header, there is a 'Name' field containing 'My Recent Contact Log Activity' and a 'View Type' dropdown menu set to 'List View'. A 'Filters' section is expanded, showing a toolbar with icons for adding, editing, deleting, and refreshing filters. Below the toolbar, there are three filter rules:

- Rule 1: Contact Log Creator Exactly Matches SUSER_NAME
- Rule 2: Contact Log Date > TODAY-31
- Rule 3: Contact Log Date < TODAY+1

 Each rule has a red 'X' icon to its right for deletion.

Contact Log Base Views

Utilizing Base views is also an effective method for presenting Contact Log data for analysis. Contact Logs can be linked to any Service through the Linked section of a Contact Log. Viewing the associated Contact Logs to a Person or Company while being able to leverage multiple fields from a Persons record can be done by using the **Find Contact Log - Persons (Base View)**.

1. From the **Quick Search**, enter and find the **Find Contact Log - Persons (Base View)**.
2. Enter **End User** in the Employee prompt.
3. Observe the **Results**.
4. As Base View - results show multiple fields from the Persons and Contact Log services.

Find Contact Log - Persons (BASE VIEW)

Person ID: Last Name: Company: Description: Type:

Category: Status: Priority: Employee:

<input type="checkbox"/>	PERSO...	LAST N...	FIRST N...	COMPANY	CL DATE	CLDESCRIPTION	CLT...	CL PRI...	CLSTAT...	EMPL...	CLCATE...	ADDRESS	CITY	ST...	ZIP C...	PHONE AREA...
<input type="checkbox"/>	78	Miller	Dalton	QUICK-Stop	05/10/2... 06:18:54 AM	Request for Meeting Registration packet.	E-mail	Medium	Incomplete	End User	Sales	Business Address	Cune...		01307	
<input type="checkbox"/>	1	Baldwin	Alesha	Danube Partners	05/10/2... 06:09:28 AM	Billing dispute regarding membership dues.	Phone	Medium	In- Progress	End User	Sales	Business Address	Palo Alto	CA	94301	650

Chapter 7

Case Management

Objective.....	7.1
Creating Cases	7.2
Case Views	7.4

Objective

Users will be able to:

- Create Cases
- Track Cases from inception to conclusion

Overview

Case management enables organizations to track their customer's inquiries regarding long term requests or issues and track the resolutions provided. Individual Cases track incidents or tickets and are given a unique record. This enables each customer issue to be tracked and monitored through its history. Which in turn supports the creation of detailed customer and case data centric Views and Reports.

Some common instances where Case Management is used:

- Track Initial Customer Inquiries
- IT Help Desk
- Customer Support requests and Ticketing
- Sales Inquiries
- Peer review
- Ethics violations
- Long term projects

Creating Cases

1. Click the **Case Management** Application.
2. Click on the **New Case** button from the dashboard button bar.
3. In the **Title** field, enter **XYZ Case**.
4. In the **Status** field, enter **Reported**. In the **Priority** field, enter **High**.
5. In the **Category** field, enter **Finance**. In the **Type** field, enter **Complaint**.
6. In the **Company** field, enter the name of **XYZ Corporation** which submitted the case.
7. In the **Contact** field, enter the name of your person (or a persons ID #).
8. In the **Summary** field, enter **Test**.
9. Note the **Date Reported** and **Started** fields default to today's date.
10. In the **Source** field, specify the source of the case as **External**.
11. In the **Manager** field, enter a persons ID #.
12. In the **Type of Assignment** field, enter **Internal**.

The screenshot displays the 'New Cases Record' form in the Case Management application. The form is organized into several sections:

- Title:** XYZ Case
- Parent:** (Empty field)
- Status:** Reported
- Priority:** Low
- Category:** Finance
- Type:** Complaint
- Company:** XYZ Corporation
- Contact:** Baldwin, Aiesha/Danube Partners
- Summary:** Test

The **General** section is expanded, showing the following details:

- Timeline:**
 - Date Reported: 01/18/2016
 - Est. Start Date: (Empty)
 - Date Started: 01/18/2016
 - Est. Completion Date: (Empty)
 - Date Closed: (Empty)
- Source:** External
- Reviewed By:** (Empty)
- Manager:** John Samuels
- Assignment:**
 - Type of Assignment: Internal
 - Date Assigned Internal: (Empty)
 - Primary Internal Assignee: (Empty)
 - Primary Assignee Role: (Empty)
 - Date Assigned External: (Empty)
 - External Company: (Empty)
 - External Contact: (Empty)
- Closure:**
 - Closed By: (Empty)
 - Result: (Empty)
 - Reason: (Empty)

13. Click the **General** tab, select **Details**.
14. In the **Recorded By** field, confirm your name (or End User).
15. For the **Case Report Method**, select **Phone**.
16. Click **Save**. Now more options are available from the General drop-down list.

The screenshot shows the 'Details' section of a case management interface. It includes the following fields and options:

- Case Report Method:** Web (dropdown)
- Recorded By:** End User (text field with search and delete icons)
- Date Recorded:** 01/18/2016 (dropdown)
- Date First Responded:** (dropdown)
- Alternate Contact Name:** (text field)
- Phone:** (text field)
- Description:** (text area)
- Special Needs:** (text area)
- Checkboxes:**
 - Auto Updated Manager
 - Auto Updated Primary Assignee
 - Auto Updated External
 - Did Not Know #

17. Click the **General** drop-down, select **Contact Log**.
18. Click on the **New Contact Log** button.
19. Enter a **Contact Log Description**.
20. Click on the **Links** area - observe the Linked Case.

The screenshot shows the 'New Contact Log' form with the following details:

- Date:** 01/18/2016 (dropdown)
- Description:** Case Contact Log (text area)
- Type:** Phone (dropdown)
- Category:** Sales (dropdown)
- Direction:** Outbound (dropdown)
- Links:**
 - XYZ Case (link, circled in red)
 - Enter Link Type... (text input)

21. **Save and Close** the Contact Log.
22. Observe the **Contact Log** that was created.
23. Review the remaining sections of the **Case** record.
24. **Save and Close** the Case record.

Case Views

1. From the **Quick Search**, enter and find the **Find Cases (BASE VIEW)** view.
2. Enter **Danube** in the **Company** prompt.
3. Observe the **Results**.
 - As Base View - results show fields from the Persons and Cases services.

Find Cases (BASE VIEW)

Person ID: Person: Company:

Status: Case ID:

More ▾

<input type="checkbox"/>	DATE STARTED	CASE ID	COMPANY	PERSON	CASE TITLE	MEMBER TYPE	CASE CATEGORY
<input type="checkbox"/>	12/30/2015	3727	Danube Partners	Aiesha Baldwin	XYZ Case	Member	Finance
<input type="checkbox"/>	01/18/2016	3728	Danube Partners	Aiesha Baldwin	XYZ Case	Member	Finance
<input type="checkbox"/>	09/30/2009	1690	Danube Partners	Alexander Neal	Service Request Finance	Student Member	Finance
<input type="checkbox"/>	05/05/2009	1695	Danube Partners	Alexander Neal	Compliment Meetings	Student Member	Meetings
<input type="checkbox"/>	12/10/2008	1700	Danube Partners	Alexander Neal	Service Request Finance	Student Member	Finance

Chapter

8

Committees

Objectives.....	8.1
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Editing Member Information.....	8.7
Committee Views	8.8

Objectives

In this section, users will use the Committee Management application and will be able to:

- Create a Committee record
- Create Committee Terms
- Add members to committee terms
- Assign titles and ranks to committee members

Overview

Aptify's Committee Management application provides diverse functionality to address the varying committee structures of an organization which may focus on specific tasks or events. The committee may be designed to operate for one function for a short period of time, such as organizing a corporate event, or it may be a long-term project that operates indefinitely. Additionally, committees may be organized into sub-committees.

The Committee Management application revolves around three interacting services.

- **Committees** - tracks overall information about committee and its purpose.
- **Committee Terms** - tracks information specific to the scope of the particular term: Goals, Dates, Accomplishments, Meetings, Notes, etc.
- **Committee Members** - tracks the Persons that are Members and have Roles in the Committee as well as the Dates and Accomplishments of their tenure.

In Aptify, members are associated with the Committee Terms record, which requires each committee to have at least one committee term linked to it.

Note: If a user's organization does not use Committee Terms, they still would create one Committee record and one Committee Term for each Committee.

Creating a Committees Record

A committee record is created once for each committee, then committee terms records are added each term/year, linked to the main committee record. It is rare for a Committee record to be accessed once it is created; most interaction surrounding Committees happens at the Term or Member level.

1. Click the **Committee Management Application**.
2. From the Committee Management dashboard, click the **New Committees** button.
3. In the **Name** field, enter **XYZ Committee** (XYZ= your initials).
4. In the **Organization** field (which ordinarily would be your organization name), enter an ID number of 1, press **Tab** to auto-fill.
5. From the **Committee Type** drop-down, select **Governance**.
6. Note that the record defaults to the **General** tab. Click to see options not yet available.
7. The **Coordinator** field requires an employee name; Type End & select **End User**.
8. Leave **Description** and **Goals** blank - normally these would contain extensive text.
9. From the **Reach** drop-down list, select **National**.
10. In the **Date Founded** field, enter a date [Eleven months prior to today's date].

The screenshot shows a web application interface for creating a committee record. The title bar reads "XYZ Committee (ID: 4)". Below the title bar is a toolbar with icons for save, delete, refresh, and more. The form fields are:

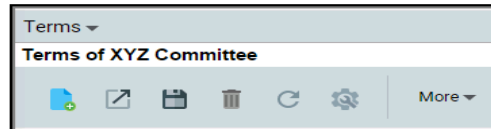
- Name: XYZ Committee
- Parent: (empty)
- Organization: Sampco Holdings, Inc.
- Committee Type: Governance
- General tab:
 - Coordinator: End User
 - Description: (empty)
 - Goals: (empty)
 - Reach: National
 - Date Founded: 01/30/2014
 - Active:

11. Click **Save**.
12. Click the **General** tab and note other tabs now active.

Creating Committee Terms

The Committee Term records tracks the terms of different committees and their information. A term would be the length of time the committee is in session for a year, or other period. Members are designated on the Terms Record.

1. On your **Committees** record, **General** tab drop-down, select the **Terms** tab.
2. Click the **New Record** button in the toolbar.



- A new Committee Terms record appears. Note the record name at the top.
 - Aptify automatically fills in the Committee field and the Start Date.
3. In the **Name** field enter **2015 XYZ Committee Term**.
 - Most Prompted Views use **Begins With** as an Operator - it is much easier to query Terms if they contain the beginning year at the start of the name.
 4. In the **Director** field, enter ID #01 (**Aiesha Baldwin**)
 5. Enter the **Start Date** as [**Eleven months prior to today's date**].
 6. Enter the **End Date** as [**One month in the future from today's date**].

7. Click **Save and Close**. A term record must be saved before members can be added.

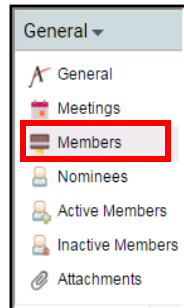
Note: If checked, **Allow Duplicate Members** will enable users to be added a second time if dropped from Term or enable users to be listed under multiple roles.

Adding Members to Committees

Members can be added to a term in three ways: from a Terms Record, a view or a Persons record.

Adding Members from the Committee record

1. From the Terms Record, click the **General** tab; select **Members**.



2. Click **New** to create a new terms Member record.
3. In the **Member** field, enter ID #01 (**Aiesha Baldwin**)
4. In the **Title** field, enter **Director**. (Optional - possibly Designation)
5. In the **Role** field, enter and select **Chair**.
6. Click to select the checkbox, **Voting Member**.
7. Click **OK**.

 A screenshot of a 'Members record' form. The form contains the following fields and options:

- Committee Term: 2015 XYZ Committee Term
- Member: Baldwin, Aiesha/Danube Partners
- Rank: 0
- Title: Director
- Role: Chair
- Voting Member
- Region: (empty)
- Start Date: 01/30/2014
- End Date: 01/29/2015
- Goals: (empty text area)
- Accomplishments: (empty text area)
- Summary: (empty text area)

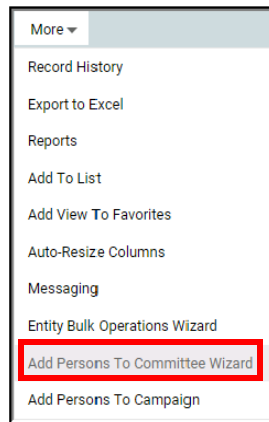
 At the bottom of the form are three buttons: 'OK AND NEW', 'OK', and 'CANCEL'.

8. Observe the line item under the **Members** section for Aiesha Baldwin.

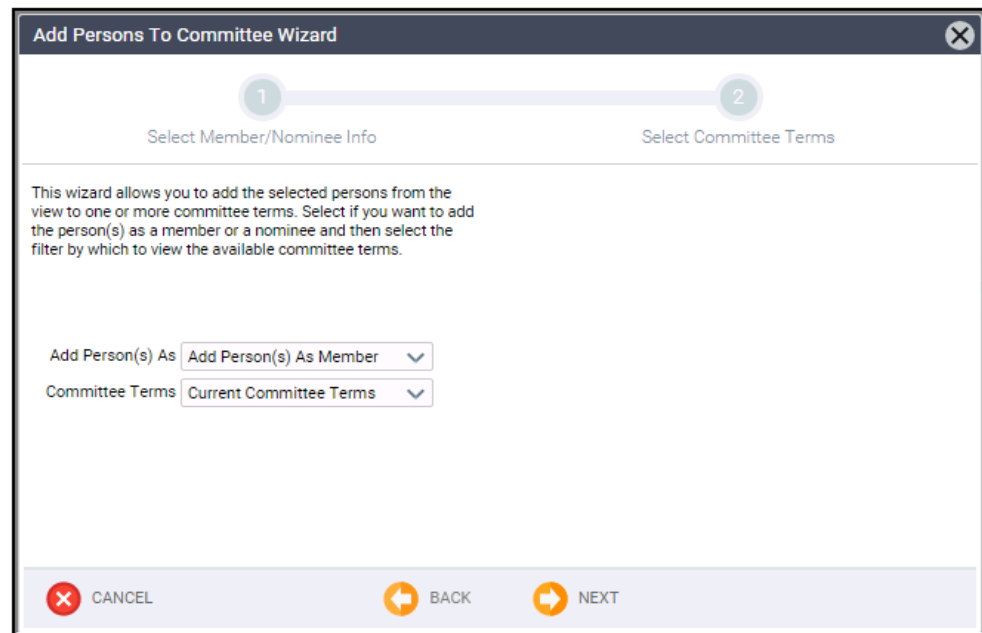
Adding Members from a View

Using a view of persons, one or more members may be added to a committee term.

1. Click to run the **San Francisco Student Members** view from Favorites.
2. Click the **More** dropdown; select **Add Persons to Committees Wizard**



3. The wizard guides the user to add selected person(s) as a member or nominee, and to which terms. Click the drop-down arrows to see the choices, but leave as is.



4. Click **Next**.

5. Select the left checkbox for the **XYZ** committee name.
6. Click to select the checkbox for **Voting** member. If that field is not showing, expand the wizard screen to show the far right side.

SELECTED	ID	COMMITTEE	TERMS
<input checked="" type="checkbox"/>	49	XYZ Committee I	2015 XYZ Committee

7. Click **Finish**.

Adding Members from a Persons Record

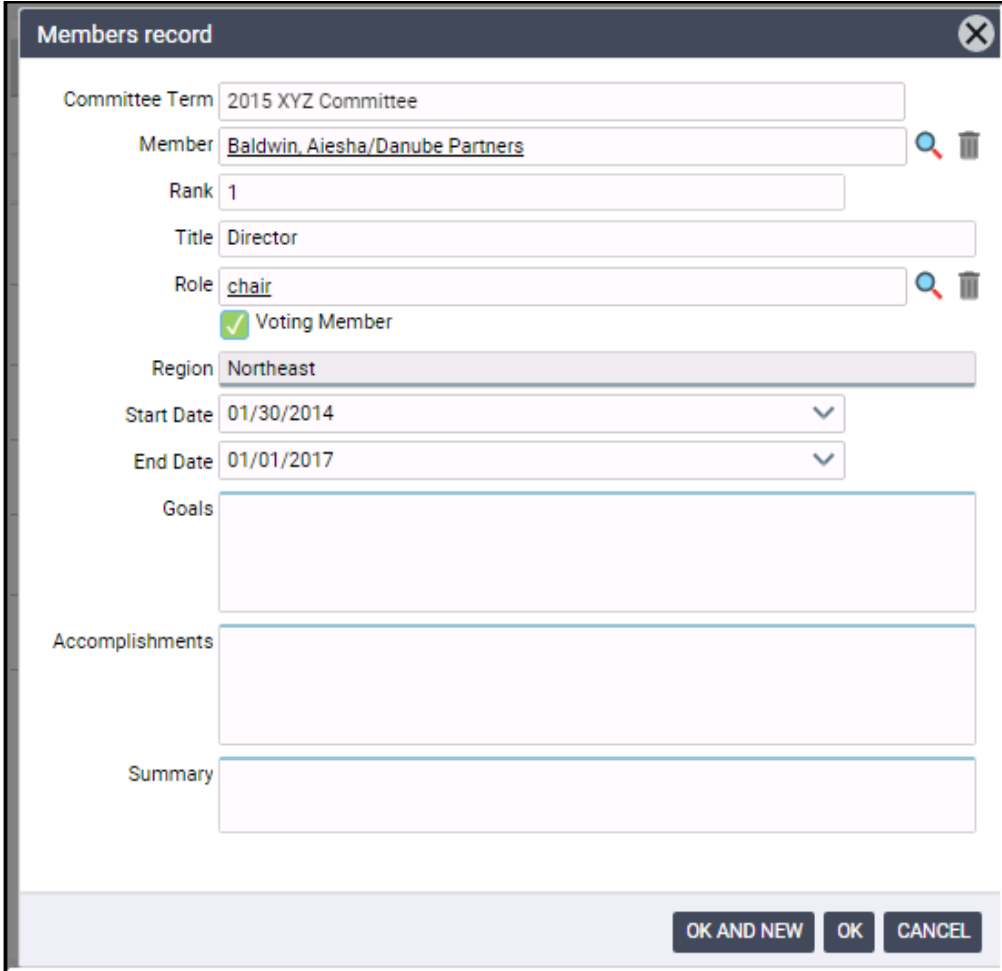
1. Open a **Persons** record off of Recently Used records (one not on the term already).
2. Under the **Actions** menu, click the **View Full Record** button.
3. Click the **Contact** dropdown; select the **Committees** section.
4. Click the **Add to Committees** button.

ID	NAME	VOTING MEMBER
566	2000 Audit Committee	<input type="checkbox"/>
567	1999 Audit Committee	<input type="checkbox"/>
568	2001 Audit Committee	<input type="checkbox"/>

5. The following screen displays the **Add Persons to Committee Wizard**.
6. Click **Next**.
7. Click to select the checkbox left **XYZ Committee**, as well as
8. Click **Voting Member**.
9. Click **Finish**.

Editing Member Information

1. Click on the **Committee Management** Application
2. From the Dashboard - select the **2015 XYZ Committee Term**
3. Click on the General - **Members** section
4. Double click on **Aiesha Baldwin**'s record
5. In the **Rank** field, enter **1**.
6. In the **Region** field, enter **Northeast**.



The screenshot shows a 'Members record' form with the following fields and values:

- Committee Term: 2015 XYZ Committee
- Member: Baldwin, Aiesha/Danube Partners
- Rank: 1
- Title: Director
- Role: chair
- Voting Member
- Region: Northeast
- Start Date: 01/30/2014
- End Date: 01/01/2017
- Goals: (empty text area)
- Accomplishments: (empty text area)
- Summary: (empty text area)

Buttons at the bottom: OK AND NEW, OK, CANCEL

Note: Users can also create Nominees under the Nominees tab of a Term. This enables users to track nominations either emailed/called in or submitted via the web site by members. Users can then use the **Add Persons To Committee Wizard** to add the selected Members from among a view of Nominees to a Term.

Committee Views

1. From the **Quick Search**, enter and find the **Find Term Members (BASE VIEW)** view.
2. Enter **2015** in the **Term** prompt.
3. Observe the **Results**.
 - As Base View - results show fields from the Persons, Committee, Terms, and Member services.

Find Term Members (BASE VIEW)

Term: Last Name, First Name: Company:

<input type="checkbox"/>	NAME/COMPANY	COMMITTEE NAME	TERM	TERM MEMBER STAR...	TERM MEMBER END ...	TERM ...
<input type="checkbox"/>	Baldwin, Aiesha/Danube Partners	XYZ Committee	2015 XYZ Committee Term	01/30/2014	01/29/2015	
<input type="checkbox"/>	Jackson, Wainwright/Let's Stop N Shop	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member
<input type="checkbox"/>	Byrd, Quillan/Cottonwood Taping Systems	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member
<input type="checkbox"/>	Walker, Andrew/Bechtel Group, Inc.	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member
<input type="checkbox"/>	Lowe, Mason/Let's Stop N Shop	XYZ Committee I	2015 XYZ Committee	01/30/2014	01/01/2017	Member

4. From the **Quick Search**, enter and find the **Find Nominees (BASE VIEW)** view.
5. Enter **2014** in the **Term Name** field.
6. Observe the **Results**.
 - As Base View - results show fields from the Persons, Committee Terms, and Member services

Find Nominees (BASE VIEW)

Term Name: Committee Name: Nominee:

<input type="checkbox"/>	ID	NAME	MEMBER
<input type="checkbox"/>	47	2014 Standards Committee	Pintaro, Jessica/Ottoman
<input type="checkbox"/>	47	2014 Standards Committee	Harris, Madison/Frankenversand
<input type="checkbox"/>	47	2014 Standards Committee	Miller, Nadia/Franchi S.p.A.
<input type="checkbox"/>	47	2014 Standards Committee	Wade, Pamela/Galería del gastrónomo
<input type="checkbox"/>	47	2014 Standards Committee	Ericson, Querida/Godos Cocina Típica

Chapter 9

Products & Inventory

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Objective

In this lab, you will add products to the Aptify system. This includes:

- Understanding products
- Creating a new products record
- Adding prices to a product
- Creating a Related Product Prompt
- Creating an Inventory Location
- Creating a Product Inventory Ledger
- Creating a Product Inventory Ledger Entry
- Creating a Kit Product

Understanding Products

Product Types

Aptify groups similar products together based on required functionality. Basic products use a **General** type designation. **Extended** products use a name-specific designation.

All Products fit into these 6 General and Extended Types:

General

Publication

Meeting

Expo

Housing

Class

Publication, Meeting, Expo, and Housing are all Extended Products Types. When a user specifies a product type other than General on a Products record, Aptify automatically adds an extended product tab to the Products form. For example, when the Publication product type is selected, a Publications tab appears on the Products record. Extended order detail forms are defined for products with product types of Expos, Meetings, and Housing.

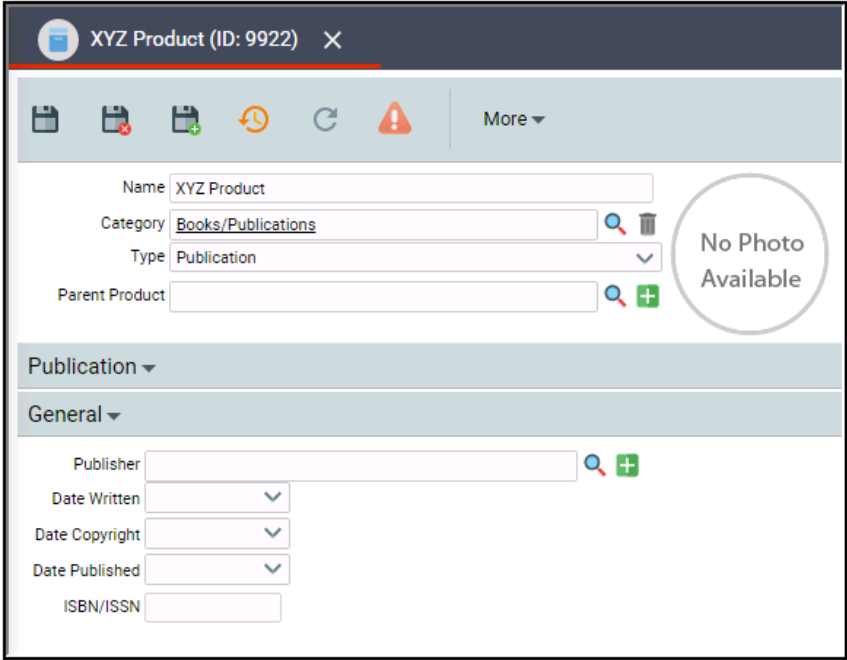
Product Categories

Product Categories group similar products together and are configured by administrators. Users can create a product hierarchy of categories and sub-categories. General Ledger (GL) Accounts are also linked to new products in a category and auto-generated on a product when that Category is designated. This enables a simplified product setup.

Aptify's sample database includes several predefined product categories. An organization should create new product categories as necessary based on its particular product/service mix.

Creating a New Products Record

1. Select the **Product Maintenance** Application and note the dashboard buttons and views.
2. Click the **New Products Record** button on the dashboard. .
3. In the **Name** field, enter **XYZ Product** (where *XYZ* are your initials).
4. In the **Category** field, enter **Publications**. Press **Tab**.
 - Note that the Publications Type was automatically entered for the user. Aptify will automatically set the type of product as it relates to the category selected.
 - A **Publication** tab is now active



The screenshot displays the 'XYZ Product (ID: 9922)' record in the Aptify system. The interface includes a top navigation bar with a 'More' dropdown and a toolbar with icons for save, delete, refresh, and warning. The main form contains the following fields:

- Name:** XYZ Product
- Category:** Books/Publications
- Type:** Publication
- Parent Product:** (empty)
- Publication:** (active tab)
- General:**
 - Publisher:** (empty)
 - Date Written:** (dropdown)
 - Date Copyright:** (dropdown)
 - Date Published:** (dropdown)
 - ISBN/ISSN:** (empty)

A circular placeholder on the right indicates 'No Photo Available'.

5. Click **Save**.
 - Once a record is saved, other tabs are available.

GL Accounts Tab

1. Select **Accounting > GL Accounts** from the **Product** section drop-down.
2. Observe the six **GL Accounts** listed.
 - These accounts flowed down from the Product Category that was initially saved.

Web enabling

1. Click **Publications** to select **Web**, select **General**.
2. Note the options available to make the product available via a website. **Web Enabled** must be checked, then the product description, images, etc. can be specified.
3. Click **Web>General** to select **Long Description** and **Download Details** for further information that can be configured.

Inventory Tab

1. Under the Publications drop-down, select the **Inventory** tab.
2. In the **Require Inventory** box, click to check active.
3. In the **Re-Order Qty.** field, enter **100**.
4. In the **Minimum Stock** field, enter **500**.
5. Click **Save**.

The screenshot displays a software interface with two tabs: **Inventory** and **General**.

Inventory Tab:

- Quantity On Hand: 0
- Quantity Shipped: 0
- Quantity Reserved: 0
- Quantity On Order: 0

General Tab:

- Re-Order Qty: 100
- Ave. Lead Time: 0
- Minimum Stock: 500
- Notification Employee: [Search icon] [Add icon]
- Default Inv. Location: [Search icon] [Add icon]
- Require Inventory
- Calculate COGS
- Cost Method: Average (dropdown)
- Include In Shipping Calc.
- Drop Ship
- Make Internally
- Requires Fulfillment
- Allow Backorders

Note: Checking **Requires Fulfillment** prevents the current product from being auto-shipped at the time of purchase whether by a phone or web based order.

If a user desires a product to be delayed between the time it is ordered and the time it is shipped, perhaps due to a review cycle or inventory concerns, check this box.

Understanding Pricing

Users can specify multiple prices to target specific audiences:

Member-based pricing

Can specify different prices for members and non-members

Date-based pricing (Early Bird specials)

Set prices based on Order date

Quantity Discounts

Provide discounted prices if customer orders specified number of units or above

Combination of multiple pricing features

For example, an early bird special for members only

Multiple Currency

The Order Entry System automatically selects the correct price based on membership of the persons/companies record, order date, and/or order quantity.

Pricing Can be set at three different levels:

- Organization
- Employee
- Product

Setting permissions on the **Organization level** gives all of its employees the ability to override the configured price(s), select a price from a list of available prices, or allow the product to be given to a customer/member for free (price = \$0). Organization-level permissions take precedence over the Employee and Product permissions settings. (Once a user has enabled these permissions for the entire organization, all users will have these abilities regardless of the individual Employee and Product settings.)

If a user wants to set permissions on an **Employee-by-Employee basis**, enable **Order Entry Permissions** only for specific Employees and leave these settings disabled for the Organizations and Products records.

If a user wants to set permissions on a **Product-by-Product basis**, enable **Order Entry Permissions** only for specific products and leave these settings disabled for the Organizations and Employees records.

A user can also utilize the **Employees and Products** permission sets in conjunction (the Employee setting takes precedence over the Product setting). For example, a user can enable these Permissions on Employees records for managers so they can override the price of any product (while leaving these Permissions disabled for non-managers). Then, a user could enable these permissions for specific products whose prices non-managers can override and leave them disabled for products that non-managers cannot override.

Adding Prices to a Product

Each product can support multiple prices based on membership type, order quantity, and/or other order characteristics (such as those identified by a filter rule). Then, when taking an order, Aptify automatically applies correct price based upon the characteristics of the order.

Follow these steps to setup pricing for the product created in Exercise 1:

1. On your **XYZ Product** record, select the **Prices>Pricing Table** tab.
2. Click **New** to open a new **Prices** record.
3. In the **Name** field, enter **Member**.
4. In the **Price** field, enter **\$100.00**
5. From the **Member Type** drop-down list, select **Member** (if not already selected).
6. From the **Type** drop-down list, select **Base Price**.

The screenshot shows the 'Prices record' dialog box with the following fields and values:

- Name: Member
- Price: \$100.00
- Includes Tax:
- Default:
- Member Type: Member
- Include Sub-Member Types:
- Type: Base Price (highlighted with a red box)
- % of Base: 0
- Start Date: [empty]
- End Date: [empty]
- Minimum Quantity: 0
- Maximum Quantity: 0
- Pricing Rule: [empty]
- Currency Type: US Dollar
- Derived From Currency: [empty]
- Description: [empty]

Buttons at the bottom: OK AND NEW, OK, CANCEL

7. Click the **OK** button.

8. Note how the **Member Price** record appears under the **Prices > Pricing Table** section.

Prices > Pricing Table		
NAME	PRICE	
Member	\$100.00	<input type="checkbox"/>

9. Click the **New** button to create another price record.
10. In the **Name** field, enter **Non-Member**.
11. In the **Price** field, enter **\$0.00**.
12. From the **Member Type** drop-down list, select **Non-Member** (if not already selected).
13. From the **Type** drop-down list, select **Percent of Base Price**.
14. In the **% of Base** field, enter **200**.

Prices record

General

Name: Non-Member

Price: \$200.00 Includes Tax Default

Member Type: Non-Member

Include Sub-Member Types

Type: Percent Of Base % of Base: 200

Start Date: End Date:

Minimum Quantity: 0

Maximum Quantity: 0

Pricing Rule:

Currency Type: US Dollar

Derived From Currency:

Description:

OK AND NEW OK CANCEL

15. Click **OK** to save.
- **Note:** the two price records are now linked to the Product record.
 - By choosing **Base** price for the Member and **Percent of Base** for the Non-Member the user can control future price changes by only editing the Base Price.

Note: **Filter Rule** records can be set up to cross reference specific areas/services to set a particular price. Discounts can be tied to the amount of **Continuing Education Credits** a **Bill To Persons** has or to number of **Classes** taken in a particular year.

Creating a Related Product Prompt

A Related Product is an additional product that is leveraged as an accessory or a cross-sell product. The related product prompt will appear as pop-up in the **E-Business web site** when an order is placed **online**.

Example: when someone is registering for a class, they might be interested in purchasing a discounted textbook.

1. From your **XYZ Product** record, select the **Details >Related Products** section.
2. Open a new **Related Products** record.
3. In the **Related Product** hyperlink field, enter **Financial Planning**
4. In the **Product Relationship Type** field, enter **Accessory**.
5. In the **Start Date** field, enter **today's date** (Leave the **End Date** blank).
6. In the **Prompt Text** field, enter **Financial Planning available**.

The screenshot shows a 'Related Products record' dialog box with the following fields and values:

- Related Product:** Financial Planning
- Product Relationship Type:** Accessory
- Active:**
- Start Date:** 01/01/2016
- End Date:** (blank)
- Auto Prompt Operator:**
- Prompt Text:** Financial Planning Available.
- Web Prompt:**
- Web Prompt Text:** (blank)

Buttons at the bottom: OK AND NEW, OK, CANCEL

7. Click **OK**.
 - When an order is taken for **XYZ Product** later in this class, a pop-up dialog box will appear informing that there are related products available.
8. **Save** and **Close** the **XYZ Product** record.

Inventory Objectives

When users check the **Require Inventory** button under the **Products, Inventory** tab, they **MUST** set up (or no orders can be taken) and understand:

- Creating an **Inventory Location (IL)**
- Creating a **Product Inventory Ledger (PIL)**
- Creating a **Product Inventory Ledger Entry (PILE)**

How Aptify tracks inventory

- Optional on a per-product basis
- Membership Dues usually do not have inventory but can, if the number of available memberships is limited
- Inventory is stored in multiple warehouses and transferred between as necessary
- Inventory records are configured by the organization's Accounting department

3 Services related to Inventory Management:

Inventory Locations (ILs)

- Inventory Location is the location where the physical product(s) is housed; can be a storage bin, pallet location in a warehouse, closet, cube, etc.
- For meetings it would be a block of seats available in the meeting room - BUT Inventory is auto-generated by the Meeting copy wizard and should NOT be set up with this method.

Product Inventory Ledger (PILs)

- Product Inventory Ledgers are the ledgers for each product that the Inventory Location contains. These Ledgers are used to track the inventory transactions created in the PILES.
- Product inventory ledgers (PIL) are records that track inventory activity for a particular product. Every product must have its own product inventory ledger. Ledgers are only created once at the creation of a product.

Product Inventory Ledger Entries (PILEs)

- Product inventory ledger entries are the (PILEs) are the individual inventory transactions that track inventory in/out of the ledger there are FOUR types:

Purchase: for adding new inventory

Transfer: for moving inventory between locations

Adjustment: for making corrections or for returning inventory

Batch: Removes shipped units from inventory

- Automatically generated during batching process
- Each PILE is tied to a PIL - a saved PILE cannot be modified

Creating an Inventory Location

1. Click on the **Product Maintenance** dashboard.
2. Click on the **New Inventory Location** button from the dashboard button bar.
3. In the **Name** field, enter **XYZ Warehouse** (*XYZ = your initials*).
4. In the **Organization** field, enter **Sampco Holdings**.
5. Leave **Type** set to **Bin** and **Status** set to **Active**.
6. In the **Max Units** field, enter **5000**.
7. In the **Replenish Level** field, enter **500**.
8. In the **Replenish Quantity** field, enter **500**.
9. In the **Manager** field, enter **John Samuels** (this links to the Employees service).
10. Click **Save**.

The screenshot shows the 'General' tab of a form for creating an inventory location. The fields and their values are as follows:

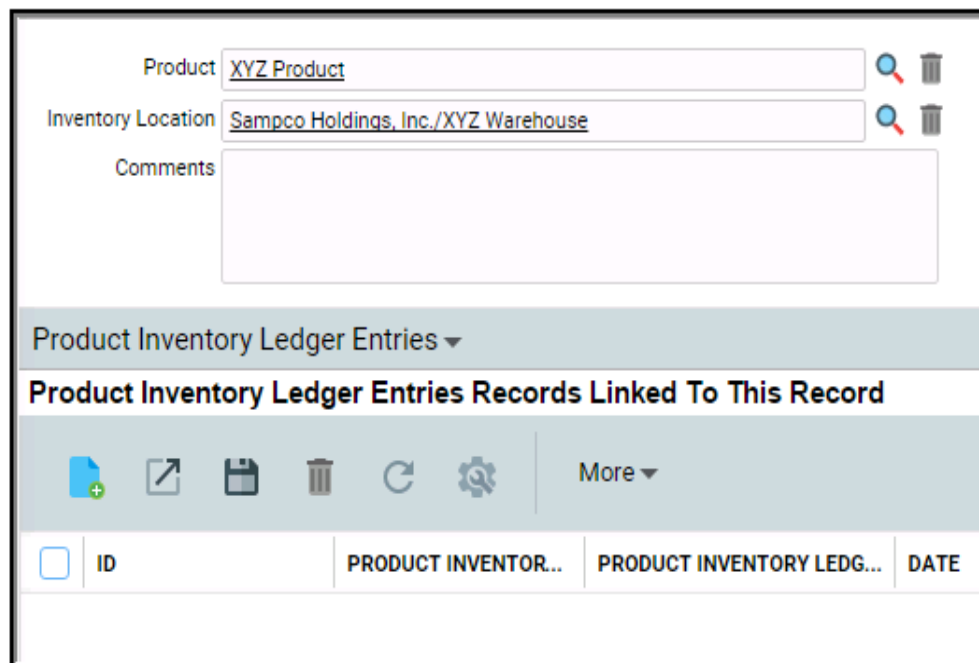
Field	Value
Name	XYZ Warehouse
Description	
Organization	Sampco Holdings, Inc.
Type	Bin
Status	Active
Max Units	5000
Weight Units	Pounds
Replenish Level	500
Max Weight	0
Replenish Quantity	500
Linear Units	Inches
Height	0
Width	0
Depth	0
Allow Direct Fulfillment	<input checked="" type="checkbox"/>
Replenish Source	
Manager	John Samuels

Creating a Product Inventory Ledger

A Product Inventory Ledger (PIL) is created to manage and track inventory. Each product for which you track inventory must have a Product Inventory Ledger assigned to it.

1. On the Inventory Locations record, click the **General** drop-down.
2. Select **Product Inventory Ledger**.
3. On the far left, click the **New** record button (creates a new Product Inventory Ledger record).
 - Aptify fills in the Inventory Location field automatically since this record was opened from an Inventory Location record. A new Product Inventory Ledger record can be opened directly from the Product Inventory Ledger service.
4. In the **Product** field, enter **XYZ Product**.
5. Click **Save**.

Note that the Product Inventory Ledger Entries tab is now active:



The screenshot displays the 'Product Inventory Ledger' form. At the top, there are three input fields: 'Product' with the value 'XYZ Product', 'Inventory Location' with the value 'Sampco Holdings, Inc./XYZ Warehouse', and 'Comments' which is empty. Below these fields is a section titled 'Product Inventory Ledger Entries' with a dropdown arrow. Underneath this is a sub-section titled 'Product Inventory Ledger Entries Records Linked To This Record'. This section contains a toolbar with icons for adding, editing, deleting, refreshing, and settings, along with a 'More' dropdown. Below the toolbar is a table with the following columns: 'ID', 'PRODUCT INVENTOR...', 'PRODUCT INVENTORY LEDG...', and 'DATE'. The table is currently empty.

Creating a Product Inventory Ledger Entry

Use Product Inventory Ledger Entries (PILEs) to add, transfer, or remove inventory from different locations.

1. On the Product Inventory Ledger record created previously, select the **Product Inventory Ledger Entries Details** drop-down.
2. Select **Product Inventory Ledger Entries**.
3. Click the **New** record button.
 - Aptify auto-fills the Product Inventory Ledger field since this record was opened from a Product Inventory Ledger record. A new Product Inventory Ledger Entries records can be opened directly from the Product Inventory Ledger Entries service.
4. In the **Description** field, enter **Add 1000 units**.
5. In the **Quantity** field, enter **1000**.
6. In the **Unit Cost** field, enter **\$20.00**.

The screenshot shows a form titled "General" with a dropdown arrow. The form contains the following fields and values:

Product Inv. Ledger	XYZ Product-XYZ Warehouse		
Original PILE			
Description	Add 1000 Units		
Date	01/19/2016	Type	Purchase
Quantity	1000		
Unit Cost	\$20.00	Currency Type	US Dollar
Quantity Balance	0	Entry Qty. Balance	0

7. Click **Save and Close** - For the **PILE**, **PIL**, and the **IL**.

8. Using Quick Search, find and open your **XYZ Product** record.
9. Click to open the **Inventory** section of the record.
10. Notice that the **Quantity On Hand** field reads **1000**.

The screenshot displays a product record for 'XYZ Product'. The 'Inventory' section is expanded, showing the following values:

- Quantity On Hand: 1000
- Quantity Shipped: 0
- Quantity Reserved: 0
- Quantity On Order: 0

The 'General' section contains the following information:

- Re-Order Qty: 100
- Ave. Lead Time: 0
- Minimum Stock: 500
- Notification Employee: (empty)
- Default Inv. Location: (empty)
- Require Inventory:
- Calculate COGS:
- Cost Method: Average
- Include In Shipping Calc.:
- Drop Ship:
- Make Internally:
- Requires Fulfillment:
- Allow Backorders:

Additional fields at the top include Name (XYZ Product), Category (Books/Publications), Type (Publication), and Parent Product (empty). A 'No Photo Available' message is displayed on the right side of the record.

General and Prerequisites Sub-tabs

Two additional areas that are useful for product configuration are the **General** and **Prerequisites** tabs found under the **Details** tab.

Details - General Tab

The **Details - General** tab contains additional information that can be stored, linked, and configured for the product - the most useful of which concerns **Order Lines** generated by purchasing a product.

1. Click the **Details > General** section.
2. Select the **Open Order Line on Add** checkbox.
 - Checking this box automatically opens up the Order Line on an Order form when **Add** is clicked (the product is added to order).
 - Feature useful when additional information required on an order:
 - Separate shipping info
 - Booth configuration and/or registrant information
 - Class or Meeting registrant information
3. Select the **Allow Description Override** checkbox.
 - This feature enables users to type over the Product Description that is auto-added when a product is ordered.
 - Useful if particular instructions are needed regarding a particular product on a specific order.

Details > General

Topic

Code

Organization

Committee

Prev. Version

Base Product

Chapter Assignment Rule

Order Line Description

Order Line Fields

Open Order Line on Add

Allow Description Override

Prerequisites Tab

Prerequisites enables users to set up requirements for a product, for example, clients will only be able to order a product if they meet the prerequisites specified under this tab.

This is most widely used in Aptify for **Classes** under the **Education** module. It is used to set up class curriculum order for the sequencing of classes and is the **ONLY** place in Aptify this can be set up in non-direct coding process.

1. Click the **Prerequisites** tab.
2. Select the **Require Prerequisites** check box.
3. Observe the **Prerequisites Failure Message** - these boxes communicate the exact failure message that will display as a result of a client ordering the product that does **NOT** meet the prerequisites.
 - Failure messages are linked via **Aptify Culture Strings** which are created by **Administrators**. These can easily be created to reflect the desired message.
4. Click the **Prerequisites Failure Message** Add button (right side) to open a blank record.
5. In the **Name** and **Base String** fields, enter **Purchase must be from the State of _____ to purchase**. (In the blank, fill the state of the Persons record created earlier).
6. In the **Category** field, enter products, select **Products**.
7. Click **Save and Close**.
8. Click in the **Service** Column under the **Filter Rules** area.
9. From the **Service** field, select **Ship To Person**.
10. In the **Field** field, enter **State**.
11. In the **Operator** field, enter **Exactly Matches**.
12. In the **Value** field, enter the State from step 5 above.
13. **Save and Close** the **Products** record to activate this function; otherwise, uncheck the Prerequisites box and close the record without saving.

Details > Prerequisites ▾

Require Prerequisites

Prerequisites Failure Message

Web Prerequisites Failure Message

#	SERVICE	FIELD

Logic String

1

Creating a Kit Product

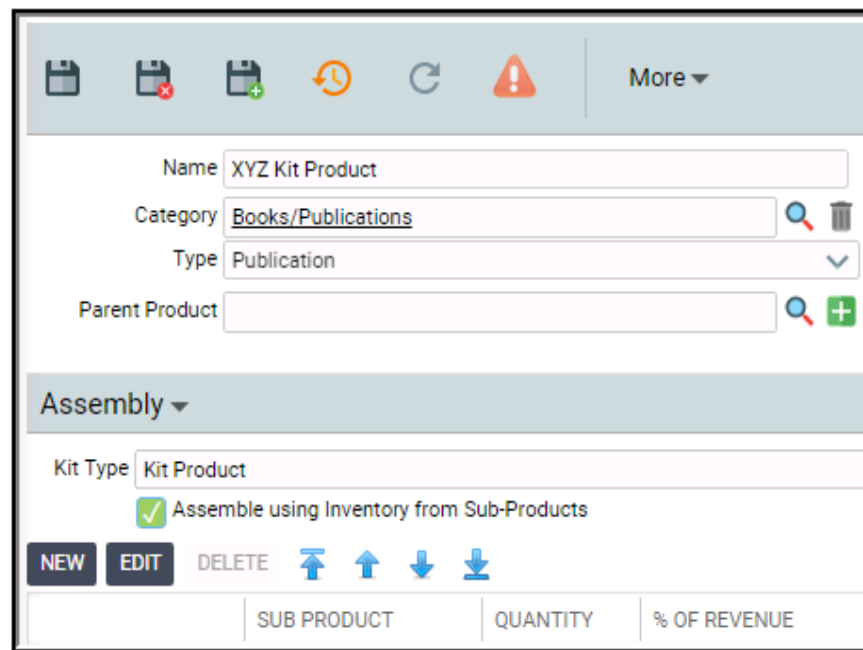
Kits are products that contain **two or more products** which are sold as a bundle.

Kits often bundle complementary products to provide customers with a price discount when compared to the cost of purchasing each product separately. Products in a kit may also be sold individually depending on the top level item setting.

1. Return to the **Product Maintenance** dashboard.
2. Click the **New Product** button.
3. In the **Name** field, enter **XYZ Kit Product** (*XYZ = your initials*).
4. In the **Category** field, enter **Books/Publications**.
 - The product **Type** should be set to **General**.
5. Click **Save**.

Assembly Tab

1. Select the **Assembly** section.
2. From the **Kit Type** drop-down list, select the **Kit Product** type.
3. Click the **Assembly Using Inventory From Sub-Products** check box.
 - Notice that the Assembly functionality is now active.



The screenshot displays the 'Product Maintenance' form with the 'Assembly' tab selected. The form fields are as follows:

- Name:** XYZ Kit Product
- Category:** Books/Publications
- Type:** Publication
- Parent Product:** (Empty)

The **Assembly** section is expanded, showing:

- Kit Type:** Kit Product
- Assemble using inventory from Sub-Products

At the bottom, there are buttons for **NEW**, **EDIT**, and **DELETE**, along with four directional arrows (up, down, left, right). Below these is a table header with columns: **SUB PRODUCT**, **QUANTITY**, and **% OF REVENUE**.

4. In the toolbar, click the **New** record button to open a **Parts** record.

5. In the **Sub Product** field, enter **XYZ Product**.
6. In the **Quantity** field, enter **1**.
7. In the **% of Revenue** field, enter **75**.

8. Click **OK**.
9. Open another new **Parts** record.
10. In the **Sub Product** field, enter **Sampco Baseball Hat**.
11. In the **Quantity** field, enter **1**. In the **% of Revenue** field, enter **25**.
12. Click **OK**.

Assembly ▾			
Kit Type <input type="text" value="Kit Product"/>			
<input checked="" type="checkbox"/> Assemble using Inventory from Sub-Products			
NEW	EDIT	DELETE	↑ ↓
	SUB PRODUCT	QUANTITY	% OF REVENUE
<input type="checkbox"/>	XYZ Product	1	75
<input type="checkbox"/>	Sampco Baseball Hat	1	25

13. Click **Save**.

Prices Tab

1. Click the Prices>**Pricing Table**. Click the **New** record button.
2. Enter **XYZ Kit Product Member Price**. Add a **Member Price** of **\$105** for each kit.
3. Click the **OK**. Click the **New** button to create a new prices record.
4. Enter a **Non-Member Price** of **\$210** for each kit. Click to select the checkbox to mark this price as the **Default**.
5. Click **OK**. Click **Save and Close** (the product record).

Product Grouping

- Setup like a Kit product. Easy way to add multiple products to an order in one operation
- Group itself is not added to an order
- Only the individual products in the group
- Products added by group can be removed from order w/out affecting other products.

Chapter 10

Order Entry

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Objective

Once Aptify products, inventory, and prices have been established, an organization's employees can take orders from customers and/or members. In this chapter, users will have the opportunity to work with the Aptify Order Entry system. This includes:

- Types of Orders
- Taking Orders
- Shipping Orders
- Creating a Back Order
- Canceling an Order

Orders Overview

The Aptify Order Entry can process multiple transactions within one order. For example, a service representative could process a new membership, register that individual for a meeting, and sell a book all on one order with one invoice.

In Aptify, all income-generating items are classified as products. This could include booth space at expos, meeting registrations, subscriptions and membership dues, a mug or a hat. Aptify tracks extended information associated with these transactions within the Product Service/Order Entry system. Information such as the venue for a meeting, the registrants name vs. the payees name, the electric or water needs for a booth setup, etc. can all be included within an order line.

The Aptify Order Entry system also provides full-feature order and payment processing for the following features and capabilities:

- **Aptify automatically pulls billing and shipping address information** from customer or company records when Orders are shipped, ensuring accuracy and saving order processing time.
- **Pricing information is automatically pulled from a Products record.** Each product can be configured to have multiple pricing options, which can be associated with different marketing campaigns/member/customer types. The Order Entry system has logic that automatically selects the best price each customer or member is eligible for, and enables price overrides with appropriate permissions.
- **Aptify tracks deferred income** and automatically generates scheduled transactions over a given time period to recognize the income as it is earned. Income from certain items, such as membership dues and subscription orders, is earned over time and therefore should not be entirely recognized at the time of the order.
- **The Order Entry system automatically creates back orders** for products that are not currently in stock. The shipping status for regular and back-ordered items is maintained separately so that partial orders can be shipped and invoiced.

Ordering a Product

This section provides hands-on experience ordering a product and understanding the three distinct areas of the Order form: **Addressing**, **Order Lines**, and **Payments**. This example involves ordering a product from a Persons record - Orders could also be processed using:

- E-Business (Aptify's default web site)
- New Order wizard
- Companies record

Addressing

1. Using Quick Search or Recently Used Records - Open up your **Persons** record.
 - The record created in Chapter 3
2. From the **Actions** menu - select the **Create Order** button.
3. New **Orders** record displays. Aptify automatically fills in fields, including:
 - The **Ship To** information (Name, Company, Address, etc.) s
 - The **Date** field with today's date
4. Click the **Additional Addresses** button (middle screen - small icon).
 - Clicking this button displays a drop-down list that contains **ALL** selectable addresses associated with the Person and the Company.
5. Select **Ship To Home Address** to use the address added to the Persons record's Addresses tab in a previous exercise.
 - Ship To address information changes to the Home address. the same address information added to the Ship To section is added to the Bill To section.
6. Users can specify different **Bill To** information by removing the check mark from the **Billing Same As Shipping** box and editign the Bill To information.

The screenshot shows the 'New Orders Record' interface. The main form is titled 'Order Entry - Danube Partners'. It is divided into several sections:

- Customer:** Includes fields for Order Date (01/19/2016), Order Party (Company), Ship To (Baldwin, Alesha/Danube Partners), Ship To Company (Danube Partners), and a checked 'Billing Same as Shipping' box. Below this are fields for Bill To (Baldwin, Alesha/Danube Partners) and Bill To Company (Danube Partners).
- Order Addresses:** Contains a 'Ship To Address' dropdown, three address lines (Line 1: 910 Southwest Union Avenue, Line 2: , Line 3:), City, State ZIP (Palo Alto, CA, 94301), County (Santa Clara), and Country (United States). There is also a 'Bad Address' checkbox.
- Other Fields:** Customer Type (Corporate Member/Member), Campaign, Ship Type (U.S. Mail), and Order Source (Walk-In).

A red circle highlights a small icon with a dropdown arrow, located next to the 'Ship To' field, which is the 'Additional Addresses' button mentioned in the text.

Order Lines

- In the **Find Products** field, enter your **XYZ Product**, and press the **Tab** key.
 - If more than one product - double click to select, otherwise field will auto-fill.
- The **Quantity** field defaults to **1**. (Editable if needed)
- Click the **Add** button (right of Quantity).
 - An Order line is added to the form for 1 unit of the **XYZ Product**.

Description	Quantity	Price	Discount	Extended
XYZ Product (ID: 9922)	1	\$100.00	0.00 %	\$100.00

- Note the options far right to **Edit**, **Open** and **Delete** the order line.
- Edit enables the **Description**, **Quantity**, **Price**, and **Discount (%)** of the Order Line to be changed **BUT** only **IF** the user has permissions to do granted on their Employees record.
- Click on the **Open Order Lines** button.
- The **General** area enables additional information to be tracked for this order line.

- Click on the **General - Ship To** Section.
- Ship to area enables linking of separate shipping addresses particular to this order line.

Payments

1. Click **Payment Type** drop-down, select **Visa**.
2. In the **CC Account #** field, enter (for Visa: 4 followed by 15 more digits).
3. In the **CC Exp. Date** field, enter [**one year from today's date**].
 - Outside of training a CSC number would be needed.
 - CC Auth Code is a tokenized CC Number feed received from the Database's designated Authorization Vendor (PayPal or similar).
4. Select the **Save for Future Use** check box; this enables reuse of the CC on subsequent orders for the Person or Company without having to re-enter.

Note: Aptify does **NOT** store CC information. On the training server, users can enter any value in the Acct # field since it is not configured to validate credit card numbers through an authorized vendor. On a Production system, users would only use valid credit card numbers provided by a customer/member.

5. Note **Order Status** Field defaults to **Taken**.

The screenshot displays the 'Payment & Summary' form. At the top right, it shows 'Total: \$100.00' and 'Balance: \$100.00'. The form contains several fields and sections:

- Order Type:** Regular (dropdown)
- Order Status:** Taken (dropdown)
- Ship Partial:** (checkbox)
- Payment Type:** Visa (dropdown)
- Initial Payment Amount:** \$100.00 (text field)
- CC Account #:** 49586732456786456 (text field)
- Cash Control:** (text field with search icon)
- CC Expiry Date:** 02/20/2020 (dropdown)
- CSC:** (text field)
- Payment Schedule Type:** None (dropdown)
- CC Auth Code:** (text field)
- Currency Type:** US Dollar (dropdown)
- CC Auth Type:** NA (dropdown)
- Order Level:** Regular (dropdown)
- Save For Future Use:** Checked checkbox, with a dropdown menu showing 'Person' and 'Company'.
- Order Totals:**
 - Sub-Total: \$100.00
 - Shipping: \$0.00
 - Handling: \$0.00
 - Tax: \$0.00
 - Total: \$100.00
 - Balance: \$100.00

6. Click **Save**.
 - The Order is now active
 - The Credit Card is validated
7. Click on the **Order Status** dropdown - Select **Shipped**.
 - Accounting is initiated
 - Credit Card is billed.
8. Close the **Orders** record.
9. Open the **Product Maintenance Dashboard**, view of **Today's Orders**, note the new order record.

Creating a Multi-Line Order

In this exercise users will enter an order by using the **New Order Wizard**. The New Order Wizard should be the standard method for end users to enter a customer request handled over the phone or in person. It is important to note that ANY order processed using the wizard will only be given a status of **Taken**. Users will have to mark orders as **Shipped** in a separate function.

1. From the Home dashboard click on the **New Order Wizard** button.
2. In the **Ship To** field, enter your **Persons** name, and select.

3. Click **Next**.
4. In the **Find Product** box, enter **16** and select the **Sampco Glass**.
5. Click the **Add** button.
 - The 16 oz. shot glass is added as an order line
6. In the **Find Product** box, enter **Arm**.
7. Select the **Arm Chair**.
8. Click the **Add** button.

Find Product...	Quantity	Qty Avail:	ADD	CLEAR SEARCH	DELETE ALL
16oz Sampco Shot Glass (ID: 33)	1				
Arm Chair (ID: 48)	1				

9. Click **Next**.
10. Select the **Saved Payments** icon (\$ sign) next to the **Payments Type** drop-down.
11. Float the cursor over the **Persons** selection.
12. Select the **Credit Card** information that displays to the right.

The screenshot shows the 'New Order Wizard' window at step 3, 'Enter Initial Payment'. The progress bar at the top indicates that 'Specify Customer Info' and 'Add Products' are completed, while 'Enter Initial Payment' is the current step. The form contains the following fields and controls:

- Payment Type:** A dropdown menu set to 'Visa' with a currency selector set to '\$'.
- Total:** A text box displaying '\$266.00'.
- CC Partial:** A text box containing '4xxxxxxxxxxx8714'.
- Initial Payment Amount:** A text box displaying '\$266.00'.
- CC Expiry Date:** A dropdown menu set to '02/20/2020' and a 'CSC' text box.
- Cash Control:** A text box with a search icon and a green plus icon.
- CC Auth Code:** An empty text box.
- Payment Schedule Type:** A dropdown menu set to 'None'.
- CC Auth Type:** A dropdown menu set to 'NA'.
- Order Level:** A dropdown menu set to 'Regular'.
- Suppress Confirmation Emails:** An unchecked checkbox.

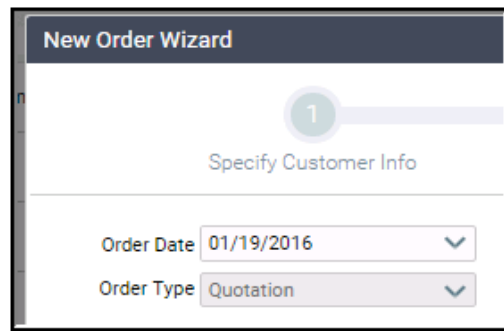
At the bottom of the window, there are four buttons: 'CANCEL' (with a red X icon), 'BACK' (with a left arrow icon), 'NEXT' (with a right arrow icon), and 'FINISH' (with a green checkmark icon).

13. Click the **Finish** button.
14. Open the **Today's Order's** view from the **Home** Dashboard.
15. **Ship** the Order.

Creating a Quotation

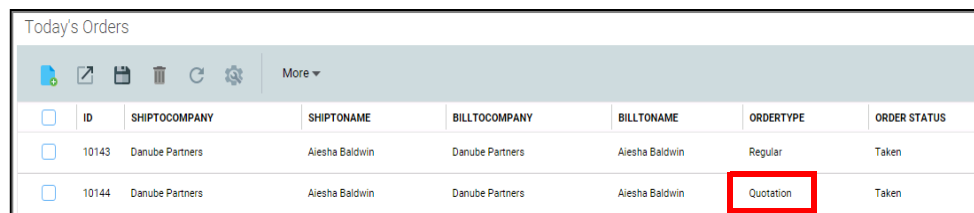
At times, members will call to find out a **Quote** without purchasing the product. Aptify allows end users to create quotations.

1. Click on the **New Order Wizard** button again.
2. From the **Order Type** drop-down menu, select **Quotation**.
3. In the **Ship To** field enter your **Persons** Last Name or ID.
4. Click **Next**.



The screenshot shows the 'New Order Wizard' interface. At the top, there is a progress indicator with the number '1' and the text 'Specify Customer Info'. Below this, there are two dropdown menus: 'Order Date' with the value '01/19/2016' and 'Order Type' with the value 'Quotation'.

5. In the **Find Product** field, enter **21** and select the **Sampco Association Journal**.
6. Click **Add**.
7. Click **Next**.
8. Click **Save**- quotations do **not** require payment information.
9. Click **No** in response to create another Order.
10. On the **Home Dashboard**, click the **refresh button** above the **Today's Orders** view.
11. Note the **Order Type** column indicating two orders **Regular** and one **Quotation**.



The screenshot shows a table titled 'Today's Orders'. The table has columns for ID, SHIPTOCOMPANY, SHIPTONAME, BILLTOCOMPANY, BILLTONAME, ORDERTYPE, and ORDER STATUS. There are two rows of data. The second row has 'Quotation' in the ORDERTYPE column, which is highlighted with a red box.

ID	SHIPTOCOMPANY	SHIPTONAME	BILLTOCOMPANY	BILLTONAME	ORDERTYPE	ORDER STATUS
10143	Danube Partners	Aiesha Baldwin	Danube Partners	Aiesha Baldwin	Regular	Taken
10144	Danube Partners	Aiesha Baldwin	Danube Partners	Aiesha Baldwin	Quotation	Taken

12. Double-click the **Quotation** entry listed last to open the **Orders** record

13. Click on the **Payment & Summary** section to open.
14. Change the **Order Type** from **Quotation** to **Regular**.
15. Change the **Order Status** from **Taken** to **Shipped**.

The screenshot shows the 'Payment & Summary' form. The 'Order Type' dropdown is set to 'Regular' and the 'Order Status' dropdown is set to 'Shipped'. Both dropdowns are highlighted with red boxes. Other fields include 'Payment Type' (Purchase Order), 'Initial Payment Amount' (\$240.00), 'PO Number', 'Terms', 'Due Date', 'Cash Control', 'Payment Schedule Type' (None), 'Currency Type' (US Dollar), and 'Order Level' (Regular). On the right, the 'Order Totals' section shows: Sub-Total \$240.00, Shipping \$0.00, Handling \$0.00, Tax \$0.00, Total \$240.00, and Balance \$240.00.

16. Select **Purchase Order** from the **Payment Type** dropdown (if not already selected).
17. Enter **34** in the **PO Number** field.
18. Click **Save and Close** at top left.
19. From the dashboard on the **My Orders Today** view, click the **Refresh** button
20. Note the **Quotation** is changed to a **Regular** Order and **Status** is **Shipped**.

Company Only Orders

Users can create an order which is placed and purchased by a company, not a specific person at the company. A “Ship To” person is not a required field in this situation.

1. Create an order from the **New Order Wizard**.
2. In the **Ship To Company** field, enter **01** for **Danube Partners**.
3. Notice that the Order form now shows a field labeled, **Order Party, Company**.
4. Order **Corporate Membership** (ID #1) from the **Add Products** screen.
5. Enter **Prepaid Check - Check Number 1234** in the Enter Initial **Payment** screen.
6. **Finish** the order.

The screenshot shows the 'New Order Wizard' interface. It is divided into two steps: 'Specify Customer Info' and 'Add Products'. In the 'Specify Customer Info' section, the 'Order Date' is set to 01/19/2016 and the 'Order Type' is Regular. The 'Ship To' field is set to 'Danube Partners', and the 'Ship To Company' field is also set to 'Danube Partners'. The 'Order Party' field is set to 'Company', and the 'Order Source' is 'Walk-In'. The 'Billing Same as Shipping' checkbox is checked, and the 'Currency Type' is 'US Dollar'. The 'Bill To' field is also set to 'Danube Partners', and the 'Customer Type' is 'Not Available'.

7. Open the Order from **My Orders Today** view on **Home** Dashboard (refresh if needed).
8. Open the **Payments & Summary** section.
9. **Ship** and **Save** the Order.
10. **Open** the **Accounting** section of the **Order** and click on the **Payments** record.
11. The **Payments** record will also indicate a **Company Only** status.

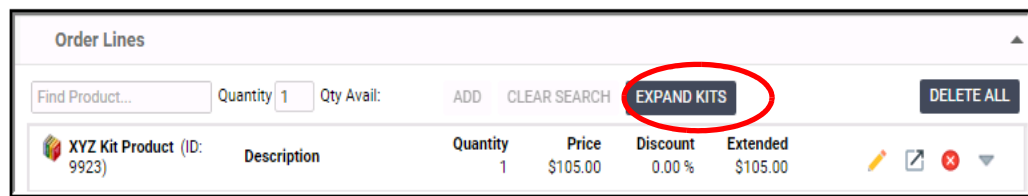
The screenshot shows the 'Payments ID: 3914' record. The 'Taken By' field is 'End User'. The 'Organization' is 'Sampco Holdings, Inc.'. The 'Person' field is 'Not Specified', and the 'Company' field is 'Danube Partners'. The 'Payment Party' is 'Company', and the 'Order Search' field is 'Order #'. The 'Payment Lines' section shows a table with the following data:

NEW	EDIT	DELETE	↑	↓	↕	ORDER	APPLIES TO	IS TAX	ORDER LINE #	AMOUNT
<input type="checkbox"/>						10145	Entire Order	<input type="checkbox"/>	0	\$1,500.00

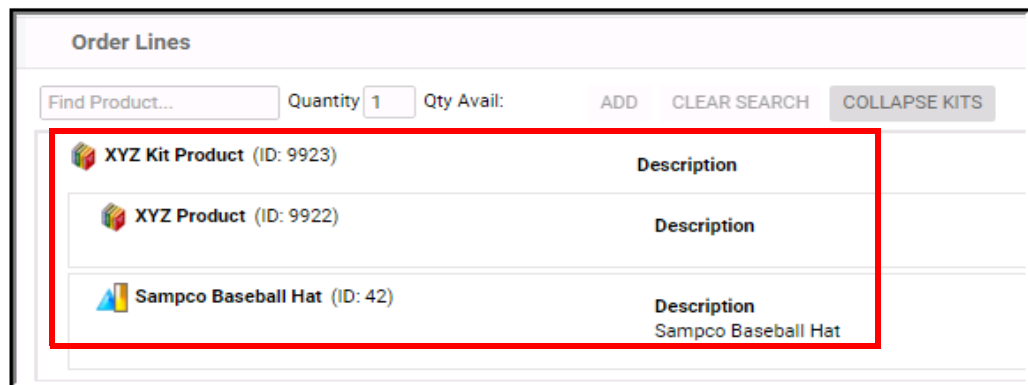
To associate a persons' name with a **Company Only Order**, the companies record contains a field called, **Billing Contact**. This field is located on the **Company** record, **Contact** section at the very bottom of the form. When a company order shipped, this is the contact to whom the order notification is sent.

Ordering a Kit Product

1. Open **Aiesha Baldwin**'s record (ID #1).
2. From the **Actions** section, select **Create Order**.
3. From the Order Lines section - **Add the XYZ Kit Product**.
 - The price of the order is the kit price and not the sum of the individual products.
4. To the right of the **Add** button, click either the **Expand Kits** button or the down arrow.



5. The components of the **Kit** product display.



6. Next to the **Payments Type** drop-down, select the **Saved Payments** icon.
7. Float the cursor over the **Persons** selection.
8. Select the **Credit Card** information that displays to the right.
9. Click Save and Close.
10. You will NOT get the option to ship.
11. Return to the **Home** dashboard.
12. Click on the Kit order you just create to **Open**.
13. Click on the **Payments and Summary** section to expand; it is contracted.
14. Select **Shipped** from the **Order Status** dropdown. Click Yes.
15. **Save and Close** the Order.

Making a Partial Payment for an Order

In some cases, a customer/member may make only a partial or installment payment at the time the order is taken.

1. Find and Open **Aiesha Baldwin**'s record from **Quick Search**.
2. From the **Actions** menu select **Create Order**.
3. Create an order line for **1** unit of your **XYZ Product**.
4. On the Purchase information screen, click to change **Payment Type** to **Pre-Paid Check** and enter a check number.
5. Change the **Initial Payment Amount** to half of the amount of the **Balance** due.

The screenshot shows the 'Payment & Summary' form with the following details:

- Order Type: Regular
- Order Status: Taken
- Payment Type: Visa
- Initial Payment Amount: \$45.00 (circled in red)
- Order Totals:
 - Sub-Total: \$100.00
 - Shipping: \$0.00
 - Handling: \$0.00
 - Tax: \$0.00
 - Total: \$100.00
 - Balance: \$55.00 (circled in red)

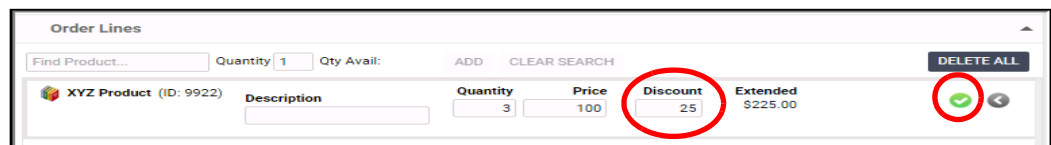
6. Users can process additional **Payments** by accessing the **Accounting** section of an existing order and creating a new Payment.
7. **Save and Close**.

The screenshot shows the 'Order Payments' section with a toolbar and a table:

ID	PAYMENT DATE
3915	01/19/2016

Applying a Discount

1. Enter the **Companies** record you created earlier in class from the **Universal Search**.
2. From the Company Landing page, select **Create Order** from the **Actions** Menu.
3. Create an order line for **3** units of your **XYZ Product**.
4. Click **Next**.
5. At right, click on the **Edit Order Line** button.
6. Change the **Quantity** to **5**.
7. In the **Discount** field, enter **25** (indicates percent).



The screenshot shows the 'Order Lines' interface. At the top, there is a search bar labeled 'Find Product...' and a 'Quantity' field set to '1'. To the right are 'ADD' and 'CLEAR SEARCH' buttons, and a 'DELETE ALL' button. Below this is a table with one row for 'XYZ Product (ID: 9922)'. The table has columns for 'Description', 'Quantity', 'Price', 'Discount', and 'Extended'. The 'Quantity' is '3', 'Price' is '100', 'Discount' is '25', and 'Extended' is '\$225.00'. A red circle highlights the 'Discount' field. To the right of the table is a green checkmark icon in a circle, also highlighted with a red circle.

Description	Quantity	Price	Discount	Extended
XYZ Product (ID: 9922)	3	100	25	\$225.00

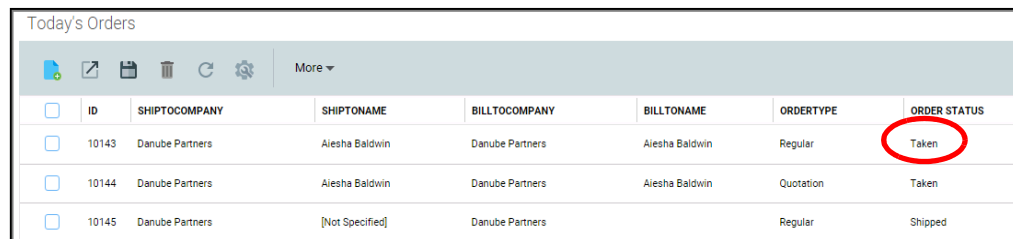
- Notice that the Price has been updated based on the changes made.
8. Click **OK**.
 9. Set the **Payment Type** to **Pre-Paid Check** under the Order's Payment section.
 10. For the **Check Number**, enter random numbers.
 11. Click **Save and Close**.

Note: Only Employees with permissions set on their Employees records will be able to apply discounts at the Order level.

Marking Orders As Shipped

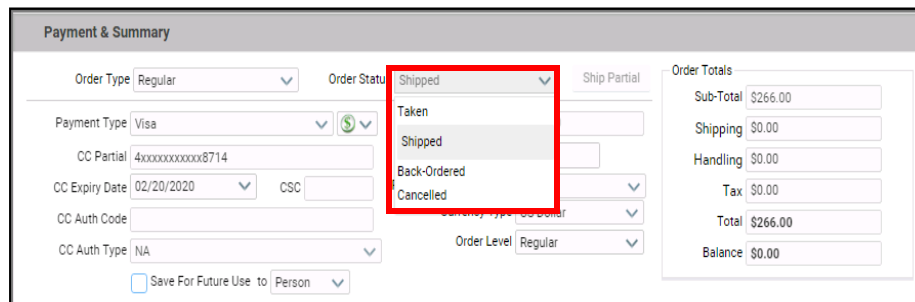
In Aptify Web, once an order is initially processed and saved, it is designated as Taken. To actually Ship an order, users will need to change the Order Status on the Order form from **Taken** to **Shipped**. For accounting purposes, General Ledger (GL) entries are created once an order is marked as shipped.

1. Click on the **Home** dashboard.
2. Open an Order from **Today's Orders** with an **Order Status** of **Taken**.



ID	SHIPTOCOMPANY	SHIPTONAME	BILLTOCOMPANY	BILLTNAME	ORDERTYPE	ORDER STATUS
10143	Danube Partners	Aiesha Baldwin	Danube Partners	Aiesha Baldwin	Regular	Taken
10144	Danube Partners	Aiesha Baldwin	Danube Partners	Aiesha Baldwin	Quotation	Taken
10145	Danube Partners	[Not Specified]	Danube Partners		Regular	Shipped

3. Expand the **Payment & Summary** section.
4. Click the **Order Status** drop-down.
5. Select **Shipped**.



Payment & Summary

Order Type: Regular | Order Status: Shipped | Ship Partial

Payment Type: Visa | CC Partial: 4xxxxxxxxxxxx8714 | CC Expiry Date: 02/20/2020 | CSC: | CC Auth Code: | CC Auth Type: NA | Order Level: Regular

Order Status dropdown options: Shipped, Taken, Shipped, Back-Ordered, Cancelled

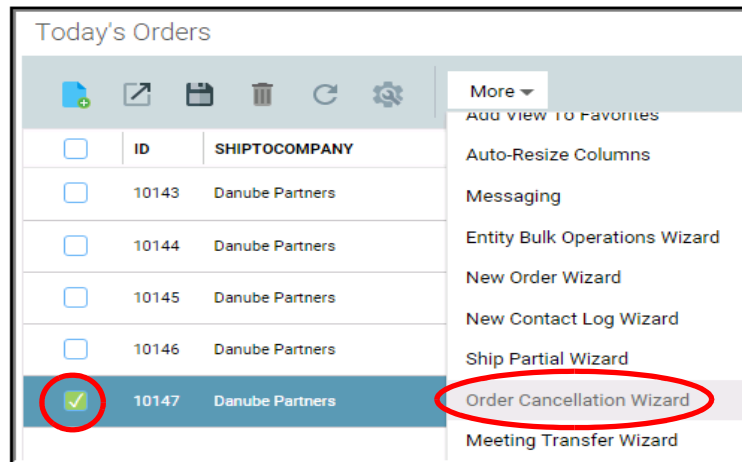
Order Totals:

Sub-Total	\$266.00
Shipping	\$0.00
Handling	\$0.00
Tax	\$0.00
Total	\$266.00
Balance	\$0.00

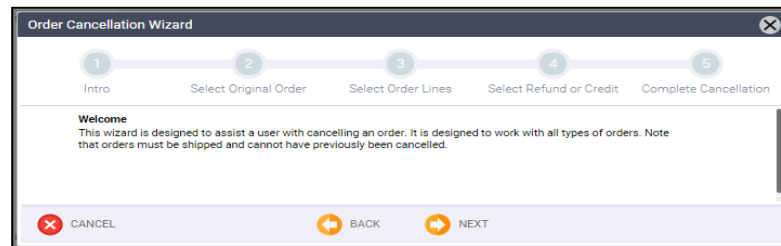
6. Click **Save** to update the order.
7. Refresh the View and confirm that the **Order Status** is **Shipped** for that Order.

Cancelling an Order

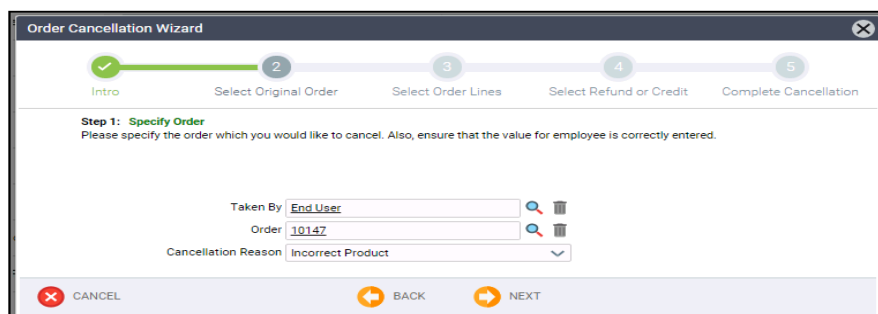
1. From the **Home** dashboard, **Today's Orders** view, select previously **Shipped** order.
2. Click on the **More** dropdown.
3. Select the **Order Cancellation Wizard**.



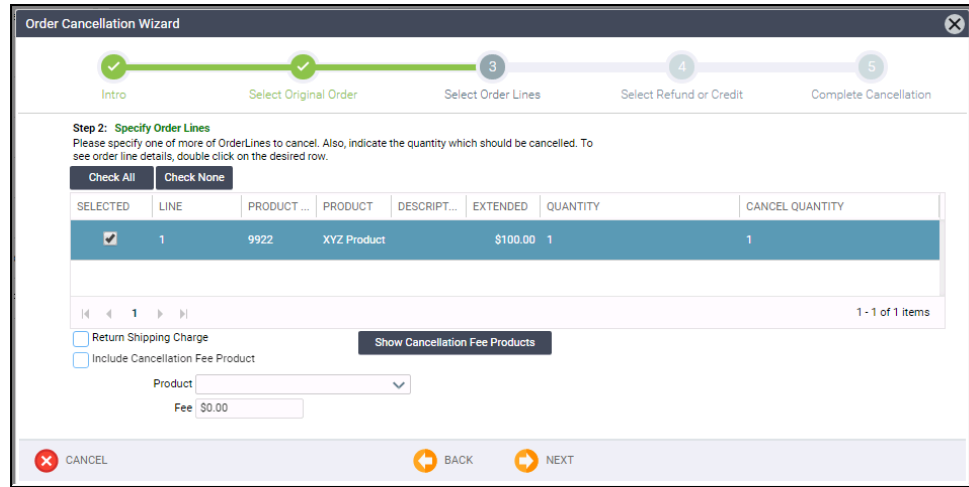
4. Review the welcome screen and note that the wizard indicates that it can only be used on orders with a status of **Shipped**.



5. click **Next**.
6. Employee should populate automatically based on your user's Employees record.
7. Order number should auto-populate **Order** field based on selection from view.
8. From the **Cancellation Reason**, select **Incorrect Product**.



9. Check the **XYZ Product** order line to indicate that it is being returned.



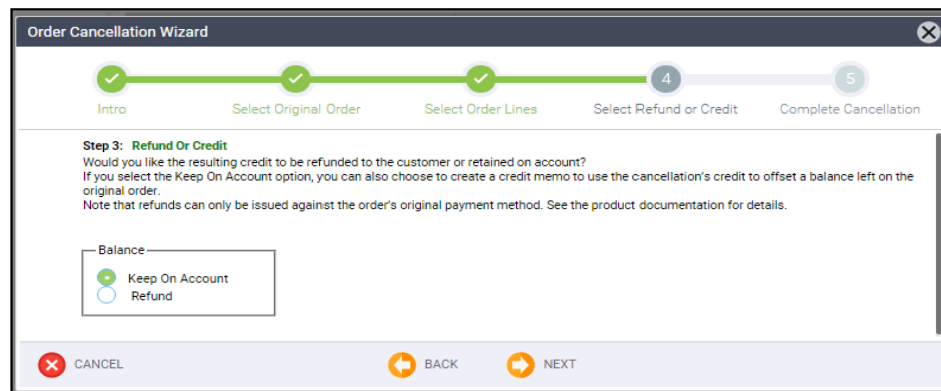
10. Users have several options regarding **additional charges/fees** at this step:

- Return the Shipping Charge (checkbox)
- Include Cancellation Fee Product (checkbox)
- Select the Cancellation Fee Product (Product dropdown)
- Enforce a Fee (free text field)
- View associated Cancellation Fee Products (grey button)

11. Click **Next** to continue.

12. Select **Keep on Account**.

- Users can either keep cancellation credits on account to apply against future orders (creates a Credit Memo) or can refund the amount.
- The Refund Amount is automatically calculated to equal the Cancelled Amount. Users can specify a lower refund amount but not a greater one.



13. Click **Next** to continue.

14. Check **Review The Created Cancellation Order**.

15. Click **Finish** to generate the cancellation order.
16. The cancellation order displays.
 - Notice that the quantity of the order line is negative.
 - Notice that the order total is a credit amount.
 - Notice that the cancellation order is linked to the original order (via the **Original Order** field) and the **Order Type** is **Cancellation**.
 - Notice that the payment is a refund amount equal to the cancellation order total. The original order was paid via credit card and the system automatically generated the refund payment to the same CC account.
17. Change the **Order Status** to **Shipped** and save the order.

A user needs to SHIP cancellation orders for three main reasons:

- Enable Inventory control to inspect the returned product.
- Credit the customers account if product satisfactorily returned.
- Generate GL entries that counter balance the original order's GL entries

18. **Save and Close** the cancellation order.
19. Click **No** when prompted if you want to cancel another order.
20. Note change in views: Orders and My Payments Last 7 Days.
 - **Order Type** should show **Cancellation**.

Orders Views

From the **Quick Search**, enter the text **Find Orders**.

Several selections will display:

Find Orders - Brings back a list of orders by prompted value.

Find Orders Revenue (BASE VIEW) - Brings back a Base View containing all orders AND order lines. When a NON-Orders-Order Lines view is run, it only returns the FIRST line of an order in the View. The Find Orders Revenue (BASE VIEW) displays ALL order lines and the results could contain multiple lines with the same order ID, but showing separate products per line.

Examples are included here for replication and use, but can be expanded upon for more in depth analysis. Users can add their own desired prompts, fields, sorting, etc. by copying and editing the Properties of any of these views.

1. Select the **Find Orders Revenue View**
2. Enter **42** in the **Product ID** prompt.
3. Observe the **Results**.
 - Observe there are two **10113** Order IDs listed - each for a different Order Line. The same product on separate Order Lines indicates that the person ordering wished to ship them to separate locations which can be done via an Order Line.

Find Orders Revenue (BASE VIEW)												
Product ID: 42		Product: <Product>	Bill To Name: <Bill To Name>	Bill To Company: <Bill To Company>	Ship To Name: <Ship To Name>	Ship To Company: <Ship To Company>			GO	CANCEL		
PRODUCT	SHIP TO NAME	SHIP TO COMPANY	QUANTITY	PRODUCT ID	PRICE	DISCOUNT	LINE EXTENDED PRICE	LINE DISCOUNT AMOUNT	ORDER DATE	ORDER STATUS	ID	
^ <input type="checkbox"/> Sampo Baseball Hat	Aiesha Baldwin	Darube Partners	1	42	0.00	0	0.00	0.00	01/12/2016	Shipped	10128	
^ <input type="checkbox"/> Sampo Baseball Hat	Aiesha Baldwin	Darube Partners	1	42	0.00	0	0.00	0.00	01/12/2016	Shipped	10127	
^ <input type="checkbox"/> Sampo Baseball Hat	Baka Lambert	Ottoman	1	42	19.95	0	19.95	0.00	04/27/2015	Shipped	10114	
^ <input type="checkbox"/> Sampo Baseball Hat	Emily Robinson	VC Osaka Technologies Group, Inc.	1	42	19.95	0	19.95	0.00	04/27/2015	Shipped	10113	
^ <input type="checkbox"/> Sampo Baseball Hat	Emily Robinson	VC Osaka Technologies Group, Inc.	1	42	19.95	0	19.95	0.00	04/27/2015	Shipped	10113	
^ <input type="checkbox"/> Sampo Baseball Hat	Aiesha Baldwin	Darube Partners	1	42	19.95	0	19.95	0.00	02/26/2014	Shipped	10094	

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Objective

In this chapter, you will apply payments towards existing orders. The objective of this section is to demonstrate the multiple ways of applying payments.

Payments Overview

Payments are taken at the time of the order

- Using the Order Summary area
- All orders require an initial payment or Purchase Order number with approved credit before it can be saved
- System automatically creates a Payments record based on this information

The Payments service can be used to create additional payments

- When a customer pays off a purchase order
- When a customer, who made an initial payment, pays off an entire balance
- When a customer who made an initial payment pays periodic installments to cover remaining balance

Making a Payment

Payment & Summary Area on an Order Record

Users should access the **Payment & Summary** area to input the initial payment on an order.

Users can open a separate **Payments Record** (from the **Payments** service) to record an installment payment or balance payoff.

Payments Record

When an order is taken with an initial payment made, the system automatically generates a Payments record under the Accounting, Orders Payments area.

Payment Lines - reflect payment made to the order. Automatically assumes full payment.

If not full payment, a user can double click the item and change the information.

If a user knows who the order the payment is for, the accounting tab of that order can be used to generate this form.

Multiple Payments to One Order

Applying Multiple Payments to an Order

1. Create a new **Order** from a **Aiesha Baldwin**'s landing page.
2. Order **The Sampco Way** (product ID #24). Click **Next**.
3. In the **Payment and Summary** section, enter the saved **credit card** information.
 - Note that the **Initial Payment Amount** field changes from grayed out to active
4. In the **Initial Payment Amount**, enter \$75.00 (roughly half of the total).

5. Click **Save**.
6. Change the **Order Status** to **Shipped**.
7. **Save and Close** the Order.
8. Return to the **Home** Dashboard.
9. Refresh the **Today's Orders** View; double-click to open the Order just created.
10. At the record top, left, click **Customer** drop-down; click the **Accounting** tab.
11. Double click the **Payment Lines** Record that displays.
 - Note the indication that a partial payment has been made.

OR...	APPLIES TO	IS TAX	OR...	AMOUNT	PAYMENT AMOU...	COMMENTS
10...	Entire Order	<input type="checkbox"/>	0	\$75.00	\$75.00	Partial Payment on Order ID: 10149

12. Close the **Payments** record.

13. From the displayed **Order, Accounting** section, click **New** under the **Payments** area to create a new, second Payments record for this Order.
14. The system will auto-fill the **Order** number and the remaining order payoff **Amount**.
 - Users can open the payment line to edit the remaining amount or have it applied only to a particular order line.
 - Individual Order Line payment can be used in situations where a company admin orders products on behalf of individuals who must in turn submit separate payments towards the order for their individual product.

15. Click **OK**.
16. Select the **Details** section.
17. Enter payment information.

18. Click **Save** to finalize the payment.
19. From the **Home** dashboard, refresh the **Today's Orders** view.
20. Observe the **Balance** has been reduced from the original charge (based on the amount entered for partial payment).

A Single Payment to Multiple Orders

By using the Payments service, users are able to apply a single payment to multiple orders. The Payments service is found under the Order Entry application.

1. From a persons landing page, **Actions** menu, **Create Order**.
2. Order and Ship the **XYZ Kit Product** - TWICE on separate Orders.
3. Use a **Payment Type** of **Purchase Order** for both orders.
4. Go to **Home** dashboard, **Todays Orders** view.
5. Write down the last **TWO Order IDs**: _____
6. From the **Home** dashboard button bar, select **New Payment**.
7. Click on the **Order Search** button..
8. Enter and click on the first **Order ID** from step 5 in the **Find Orders Record** field.
9. Click the **Select** button.
10. The Order will display below the **Payment Lines** section.
11. Repeat **steps 7-9** for the second **Order**.
12. Click the **Details** section.

The screenshot shows a 'Details' section for a payment. At the top, there are search and filter fields for 'Taken By' (Eric User), 'Person' (Baldwin, Aiesha/Danube Partners), 'Company' (Danube Partners), 'Organization' (Samoco Holdings, Inc.), and 'Payment Party' (Company). Below these are search fields for 'Order Search ...', 'Order #', and 'Invoice #'. The 'Details' section contains the following fields:

- Payment Status: Posted
- Payment Level: Regular
- Cash Control Batch: [Search]
- Payment Date: 01/19/2016
- Deposit Date: 01/19/2016
- Effective Date: 01/19/2016
- Currency Type: US Dollar
- Original Payment: Refund
- Service Charge Account: [Dropdown]
- Service Charge: \$0.00
- Payment Type: Visa
- CC Partial: 4xxxxxxxxxx8714
- CC Expiry Date: 02/20/2020
- CC Auth Code: [Field]
- CC Auth Type: NA

A 'Refund This Payment' button is located at the bottom right of the form.

13. Enter the saved payment type.
14. Click **Save and Close**.
15. Return to the **Home** dashboard.
16. Refresh **Today's Orders** view.- observe the two orders Balance Totals are now \$0.00.

Over Payments

At times, a user may receive payments in the mail that are written for more than the balance due on orders. Aptify will allow processing of an overpayment. The overpayment will be considered a **Credit Memo**. The Credit Memo can be applied for future purchases by linking the credit order to a new Orders record.

In this exercise, a user will process an overpayment for an order and create a credit memo.

1. Create a new **Order** for one unit of the **Sampco Baseball Hat** product.
2. Enter a **PO** payment type with the PO number of **778**.
3. **Save** but do not close the order.
4. Select the **Accounting** tab and then click the **Order Payments** sub-tab.
5. Select the **New Record** icon.
 - A new Payments record appears, with a payment line for the balance on the order.
6. Double-click the payment line to open the **Payment Lines** record.
7. Edit the **Comments** field to indicate that this payment line applies to 1 unit of *Sampco Baseball Hat* product. Click **OK** to close this record.
8. To open a second **Payment Lines** record, Click the **New Record** button.
9. In the **Order** field, enter the **Order ID** for the order opened in Step 1.
10. Leave the **Applies To** set to **Entire Order**.
11. In the **Amount** field, enter **\$200**.
12. In the **Comments** field, Enter **Customer Overpayment**.
13. Click **OK**.
 - The Payment Total updates to \$200 greater than the order amount.
14. Select the **Details** tab.
15. From the **Payment Type** drop-down list, select **Pre-Paid Check**.
16. In the **Check Number** field, enter a check number.
17. Click **Save and Close**.
18. Click **Save** on the **Orders** record.
 - Notice that the Balance on the order has been updated to (200.00), indicating that the Person has a \$200 credit. This order can be referenced as a Credit Memo to pay for another order from the same **Person** or **Company**.

Payments Views

From the **Quick Search**, enter the text **Find Payments**

Several possible selections will display:

Find Payments - Brings back a list of orders by prompted value.

Find Payments by Date Range - Brings back a list of orders by a specified date range.

Find Payments by Date Range AND - Brings back a list of orders by a specified date range AND one prompted value.

These examples are included here for replication and use, but can be expanded upon for more in depth analysis. Users can add their own desired prompts, fields, sorting, etc. by copying and editing the Properties of any of these views.

1. Select the **Find Payments View**
2. Enter **Danube** in the **Company Name** prompt.
3. Observe the **Results**..

Find Payments									
Paid By:	<Person>	Company Name:	Danube	Order ID:	0	Type Begins With:	<Type>	GO	CANCEL
ID	PAYMENT DATE	PAIDBY	COMPANYNAME	STATUS	PAYMENT TYPE				
1247	04/15/2007 09:23:45 PM	Aiesha Valdez	Danube Partners	Batched	Visa				
1351	04/15/2007 09:23:45 PM	Mia Holland	Danube Partners	Batched	Visa				
1437	04/15/2007 09:23:45 PM	Alexander Neal	Danube Partners	Batched	Visa				
1536	04/15/2007 09:23:45 PM	Michael Garner	Danube Partners	Batched	Visa				
1647	04/15/2007 09:23:45 PM	Theodore Byrd	Danube Partners	Batched	Visa				
1691	04/15/2007 09:23:45 PM	Jessica Rodriguez	Danube Partners	Batched	Visa				
1776	04/15/2007 09:23:45 PM	Andrew O'Neal	Danube Partners	Batched	American Express				
2944	07/16/2007 09:25:27 PM	Gabriela Mann	Danube Partners	Batched	Pre-Paid Check				
1809	11/01/2007 09:24:41 PM	Kaitlyn Scott	Danube Partners	Batched	Mastercard				

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Membership Views.....	12.17

Objective

In Associations and Membership based organizations, the core around which the organization functions is Membership. **In Aptify, Membership is considered a Subscription based product due to the tracking of deferred income.**

The Subscriptions service keeps track of products sent to a Person on a recurring basis, such as membership, magazines, newsletters, or journals. Unlike a regular product item, a subscription product has the ability to track persons who are purchasing future issues and fulfill their orders based on their status.

Aptify enables users to create “extended” products that support additional product features based on the product type. Extended products, however, can also be a subscriptions product and sent to a customer regularly. A membership or a monthly journal are examples of extended, subscription products.

In this chapter, users will primarily be focused on Membership Subscription products/orders, but some of these same steps/processes can be applied to Magazines, Periodicals, Newsletters, etc.

Two Types of Subscriptions

- **Manually renewed Membership Subscription**
 - Subscription is ordered
 - Subscription is shipped
 - User Opens up a monthly view of Subscriptions for desired month
 - User runs the Subscription Renewal Wizard from View's toolbar
 - Order Quotations are generated for that Subscription
 - User generates invoices and sends them to customers
 - Upon receipt of new payment, user changes Subscription order from status of Quotation to Shipped
- **Auto-renewed Membership Subscription**
 - Subscription is ordered
 - User opens up the Order line for the Subscription
 - User puts check mark in the Auto Renew check box on the Subscription tab
 - Subscription is shipped
 - User can open up the Subscription order that was generated
 - User can open the Renewal tab & click the Standing Order link to modify:
 - Date Expires (match CC info/desired length of subscription)
 - Schedule
 - Order Information (change recipients)
 - User runs Standing Order Fulfillment Wizard periodically to fulfill subscriptions that have associated standing orders

Membership Subscription Length/Number of Copies

Same basic order process as for other product types except:

- **Changes in an order line Quantity increase length of subscription**
 - For example, ordering a Monthly Newsletter with a quantity of 2 creates a two-year subscription
- **Ordering multiple copies of each issue for same Person/Company**
 - Known as a "Bulk Subscription"
 - Specify number of copies on Order Line Details form
- **Order Total increases automatically if the number of copies increases.**

Creating a Membership Dues Product

1. Click the **Product Maintenance** Application; open a new **Products** record.
2. In the **Name** field, enter **XYZ Membership Dues** (where *XYZ* are your initials).
3. In the **Category** field, enter **Memberships**.
4. Verify that **Type** is set to **General**.
5. Click the **General** tab; under the **Subscription** tab, click **General**.
6. Check the **Subscription Item** checkbox.
7. From the **Subscription Type** drop-down list, select **Monthly**.
8. In the **Issues** field, enter **12**.
 - The Subscription Type is set to Monthly with 12 issues for a one-year membership to comply with General Accepted Accounting Principles (GAAP). This enables the system to track the product for Deferred Income.
9. In the **Grace Period** field, enter **1**.
10. Verify that the **Restart After Days** field is set to **180**.
11. Verify that the **Restart By** field is set to **Continue Existing Subscription**.

The screenshot displays the configuration form for a product named "XYZ Membership Dues (ID: 9947)". The form is organized into several sections:

- Product Information:** Fields for Name (XYZ Membership Dues), Category (Memberships), Type (General), and Parent Product.
- Subscription > General:** This section contains the following fields:
 - Subscription Item
 - Subs. Type: Monthly
 - Issues: 12
 - Grace Period: 1
 - Renewal Behavior:**
 - Restart After Days: 180
 - Restart By: Continue Existing Subscription
 - Show Prompt
 - Calendar Year Subscription:**
 - Start Date: [dropdown]
 - Turnover Date: [dropdown]
 - Prorate Behavior: None
- Company Subscription Function:** A field at the bottom of the form.

12. Under the **Subscription** tab, click the **Membership** tab.
13. In the **Dues Product** check box, **click to select**.
14. In the **Member Type** field, enter **Member**
15. Leave the **Member Start Date** field set to **Use Subscription Settings**.

Subscription > Membership ▾

Dues Product

Member Type: Member ▾

Member Start Date: Use Subscription Settings ▾

16. Click the **Accounting** tab and verify that the **Deferred Income** check box is checked.

Accounting > General ▾

Invoice Type: Standard ▾

Taxable

Revenue Recognition

Deferred Income

Cash Basis Acctg

Rev. Rec. Date: ▾

17. Select the **Prices** tab, **Pricing Table**.
18. Click **New** to create a new Prices Record.
19. Add **Member-Renewal** price of **\$250 - Member Type -Member**.

Prices record

General ▾

Name: Member Renewal

Price: \$250.00 Includes Tax Default

Member Type: Member ▾

Include Sub-Member Types

Type: Regular ▾ % of Base: 0

Start Date: ▾ End Date: ▾

Minimum Quantity: 0

Maximum Quantity: 0

Pricing Rule: [Search] [Add]

Currency Type: US_Dollar [Search] [Delete]

Derived From Currency: [Search] [Add]

Description:

OK AND NEW OK CANCEL

20. Add **Non-Member Join** price of **\$500 - click Default - Member Type to Non-Member**
21. **Save and Close**.

Prices > Pricing Table ▾

NEW EDIT DELETE [Sort icons]

	NAME	PRICE	INCLUDES TAX	MEMBER TYPE
<input type="checkbox"/>	Member Renewal	\$250.00	<input type="checkbox"/>	Member
<input type="checkbox"/>	Non-Member Join	\$500.00	<input type="checkbox"/>	Non-Member

Understanding Membership/Subscription Dates

By default, a subscription in Aptify begins on the date the order is taken and ends when all the issues have been fulfilled or the subscription is canceled. However, if a subscription or membership is annual, a user can specify a **Start Date** and **Turnover Date** in the subscription's Products record to create a renewal range.

- Any membership subscription created after the current Start Date but before the next Turnover Date is assigned the current year's subscription.
- Any membership subscription created after the Turnover Date and before the next Start Date is assigned next year's subscription.

For example, if the current membership subscription cycle started on January 1st and the next turnover date is March 31st, a subscription order placed on March 15th would have a start date of January 1st. The subscriber may receive back issues for the first three months of that year and then continue to receive monthly issues for the rest of the subscription period depending on the organization's business practice.

An order for the same product taken on April 1st would begin on January 1st of the following year because the order was taken after the turnover date.

If no dates are entered in the Start Date and Turnover Date fields, a subscription **begins on the date the order is taken and ends when all the issues have been fulfilled or the subscription is canceled.**

Understanding Membership/Subscription Renewals

Organizations can determine how to handle lapsed subscriptions using the subscription product's **Renewal Behavior** settings. For example, an organization may wish to treat a renewal that is less than 60 days late as part of the original subscription, while classifying renewals after 60 days as new subscriptions.

Suppose, for example, that a customer wishes to renew their membership after it has lapsed for one year. Users would not want the subscription start date to be the end of their last subscription, since then their membership would expire immediately. In this case, the membership should be treated as a new subscription.

Alternatively, if a customer is only 30 days past due for renewing, an organization may wish to consider any membership purchase as a renewal, since the organization may offer benefits for maintaining continuous membership.

Note that while the system changes the Member Type of a Persons record or Companies record to a member status when the membership product is purchased, it does not change the Member Type back to a non-member status when the membership expires. This allows for an arbitrary grace period to be established. A view can be set up to list all persons or companies whose memberships have expired for *X* number of days, and then manually change their membership status back to a non-member type. Alternatively administrators can create an Entity Bulk Operation to update records in one operation.

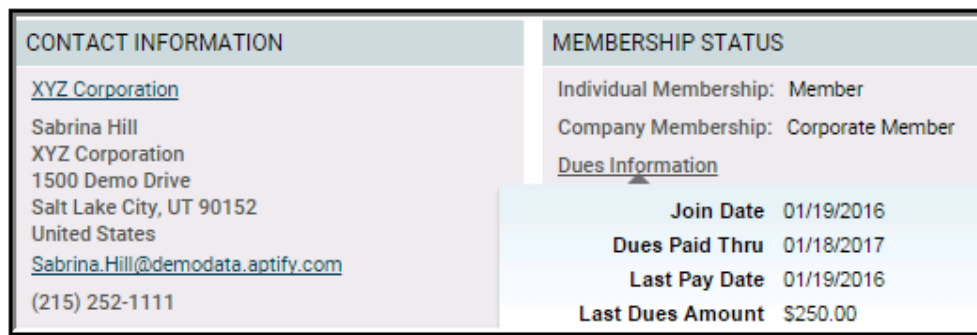
Ordering a Membership Dues Product

This exercise demonstrates how a Non-Member places an order for a membership dues product and how Non-Member status automatically changes to Member status.

1. Open your **Persons** record.
2. Observe the current **Membership Status** on the Landing Page.
3. Verify that the Individual **Membership Type** is **Non-Member**.
4. Float the cursor over the **Dues Information** linked field.



5. Click on the Actins - **Create Order** button.
6. Create an order line for 1 unit of **XYZ Membership Dues**.
7. Enter **Payment** information.
8. Click **Save**.
9. Change the status to **Shipped**.
10. **Save and Close** the Orders record.
11. Open your **Persons** record from **Home - Recently Used Records**.
12. Verify that the Individual **Membership Type** has changed to **Member**.
13. Float the cursor over the **Dues Information** linked field - it is updated.



Membership Enrollment Wizard

A membership order can also be entered with the Membership Enrollment Wizard for persons or companies. The steps are similar to the New Order Wizard. The following instructs how to order membership for an individual.

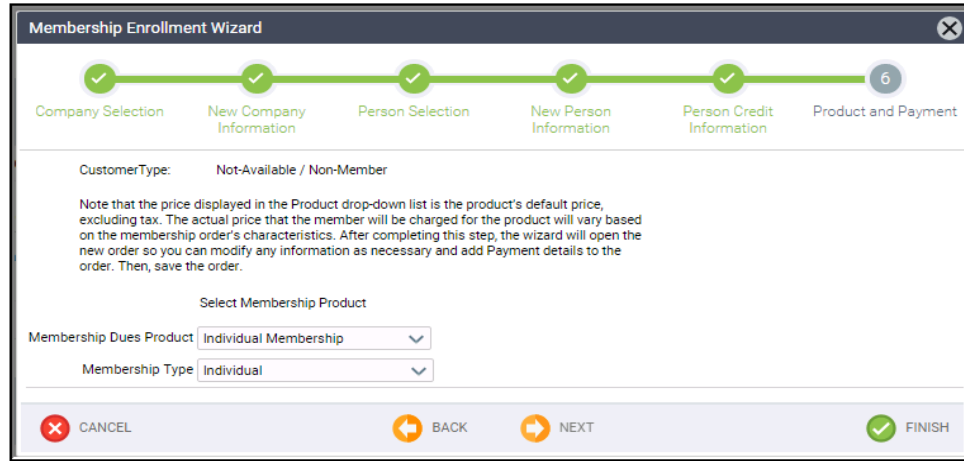
1. From the **Membership Application**, click the **Membership Enrollment Wizard**.
2. To enroll an individual, enter **No Company**. Click **Next**.

The screenshot shows the 'Membership Enrollment Wizard' window. At the top, a progress bar indicates six steps: 1. Company Selection, 2. New Company Information, 3. Person Selection, 4. New Person Information, 5. Person Credit Information, and 6. Product and Payment. The current step is 1. Below the progress bar, a welcome message reads: 'Welcome to the Membership Enrollment wizard! This wizard lets you easily create membership orders for new or existing Persons and Companies. To begin, select a company option below: **New Company, Existing Company, or No Company (for individual membership purchases).**' Below this, a prompt says 'Select the company you would like to enroll.' There is a search box labeled 'Company' with a magnifying glass icon and a green plus icon. Below the search box is a dropdown menu labeled 'Company Mode' with 'No Company' selected. At the bottom of the window, there are three buttons: 'CANCEL' (red with a white X), 'BACK' (orange with a white left arrow), and 'NEXT' (orange with a white right arrow).

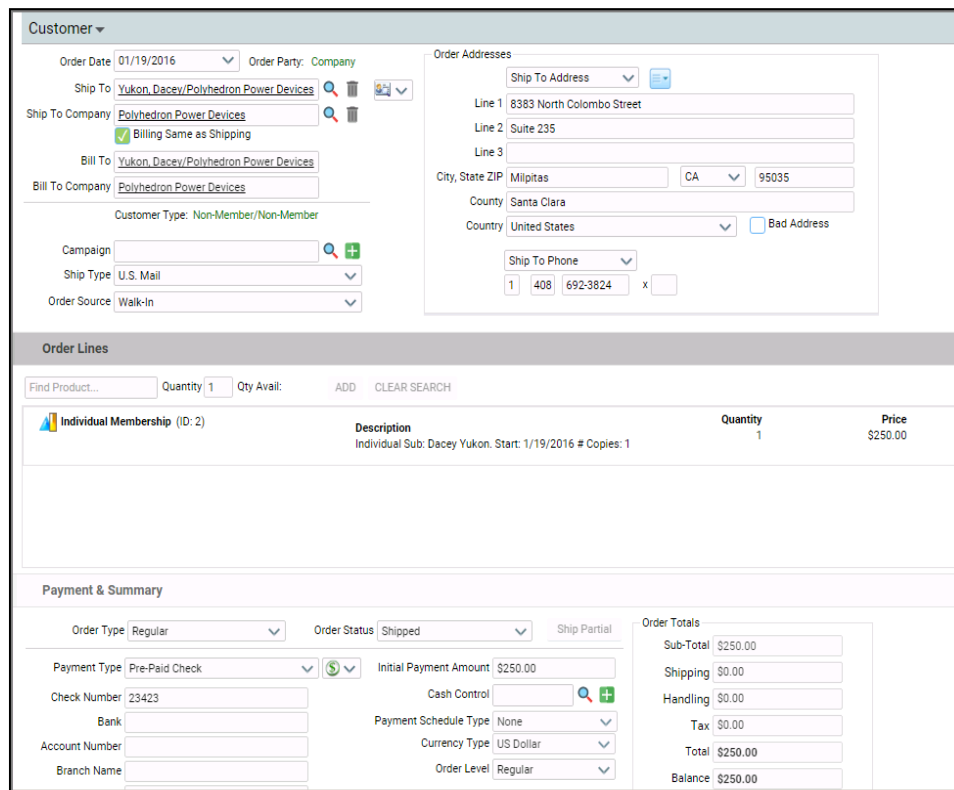
3. Enter **ID 05, Dacye Yukon..**
4. Click **Next**.

The screenshot shows the 'Renew Subscriptions' window. At the top, a progress bar indicates three steps: 1. Start, 2. Select Due Date, and 3. Confirm. The current step is 2. Below the progress bar, a message reads: 'This wizard will renew subscriptions for the current selected items. If no item selected, the entire contents of this view will be renewed. Click next to continue.' At the bottom of the window, there are three buttons: 'CANCEL' (red with a white X), 'BACK' (orange with a white left arrow), and 'NEXT' (orange with a white right arrow).

5. Enter **Individual** membership.
6. Click **Finish**.



7. An Order for **Membership** displays.
8. Enter **Payment**.
9. Change **Order Type** from **Quotation** to **Regular**.
10. Change **Order Status** to **Shipped**.
11. Click **Save and Close**.



Manually Renewing Memberships/Subscriptions

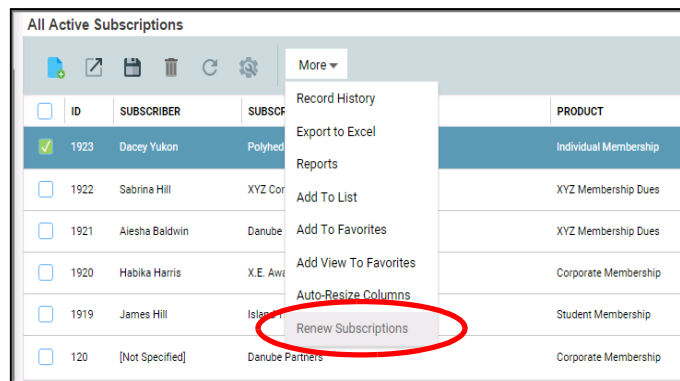
The Subscription Renewal Wizard examines a Subscriptions record and generates a quotation order for the Subscription product. **Once the Quotation is created and a customer indicates they wish to renew, users can change the quotation order to a regular order, and renew the subscription.**

Aptify recommends configuring the messaging system to automatically email customers whose subscription will soon expire, reminding them to renew. This can be done by creating a view of subscriptions that will end within a certain time frame, and using the Subscription Renewal Wizard to create quotation orders for each subscription.

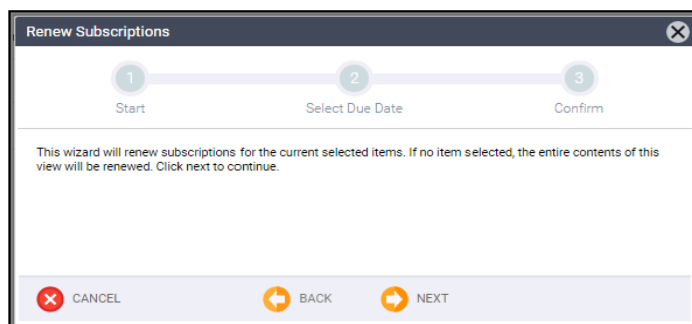
Users can then create a view of quotation orders and send a pre-configured message to each person associated with the orders. Different messages may be sent depending on when the subscription will expire, so that customers know when they must renew by, as well as how to renew.

Follow the steps below to manually renew a subscription:

1. Use **Quick Search** to find and open the **All Active Subscriptions** view.
2. Select the first **Membership Dues** subscription (from recent Membership purchase).
3. Click the **More** button.
4. Select **Renew Subscriptions**.



5. When prompted that the user is renewing 1 subscription, click **Next**.



- In the **Due Date** field when prompted, enter the last date of next month.

The screenshot shows a 'Renew Subscriptions' dialog box with a progress bar at the top. The progress bar has three steps: 'Start' (completed, green checkmark), '2 Select Due Date' (current step, grey), and '3 Confirm' (grey). Below the progress bar, the text reads 'Please enter the desired due date.' There is a dropdown menu for 'Renewal Due Date' set to '03/31/2016'. Below that are two checkboxes: 'Identify Contact Person by Function for Company Subscriptions' and 'Group Subscriptions with Same Subscriber Person on One Order', both of which are unchecked. At the bottom, there are three buttons: 'CANCEL' (red X), 'BACK' (orange left arrow), and 'NEXT' (orange right arrow).

- Click **Next** to continue.

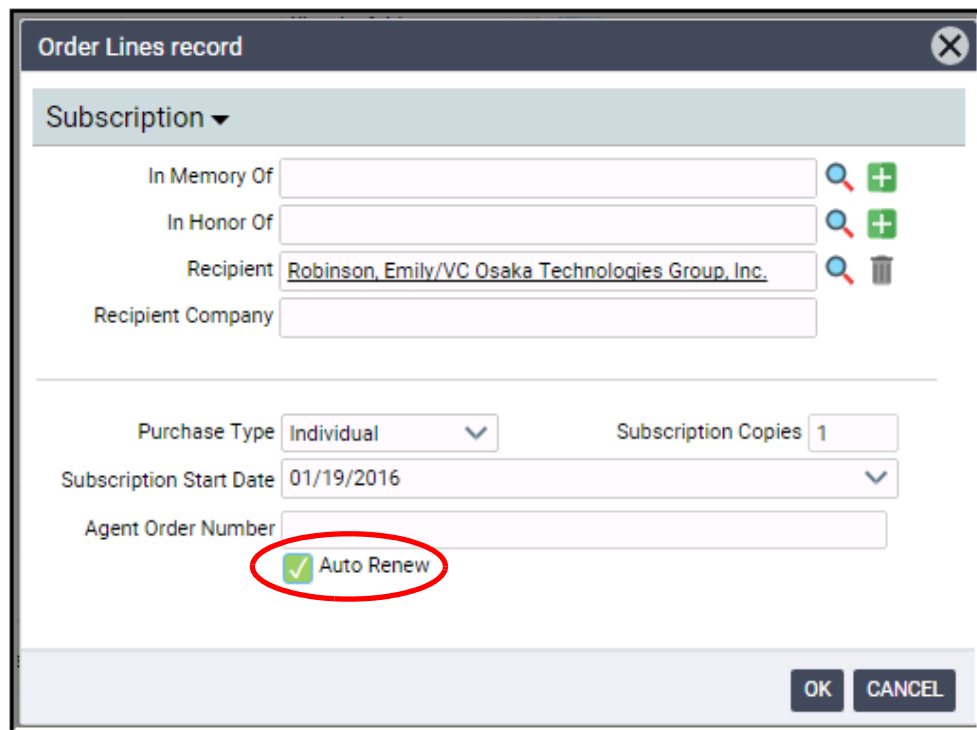
The screenshot shows the 'Renew Subscriptions' dialog box at the 'Confirm' step. The progress bar now shows 'Start' and '2 Select Due Date' as completed (green checkmarks), and '3 Confirm' as the current step (grey). The main text area says 'This wizard will renew 1 Subscription(s) with a due date of 03/31/2016. Click Finish to continue.' At the bottom, there are four buttons: 'CANCEL' (red X), 'BACK' (orange left arrow), 'NEXT' (orange right arrow), and 'FINISH' (green checkmark).

- Read the message that the subscription with a due date of xx.
- Click **Finish** to continue.
 - Aptify automatically created an **order quotation** for the subscription renewal.
- Click on the **Home** dashboard.
- Look at the **Today's Orders** view.
- Locate the most recent order whose **Ship To Name** is your **Person**
- Double-click to open the quotation order.
- Change the **Order Type** from **Quotation** to **Regular**.
- Change the **Order Status** to **Shipped**.
- In the Summary area, enter the payment information (use Pre-Paid Check or credit card).
 - Note that the Payment Type defaults to Purchase Order for quotations created by the renewal wizard.
- Click **Save**.
- Open your persons record. Click the **Subscriptions** tab.
 - Notice that the End Date is now two years from the Start Date. If a user opens the Subscriptions record, the number of **Issues Purchased** has increased to 24.

Auto-Renewing Memberships/Subscriptions

Auto-Renewing subscriptions automatically generate standing orders that can regularly be converted to regular orders. Once the regular order is shipped, the subscription is renewed. Aptify strongly encourages all organizations to use auto-renewal, so that customers never forget to renew their membership.

1. Type 06, and open Emily Robinson's Persons record from .Quick Search.
2. Select **Create Order** from the **Actions** Menu.
3. Order the **XYZ Membership** product.
4. Enter **Payment** information.
5. **Save** the record (BUT DO NOT SHIP).
6. Open the **Order Lines** record.
7. From the **Extended** tab drop-down, select the **Subscriptions** tab.
8. Click to check the **Auto Renew** checkbox.



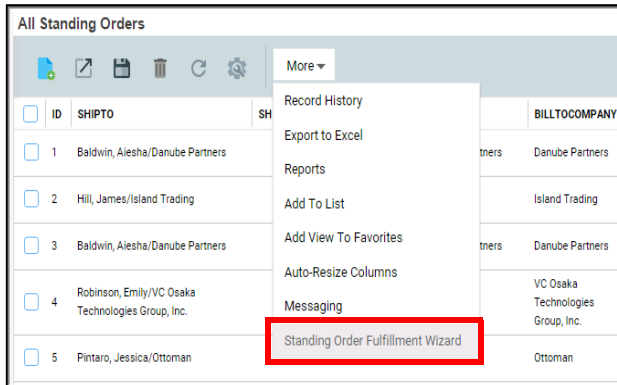
The screenshot shows the 'Order Lines record' window with the 'Subscription' tab selected. The window contains the following fields and controls:

- In Memory Of**: Text input field with a search icon and a plus sign.
- In Honor Of**: Text input field with a search icon and a plus sign.
- Recipient**: Text input field containing 'Robinson, Emily/VC Osaka Technologies Group, Inc.' with a search icon and a trash icon.
- Recipient Company**: Text input field.
- Purchase Type**: Dropdown menu set to 'Individual'.
- Subscription Copies**: Text input field set to '1'.
- Subscription Start Date**: Text input field set to '01/19/2016' with a dropdown arrow.
- Agent Order Number**: Text input field.
- Auto Renew**: A checked checkbox, circled in red.
- OK** and **CANCEL** buttons at the bottom right.

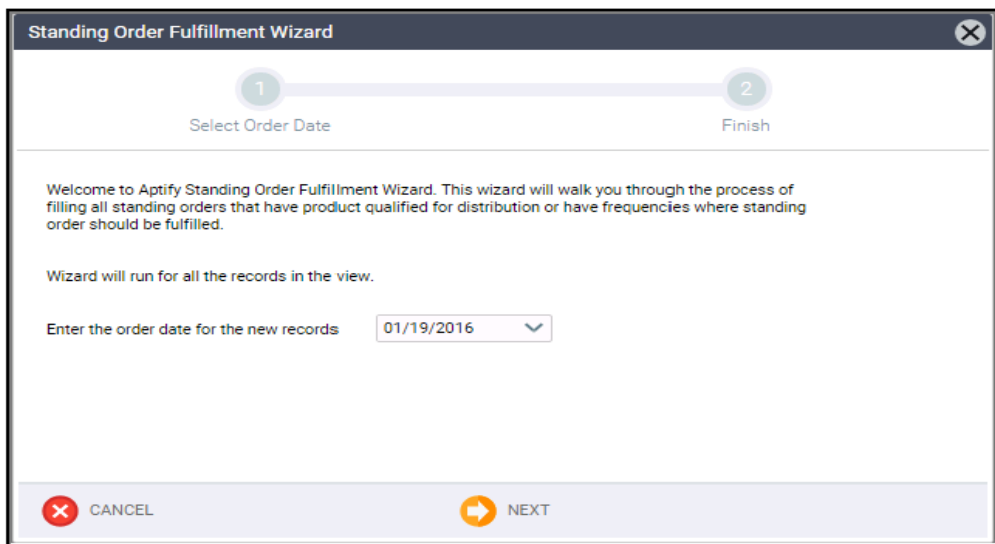
9. Click the **OK** button.
10. From the **Orders** record, change the **Order Status** from Taken to **Shipped**.
11. Click **Save and Close**.

Fulfilling the Auto-Renewal Standing Order

1. From Quick Search, open the **Active Standing Orders** view.
2. Select the **Membership Dues** standing order at the very top - sorted by ID.
3. Click the **More** dropdown.
4. Select the **Standing Order Fulfillment Wizard**.



5. Click **Next** to continue.
6. Leave the **Order** dates as is; normally this would be changed to desired process date.
7. Click **Next** to continue.



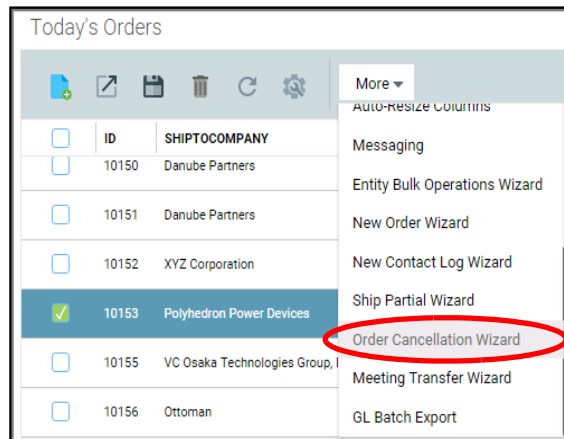
8. For Step 2, the wizard automatically inserts today's date as the Order Date. Click **Next** to continue without changing the Order Date.
9. To process the **Standing Order**, click **Finish** and then when prompted, click **OK**.
10. When notified that the Standing Order fulfillment completed successfully, click **OK**.
11. Within the **Standing Orders** view, double-click to open the standing order that was just fulfilled.
12. Select the **Purchases** tab.
13. There will be **no record** here until the date of shipment has been reached (i.e. the first day of the subscription), then deferred income will be actualized.

Cancelling a Membership/Subscription

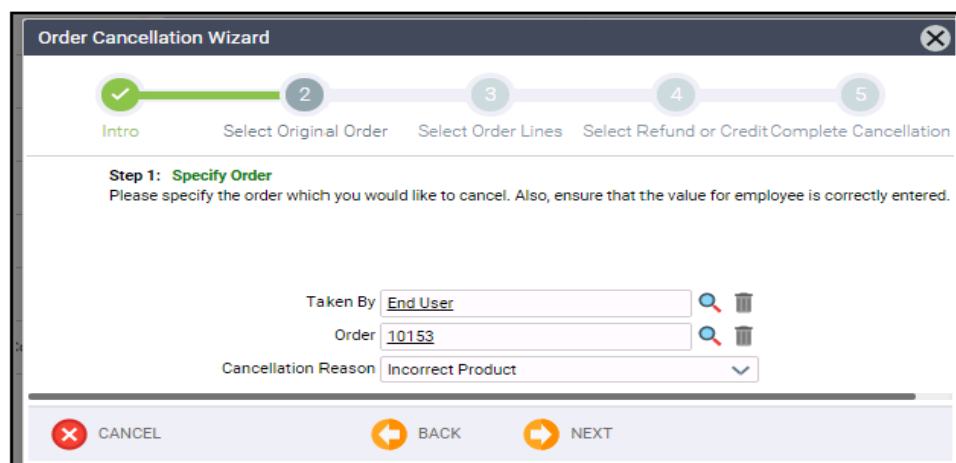
Subscriptions - Full Cancellation

A membership or subscription can be cancelled similar to cancelling a physical product as covered in the **Order Entry** chapter.

1. From the **Home** dashboard, **Today's Orders** view, select the last Membership order.
2. From the **More** button drop-down, select the **Order Cancellation Wizard**.



3. The Welcome screen displays - Click **Next**.
4. The order defaults to the name of the employee **Taken by**. If a record had been selected, the **Order** field will auto-fill with the ID, otherwise enter the number.
5. From the **Cancellation Reason** drop-down list, select **Incorrect Product**.



6. Click **Next**.
7. Select the **XYZ Subscription** order line **checkbox**.
8. Leave the **Cancel Quantity** set to **1**.

Order Cancellation Wizard

Intro Select Original Order **Select Order Lines** Select Refund or Credit Complete Cancellation

Step 2: Specify Order Lines
Please specify one of more of OrderLines to cancel. Also, indicate the quantity which should be cancelled. To see order line details, double click on the desired row.

Check All Check None

SELECTED	LINE	PRODUCT ...	PRODUCT	DESCRIPT...	EXTENDED	QUANTITY	CANCEL QUANTITY
<input type="checkbox"/>	1	2	Individual Membership	Individual Sub: Dacey Yukon. Membership Start:	\$250.00	1	0

Return Shipping Charge
Include Cancellation Fee Product

Product
Fee \$0.00

9. Click **Next** and follow the on-screen instructions to complete the cancellation process.
 - When prompted to select a balance type, select **Keep on Account**.
10. Click **Next**.
11. Check the **Review The Created Cancellation Order**.
 - If left unchecked, another user will have to process the order to Shipped for the Credit to Account to take place and for GL's to be corrected.
12. Change the Cancellation Order **Status** to **Shipped**.
13. Click to **Save and Close** the Order record.
14. Open the **Subscriptions** service and run the **All Active Subscriptions** view.
15. Double-click the most recent entry to open the corresponding **Subscriptions** record.
 - Notice that the **Status** field is set to **Cancelled** and the Cancellation Order cancelled all 12 issues of the monthly subscription.

Subscriptions - Partial Cancellation

1. Follow the same steps as in the previous exercise to enter an order for the XYZ Subscription product.
2. From the Order in the **Orders Over the Last 30 Days** view.
3. Change the Status to **Shipped**.
 - A product must have a status of Shipped to be finalized.
4. In the View, click to activate the recent record.
5. From the view toolbar, the **More** button drop-down, click the **Order Cancellation Wizard** tab to launch the wizard.
6. Click **Next**.
7. The order defaults to the name of the employee **Taken by**. If a record had been selected, the **Order** field will auto-fill with the ID, otherwise enter the number.
8. Leave the **Cancellation Reason** blank
9. Click **Next**.
10. In the check box for the XYZ Subscription order line, place a check mark.
11. Set the **Cancel Quantity** to **.5** (half)
 - This will cancel half of the subscription. Therefore, for a 12-month subscription, this will cancel 6 issues.
 - Note that a user can also enter a fraction (such as 6/12) in the Quantity field and Aptify will automatically convert the fraction to the decimal value.
12. To complete the cancellation process, click **Next** and follow the on-screen instructions.
 - When prompted to select a balance type, select **Keep On Account**.
13. **Save and Close** the order.
14. Open the view of the **Subscriptions** service.
15. Double-click the most recent entry to open the Subscriptions record.
 - Notice that the Subscription's Status is still Active but the End Date for the original subscription purchase is 6 months in the future rather than 1 year.
16. Double-click the entry.
17. Click the **Purchases** tab.
 - Notice that the number of **Issues Purchased** is half the total.

Membership Views

From the **Quick Search**, enter the text **% Expiring in**.

Several selections will display:

Members Expiring in 90 Days

Members Expiring in the next 60 Days

Quotations for Membership Expiring in 30 Days Ago

Quotations for Membership Expiring in 60 Days Ago

Quotations for Membership Expiring in 90 Days Ago

Quotations are generated as a result of running the Subscription Renewal Wizard. Users often schedule these views to run automatically and send a renewal notice via a process flow to members whose membership is coming due. These renewal notices are usually scheduled to go out periodically at 90, 60, 30, 14, 7, etc. days from the actual renewal date. As users pay for membership they drop off the view(s) by a filter of **Balance Due being greater than 0**.

Examples are included here for replication and use, but can be expanded upon for more in depth analysis. Users can add their own desired prompts, fields, sorting, etc. by copying and editing the Properties of any of these views.

1. Select the **Members Expiring in 90 Days View**
2. Observe the **Results**.
 - Only one Order displays due to limited records in the Training DB.

Members Expiring in 90 Days				
ID	FIRST NAME	LAST NAME	MEMBER TYPE	
37	James	Hill	Student Member	

1. From the **Quick Search**, enter the text **Find Persons**.
2. Select the **Find Persons - Join Date/Membership View**.
3. Enter **Student** in the Member Type prompt.
4. Observe the **Results**.

Find Persons - Join Date/Membership					
FIRST NAME	LAST NA...	JOIN DATE	COMPANY	MEMBER TYPE	
Luke	Garcia	07/22/2013	PT Astra International Tbk.	Student Member	
Logan	Rodriquez	07/22/2013	La corne d'abondance	Student Member	
Luke	Zagreb	07/22/2013	Reggiani Caselfici	Student Member	
Emily	May	07/22/2013	Cottonwood Taping Systems	Student Member	

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Creating a Campaign Segment	13.5
Creating a Campaign Segment	13.5
Adding Prospects to a Campaign.....	13.7
Campaign Views.....	13.11

Objective

In this chapter, you will have the opportunity to work with Campaigns. This includes:

- Creating Campaigns, manually or using the Campaign Setup Wizard
- Creating Campaign Segments to target your marketing efforts
- Adding Persons to a Prospect List
- Apply a Campaign to an Order

Campaigns Overview

Allows organizations to create different marketing campaigns

- Sales to move products
- Campaigns to increase product awareness

Within the service, organizations have the ability to:

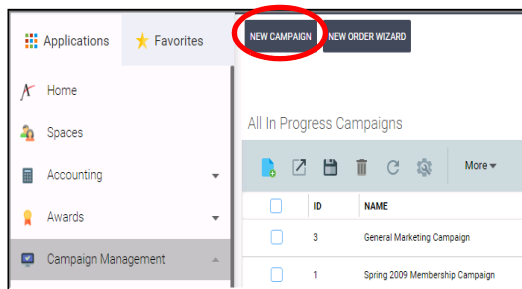
- Discount products based on Membership type
- Discount Products and/or Product Categories
- Tie a Prospect List to a campaign
- Track Prospect status
- Whether they have accepted or declined the marketing offer
- Track Documents and Tasks related to a Campaign effort

At the time of order, the order entry person can specify a campaign for the entire order **or** apply the campaign to a specific order line

Setting up a Campaign

The Campaign Management application enables users to incorporate products specifically tied to a marketing campaign in order to offer discounted prices. Campaigns can be used for marketing membership, meetings, etc. Once a campaign is tied to an order, all products linked to the campaign will display the appropriate discount.

1. Select the **Campaign Management** application.
2. Click on the **New Campaign** button.



3. In the **Name** field, enter **XYZ Campaign**.
4. In the **Description** field, enter **Introduce XYZ Product**.
5. Enter an **End Date** of one month from today.
 - Today's date automatically populates in the **Start Date** field.
6. Enter **Marketing** in the **Type** field.
7. Enter the **Status** as **In-Progress**.
8. In the **Coordinator** field, enter an **Employee** number or name.
9. Check the **Invitation Required** checkbox.
 - When checked, only persons and companies in the Campaign's prospect list with a status of **Invited** will be able to respond to the campaign.

Name: XYZ Campaign
 Parent:
 Description: Introduce the XYZ Product.
 Start Date: 01/13/2016 End Date:
 Type: Marketing
 Status: In-Progress
 Coordinator: End User
 Meeting: Invitation Required

10. Click the **Discounts > Products** section.
11. Click the **New** button.
12. In the **Product** field, enter the name of your **XYZ Product** (*XYZ* = your initials).
13. From the Discount **Type** drop-down, select **Discount %**.
14. In the **Discount %** field, enter **20%**.
15. In the **Member Type** field, enter **Member**.
 - Members will receive a 20% discount on this product

Product: XYZ Product
 Type: Discount %
 Currency Type:
 Discount Amount: \$0.00
 Discount %: 20
 Amount: \$0.00
 Member Type: Member
 Include Sub-Member Types

16. Click the **OK AND NEW** button.
17. In the **Product** field, enter **XYZ Product**.
18. From the **Discount Type** drop-down, select **Discount %**.
19. In the **Discount %** field, enter **10%**.
20. In the **Member Type** field, enter **Non-Member**.
21. Click the **Ok** button.
22. **Save** the Campaign record.

Name: XYZ Campaign

Parent: [Search] [Add]

Description: Introduce the XYZ Product.

Start Date: 01/13/2016 [Dropdown] End Date: [Dropdown]

Type: Marketing [Search] [Delete]

Status: In-Progress [Search] [Delete]

Coordinator: End User [Search] [Delete]

Meeting: [Search] [Add] [Check] Invitation Required

Discounts > Products [Dropdown]

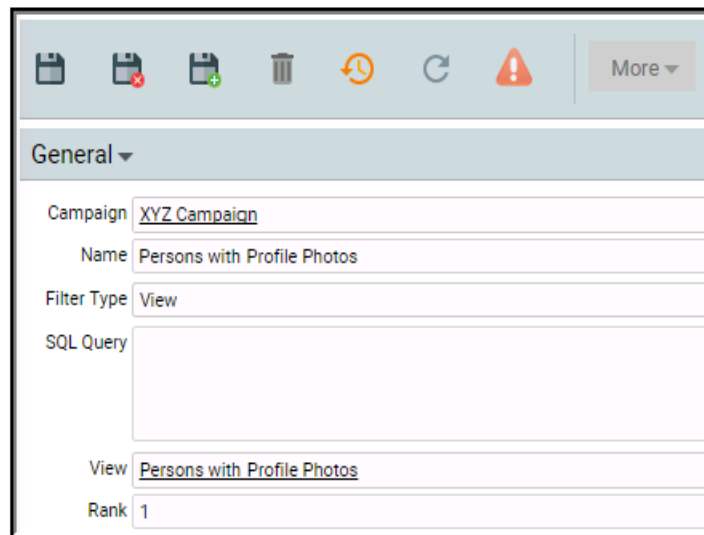
NEW EDIT DELETE [Sort Icons]

	PRODUCT	TYPE	DISCOUNT AMOU...	DISCOUNT %	AMOUNT	MEMBER TYPE
<input type="checkbox"/>	XYZ Product	Discount %	0.00	20	0.00	Member
<input type="checkbox"/>	XYZ Product	Discount %	0.00	10	0.00	Non-Member

Creating a Campaign Segment

An organization can use Campaign Segments to identify the target audiences for a marketing effort targeting multiple groups. In this exercise, you will create a Campaign Segment for the XYZ Product Launch Campaign targeting the persons in a view.

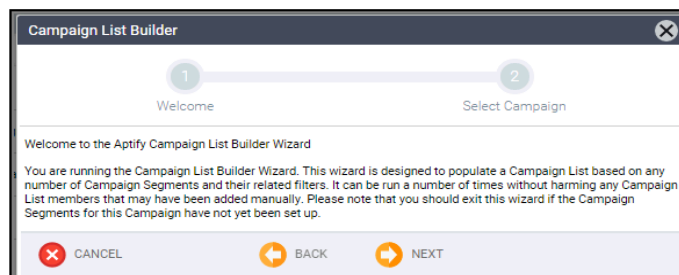
1. From the **XYZ Campaign** record, click the **Segments** section.
2. Click the **New** button.
3. In the **Campaign** field, **XYZ Campaign** defaults.
4. In the **Name** field **Persons with Profile Photos**.
5. From the **Filter Type** drop-down menu, select **View**.
6. In the **View** field, enter the view name, **Persons with Profile Photos**
7. In the **Rank** field, enter **1**.



The screenshot shows a form for creating a Campaign Segment. At the top, there is a toolbar with icons for save, delete, refresh, and a warning sign, along with a 'More' dropdown menu. Below the toolbar is a 'General' section with the following fields:

- Campaign:** XYZ Campaign
- Name:** Persons with Profile Photos
- Filter Type:** View
- SQL Query:** (empty)
- View:** Persons with Profile Photos
- Rank:** 1

8. **Save + Close** the record.
9. Return to the **Campaign Dashboard**
10. Click on the **More** button from the **All In Progress Campaigns** view.
11. Select **Campaign List Builder**.



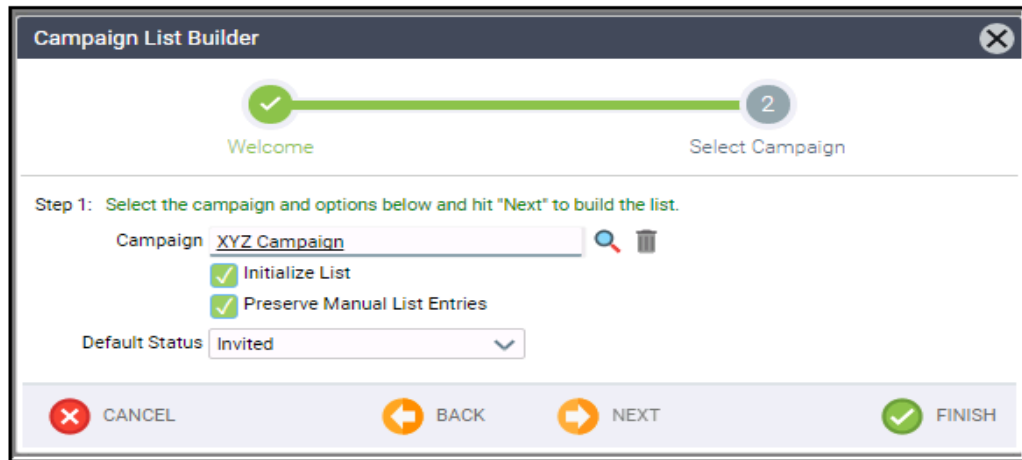
The screenshot shows the Campaign List Builder wizard. It has a progress bar at the top with two steps: 1. Welcome and 2. Select Campaign. Below the progress bar, there is a welcome message and instructions:

Welcome to the Aptify Campaign List Builder Wizard

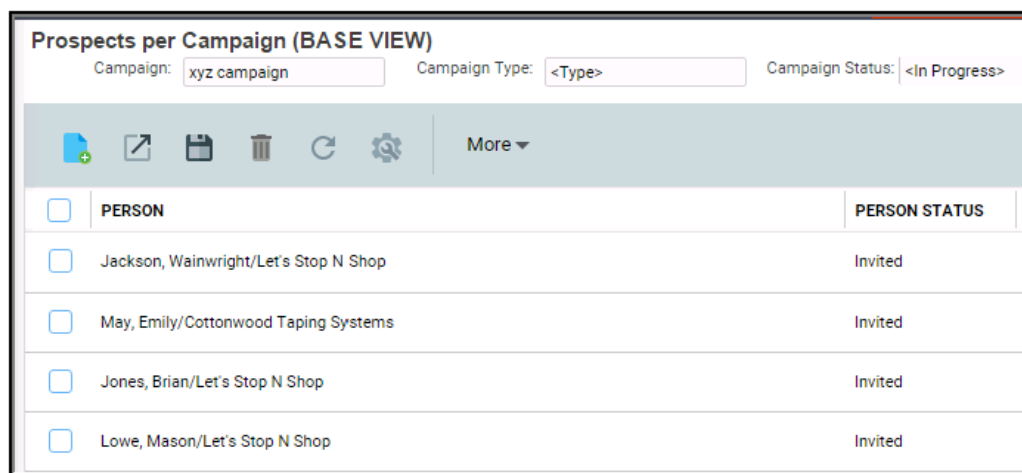
You are running the Campaign List Builder Wizard. This wizard is designed to populate a Campaign List based on any number of Campaign Segments and their related filters. It can be run a number of times without harming any Campaign List members that may have been added manually. Please note that you should exit this wizard if the Campaign Segments for this Campaign have not yet been set up.

At the bottom, there are three buttons: CANCEL, BACK, and NEXT.

12. Click the **Next** button.
13. Enter **XYZ Campaign** in the **Campaign** field.
14. Keep **Initialize List** and **Preserve Manual Entries** checked.
15. Keep the **Default Status** as **Invited**.



16. Click the **Finish** button.
17. From **Quick Search** find and run the **Prospects per Campaign (BASE VIEW)**.
18. In the **Campaign** prompt enter **XYZ Campaign**.
19. Click **GO**.
20. Observe the entries added from the **Campaign List Builder**.

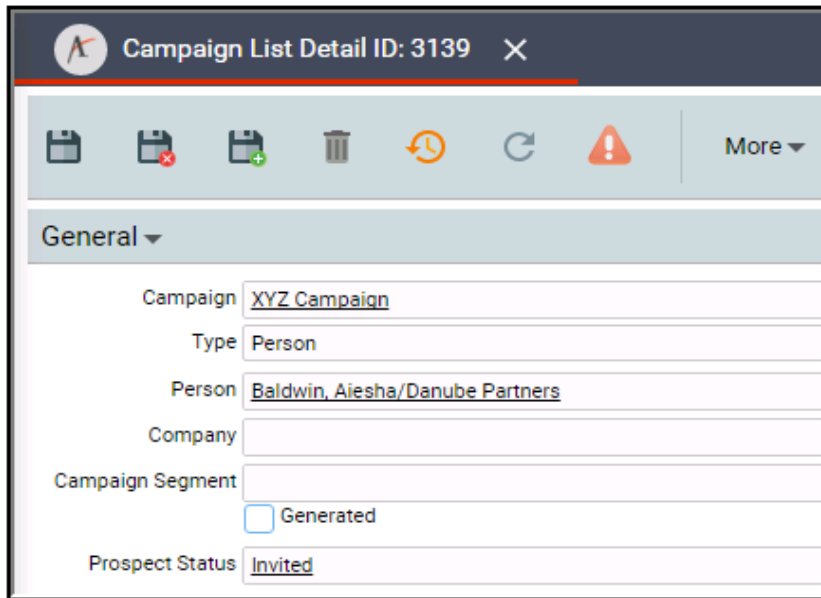


Adding Prospects to a Campaign

Prospects can also be added to Campaigns by the Prospect List section or directly from a View without using Segments.

Adding Prospects from a Campaign

1. Open the *XYZ Campaign* record (if not already open).
2. Select the **Prospect List** section.
3. Click the **New Record** button to open a new **Campaign List Detail** record.
4. From the **Type** drop-down menu, select **Person**.
5. In the **Person** field, enter **Aissha Baldwin** record (ID 01).
6. The **Prospect Status** field should default to **Invited**.
 - After a Person has responded to the marketing offer a user could use an Entity Bulk Operation from a View of Prospects to update the Prospect Status.



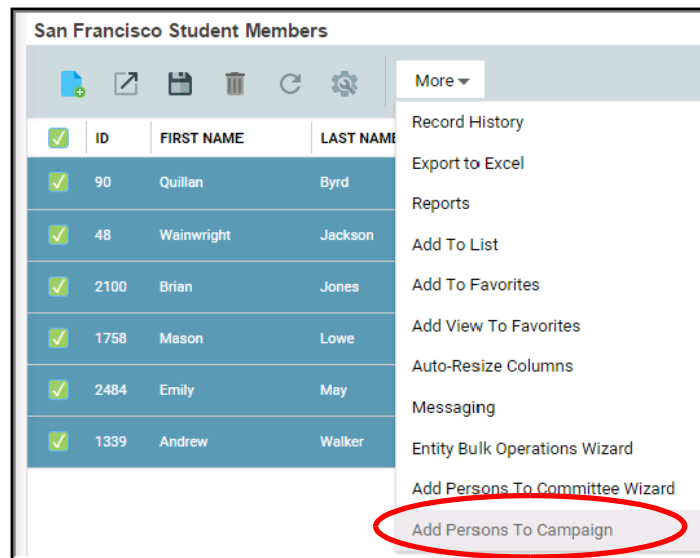
The screenshot shows a web application interface for a 'Campaign List Detail' record with ID 3139. The record is under the 'General' section. The fields are as follows:

Field	Value
Campaign	XYZ Campaign
Type	Person
Person	Baldwin, Aiesha/Danube Partners
Company	
Campaign Segment	
Generated	<input type="checkbox"/>
Prospect Status	Invited

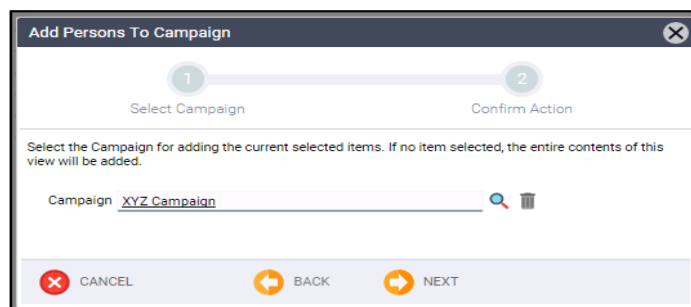
7. Click the **Save and New** button
8. This Opens a 2nd **Campaign List Detail** record from the **Campaign's Prospect List** tab.
9. From the **Type** drop-down menu in the second row, select **Company**.
10. In the **Company** field, enter record **01** and select for **Danube Partners**.
 - Any **Persons** associated with **Danube Partners** can now respond to the Invitation Only campaign.
11. Ensure that the **Prospect Status** field is **Invited**.
12. Click **Save**.

Adding Prospects from a view

1. From the **Quick Search**, find and open your **San Francisco Student Members** view.
2. Check the upper left-**most check box (Select All box)**.
3. Click the **More** drop-down button.
4. Select **Add Persons to Campaign**.



5. In the Campaign field, enter the **XYZ Campaign**.
6. Click the **Next** button.
 - A message will indicate how many records will be added to the campaign



7. From the second screen, click the **Finish** button.
8. From **Quick Search** find and run the **Prospects per Campaign (BASE VIEW)**.
9. In the **Campaign** prompt enter **XYZ Campaign**.
10. Click **GO**.
11. Observe the entries added from the **Add to Persons to Campaign** wizard.

Applying Campaigns to Orders

Applying a Campaign to an Entire Order

In this exercise, users will learn how to apply a campaign to an entire order and to each individual item in an order.

1. Find and Open **Aiesha Baldwin's** record.
2. From the Landing page click **Actions - Create Order** button.
 - Note: Campaign pricing can only be used for a designated prospect since the XYZ Campaign's **Invitation Only** box was checked.
3. In the **Campaign** field, enter **XYZ Campaign**.
 - When applying a single campaign to an entire order, the Campaign **MUST** be entered first, before adding products to the order.
4. Enter **XYZ Product** to the **Order Line**, click **Add**.

The screenshot displays the CRM Order Entry interface. The 'Customer' dropdown is set to 'Baldwin, Aiesha/Danube Partners'. The 'Order Date' is 01/19/2016 and the 'Order Party' is 'Company'. The 'Ship To' and 'Bill To' addresses are both 'Baldwin, Aiesha/Danube Partners', with 'Danube Partners' as the company. The 'Billing Same as Shipping' checkbox is checked. The 'Campaign' field is set to 'XYZ Campaign'. The 'Ship Type' is 'U.S. Mail' and the 'Order Source' is 'Walk-In'. The 'Order Addresses' section shows 'Ship To Address' as '910 Southwest Union Avenue', Palo Alto, CA 94301, Santa Clara, United States. The 'Ship To Phone' is (650) 750-9187. The 'Order Lines' table shows one line item: 'XYZ Product (ID: 9922)' with a quantity of 1, a price of \$100.00, a discount of 20.00%, and an extended price of \$80.00.

Find Product...	Quantity	Qty Avail:	ADD	CLEAR SEARCH
XYZ Product (ID: 9922)	1			
Description	Quantity	Price	Discount	Extended
	1	\$100.00	20.00%	\$80.00

5. Observe the **Discount** percentage applied.
6. On the **Payment** tab, enter payment information.
7. **Finish** and **Ship** the Order.
8. From **Quick Search** find and run the **Orders per Campaign** view.
 - A Base View is used so that Campaigns, Orders, and Order Lines information will display. This is important for capturing both Campaigns applied at the Order Level AND the Order Line level which will be done in the next exercise.
9. Observe the results - there should be one order for Aiesha Baldwin listed.

Applying a Campaign to an Order Line

1. Create another order from Luke Tate's Persons record (ID 343).
2. Luke Tate meets BOTH criteria for receiving the discount:
 - He is on the invited Prospect List via having Danube Partners as a company.
 - He has Non-Member status and will receive a 10% discount.
3. Enter the **XYZ Product** in **Find Product**.
4. Leave the Quantity as 1, click **Add**.
5. On the right side of the Order Line, click **Open**.

XYZ Product (ID: 9922)	Description	Quantity	Price	Discount	Extended
		1	\$100.00	0.00 %	\$100.00

6. Enter **XYZ Campaign** in the **Campaign Code** field.

Order Lines record

Extended

Quantity: 1 Price: \$100.00 Discount: 20

Inventory Location: XYZ Organization/XYZ Warehouse

Not Returned To Stock

Campaign Code: XYZ Campaign

Chapter: [Search]

Allow Description Override Discount Overridden

Description: [Text Area]

OK CANCEL

7. Click **OK**.
8. Click **OK** to return to the order.
9. Enter **Payment** information.
10. **Ship and Close** the order.
11. From **Quick Search** find and run the **Orders per Campaign (BASE VIEW)** view.
12. Observe the results - there should be two orders listed.

Campaign Views

1. From the **Quick Search**, enter and find the **Orders per Campaign (BASE VIEW)**.
2. Enter the **XYZ Campaign** you just created in the **Campaign Name** prompt.
3. Observe the **Results**.
 - Base View - results show fields from Persons, Orders, and Campaign services.

<input type="checkbox"/>	CAMPAIGN CODE NAME	ID	ORDER DATE	TOTAL	SHIPTOCOMPANY	SHIPTONAME	SHIP TO ADDR LINE 1
<input type="checkbox"/>	XYZ Campaign	10132	01/13/2016	\$80.00	Danube Partners	Aiesha Baldwin	910 Southwest Union Avenue
COUNT: 1				SUM: 80.00			

1. From the **Quick Search**, enter and find the **Prospects per Campaign (BASE VIEW)**.
2. Enter the **XYZ Campaign** you just created in the **Campaign** prompt.
3. Observe the **Results**.
 - Base View - results show fields from Persons, Orders, and Campaign services.

<input type="checkbox"/>	PERSON	PERSON STA...	CAMPAIGN START D...	CAMPAIGN END DATE	CAMPAIGN STA...
<input type="checkbox"/>	Wade, Alexandra/U. Hardwick Physics AB	Invited	08/05/2014		In-Progress
<input type="checkbox"/>	Baldwin, Aiesha/Danube Partners	Invited	08/05/2014		In-Progress

Objective.....	14.1
Using the New Meeting Wizard	14.2
Creating Meeting Registrations	14.10
Placing a Person on the Waiting List.....	14.12
Cancelling a Registration.....	14.13
Transferring a Meeting Registration.....	14.15
Closing a Meeting.....	14.17
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Objective

The Meetings function enables users to track meetings, meeting sessions and meeting registrants. After completing this lab, you will be able to:

- Copy an existing Meeting using the **New Meeting Wizard**
- Understand the parts of the **Meeting** record
- **Order** a meeting and register additional attendees on an order
- View all meeting **Registrants**
- Close a meeting and track **Attendees**

Overview

“Extended” product type

- Supports Meeting-specific features in addition to the General Product features
- Same setup and configuration as a standard Product
- Meetings use a Products record that includes an additional **Meeting** tab

Tracks meeting registrants, attendees, and additional information about the meeting

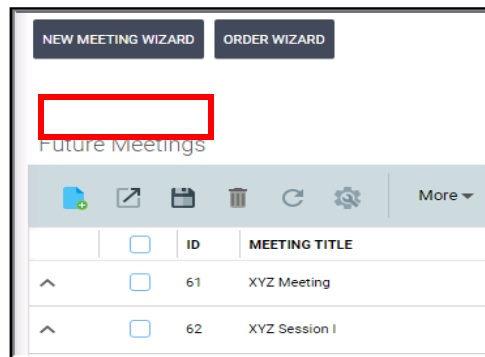
- Uses Aptify Inventory system to manage meetings with limited space
- Nearby hotels for attendees
- Meeting Location
- Required resources (such as audio/visual equipment)
- Sessions

Using the New Meeting Wizard

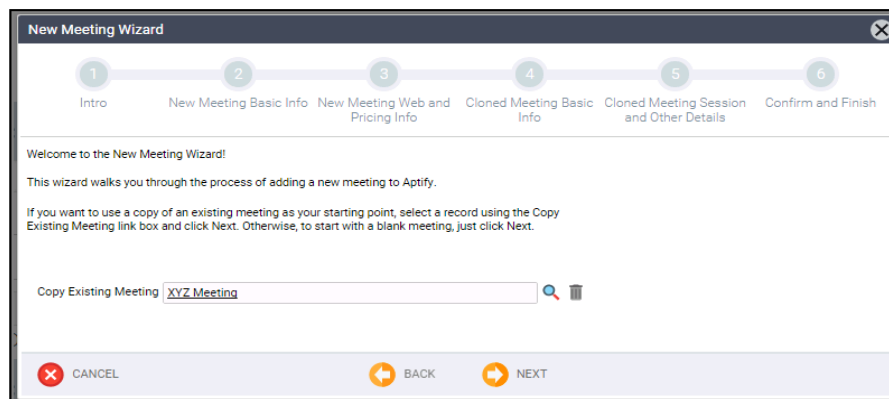
The New Meeting Wizard enables users to create a new meeting by copying elements of an existing meeting. This can save valuable time as Meeting coordinators often have similar meetings scheduled throughout the year. During the copy process, users can copy and then adjust details such as dates, time, speakers, location, etc.

This exercise will use the **New Meeting Wizard** to copy an existing XYZ Meeting and make modifications to make it unique.

1. Click the **Meeting Management** dashboard.
2. Click the **New Meeting Wizard** button.



3. The first screen of the **Meeting Wizard** will display.
4. In the Copy **Existing Meeting** field, enter **XYZ Meeting** (exactly; do not substitute xyz for your initials).



5. Click the **Next** button.

6. The second screen of the New Meeting Wizard displays.
 - On this screen users can edit the basic information concerning the meeting such as the name, date, coordinator, etc.
7. Edit the **New Product Name** field by overwriting XYZ with your initials plus the word Meeting (i.e. DOC Meeting).
8. Do not Click to the **Web Enabled** checkbox. This enables the users of ebusiness to see and order the meeting - it should be the last task done in setting up a meeting.
9. Keep **3** the **Max Registrants** field.
 - If limited number of registratons is allowed - enter that number here.
 - If registrations are unlimited, zero remains in this field..
10. Change the **Start Date and Time** to next week on Monday.
 - The year should automatically have defaulted to the current year.
 - IGNORE the dates in the screenshot; these are just placeholders
11. Change the **End Date and Time** to next week on Friday.
12. Click the **Next** button.

The screenshot shows the 'New Meeting Wizard' window at step 4, 'Cloned Meeting Basic Info'. The progress bar at the top indicates steps 1 through 6, with step 4 currently active. The form contains the following fields and options:

- New Product Name:** XYZ Meeting. A checkbox labeled 'Other Names Same As Product Name' is checked.
- New Meeting Name:** XYZ Meeting
- Category:** Meetings
- Parent Meeting:** (empty)
- Meeting Type:** (empty)
- Web Name:** XYZ Meeting. A checkbox labeled 'WebEnabled' is unchecked.
- Meeting Conflict Type:** No Conflict Validation (dropdown)
- Max Registrants:** 3
- Meeting Dates:**
 - Start Date and Time:** 12/07/2016 (dropdown)
 - End Date and Time:** 12/11/2016 (dropdown)
 - Registration Opens:** 01/01/1900 (dropdown)
 - Registration Closes:** 01/01/1900 (dropdown)
 - Rev. Rec. Date:** 01/01/1900 (dropdown)
- Coordinator:** John Samuels
- Organization:** (empty)
- Committee:** (empty)
- Linked Expo:** (empty)
- Description:** (empty text area)

At the bottom of the window, there are three buttons: CANCEL (with a red X icon), BACK (with a left arrow icon), and NEXT (with a right arrow icon).

13. The third screen of the New Meeting Wizard displays.
 - This screen enables users to decide whether to copy the originating Meeting's Logistics such as Location, Sessions, Sponsors, Education Units, etc.
14. Leave the information intact.

New Meeting Wizard

Intro New Meeting Basic Info New Meeting Web and Pricing Info Cloned Meeting Basic Info **5** Cloned Meeting Session and Other Details 6

The wizard will copy the specified information from the existing meeting to the new meeting for each item that is checked below. For example, if you leave Topic Codes checked, the Topic Codes selected on the original meeting will be copied to the new meeting.

Speakers Hotels Education Units Pricing/Prerequisites Attributes
 Resources Sponsors Topics Codes Accounting

If the meeting you entered has any sessions, those sessions will appear in the grid below. Remove the check mark from any session that you do not want to copy. For sessions that you do want to copy, you can modify the Meeting Title and dates directly within the grid or double-click to open a form. Note that the wizard will copy information from the original session to the new session based on the options you checked above.

	SELECTED	MEETING TITLE	SESSION START DATE	SESSION END DATE
XYZ Session I	<input checked="" type="checkbox"/>	XYZ Session I	12/07/2016 12:00:00 PM	12/07/2016 01:00:00 PM
XYZ Session II	<input checked="" type="checkbox"/>	XYZ Session II	12/08/2016 02:00:00 PM	12/08/2016 03:00:00 PM

15. In the sessions **Meeting Title** column, double-click the **XYZ Session I** meeting title.
16. Observe that the basic information could be edited for the **Session** at this time.
 - Dates have automatically adjusted based on date choices for screen #2.

Meeting Cloning Wizard Sessions record

Meeting Title: XYZ Session I

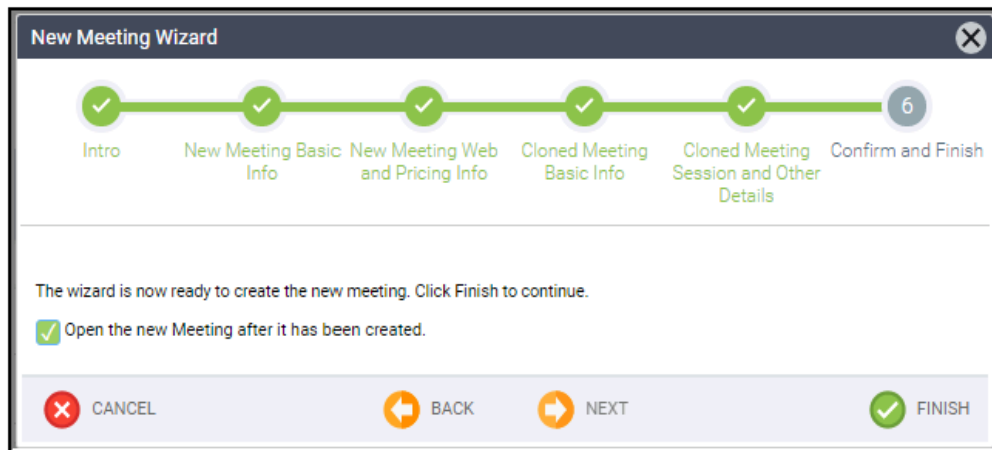
Session Start Date: 12/07/2016 12:00:00 PM

Session End Date: 12/07/2016 01:00:00 PM

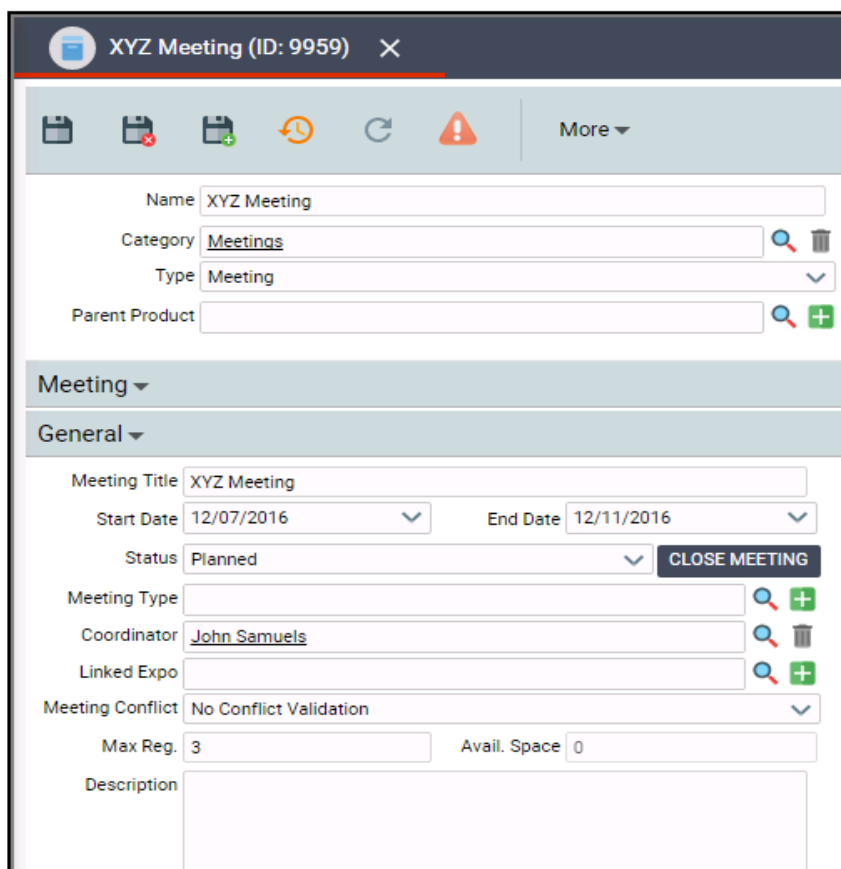
Meeting ID: XYZ Session I

17. Click **OK**.
18. Click the **Next** button.

19. A message displays that the wizard is ready to create the new meeting.
20. Select the checkbox to **Open the New Meeting record after it has been created.**
21. Click **Finish.**



22. The finished **Meeting** Product record should now display - if it does not, open it from the **Future Meetings** view of the **Meeting Management** dashboard.
23. Observe the changes to the **Name** and **Date(s)** that were made in the wizard.



24. From the **General** drop-down, click the **Meeting Logistics>Location** section.
 - The **Meeting Logistics** section stores information specifically to this Meeting.
25. Observe the **Location** tab information.
 - This section displays information about the meeting location and can include room information.
 - Venue/Room records can be created/saved for easy loading of details.

26. Click the **Meetings > Sessions > List** tab.
27. The two sessions that carried over from the Wizard are available.
28. Double-click the **XYZ Session I** record and change the **Product Name** and **Meeting Name** to your initials.
29. **Save** and **Close** the record.
30. Double-click the **XYZ Session II** record and change the **Product Name** and **Meeting Name** to your initials.
31. **Save** and **Close** the record.

ID	MEETING TITLE	START DATE	END DATE
62	XYZ Session I	12/07/2016 12:00:00 PM	12/07/2016 01:00:00 PM
63	XYZ Session II	12/08/2016 02:00:00 PM	12/08/2016 03:00:00 PM

32. Click the **Speakers** tab
33. The **Speaker** that was designated on the original record displays.

Meeting Logistics > Speakers ▾				
NEW EDIT DELETE ↑ ↓				
	SPEAKER	STATUS	TYPE	TITLE
<input type="checkbox"/>	Yukon, Dacey/Polyhe... Power Devices	Accepted	Regular	Speaker

34. Double click the **Speakers** record.
35. Change the **Start Date** to next **Monday at 9:00 AM**.
36. Change the **End Date** to next **Monday at 11:00 AM**.
37. Click the **OK** button.

Speakers record ✕

General ▾

Speaker 🔍 🗑️

Status ▾

Type ▾

Title

Description

Start Date ▾

End Date ▾

Evaluation ▾

Content Quality ▾

Speaker Quality ▾

Cost

Date Rejection Sent ▾

Reimburse Speaker

Max Expenses





38. Click the **Sponsors** tab.

39. **Sponsors** can be added, edited, and deleted as needed.

Meeting Logistics > Sponsors ▾			
NEW EDIT DELETE    			
	SPONSOR	CONTACT	AMOUNT
<input type="checkbox"/>	Ottoman	Lambert, Baka/Ottoman	1000





40. Click the **Hotels** tab

41. **Hotels** and locations, offers and directions can be added, edited, and deleted as needed.

Meeting Logistics > Hotels ▾			
NEW EDIT DELETE    			
	HOTEL	SPECIAL OFFERING	OFFER STA... OFFER END...
<input type="checkbox"/>	Marriot - Marathon Key	20 % off total stay	12/07/2016 12/07/2016

42. Click the **Resources** tab.

43. **Resources** and types, quantity, start/end dates can be added, edited, & deleted as needed.

Meeting Logistics > Resources ▾					
NEW EDIT DELETE    					
	RESOURCE	CHECKED	DOUBLE CHECKED	QUANTITY	START DA... END DATE
<input type="checkbox"/>	Podium	<input type="checkbox"/>	<input type="checkbox"/>	1	12/07/2016 12/11/2016
<input type="checkbox"/>	White Board	<input type="checkbox"/>	<input type="checkbox"/>	1	12/07/2016 12/11/2016

44. Click the **Education Units** tab.

45. **Education Categories** can be set up to track how many **Continuing Education Units** an attendee will receive for attending a particular meeting.

Meeting Logistics > Education Units					
<input type="button" value="NEW"/> <input type="button" value="EDIT"/> <input type="button" value="DELETE"/> <input type="button" value="↕"/> <input type="button" value="↑"/> <input type="button" value="↓"/>					
	EDUCATION CATEGORY	EDUCATION CATEGORY STATUS	PRL...	EDUCATION UNITS	CE TYPE
<input type="checkbox"/>	Continuing Education Units	Active		2	Education Unit

46. Double click the **Continuing Education Units** line.
47. The **Meeting Education Units Record** displays.
48. These records can be added and edited to fit the class requirements. Units can also be tied to a specific Education module curriculum and administer credit towards the fulfillment of a curriculum if so designated.

Meeting Education Units record ✕

CE Type: ▼

Education Category: 🔍 🗑️

Primary Function: 🔍 +

Education Units:

Certifications

If tracking CE units as Certifications in Aptify Education Management, select the Type and enter the corresponding Requirement (Course) or Curriculum to which these units will apply.

Certification Type: ▼

Requirement: 🔍 +

Curriculum: 🔍 +

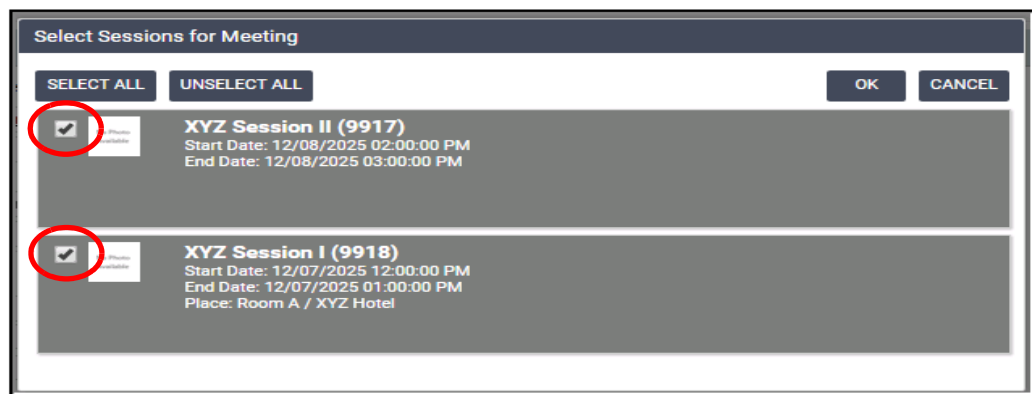
Title:

49. Once a student is marked as **Attended** (But not just as Registered) for this meeting he or she will automatically receive the designated number of credits.
50. On the **Meeting Education Units** record, Click **OK**.
51. **Save and Close** the Meeting record.

Creating Meeting Registrations

Registering for a meeting is the same as ordering any other product. In this exercise three separate individuals for the XYZ Meeting will be registered by creating three separate order lines for the XYZ Meeting product.

1. Open your **Persons** record.
2. From **Actions**, click on **Create Order**.
3. Add your **XYZ Meeting** to the Order Line.
4. A pop up window will display with **Registration** and **Session** information.
5. Select the box next to both **XYZ Session I AND XYZ Session II**.
6. Click the **OK** button.



7. Open the **Order Line** the **XYZ Meeting**.
8. Change the **Registrant** to ID 02 - **Alexandra Wade**.
9. Click **OK** to close the Order Line.
10. **Repeat** steps 7-8 for both **XYZ Session I** and **XYZ Session II**.

Find Product...	Quantity	Qty Avail:	ADD	CLEAR SEARCH	DELETE ALL	
XYZ Meeting (ID: 9916)	Attendee: Wade, Alexandra/U. Hardwick Physics AB	Quantity 1	Price \$100.00	Discount 0.00 %	Extended \$100.00	
XYZ Session II (ID: 9917)	Attendee: Wade, Alexandra/U. Hardwick Physics AB	Quantity 1	Price \$50.00	Discount 0.00 %	Extended \$50.00	
XYZ Session I (ID: 9918)	Attendee: Wade, Alexandra/U. Hardwick Physics AB	Quantity 1	Price \$125.00	Discount 0.00 %	Extended \$125.00	

11. Add the **XYZ Meeting** to Order Lines again.
12. This time, do **NOT** order any of the sessions - just close the popup.
13. Open the new **Order line** for the **XYZ Meeting**.
14. Change the **Registrant** to ID 03 - **Athena Scott**.
15. Click **OK** to close the Order Line.

16. Add the **XYZ Meeting** to Order Lines for a third time.
17. Again, do **NOT** order any of the sessions - just close the popup.
18. Do NOT Open the new **Order line** for the **XYZ Meeting** - this registration will remain for Aiesha Baldwin.
19. Enter **Payment** information.
20. **Save** the Order.
21. Change the **Status** to **Shipped**.
22. **Save and Close** the Order.

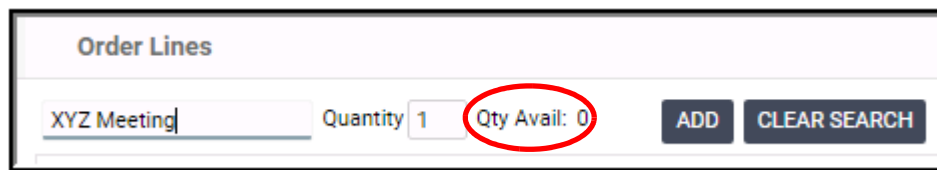
Note: When taking an order for multiple registrants AND when the originating person is seeking to be registered as well, that person **MUST** be registered last, or the system will overwrite the first registration line(s).

23. From **Quick Search**, find and open the **Find Meeting Registrant (BASE VIEW)**.
24. Enter **XYZ Meeting** in the **Meeting Name** prompt.
25. Click **GO**.
26. Observe the **Registrants** for your XYZ Meeting.

Placing a Person on the Waiting List

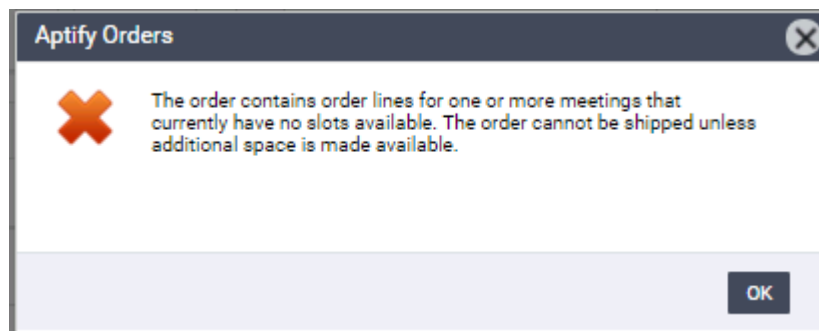
Normally a meeting would have many slots available. This example meeting had a maximum of three registrants in order to see the result of someone registering for a meeting that has exceeded its maximum number.

1. Open new order for **Baka Lambert's (ID 04)** - use **Quick Search** to find.
2. Put the **XYZ Meeting** in Find Product - but don't ADD before observing the Qty Avail:.
3. It should be 0.



4. Click **ADD**.
5. Enter **Payment** information.
6. Click **Save**.
7. Close the record - Baka Lambert was automatically added to the **Wait List**.
8. From **Quick Search**, find and open the **Find Meeting Registrant (BASE VIEW)**.
9. Enter **XYZ Meeting** in the **Meeting Name** prompt.
10. Click **GO**.
11. Observe that **Baka Lambert** is listed with a status of **Waiting** for the **XYZ Meeting**.

Note: If the user tries to change the Order Status to **Shipped** and **Save and Close** the Order, they would receive the following message:



IF this message is received, the user should close out of the order and select **Discard** when the "Do you wish to Save" pop-up comes up. Even though Discard is chosen, the order will be saved in the **Taken** status AND the user will be placed on the **Wait List**.

Cancelling a Registration

The **Order Cancellation wizard** can be used to cancel orders that have one or more meeting registrations. In this exercise, users will employ the wizard to cancel a person ordered on Aiesha Baldiwin's order taken previously.

1. Click on the **Home** Dashboard.
2. From the **Today's Orders** view, select the XYZ Meeting order by Aiesha Baldwin.
3. Click the **More** dropdown.
4. Select the **Order Cancellation Wizard**.
5. Enter the **Cancellation Reason**.
6. Click **Next**.
7. The Cancellation wizard displays all order lines.
8. Scroll down to the order line for **Athena Scott** (should be **line 4**).
9. Click on the left-hand checkbox.
10. Click **Next** to continue.

Order Cancellation Wizard

Intro Select Original Order **Select Order Lines** Select Refund or Credit Complete Cancellation

Step 3: Specify Order Lines
Please specify one or more of OrderLines to cancel. Also, indicate the quantity which should be cancelled. To see order line details, double click on the desired row.

Check All Check None

SELECTED	LINE	PRODUCT ...	PRODUCT	DESCRIPT...	EXTENDED	QUANTITY	CANCEL QUANTITY
<input checked="" type="checkbox"/>	4	9916	XYZ Meeting	Registration for Athena Scott	\$100.00	1	1

1 - 5 of 5 items

Return Shipping Charge
 Include Cancellation Fee Product

Product

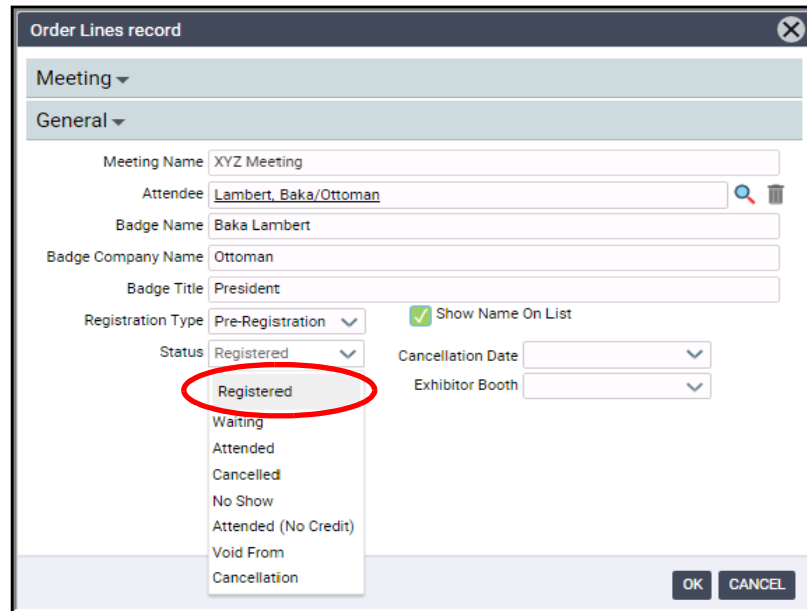
Fee \$0.00

11. Select **Keep On Account**.
12. Click **Next**.
13. Check the **Review The Created Cancellation Order** box.
14. Click **Finish** to generate the cancellation order.
15. Change the **Order Status** to **Shipped**.
 - Order must be shipped finalize the transaction.
 - Will make registration spot available for meeting.
16. **Save** and **Close** the cancellation order.

Moving a Person from Wait List to Registered

This process is not automated in Aptify.

1. From **Today's Orders** view, open the **Order** for **Baka Lambert** of **XYZ Meeting**.
2. Open the order line for the **XYZ Meeting**.
3. Change the **Status** from **Waiting** to **Registered**.



The screenshot shows the 'Order Lines record' window. The 'Status' dropdown menu is open, and the 'Registered' option is highlighted with a red circle. The window displays the following information:

- Meeting Name: XYZ Meeting
- Attendee: Lambert, Baka/Ottoman
- Badge Name: Baka Lambert
- Badge Company Name: Ottoman
- Badge Title: President
- Registration Type: Pre-Registration
- Status: Registered (highlighted)
- Registration Type: Pre-Registration
- Show Name On List:
- Cancellation Date: [Dropdown]
- Exhibitor Booth: [Dropdown]

4. Click **OK**.
5. In the **Payments and Summary** area, change the **Order Status** from **Taken** to **Shipped**.
6. Click **Yes** when asked if all items have been shipped.
7. **Save and Close** the record.
8. From **Quick Search**, find and open the **Find Meeting Registrant (BASE VIEW)**.
9. Enter **XYZ Meeting** in the **Meeting Name** prompt.
10. Click **GO**.
11. Observe that **Baka Lambert** is listed with a status of **Registered** and **Athena Scott** is listed with a status of **Cancelled** for the **XYZ Meeting**.

Transferring a Meeting Registration

The meeting transfer wizard is able to perform two functions for an existing meeting registration. It can substitute a different person for the same meeting, or it can transfer a person's existing meeting registration to a different meeting.

- The wizard is available for orders in either a **Taken** or **Shipped** status
 - For Shipped Orders, the process creates a cancellation order and then a new transfer order
1. Create an **Order** for the **Golf Tournament (ID 9927)** for **Hannah Taylor (ID 09)**.
 2. **Save** and **Ship** the Order.
 3. Click on the **Meeting Management** dashboard.
 4. From the **Future Meetings** view, click the **More** button.
 5. Select the **Meeting Transfer Wizard**.
 6. Enter **Hannah Taylor's** name in the **Persons** field.
 7. Enter the **Golf Tournament (ID 9927)** in the **Meeting** field.

Note: If you remember the **Order ID**, you can put that in the Order field without filling out the Person or Meeting fields.

Meeting Transfer Wizard

1 Identify the Registration to Modify 2 Transfer Details 3 Review Transfer Details 4 Payment Reconciliation 5 Transfer Completed

This wizard performs two functions for an existing meeting registration. It can substitute a different person for the same meeting, or it can transfer a registration to a different meeting.

Step 1: Identify the Registration to Modify

Enter the person and meeting in the fields provided to locate the order that contains the registration to modify. Or, if you already know the ID of the Order, enter that ID in the field provided.

Person

Meeting

Order

CANCEL BACK NEXT

8. Click the **Next** button.

9. Select the **Line 1** box.

10. Click on the **New Attendee** column.

11. Click on the **grey box** that displays.

12. Enter **Aiesha Baldwin** (ID 01) in the **Find Persons record** popup.

13. Click **Next**.

14. Review the item selected - users could go back to modify choices at this step.

15. Click **Next**.

16. Review the **Advanced Settings/Payment Reconciliation** screen.

- Users could select a Transfer Fee to apply
- Users could change the Payment Type or Keep on Account

Original Order		Transfer Order	
Total	\$85.00	Total	\$85.00
Balance	\$0.00	Balance	\$0.00

17. Click **Next**.

18. Click **Finish**.

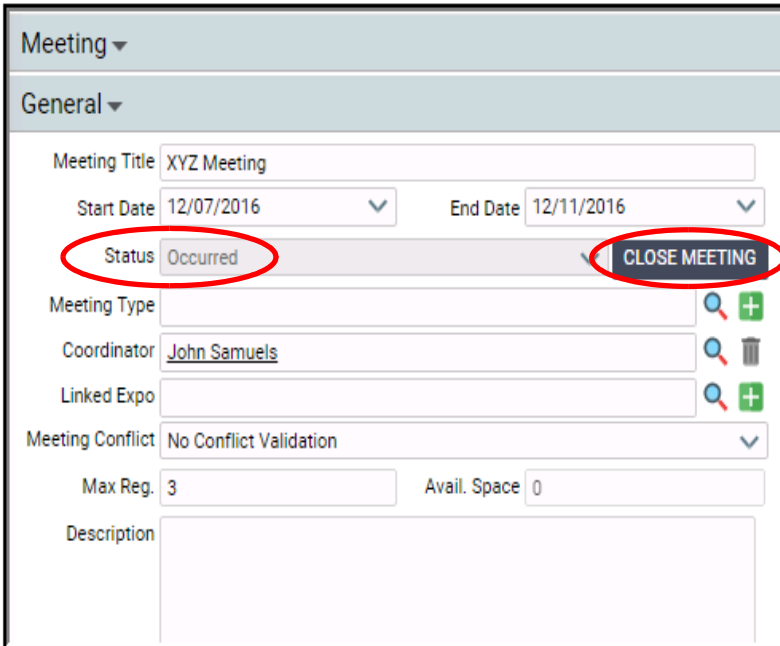
19. Click **Yes** at next 2 **Ship** screens; user shipping both **Transfer** and **Cancellation** Orders.

20. Click **No** to Transfer another Person.

Closing a Meeting

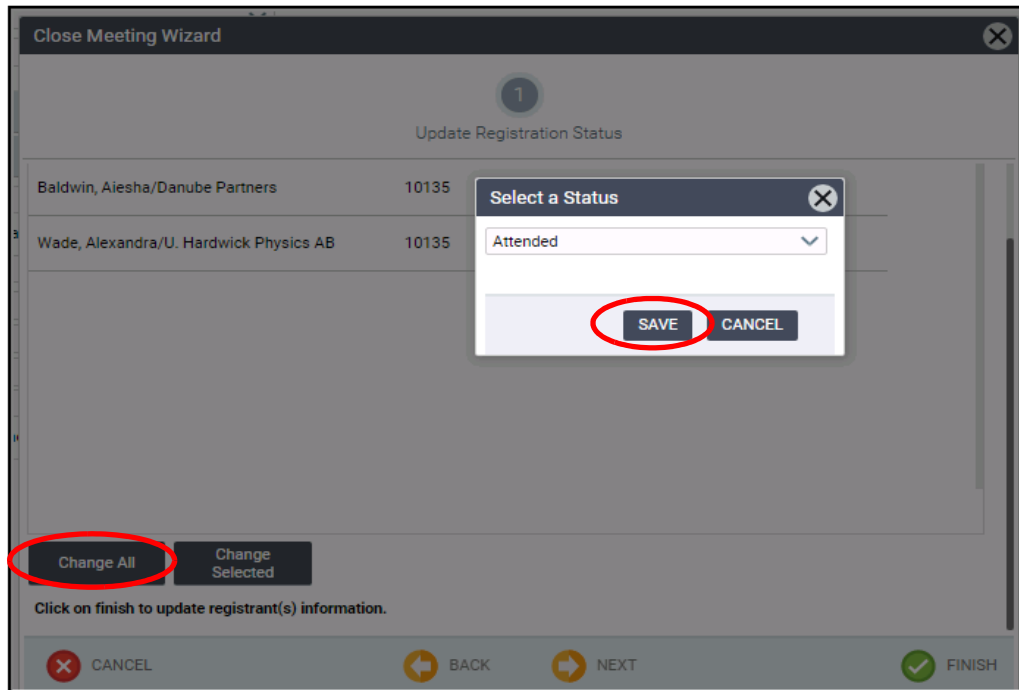
After a meeting's completion, it is important to change the Status to Occurred and Closed for participants to receive education credits and accounting functions for the meeting to be actualized.

1. Open the **Meetings** record (if not already opened).
2. Select the **Meetings** tab and select the **General** sub-tab (if necessary).
3. Change the **Status** from **Planned** to **Occurred**.
4. Click the **Close Meeting** button.



The screenshot displays the 'Meeting' record interface, specifically the 'General' sub-tab. The 'Meeting Title' is 'XYZ Meeting'. The 'Start Date' is '12/07/2016' and the 'End Date' is '12/11/2016'. The 'Status' dropdown menu is currently set to 'Occurred', and the 'CLOSE MEETING' button is highlighted with a red circle. Other fields include 'Meeting Type', 'Coordinator' (John Samuels), 'Linked Expo', 'Meeting Conflict' (No Conflict Validation), 'Max Reg.' (3), 'Avail. Space' (0), and a 'Description' field.

5. From the **Filter** drop-down menu, select **Registered**.
 - This displays only the meeting's Registrants.
6. For the first entry, click the **Status** field and from the drop-down menu select **Attended**.
7. You can use this method to change the Status for each Person individually. Click the **Change All** button.
8. From the **Status** drop-down menu, select **Attended**.



9. Click **OK**.
 - The **Status** changes to **Attended** for all Persons in the list.
 - Education credits assigned are saved to attendees' records.
10. Click **OK** to close the **Close Meeting Wizard**.
11. Click **OK** to update all **Registrant** information.
12. Select the **Attendees** tab.
 - Confirm that all three registrants are now listed under the Attendees tab.
13. Click **Save and Close** to close the **Meetings** record.

Meeting Views

From the **Quick Search**, enter the text **Find Meeting**.







Several selections will display:

Find Meeting - Brings back a list of Meetings and details by prompted value. Used for counts of Registrants, Wait List, Cancelled, No Show, etc.

Find Meeting Registrant Info (BASE VIEW) - Brings back a list of Meeting Registrants and details by prompted value with the focus on Persons information.

Find Meeting Registrant \$ (BASE VIEW) - Brings back a list of Meeting Registrants per Meeting and the revenue generated.

1. From the **Quick Search**, enter and run the **Find Meeting Registrant (BASE VIEW)**.
2. Enter **XYZ** in the **Meeting Name** prompt.
3. Observe the **Results**.
 - Enables users to filter and view registrants by Attendee Status so users can track Wait Listed registrants, Attendees, Cancellations, etc.
 - As Base View - results show fields from Persons, Meetings, Orders, and Registration services.

Find Meeting Registrant (BASE VIEW)						
Meeting Name: XYZ Meeting		Attendee Status: <Attendee Status>		Last, First Name: <Last, First Name>		
<div style="display: flex; justify-content: space-between; align-items: center;"> <div>       </div> <div>More ▾</div> </div>						
<input type="checkbox"/>	BADGE NAME	BADGE TITLE	ATTENDEE STATUS...	MEETING NAME	PHONE AREA ...	PHONE
<input type="checkbox"/>	Baka Lambert	President	Waiting	XYZ Meeting	803	736-2931
<input type="checkbox"/>	Athena Scott	Marketing VP	Void From Cancellation	XYZ Meeting	916	491-3204

Objective.....	A.1
Defining Award Types.....	A.2
Tracking Award Nominations.....	A.3
Tracking Awards and Incentives.....	A.4

Objective

Users will be able to:

- Nominate Persons for Awards
- Track Awards from inception to conclusion

Overview

Many organizations offer incentives and awards to their employees and members. The Awards application allows organizations to track various awards and incentives programs. The application includes the ability to create many awards programs, to track awards nominees and finally to represent recipients of awards. Common programs include:

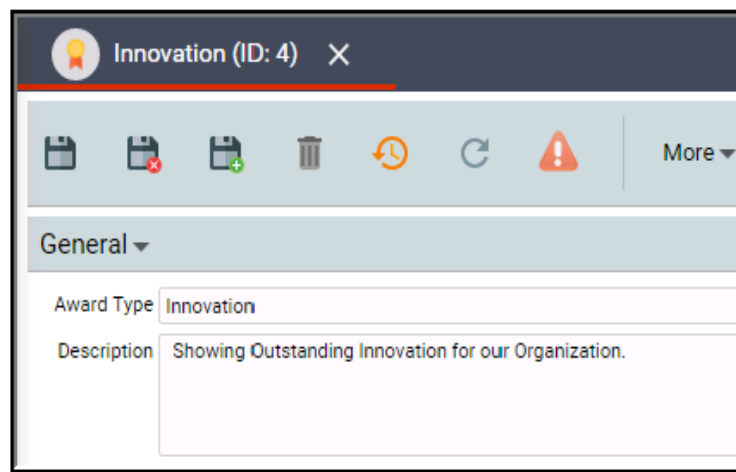
- Committee Years of Service Pins (and similar awards)
- Employee of the Month
- Sales Team Incentive Tracking

Defining Award Types

Before an organization can begin tracking awards in Aptify, the types of awards and incentives that will be offered by the organization must be defined.

The Award Types record tracks the name of the award as well as a description of the award type. Follow these steps to create a new award type:

1. Open a new record from the **Award Types** service.
 - The Award Types service is located in the **Award Management** application.
2. In the **Award Type** field, enter **Innovation** as the name of the award
3. In the **Description** field, enter **Showing Outstanding Innovation for our organization.**



The screenshot shows a web application window titled "Innovation (ID: 4)". Below the title bar is a toolbar with icons for save, delete, refresh, and other actions. The main content area is divided into sections, with the "General" section expanded. It contains two text input fields: "Award Type" with the value "Innovation" and "Description" with the value "Showing Outstanding Innovation for our Organization."

4. Click **Save and Close** the record.

Tracking Award Nominations

Aptify's Award Management application includes the Awards Nomination service that can be used to track the award nomination process. By default, the system does **NOT** automatically convert a nomination to award.

Nominating a Person for an Award

The Awards Nomination record tracks the nomination process. Persons can be nominated for an award by another person or the person can apply for the incentive themselves, depending on the organization's award practices.

1. From the **Awards** dashboard, click on the **New Award Nomination** button.
2. From the **Award Type** drop-down list, select the **Service** award.
3. In the **Person Nominated** field, enter your **Persons** name or ID.
4. In the **Nominated By** field, enter **02 Alexandra Wade**.
5. The **Nomination Date** field defaults to today's date.
6. From the **Status** drop-down list, keep **Pending** as the current status of the nomination, (the default). Once a person has been added as an award nominee, more information can be added or the person's nomination status can be modified at any time as necessary during the nomination process.
7. The available Status types are as follows:
 - **Pending** — Selected by default. The process is pending, no decision made yet.
 - **Approved** — Nominee has been accepted to receive specified award/incentive.
 - **Rejected** — The nominee will not receive the specified award or incentive.
8. In the **Description** field, enter **Test**.
9. **Save** the record.

The screenshot displays a web application interface for an award nomination. At the top, the title bar reads 'Award Nomination ID: 11'. Below the title bar is a toolbar with icons for save, delete, refresh, and other actions. The main content area is titled 'General' and contains the following fields:

Award Type	Member of the Year
Person Nominated	Baldwin, Alesha/Danube Partners
Nominated By	Wade, Alexandra/U. Hardwick Physics AB
Nomination Date	01/14/2016
Status	Pending
Description	Test

Tracking Awards and Incentives

The Awards Granted service can be used to track awards and incentives given out by an organization. A record in this service tracks information such as the types of awards given, the recipient(s), the location of award ceremony, etc.

1. Open a new **Awards Granted** record with one of the following methods:
 - From the **Awards Granted** service, open a new record.
 - From the **Awards** tab on a Persons record, open a new record.
2. From the **Award Type** drop-down list, select the **Service** award.
3. In the **Person Awarded** field, enter **01 - Aiesha Baldwin**
4. In the **Date Achieved** field, enter **[today's date]**.
5. This award is the result of an accepted nomination; link the corresponding nomination to the award by specifying the previously created record in the **Award Nomination** field.
 - If this award was for more than one person, a second winner can be specified in the **Second Person Awarded** field.
6. In the **Award Ceremony Location** field, enter **Hawaii**
7. In the **Other Benefit Provided** field, enter **Trip Awarded**
8. In the **Other Benefit Details** field, enter **All expenses paid trip to annual conference.**
9. In the **Memento Type** field, enter **Certificate**.
10. In the **Memento Type Details** field, enter **\$500.00 Amazon Gift Card**.

The screenshot shows a web form for an 'Award Granted' record. The title bar indicates 'Award Granted ID: 3'. The form is divided into sections: 'General' and 'Memento Type'. The 'General' section includes fields for 'Award Type' (Service Award), 'Person Awarded' (Lambert, Baka/Ottoman), 'Date Achieved' (10/01/2011), and 'Award Nomination' (g). The 'Memento Type' section includes 'Award Ceremony Location' (Hawaii), 'Other Benefit Provided' (None), 'Other Benefit Details' (All expenses paid trip to annual conference.), 'Memento Type' (Certificate), and 'Memento Type Details' (\$500.00 Amazon Gift Card).

11. Click **General** to see the drop-down list of add additional details which can be added about the award being granted or about the recipient(s)--Description, Photo, etc.
12. **Save** the record.

B

Sales Force Automation

Objective.....	B.1
Creating Opportunities Records	B.2

Objective

Users will be able to:

- Create Opportunities Records
- Track Opportunities

Overview

Organizations have a growing need to support contact management and opportunity tracking related to their prospective customers. The Sales Force Automation (SFA) application is designed to bring an integrated approach to tracking the lead generation process to their CMS/AMS system. In addition, many organizations employ inside sales team members. Features like Call Scripting are central to ensuring a common message.

Creating Opportunities Records

1. Click on the **Sales Force Automation** application.
2. Click on the **New Opportunity** button from the dashboard.X
3. In the **Name** field, enter **XYZ Opportunity**.
4. From the **Type** drop-down list, select **General**.
5. In the **Account Manager** field, enter yourself as the primary contact for this opportunity.
6. In the **Person** field, enter a name for the primary contact person for this opportunity.
7. In the **Company** field, enter your **XYZ Company** as the name of the prospect.
8. In the **Requested On** field, enter today's date.
9. In the **Expected Decision Date**, Enter the date three days from today.
10. Look at the options for the **Status**, and **Stage** fields, but keep the defaults.
11. In the **Source** field, enter **Referral** (check the other possibilities).
12. Enter percentages in the Probabilities fields.
13. Click **Save**.

The screenshot shows the Salesforce interface for creating a new Opportunity record. The record is titled "XYZ Opportunity (ID: 2682)". The form contains the following fields and values:

- Name:** XYZ Opportunity
- Type:** General
- Campaign:** (empty)
- Parent:** (empty)
- Account Manager:** John Samuels
- Person:** Baldwin, Aiesha/Danube Partners
- Company:** Danube Partners

Below the main fields is a section titled "Status" with the following fields and values:

- Requested On:** 01/14/2016
- Proposal Sent On:** (empty)
- Expected Decision Date:** 01/17/2016
- Actual Decision Date:** (empty)
- Status:** On Hold
- Stage:** Raw Lead
- Source:** Referral
- Acceptance Probability %:** 0
- Manager Acceptance Probability:** 0

14. Click **Status > Details** tab.
15. Observe the fields, especially the **Commission Percent** and **Confidentiality Level**.
16. Return to the **Status** tab.
17. Change the Status to **On Hold**.

Details ▾

Referred By 🔍 +

Detail Level ▾

Commission Percent Override Commission Percent

Lost To 🔍 +

Prior Opportunity 🔍 +

Next Proposal 🔍 +

Decision By

Confidentiality Level ▾

Confidentiality Comments

18. From Details, open the **History** Tab.
19. Observe: the Status change history is recorded under this tab.

History ▾

NEW EDIT DELETE IN PLACE EDIT 🔼 🔽 🔽 🔽

	APPROVAL STATUS	UPDAT...	DECISI...	EFFECTL...	STAGE	STATUS
<input type="checkbox"/>	Pending	End User		01/14/2... 10:27:22 AM	Raw Lead	On Hold

20. Click the **Line Items** tab

21. Open a new **Line Item**

- The Line Items tab stores information about the product set of goods and/or services being offered to the prospect in the opportunity's proposal and associated amounts.
- This tab stores the items that the organization is actively selling to the prospect as a solution to the requirements specified in the prospect's RFP (Request for Proposal).

Line Items record

General ▾

Product 🔍 +

Product Category 🔍 +

Min. Amount

Est. Amount

Max Amount

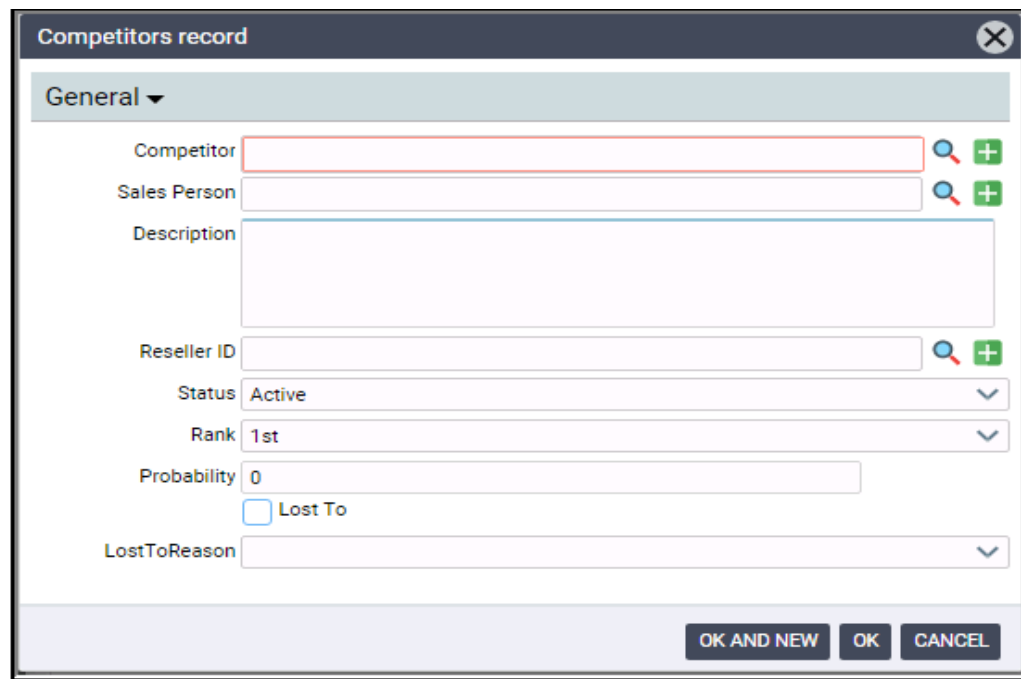
Manager Amount

OK AND NEW OK CANCEL

22. Enter information as desired.

23. **Save** the record.

24. Click the **Competitors** Tab.
25. The Competitors record tracks information about any known companies competing for a particular opportunity.
26. **Add** a New **Competitor's** Record.
27. Observe the fields available to track your competition:



The screenshot shows a 'Competitors record' form with the following fields and controls:

- General** (dropdown menu)
- Competitor**: Text input field with a search icon and a plus sign.
- Sales Person**: Text input field with a search icon and a plus sign.
- Description**: Large text area.
- Reseller ID**: Text input field with a search icon and a plus sign.
- Status**: Dropdown menu with 'Active' selected.
- Rank**: Dropdown menu with '1st' selected.
- Probability**: Text input field with '0' entered.
- Lost To**: Checkbox.
- LostToReason**: Dropdown menu.
- Buttons**: 'OK AND NEW', 'OK', and 'CANCEL' buttons.

28. Enter information as desired.
29. **Save** and **Close** the Record.

C

Reconciliation and Batching

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When to Batch 7.3

How to Reconcile and Batch 7.4

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Cash Control Batches and Lock Boxes 7.17

Exercise 2: Create a Cash Control Batch 7.18

Summary 7.21

Objective

To properly process financial transactions and export them to an FMS, organizations must perform two processes: Reconciliation and Batching.

In this chapter, you will:

- Learn what reconciliation and batching are
- Understand when to reconcile and batch
- Create an Orders batch
- Review Locked Box functionality
- Create a Cash Control batch

Overview

Reconciliation is the process where organizations ensure that two corresponding sets of information, typically numerical, have the same totals. In Aptify, the most common reconciliation is for Payments and Scheduled transactions: Organizations must verify that the money they have received matches the amount of the Payment records. For Scheduled Transactions, organizations must verify that the FMS' Deferred Income GL Account balance matches the unbatched Scheduled Transactions in Aptify.

Aptify uses a “batching” process to aggregate the total value of all GL Entries on orders, payments, or scheduled transactions and export the results to an organization's Financial Management System. The GL batch aggregates, or sums, the individual entries in multiple orders, payments or scheduled transactions by GL account number and currency type. Batches can aggregate any number of records, although each record type, (Orders, Payments, Scheduled Transactions) must be batched separately.

Once records have been batched, Aptify does not allow changes to the records included in the batch. This ensures integrity between the data in the FMS and in Aptify. Each record indicates that it has been batched, and once batched, a user can no longer modify the record. Reconciliation must be done before batching to ensure that any errors are caught and corrected before the records are uneditable.

Types of Batches

There are three types of batches used to aggregate GL Entries and export them to an FMS and Cash Control Batches which are used for reconciliation:

Orders Batches: Can only be run on shipped orders that have not already been batched. Aggregates all the GL Entries found on an Orders record, and updates product inventory counts as necessary.

Payments Batches: Aggregates all GL Entries on Payments records that have not already been batched.

Scheduled Transaction Batches: Aggregates all GL Entries on Scheduled Transaction records. Should only be run on scheduled transactions that occur on the date of the batch or earlier and have not already been batched. Aptify recommends expanding schedule transaction groups regularly, prior to batching, so that scheduled transactions are ready to be batched.

Cash Control Batches: Link payment receipts, such as checks and check numbers to Payment records. Can be generated either manually or via the Lock Box Import wizard. This is covered in greater detail later in the chapter.

When to Batch

Each organization must decide how often to batch based on their business processes and needs. The batching frequency depends on the type of record being batched, and an organization's size:

Orders Batches: Aptify strongly recommends all organizations batch Orders at least weekly for three reasons. First, the batching process can take longer if many orders are included, so batching regularly reduces the number of orders in any given batch. Second, if an organization needs to regenerate GL Entries, a smaller number of orders will again save time. Third, batching regularly keeps Aptify and the FMS more synchronized.

Payment Batches: Aptify strongly recommends that organizations with a large payment volume batch Payments daily. The batches should include only the payments from the previous day, to ensure that all payments, up until 11:59 PM (such as from online orders) are accounted for.

Smaller volume organizations may choose to batch weekly. (A week may begin on Monday morning at 12:00 AM and go through Sunday night at 11:59 PM.)

Organizations should never batch monthly for several reasons:

- Customers expect money to be withdrawn from their bank account in a timely manner, and this should not occur until after the Aptify payments are batched. The payment batch itself should be completed prior to depositing funds because there may be mismatches between Aptify's Payment records and the physical payments; once the funds are deposited, it is extremely difficult to track down the error.
- Because credit card payments are automatically deposited, the more frequently you reconcile and batch, the less difficult it is to find mismatches between Aptify and payment processor.
- Organizations typically prefer to have funds in their bank account sooner rather than later and monthly deposits would delay the process.
- Just as with orders, batching regularly keeps Aptify and an organization's FMS synchronized.

Scheduled Transaction Batches: Organizations should batch all scheduled transactions on the day after the month's end. This is to ensure that any new scheduled transactions are included. For example, membership dues may be a time period starting January 1 through December 31. In this case, the scheduled transactions would be batched on the first of each month, for the previous month. January's revenue, for instance, would be recognized on January 31st, but batched on February 1st.

How to Reconcile and Batch

As described earlier, reconciliation is the process of ensuring the amount of money listed in Aptify matches the actual money received and batching is how the Aptify information is transferred to an FMS. Organizations must reconcile Payments prior to batching and Scheduled Transactions after batching. Aptify includes many sample batching and reconciliation views in version 5.5.5 and greater.

Orders Views

Orders do not need to be reconciled prior to batching. This is because the information for an Order is entirely within Aptify; Orders are created either via an online store, which creates an Orders record in Aptify, or an order is manually created by an employee. Therefore, employees will only need three views to determine which orders should be batched:

Orders Ready for Batching: Based on a shipped date range entered, shows all regular and cancellation orders that have been shipped and have not already been batched.

Order Batch Verification: Shows all unbatched orders with a taken status, that were created on or before the Ship Date entered. This view should be run after the orders in the Orders Ready for Batching view have been batched to determine if any of the orders should be shipped and batched. The primary purpose of this view is to catch unshipped orders.

Order Batch Exceptions: Shows unbatched regular and cancellation orders with shipped status, that were shipped on or before the date entered. Run this view after the orders in the Orders Ready for Batching view have been batched to determine if the orders should be batched or if they failed to batch. This view should always be empty; if it contains orders there may be a problem with your shipping or batching process.

These views should all be run based on the frequency recommended earlier. Note that organizations may choose to batch orders based on the Taken By employee, Product Category, or by Product to create smaller batches that easier to analyze and reconcile. In these cases it is especially important to use Order Batch Verification and Order Batch Exceptions views.

Order Date vs Ship Date

If an organization autoships all orders (the order is shipped as soon as the record is created) then the order date and ship date will always be the same. Therefore, grouping the orders for batching by either date should produce the same results. However, occasionally an order may fail to ship for a variety of reasons. To catch these unshipped orders, use the Order Batch Verification view listed above.

If an organization autoships some orders, but also has products that need to be physically mailed (inventoried products or products that require fulfillment), then some Orders' order dates and ship dates will be different. In these cases, batching using the ship date still applies because the order's revenue should be recognized when the product is mailed. For example, if an order is placed on January 30 but requires fulfillment and is mailed on February 2, the ship date will be February 2 and included in a February batch, along with any orders placed and autoshipped on February 2.

If an organization does not autoship all orders, and instead ships some orders at a later date, the order date and ship date may be different. However, if the products are not physically being mailed on the ship date, their GL entries should be officially recognized on the order date.

In these cases, the organization should modify the Orders Ready for Batching view to use the Order Date because the orders may have been shipped past the end of the accounting period. For example, an order could be taken on January 30 but not shipped in Aptify until February 2. These orders officially occurred during the January accounting period and should be grouped with January accounting period's batches.

Note that for all reconciliation and batching views, it is critical to use date fields with no time index (1/1/2016 vs 1/1/2016 3:45 PM) to avoid incorrectly excluding records from views. These plain date fields are typically indicated with "NoTime" at the end of the field name, such as with OrderDate_NoTime.

Payments Views

Aptify payments must be reconciled prior to batching. This process involves checking the payments totals in Aptify and comparing them with the physical cash and check amounts, and merchant account totals, which include credit card and ACH payments. Organizations will need the following views to properly reconcile and batch:

Cash and Checks Ready for Batching: Shows all unbatched cash and check payments based on the payment date range entered. The view payment total should match the total value of all cash and checks received for these payments. If the totals do not match, compare each check to the payment record in the view.

Credit Card Payments Ready for Batching: Based on the deposit date range entered, shows all credit card payments that have not been batched and have not had any exceptions. The deposit date is used because it is when the payment was captured and appears in the merchant account as received. The view payment total should match the merchant account deposit report, which is commonly known as a **settlement report**. If the totals do not match, compare each item on the settlement report to the payment record in the view.

ACH Payments Ready for Batching: Shows posted ACH (Wire Transfer) payments that have not been batched, based on the date range entered. The view payment total should match the merchant account report. If the totals do not match, compare each item on the merchant account report to the payment record in the view.

Refund Vouchers Ready for Batching: Based on the date range entered, shows Refund Vouchers that have not been batched. When reconciling at month end, ensure the batched refund payments for the month are reflected in the FMS' clearing/refund account.

Credit Memo Payments Ready for Batching: Shows Credit Memo payments that have not been batched based on the date range entered. This view is typically run on the first day of the month to capture the previous month's payments.

Bad Debt Write-Off Payments Ready for Batching: Shows all Bad Debt Write-Off Payments that have not been batched, based on the date range entered. Typically done at year-end. Accountants should set write-off processing guidelines for their organization. Bad debt is discussed in further detail later in this chapter.

Unbatched Posted Payments Verification: Shows all posted payments that have not yet been batched and is used to catch overlooked payments. Ideally, this view should be empty. Run this view after batching all other payment types for the month.

Unbatched Unposted Payments Verification: Shows all unposted payments that have not yet been batched. This view may include credit cards with an exception status, for example, bounced payments. Also included pending payments that cannot be posted. Review payments in this view to confirm that they cannot yet be posted and batched.

These views should all be run based on the frequency recommended earlier. Note that organizations may choose to batch some payment types based on the Taken By employee to make the views easier to analyze and reconcile. In these cases it is especially important to use the Unbatched Posted Payments Verification and Unbatched Unposted Payments Verification views.

Scheduled Transaction Views

With scheduled transactions, organizations must batch for the month before reconciling. To reconcile scheduled transactions, organizations should examine any transactions that were not included in the month's batch to determine if they should have been batched in the current period or a previous period. Organizations should use the following views to batch and reconcile:

Scheduled Transactions Ready for Batching: Shows all scheduled transactions that have not yet been batched, based on the date range entered.

Scheduled Transactions Batch Verification: Shows all unbatched Scheduled Transactions that are less than or equal to the date entered. This view should be empty; if it contains records there is likely an issue with the product's subscription settings, such as with join date or subscription start date.

Future Scheduled Transactions Batch Verification: Shows all unbatched Scheduled Transactions that are greater than or equal to the date entered. Run this view to verify that scheduled transactions are not incorrectly set to a future date.

These views should all be run based on the monthly frequency recommended earlier.

Batching Automation

Organizations can automate the batching process for orders, some payment types, and scheduled transactions. This can save time and effort. However, whether an organization chooses to automate depends on its business practices.

Aptify discourages automating the batching process for payments other than Cash and Checks, which should only be automated if they are reconciled using Cash Control Batches, which are discussed later in this chapter. Organization should never automate credit card or ACH payment batches.

Correcting Common Accounting Errors

Overview

Organizations will occasionally encounter mistakes due to both bad data entry or other oversights. The following lists the most frequently found situations and how to resolve them. Note that the steps taken to correct errors differ greatly based on whether or not the information that needs to be adjusted has already been batched. Organizations should **never manually edit their database through SQL** to correct errors; this severely compromises the integrity of the accounting system and presents a serious audit risk.

Misapplied Payments

Checks are the most frequent source of incorrect data entry. Mistakes can include incorrect amounts, applying a check to the wrong order, or attributing a check to the wrong customer.

Incorrect Amount: If the payment has not yet been batched, users can simply open the record, find the relevant payment line, adjust the amount, and then save the record. The payments GL Entries are then updated.

If the payment has already been batched, users should create a negative payment for the order or orders, using the original payment type. They should then re-create the same payment with the corrected amount. Do not issue an actual refund to the customer via the FMS.

Never modify a credit card payment amount, even if it has only been authorized as the authorization will be for an incorrect value. For overpayments, credit cards can either be fully refunded and then re-charged for the correct amount (after contacting the customer) or the organization can issue a partial refund for the excess amount. For underpayments, contact the customer and obtain approval for the additional amount, then create the payment.

Incorrect Order or Payee: Unlike with payment amounts, both credit card and check payments can have the order ID and payee changed.

If the payment has not been batched, users can again modify the payment record directly. Open the payment and edit each payment line to link to the correct order ID. Users should also update the automatically generated comments field on the payment line to reflect the correct order ID. If the payee information needs to be changed, clear the Person and/or Company fields, and re-enter the correct details. When finished making changes, save the record to update the payment's GL Entries.

If the payment has been batched, and was a check or cash payment, users should create a negative payment using the original payment type, and apply it to the original order or orders. They should then re-create the same payment with the corrected order ID or payee.

If the payment has been batched and was via credit card, issue a full refund using the **Refund This Payment** button on the payment record. Then contact the customer to obtain approval to charge their card again for the appropriate order.

Bounced Checks

If an organization receives notice from their bank that a check has bounced, first find the corresponding Aptify payment. Next, create a new negative payment for the original amount using the same payment type, and apply it to the same order or orders. This credits cash in Aptify so that when the negative payment is batched, the FMS will reflect the correct cash total. Finally, if your organization charges a fee for bounced checks, create a new order for the customer for an NSF (Non-Sufficient Funds) product.

Incorrect GL Accounts on Products

If an order contains a product with incorrect GL account information, and has not been batched, adjust the product's GL accounts. Then, when batching, select Regenerate GL Entries to correct any orders with the old GLs.

If the order has already been batched, users must make adjustment in their FMS only. **Do not bypass Aptify protections by editing Aptify records via SQL.**

Accounting Periods

Overview

Accounting periods are an Aptify record that organize batches from a time frame into one record. For example, for the month of March there may be one orders batch, four payments batches, and one scheduled transaction batch. Batches should be linked to an accounting period when running the batching wizards. By linking all the batch records to a single accounting period, organizations can more easily analyze the transactions and create reports.

Accounting periods are also useful for grouping transactions into periods, by GL Account. For example, an organization may wish to see every debit or credit to a GL account for an order, payment, or scheduled transaction. If using accounting periods this can be done directly in the accounting period's record rather than having to create a separate view.

Figure C.1
Accounting
Period
GL Details



Be aware that when an accounting period is closed, that accounting period can no longer be assigned to new batches. However, this does not prevent transactions (orders, payments, scheduled transactions) from being dated to a time that falls within the period.

Batch Effective Dates and Accounting Periods

When creating batches, users can enter a batch effective date which is the cut-off date for any records that are included in the batch. For example, if batching on December 12 for the last week's orders beginning December 5 and through December 11, the batch effective date is December 11th, since it includes orders on that date. Note that the batch date does not have to be the end of the accounting period or month. Rather, it can be in the middle of the period, as in the last example.

Accounting Period Month Ends

Records in a batch should not cross accounting periods or a month's end, so organizations should adjust their periods accordingly. For instance, if an organization normally batches orders weekly, Monday through Sunday, but the month end falls in the middle of the week, on Wednesday, the organization needs two separate batches. Consider the week of November 28th, 2016 through Sunday, December 4th 2016. The accounting period ends on Wednesday, November 30th, so there will be one batch for November 28-30, with a batch effective date of November 30th and an accounting period of November 2016. The second batch will be for December 1-4, with a batch effective date of December 4 and it will be assigned to the December accounting period.

Figure C.2
Accounting
Period End
Mid-Week



Account Period Details and GL Reports

Users can use the GL Account Period Details service to create views that display the GL Entries for any given account. The views can show the net debit or credit to the account which makes it easy to analyze account balances for any given period.

Figure C.3
GL Account
Period Details
View



In addition to this service, users can also use base views to create views of Order Lines and Payment Lines, with Orders and Payments, to analyze financial data by product or product category. Some of these base views may already be included in your Aptify installation. Both the GL Account Period Details service and Orders and Payment views can be used to find the appropriate data; the method chosen will depend on the organization's business practices and level of detail desired.

Writing Off Bad Debt

At year end, organizations should find any orders with a balance that they do not expect will be paid and record the amount as bad debt to indicate a loss. This is done by applying a Bad Debt Write-Off payment to the order. The Bad Debt Write-Off payment type has its own GL account which records the total amount of bad debt.

Aptify includes a Bulk Write Off wizard which applies bad debt write off payments to individual orders or an entire view of orders. This brings the positive balance on the order to zero. Note that the wizard currently cannot write off credit balances, so organizations will need to manually create payments for these orders using the same payment type.

Figure C.4
Bulk Write-Off
Wizard



Accounts Receivable Report

Overview

Aptify includes an Accounts Receivable report, called the A/R Trial Balance report, which is used as supporting documentation for an organization's financial statements. The report lists all orders that have a positive or negative balance prior to the date entered and is run monthly after completing orders and payments batching. This helps reconcile orders and ensure that the outstanding order balance total on the report matches the accounts receivable GL totals in the FMS. For example, if an order was taken on November 1, but not paid for until December 1, and the report was run on December 3 using November 30 as the period end date, the order would still show a balance on the report. The order would not, however, have a balance in Aptify on December 3.

Figure C.5
A/R Trial
Balance
Report



In Aptify 5.5.5 and later, the A/R Trial Balance report uses the batch effective date to determine which orders and payments are included in the report. This is in contrast to using the order date and payment date to calculate whether a payment applies to an order in an accounting period. For example, if the batch effective date is November 30, and an order was placed on November 1, but not paid until December 3, the report will reflect a balance as long as the payment is properly batched in December with a December effective date. If the payment is incorrectly attributed to November, the report will show no balance.

A/R Trial Balances with Multiple A/R Accounts

Organizations may use multiple A/R Accounts for different products so orders may have GL Entries for more than one A/R account. The A/R Trial Balance report, however, cannot divide order balances into separate reports when it is run; the entire order balance is included in the report. This is because each individual order has its own Order ID, which for financial integrity and audit purposes, cannot be listed in multiple A/R reports. For example, if an order contains two products, the Digital Space Pen, and a Sampeco Baseball Hat, and each product costs \$250 and has its own A/R account, the order total in the A/R Trial Balance report will show \$500 for the order.

This functionality is standard for any FMS' A/R report; Aptify will not split the order balance into separate A/R reports with their respective totals. Organizations that wish to see balance totals for individual A/Rs should examine each A/R's GL account in their FMS, and then sum their totals to reconcile with Aptify's Trial Balance report.

Some organizations may need to create separate reports for business purposes. In these cases, they should never create orders that contain products with different A/R GLs. They can then use views to separate orders with different A/Rs and run the Trial Balance report on each view.

Exercise 1: Create an Orders Batch

In this exercise, use the Order Batch wizard to export the Order information from the orders you have placed.

1. Navigate to the **Home** dashboard and locate the view of **Orders Ready For Batching**.
2. **Right-click** in the view and select **Order Options**, then select **Create Order Batch** from the context menu.
3. The Order Batch wizard appears. Click **Next**.
4. The wizard reports the number of records that qualify for the batch, grouped by currency, and the number of records that have been excluded.
 - Because the view filters unshipped and batched orders, there should not be any excluded orders.
 - Click the box button in the far-right of the Details column to see a list of the included and excluded orders.

Figure C.6
Qualifying
Orders



5. Click **Next**.
6. Leave the regenerate **Regenerate Entries** checkboxes **unselected**, then click **Next**.
 - In general, you should only regenerate entries if you have updated COGS information or have made changes to the system's GL accounts since the orders you are batching were created.
 - Be aware that regenerating entries may take a significant amount of time.
7. The wizard displays the debit and credit totals for the orders in the batch, by currency.
 - If you want to link the batch to an Accounting Period record, you could click the box in the Acct. Period column and browse to the desired record.
 - Users should update the Batch Effective Date to be the end of the accounting period and not the current date.

8. Select the **Approval** checkbox for the US Dollar line, then click **Next**.

Figure C.7
Debit and
Credit Totals



9. Users can change the batch name at this final step before the Batch record is created. Click **Finish**.

- The Batch Results window appears and displays the ID for the batch created.

Figure C.8
Batch
Results



10. Double-click the **entry**, then click **OK** and browse to the Windows **desktop**. By default, Aptify supports exporting the results to a Tab Delimited and Comma Delimited (CSV).

11. Click **Save**.

- A confirmation dialog appears. Click **OK**.

12. Click **OK** to close the Batch Results window and exit the Orders Batch wizard.

13. **Open** the first **orders record** in the view.

- Observe that the Batch ID now appears under the Order Level field.

Figure C.9
Batch ID Listed
on Order



14. **Close** the **record**, then navigate to the **Batches** service and open **Batch ID 42**.

- The Batches record displays a summary of all the Orders included in the batch, their GL Entries, and Inventory Ledger Entries.

Figure C.10
Batches
Record



Cash Control Batches and Lock Boxes

Overview

Cash Control Batches are records that track receipt of a physical payment, such as a cash or check, and connect that information to a Payments record in Aptify. This is done to ensure that the actual money received corresponds to the Payments record that represents the money. On the Cash Control Batch record, users enter the information about the money received, such as the check number, and the amount. The corresponding Payments record is then linked to the Cash Control Batch record.

Note that Payments records can be linked to a Cash Control Batch more easily by entering the Cash Control Batch record's ID when initially entering the payment details at the time of the order. This is particularly useful for organizations that create orders and accept payments at events, such as meetings or conferences.

Approving Cash Control Batches

Once all receipts have been entered, the total money received must match the amount on the Payments records before the Cash Control Batch record can be approved. This ensures that all payments received are applied to customers' orders correctly for A/R reporting purposes and creates a clear audit trail between an order payment and the actual cash receipt.

Lock Boxes

Organizations sometimes have banks process checks and other cash transactions on their behalf. In these cases, the bank may provide a lock box file, which is a summary of all the payments received. This file can then be imported into Aptify using the Lock Box Import wizard which will automatically create a Cash Control Batches record and the receipt information.

In addition to saving significant time entering cash receipts, using the Lock Box Import wizard provides users access to payment matching and posting functionality that is not available when manually creating cash receipts:

Payment Matching: Users can click the Match button to compare the receipts to existing Payments and automatically link the appropriate Payments to the Cash Control Batch. Aptify identifies any exceptions such as missing orders, overpayments, and underpayments.

Payment Posting: If a Payment record has not been created for a cash receipt, users can click the **Post** button to create the Payments record and link it to the Cash Control Batch. Users can also apply overpayments to unshipped orders, or create a refund payment.

Exercise 2: Create a Cash Control Batch

In this exercise, create a new Cash Control Batch record and add an entry to record receipt of the pre-paid check you used to pay for the pre-paid deposit. Then, link the pre-paid deposit Payments record to the Cash Control Batch.

1. Navigate to the **Cash Control Batches** service, located under the **Accounting** application.
2. Create a new **Cash Control Batches** record.
 - Today's date is automatically listed in the Date Entered field.
 - The employee creating the batch is automatically listed in the Entered By field.
3. In the **Deposit Date** field, enter the date the checks will be deposited to the organization's bank account. In this example, use **tomorrow's date**.
4. In the **Customer** field, enter **Aiesha Baldwin**.
5. In the **Amount** field, enter **500**.
6. In the **Type** field, enter **Pre-Paid Check**, then click **Add**.
7. A cash receipt appears in the view.

Figure C.11
Cash Control
Batch Entry



8. Double-click the **entry** to open it. A Cash Detail record, appears.
 - Observe that the Lock Box information area is grayed out, and inactive. Had this receipt been created using the Lock Box Import wizard, these fields and options would be available.
9. In the **Check Number** field, enter **12345**.
 - This corresponds to the check number used for purchasing the pre-paid deposit.

Figure C.12
Cash Detail
Record



10. Click **OK**, then **save**, but do not close, the Cash Control Batch record.
11. Navigate to the **Order Entry** dashboard, and open the **Payments** record for the **Pre-Paid Deposit** product.
12. Click the **Details** tab.

13. In the **Cash Control Batch** field, enter **1**, then press **enter**.

Figure C.13
Payment Cash
Control Batch
Link



14. **Save and Close** the Payments record, and return to the **Cash Control Batch** record.

15. Click the **Payments Posted** tab.

- The Payment has now been linked to the Cash Control Batch.

16. Click **Approve**.

- A confirmation dialog, appears. Click **Yes**.

Figure C.14
Linked
Payments



17. The **Date Approved** and **Approved By** fields are completed.

- Users must first click **De-Approve** before they can make changes to the Cash Control Batch.

18. **Save and Close** the record.

Summary

- Use Orders, Payments, and Scheduled Transaction Batches to export accounting information to an FMS.
- Aptify recommends that organizations batch information regularly
- Use Cash Control Batches to ensure cash received matches Payments records.
- Using Lock Box functionality can save time creating Cash Control Batches.

Objective.....	D.1
Creating an Expos Record	D.3
Adding Expo Prices	D.4
Creating Floorplans	D.5
Creating Booths Using the Booth Generator	D.7
Using the Booth Combination Wizard	D.11
Linking Meetings to Expos.....	D.15
Taking an Order for a Booth.....	D.17
Canceling an Expo Order	D.20
Using the Floorplan Copy Wizard.....	D.22

Objective

Within Aptify, you can create and track Expos and design the layout of booths in the Expo's venue. After completing this chapter, you will be able to:

- Create a new Expo
- Create a Floorplan
- Link a Meeting to an Expo
- Work with Booths
- Order a Booth

Overview

The Expos service provides an easy-to-use interface where an organization can create and manage all aspects of an exposition, including floorplans, booths, dates of the exposition, and contact information for the company and persons sponsoring the exposition. The Expo Management functionality is used to plan and manage a single expo, multiple expos, or for an exposition that is part of a larger event. Each Expos record tracks the total units of booth inventory, as well as any meetings that may be linked to the exposition.

Expos are created as products with extended characteristics. Creation of an expos product requires the following items to be set up beforehand:

- All GL accounts required by the organization to track expo finances.
- One or more Product Categories records for Expo products that are associated with the GL accounts created to track expo finances.
- A Product Types record named Expo that enables the Expo tab to display on the Products record. (This is included with the standard Aptify installation.)
- A Products record for the expo, associated with the expo product category and product type.

Creating an Expos Record

1. Click the **Expo Management** dashboard.
2. Click **Expos** service; click the **New Expos** button.
 - An Expo record is a Products record with **Type** set to **Expo**. There is also an Expo tab added to the Products form.
3. In the **Name** field, enter **XYZ Expo** (where *XYZ* are your initials).
4. In the **Category** field, enter **Exhibits**. Note that the **Type** field defaults to Expo.
5. Click the **Expo** tab.

Expos > General Tab

6. The General tab appears.
7. In the **Expo Name** field, enter **XYZ Expo** (where *XYZ* are your initials).
8. In the **Vendor** field, enter your **Company**.
9. In the **Vendor Contact** field, enter your **Persons** record.
10. In the **Start Date** field, enter next **Monday's** date.
11. In the **End Date** field, enter next **Friday's** date.
12. In the **Setup Date** field, enter this **Saturday's** date.
13. In the **Setup Req. Date** field, enter this **Sunday's** date.
14. Click **Save**.

XYZ Expo (ID: 9924) X

Name: XYZ Expo

Category: Exhibits

Type: Expo

Parent Product:

Expo

General

Expo Name: XYZ Expo

Vendor: Danube Partners

Vendor Contact: Baldwin, Aiesha/Danube Partners

Prior Expo:

Start Date: 12/26/2016

End Date: 12/30/2016

Setup Date: 12/24/2016

Setup Req. Date: 12/25/2016

Adding Expo Prices

Establishing prices for booth space at an Expo is different than setting prices for other products. An exhibitor pays for booth space at an Expo. If these booths are all the same size, then you can charge a uniform amount per booth to each exhibitor. However, if you offer booths of varying sizes you can define a base unit (such as a base booth size) and then configure expo pricing based on the number of units that the booth occupies.

Example 1: An exhibitor rents floor space to accommodate a 10x10 booth (100 sq feet). If all of the booths at the Expo are the same size, 1 unit can equal 1 booth. In this case, you would use the following pricing rule if one booth costs \$1000.00:

Dimensions	Number of Units	Total Cost for Booth
10x10 Booth (100 sq ft)	1 unit	\$1000.00

Example 2: Your venue supports two booth sizes: an 8x10 booth (80 sq ft) and a 10x10 (100 sq ft). In this case, you define a unit based on a common denominator between the two booth sizes. Therefore, 1 unit equals 20 sq ft, and the 8x10 booth is 4 units ($4 \times 20 = 80$), and the 10x10 booth is 5 units ($5 \times 20 = 100$). If you establish a price of \$200 per unit, then these booths would have the following prices:

Dimensions	Number of Units	Total Cost for Booth
8x10 Booth (80 sq ft)	4 units 1 unit = \$200	\$800.00
10x10 Booth (100 sq ft)	5 units 1 unit = \$200	\$1000.00

Adding Member and Non-Member Prices

1. On the Expo record, click the **Expo > Pricing Table** tab.
2. Click **New** to open a new **Prices** record.
3. In the **Name** field, enter **Member Price**.
4. In the **Price** field, enter **\$100**. From **Member Type** drop-down menu, select **Member**.
5. Click **OK**.
6. Click **New**. In the **Name** field, enter **Non-Member Price**.
7. In the **Price** field, enter **\$200**.
8. Click to select the **Default** box to indicate this is the default price for the product.
9. From the **Member Type** drop-down menu, select **Non-Member**.
10. Click **OK**.
11. **Save** and **Close** the Expos record.

Creating Floorplans

A Venue can have one or more Floorplans that define the possible layouts of the venue space. Floorplans are tied to Expos.

In this exercise, you will create a new floorplan.

1. From the **Floorplans service**, open the **Floorplans** record (or use the New Floorplan Wizard)
2. Open a **New Floorplans Record** link.
3. Click the red **Floorplans** link to the left of the **Floorplans** field.
 - The New Floorplan Wizard launches automatically.



4. Click **Next** to continue.
5. Select **Create Blank Floorplan**.
6. Click **Next**.
7. Click **Finish** to create the blank floorplan.

8. In the **Name** field, enter **XYZ Expo Floorplan**.
9. In the **Venue** field, enter **Conf Hall**.
 - Open the **Venue** record by clicking the red field link to the left of Venue field.
 - Observe the information that can be stored for a **Venue** and **Room** - these records are created and controlled by **Administrators** of Aptify.
10. From the **Unit of Measure** drop-down list (if not already selected), select **Feet**.
11. In the **Width** field, enter **200**, and in the **Length** field, enter **100**.
12. In the **Drawing Scale** field, enter **100**, and in the **Page Scale** field, enter **1**.
 - These two parameters form a ratio that defines the scale of the floorplan map. In this exercise, the scale is 1:100.
13. In the **Default Width** field, enter **10**.
14. In the **Default Length** field, enter **10**.
15. In the **Default Units** field, enter **1**.
 - In this exercise, the default unit size is a booth that is 10x10 (100 square feet).
16. From the **Status** drop-down list, select **Arrange & Assign**.
17. In the **Next Booth Name** field, enter **XYZ Booth**.
18. In the **Booth Increment** field, enter **1**.
19. Click **Save**.

XYZ Floorplan (ID: 1)

General

Name: XYZ Floorplan

Description:

Venue: [XYZ Convention Center](#)

Unit Of Measure: Feet

Width: 200

Length: 100

Drawing Scale: 100

Page Scale: 1

Default Width: 10

Default Length: 10

Default Units: 1

Status: [Arrange & Assign](#)

Drawing File:

Allow Copies

Date Opened:

Opened By:

Next Booth Name: XYZ Booth

Booth Increment: 1

Floorplan System: [ExpoCAD](#)

External Floorplan ID:

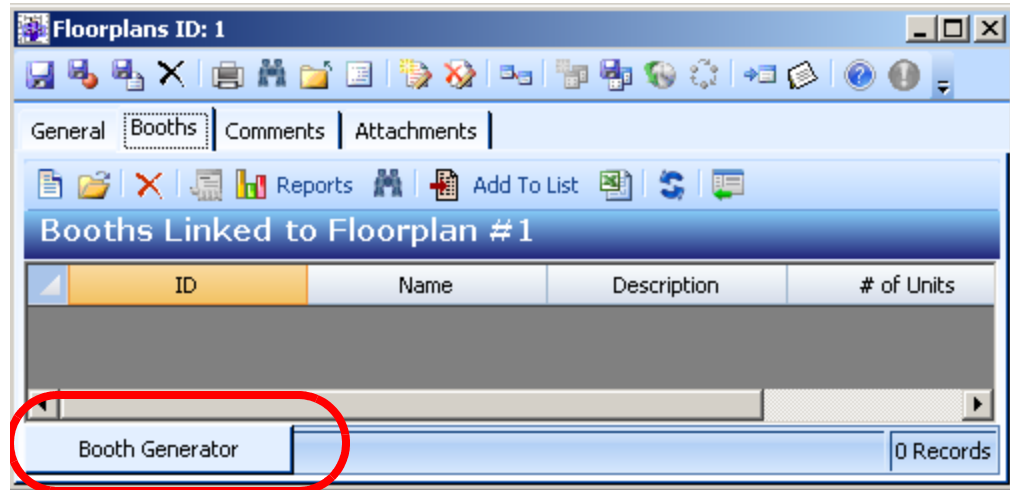
Last Synchronization Date:

Comments:

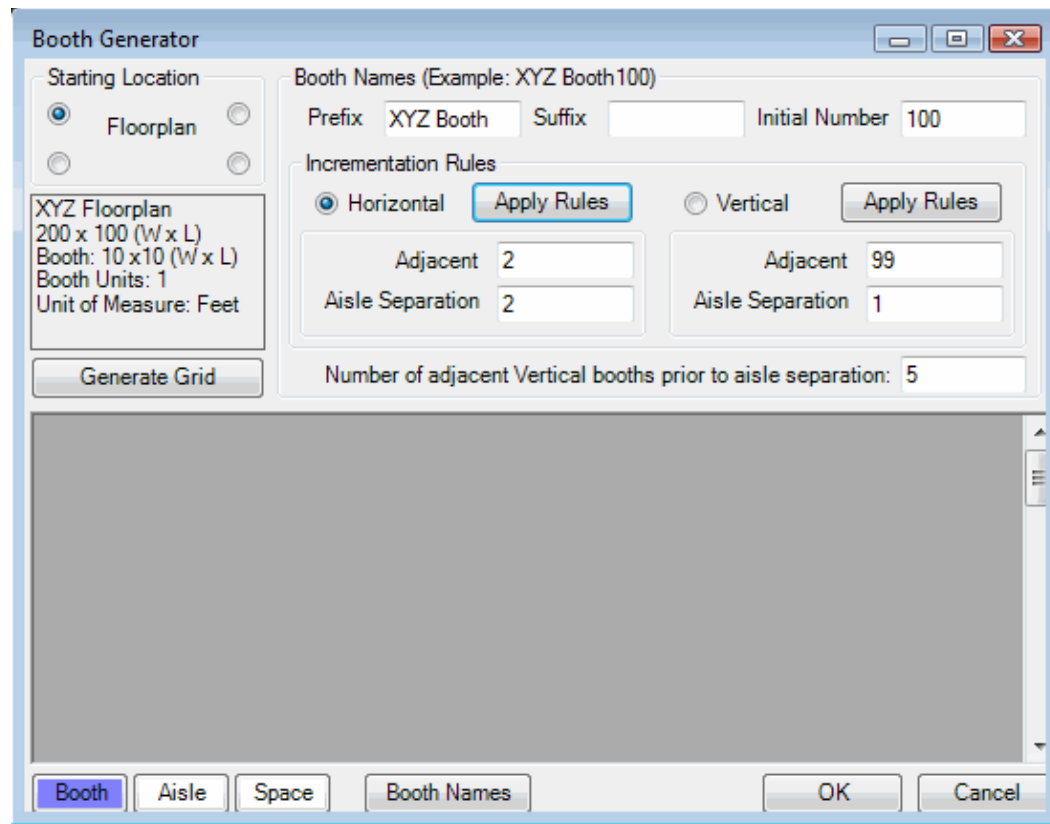
External Rate Plan:

Creating Booths Using the Booth Generator

1. Click the **Booths** tab on the XYZ Expo Floorplan record.
2. Click the **Booth Generator** button.



3. In the **Starting Location** section, select the option in the upper left-hand corner.
 - With this option selected, the Booth Generator will begin labeling booths from the upper left-hand corner.
4. Change the **Initial Number** to 1.
5. Select the **Horizontal** option in the Incrementation Rules section.
6. Click the **Apply Rules** button in the Horizontal section.
 - The Adjacent and Aisle Separation fields update automatically.
 - Leave the Number of adjacent Vertical booths prior to aisle separation set to 5.
 - These settings determine booth layout and numbering.



7. Click **Generate Grid**.
 - The Booth Generator adds booths and aisles to the floorplan.
8. Select Booth **101** and click the **Space** button.
 - You can use this option to add spaces within the floorplan.
9. Select the Space cell and click the **Booth** button.
 - The Space is changed back to a Booth.
10. Select the blank Booth and click the **Booth Names** button.
 - The Booth is renumbered back to 101.

Booth Generator

Starting Location

Floorplan

XYZ Floorplan
200 x 100 (W x L)
Booth: 10 x 10 (W x L)
Booth Units: 1
Unit of Measure: Feet

Generate Grid

Booth Names (Example: XYZ Booth100)

Prefix: XYZ Booth Suffix: Initial Number: 100

Incrementation Rules

Horizontal Apply Rules Vertical Apply Rules

Adjacent: 2 Aisle Separation: 2 Adjacent: 99 Aisle Separation: 1

Number of adjacent Vertical booths prior to aisle separation: 5

	0	10	20	30	40	50	60	70	80
0	100	102	104	106	108		110	112	114
10									
20	101	103	105	107	109		111	113	115
30	200	202	204	206	208		210	212	214
40									
50	201	203	205	207	209		211	213	215
60	300	302	304	306	308		310	312	314
70									
80	301	303	305	307	309		311	313	315

Booth Aisle Space Booth Names OK Cancel

11. Click **OK**.
 - Be patient while the system creates the necessary Booths records.
 - If only one booth shows up in the Booths view, refresh the view to show all of the booths.
12. Double-click the first **Booths** entry in the Floorplan's Booth tab to open the corresponding Booths record.
13. Add **3** to the **Maximum# field** (in the Booth Registrant Information section).
14. Review the format of the Booths record.

XYZ Booth100 (ID: 1) ×

Save Save with icon Delete Refresh Refresh Warning More ▾

General ▾

Name

Description

Floorplan 🔍 🗑️

XCoord YCoord

Width Length

of Units Area

Booth Registrant Information

Maximum # Complimentary

Surcharge Surcharge Amount Merged

Merged Into Booth

Order Information

Occupied

Linked Order

Linked Person

Linked Company

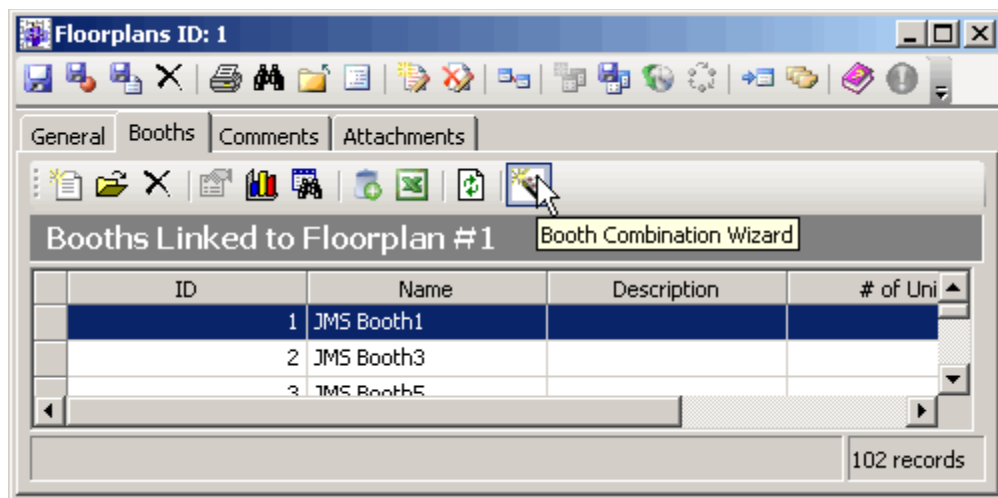
15. **Save** and **Close** the Booths record.

Using the Booth Combination Wizard

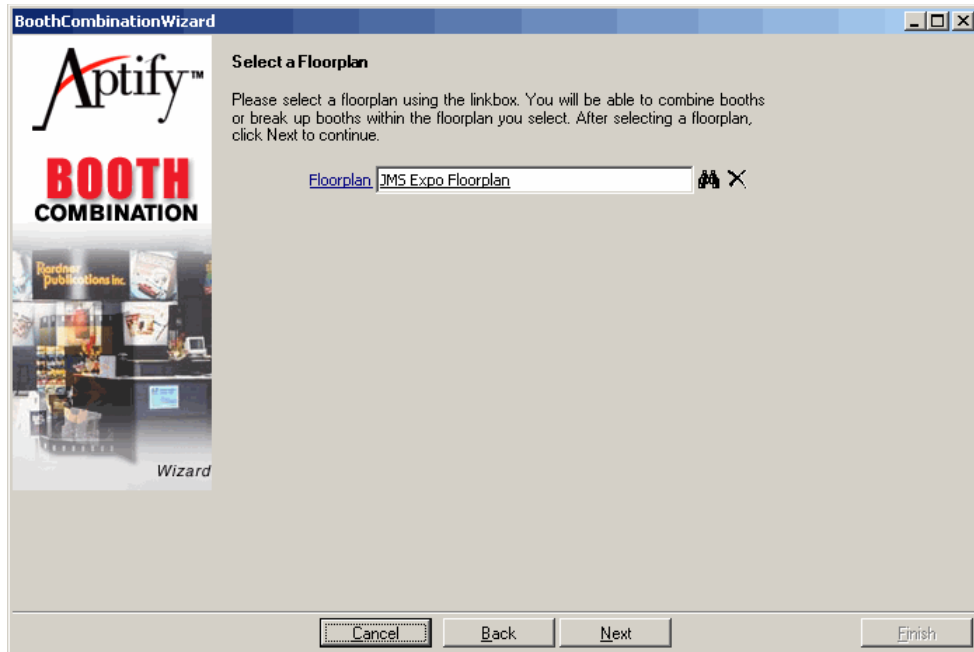
You use the Booth Combination Wizard to combine one or more booths into a larger booth or to break up a combined booth to two or more smaller booths.

Combining Booths

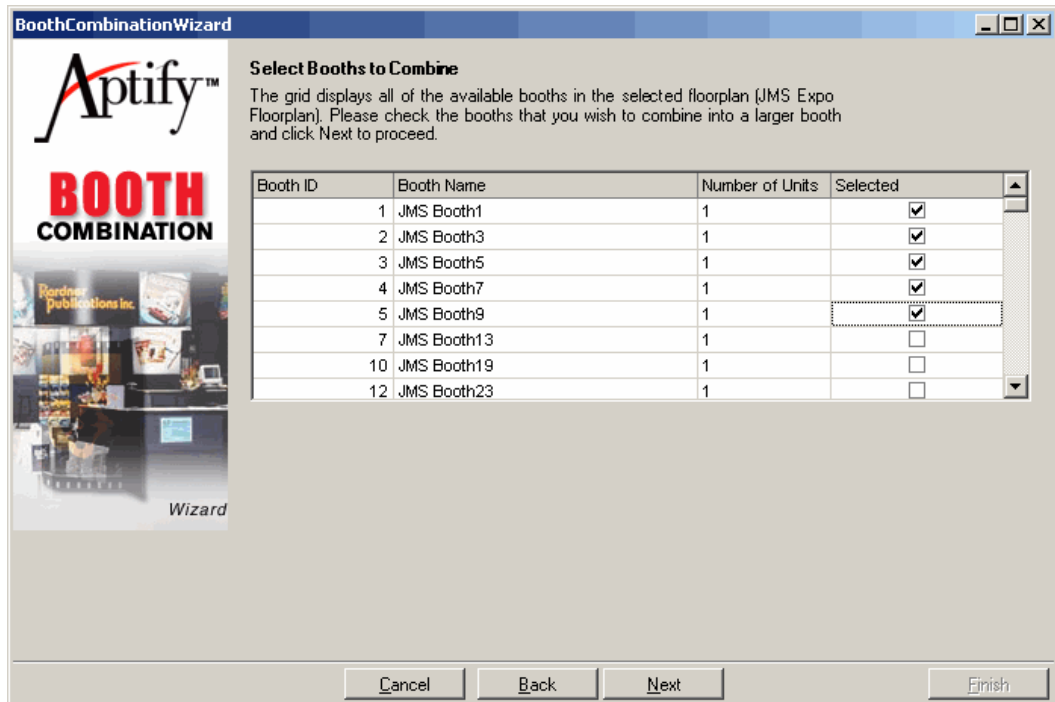
1. Open the *XYZ Expo Floorplan* record's Booths tab (if not already open).
2. Click the **Booth Combination Wizard** icon to launch the Booth Combination Wizard.



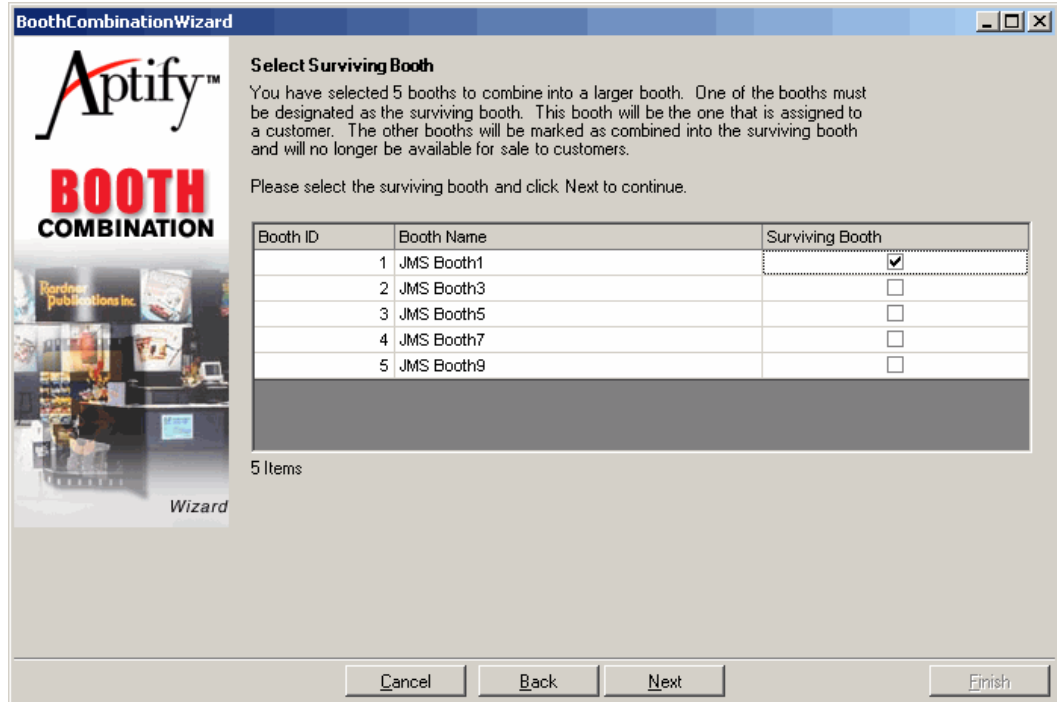
3. Click **Next** to continue.
4. Enter *XYZ Expo Floorplan* in the **Floorplan** field and click **Next**.



5. Select **Combine booth records to create a larger booth** and click **Next**.
6. Place a check mark in the **Selected** box for the following booths: Booth1, Booth3, Booth5, Booth7, and Booth9. Note: You may need to scroll through the list of booths to find the needed booths.



7. Click **Next**.
8. Place a check mark in the **Surviving Booth** box for Booth1 and click **Next**.



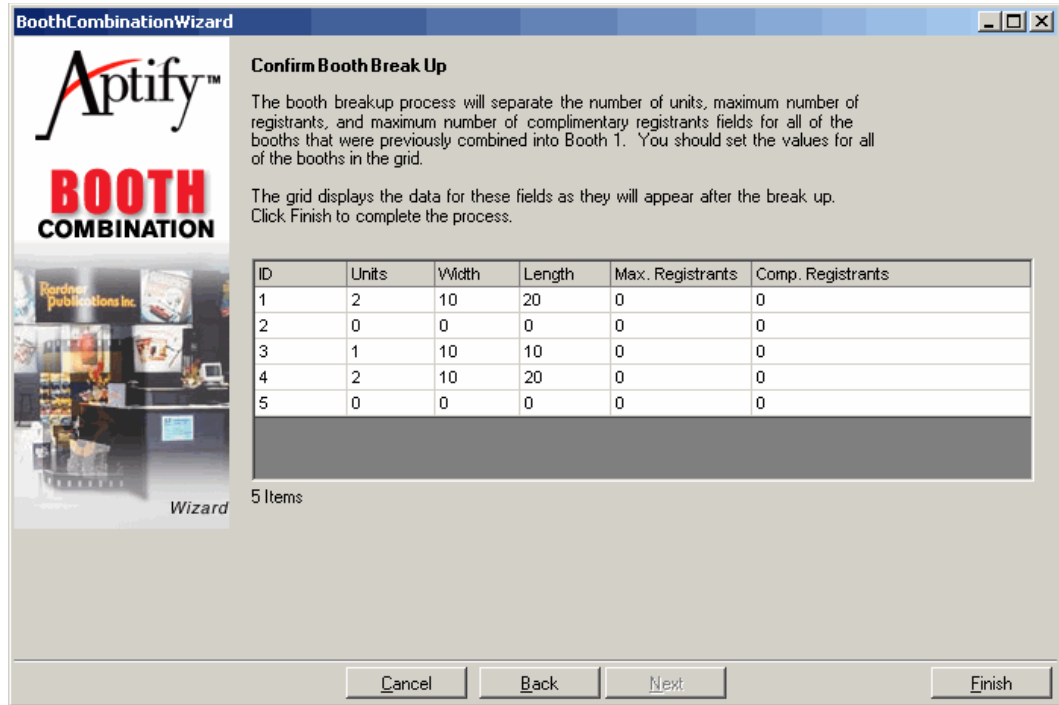
9. Review the settings for the new combined booth and click **Finish**.
10. Click **No** to combine another set of booths.

Separating Booths

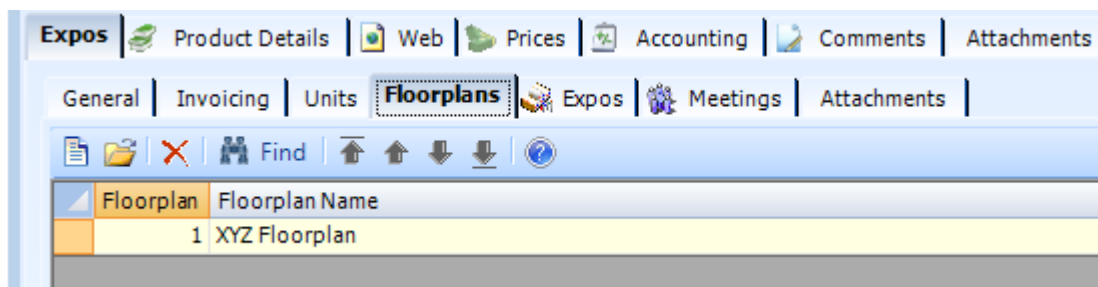
At times it may be necessary to separate booths after they have been combined. The Booth Combination Wizard offers the flexibility to separate booths.

1. Open the *XYZ Expo Floorplan* record's Booths tab (if not already open).
2. Click the **Booth Combination Wizard** icon to launch the Booth Combination Wizard.
3. Click **Next** to continue.
4. Enter *XYZ Expo Floorplan* in the **Floorplan** field and click **Next**.
5. Select **Break apart a booth record to create smaller booths** and click **Next**.
6. Place a check mark in the **Selected** box for the Booth1 booth and click **Next**.

7. Allocate the available Units and Length among the five records.
 - Create two 2-unit booths with one 1-unit booth in the middle. (as shown in Figure 21.13).



8. Click **Finish**.
9. Select **No** when asked if you want to break up additional booths.
10. **Save** and **Close** the **Floorplans** record
11. The **Floorplans** record should now display beneath the **Floorplans** tab of the **Expos** record.



Linking Meetings to Expos

An Expo product may be linked to one or more meetings. An organization that sells booth space to an event frequently sells attendance for the same event.

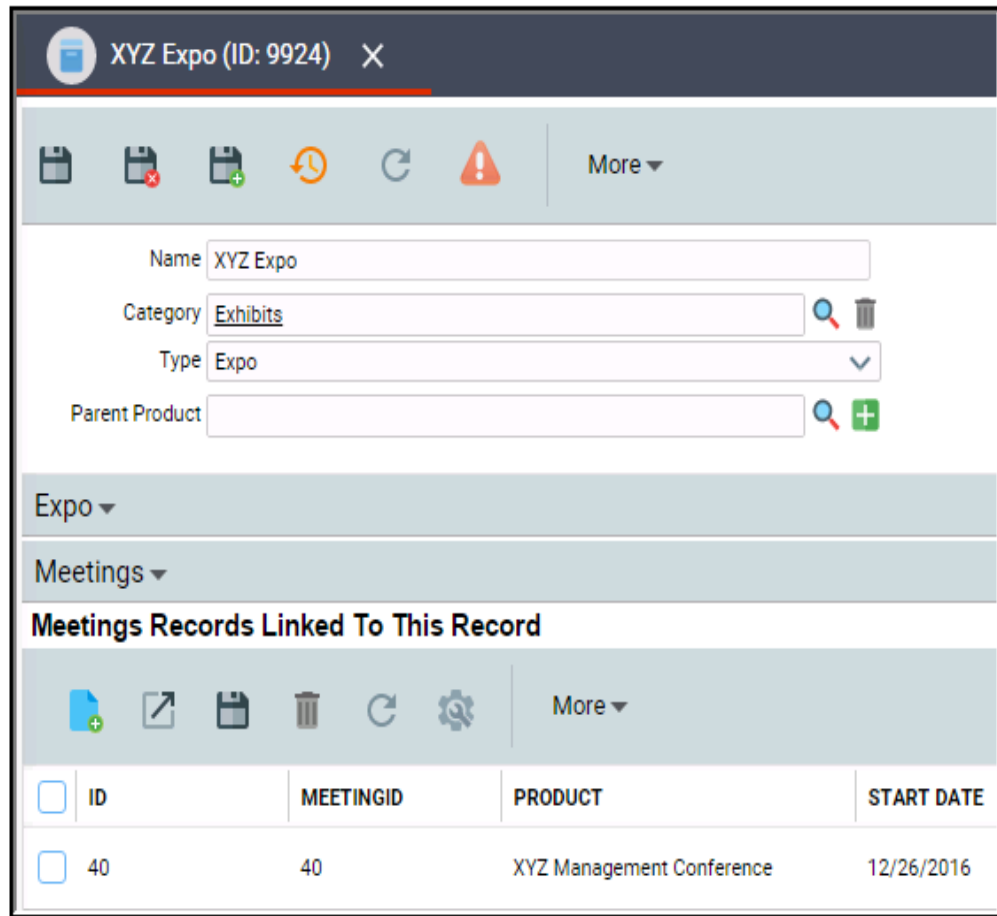
In addition to defining the link between the Expo and Meeting products, you can also track Expo Registrants who are staffing a particular booth. Aptify allows the user to specify if a meeting registrant is an exhibitor, and if so, which booth he/she will be staffing.

1. Open the **Meetings** tab of the Expos record.
2. Open a **New Meetings Record**.
3. Enter **XYZ Management Conference** in the **Name** field (where *XYZ* are your initials).
4. Enter **Meetings** in the **Category** field.
5. Click the **Prices** tab.
6. Add a **Member** Price of **\$1000**.
7. Add a default **Non-Member** Price of **\$2000**.
8. Click the **Meetings** tab.
9. Enter **XYZ Management Conference** in the **Meeting Title** field.
10. Enter the **Dates** for the meeting that match the original **Expo** record.
11. Leave the **Status** set to **Planned** (the default setting).
12. Enter your **Employee** in the **Coordinator** field.
13. Enter **XYZ Expo** in the **Linked Expo** field.

The screenshot displays the 'XYZ Management Conference (ID: 9925)' record in the Aptify system. The interface is organized into several sections:

- Meeting Section:**
 - Name:** XYZ Management Conference
 - Category:** Meetings
 - Type:** Meeting
 - Parent Product:** (Empty field with a search icon and a plus sign)
- General Section:**
 - Meeting Title:** XYZ Management Conference
 - Start Date:** 12/26/2016
 - End Date:** 12/30/2016
 - Status:** Planned
 - Meeting Type:** (Empty field with a search icon and a plus sign)
 - Coordinator:** Adam Smith
 - Linked Expo:** XYZ Expo
 - Meeting Conflict:** No Conflict Validation
 - Max Reg.:** 0
 - Avail. Space:** 0
 - Description:** (Empty text area)

14. Click **Save and Close**.
15. The **XYZ Management Conference** displays under the **Expos Meeting Tab**.
 - Users may have to click the **refresh** button to display.



Taking an Order for a Booth

A user reserves a specific Expo booth by placing an order for that booth. Aptify limits the selection of the booth to those that are available within one of the floorplans linked to the Expo product. The system will not allow the user to assign a booth that has already been assigned to another customer or one that has been merged into another booth. In addition, the system will validate that the user has purchased enough units.

1. Open a new order.
2. Enter your **Persons** record in the **Ship To** field.
3. Create an order line for 1 unit of **XYZ Expo 20XX**.
4. Click the **Add** button.
5. The **Order Line, Expos** tab should automatically display.
 - This occurs IF the Expo Product's Order Line Details are set up to automatically display under the Products, Details tab
6. Click the **Booths** tab.
7. Select **XYZ Floorplan** from the **Floorplan** drop-down menu - if not the default floorplan.
8. Enter **XYZ Booth1** in the **Booth** fields.

The screenshot shows a window titled "Order Lines record" with a close button (X) in the top right corner. The window is divided into several sections:

- Expo**: A dropdown menu.
- Booths**: A dropdown menu.
- Floorplan**: A dropdown menu showing "XYZ Floorplan".
- Booth**: A text input field containing "XYZ Booth101". To its right are a magnifying glass icon, a trash can icon, and a "Configure..." button.
- Booth Name**: A text input field containing "XYZ Booth101".
- Weight Required**: A text input field containing "0".
- Configuration Type**: A dropdown menu.
- Booth Options**: A section containing six checkboxes:
 - Needs Electric
 - Needs Water
 - Needs Compressed Air
 - Is Decorated
 - Needs Gas
 - Needs Drain
- Units**: A text input field containing "1".
- Surcharge**: A text input field containing "\$0.00".

At the bottom right of the window are two buttons: "OK" and "CANCEL".

9. Click **OK** to return to the **Order** form.
10. Enter your saved **Credit Card** payment information.
11. Click **Save** and click **No** when asked if you want to ship the order.
12. **Add** an order line for 1 unit of **XYZ Management Conference**.
13. The **Order Line, Meetings, General** tab should automatically display.
14. Place a check mark in the **Is Exhibitor** box.
15. Select **XYZ Booth1** in the **Exhibitor Booth** field.

The screenshot shows a software window titled "Order Lines record" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Meeting" and "General", with "General" selected. The form contains several fields: "Meeting Name" (XYZ Management Conference), "Attendee" (Baldwin, Aiesha/Danube Partners), "Badge Name" (Aiesha Baldwin), "Badge Company Name" (Danube Partners), "Badge Title" (Marketing Senior Director), "Registration Type" (Pre-Registration), "Status" (Registered), and "Exhibitor Booth" (XYZ Booth101). A checkbox labeled "Is Exhibitor" is checked and highlighted with a red circle. A "Show Name On List" checkbox is also checked. A "Cancellation Date" field is present but empty. At the bottom right, there are "OK" and "CANCEL" buttons.

16. Click **OK** to close the Order Lines record and return to the order.
17. Save the order, and click **Yes** when prompted to pay the order in full using the specified credit card information.
18. Say **Yes** when asked if you want to ship the order.
 - The system ships the order and locks down parts of the order to maintain an accurate audit trail.
19. **Close** the order.

20. In **Quick Search**, enter and click on **Find Booths** view.
21. Enter **XYZ Booth101** in the **Name** prompt.
22. Double-click the **XYZ Booth101** entry to open the corresponding Booths record.
 - Notice that the order information now appears on the Booths record.

The screenshot shows a web-based interface for managing booth records. At the top, there is a toolbar with icons for save, delete, refresh, and a warning sign, along with a 'More' dropdown menu. Below the toolbar is a 'General' section with the following fields:

- Name: XYZ Booth101
- Description: (empty)
- Floorplan: XYZ Floorplan
- XCoord: 5, YCoord: 75
- Width: 10, Length: 10
- # of Units: 1, Area: 100

Below the 'General' section is the 'Booth Registrant Information' section with the following fields:

- Maximum #: 3, Complimentary: 3
- Surcharge: Flat Amount (dropdown), Surcharge Amount: \$0.00, Merged: (checkbox)
- Merged Into Booth: (empty)

Below the 'Booth Registrant Information' section is the 'Order Information' section with the following fields:

- Occupied: (checked checkbox)
- Linked Order: 10163
- Linked Person: Baldwin, Aiesha/Danube Partners
- Linked Company: Danube Partners

23. **Close** all open records.

Canceling an Expo Order

In this exercise, you will run the Order Cancellation wizard from an Orders view to cancel the Meeting and Expo you ordered in Exercise 10.

1. Open an **Orders** view.
2. Click the **Order Cancellation Wizard** icon to launch the wizard.
3. Click **Next** to continue.
4. Enter the ID of the Order you created in Exercise 10 in the **Order** field and click **Next**.
5. Place a check mark in the box for both the Expo and the Meeting and click **Next**.

Aptify Order Cancellation Wizard

Step 2: Specify Order Lines
Please specify one or more lines to cancel. Also, indicate the quantity which should be cancelled. To see order line details, click in the Product column.

Check All Check None

	Line	Product	Quantity	Cancel Quantity
<input checked="" type="checkbox"/>	1	JMS Expo 2007	2.0000	2.0000
<input checked="" type="checkbox"/>	2	JMS Management Conference	1.0000	1.0000

Include Cancellation Fee Product

Product:

Fee:



Cancel Back Next Finish

6. Select the **Keep On Account** option and click **Next** to continue.
7. Click **Finish** to create the cancellation order.
8. Click **Yes** to open the order after the cancellation order has been created.
9. Change the **Order Status** to **Shipped** and click **Yes** when asked if all items have shipped.
10. Close the order.
11. Click **No** when asked if you want to process another cancellation (this closes the wizard).
12. Open the *XYZ Expo Floorplan* from the Floorplans service.
13. Click the **Booths** tab.
 - Notice that the **IsOccupied** field is now set to **False** for *XYZ Booth1*.
14. Double-click the *XYZ Booth1* entry to open the corresponding Booths record.
 - Notice that the order information has been removed from the Booths record.

General ▾

Name

Description

Floorplan  

XCoord YCoord

Width Length

of Units Area

Booth Registrant Information

Maximum # Complimentary

Surcharge Surcharge Amount Merged

Merged Into Booth

Order Information

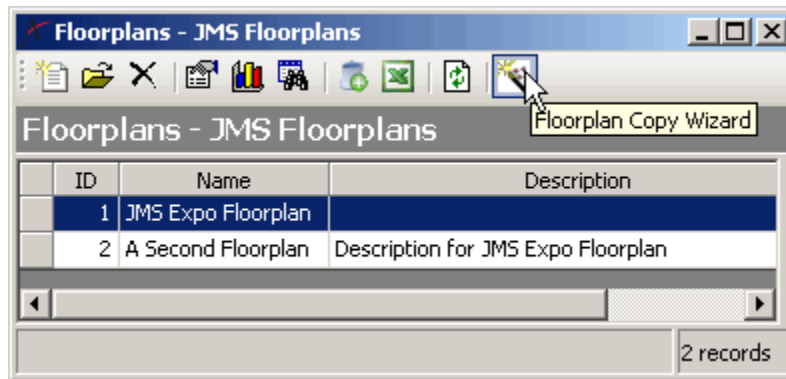
Occupied

15. **Close** all open records.

Using the Floorplan Copy Wizard

You can use the Floorplan Copy wizard to create a copy of an existing floorplan (for example, if you have previously held an expo in this venue, you can save time by copying an existing floorplan and its booths and then make modifications as necessary).

1. Create a view of the Floorplans service using **XYZ Floorplans** as the **Name** and add the following filter:
 - **Service:** Floorplans
 - **Field:** Name
 - **Operator:** Contains
 - **Value:** *XYZ* (your initials)
2. Click the **Floorplan Copy Wizard** icon in the View toolbar to launch the wizard.



3. Click **Next**.
4. Enter **XYZ Expo Floorplan** in the **Floorplan** field and click **Next**.
5. Select all booths to copy and click **Next**.
6. Enter **XYZ Expo 20XX Production Floorplan** in the **Name** field.

Floorplan Copy Wizard

Create New Floorplan

Please enter a name, description and status for the new floorplan. Click Next to complete the process.

Name: JMS Expo 2007 Production Floorplan

Description: Description for JMS Expo Floorplan

Floorplan Status: Arrange & Assign

Buttons: Cancel, Back, Next, Finish

7. Click **Next** and allow the system to generate the booth records.
8. Click the **Display** option to view the new Floorplans record.
9. Click the **Booths** tab and confirm that the wizard copied the booth configurations from the XYZ Expo Floorplan.
10. Close all open records and wizards.

Objective

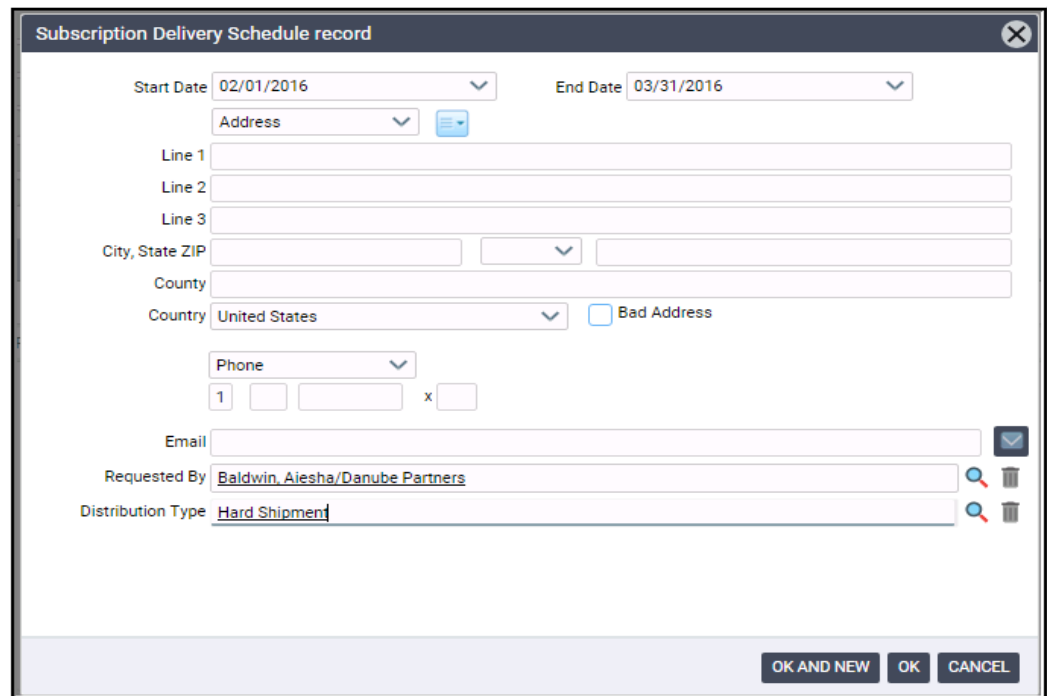
Users will be able to:

- Alter the Delivery schedule of a subscription publication.
- Understand the Fulfillments function.
- Add Publication contributors to a product record.

Altering the Delivery Schedule

You can change the delivery schedule for a subscription so that a recipient can receive their subscription while on vacation or at another office location.

1. From a Subscriptions record, select the **Delivery Schedule** tab.
2. Click the **New** button to open a new **Subscription Delivery Schedule** record.
3. Enter a date one month from today in the **Start Date** field.
4. Enter a date two months from today in the **End Date** field.
5. Enter an alternate address and contact information in the fields provided.
6. Enter your **Persons ID** in the **Requested By** field.
7. Enter **Hard Shipment** in the **Distribution Type** field.



The screenshot shows a web form titled "Subscription Delivery Schedule record". The form contains the following fields and controls:

- Start Date:** A date picker set to 02/01/2016.
- End Date:** A date picker set to 03/31/2016.
- Address:** A dropdown menu with a blue plus icon.
- Line 1, Line 2, Line 3:** Three text input fields for the address.
- City, State ZIP:** A text input field, a dropdown menu, and another text input field.
- County:** A text input field.
- Country:** A dropdown menu set to "United States" and a checkbox labeled "Bad Address".
- Phone:** A dropdown menu, a text input field with "1" in a small box, another text input field, and a small "x" icon.
- Email:** A text input field with a blue envelope icon.
- Requested By:** A text input field containing "Baldwin, Alesha/Danube Partners" with a magnifying glass and trash icon.
- Distribution Type:** A text input field containing "Hard Shipment" with a magnifying glass and trash icon.

At the bottom right of the form, there are three buttons: "OK AND NEW", "OK", and "CANCEL".

8. Click **OK**.
9. Click **Save**.
 - At the time of fulfillment, Aptify will look at the date and create the mailing label with the alternate address.

Viewing Subscription Fulfillments

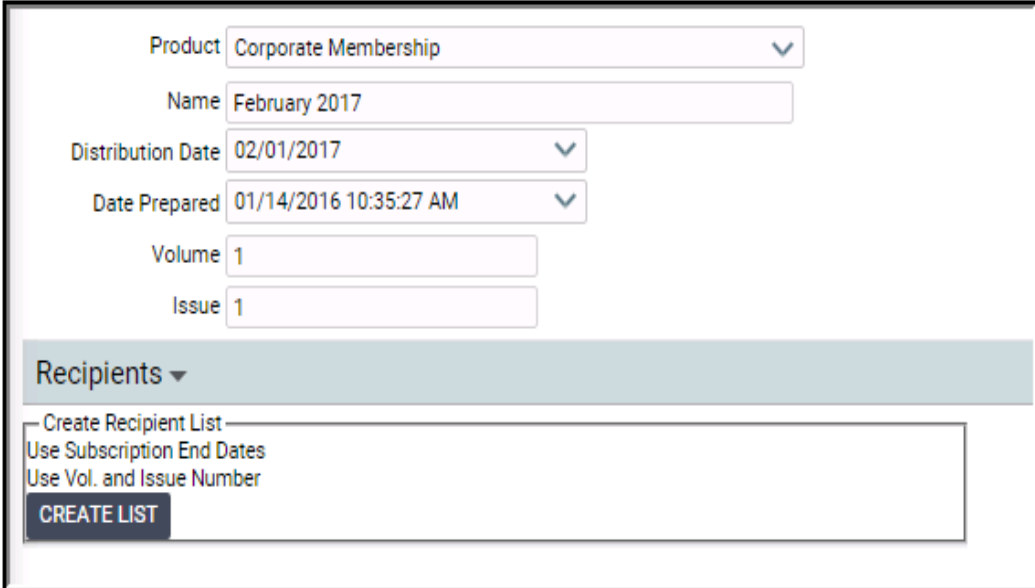
The Subscription Fulfillments service enables you to track the distribution of a subscription's issue, specifying the distribution date, volume, and the recipients. In addition, by processing a subscription fulfillment, mailing labels are automatically generated.

Fulfillment means to send out an issue. A fulfillment is made for all issues sent this month.

Creating the fulfillment generates a mailing label for magazines and decreases a subscription count by one. Subscription Fulfillment is done monthly for each subscription product.

After you run a fulfillment, observe the Output, Mailing Labels to see how the mailing labels will look. You can also go back to the delivery log to observe how an entry is made after fulfillment. You will not be able to use the Output field during fulfillment if you did not make the Delivery Type "Hard Shipment".

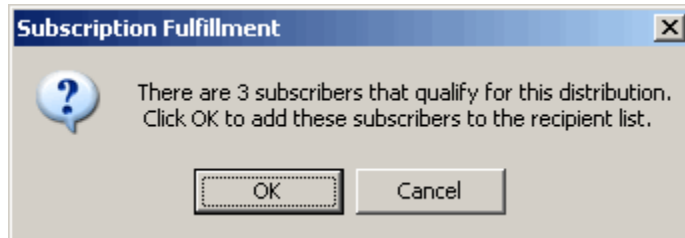
1. From the **Subscription Management** application, click to open the **Subscription Fulfillments** service and open a **New Subscription Fulfillments Record**.
2. Select **XYZ Subscription** from the **Product** drop-down menu.
3. Enter next month's date in the **Name** field.
 - For example, if the current month is January 20XX, you would enter **February of the same year** in the Name field.
4. Enter today's date in the **Distribution Date** field.
 - The **Date Prepared** field defaults to today's date.
5. Enter **1** in the **Volume** field.
6. Enter **1** in the **Issue** field.
7. Verify that the **Use Vol. and Issue Number** option is selected (the default setting).



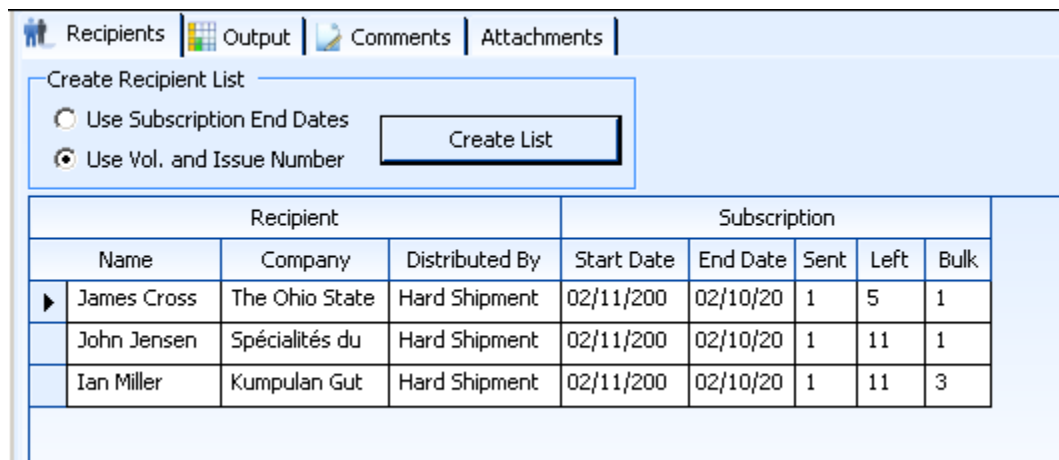
The screenshot displays a web form for creating a new subscription fulfillment record. The form includes the following fields and sections:

- Product:** A dropdown menu currently showing "Corporate Membership".
- Name:** A text input field containing "February 2017".
- Distribution Date:** A date picker dropdown showing "02/01/2017".
- Date Prepared:** A date and time picker dropdown showing "01/14/2016 10:35:27 AM".
- Volume:** A text input field containing "1".
- Issue:** A text input field containing "1".
- Recipients:** A section with a dropdown arrow, containing a "Create Recipient List" button and two checkboxes: "Use Subscription End Dates" and "Use Vol. and Issue Number".
- CREATE LIST:** A prominent button at the bottom of the Recipients section.

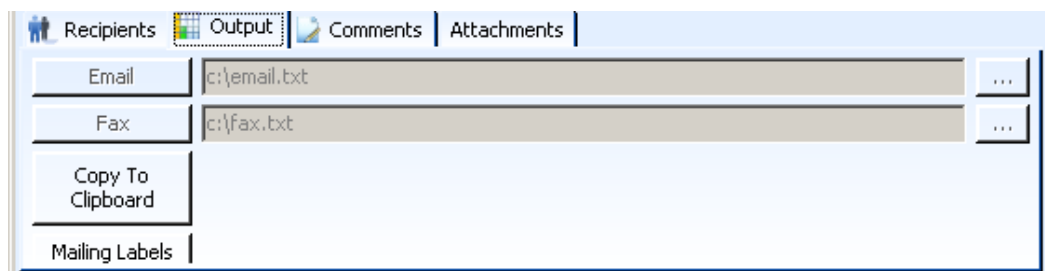
8. Click the **Create List** button.
 - A dialog box appears that informs which people qualified for this distribution.



9. Click **OK**.
 - The record is saved automatically and an ID number is assigned.
 - The qualified recipients appear under the Recipient tab. You should see the following information if you completed the earlier exercises in this lab:
 - 1 issue was sent to your **Person**, leaving 11 remaining.
 - 3 copies of the item were sent to your **Person**, who had a bulk subscription.
 - 1 issue was sent to your **Person**, leaving 5 remaining (since you canceled half of the original order in an earlier exercise).

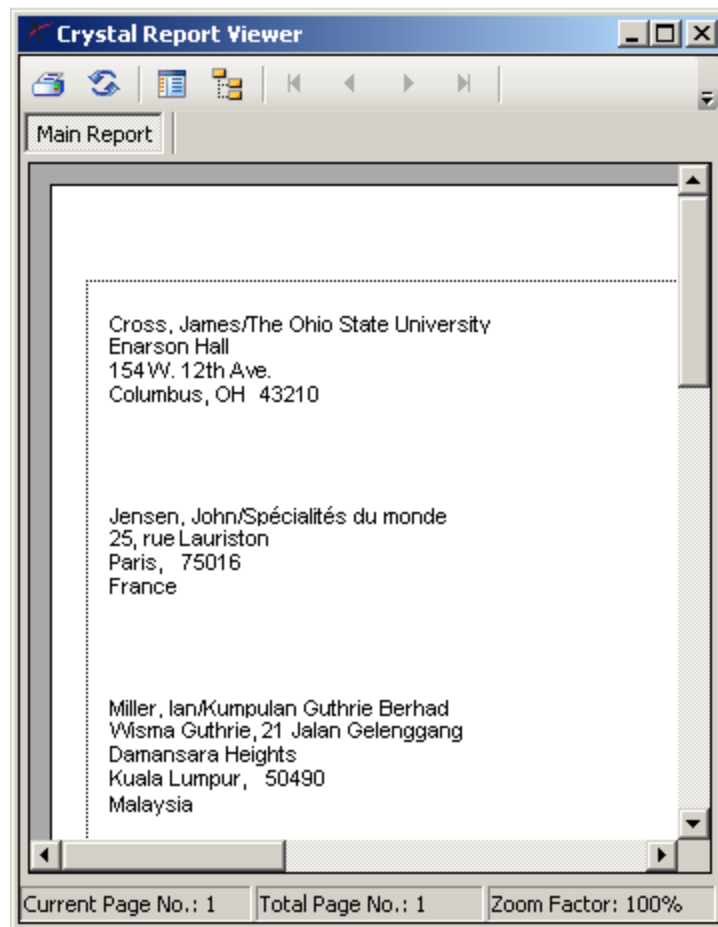


10. Click the **Output** tab.



11. Click the **Mailing Labels** button. (This option is applicable for hard shipment subscription products.)

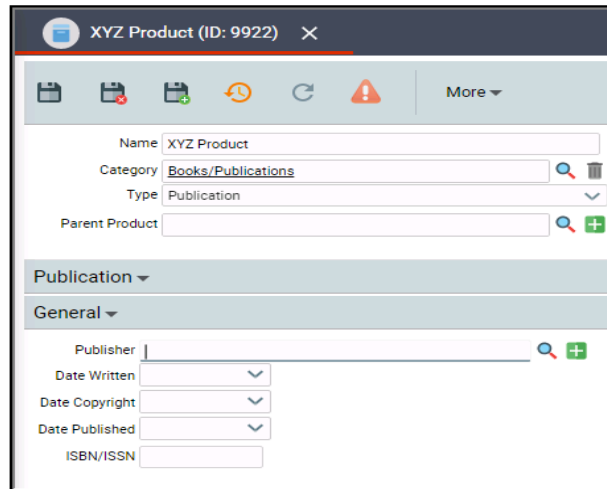
- This opens the Report wizard for the Subscription Fulfillment service, which includes a standard subscription fulfillment label report. This report displays the address for each recipient so they can be printed to mailing labels.
- Within the Report wizard, click the **Labels** tab.
- Select the **Subscription Fulfillment Label Report** and click **Next**.
- Click **Finish** to display the mailing labels for the recipients.



12. Close the **Subscription Fulfillment Label Report** window.
13. Save and close the **Subscription Fulfillments** record.

Creating a New Contributors Record

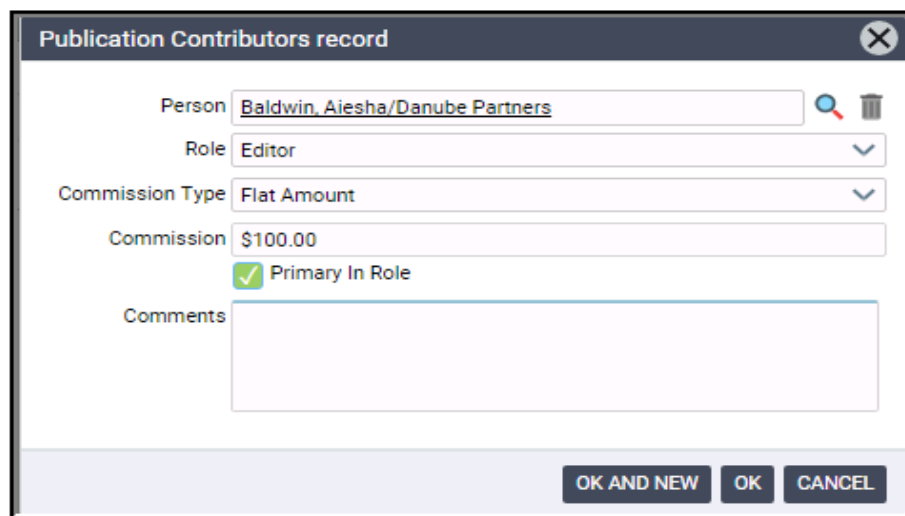
1. On **XYZ Product** record, select the **Publications** tab.
2. Select the **General > Publication Contributors** sub-tab.



The screenshot shows the 'XYZ Product (ID: 9922)' record interface. The 'Publication' tab is selected, and the 'General' sub-tab is active. The form displays the following fields:

- Name: XYZ Product
- Category: Books/Publications
- Type: Publication
- Parent Product: (empty)
- Publisher: (empty)
- Date Written: (dropdown)
- Date Copyright: (dropdown)
- Date Published: (dropdown)
- ISBN/ISSN: (empty)

3. Click the **New** button to open a new Publication Contributors record.
4. In the **Person** field, enter your **Person**.
5. From the **Role** drop-down menu, select **Editor**.
6. Leave **Commission Type** set to **Flat Amount**.
7. In the **Commission** field, enter **\$100.00**.
8. Leave **Primary In Role** selected (person is primary editor of the publication).

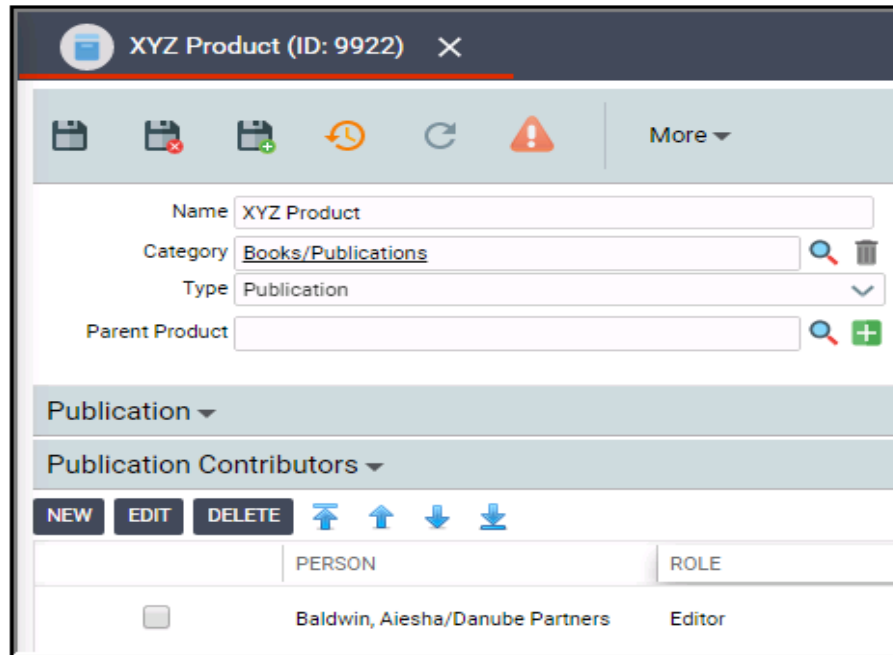


The screenshot shows the 'Publication Contributors record' form with the following fields and values:

- Person: Baldwin, Aiesha/Danube Partners
- Role: Editor
- Commission Type: Flat Amount
- Commission: \$100.00
- Primary In Role:
- Comments: (empty text area)

Buttons at the bottom: OK AND NEW, OK, CANCEL

9. Click **OK**.
 - The contributor's record is added to the Publication Contributors tab.



The screenshot shows a web application interface for managing a product. The title bar indicates the product is 'XYZ Product (ID: 9922)'. Below the title bar is a toolbar with icons for save, delete, add, refresh, and warning, along with a 'More' dropdown menu. The main form area contains the following fields:

- Name: XYZ Product
- Category: Books/Publications
- Type: Publication
- Parent Product: (empty)

Below the form, there are two tabs: 'Publication' and 'Publication Contributors'. The 'Publication Contributors' tab is active, showing a table with the following data:

	PERSON	ROLE
<input type="checkbox"/>	Baldwin, Aiesha/Danube Partners	Editor

10. Click the **Publication > Prices** tab and add prices for the product.
11. **Save** and **Close** the record.

F SQL Value Statements for Views

Objective

Users will be able to:

- Insert SQL Statements into View Filter Value fields to create links to Dates and Employee IDs

Overview

Following Page contains the filter values that can be inserted for

- Dates
- Employee IDs
- Sounds-Like
- LastName = '<PROMPT....>'
- Becomes
- SOUNDEX(LastName) = SOUNDEX('<PROMPT.....>')
- This allows you to do "sounds like" instead of begins with / exactly matches, etc.ValueOperator
- UsedResults
- Prompted Proximity

EMPLOYEE_NAME (Operator = Exactly Matches) - Returns the records associated with the current user's employee name. This will return a blank value if the user does not have an associated employee record.

EMPLOYEE_ID - Returns the records associated with the current user's Employee ID. This will return a blank value if the user does not have an associated employee record.

SUSER_NAME or

SUSER_NAME() or

CURRENT_USER or

SUSER_SNAME or

USER

Use Exactly Matches as the Operator to Return the records associated with the current user's SQL user name.

TODAY or

GET DATE or

NOW + or - number of days Returns today's date plus or minus the number of days following

Setting Up User Profiles

Aptify users are added to the database by using the Aptify User Administration Wizard. As a step in user creation (step 6 of the Wizard) each New Aptify client administrator should copy the **Baseline** profile. Once copied, the Baseline profile can then be modified as a second, renamed profile (such as Customer Service Representative). Subsequent users with that same function should copy the new (e.g. Customer Service Representative) profile.

By copying a profile, an administrator, through the Aptify User Administration Wizard causes the new user to inherit the previous profile's **metadata**. That metadata is composed of specific **Dashboards**, **Views**, personal **Navigation** settings, **Application** and **Services** displayed, and **Group Security** settings. Each new profile an administrator creates should be built by adjusting the Baseline User's, copied profile. This effectively means the administrator must login as the new profile, adjust its metadata to reflect a specific department or function, log out, and disconnect the license. A disconnected license does NOT disable the profile - it simply makes the license available for future allocation to a new user.

By carefully setting up these profiles from the Baseline profile, administrators significantly jump start the Go-Live capabilities of their end users. Those users now have focused Views, Shortcuts, and Dashboards and other metadata that reflect their department/functions needs.

It is VERY important to note that by using the Baseline profile as the starting template, Administrators avoid copying and proliferating unnecessary views. The Baseline profile's views are connected to the **Baseline Administrator's** owned views via Shared Folders. By copying the Baseline profile and using it as a template, the Administrator does NOT copy the views, only the Shared Folder connections. Since the Baseline profile owns NO views, there is no increase in the total number of views in the database.

The setup and copying of the Baseline profile is an Administrator function, but it is critical that each department review the major metadata components that should be specifically configured for them via a profile: **Dashboards**, **Views**, personal **Navigation** settings, **Application** and **Services** displayed, and **Group Security**. After reviewing, the end users can then contribute, through a series of meetings, what components need to be added.

Post Go-Live: An organization's department leaders should meet regularly to review which views, shortcuts, and dashboards and other metadata should be included in a profile, and work with administrators to update the profile as necessary so that new users are able to begin working with Aptify more easily.

IMPORTANT: The specific copying/setup of profiles, shared folders, and the use of the Baseline and Baseline Administrator profiles is covered in the Administrator class.

