



End User Training Manual

Version 5.5.1

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Objective

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

- Introduction to End User Training
- Learning Initial Aptify Display, the Dashboard Contents
- Understanding Basic Aptify Terminology
- Connecting to Aptify
- Displaying the Folder List
- Adding Applications
- Removing Services
- Working with Shortcuts
- Viewing the Exception Log
- Using the Help Menu
- About Recently Used Records

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 many types 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, and in doing so, Subject Matter Experts (SME's) will have the knowledge to prepare to move into the next phase of the Aptify implementation process in a more efficient and effective manner.

Additionally, this manual provides information that can 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.**

How Aptify Should be Used

Aptify is designed to display data from multiple departments 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.

Setting up Aptify

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 will 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, a user inherits the previous profile's metadata. In terms of end users, metadata is composed of the Dashboards, Views, and personal Navigation settings. Each new profile should be built by adjusting the Baseline User's, copied profile. The new profile, when completed, should reflect that department's function.

By carefully setting up 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 that reflect their department/functions needs.

The setup and copying of the Baseline profile is an Administrator function, but it is critical that each department review the existing components: Dashboards, Views, Shortcuts of the Baseline profile. After reviewing, the end users can then contribute, through a series of meetings, what components need to be added.

Navigating Aptify

Aptify should be navigated by using Shortcuts, Dashboards, and Views. Users will always enter Aptify via the Home Dashboard. Users can then employ their Dashboard shortcut bar, Services shortcuts, Views shortcuts, and/or Dashboard buttons to navigate to the data. Users should utilize Prompted List Views to find data, and focused Wizards tied to Dashboard buttons, to enter new data. 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 and is built around the following hierarchy:

- Applications
- Services
- Records
- Views
- Shortcuts
- Dashboards

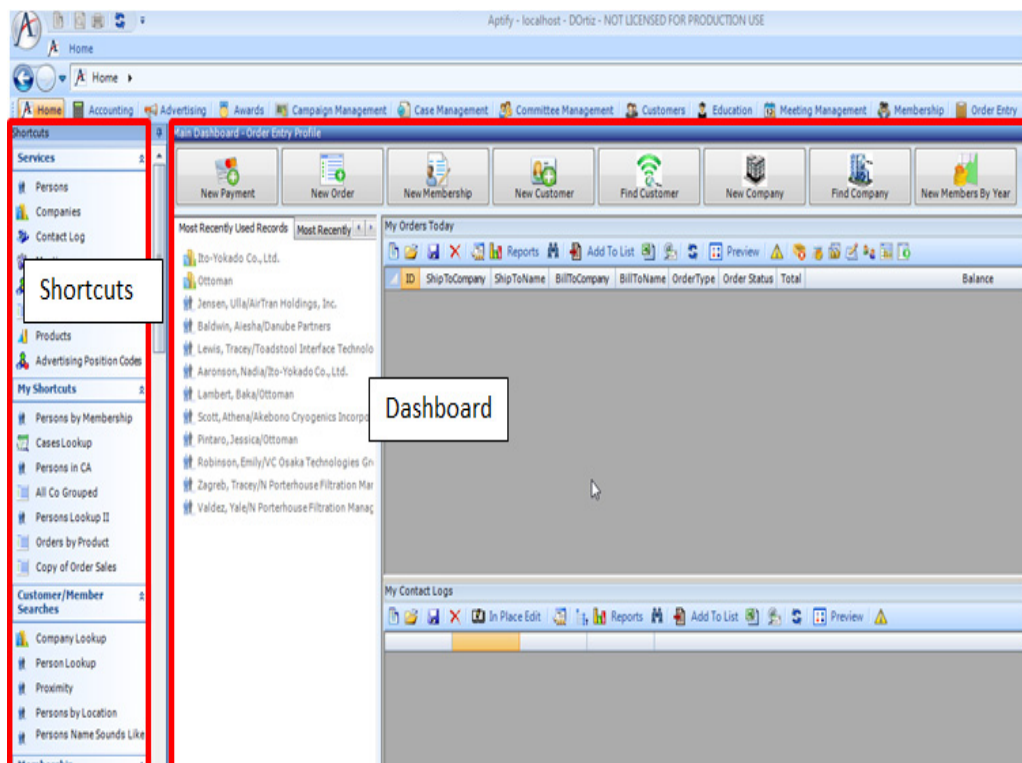
Initial Aptify Display

When Aptify opens, users automatically land on the **Home Dashboard**. The Home dashboard serves as a consolidated functional/viewing area that reflects the user's main tasks and data needed to use often. The Home dashboard should be configured, via the user's profile, to mirror the user's department/function within the database. For many users, this and 2-3 additional dashboard applications, will be all the access needed. Home should have a **Button Bar** tied to it that reflects the user's function. For instance, a customer service rep's Home could have a New Order, New Member, Find Member, etc., buttons, while, an accounting user's Home Dashboard might have New Order Batch button, New Payment, Find Payment buttons.

Home should also have multiple, embedded **Views** that reflect the user's most important daily functions. A customer service rep might see 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.

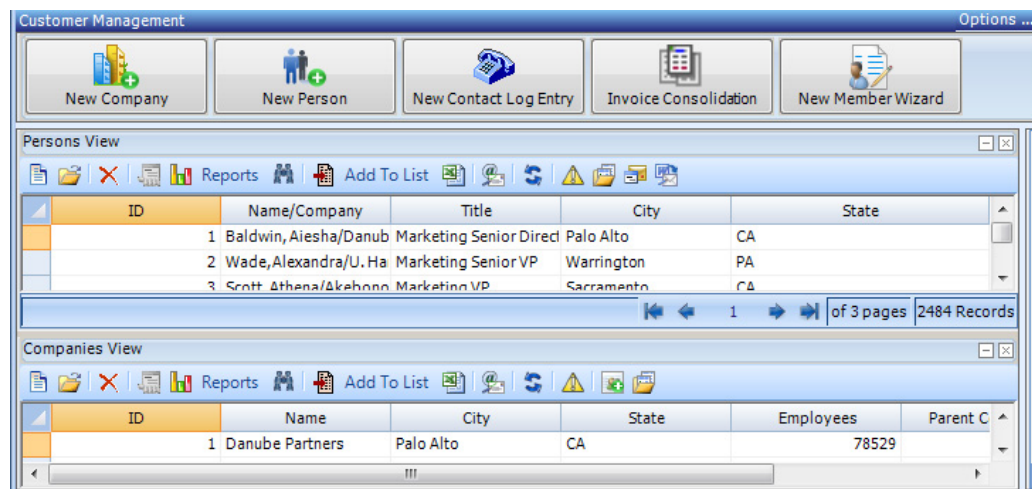
Shortcuts, appear on the left-hand side, will display no matter where the user navigates. They should also reflect a focused usage on the user's main functions.

Users in the **Training database** will be working with the **Baseline** user's Home Dashboard. The Baseline profile encompasses ALL base Aptify functionality. As such, it reflects the most widespread usage across multiple departments. When users go-live with Aptify, they will encounter a more focused, configured Home dashboard suited to their needs. Training users also have an embedded Recently Used Records part in their Home Dashboard which will be explained during training and in the following chapters. Home Display:



Digital Dashboards

A dashboard is a gateway for accessing information related to a particular application. Administrators can customize dashboards to provide a single interface for commonly used tasks. For example, a **Customer Management** dashboard could include targeted views of the Persons and Companies services, with buttons that open a New Company, New Person, New Contact Log Entry, Invoice Consolidation, or New Member Wizard. Dashboards should contain the most critical summary Views and the most frequently used functions (buttons) per Application. They should be each department's landing page in the system.



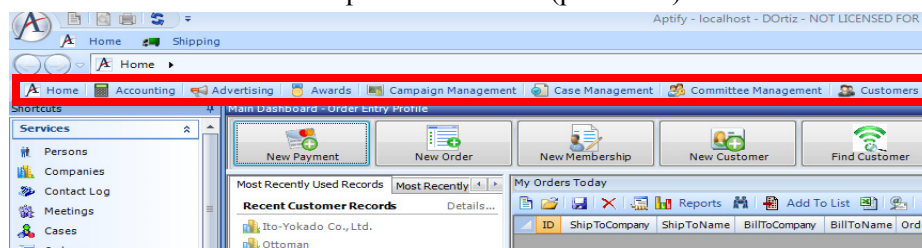
Dashboard Buttons

Dashboards are made up of Areas composed of **Parts**. The two most commonly used Parts are **Views** and **Buttons**. Buttons are extremely valuable because they can be tied to diverse functions and are easily viewable/accessible. Below is a list of button functions:

- New Form (Persons, Company, Member record, etc)
- Find
- Wizard - simplified form entry
- Additional Dashboard
- View
- Report

Dashboard Shortcut Bar

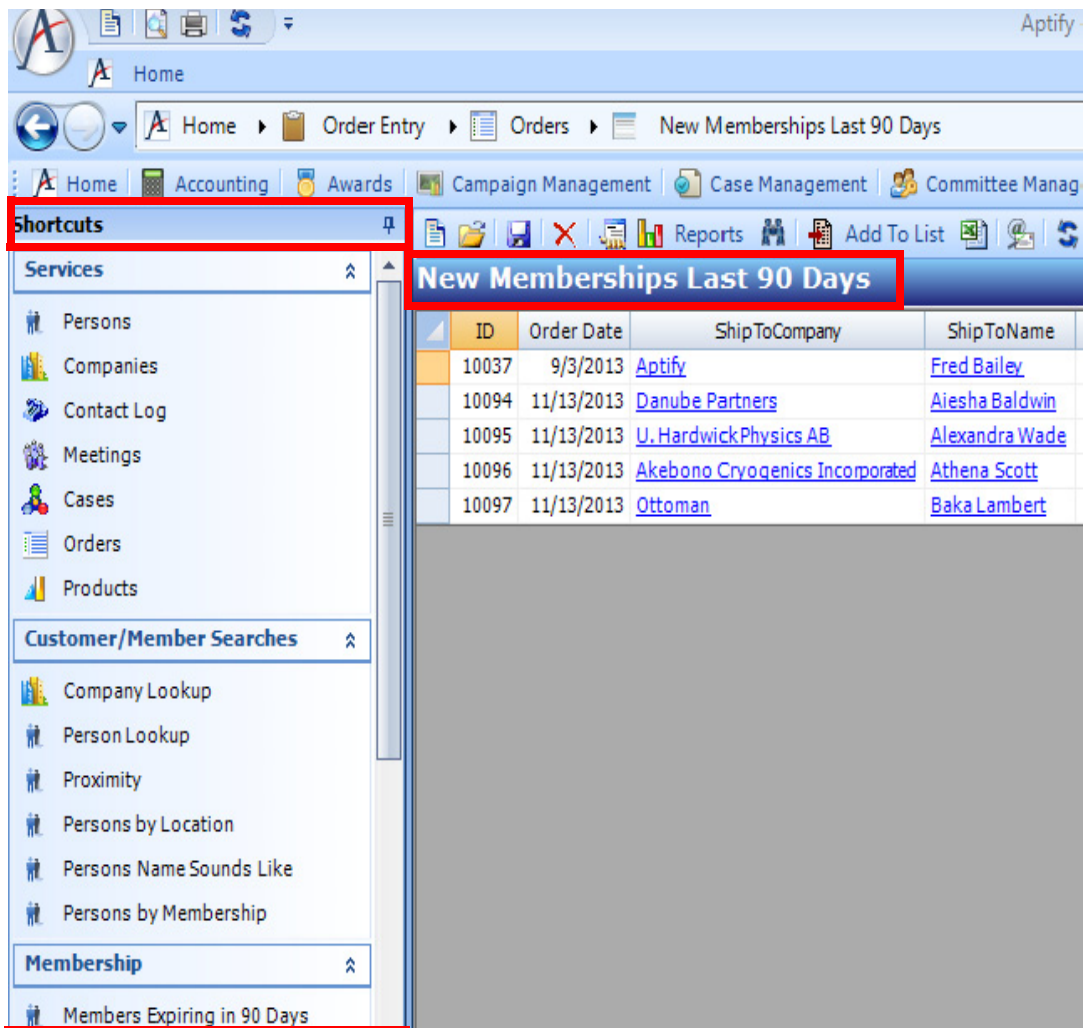
The Dashboard Shortcut Bar enables users to easily navigate between Dashboards. It will contain a dashboard shortcut per each enabled (permitted) user dashboard.



Shortcuts

Shortcuts are embedded Groups and Links that display initially on the left-hand side of the screen. They are designed to organize Groups of quick links per function/department for instant usage. They are most often tied to Views (specific queries of the data) and Services. They enable users to save their most common looks into the data. They are invaluable for quick navigation and, along with Dashboards, are the primary navigation aids in the system. Shortcuts should be configured according to the user's profile and should be tied to their specific department/function.

It is strongly recommended that Shortcuts be tied to Shared Folders that are governed by Department or Function based Administrators - see Ch. 5 for details.



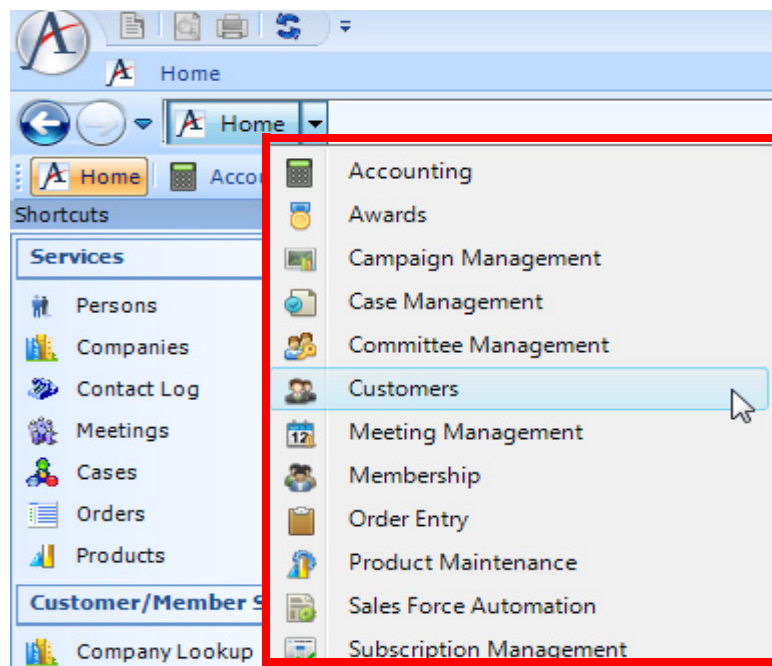
The screenshot displays the Aptify software interface. On the left, a navigation sidebar is visible, with the 'Shortcuts' section highlighted in red. This section is divided into three categories: 'Services', 'Customer/Member Searches', and 'Membership'. The 'Services' category includes links for Persons, Companies, Contact Log, Meetings, Cases, Orders, and Products. The 'Customer/Member Searches' category includes Company Lookup, Person Lookup, Proximity, Persons by Location, Persons Name Sounds Like, and Persons by Membership. The 'Membership' category includes Members Expiring in 90 Days. The main content area on the right shows a table titled 'New Memberships Last 90 Days', which is also highlighted in red. The table has columns for ID, Order Date, ShipToCompany, and ShipToName. The data rows are as follows:

ID	Order Date	ShipToCompany	ShipToName
10037	9/3/2013	Aptify	Fred Bailey
10094	11/13/2013	Danube Partners	Aiesha Baldwin
10095	11/13/2013	U. Hardwick Physics AB	Alexandra Wade
10096	11/13/2013	Akebono Cryogenics Incorporated	Athena Scott
10097	11/13/2013	Ottoman	Baka Lambert

Using Aptify

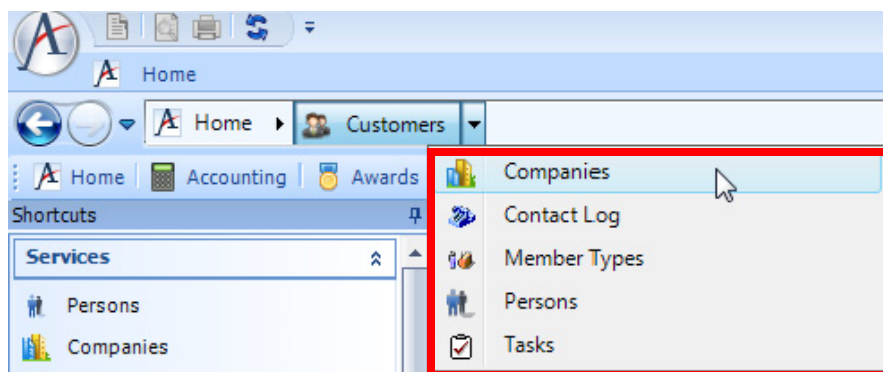
Applications

Applications are sectioned areas of the database that organize related services to functional area of the system. For example, the Customers application maintains customer information and contains **Services** such as Companies, Contact Log, Members Types, Persons, & Tasks.



Services

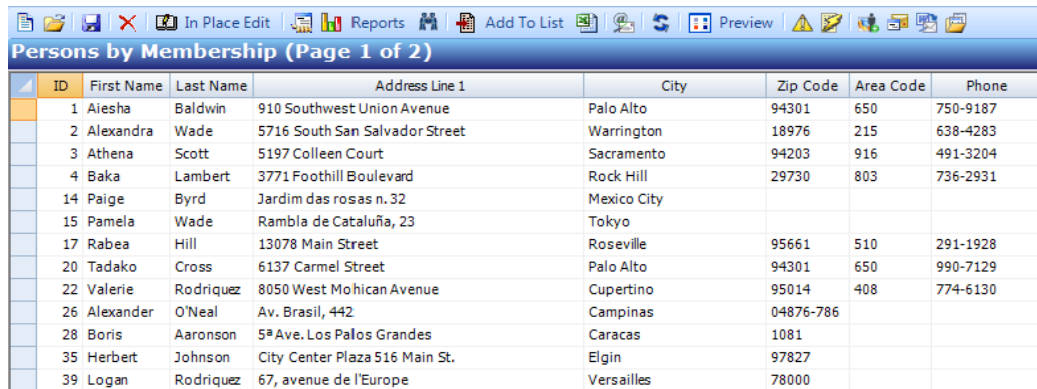
Services refer to a type of record. Each service corresponds to one collection of data; for example, the **Companies** service maintains information about the companies with which a user's organization interacts. Note that when switching applications, Services remain the same. A service is technically known as an **Entity**.



Views

Views are displays of information from a subset of the records within a particular service. The most commonly used type of View is the List View. Users or administrators can specify the type or amount of data the view displays. For example, the list view below displays **All New Memberships added in the Last 90 Days**. Once created, views are saved within each user's profile for future use and can be distributed via shared folders to other users.

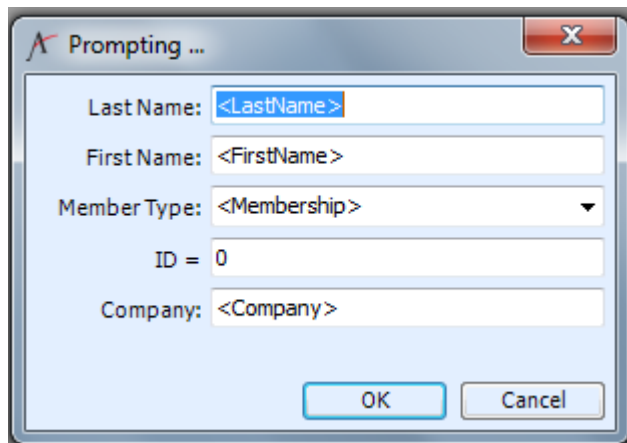
Views are the center of the Aptify system. They are used both to access data records and to communicate that data through shared dashboards and reports.



ID	First Name	Last Name	Address Line 1	City	Zip Code	Area Code	Phone
1	Aiesha	Baldwin	910 Southwest Union Avenue	Palo Alto	94301	650	750-9187
2	Alexandra	Wade	5716 South San Salvador Street	Warrington	18976	215	638-4283
3	Athena	Scott	5197 Colleen Court	Sacramento	94203	916	491-3204
4	Baka	Lambert	3771 Foothill Boulevard	Rock Hill	29730	803	736-2931
14	Paige	Byrd	Jardim das rosas n.32	Mexico City			
15	Pamela	Wade	Rambla de Cataluña, 23	Tokyo			
17	Rabea	Hill	13078 Main Street	Roseville	95661	510	291-1928
20	Tadako	Cross	6137 Carmel Street	Palo Alto	94301	650	990-7129
22	Valerie	Rodriguez	8050 West Mohican Avenue	Cupertino	95014	408	774-6130
26	Alexander	O'Neal	Av. Brasil, 442	Campinas	04876-786		
28	Boris	Aaronson	5ª Ave. Los Palos Grandes	Caracas	1081		
35	Herbert	Johnson	City Center Plaza 516 Main St.	Elgin	97827		
39	Logan	Rodriguez	67, avenue de l'Europe	Versailles	78000		

Prompted Views

The most effective everyday use of Views are **Prompted List Views**. Prompted List Views enable users to interact with the data by making choices as to the values a View (query) will use to run. The example below is of a **Persons Lookup** Prompted List View.



Prompting ...

Last Name: <LastName>

First Name: <FirstName>

Member Type: <Membership>

ID = 0

Company: <Company>

OK Cancel

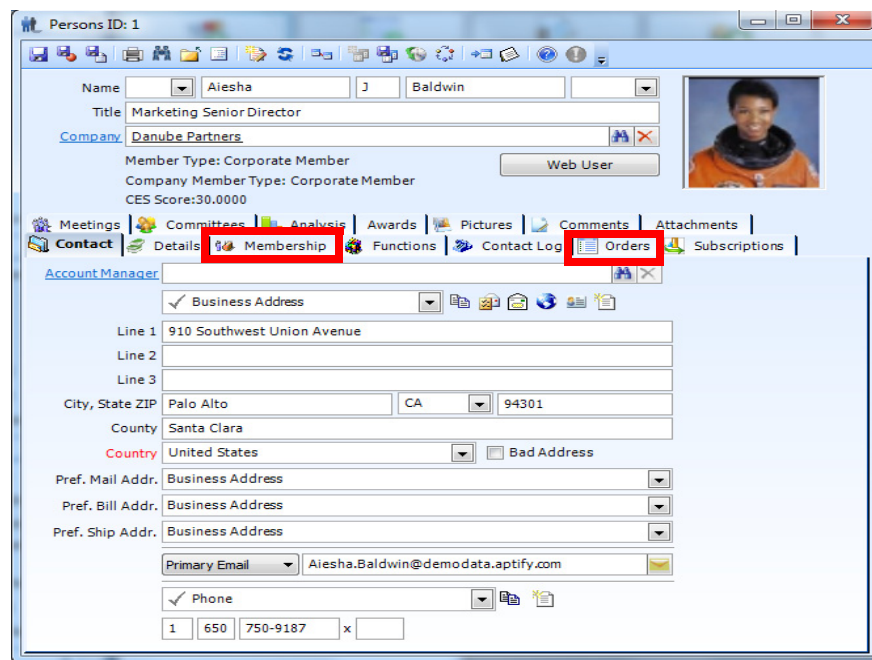
Records

Records are entries in a service with a unique ID. Every Service in Aptify has associated records. Each Record contains multiple tabs that contain unique information concerning the particular record.

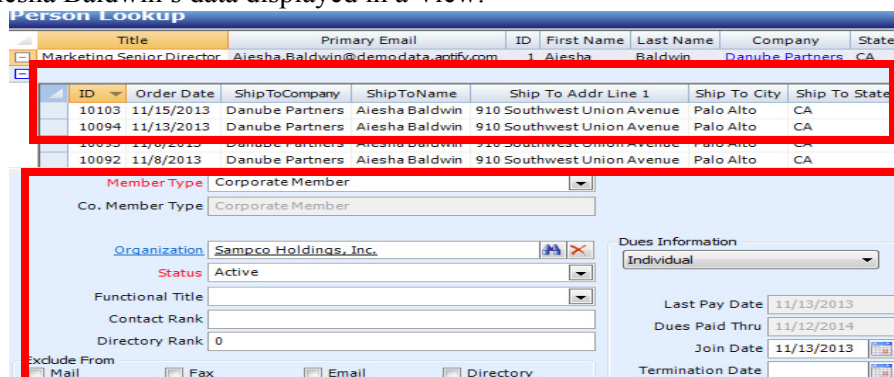
However, records do NOT have to be opened to display valuable data. Embedded, record data can be presented much more effectively and concisely using Views. In Views, users can display focused, particular data from a record. Utilizing View features, such as the Fields tab, Hierarchy tab, and the Preview Pane function (see Ch. 4 & 5), users can avoid opening densely, data packed record forms.

In the example below, only partial data of Aiesha Baldwin is viewable by opening the form. Users would need to navigate to additional tabs to see Membership and Orders information. In a correctly configured View, that data is already present via its fields and a Preview Pane.

Aiesha Baldwin’s Persons record:

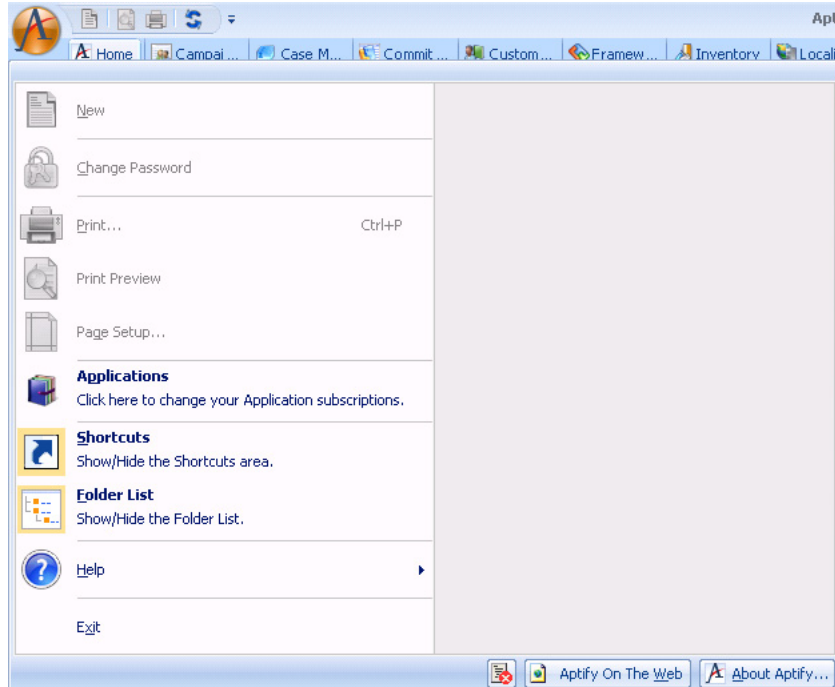


Aiesha Baldwin’s data displayed in a View:



Aptify Button

The Aptify Button is a centralized area for controlling several facets of the user's navigation in Aptify. Once comfortable with Aptify's uses, it may not be necessary for users to return to the Aptify button very often.



- **New:** This option opens a new record in the currently selected service. (The option is grayed out if a user has an application selected.) This provides the same functionality as the **New** button on the Quick Access toolbar.
- **Change Password:** This option allows users who are not using Windows Integrated Security to change their Aptify password (when applicable).
- **Print:** Prints the view currently displayed in the main display area. Note that if printing a list view that has multiple pages, only information from the currently displayed page is printed. This provides the same functionality as the **Print** button on the Quick Access toolbar.
- **Print Preview:** Displays the current view as it will appear when printed. Note that if printing a list view that has multiple pages, only information from the currently displayed page is previewed/printed.
- **Page Setup:** This options allows a user to set up a view's print options.
- **Applications:** Select this option to open the application selection dialog to add or remove applications.
- **Shortcuts:** This option toggles the Shortcut Bar so user can add or remove it from the Aptify Desktop.

- **Folder List:** This option toggles the Folder List so a user can add or remove it from the Aptify Desktop.
- **Help:** This option provides access to the Aptify online help documentation.
 - **Contents:** Selecting this option, or clicking **F1** on the keyboard, opens the Aptify 5.5 online help documentation. **Note that the specific page that displays depends on what application is currently selected.** The page's location is displayed in the Help Table of Contents.
 - **Index:** Selecting this option, or clicking **Ctrl+F1** on the keyboard, opens the Index tab of the Aptify 5.5 online help documentation.
 - **Search:** Selecting this option, or clicking **Ctrl+Shift+F1** on the keyboard, opens the Search tab of the Aptify 5.5 online help documentation.
- **Exit:** Closes Aptify. Users can also double-click the Aptify Button.
- **Session Exceptions:** This option opens the Session Exceptions viewer which records errors generated by Aptify during the current session.
- **Aptify On The Web:** This option opens the Aptify home page in a Microsoft Internet Explorer window.
- **About Aptify:** This option opens a window that displays information about the version of Aptify that is running.

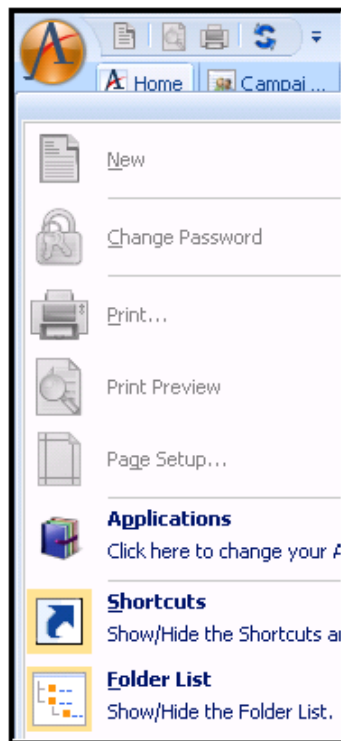
Folder List

The Folder list is a hierarchical display of Aptify's applications, services, and views. It is basically a Site Map for Aptify akin to Windows Explorer. However, 95% of the functionality found in the Folder List can be also accessed via other methods which are explained in this manual.

By default, the Folder List does not display for end users. Once accessed it should be closed since it occupies valuable display space and does not need to be used on a daily basis.

If temporarily needed, users can follow these steps to display or hide the Folder List:

1. Click the **Aptify Button** to display the menu.



2. Select **Folder List** to display the Folder List.
 - Users can pin/unpin the Folder List by clicking the **pin icon** in the upper right corner. The Folder List slides to the left when not in use.

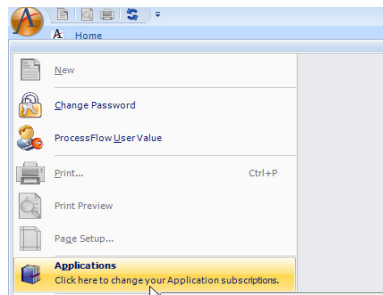
Users can change the Folder List's width by placing the cursor on the right border of the Folder List's frame, until the cursor becomes a double arrow. Users may then drag the edge of the Folder List to the left or right.

Adding Applications

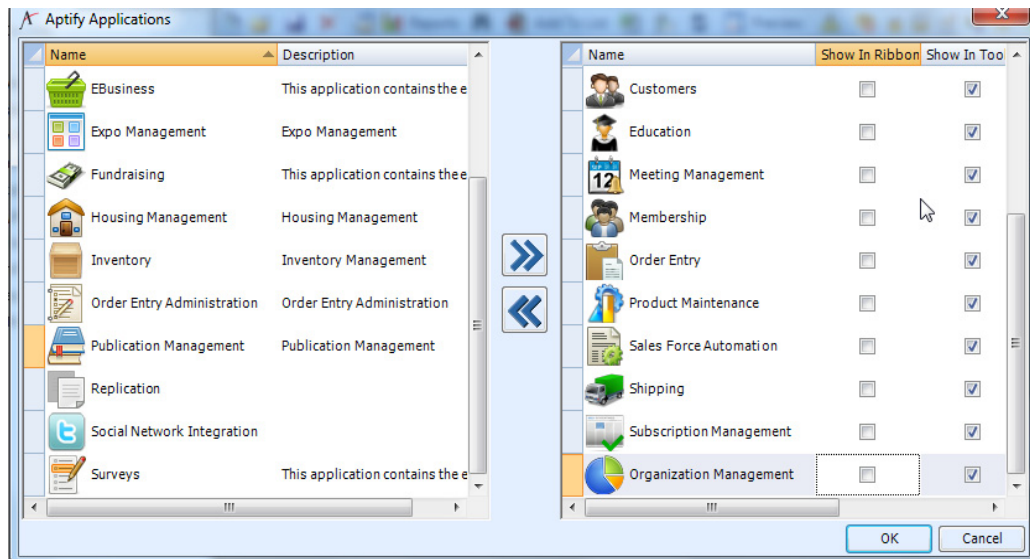
Applications are a logically grouped collection of services that correspond to a job function, and appear below the **Home** heading in the Folder List. Users can add and remove applications to save space on screen; removing an application does not delete any data. It would be unusual for a user to need to add/delete Application access as this should be done by a SA.

Follow these steps to select only applications needed:

1. From the **Aptify Button** menu, select **Applications**.



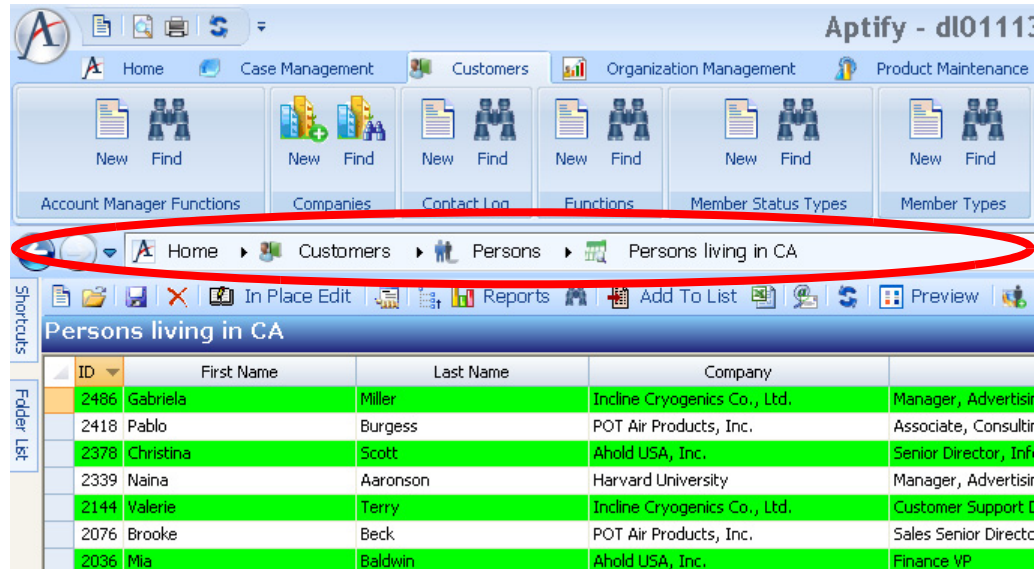
2. The system displays the **Applications** dialog box.
3. From the left-hand window, double-click the **Organization Management** application to move it to the right-hand window. Users can also use the central arrows to perform this function.



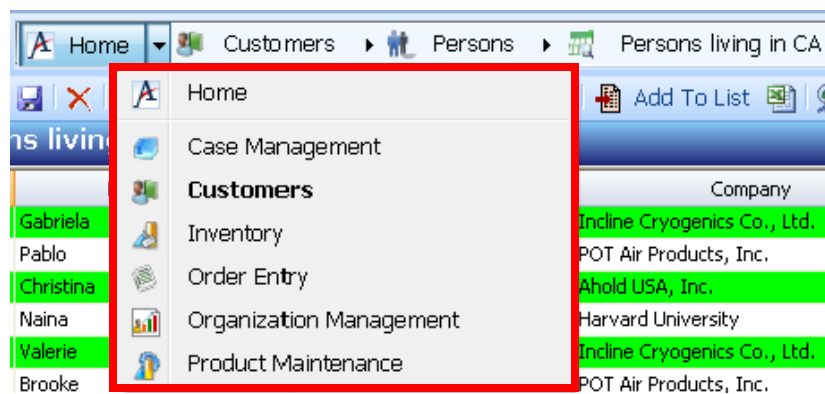
4. To sort the applications in alphabetical order, click the **Application** column header (Name) in either the left-hand or right-hand window. Clicking once sorts the applications in descending order, twice sorts the applications in ascending order.
5. Clear the **Show in Ribbon Bar** checkbox across from Organizational Management. Users may not even need the use of the Ribbon Bar.
6. Click **OK** and **Organization Management** is added to the **Dashboard Shortcut** bar.

Navigation Bar

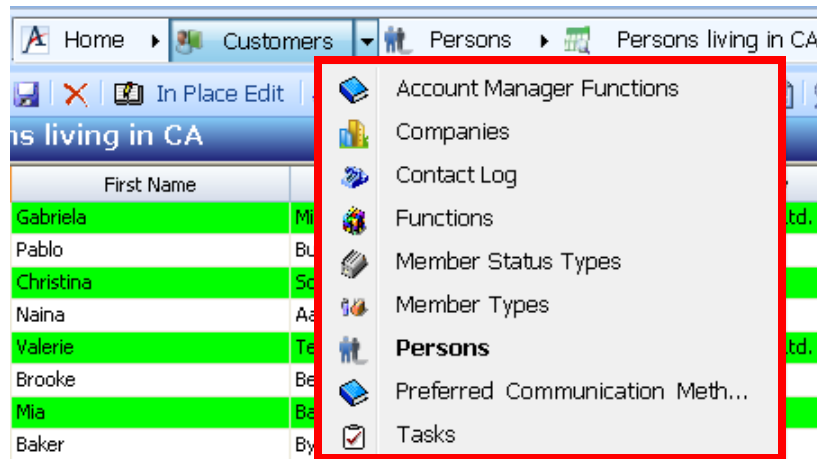
The **Navigation Bar** is a bread crumb bar for navigating to applications, services, and views. It provides a visual indicator of where a user is within Aptify, and may be used in place of the Folder List, which was one of the main navigation tools in previous versions of Aptify. To browse Aptify using the Navigation Bar, click the arrow that appears to the right of an item to display its available options.



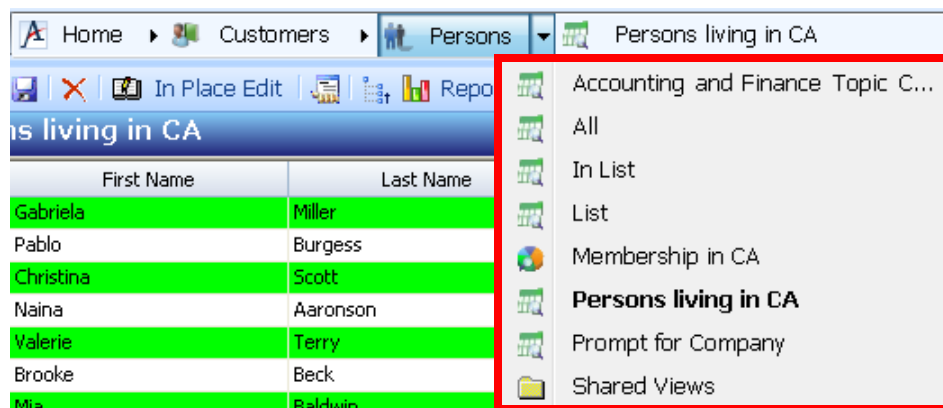
For example, clicking the arrow to the right of the **Home** heading displays all the **Applications** a user has available. Users can specify which applications appear in the Navigation Bar through the Applications dialog. System administrators may also determine which applications are available to the user.



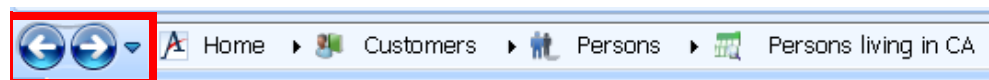
The Navigation Bar displays **Services** to the right of an Application heading. These services contain specific data types and are logically grouped together within a particular application.



The Navigation Bar displays the active **Views** and **View Folders** to the right of a Service heading. The system also displays the list of views and folders available in the main display area when a service heading is selected.



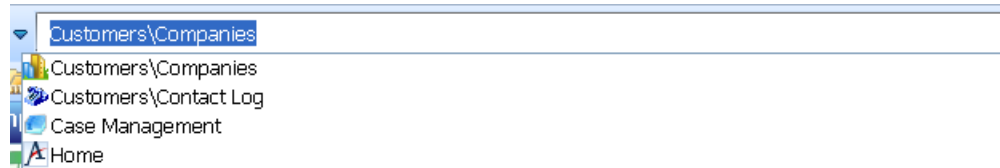
Use the Navigation Bar to navigate from screen to screen within the main display area. Use the arrow buttons and drop-down lists to the left of the Home heading to perform the following:



- **Back:** return to the previous screen in the main display area.
- **Forward:** move forward one screen; this is the same as the Forward button on the main toolbar.
- **Go To:** from a drop-down list, selects a location previously visited during a session to reload that screen.

Advanced users can type directly into the Navigation Bar and enter a location to access if they know the path where the item can be found. To type a location, click to the right of the last item in the Navigation Bar. After typing the desired path, click the **Enter** key.

A user can then navigate to previously typed views, services, or applications, by using the Previous Location drop-down list located on the right side of the Navigation Bar. Selecting a location from this list reloads the previously visited screen during this session. Note that only locations that have been manually typed will appear in this drop-down list.

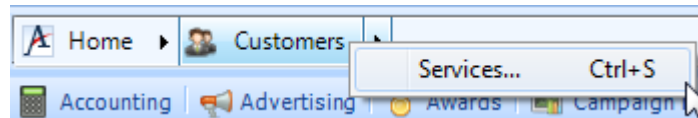


Adding Services

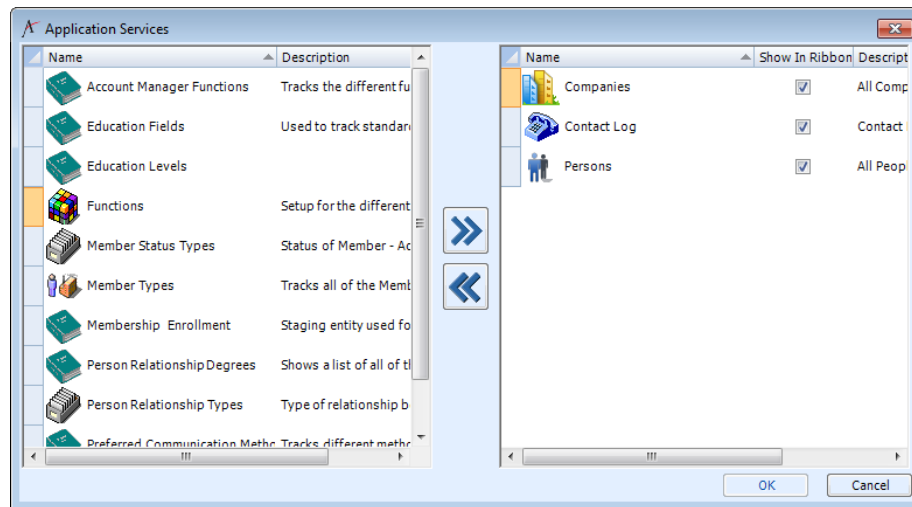
Services appear under Applications and are logically grouped together to correspond to a job function. Services are represented by icons under applications. A user can add or remove services from applications to save space and make it easier to find a particular service.

Follow these steps to remove services from an application. (The steps below refer to removing steps from the **Customers** Service, but they can be applied to any desired service).

1. In the **Navigation Bar**, click the arrow to the right of **Home**
2. From the Application list that displays in the **Navigation Bar**, select **Customers**
3. From the **pop-up list**, *right click* the **Customers** heading and select **Services...**



- The Services dialog displays. The services that currently appear in the Folder List are listed in the right-hand column.



4. Do one of the following to move the Education service to the right-hand column:
 - Double-click the **Education** entry.
 - Click once to highlight the **Education** entry and click the >> button.
5. Repeat the previous step to move the **Functions** services to the right-hand column.
6. Click **OK**.

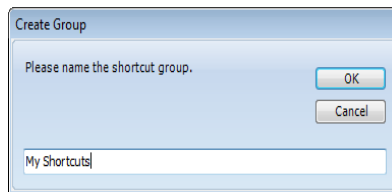
Working with Shortcuts

Shortcuts are one of the most critical areas for end users to utilize to quickly navigate to desired data. Shortcuts enable users to instantly open a service or view. Shortcuts should be created and loaded as part of a profile, but there will be the need to include additional Shortcut Groups and Shortcuts by end users.

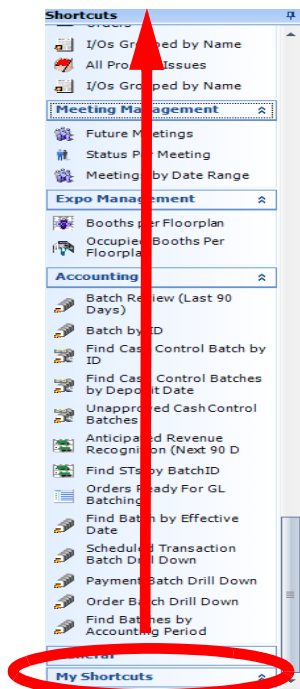
Follow the steps below to add a Shortcut Group and then a Shortcut itself.

Creating a Shortcut Group for Views of data

1. *Right click* the **Shortcut Bar** (under the **Services** group) to activate the area.
 - (Shortcuts to Services is the top level group on the Shortcuts bar to the left.
 - Users can add as many Shortcuts to Views and Shortcut Groups as desired.
2. From the **pop-up list**, select **Add Group**.
3. In the **Name** field, enter **My Views**

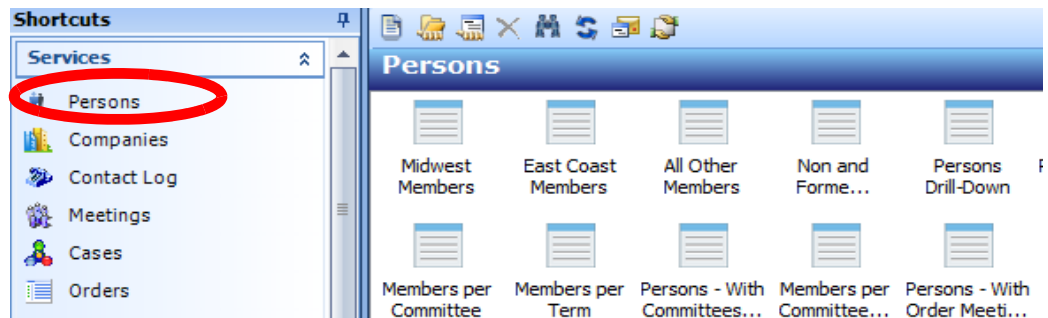


4. Click **OK**- the new group appears at the bottom of the Shortcuts area.
5. Drag the **My Shortcuts** Group to the top of the page under the **Services** Shortcut Group.

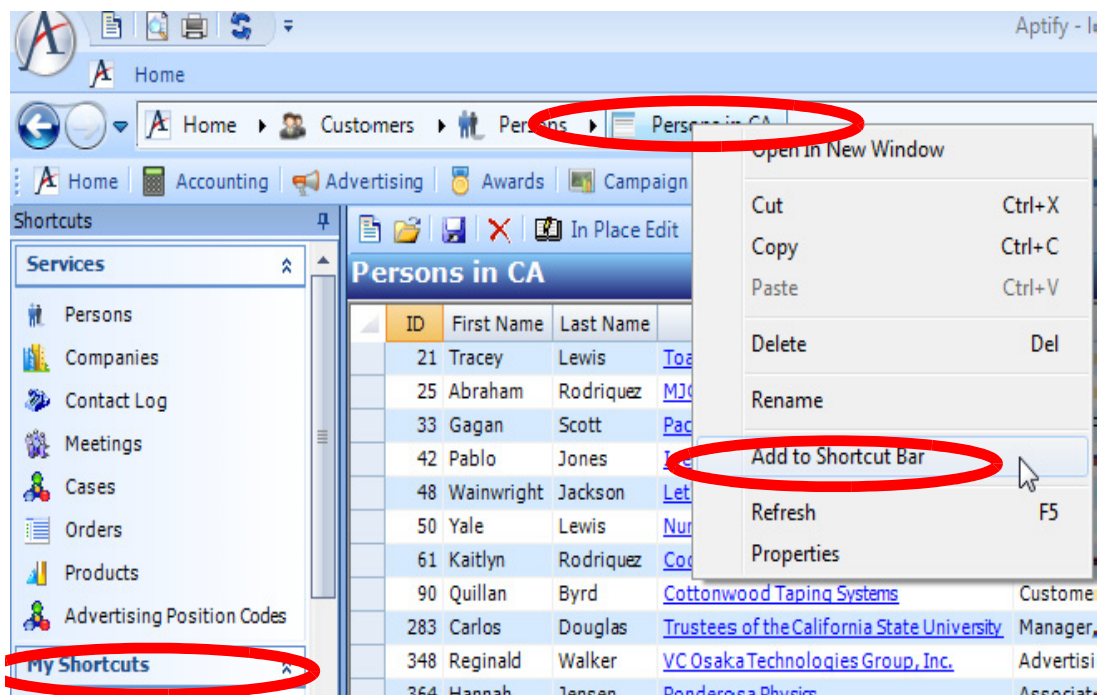


Adding a Shortcut

1. On the left side of the screen, from the **Services** shortcut group, click the **Persons** Service.
2. All the **Persons Views** and **folders** will display on the right.

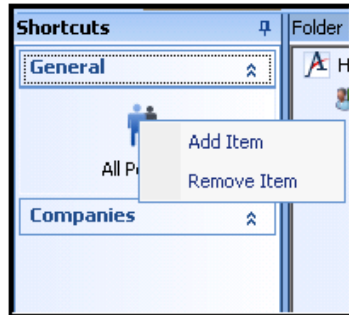


3. Double click ANY existing **View** - the View will run - if a prompt displays, click on the cancel button. Notice that the **View's** name will also display in the top **Navigation Bar**.
4. Click on the **My Views** shortcut group heading created earlier. (Once selected, it will have a selection rectangle). Users **MUST** select the targeted shortcut group prior to selecting the shortcut to be added.
 - It may contract - click again to expand
5. In the **Navigation Bar**, *right click* the displayed **View** name.
6. Select **Add to Shortcut Bar**. Note the addition of the view name under the shortcut group. Repeat to add another view to the My Shortcuts.



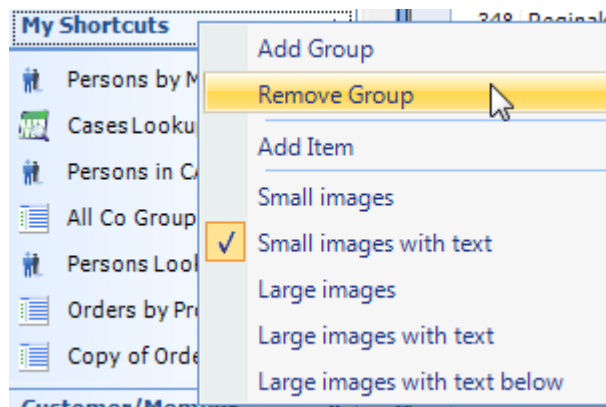
Removing a Shortcut

1. In the **My Views** shortcut group, *right click* the shortcut view.
2. From the **pop-up list**, select **Remove Item**.
3. Click **OK** to confirm the deletion.



Removing a Shortcut Group

1. *Right click* any shortcut Group.
2. From the **pop-up list**, observe the **Remove Group** but do NOT remove the group just created.



Removing a Shortcut Group also removes the shortcuts in that group.

Note: For the transfer of large numbers of shortcuts into a shortcut group, users can open the **Folder List** and drag and drop the shortcut into the desired group. This may be more effective when transferring a large number of shortcuts from a newly connected to Shared Folder.

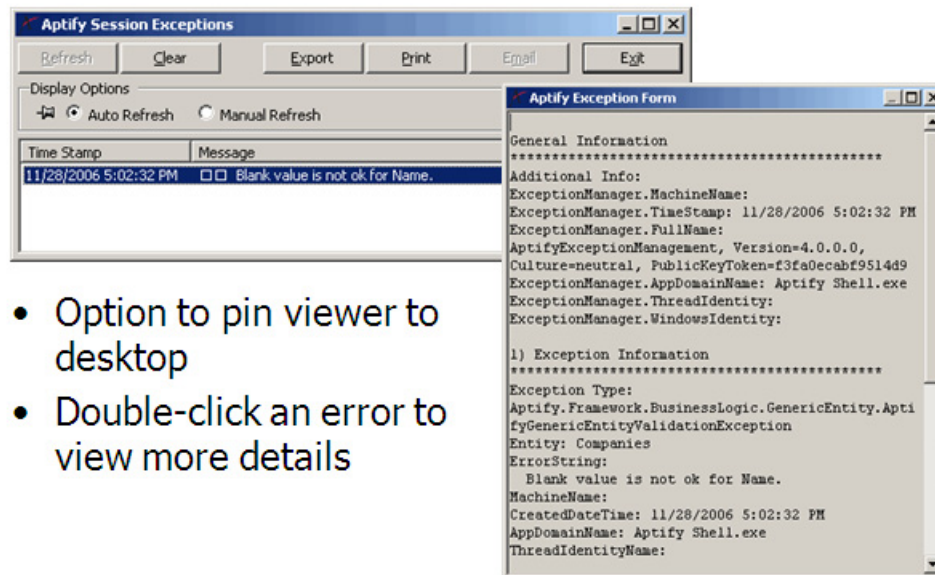
Exception Log

If a problem occurs while using Aptify, the system can record information about the error encountered in the ***Session Exceptions*** viewer; this is found by **clicking the Aptify Button and selecting this option from the drop-down list, (bottom right).**

This information can be very helpful in aiding an administrator to determine what caused the error.

Users can track session errors as they occur by leaving the Session Exceptions viewer open on the desktop, with the **Auto Refresh** option selected. With this setting, errors are automatically added to the Session Exceptions viewer.

When the **Manual Refresh** option is selected, new errors do not appear while the viewer is open until the user clicks the **Refresh** button.



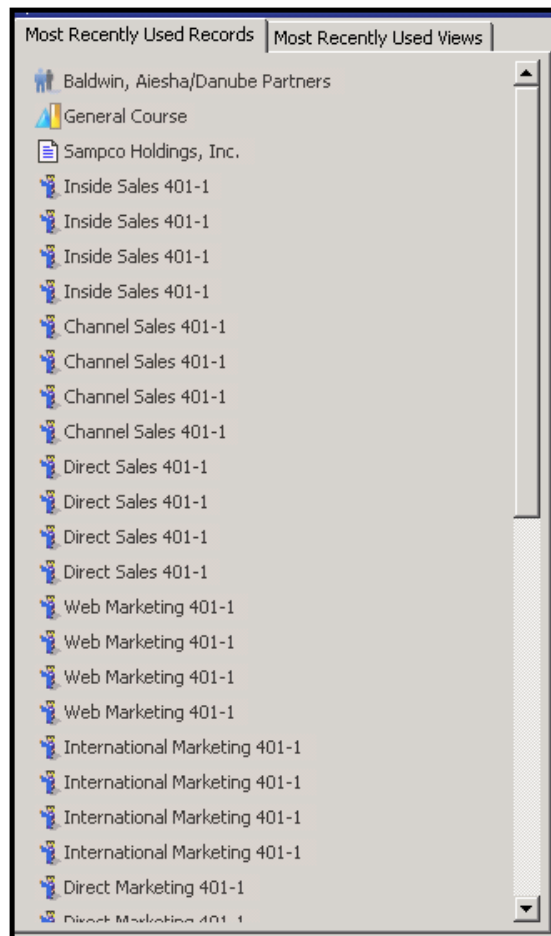
- Option to pin viewer to desktop
- Double-click an error to view more details

To ensure the Sessions Exceptions viewer remains in the foreground of the desktop, click the pin icon. When Auto Refresh is selected and the viewer is pinned to the desktop, users can easily monitor whenever a new error is logged.

Most Recently Used Records/Views

Aptify's main dashboard includes the Most Recently Used dashboard component which provides a quick and easy method to access records/views that are used on a regular basis. This component displays a list of **Records** and a list of **Views** that a user **recently opened or updated** and can display up to 50 items.

Simply double-click an entry in the Most Recently Used Records window to open the corresponding record or view.



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Record Button Bar & Shortcut Keystrokes	2.3
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Organization Accounting.....	2.13

Objective

In this chapter, users will understand how to:

- Read a Record Form
- Create a Companies Record
- Create a Persons Record

Membership Based Records

Aptify recognizes that for most clients, **Companies**, and **Persons** records will be the most frequently entered and interacted with records in the database. For some clients, Aptify’s naming convention will be an adjustment - Companies and Persons, may not equate to what a client knows as Customers or Member records. For others, it will be the fact that the Aptify Database will track ALL TYPES of Companies and Persons, not just Members.

Below are a few basic definitions according to Aptify:

Companies — The businesses with whom the organization (Client) has a business relationship. These companies can be customers, vendors, maintenance contractors, etc. They are the businesses that need to be tracked for various reasons.

Persons — People with whom the organization/association (Client) has a relationship, for example, association members. Most notably these would encompass members, who the user tracks membership related data; these can include vendors, hotels, POCs, etc.

Reading a Record Form

A record refers to a specific group of data in Aptify, while a record's form is the display of that data. All record forms share many common features.

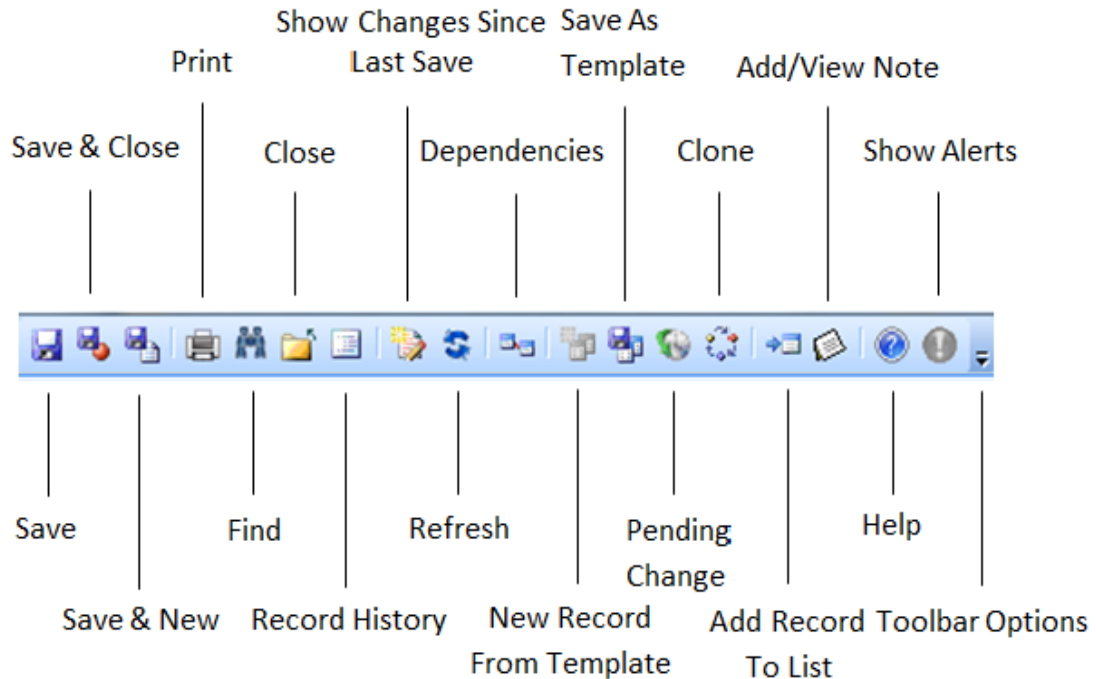
The screenshot shows a web-based record form for a contact. At the top, there is a header area with 'Persons ID: 1' and a 'Data Control Bar' containing various icons for actions like save, print, and search. Below this is a 'Link Box' with a dropdown menu showing 'Persons ID: 1'. The main form area is divided into sections: 'Name' (Aiesha J Baldwin), 'Title' (Marketing Senior Director), 'Company' (Danube Partners), 'Member Type' (Non-Member), and 'Company Member Type' (Corporate Member). A 'Tabs' section at the bottom contains various options like Meetings, Committees, Analysis, Awards, Pictures, Comments, Attachments, Contact, Details, Membership, Functions, Contact Log, Orders, and Subscriptions. The 'Contact' tab is selected, showing an 'Account Manager' dropdown and a 'Business Address' section with fields for Line 1 (910 Southwest Union Avenue), Line 2, Line 3, City, State ZIP (Palo Alto, CA, 94301), County (Santa Clara), Country (United States), and preferred addresses for mail, bill, and ship. There is also a 'Primary Email' field (Aiesha.Baldwin@demodata.aptify.com) and a 'Phone' field (1 650 750-9187 x).

The basic layout of a form includes:

- **Service Name and Record ID** — Displays the record's service and ID number.
- **Data Control Bar** — Located at the top of the form; is used for saving, closing, printing and launching functions such as wizards.
- **Link Box** — Multi-function field that can:
 1. Create a blank record for the linked service
 2. Link to an existing record (by multiple search parameters)
 3. Open the record listed in the field
 4. Enable the user to search for records in the linked service
- **Tabs** — Contain additional fields or views of data.

Record Button Bar & Shortcut Keystrokes

Aptify Records contain the same button bar regardless of the type of record accessed. The standard button bar and its functions are shown below:



Keyboard Shortcuts exist throughout Aptify.

Commonly used shortcut keystrokes:

New Record - Ctrl + N

Save Record - Ctrl + S

Save and Close - Ctrl + Shift + S

Save and Create - Ctrl + N

Print Record - Ctrl + P

Find Record - Ctrl + F

Record History - Ctrl + R

Help - F1

Refresh - F5

Creating a New Person and Companies Record

For Training purposes, students/users in the Aptify End User class will create two records: a **Company** and **Persons** record. These records will be referenced and built upon for the remainder of the class and use of this class/manual.

The **New Persons Wizard** is used to enter this information. Users can directly enter information into a record, but it is recommended they use/have wizards created for ease of entry.

Contact Information

1. In the Navigation tool bar, click the **Customers** Application.
2. On the **Customers Dashboard**, click the **New Person Wizard** button.
3. Users will enter information to create a new person record. Note that the default is a business address.
4. In the **Name** field, enter a <fictional person name>.
5. In the **Line One Address** for this person, enter any address
6. In the **Zip Code** field, enter a familiar **Zip Code**, click the **Tab** button.
 - Completing the Zip Code field auto-fills the **City**, **State**, and **County** fields
 - Zip Code will take **International Postal Codes** where available.
7. Click the **Next** button.

New Person Wizard

Record the Person's contact info below

Name (prefix, first, middle, last, suffix)

Jimmy Anderson

Business Address

Line 1 855 Ring Road

Line 2

Line 3

City, State ZIP Plympton MA 02367

County Plymouth

Country United States

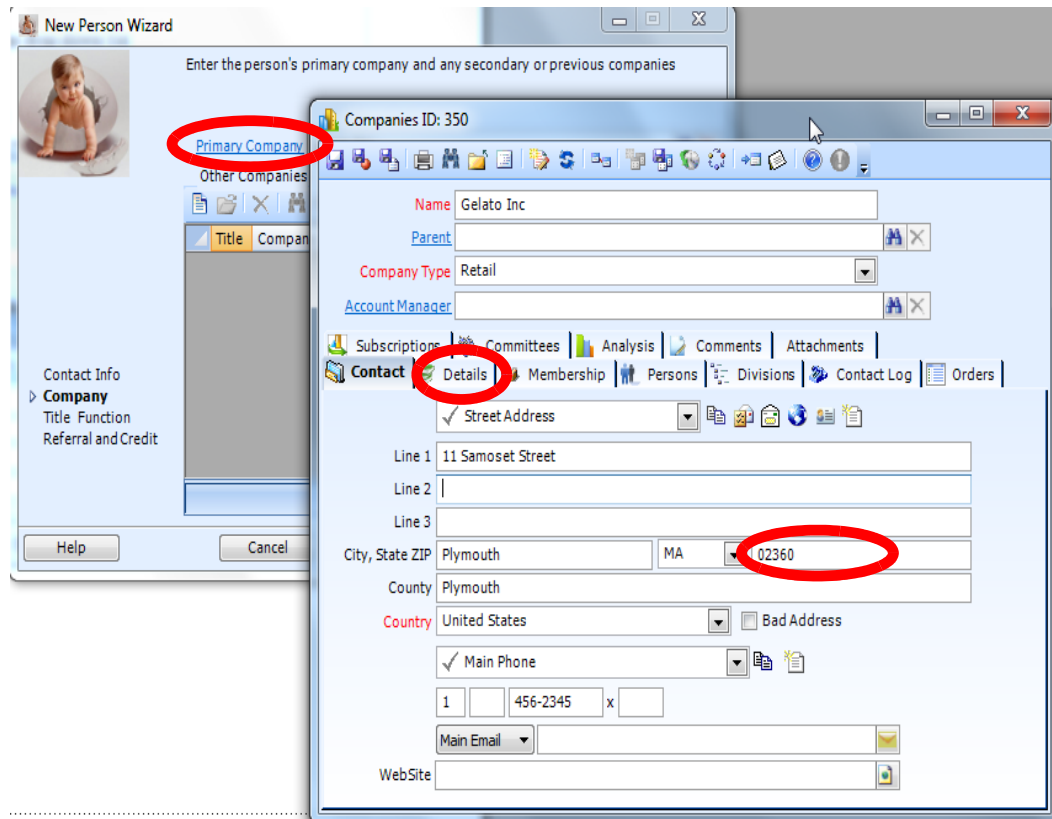
Contact Info

- Company
- Title Function
- Referral and Credit

Help Cancel Back Next Finish

Company Information

1. Click the blue **Primary Company** link.
 - Clicking a blank, linked field opens a new record for the associated service
 - Users can do this when a new, unique record is needed and not a link to an existing one.
2. In the **Name** field, enter a unique <Company Name>.
3. In the **Line 1** field, enter a unique <Line One address> as the company's main address.
4. In the **Zip Code** field, enter a unique **Zip Code**.
5. Enter a **Main Phone** number.
 - For Phone & Fax numbers,: the 1st field is the Country Code (1 for the U.S.), the 2nd field is the three-digit area code, and the 3rd field is the seven-digit number.
 - Use the Phone drop-down list to toggle between the phone and fax numbers.



Adding New Addresses

For reference with the following exercises, turn to page 2.10 to see a summary of the Address Tool Bar.

1. To add additional addresses associated with the business, click the **Add New Address** button located next to the address drop-down list.

2. In the **Enter the new name for the address** field, enter **Supply Warehouse**.
3. Click **OK**.
4. A blank **Contact** area of the **Companies** record is returned.
5. In the **Address Line 1** field, enter **4565 Leland Ave**.
6. In the **ZIP Code** field, enter **95842**, click **Tab**, city and state will auto-fill.

7. Select the **Details** tab.
8. From the **Credit Status** drop-down list, select **Approved**.
9. In the **Credit Limit** field, enter **10,000**.
10. **Save and Close** the **Companies** record (tab, top left).
 - Note that the **Company** name now appears in the **Primary Company** linked field of the wizard.

- (Steps above could have been written into the wizard as well).

Other tabs will become available once the record is saved. Users will investigate these tabs progressing through the remainder of the class/manual.

11. Click the **Next** button of the Wizard.

Title and Function Info

Now that a company record is created and a person record is associated with it, a user can specify more information about the person.

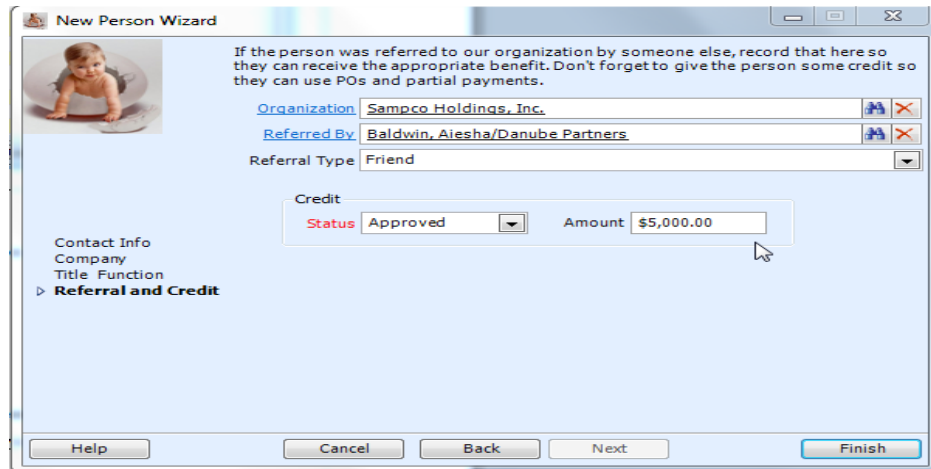
1. In the **Title** field, enter **Customer Service Representative**.
2. In the **Primary Function** field, enter **Customer Support**.
3. Scroll down, check the **Sales** checkbox below; this designates Sales as an additional function.
4. Click the **Next** button.

The screenshot shows the 'New Person Wizard' dialog box. The 'Title' field is set to 'Customer Service Representative' and the 'Primary Function' field is set to 'Customer Support'. Below these fields is a grid of job functions. The 'Sales' row is selected, indicated by a checkmark in the 'Selected' column and the date '12/4/2013' in the 'Start Date' column. The 'Next' button is highlighted.

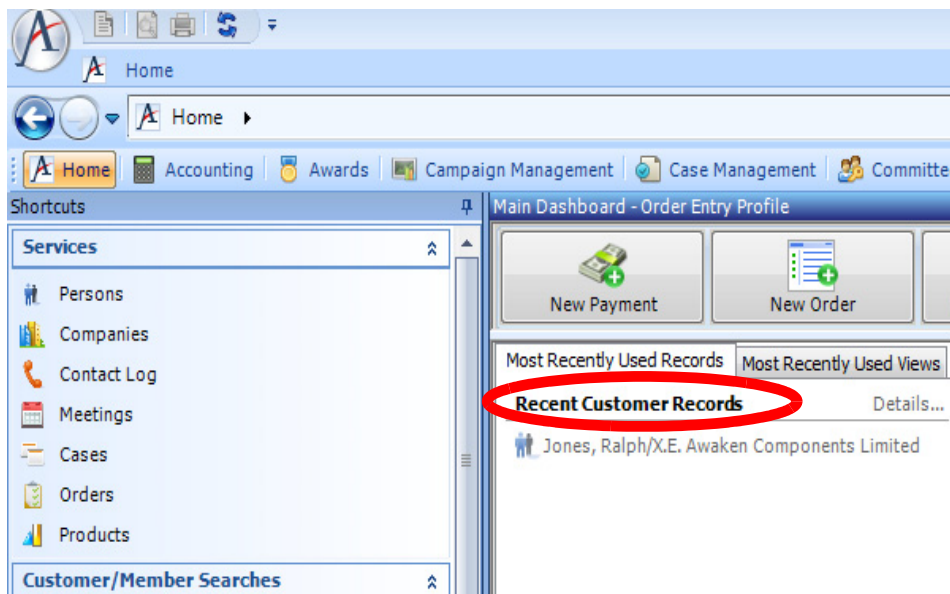
	Selected	Start Date	End Date	Comments
Advertising	<input type="checkbox"/>			
Consulting Services	<input type="checkbox"/>			
Customer Support	<input type="checkbox"/>			
Engineering	<input type="checkbox"/>			
Finance	<input type="checkbox"/>			
Information Technology	<input type="checkbox"/>			
Marketing	<input type="checkbox"/>			
Research	<input type="checkbox"/>			
Sales	<input checked="" type="checkbox"/>	12/4/2013		

5. **Sampco** should default into the **Organization** field.
6. In the **Referred By** field, enter a **1** and click **Tab** (**Aiesha Baldwin** will auto-fill).
7. From the **Referral Type** drop-down, choose **Friend**.
8. From the **Credit** field drop-down, select **Approved**.
9. In the **Amount** field, enter **5000**, click **Tab**.
10. Click the **Finish** button.

11. From the **Wizard** pop up box, click the **No** button (to not repeat process).



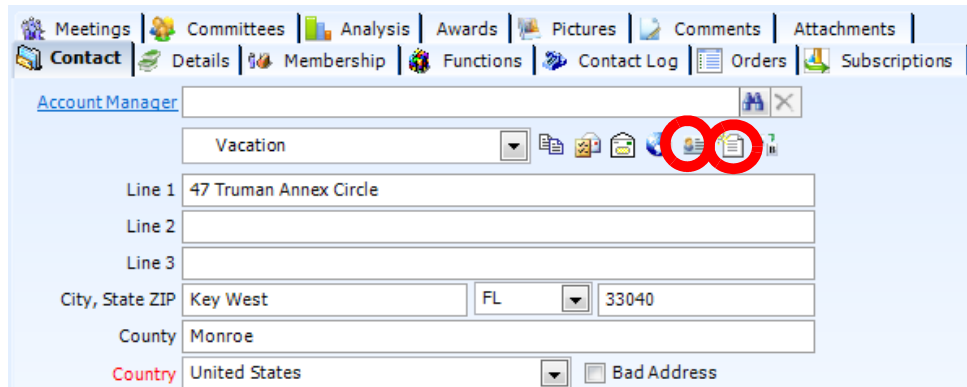
12. In the **Navigation Bar**, click **Home**
13. Above the **Recent Customer Records** column, click the **Most Recently Used Views**.
14. Click back on the **Most Recently Used Records**.
15. The new **Persons** record will be listed.
16. Click the **Persons** record to open it.
17. Note the company information associated with this person is shown, and by clicking on the address field drop-down, one can see the additional address criteria as well.



Adding New Addresses

For the Persons record, the Contact tab is the default. A users' Companies Address is automatically used as the Business Address. To add a person's home address:

1. From the address drop-down list, choose **Home Address**.
2. For the **Person**, enter a new <home address>.
3. This **Persons** record will now have two different addresses configured, the **Prof. Mail Addr.** which is the Business Address and the home address.
4. Click **Save** button (top left). Once the record is saved, a check mark will appear next to address types that have an associated record.
5. To add an additional address for example, a persons' vacation address during a certain time frame, click the **Add New Address** button.
6. In the **Enter the new name for the address** field, enter **Vacation**.
7. Click **OK**.
8. In the **Address Line 1** field, enter **47 Truman Annex Circle**.
9. In the **ZIP Code** field, enter **33040**, click **Tab**.
10. In the address tool bar, click the **Setup Default Address and Date Ranges** button.



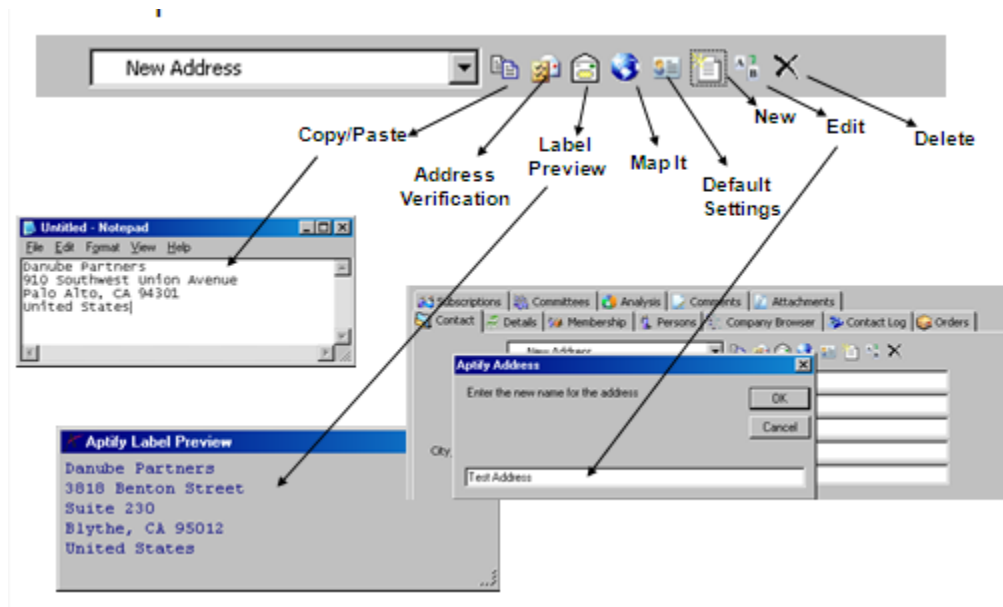
11. From the Address box, (seen below) **setting** column drop-down list, select **Date Range**.
12. Enter a **Start Date** of **12/17/20xx**. (xx is current year)
13. Enter an **End Date** of **12/28/20xx**.

Address	AddressType	Setting	Start Date	End Date
Business Address		Never		
Billing Address		Never		
Home Address		Never		
PO Box Address		Never		
Vacation		Date Range	12/17/2012	12/28/2012

14. Click **OK** and **Save and close** the record.

Address Bar

The Addresses tool bar allows users to manage address additions and deletions.



The Contact tab of a Companies or Persons form can store all the addresses for a company or person. The addresses are available when selecting a **Ship To** or **Bill To** address on an Orders form.

The Company Address record includes an **Address Type** field, which links to the Address Types service. An administrator can add or edit Address Types as necessary from the Administration - CRM application.

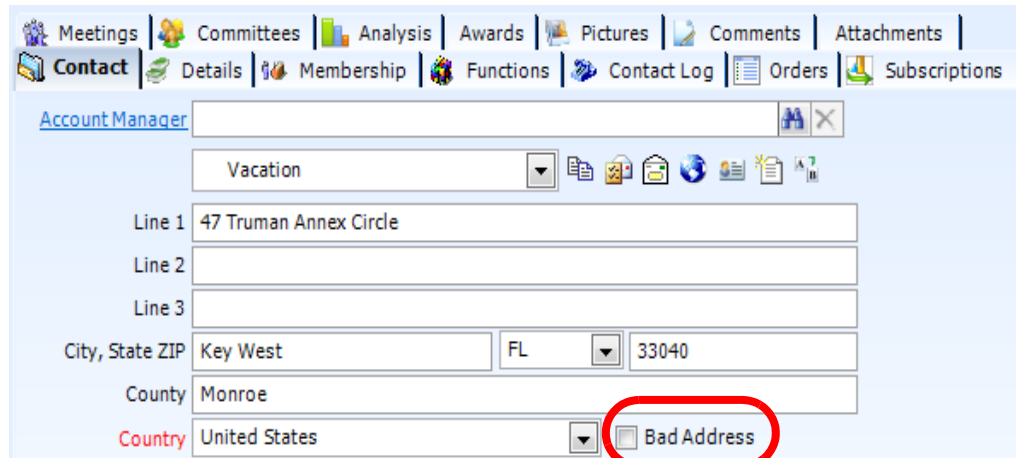
If the address is temporary, users can enter a **Start** and **End Date** to indicate a time frame for when this address is valid.

Also, users can place a check mark in the **Use As Preferred During Date Range** box to indicate that this is the address to use for the Company during the time period specified.

Bad Addresses

Users can label an Address as a **Bad Address** by utilizing the Bad Address checkbox in the Address section of a Persons record.

Users can then create Views of records with designated bad addresses and call/email those users for corrections.



The screenshot displays a software interface for managing contact records. At the top, there is a navigation bar with various icons and labels: Meetings, Committees, Analysis, Awards, Pictures, Comments, Attachments, Contact, Details, Membership, Functions, Contact Log, Orders, and Subscriptions. Below this is a search bar labeled 'Account Manager'. The main area shows a contact record with the following fields: 'Vacation' (with a dropdown arrow), 'Line 1' (47 Truman Annex Circle), 'Line 2' (empty), 'Line 3' (empty), 'City, State ZIP' (Key West, FL, 33040), 'County' (Monroe), and 'Country' (United States). A red circle highlights the 'Bad Address' checkbox, which is currently unchecked.

Organizations and Employees Records

The **Organization Management** application uses **Organizations** and **Employees** records to store information about the internal structure of both the user's organization and its employees.

The Organizations and Employees records do NOT store external customer information. This is contained in the **Customers** Application as **Companies** and **Persons** records.

First time users of Aptify often confuse Organizations with Companies and Employees with Persons. Most end users of Aptify will **NOT** need to access either Organizations or Employees; those areas will usually only be accessed by IT and Accounting for initial entry, and HR for occasional maintenance.

Employee Records will be set up initially in the database by Administrators. Admins will then use the Aptify User Administration Wizard to link the appropriate Licenses, Profile, Security, and Employee record together. This structure will then create an audit trail where the employees actions are tracked throughout their use of the system.

*For the purposes of standard End User training, each user in class will be known as **Baseline User**.*

Organization Accounting

Aptify enables users to track the General Ledger (GL) entries for **Accounting** via the Organizational structure that is set up during the user's configuration. When an Organization (i.e. the company that is buying and will be using the Aptify software) is set up, that company becomes the **parent organization of all GL entries**. This setup enables standard accounting or multi-entity accounting.

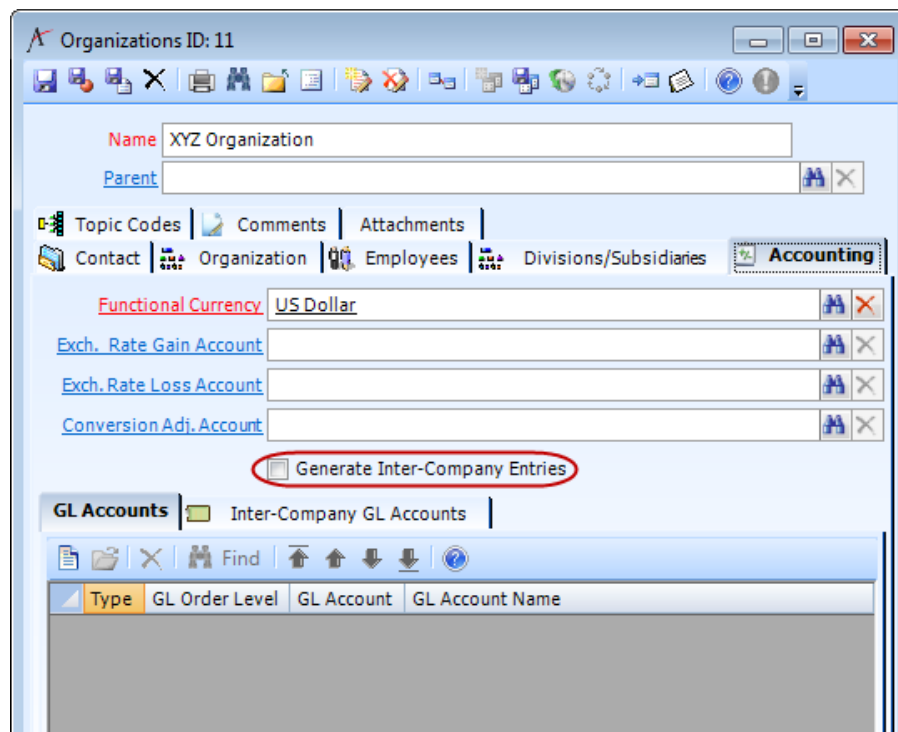
Multi-Entity Accounting

Aptify can create GL entries to segregate funds as necessary between a parent organization and its subsidiaries.

- For example, an association may run a **Foundation**, which is a separate business entity, so the organization would use multi-entity accounting to ensure that the funds are associated with the proper entity.
- A user specifies "Due To" and "Due From" GL accounts to establish debits and credits accounts between a parent organization and one or more subsidiaries. This is for accounting purposes only and does not affect orders or payments from customers.

Setting Up an Organization's Multi-Entity Accounting

1. Create the **Organization** and its subsidiaries (as needed).
2. Enable the **Generate Inter-Company Entries** option on each entity's **Accounting** tab.



- Establish **GL Accounts** between a parent organization and a subsidiary:

Two sets of accounts

- From parent organization perspective, “Parent Due to Subsidiary” and “Parent Due from Subsidiary”
- From subsidiary perspective, “Subsidiary Due to Parent” and “Subsidiary Due from Parent”

- Add these accounts to each Organization’s **Inter-Company GL Accounts** tab.
 - For example, a user would add the “Parent Due to Subsidiary” and “Parent Due from Subsidiary” to the Parent record.

GL Account	Description	Debit Amount	Credit Amount
1005	Total Cash Inflow From Payment	\$50.00	
1106	Credit A/R For Payment to Order ID:165, Line #1		\$50.00
6052	Amount Due From Parent Organization(6) To Subsidiary Organization(7)	\$50.00	
6001	Amount Due To Subsidiary Organization(7) From Parent Organization(6)		\$50.00

- Specify organization-specific A/R and Sales accounts for products linked to that parent/subsidiary.
- Create Payment types that use organization-specific Cash account.
- Aptify automatically generates GL entries between organizations as necessary.
 - In this example, a customer purchases a subsidiary product from the parent organization, so GL entries are created to specify how the payment should be accounted for between the entities.

Chapter 3

Record Management

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Reviewing Record History	3.4
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Loading a Template	3.12
Cloning Records	3.11
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Objective

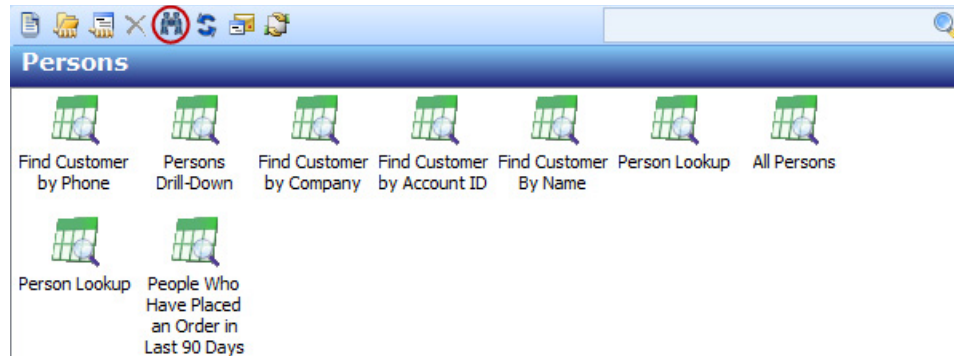
In this chapter, users will learn how to:

- Work with records
- Resolve Record Conflicts
- Duplicate records using multiple methods

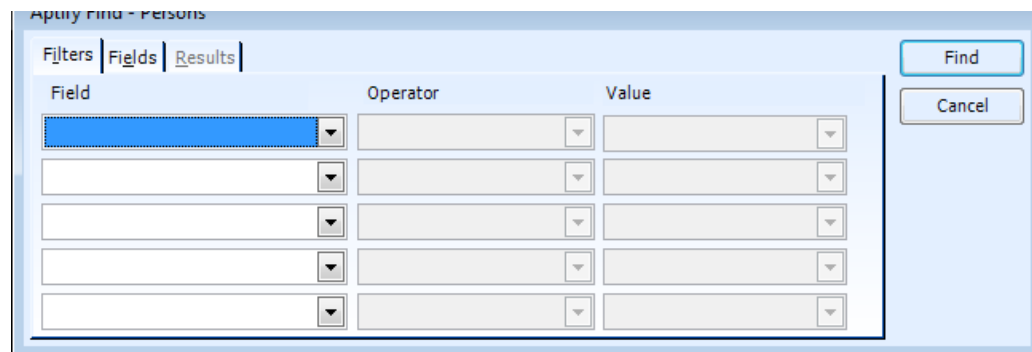
Finding Records

In this section, users will utilize the Find Items function to locate records in a service.

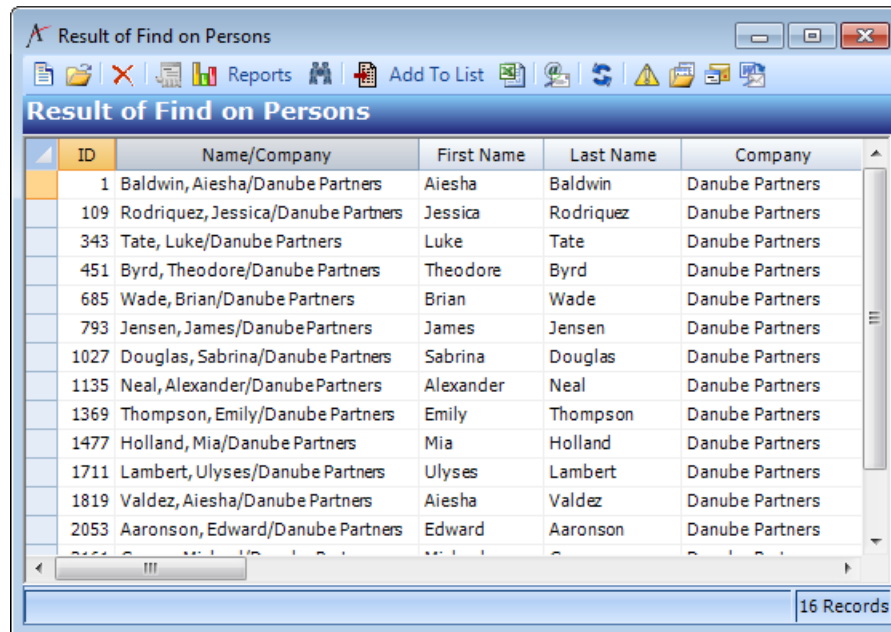
- In the top tool bar, *right click* the Persons service and select **Find Items...** from the list. The Find Items dialog box will appear.
 - The **Find Items** dialog box can also be opened by clicking the binoculars button in the Services or View toolbar. Locate the binoculars button.



- From the Find-Persons box, click on the blue field labeled **Persons search**. This will bring up a box with additional filters for selection.
- From the **Field** drop-down list, scroll down to select **Company Name**.
- From the **Operator** drop-down list, select **Contains**.
- In the **Value** field, enter **danube**.

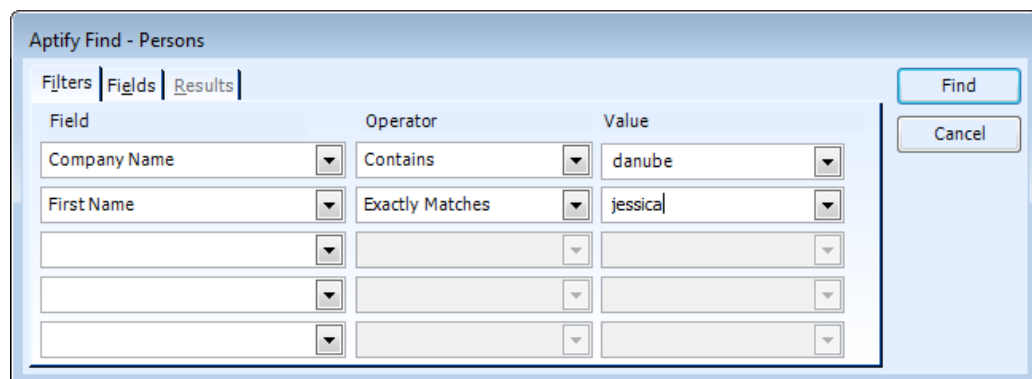


- Click **Find**.
 - A new View window appears that displays the records whose company contains the word *danube*.
 - A record from this window can be opened by double-clicking it.



ID	Name/Company	First Name	Last Name	Company
1	Baldwin, Aiesha/Danube Partners	Aiesha	Baldwin	Danube Partners
109	Rodriquez, Jessica/Danube Partners	Jessica	Rodriquez	Danube Partners
343	Tate, Luke/Danube Partners	Luke	Tate	Danube Partners
451	Byrd, Theodore/Danube Partners	Theodore	Byrd	Danube Partners
685	Wade, Brian/Danube Partners	Brian	Wade	Danube Partners
793	Jensen, James/DanubePartners	James	Jensen	Danube Partners
1027	Douglas, Sabrina/Danube Partners	Sabrina	Douglas	Danube Partners
1135	Neal, Alexander/DanubePartners	Alexander	Neal	Danube Partners
1369	Thompson, Emily/Danube Partners	Emily	Thompson	Danube Partners
1477	Holland, Mia/Danube Partners	Mia	Holland	Danube Partners
1711	Lambert, Ulyses/Danube Partners	Ulyses	Lambert	Danube Partners
1819	Valdez, Aiesha/Danube Partners	Aiesha	Valdez	Danube Partners
2053	Aaronson, Edward/Danube Partners	Edward	Aaronson	Danube Partners

7. From the results of this find, click the **Find Items** button (binoculars) to open a new Find Items window.
8. Under the column headings, on the first line, in the **Field** column, enter **Company Name**; in the **Operator** column, enter **Contains**; and in the **Value** column, enter **danube**.
9. On the second line, in the **Field** column, enter **First Name**; in the **Operator** field, enter **Exactly Matches**; in the **Value** view, enter **jessica**.
 - Search lines in the Find Items dialog are separated by AND operators.



Field	Operator	Value
Company Name	Contains	danube
First Name	Exactly Matches	jessica

10. Click **Find**.
 - Aptify displays the Persons record for Jessica Rodriquez. Aptify displays the record itself rather than a results screen since only one record fulfilled the search criteria entered.
11. Close the view.

Reviewing Record History

In this exercise, a user will use **Record History** to view previous versions of a record.

1. Open the **Persons** record, if not already opened.
2. At the bottom of the form, change the **Phone** drop-down from **Phone** to **Fax**.

3. In the **Fax** field, enter **1 212 555-5555**.
 - In the first **Fax** field (Country Code), enter **1**.
 - In the second **Fax** field (Area Code), enter **212**.
 - In the third **Fax** field (Phone Number), enter **555-5555**.
4. Click **Save**.
5. Change the **Fax** number from **555-5555** to **123-4567**.
6. Click **Save**.
7. In the record's toolbar, click the **Record History** button.



8. Observe the Record History window that displays.

Date Updated	Who Updated	Changes
4/26/2012 3:32 PM	Asmith	Fax Phone changed from 555-5555 to 123-4567
4/26/2012 3:32 PM	Asmith	Fax Record created
4/26/2012 3:31 PM	Asmith	Record created

9. **Resize** the columns of the **Record History** window as needed to display additional information.
 - Move the cursor between a column header until it becomes a left/right arrow.
 - Hold down the mouse button and drag the cursor left or right to expand the width of the columns.

10. In the top field, notice the version of the record that shows the original fax number entered (555-5555).
11. IF users had Admin privileges, the **Restore** button would be active. This would create a new version of the record that resets it to the previous version. In other words, this process reverts the Fax field to 555-5555.
12. Click **Yes** to continue.
13. Otherwise, click **Close** to close the **Record History** window.
14. **Close** persons the record.

Viewing Dependencies

In this section, users will learn how to View Dependencies- records that contain information that are dependent, or related to, another.

In the top Navigation tool bar, *right click* **Persons** service and select **Find Items**.

15. To open Persons record ID #268, enter **268**.

16. Click the **Show Dependencies** button in the record's data control bar.



17. Observe the **Persons Record Dependencies** window that displays.

- This window contains a list of all records, or **dependencies**, that reference the Persons record and require its information. The list includes multiple Orders, Payments, etc. Because dependencies must link to another record, Aptify will not allow users to delete any record that has dependencies. If a user attempts to delete a record with dependencies, the system will present an error message. For example, a company record with related persons records may not be deleted.

Entity	SubType	Field	Record ID	Has	Record Name
Scheduled Trans	Top Level	Bill To, Subscriber	1292	<input type="checkbox"/>	1292
Payments		Person	1555	<input type="checkbox"/>	1555
Payments		Person	1840	<input type="checkbox"/>	1840
Orders	Top Level	Ship To, Bill To, Order	4519	<input type="checkbox"/>	4519
Orders	Top Level	Ship To, Bill To, Order	3851	<input type="checkbox"/>	3851
Opportunities		Person	200	<input type="checkbox"/>	Exhibitor - Ito-Yokado Co., Ltd.
Opportunities		Person	535	<input type="checkbox"/>	Advertising - Ito-Yokado Co., Ltd.
Opportunities		Person	870	<input type="checkbox"/>	Furniture - Ito-Yokado Co., Ltd.
Opportunities		Person	1205	<input type="checkbox"/>	General - Ito-Yokado Co., Ltd.

18. **Close** the Record Dependencies window.

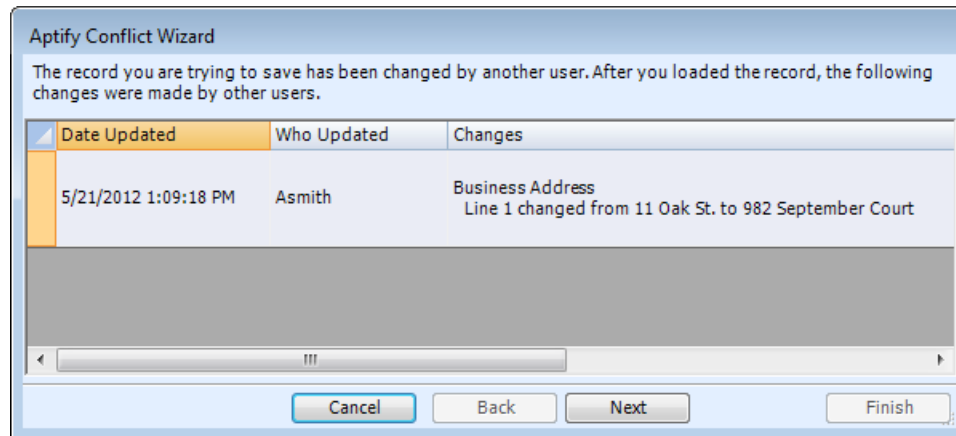
19. Close the **Persons** record.

20. If prompted, click **No** to confirm closing the record without saving changes.

Using the Conflict Wizard

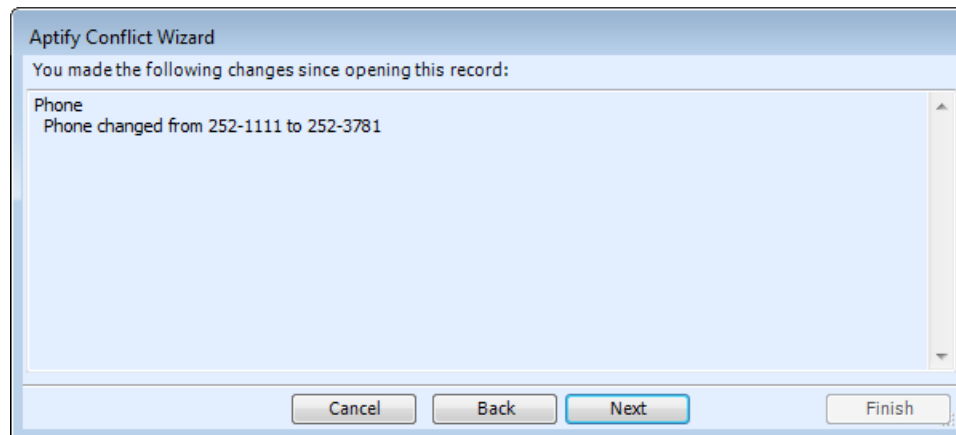
Within Aptify, two users may work with the same record simultaneously. However, it is possible that the changes made by the users to the record may conflict with each other. Therefore, the Conflict Wizard will launch automatically whenever one user attempts to save a record that has been modified by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

The **first screen** of the Conflict Wizard lists the changes that user2 made to the record since it was opened by user1.

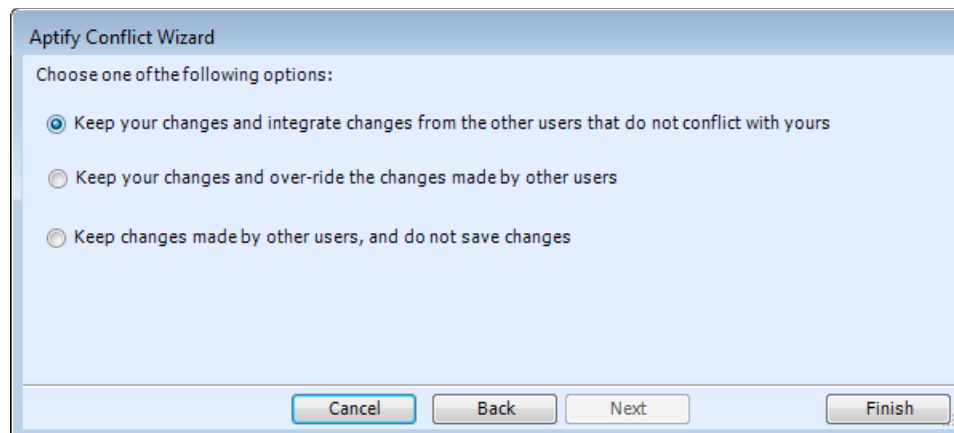


On this screen, user1 can click **Next** to continue or **Cancel** to close the wizard and return to the form without saving the changes by user2.

The **second screen** of the Conflict Wizard lists the changes that user1 has made to the record. On this screen user1 can click **Next** to continue, **Back** to return to the previous screen, or **Cancel** to close the wizard and return to the form without saving changes by user1.



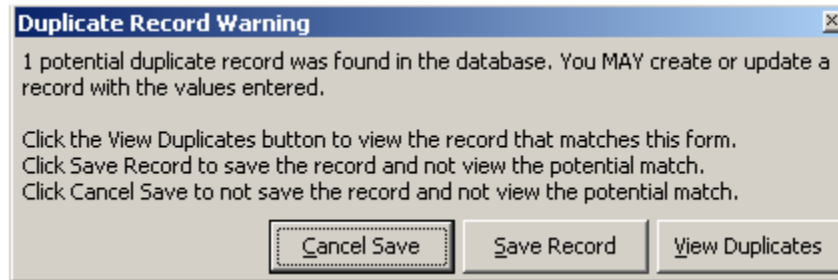
The **third screen** of the wizard gives user1 three options for resolving the conflict:



1. Save changes by user1 and integrate the changes from the other users that do not conflict with the changes user1 has made.
2. Save user1's changes and override all of the changes made by other users.
3. Do not save user1's changes and keep the changes made by the other users. If this option is selected, user1's changes are still displayed in the form but they are not saved to the record. (User1 will need to close the record without saving.)

Click **Finish** after one of these three options is selected. **Back** can also be clicked to return to the previous screen, or **Cancel** to close the wizard without making any changes.

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.

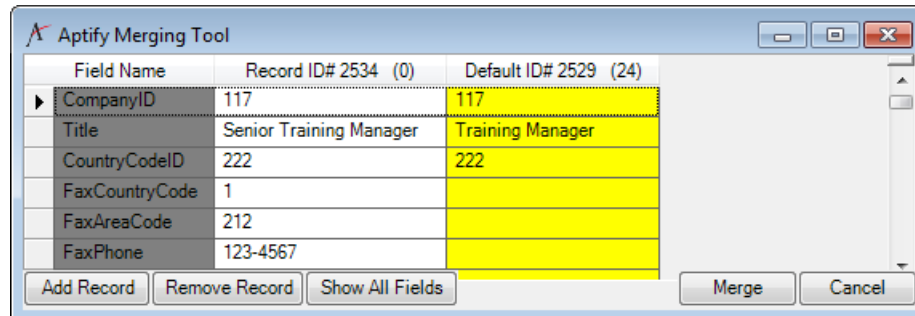
When a message is received about a possible duplicate, choose one of the following options:

1. **Yes:** Click Yes 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.
2. **No:** Click No to save the new record without seeing the potential match.
3. **Cancel:** Click Cancel to return to the record without saving.

If duplicate records exist, a user can **merge** them into single record

- A user can specify which record and which fields should survive the merging process
- Any dependent records are automatically linked to the surviving record
- 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

Merging Records



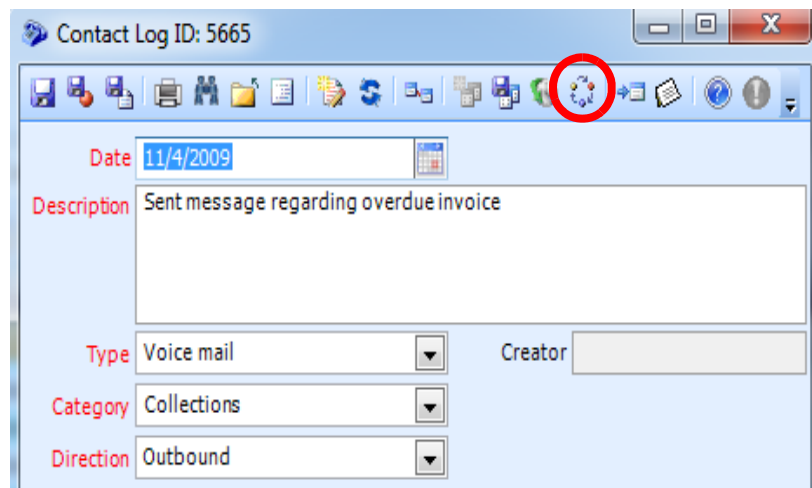
1. Follow these steps to merge records:
 1. Create a view that contains all of the records that a user wants to merge.
 2. Select the records to merge (hold down the **CTRL** key to select multiple records).
 3. *Right click* within the view and from the pop-up list, select **Merge Records**.
 4. If there are additional records to include in this merge, click **Add Record** and use the Find Items utility to locate them (one at a time).
 5. To remove a record from merge, highlight the record's column & click **Remove Record**.
 6. 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.
 7. Determine which record to keep. The other records will merge with the record selected. To select the record (also referred to as the default record), highlight the record's column, *right click* and choose **Set Record as Default** from the pop-up list.
 8. Determine which field values desired. To select a field value in a record other than the default record, place the cursor in that field and *right click*. Then, select **Set Field as Default** from the pop-up list. The field will appear with a yellow highlight (within the Merge Tool; items that will persist in the merge record are highlighted in yellow).
 9. When ready to merge the records, click **Merge**.
 10. Click **OK** to begin the Merge process.
 11. Click **OK** to commit the Merge results to the system.

Cloning Records

- Makes a copy of an existing record
- Useful if a user needs to create multiple records that share many of the same values
- Reduces data input time and can increase accuracy

To clone a record:

1. Open an existing desired record to clone.
2. From the **Data Control Bar**, click the **Clone** button.
3. The new, clone of the original record will open. Make the desired edits and **Save**.



Save As Pending

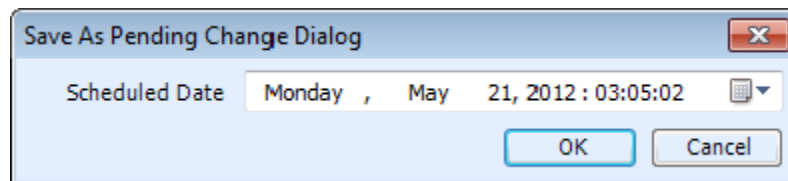


Sometimes it is beneficial to be able to make certain changes to records that take effect at a future date. For example, a company is moving locations and will have a new address as of the beginning of next year. The Save As Pending option saves the record as pending, allowing a user to modify records prior to a specific date, and then applies those changes automatically on the scheduled date. When a pending change exists, it automatically enables the Alerts button prompting the user that there are pending changes on this record. A user can also edit and delete pending changes as necessary.

Saving Changes as Pending

Follow these steps to save changes to a record that should be applied on a specific date in the future:

1. Open the **Persons** record created previously. (Double click Home, go to Recently used records column, find persons record created)
2. Change the **Street Address**.
3. In the toolbar, select the **Save As Pending** button.
4. In the **Scheduled Date** drop-down, select a month from today.



- The default value is the current date and time.
5. Click the **OK** button to close the dialog.
 - The form repopulates with the currently saved data (the pending changes are removed since they are not applicable yet).
 - The Alerts icon turns red to notify all users that pending changes exist for record.
 6. After the pending change's specified date and time passes, the Aptify Scheduled Tasks system automatically updates the record with the appropriate changes. Once the pending changes have been saved to the record, the Alerts icon no longer appears in red.

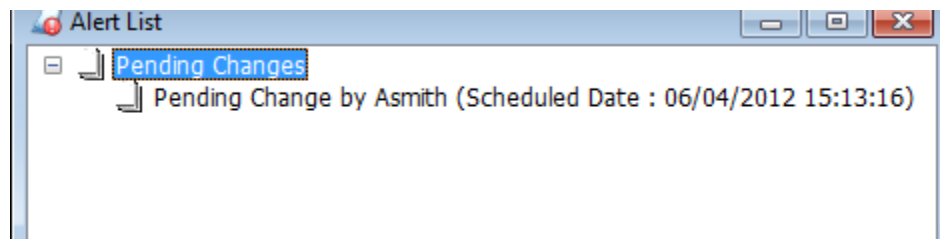
Modifying Pending Changes

Follow these steps to modify changes that have been saved as pending:

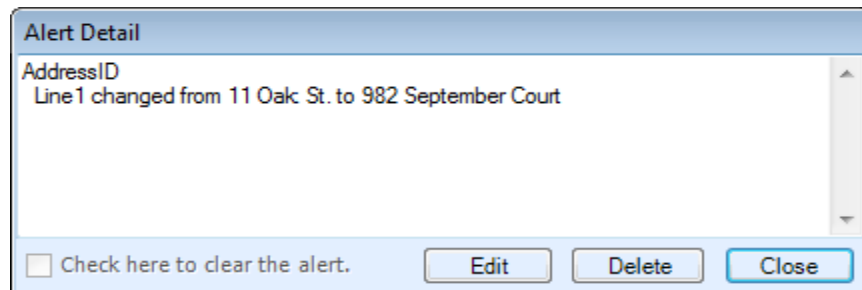
1. Select the **Alerts** button.
 - When a pending change exists for a record, the Alerts button becomes active, notifying the user that there are pending changes on this record.



2. Expand the **Pending Changes** hierarchy by selecting the plus sign (+).



3. Double-click the pending change to be modified to open the associated **Alert Detail** dialog. This enables the user to see information about pending changes applied to the record.



4. Click the **Edit** button.
 - The record is refreshed with the pending changes specified in the Alert Detail Dialog.
5. Change the Address to **1000 Northwest Union Avenue** and select **Save As Pending**.
 - Even if a user decides not to make any modifications to the existing pending change, they still need to select the **Save As Pending** option to reset the Scheduled Date.

Note: the modified changes can be viewed by selecting the corresponding change from the Alert List. Follow these steps:

- Select the **Alerts** button.
- Expand the **Pending Changes** hierarchy by selecting the plus sign (+).
- Double-click the appropriate pending change to view the modified changes.

Deleting Pending Changes

Follow these steps to delete a pending change:

1. Select the **Alerts** button.
 - When a pending change exists for a record, the Alerts button becomes active prompting the user that there are pending changes on this record.
2. Expand the **Pending Changes** hierarchy by selecting the plus sign (+).
3. Double-click the appropriate pending change to view the modified changes.
4. Click the **Delete** button.

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Objective

In this chapter, users will learn how to:

- Create and Edit Views
- Sort and Arrange Views
- Understand different types of Views
- Compose Bulk Messages
- Manage Views

Understanding Views

Views are the most critical function for finding and communicating data in Aptify. Views are similar to reports, in that they display a subset of data, but unlike reports, views allow users to open records and work with the data.

They are the function most interacted with in the database as well. Views are spread throughout all of Aptify and every Service in Aptify will have multiple Views pulling from it.

Any view that is valuable to a user should be embedded as part of their dashboard and/or saved as a shortcut. If a view is used daily for a user to see large portions of data, it belongs in a dashboard. If used interactively to find data daily/weekly, it should be made a shortcut.

Views are organized displays of data that represent subsets of the records contained in a Service. A user defines filters which define the data displayed in the view. Once created, views can be saved within each user's profile and used again by selecting the view.

Four Major View Types

List Views

- Most common used view in Aptify - approximately 90% of all Views are List Views
- Contains a list of records, formatted using columns and rows

Chart Views

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

Calendar Views

- Good for Meetings, Committees, Education, etc. that utilize date based functions.
- Organizes records using time data, and displays them on a calendar

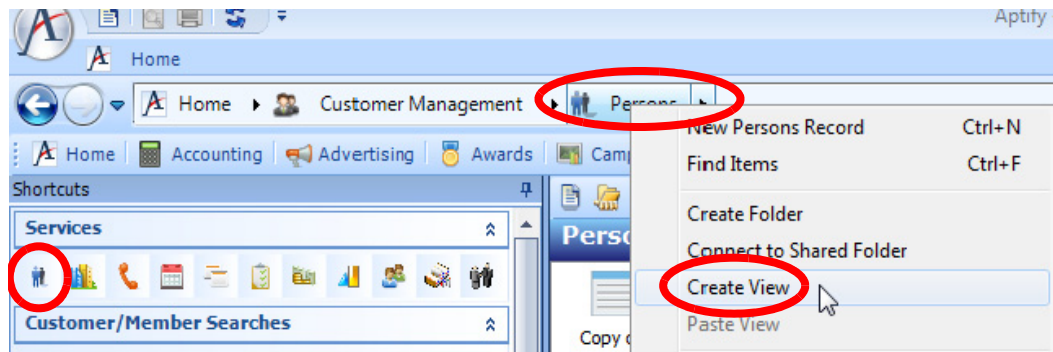
Pivot Table Views

- Power view option that provides interactive reports to summarize large amounts of data
- Table information can be expanded or collapsed depending on the level of detail needed

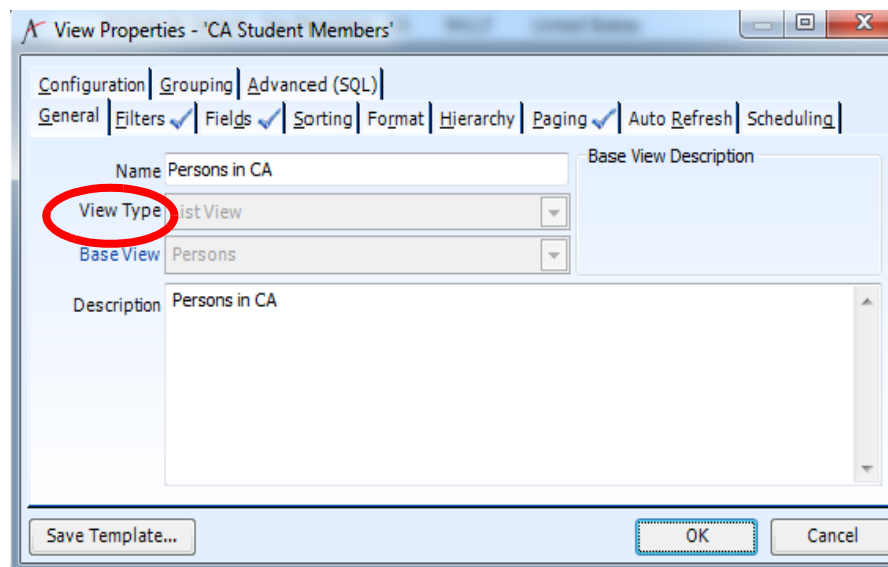
Creating List Views

Follow these steps to create a List view:

1. Select the **Persons Service** shortcut.
2. In the **Navigation Bar**, *right click* **Persons** and select **Create View** from the list.



3. Give the View a name or title. In the **Name** field, enter **Persons in CA**. (Give explicit description for others who might also use it).
 - This exercise will create a View of Persons in CA
 - Later in this chapter the exercise will add additional Filters and edit the name.
4. Leave **List View** selected from the View Type drop-down list.



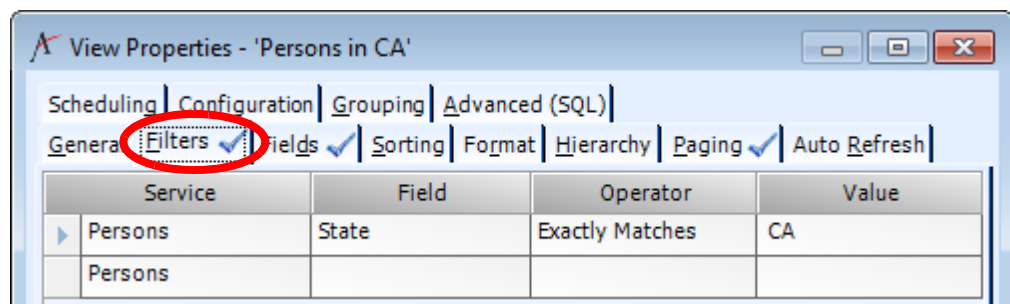
Using View Filters

Aptify lets users locate specific information within a database by filtering data to present in views. Filtered views will only show a view of data based on specific criteria. For example, a user could create a filtered view that displays only the following records:

Customers who **work** in the state of California.

Create a Basic Filtered View for Persons

1. On the **Persons in CA** view properties in progress, select the **Filters** tab to create data record filter criteria.
 - **Persons** appears in the **Service** column by default. The Service column drop-down list shows a set of services that are linked to the selected service.
2. From the **Field** column drop-down list, select **State**:
 - First, click in the **Field** column. A drop-down arrow appears.
 - Start typing **State**. After entering a few letters, the field will fill in automatically.
3. From the **Operator** column drop-down list, select **Exactly Matches**.
4. In the **Value** column field, enter **CA**.
 - The State field uses the two-letter abbreviation.



5. Click **OK** to show the view created.

NOTE: Even though the Field designation above reads “State”, it actually is pulling the **Work State** of the Person. Work State, because it is the default value on the Persons form, is only indicated by the text, “State”.

A Persons record’s **Home State** would be designated by the text, “Home State”.

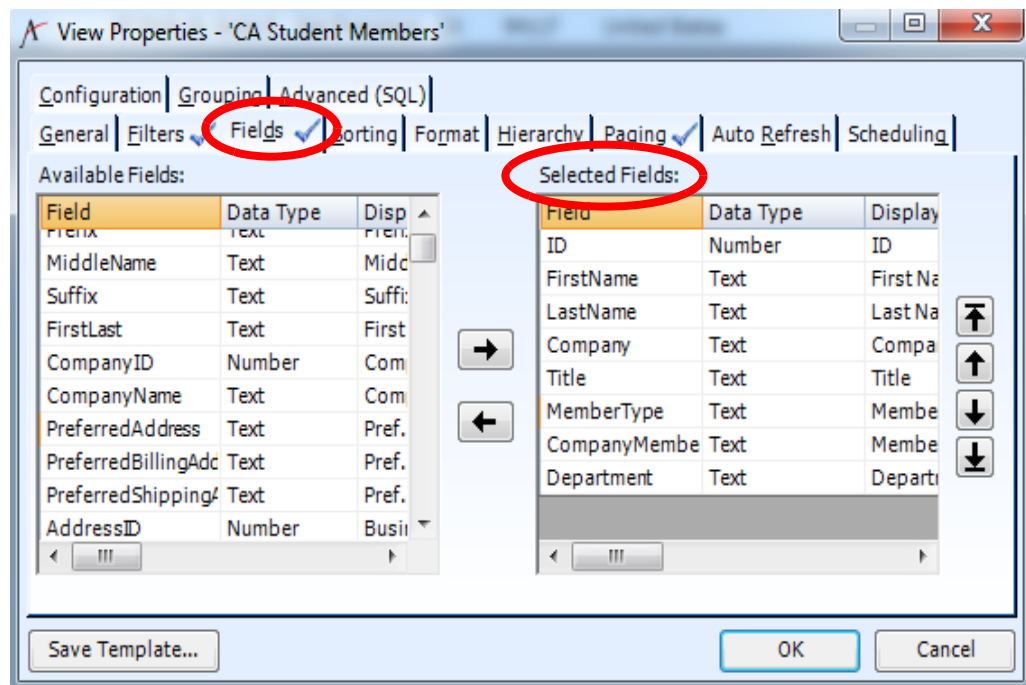
Add to Shortcuts Bar:

To add this view to the user’s shortcut bar, click on the “My Shortcuts” bar to activate it, then from the top Navigation bar, *right click* the Persons in CA and select **Add to Shortcuts Bar**

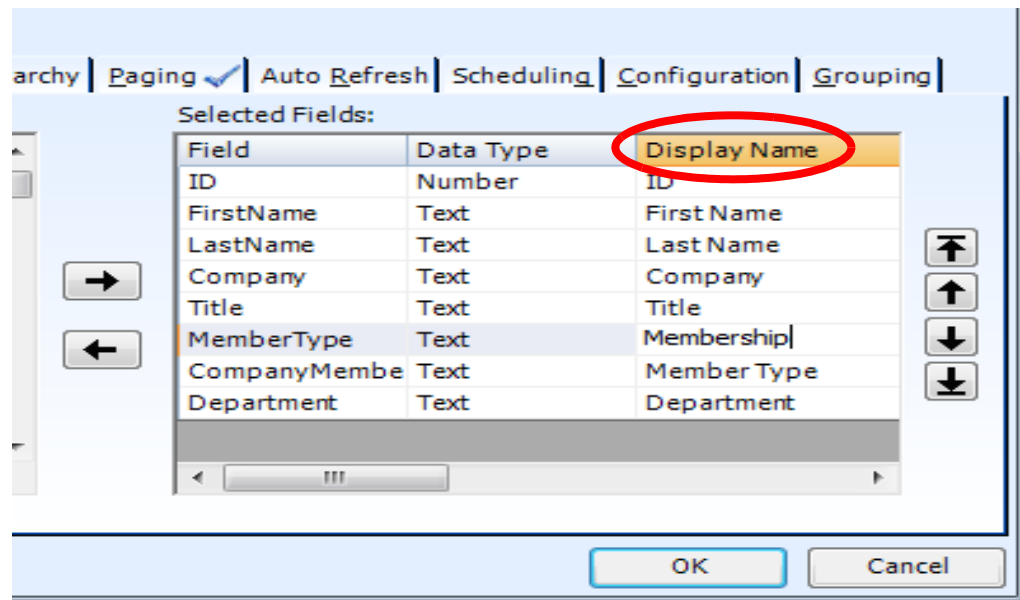
Editing View Fields

This exercise illustrates how to select which fields display in a view, how to rename a view's field headings, and how to change the order in which fields appear. By default, views display a list of selected fields. Users can customize which fields a view displays using the **Fields** tab in the view's properties screen.

1. From a selected view, on the View button bar, click the **Properties** button, then select the **Fields** tab.
2. In the Selected Fields column, select from Address Line 1 to Primary Function.
 - Hold down the **CTRL** key to select multiple, separated fields in the list.
 - Hold down the **Shift** key to select multiple, contiguous fields in the list.
3. Double-Click on the selected fields, or use the left facing arrow, to move them to the **Available** Fields column.
4. Scroll through the Available Fields column values to the **Department** field.
 - **Tip:** clicking the 'Field' column heading in the Available Fields area will sort the displayed fields in alphabetical order.



5. Double-click **Department** to move it to the Selected Fields column.
6. Use the **Up** arrow on the right side to move **Department** below the **Company** field.
 - When the View is displayed, the selected fields will display left to right as the Column Values.

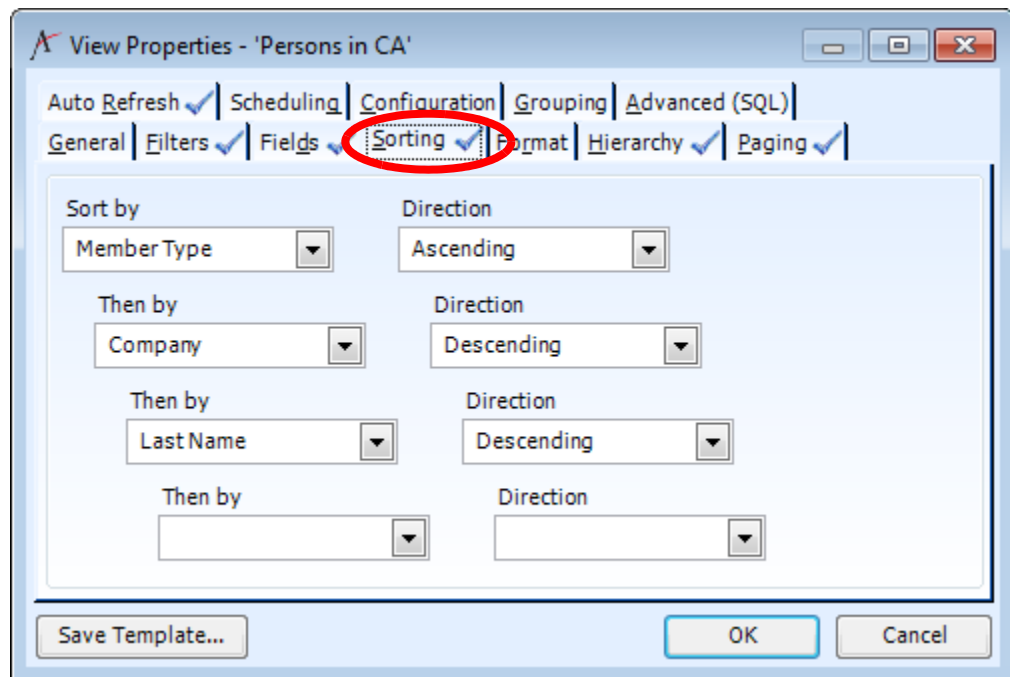


7. In the Selected Fields column, use the scroll bar to view the **Display Name** column, then click in the row for **MemberType** to edit its Display Name.
8. Enter **Membership** in the field provided.
 - **Click OK.** Once the View is displayed (OK clicked), Membership will display as the column header, not MemberType.

Sorting Data in Views

Within a view's properties' screen, users can specify multiple sorting criteria.

1. From the Persons in CA view, on the View button bar, click the **Properties** button. Select the **Sorting** tab.
2. From the **Sort By** field's drop-down list, select **Member Type**.
 - Leave the Direction set to Ascending.
3. In the first **Then By** field, select **Company**. (Select the *CompanyName* or *Company* field from the drop-down list rather than the CompanyID field. Set **Direction** to **Descending** for this field.
4. In the second **Then By** field, select **LastName**. Set **Direction** to **Descending** for this field.

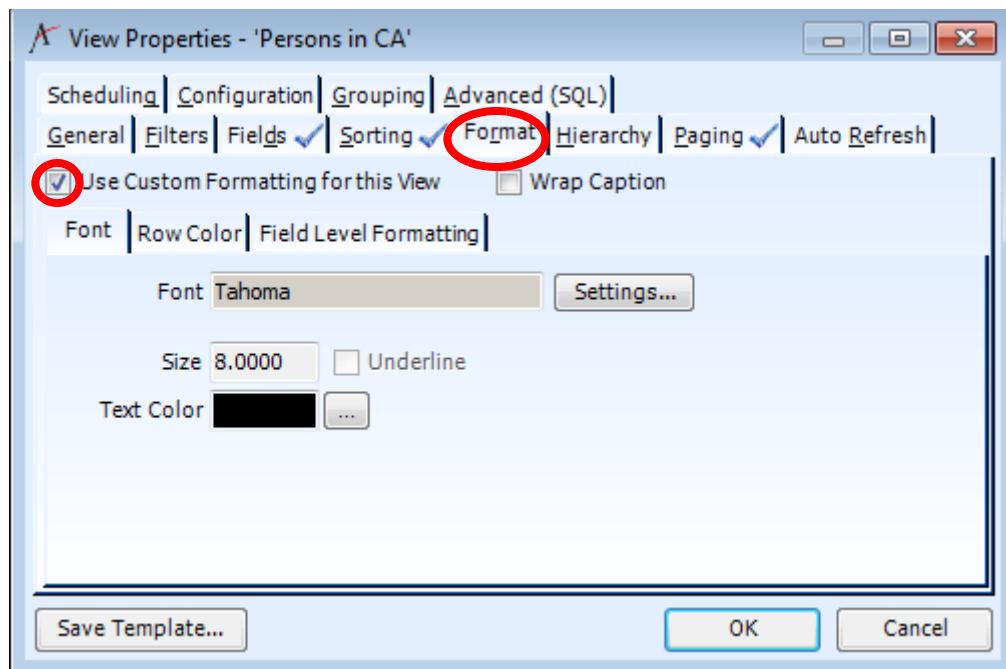


5. Click **OK** to save the changes to see the modified view on the screen.
6. Scroll through records displayed in view and confirm that records are sorted as specified.
 - Corporate Members are listed before Individual Members, who are listed before Non-Members. Within each Member Type, companies are listed in reverse alphabetical order. For each company, persons are listed in reverse alphabetical order. Note that setting the sort order within a view by selecting a column and clicking the Sort Ascending or Sort Descending button will override the sorting order specified in the View Properties screen.
 - **WARNING** - If a user chooses to change a Views sort by clicking on a column in the display of the View (after clicking OK), that sort will **OVERRIDE** the previous sort designated under the Sort tab.

View Formatting

Aptify enables users to change many aspects of how Views results look. Users can change the text's size, font type, color, bolding, underlining, and italicizing.

1. From the view, on the View button bar, click the **Properties** button.
2. Select the **Format** tab.
3. Place a check mark in the **Use Custom Formatting for this View** box to display the formatting options.



4. Select the **Row Color** sub-tab.
5. Click the ellipsis (...) button next to **Alternate Color**.
6. Select a **desired color** as the alternate color.
7. When displayed, the View will have alternating colors which will enable the rows to be distinguished more easily.

Hierarchical Viewing

Aptify has a powerful feature called hierarchical viewing. This feature enables users to drill into subsets of data directly through the view results set. Users can select what subsets of data they want to drill into through the Hierarchy tab. To set up this feature:

- On the View button bar, click the **Properties** button, then select the **Hierarchy** tab.
 - Aptify provides numerous hierarchial choices and multiple subsets of data which can be selected.
- Select the first of the four **Orders** listed by scrolling down the list and selecting the checkbox next to it.
- Click **OK**.
 - The view results return; in the far left-hand column, when the cursor is over a record a + sign displays; this indicates the record can be selected and its associated orders displayed

Persons in CA (Page 1 of 2)	
Member Type	Name/Company
+ Individual Member	Garner, Dalton/Akebono Cryogenics Incorporated
Individual Member	King, Timothy/Apple Computer, Inc.
Individual Member	Mann, Madison/Apple Computer, Inc.

- Move the cursor along the far left-hand column to see + signs appear for each record. Move to a record and click the + **sign** in the left-hand column.
- The **Orders** results frame will display.

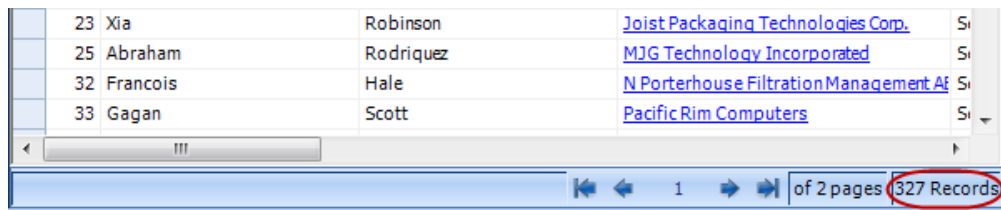
Persons in CA (Page 1 of 2)			
Member Type	Name/Company		
+ Individual Member	Garner, Dalton/Akebono Cryogenics Incorporated		
Individual Member	King, Timothy/Apple Computer, Inc.		
Contact Log (ContactLog)			
ID	Date	Description	Creator
3215	1/2/2010	Spoke with contact regarding future needs, call	Phone
3216	12/2/2009	Left Voice Mail	Voice ma
3217	11/2/2009	Left Voice Mail	Voice ma

- Minimize the Orders data by clicking the **minus (-) signs**.
- Observe the other changes made to the View thus far: **Filters, Fields, Sorting, and Formatting**.

View Paging

The View Paging settings determine how many records appear on one screen at a time. Follow the steps below to configure View Paging.

1. Reopen the **Persons in CA** View.
 - On the View button bar, click the **Properties** button.
 - OR From the display list, *right click* on the View and select **Views Properties** (near bottom of list).
2. Click **OK** and look in the bottom right-hand corner of the screen. A number should display for the amount of records in the view page.



The screenshot shows a table with four rows of data. The status bar at the bottom right indicates 'of 2 pages (327 Records)', with the number '327' circled in red.

23	Xia	Robinson	Joist Packaging Technologies Corp.	Si
25	Abraham	Rodriquez	MJG Technology Incorporated	Si
32	Francois	Hale	N Porterhouse Filtration Management Af	Si
33	Gagan	Scott	Pacific Rim Computers	Si

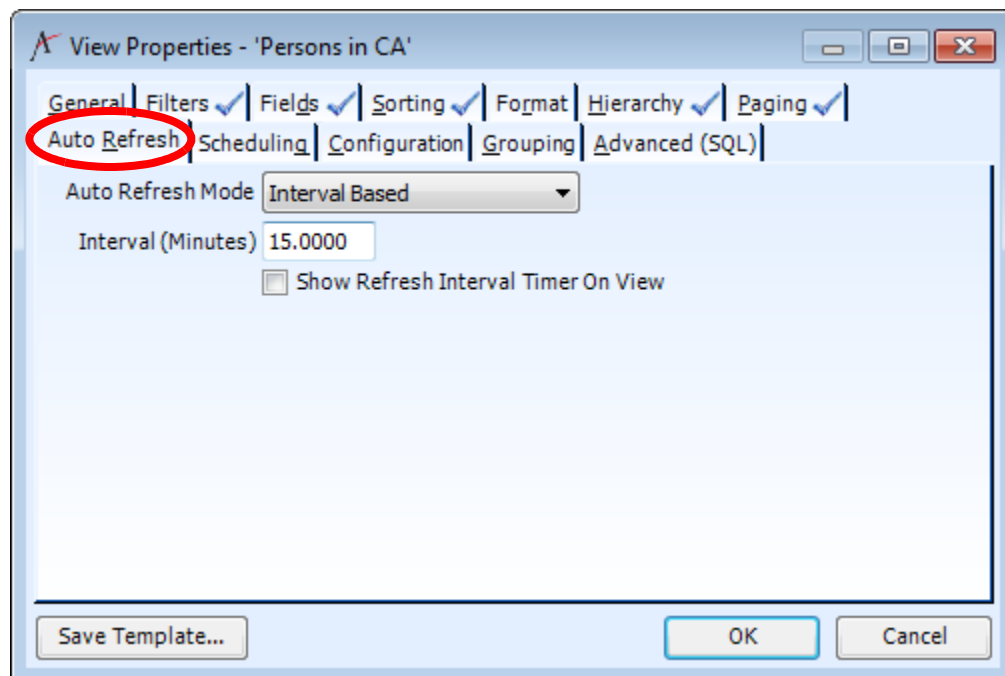
3. Multiple pages of results should display. Users can control how many pages the view will return by setting up paging preferences.
4. Open the **View Properties**.
5. Select the **Paging** tab.
6. Notice the default is to allow for paging with 250 results per page. Change the number of results per page to 50.
7. Click **OK**. The user should now have more pages of results.

As a rule, most users should NOT change the number of results displayed per page. This function can be tied by administrators to a Record Set Query as well whereby users will be limited in the actual number of records they can return overall. For instance, if a user with a pre-set, Record Set Query amount of 500 tries to return a View of 1000+ records, they will only receive the first 500 of the records in two, 250 results filled pages.

Auto Refresh

Users can set how frequently they want the system to refresh the view's results. This is helpful when they need to keep a view open for long time periods and there is a lot of activity that will change the results over time. This function should be combined with opening the view in a separate window (*right click* in the Navigation Bar on the View).

1. Re-open **Persons in CA**. In the View button bar, click the **Properties** button, then select the **Auto Refresh** tab.
2. Change the Auto Refresh Mode drop-down from **None** to **Interval Based**.
 - When the mode is changed to Interval Based, an Interval (Minutes) field appears that can be changed to specify how often the view is refreshed.



3. Change the interval to 1 minute and check the **Show Refresh Interval Timer on View** box. This will enable a viewable countdown until the next auto refresh in the lower left-hand section of the view page.
4. Click the **OK** button to return to the view results and note the timer at bottom left.

Individual Member	Holland, Baka/Dole Food Company, Inc.
Individual Member	Burgess, Naina/EK Techno Business Inc.
Individual Member	Cross, Tadako/EK Techno Business Inc.
Individual Member	Lowe, James/EK Techno Business Inc.

1 of 2 p

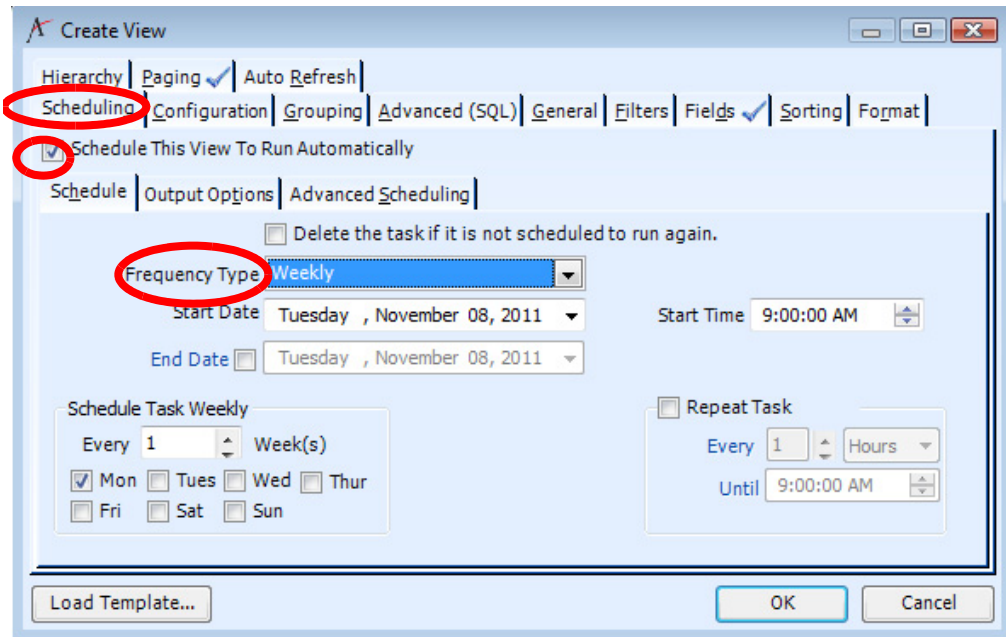
Next Auto Refresh - 14:34

Scheduling Views

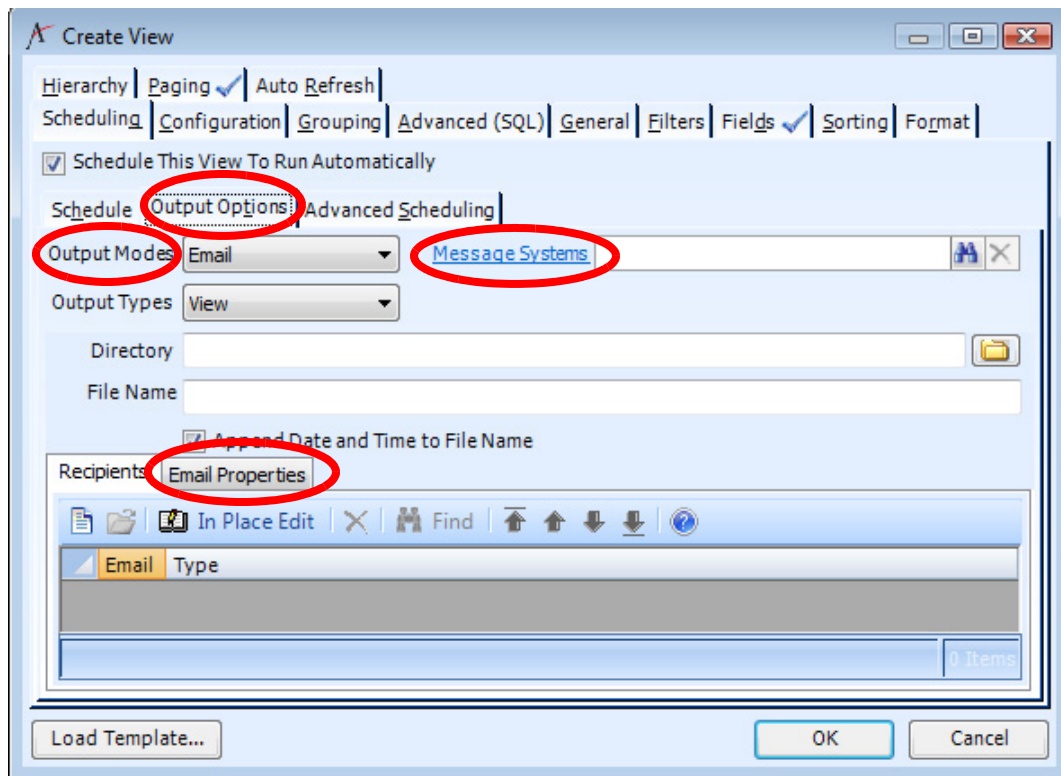
Users can schedule a view to automatically output its information once or on a recurring basis. When the view runs, Aptify can save the view as an Excel file or a Crystal Report and then print it on a network printer, or send it to multiple recipients as an email attachment.

For example, a sales manager can create a view that displays all orders taken that day. Then, they can schedule the view to run nightly and send the results to the sales department in an email message.

1. On the View button bar, click the **Properties** button.
2. Select the **Scheduling** tab.
3. In the **Schedule This View To Run Automatically** box, place a check mark.
4. For the Frequency Type, enter **Weekly**.



5. Select the **Output Options** tab.



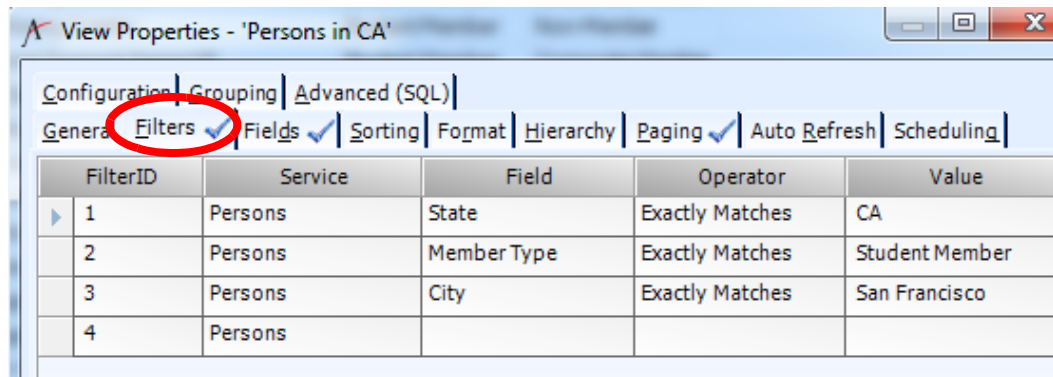
6. In the **Output Modes** drop-down, leave **Email** selected.
7. From the **Message Systems** field, enter **Outlook Email**
8. Observe the **Output Types** (click the arrow to see options), but keep **View** as option.
9. Resize the View Properties window to full screen, and from that screen's toolbar, underneath the **Recipients** button, click the **New Record** button.
10. Observe the **Available** fields, then click **Cancel**.
11. Select the **Email Properties** sub-tab; observe the available fields.
12. Select the **Advanced Scheduling** tab.
13. Users can set the **View** to run on a separate **Application Server** to reduce the processing load on the main server.
14. Click **Cancel**.

Advanced View Filters

Create a View with Two Filters

1. From the top Navigation Bar, *right click* **Persons in CA**, select **Properties** (or Properties button, if open).
2. Edit the **Name** and **Description** fields to read: **San Francisco Student Members**
 - If **Persons in CA** was previously made a **Shortcut**, the user must delete that shortcut since the parameters have changed, and add the new **San Francisco Student Members** as a shortcut.
3. Click the **Filters** button.
4. Keep **Persons** as the **Service** and the rest of the first row of the **Filters** dialog.
5. For the second row, keep **Persons** as the **Service**, from the **Field** drop-down list, select **Member Type**.
 - Quickly type “**Mem**” to jump to the Member Type field
 - Or click the **Field** column header to sort alphabetically, scroll to Member Type

NOTE: The first Member Type that displays is the numeric value, referring to the member type record’s ID. For this exercise, scroll down to the text value. This enables the filter to use the actual name of the member type, “Student”. Aptify recommends using the ID whenever possible to reduce search time.
6. From the **Operator** drop-down list, select **Exactly Matches**.
7. From the **Value** drop-down, select **Student Member**.
8. Third row: **Persons** is the **Service**, for **Field**, select **City**
9. From the **Operator** drop-down, select **Exactly Matches**
10. From the **Value** drop-down, select **San Francisco**.

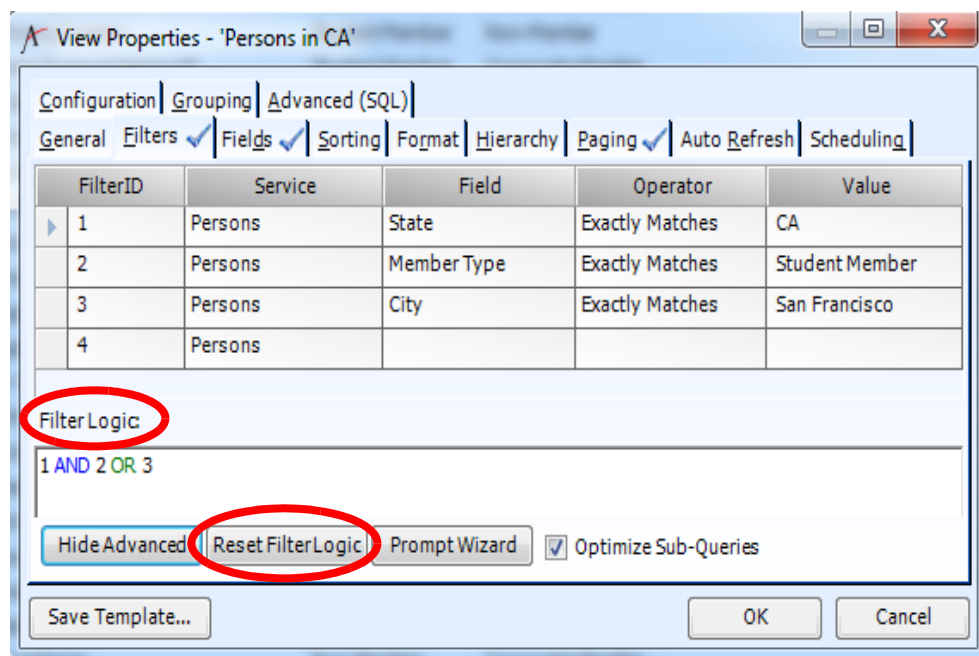


11. Click **OK** to return to display the View. Note the fields listing student members.

Editing Filter Logic

Users can also create Views that use an **OR** operator so the view can display records where, for example, State is CA *or* Last Name begins with D.

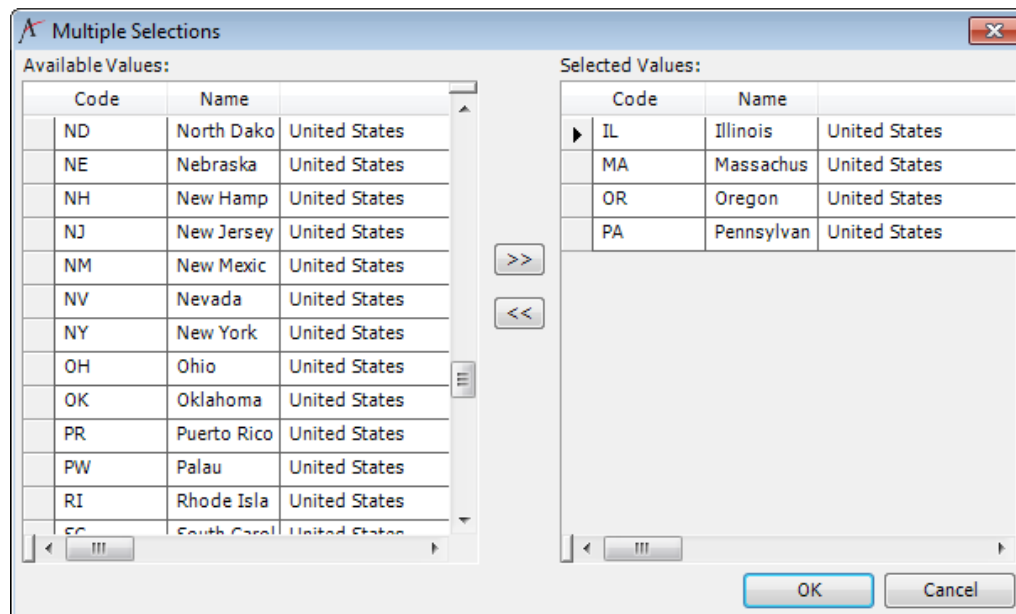
1. Either from the view, select the **Properties** tab, **OR** from the top Navigation Bar, *right click* the **San Francisco Student Members** view and select **View Properties**.
2. Select the **Filters** tab.
3. Click the **Show Advanced** button.
 - The Filter Logic box reads: **1 AND 2 AND 3**.
4. Change the second **AND** to **OR** so the Filter Logic reads: **1 AND 2 OR 3**.



5. Click **OK** to display the view.
6. Enter the number of records that appear in the view: ____ (see bottom right).
7. From the **San Francisco Student Members** view, select **Properties**.
8. Select the **Filters** tab to return to the View's Filters screen.
9. Click the **Show Advanced** button.
10. Click the **Reset Filter Logic** button.
 - The Reset Filter Logic button returns the logic to its default settings.
 - The Filter Logic changes to **1 AND 2 AND 3** (since AND is the default operator).
11. Click **Cancel** to return to the Aptify desktop.
12. Close the view.

Using the In-List Operator

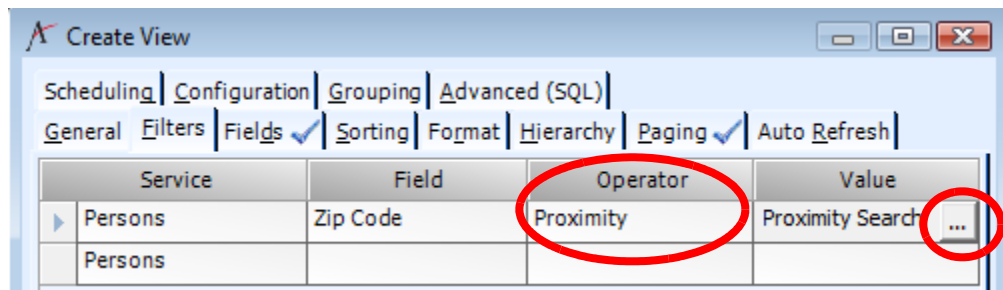
1. From the Navigation bar, *right click* the **Persons** service and select **Create View**.
2. In the **Name** field, enter **In List**.
3. Click **Filters**.
4. From the **Field** Column drop-down list, select **State**.
5. From the **Operator** drop-down list, select **In List**.
6. To the **Value** field, enter Illinois, Massachusetts, Oregon, and Pennsylvania using one of the following methods:
 - Manually enter the list of states; separate each state with a comma:
IL, MA, OR, PA
 - For fields that have pre-defined values, a user can click the **ellipsis (...)** button and select the items to include from the list of possible values.



7. Click **OK** to return the view display.
8. From the “In List” view, click **Properties**. Click **Filters**.
9. From the **Service** drop-down list, select **Persons** in the second row of the Filters dialog.
10. From the **Field** drop-down list, select **ID**.
11. From the **Operator** drop-down list, select **>** (*greater than*).
12. In the **Value** field, enter **100**.
13. Click **OK** to generate the View on the Aptify desktop.
14. The view now displays the Persons records whose State is IL, MA, OR, or PA *and* whose record ID is greater than 100.

Using the Proximity Operator

1. From the top Navigation Bar, *right click* the **Persons** service and select **Create View**.
2. In the **Name** field, enter **Proximity of within 50 mi of 20006**.
3. Click **Filters**.
4. Keep **Persons** as the **Service**.
5. From the **Field** drop-down list, select **Zip Code** (text).
6. From the **Operator** drop-down list, select **Proximity**.
7. Move the cursor over the **Value** field, and click the **down arrow** that appears. It becomes an **ellipsis**. (...) Click the **ellipsis**.



8. The **Proximity Search Wizard** displays.
9. Click **Next** at the introduction screen.
10. In the **Postal Code** field, enter **20006**.
11. Click **Next**.
12. Keep the **Closer or Exact Distance** radio button selected.
13. In the **Distance From Postal Code** field, Enter **50**.
14. Click **Next**.
15. Click **Finish**.
16. Click **OK** and view the results.

NOTE: There is an example of a **Proximity Prompt** view built into the Baseline Users shortcuts. If a user clicks on this view (located under Customer/Member Searches shortcut Group), they will be able to enter the desired zip code into the prompt. However, this prompt is based on SQL written directly in the SQL tab of that prompted View and can only be edited by an advanced user. **Therefore the settings are static for that prompted view at 50 miles from the center of the zip.**

New Postal Codes CAN be added for international use.

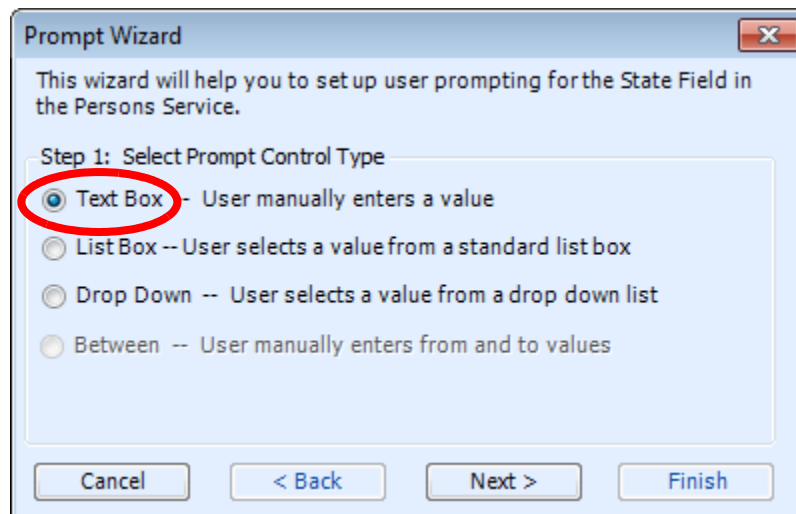
Creating Prompted Views

The most valuable type of everyday use View a user can create is a Multi-prompt view. Multi prompted views enable users to look up a record by multiple level's of criteria from one interface. In the exercises that follow, users will first create a single prompt finding Persons from a particular Company to understand basic prompt construction. Then users will create a complicated multi-prompt view for finding Persons record(s) based on multiple possibilities.

Users logged in with a profile of Aptify Baseline User have available to them multiple prompted views already created under the pre-existing shortcuts on the left-hand side of the screen. Many have multiple prompts attached to them. Most are created using “OR” statements in the filter logic so that the user may choose from only one selection. Users can easily integrate “OR” statements and even more complicated combinations of “ANDs”, “ORs”, or other SQL/boolean search characteristics.

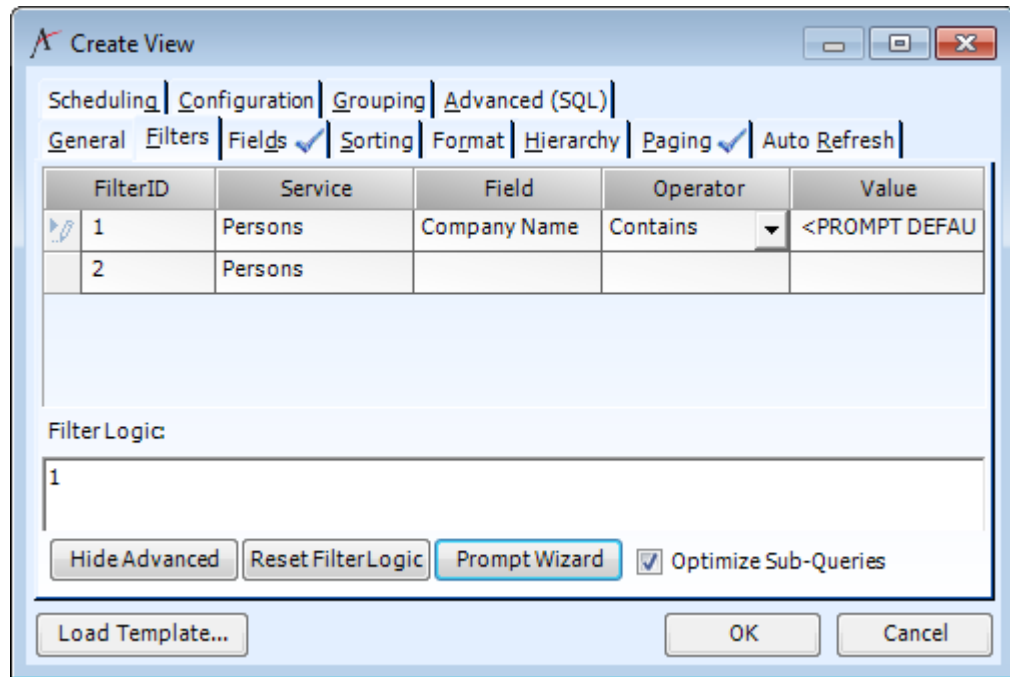
Creating A Prompted View—Text Box

1. From the top Navigation Bar, *right click* the **Persons** service and select **Create View**.
2. In the **Name** field, enter **Prompt for Company Name**.
3. Click **Filters**.
4. From the **Field** drop-down list, select **Company**.
5. From the **Operator** drop-down list, select **Begins With**.
6. Click the **Show Advanced** button.
7. Click the **Prompt Wizard** button.
8. Leave **Text Box** selected and click **Next**.

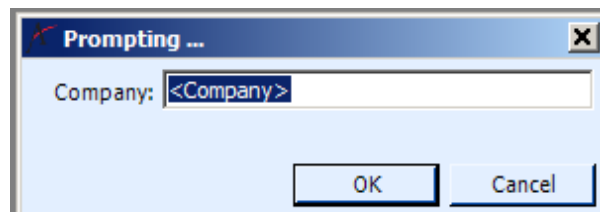


9. Enter **Company:** as the Prompt Value
10. Enter **<Company>** as the Default Value

11. Click **Finish**.



12. Click **OK** to return to the Aptify desktop. See prompt box.
13. In the **Prompt** box, enter **Danube** over the Default Value of <Company>.
14. Click **OK**.



15. Observe the displayed records in the view created as a result.
16. Refresh the view to bring up the Prompt box again.
- A view can be refreshed in four ways:
 - Click **F5**.
 - Click the **Refresh** button on the View Toolbar.
 - Right click within the view and select **Refresh** from the pop-up list.
 - Select a different view and then reselect the **Prompt for Company** view.
17. Enter **Otto** in the Prompt box and click **OK**.
18. Observe the displayed records.

Creating A Multi-Prompted View

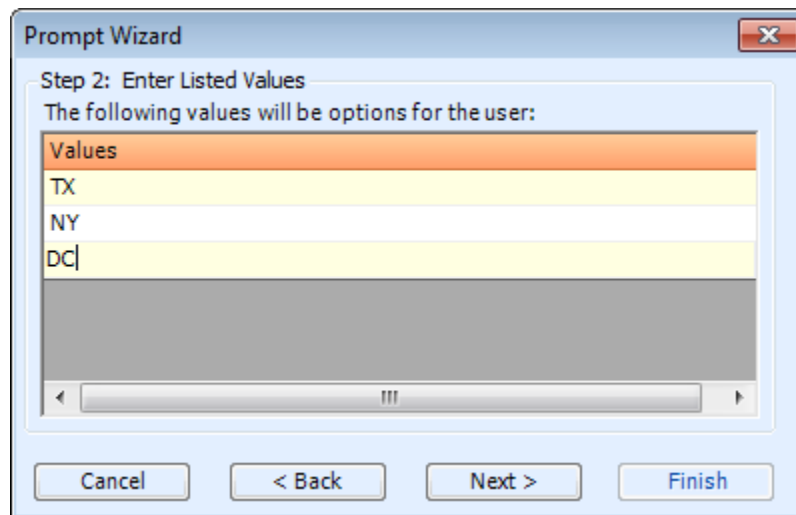
1. Reopen the **Prompt for Company Name** view just created.
2. Click the **Name** field and delete the current Name.
3. Enter **Persons Search** in the **Name** field as the new Name.
4. Click **Filters**.
5. Select the second, blank filter line Field (first, existent line will be for CompanyName).
6. From the **Field** drop-down list, select **Name/Company**.
7. From the **Operator** drop-down list, select **Begins With**.
8. Leave the **Value** field Blank.
9. Click the **Show Advanced** button.
10. Click the **Prompt Wizard** button.
11. Leave **Text Box** selected and click **Next**.
12. Enter **First Name, Last Name** as the Prompt Value
13. Enter **<First, Last>** as the Default Value, then click **Finish**.
14. Click in the third, blank filter line Field.
15. From the **Field** drop-down list, select **ID**.
16. From the **Operator** drop-down list, select **"="**.
17. Leave the **Value** field Blank.
18. Click the **Show Advanced** button.
19. Click the **Prompt Wizard** button.
20. Leave **Text Box** selected and click **Next**.
21. Enter **ID:** as the Prompt Value
22. Enter **0** as the Default Value, then click **Finish**.
23. In the Filter Logic area, change each **AND** to an **OR**.
24. Click **OK**.
25. Attempt different values in each prompt to bring results.

NOTES:

- For text based prompts, always use **Begins With** as the Operator - This will ensure a more expedited search. Using **Contains** will search through an entire table and is NOT recommended.
- Always use default value for a prompt of the field name contained in Less Than and Greater Than symbols for Text based fields. 0 in Numeric based fields. This will ensure those values are skipped and the filled out value is searched for.

Creating A Prompted View: Drop-down List

1. Click on **Companies Service**, then from the top Navigation Bar, *right click* the **Companies** service and select **Create View**.
2. In the **Name** field, enter **List of States**.
3. Click **Filters**.
4. From the **Field** drop-down list, select **State**.
5. From the **Operator** drop-down list, select **Exactly Matches**.
6. Click the **Show Advanced** button. Click the **Prompt Wizard** button.
7. Select **drop-down** and click **Next**.
8. Enter the values for the drop-down list in the fields provided.
 - Click in the white field, Enter **TX**, **NY**, and **DC**, each, one per line.



9. Click **Next** to continue.
10. Enter **TX** as the default value.
11. Click **Finish**.
12. Click **OK**. Click **OK** when the Prompt box appears.
13. Observe the displayed records
14. Click the **Refresh View** icon.
15. When prompted, select **NY** from the drop-down list, click **OK**, view the records list.
16. Click on **Persons Service**, note the view names to the right, click on “List of states” and see the prompt.

The procedure for creating a List Box prompted view is identical to the procedure for creating the drop-down prompted view.

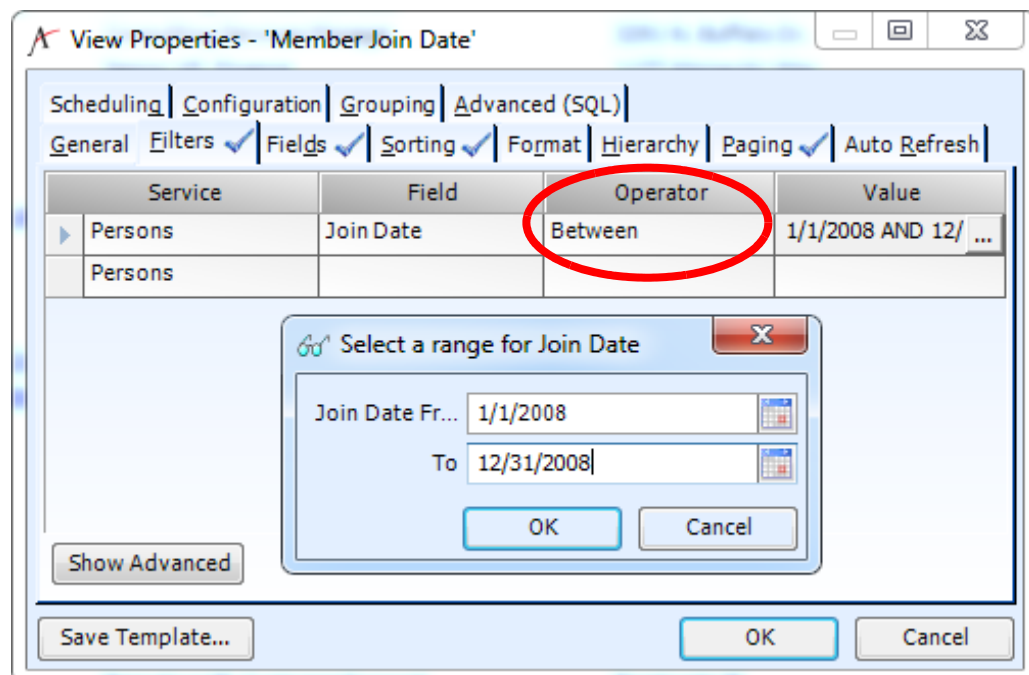
Using the Between Operator

In Aptify, users can utilize the **Between** Operator to display results that exist between two dates or numbers. Between Operators can also be used in a Prompted deployment. This can be extremely helpful in creating views where date or numeric ranges for the results are variable.

Using the Between Operator on a set basis

Follow these steps to use the Between operator

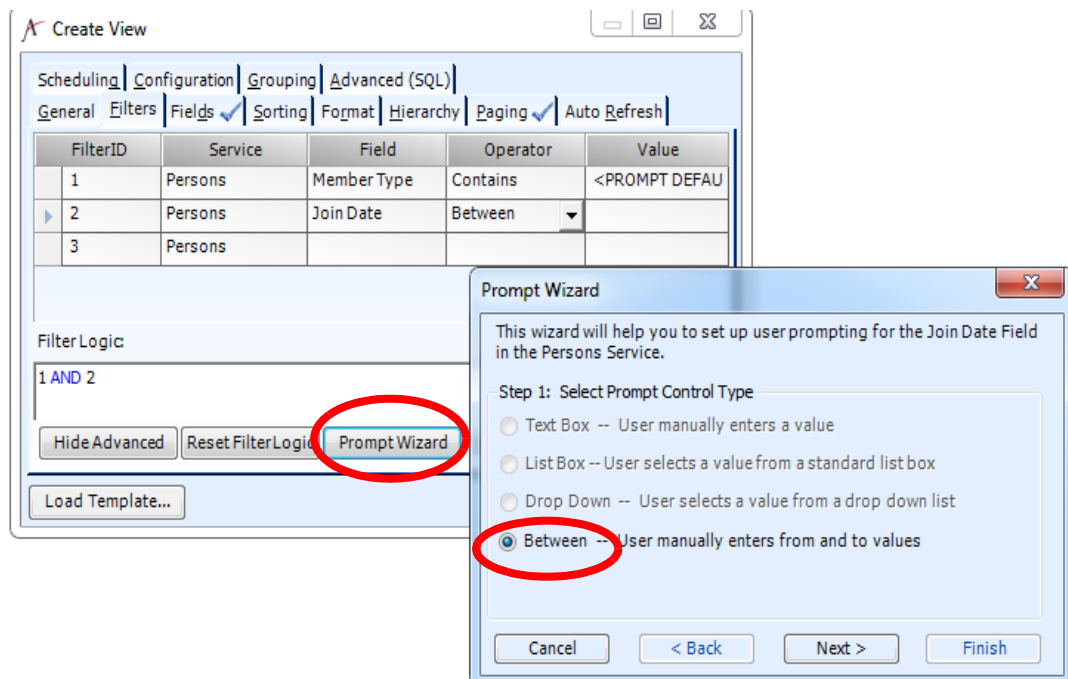
1. From the top Navigation Bar, *right click* the **Persons** service and select **Create View**.
2. In the **Name** field, enter **Member Join Date**.
3. Select the **Filters** Tab.
4. In the **Field** column, enter **Join Date**.
5. In the **Operator** field, select **Between**.
6. In the **Value** field, click on the **ellipsis (...)**.
7. In the **Join Date From** field, enter **1/1/2008**.
8. In the **To** date field, enter **12/31/2008**.
9. Click **OK** to close the **Date Range** box.
10. Click **OK** to run the view.
11. Observe the results of the View showing members who joined during the date range.



Using the Between Operator with a Prompted View

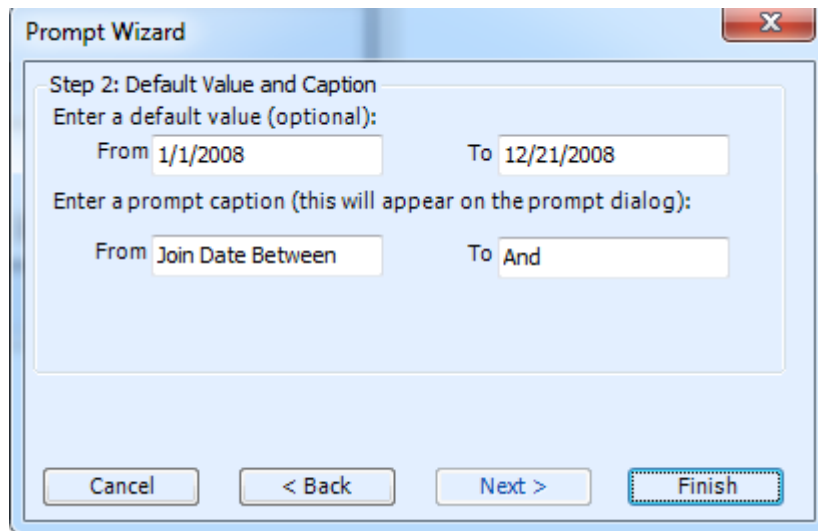
Follow these steps to use the Between operator with a Prompted View:

1. From the top Navigation Bar, *right click* the **Persons** service and select **Create View**.
2. In the **Name** field, enter **Member Join Date Prompt**.
3. Select the **Filters** Tab.
4. In the **Field** column, select **Member Type** (make sure it is member type text).
5. In the **Operator** column, select **Contains**.
6. For the **Value**, create a Prompt text box as learned in previous exercises (**Show Advanced Button**),
7. On the second **Filter** line, in the **Field** column, enter **Join Date**.
8. As the **Operator**, select **Between**.
9. Leave the **Value** field blank.
10. Click the **Prompt Wizard**.
11. The **Between** Operator should default as checked.
12. Click **Next**.



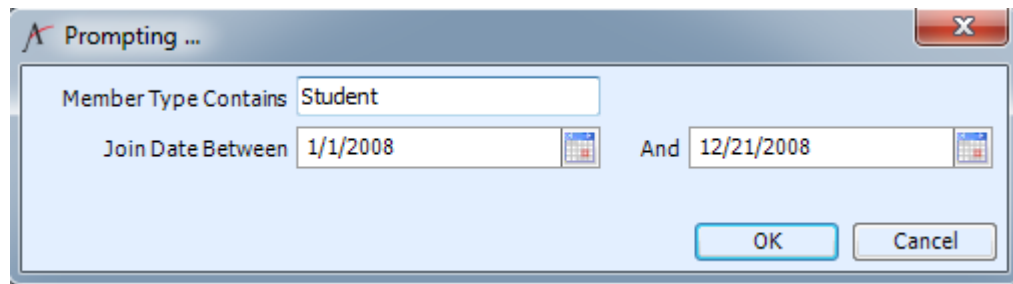
13. In the Join Date **From** field, enter **1/1/2008**.

14. In the **To** date field, enter **12/31/2008**.



The screenshot shows the 'Prompt Wizard' dialog box, Step 2: Default Value and Caption. The dialog has a title bar with a close button (X). The main area contains two sections: 'Enter a default value (optional):' and 'Enter a prompt caption (this will appear on the prompt dialog):'. In the first section, the 'From' field contains '1/1/2008' and the 'To' field contains '12/21/2008'. In the second section, the 'From' field contains 'Join Date Between' and the 'To' field contains 'And'. At the bottom, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

15. Click the **Finish** button to close the **Prompt Wizard** box.
16. Click the **OK** button to run the view.
17. Enter **Student** in the **Member Type Contains** field.
18. Leave the **Date** fields as the default **2008** dates. These can be edited in the future.



The screenshot shows the 'Prompting ...' dialog box. It has a title bar with a close button (X). The main area contains three fields: 'Member Type Contains' with the value 'Student', 'Join Date Between' with the value '1/1/2008', and 'And' with the value '12/21/2008'. There are small calendar icons next to the date fields. At the bottom, there are two buttons: 'OK' and 'Cancel'.

19. Click the **OK** button.
20. Observe the results of the View.

Utilizing Base Views

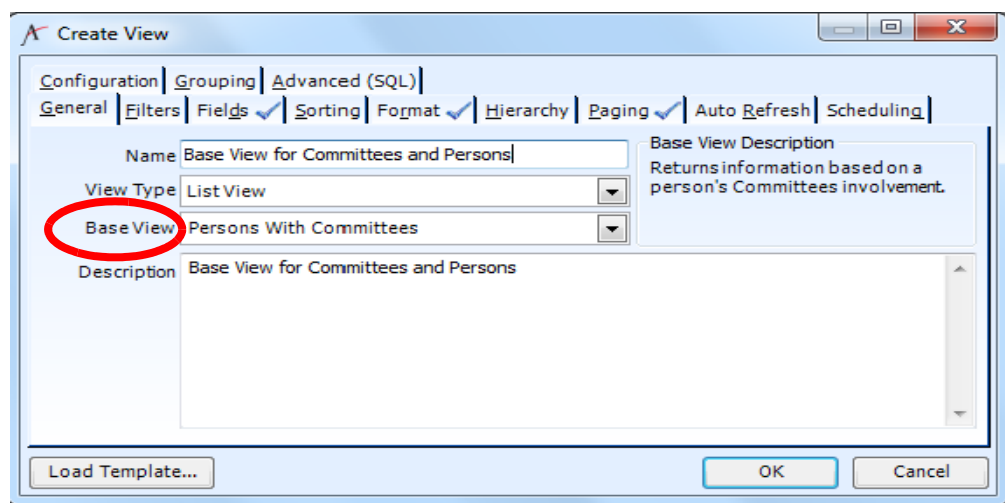
Base Views are pre-created views that combine fields from multiple services into one, selectable view setting. By selecting an existing Base View in a New View, users have access to the data and fields from the services designated in that Base View.

In the example below, users will select from a View of Persons 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

Base Views give users unlimited cross reference possibilities across the entire system. Once users develop a competency in Views, they can request that certain Base Views be built by System Administrators and be populated under various services as a Base View value when creating a new View.

1. From the top Navigation Bar, *right click* on the **Persons** service and select **Create View**.
2. In the **Name** field, enter **Base View for Committees & Persons**.
3. From the **Base View** field drop-down, select **PersonsWithCommittees**.



4. Click on the **Fields** tab.

5. Expand the **View** and observe the **Selected Fields** area.

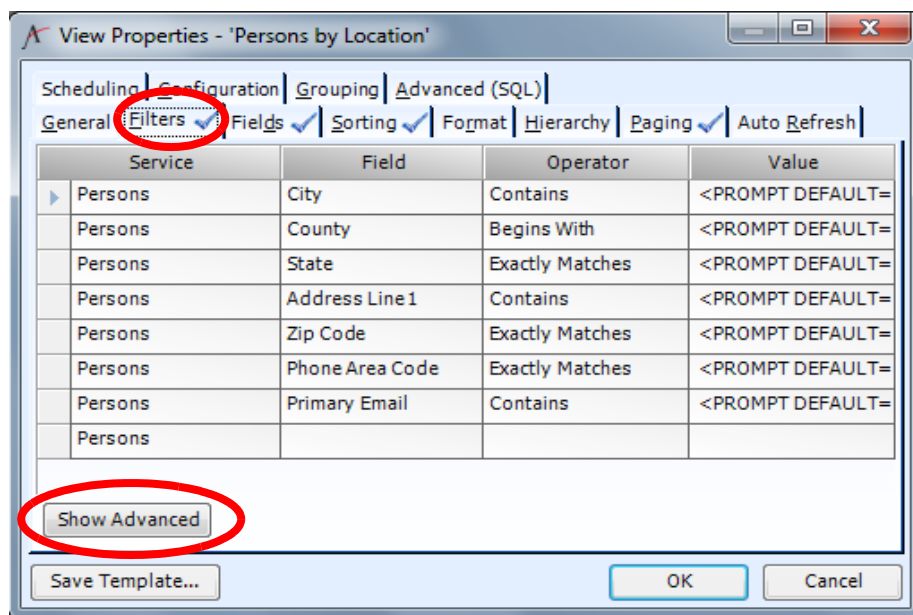
Selected Fields:			
Field	Data Type	Display Name	H
ID	Number	ID	
NameWCompany	Text	Name/Company	
AddressLine1	Text	Address Line 1	
City	Text	City	
State	Text	State	
ZipCode	Text	Zip Code	
Country	Text	Country	
PhoneAreaCode	Text	Phone Area Code	
Phone	Text	Phone	
PhoneExtension	Text	Phone Extension	
Email	Text	Email	
MemberType	Text	Member Type	
TermRank	Number	Term Rank	
TermTitle	Text	Term Title	
TermRole	Text	Term Role	
Region	Text	Region	
TermMemberStartDate	Date/Time	Term Member Start Date	
TermMemberEndDate	Date/Time	Term Member End Date	
Term	Text	Term	
CommitteeName	Text	Committee Name	
CommitteeType	Text	Committee Type	
ParentCommittee	Text	Parent Committee	
CommitteeCoordinator	Text	Coordinator	
CommitteeReach	Text	Committee Reach	

6. There are four **Services** represented in the **Fields**:
- NameWCompany - Persons Service
 - TermTitle - Committee Terms Service
 - TermRole - Term Member Service
 - CommitteeName - Committee Service
7. Select the **Filters** tab - the same Fields are represented under the **Filter Fields** column.
8. Click the **OK** button
- This will run the View without Filters - users are normally encouraged to apply at least 1-2 Filters.
 - This View can be modified/edited like any other List View.

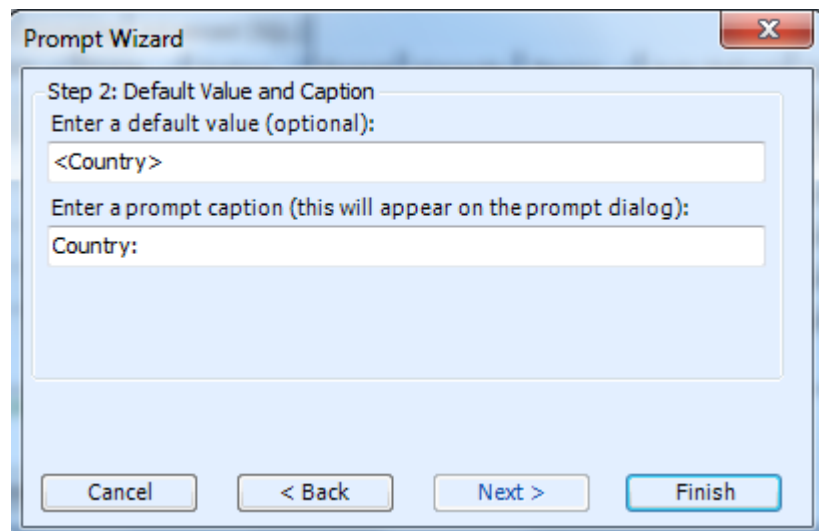
Copying & Editing Existing Views

Once familiar with the Viewing systems, users can start to edit/create more complex Prompted Views. For this exercise, users will open an existing prompted view, copy that view, and then edit it.

1. Under the Customer/Member Searches group shortcuts, click to run the **Persons by Location** shortcut.
2. For the **Prompt**, select the **Cancel** button (note: the view is active).
3. On the **Navigation Bar**, *right click* the **Persons by Location** view.
4. Select **Copy**.
 - This View is **Read Only** because it was made a shortcut from a **Shared Folder**.
 - Users are copying the View in order to **Edit**.
 - Discussion of the use of **Shared Folders** is in **Ch. 5**.
5. On the **Navigation Bar**, click on **Persons**, then *right click* on **Persons**.
6. From the list, select **Paste View**.
7. The displayed Views' **Name** should now read: **Copy of Persons by Location**, Click **Cancel** on the displayed prompt.
8. Open the View **Properties** by:
 - Clicking the **Properties** button in the View button bar
 - or *right clicking* in the View and selecting **View Properties**
9. Select the **Filters** tab - observe the previously created filters.



10. Click in the **Field** section of the last open row. (to add an additional filter)
11. From the drop-down, select **Country**.
12. From the **Operator** drop-down, select **Exactly Matches**.
13. Leave the **Value** field **Blank**.
14. To create a new prompt, click on the **Show Advanced** button.
15. Select the **Prompt Wizard** button.
16. Ensure that **Text Box** is checked.
17. Click the **Next** button.
18. From the **Enter a Prompt Caption** field, delete the words **Exactly Matches**.
19. In the **Prompt Caption** field, enter a **Colon** after the word, **Country**.
20. In the **Default Value** field, enter **<Country>**.
 - By entering a default value between < > the user ensures that if that field is NOT used in the prompt, no value will be recognized.
 - Because this uses **OR** in the Advanced Filter string, there must be a default value placeholder of **<Country>**.

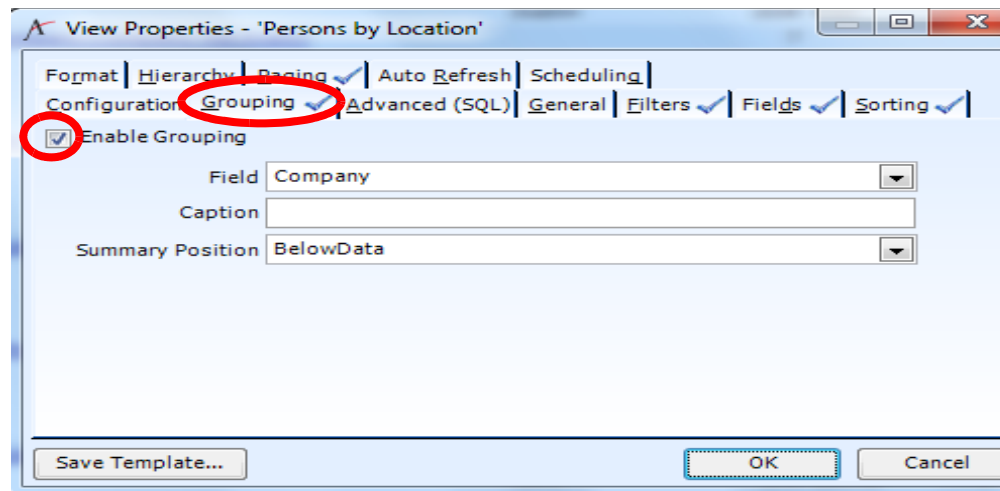


21. Click the **Finish** button.
22. Change the last Filter logic parameter from AND to **OR**.
23. Click the **OK** button.
24. In the Country: prompt, enter **Ireland**.
25. **Observe** the results.

Grouping Data in Views

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.

1. Open the **Copy of Persons By Location** view, click on the **Properties** button.
2. Select the **Grouping** tab.
3. Click the **Enable Grouping** checkbox.
4. From the **Field** drop-down, select **Company**.
5. From the **Summary Position** drop-down, select **BelowData**.



6. Select the **Fields** tab.
7. **Expand** the View Properties window.
8. Select the **ID** row by clicking once.
9. Use the bottom scroll bar, move to the right of **Selected Fields** section and find the **Aggregate Function** column.
10. Click the **Aggregate Function** cell in the **ID** row, then click the down arrow.

11. Select the **Count** value.

Selected Fields:

Field	Data	Display Name	Hyperlink	Target Field	Show Decrypted	Aggregate Function
Company	Text	Company	<input checked="" type="checkbox"/>	Name	<input type="checkbox"/>	
City	Text	City	<input type="checkbox"/>		<input type="checkbox"/>	
ID	Num	ID	<input type="checkbox"/>		<input type="checkbox"/>	Count
FirstName	Text	First Name	<input type="checkbox"/>		<input type="checkbox"/>	
LastName	Text	Last Name	<input type="checkbox"/>		<input type="checkbox"/>	
Title	Text	Title	<input type="checkbox"/>		<input type="checkbox"/>	
AddressLine1	Text	Address Line 1	<input type="checkbox"/>		<input type="checkbox"/>	
State	Text	State	<input type="checkbox"/>		<input type="checkbox"/>	

12. Click **OK**.

13. In the **Country** prompt field of the Prompt Select Box, enter **Ireland**. Click **OK**.

14. In the displayed View, observe:

- **ID** column displays the **Count** of Persons for each company in the light blue line.
- Users can **expand/collapse** company groups using the + and - buttons.

Company	ID	City	First Name	Last Name
Aer Arann	512	Dublin	Gaines	V
	854	Dublin	Victor	E
	1196	Dublin	Isaac	F
	170	Dublin	Sarah	L
	2222	Dublin	Yakov	F
	1880	Dublin	Kaitlyn	L
	1538	Dublin	Wan	I
7				
Aer Lingus Group Plc	1539	Dublin	Xia	E
	1881	Dublin	Mary	F
	2223	Dublin	Zahur	L
	171	Dublin	Tracey	F
	1197	Dublin	Kevin	J
	855	Dublin	Xander	J
513	Dublin	Hannah	C	
7				

Grouping is extremely valuable for aggregating financial data such as Orders or Payments. Users can choose multiple fields to aggregate using different functions. The following will demonstrate some of those capabilities:

1. Under **Orders** Shortcut Group, click on **Orders Balance Grouped by Company** View.
2. In the **Bill To Company** prompt field, type **Hitachi**.
3. Click **OK**.
4. Observe the view is grouped by **Company** and aggregated for **Count** in the **ID** field and **SUM** in the **Balance** field.

Orders Balance Grouped per Co.						
BillToCompany	ID	Order Date	BillToName	Line1_ProductName	Balance	
Hitachi, Ltd.	127	9/8/2009	Xanthe Ericson	Sampco Standards Volume III	\$117.00	
	434	10/2/2008	Edward Carter	4oz Sampco Glass	(\$10.00)	
	785	10/2/2008	Edward Carter	Sampco Golf Shirt	\$78.75	
	1136	10/2/2008	Edward Carter	Sampco Oxford Shirt	(\$10.00)	
	2051	1/30/2010	Dahlia Hill	End Table	\$712.50	
	2156	9/8/2009	Paige Robinson	Arm Chair	(\$10.00)	
	2324	9/8/2009	Dacey Robinson	The Sampco Way	(\$10.00)	
	2492	9/8/2009	Oliver Beck	Sampco Ski Cap	\$34.42	
	2660	9/8/2009	Edward Carter	Corporate Membership	(\$10.00)	
	2828	9/8/2009	Querida Miller	Sampco Hooded Sweatshirt	(\$10.00)	
	3092	9/8/2009	Dahlia Hill	12oz Sampco Mug	\$32.40	
	7608	7/6/2009	Edward Carter	Sampco Standards Volume I	\$0.00	
	8103	7/6/2009	Edward Carter	Student Membership	\$42.50	
	8598	7/6/2009	Edward Carter	2008 Sampco Exhibition	\$960.00	
	9093	7/6/2009	Edward Carter	Executive Leather Chair	\$425.00	
	9947	7/22/2013	Querida Miller	Student Membership	\$100.00	
	9975	7/22/2013	Paige Robinson	Student Membership	\$100.00	
10007	7/22/2013	Paige Robinson	Sampco 2013 New Student Conference	\$0.00		
BillToCompa	18				2542.57	

Preview Pane

The **Preview Pane** is an optional display area at the bottom of a view, which allows users to access a record's data without having to open the actual record. Preview Panes are configured by Administrators, but are turned on and off by end users from a View. They can be enabled for any View in Aptify, and can display any data that is contained in the view's records.

Note that Preview Panes do NOT have to display the data currently shown in the View. This allows users to see information contained on any tab inside a record. Users may also edit the data in the preview pane.

In the Persons View below, the Preview Pane button is activated, and a record is selected in the View. The Preview Pane shows Membership information from the record's Membership tab. The View itself displays basic Name, Company, Address, and Title information.

The screenshot shows the Aptify interface with a list of members and a preview pane. The list is titled "All (Page 1 of 10)" and has columns for ID, First Name, Last Name, Company, and Title. The first row is highlighted in red, indicating it is selected. The preview pane below shows membership details for the selected member.

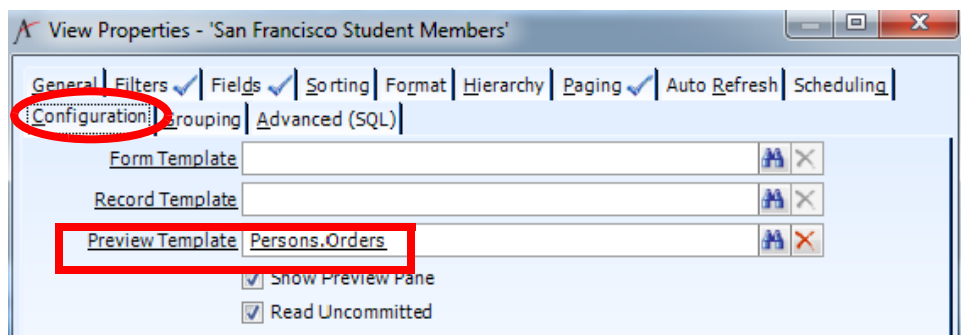
ID	First Name	Last Name	Company	Title
1	Aiesha	Baldwin	Danube Partners	Marketing Senior Director
2	Alexandra	Wade	U. Hardwick Physics AB	Marketing Senior VP
3	Athena	Scott	Akebono Cryogenics Incorporated	Marketing VP
4	Baka	Lambert	Ottoman	President
5	Dacey	Yukon	Polyhedron Power Devices	Research Associate
6	Emily	Robinson	VC Osaka Technologies Group, Inc.	Research Associate VP
7	Gabriela	Estevez	O Fiber Electric Inc	Research Director
8	Habika	Harris	X.E. Awaken Components Limited	Research Executive VP
9	Hannah	Taylor	Gemstone Solutions Group	Research Manager
10	Jessica	Pintaro	Folk och få HB	Research Senior Director
11	Madison	Harris	Frankenversand	Research Senior VP
12	Mary	Warner	France restauration	Research VP
13	Nadia	Miller	Franchi S.p.A.	Sales Associate

Member Type	Non-Member
Co. Member Type	Corporate Member
Organization	Sampco Holdings, Inc.
Status	Active
Functional Title	
Contact Rank	
Directory Rank	0
Exclude From	<input type="checkbox"/> Mail <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> Directory
Mail Code	
Carrier Route	
US Congress	
State Senate	
State House	
County District	
Dues Information	Individual
Last Dues Amount	\$2,850.00
Last Pay Date	4/7/2010 9:28:3
Dues Paid Thru	4/6/2012 9:28:4
Join Date	4/7/2010 9:28:3
Termination Date	

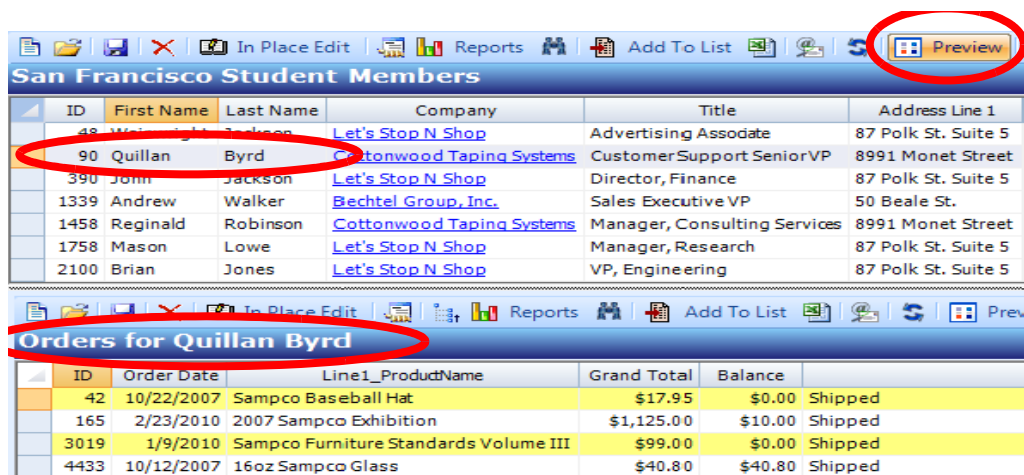
Selecting the Preview Pane

Users also have the option on a View to select any form template as a Preview Pane under the Configuration tab. This enables users to create multiple Views with differing Preview Panes. If a Preview Pane is NOT selected, the default Preview Pane will be displayed. To select a Preview Pane:

1. Open the **San Francisco Student Members** View created earlier.
2. Click the **Properties** button, then click the **Configuration** button.
3. In the **Preview Template** lookup field, enter **Persons**. Select the **Tab** button.
4. From the Lookup List that displays, scroll to click **Persons.Orders**, then click **Select**.
 - (The one with **Persons Orders Tab Sub-Template** in the **Description** field)



5. From the View Properties pane, click **OK**.
6. From the **View's** button bar, click the **Preview Pane** button.
7. Select one of the records in the View by clicking a name field of a person record.
8. Observe the **Orders** information that displays in the bottom half of the View.



9. Click Refresh button to return to previous view.

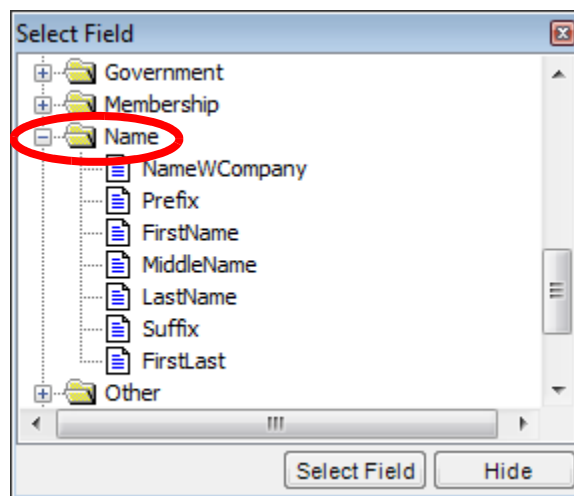
Composing a Bulk Message

In this exercise, a user will draft a sample bulk message that could be sent to the Persons who appear in a filtered view. Note that this exercise will draft the message but not actually send it.

1. Open the **San Francisco Student Members** view created earlier.
2. In the View toolbar, click the **Messaging** button.

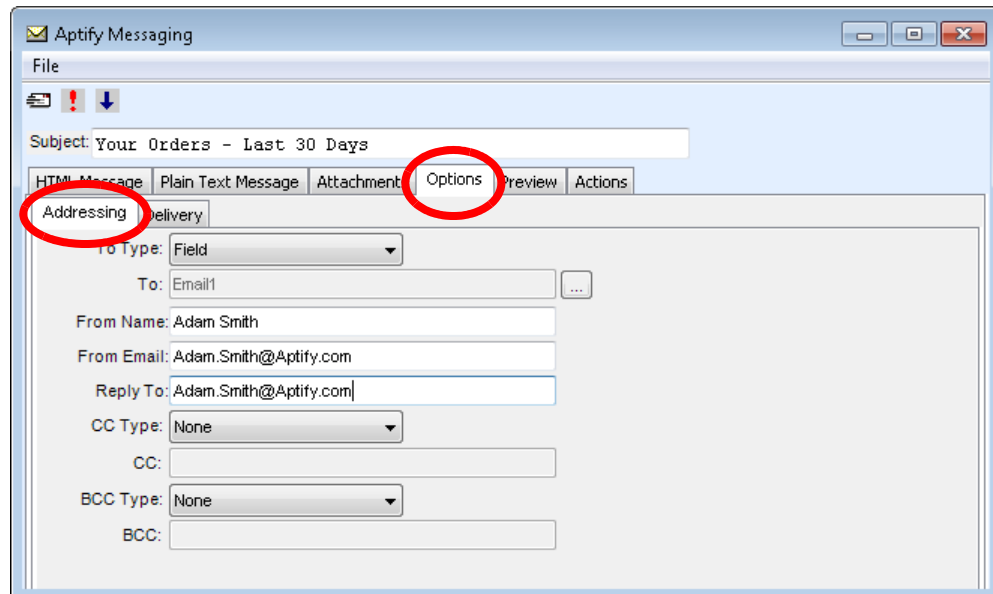


- The Aptify Messaging window appears.
3. In the **Subject** field, enter **Your Orders - Last 30 Days**.
 4. Select the **Plain Text Message** tab.
 - A user can compose messages in either HTML or Plain Text format. For this exercise, use the Plain Text format.
 5. Click in the text field and type **Dear [space]**.
 6. Click the **Insert Field** button.
 7. Expand the **Name** folder and select **FirstLast**.

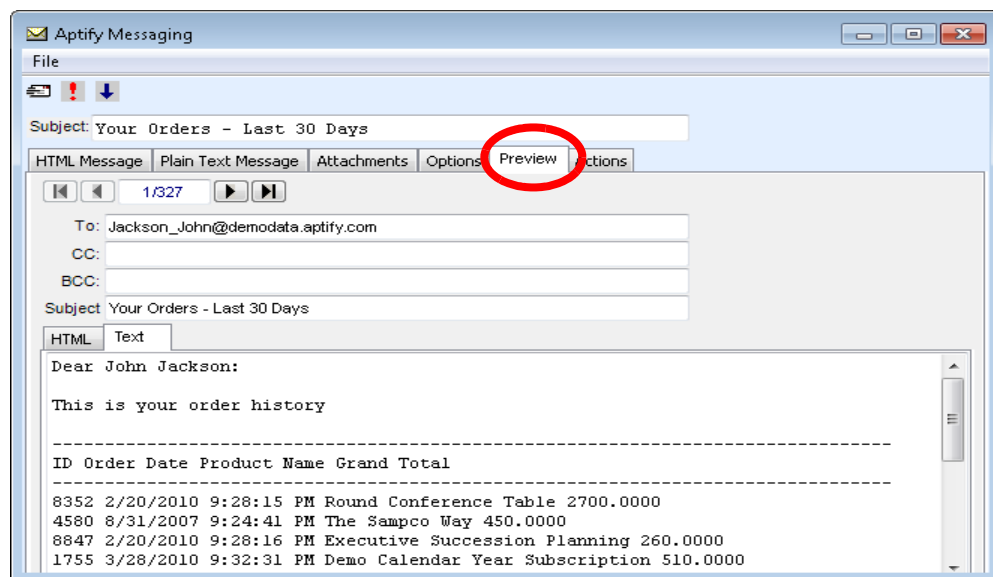


8. The message field should now read: "Dear <<FirstLast>>". Enter a colon after "<<FirstLast>>" and click the **Enter** key twice.
9. To move the cursor to the line below, click the **Enter** button.
10. Click the **Insert Part** button.
11. Locate the **Accounting** folder.
12. Expand the **Order Information** folder.
13. Select the **Order History Part**.

14. Select the **Options** tab.
15. Select the **Addressing** sub-tab.
16. In the **From Name** field, enter your name.
17. In the **From Email** and **Reply To** fields, enter your email address.



18. Select the **Preview** tab and select the **Text** sub-tab.



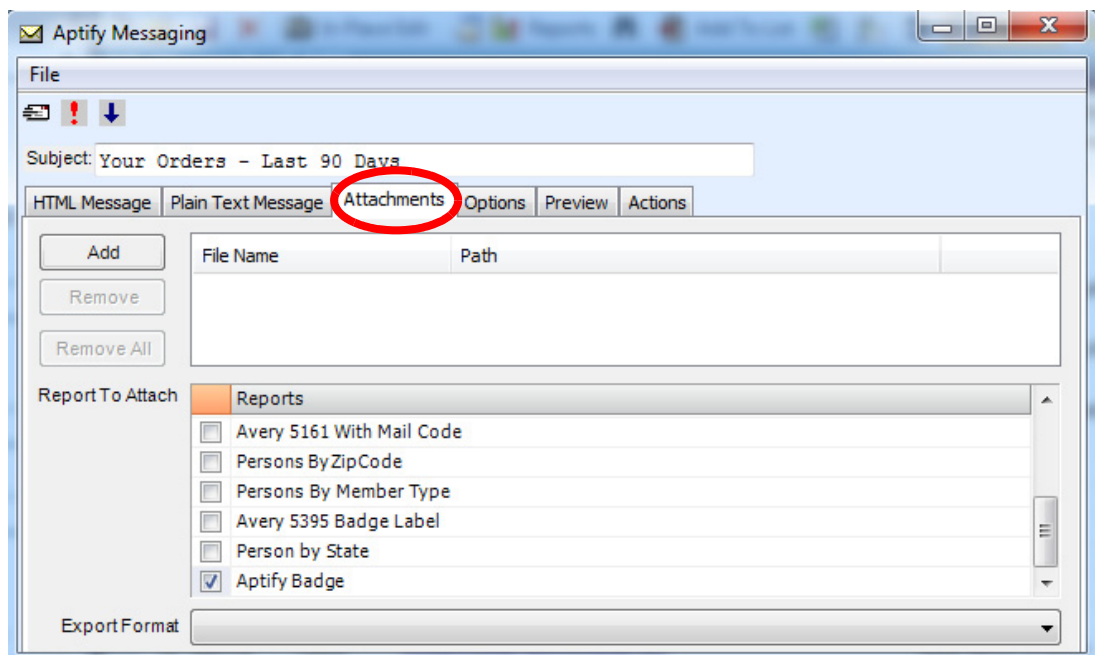
19. Use the arrow buttons to preview the personalized messages addressed to the people in your **San Francisco Student Members** view.
 - Note: the <<*FirstLast*>> field is replaced with Person's First and Last Name.
 - Note: each Person's email address appears in the **To:** field for each message.

Attaching Reports

Users can also attach Crystal Reports to a Bulk Message. This enables users to create a View for an audience that they wish to send a particular report to, and then attach a specific report, such as Invoice, Name Tent, Badge, Activity Consolidation, etc. Users would check the particular Report from the Attachments tab and send the message. The system will then send the appropriate Report to the individual user with only their relevant data.

Note: It is necessary to be upgraded through Service Pack 5.5.1 for this function.

1. Click the **Attachments** tab of the **Bulk Message**.
2. Click the scroll bar to the right of the **Report to Attach** section.
3. Scroll and then select the **Aptify Badge** report.



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

4. 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.

Topic Codes

Topic Codes provide a sophisticated way to collect **information about the areas of interest of customers/members**. Topic codes can be used effectively for **customer/member profiling** as well as driving personalized content to a particular user's Web site (if the organization is using the optional Aptify E-Business Suite). Topic codes can also be a great resource for target marketing or determining the viability of a new product or service offering.

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.

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 which is useful when targeting marketing campaigns.

Note that Topic Codes are also referred to as "Personal Interest Codes."

The screenshot shows a web browser window titled "New Topic Codes Record". The window has a standard toolbar with icons for file operations and navigation. Below the toolbar is a tabbed interface with four tabs: "General", "Topic Code Entities", "Topic Code Possible Values", and "Attachments". The "General" tab is selected. The form contains the following fields:

- Name**: A text input field.
- Description**: A text area.
- Parent**: A lookup field with a search icon.
- Status**: A dropdown menu with "Active" selected.
- Type**: A dropdown menu with "Code" selected.
- Value Type**: A dropdown menu with "Yes/No" selected.
- Default Value**: A text input field with "Yes" entered.
- Start Date**: A date field with a calendar icon, showing "5/24/2012".
- End Date**: A date field with a calendar icon.
- Web Enabled**: A dropdown menu with "Global" selected.

The Topic Code service is located under the **Administration – CRM** application, but Views of Topic Codes can be created from any of the major services.

In the default Aptify installation, all users have the ability to add or edit Topic Code records. In practice, Topic Codes are typically configured by administrators or advanced users so this form will not be reviewed in great detail in this end user manual.

This illustrates how **Topic Codes** appear on a record form.

After a user has added Topic Codes to a particular service, the available codes appear under the Topic Codes tab.

In the example above from the Employees form, there are Top-Level Topic Code categories. Each of these categories can have one or more sub-topics that a user can access by clicking a category's hyperlink.

Aptify creates a Topic Code link between the record and the code (or codes) that a user checked when the record is saved.

The Browse by Category sub-tab displays topic codes by category. After selecting one or more topic codes, save the record. Then a user can click the **All Selected Topics** tab to see a list of the codes they selected (regardless of category).

Note that selecting a Top Level topic code within the Browse by Category sub-tab does not automatically enable all of that category's sub-topics. Users need to place a check mark next to each Topic Code individually.

From either sub-tab, a user can click the **Check All** button at any time to select all of the codes on that particular screen (it does not enable all topic codes, just the ones that are currently visible). Likewise, a user can de-select all of the visible codes by clicking the **Un-Check All** button.

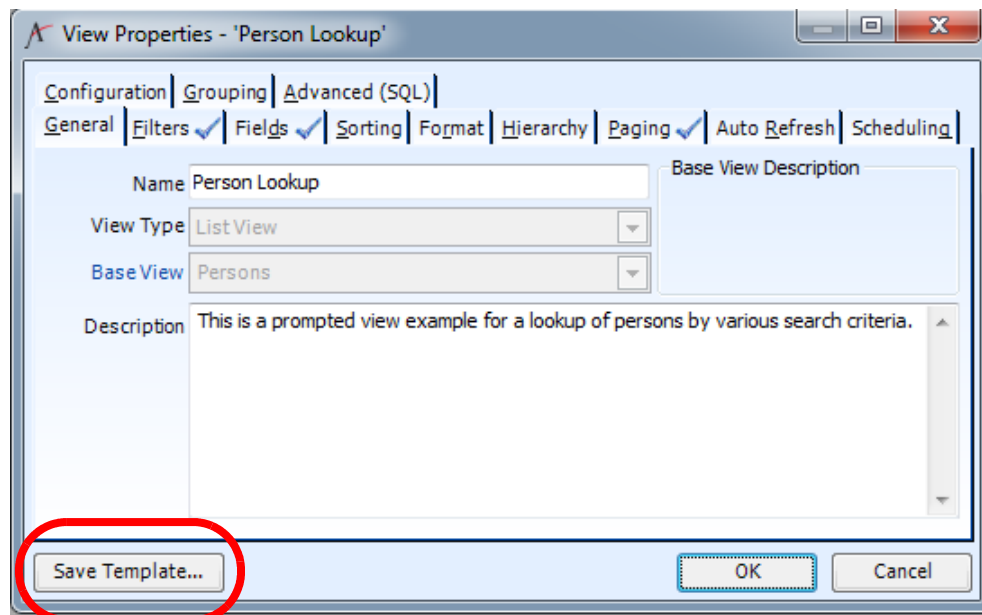
When a user wants to analyze records based on Topic Code selection, they can create a filtered view of the Topic Code Links service in of the major services (Persons, Companies, etc.)

Creating View Templates

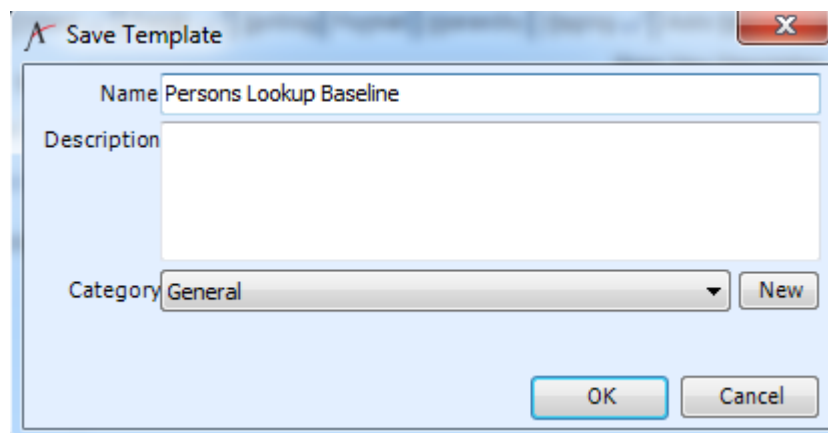
Templates can be created for Views as well as records. View Templates enable users to load a pre-formatted View's settings into a new View. View properties such as Filters, Sorting, Formatting, and Scheduling are automatically copied from the desired Template into the new View. This saves time and prevents mistakes from being made when creating the view.

Creating a View Template

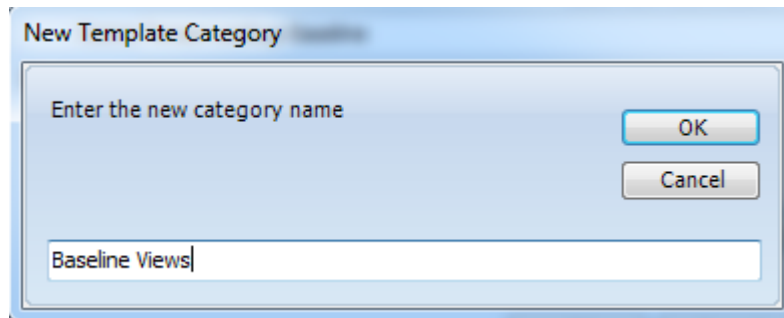
1. Open the **View Properties** of the view desired to use as a Template.
2. In the lower left corner, click the **Save Template** button.



3. Enter the **Name** of the Template.



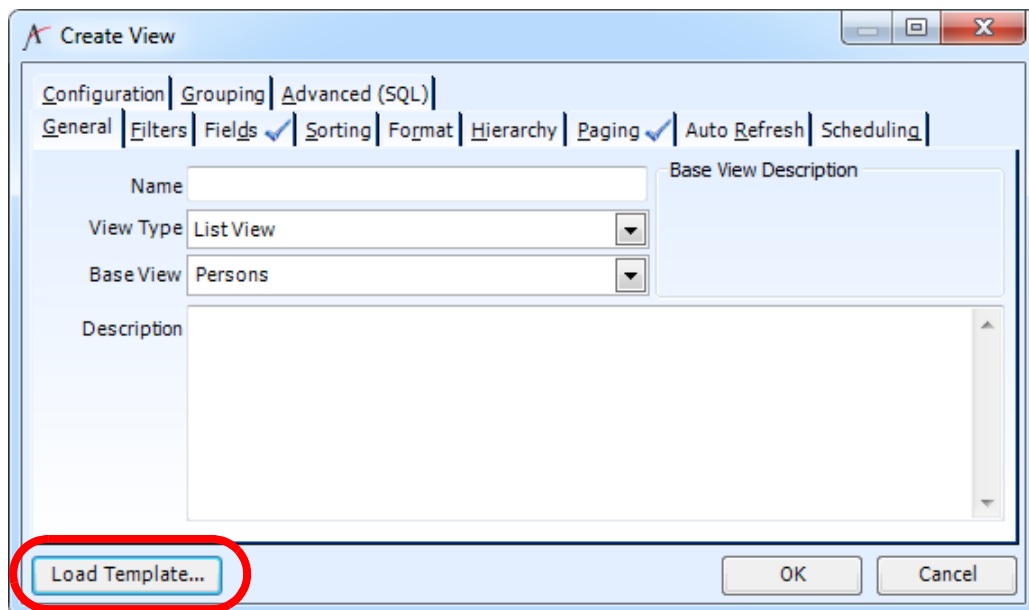
4. At the far right of the **Category** field, click the **New** button.



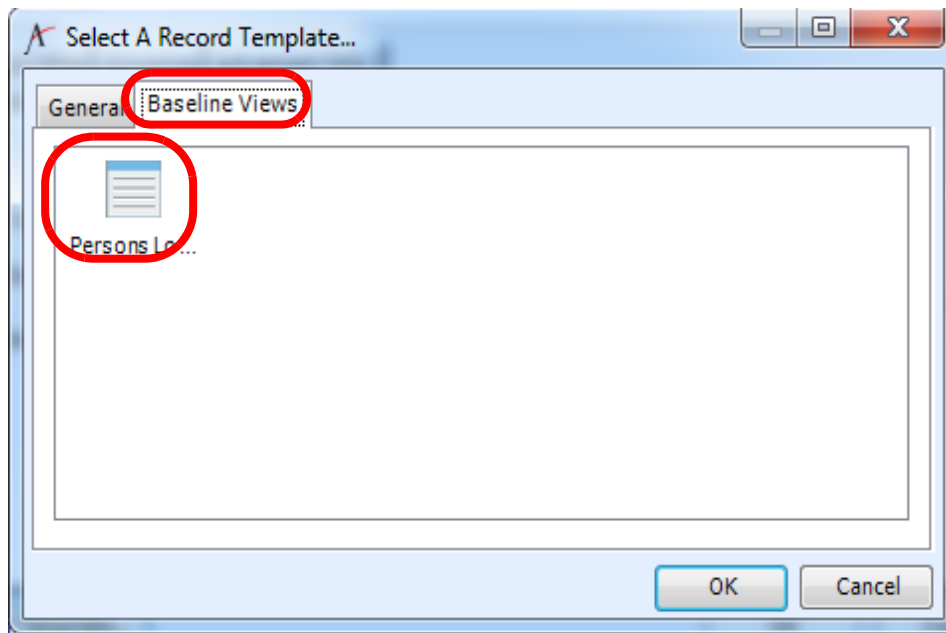
5. Enter a New Category Name.
 - Defining a Category name creates a folder into which users can organize views.
6. Click **OK** to save the Category.
7. Click **OK** to save the Template.

Loading a View Template

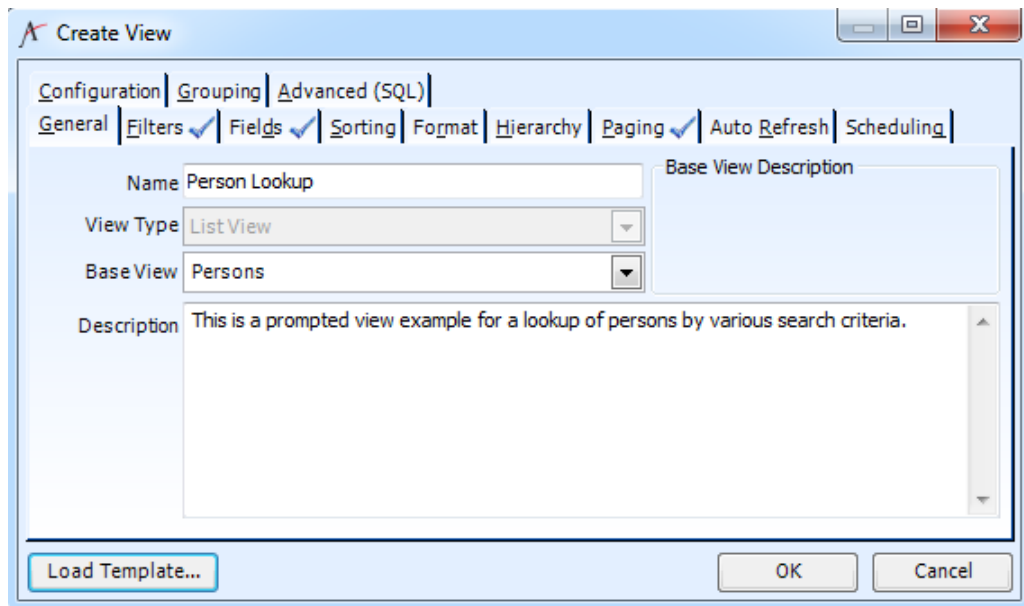
1. **Create a View** from the desired service.
2. In the lower left corner of the **View Properties** window, click the **Load Template** button.



3. Click the desired **Category**, which appear as tabs.



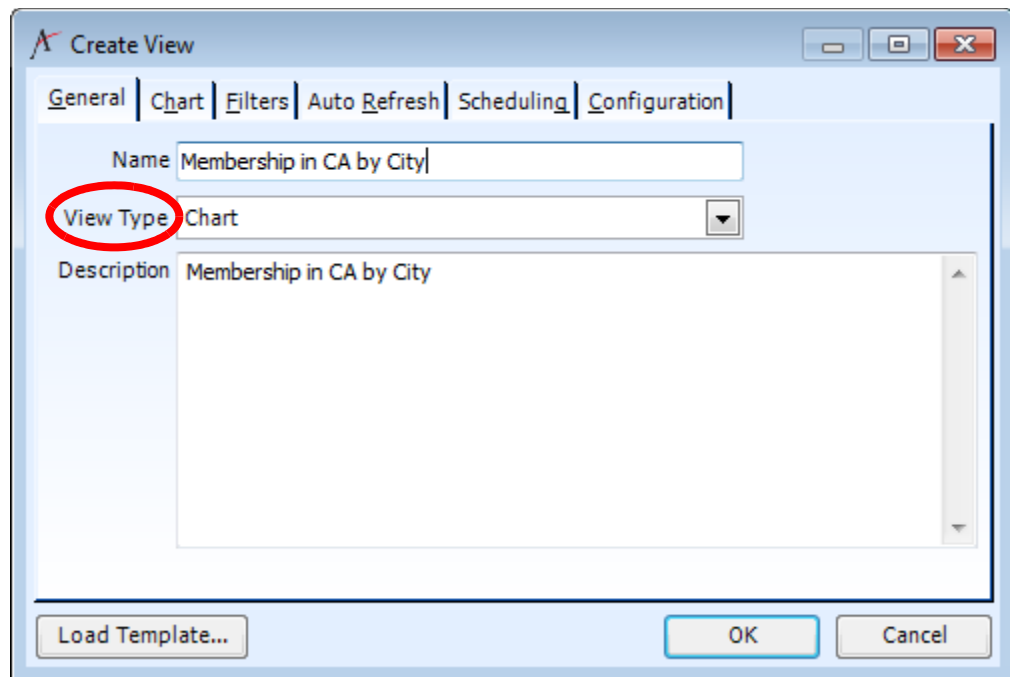
4. Double-click the desired **View** template to load it.
5. **Observe** that the view's settings have been imported into the new View.



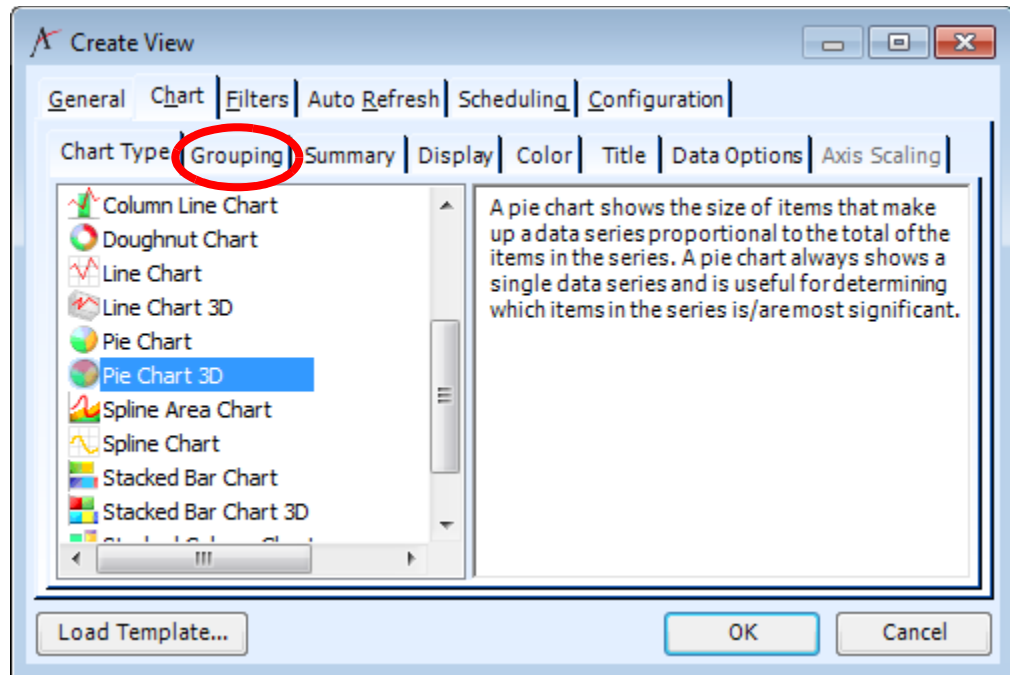
Creating a Chart View

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

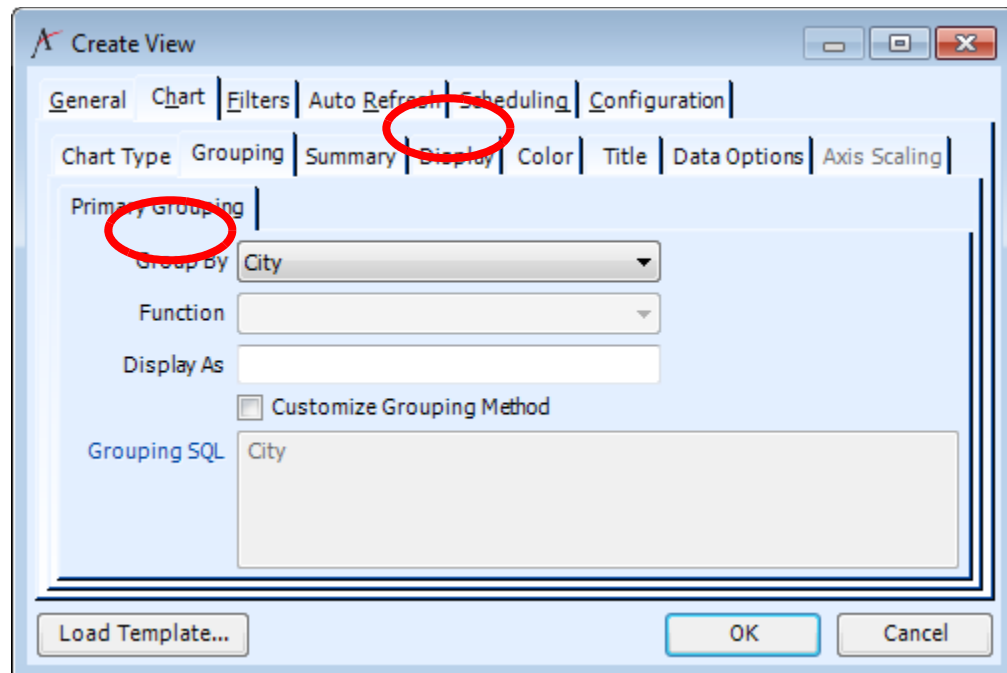
1. *Right click* the **Persons** service and select **Create View**.
2. **Name** the view **Individual Membership in CA by City**.
3. From the **View Type** drop-down list, select **Chart**.



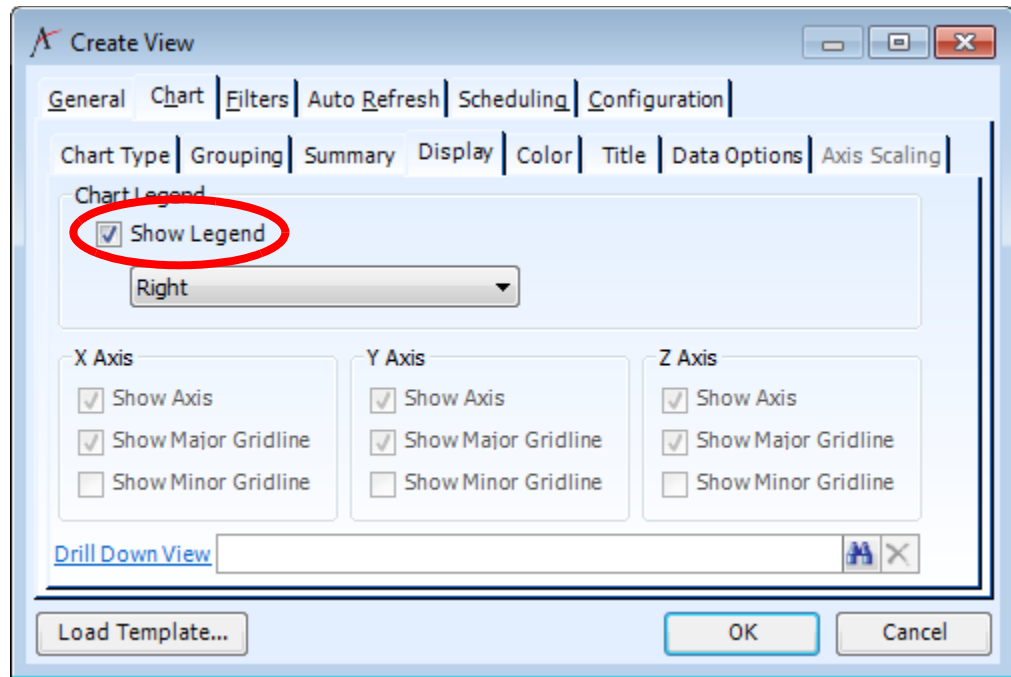
4. Click the new **Chart** tab and select the **Pie Chart 3D** type.



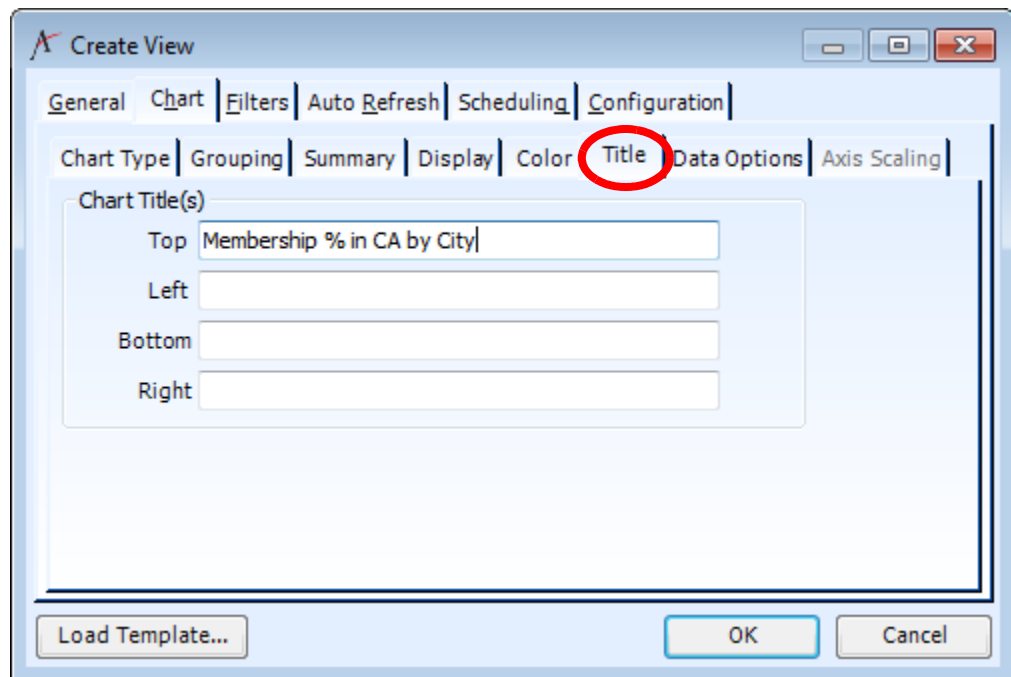
5. Under the **Charts** tab, click the **Grouping** sub-tab.
6. From the **Group By** drop-down list, select **City**.



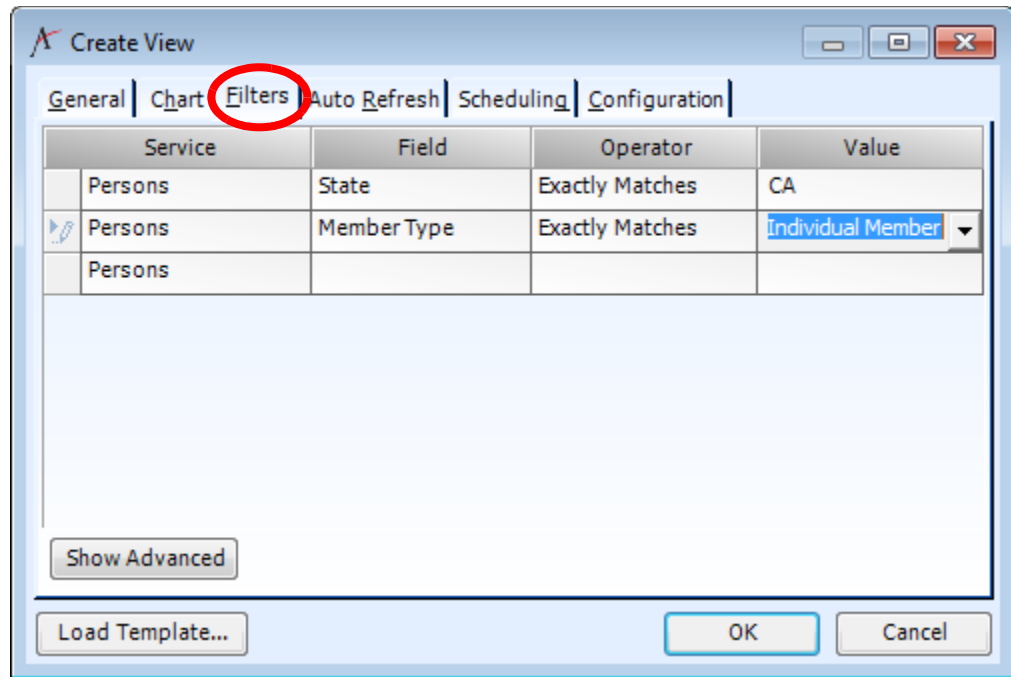
7. Click the **Display** sub-tab and select **Show Legend**.



8. Click the **Title** sub-tab and in the **Top** field, enter **Membership % in CA by City**.

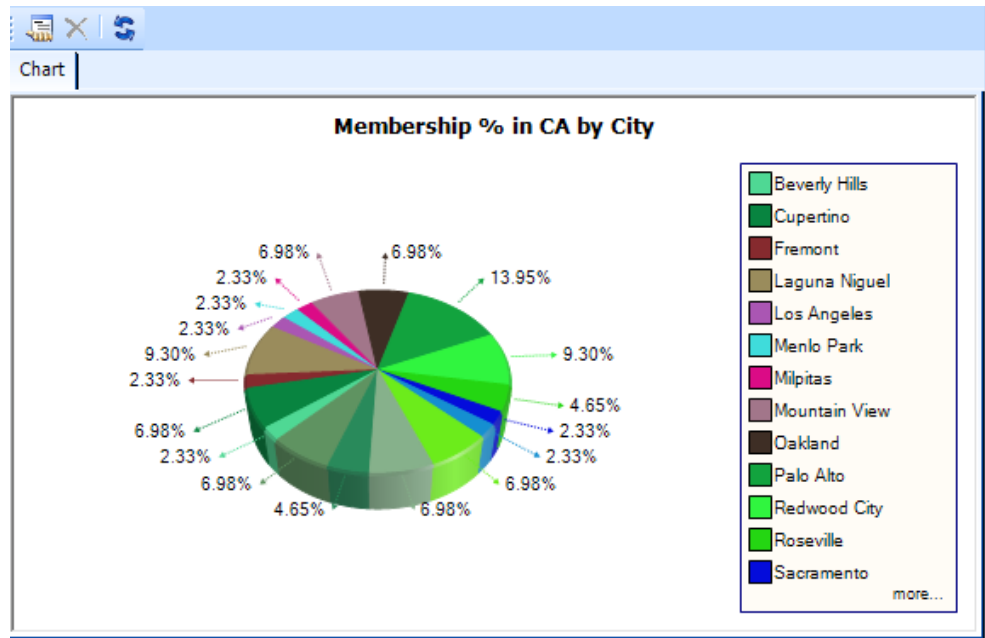


9. Click the **Filters** tab and set up filters to match those in the following figure.



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

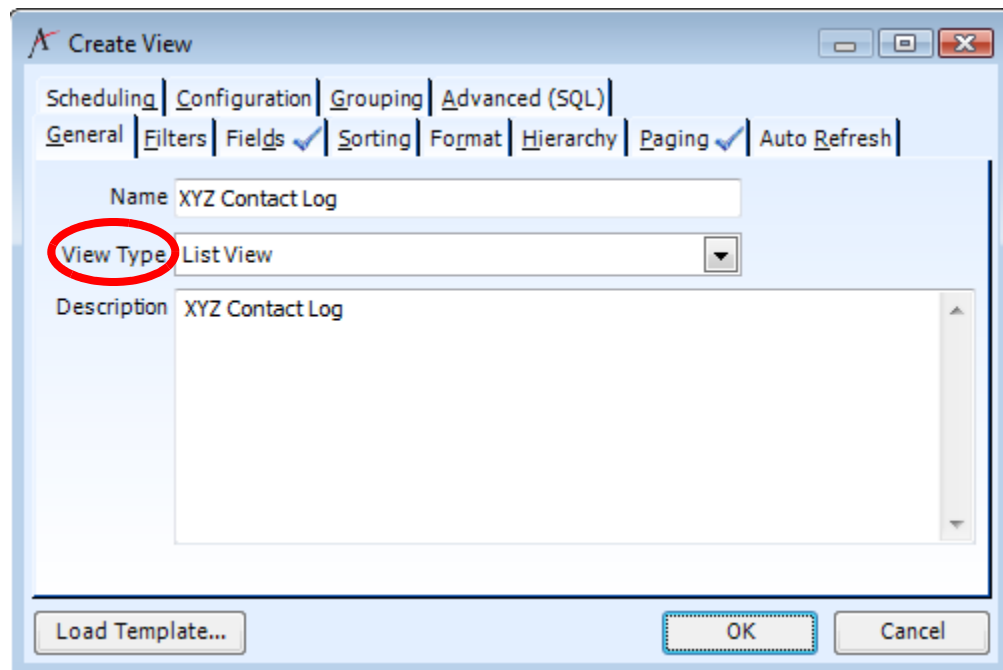
11. Then close the view.



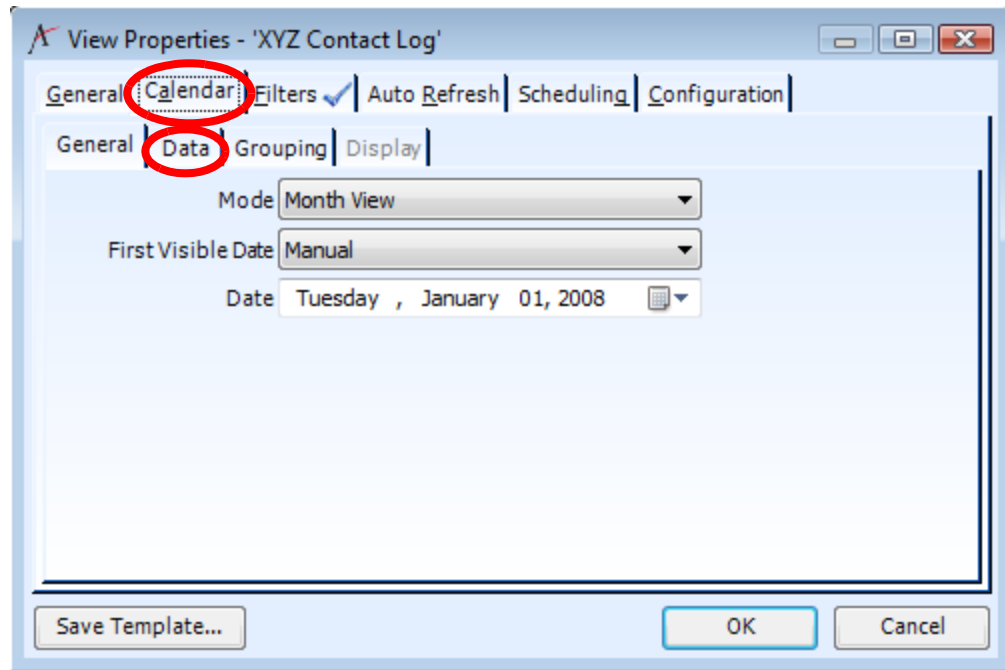
Creating a Calendar View

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.

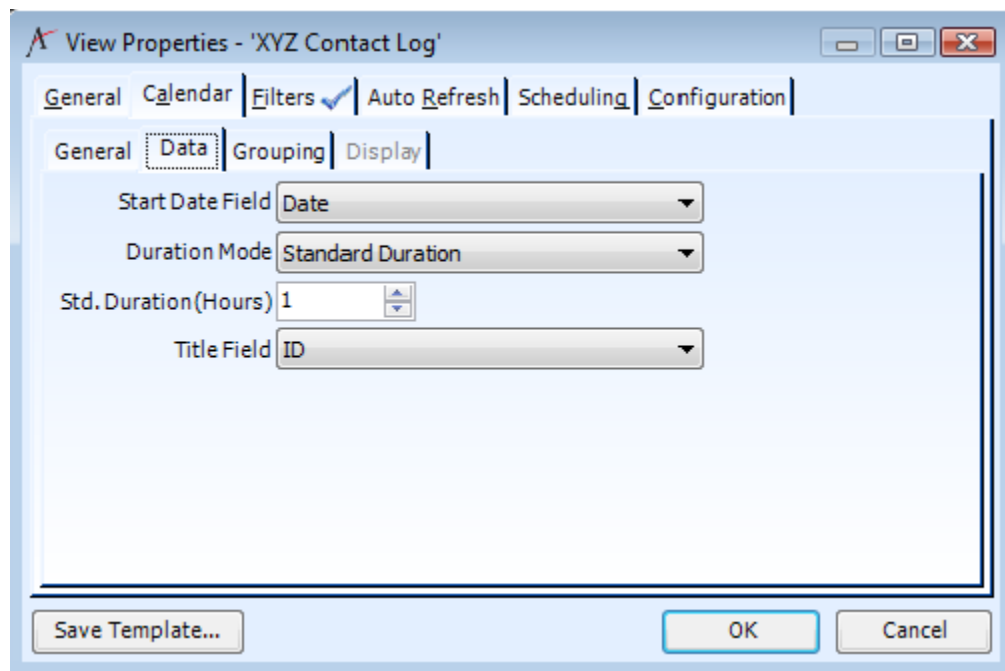
1. Click the **Meetings** service on the left.
2. From the top Navigation tool bar, *right click* the **Meetings** service and select **Create View**.
3. **Name** the View **Upcoming Meetings**
4. From the **View Type** drop-down, select **Calendar**.



5. Click the new **Calendar** Tab.
6. From the **Mode** drop-down, select **Month View**.
7. From the **First Visible Date** drop-down, select **Manual**.
8. From the **Date** drop-down, select the **1/1/2008**.

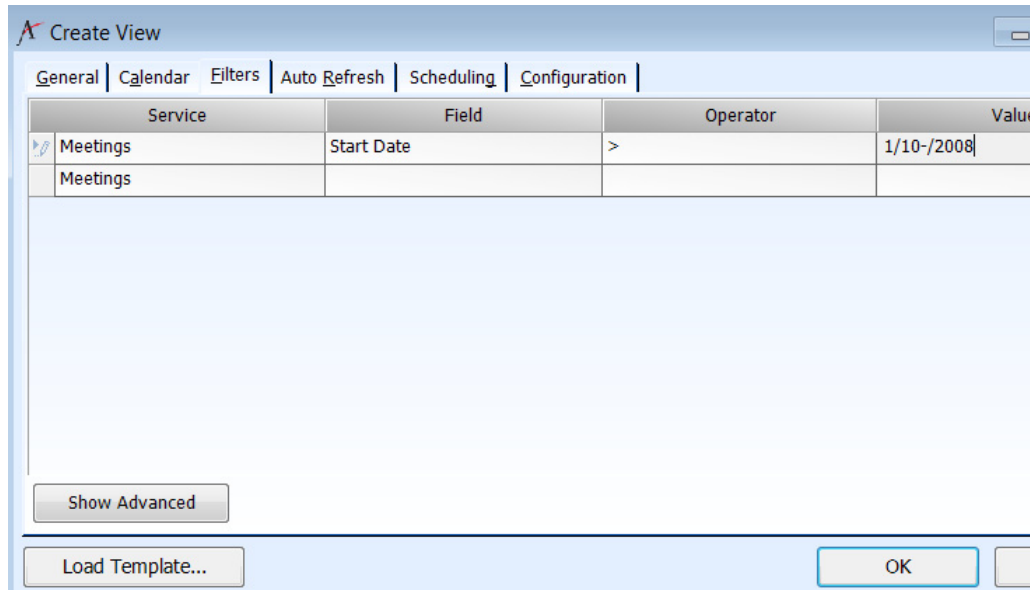


9. Click the **Data** sub-tab.
10. From the **Start Date Field** drop-down, select **Start Date**.
11. From the **Duration Mode** drop-down, select **Standard Duration**.
12. From the **Title Field** drop-down, select **ID**.

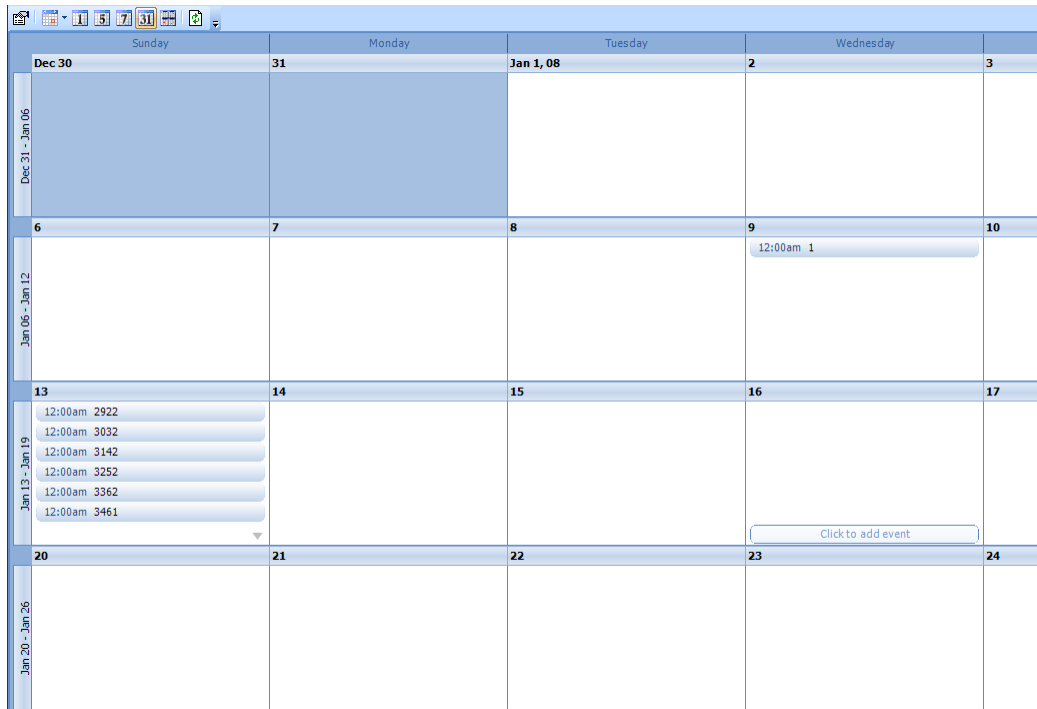


13. Click the **Filters** tab.
14. Keep **Meetings** as the **Service**.

15. For the **Field**, select **Date**.
16. For the **Operator**, select the **>** symbol.
17. For the **Value**, select **1/1/2008**.



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



Pivot Tables

Pivot Tables are interactive tables used to summarize data. Users Rotate (or *pivot*) rows and columns to view different summaries of data. A Separate Pivot Table tab appears in View and users employ 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 image shows two screenshots of a Pivot Table. The top screenshot shows the Pivot Table with 'BillToCompany' as the row field and 'Order Lines ProductID' as the column field. The bottom screenshot shows the Pivot Table with 'Order Lines ProductID' as the row field and 'BillToCompany' as the column field. Red arrows and black arrows indicate the movement of the fields between the two screenshots.

		Order Date	
		12/4/2003	12/10/2003
BillToCompany	Order Lines ProductID	Sum of GrandTotal	Sum of GrandTotal
Danube Partners	5		60.03
	9	25	
	10	75	
	Total	100	60.03
Gemstone Solutions Group			
Lotus Risk Services Limited			
Osaka Crystal Technologies, Inc.			
Ottoman			25
Toadstool Interface Technology Inc 123		100	
X.N. Chemical Systems Co., Inc.		550	
Grand Total		750	85.03

		Order Date	
		12/4/2003	12/10/2003
Order Lines ProductID	BillToCompany	Sum of GrandTotal	Sum of GrandTotal
5			60.03
8		100	
9	Danube Partners	25	
	Gemstone Solutions Group		
	Lotus Risk Services Limited		
	Osaka Crystal Technologies, Inc.		
	Ottoman		25
	Toadstool Interface Technology Inc 123	25	
	X.N. Chemical Systems Co., Inc.	75	
	Total	125	25
10		525	

The two screen shots above illustrate 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: Many Pivot Tables can be replaced by Base Views. Base Views are often more effective than Pivot Tables as they use considerably less processing power, are more easily displayed in dashboards, and provide more data management options.

Managing and Sharing Views

Managing Views

All pre-created Folders, Views, and Shortcuts in BASE (out of the box/Training/Sandbox) Aptify are tied to the Baseline Admin profile. That metadata is then tied to the **Baseline** profile via Shared Folders. When Administrators are initially setting up End Users in Aptify, they should **ALWAYS** copy the **Baseline** profile in step 6 of the User Administration Wizard. By copying the Baseline Profile that user will automatically receive the pre-loaded Views, Shortcuts, Shared Folders, and developed Dashboards.

The Baseline Admin profile and the Baseline profile are **NOT** the same; the Baseline Admin profile is used to house all metadata (Folders, Views, Shortcuts, etc.) - it is the profile from which ALL metadata should be distributed. The Baseline profile is the most complete END USER profile that is LINKED to all the metadata owned by the Baseline Admin user. By linking the data from the Baseline Admin to the Baseline profile, the metadata is not replicated and can be governed for ALL users that copy the Baseline profile by editing it from the Baseline Admin.

Views that display for the Baseline User are non-editable since they are linked back to the Baseline Admin's Shared Folders. This includes all views that initially linked to Shortcuts in the left hand side of the screen. When users become more comfortable with the Viewing system they can then copy those views, edit them, and create new views.

In addition, **ANY changes** made by the Baseline Admin to the views located in Shared Folders, **will be inherited** by any users connected to that Shared Folder.

If an administrator wants to transfer control of the Baseline Admin's Folders or Views to another user, possibly a Manager of a particular department, the Administrator could run the **Entity Bulk Operation Wizard** from a view of the Baseline Admin's Folders or Views.

Once Aptify is installed and a Client goes live, there are two major methods of distributing Views to End Users:

Creating/Sharing 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.

Creating/Sharing Views via Shared Folders:

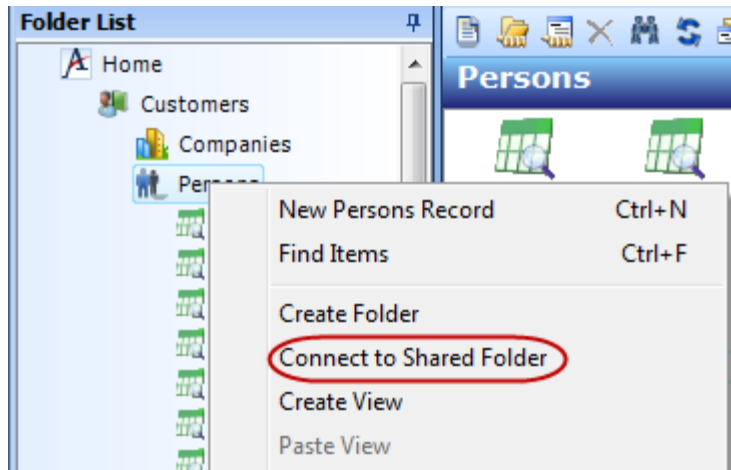
1. A manager (or end user) creates a View in their local instance of Aptify.
2. A manager (or end user) places a View in a Shared Folder.
3. The manager (or end user) informs their team that they can connect to the Shared Folder.

Important - Aptify recommends that most new and critical (not pre-loaded) end user Views be created by an administrator or manager and then placed on a dashboard, or shared. This helps reinforce standard business processes, ensures Views accuracy, and allows managers to quickly update the Views for all end users. End users should be encouraged to create their own views by copying those existing views and editing them to ensure a baseline of accuracy.

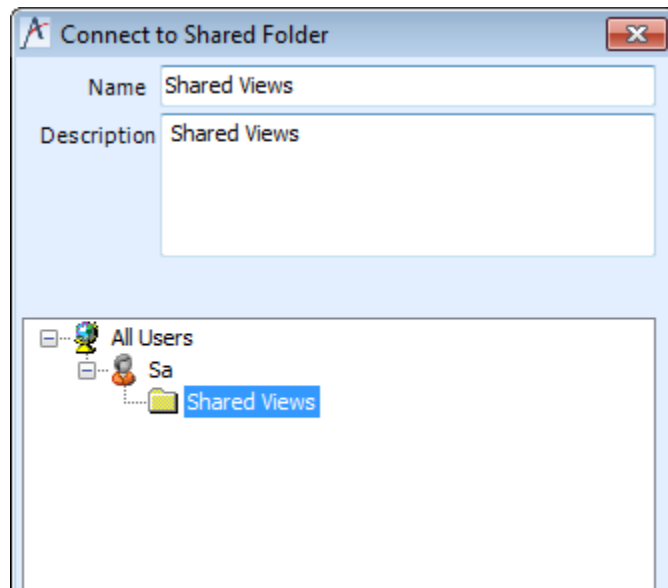
Connecting to Shared Folders and Views

Follow these steps to connect to a shared view:

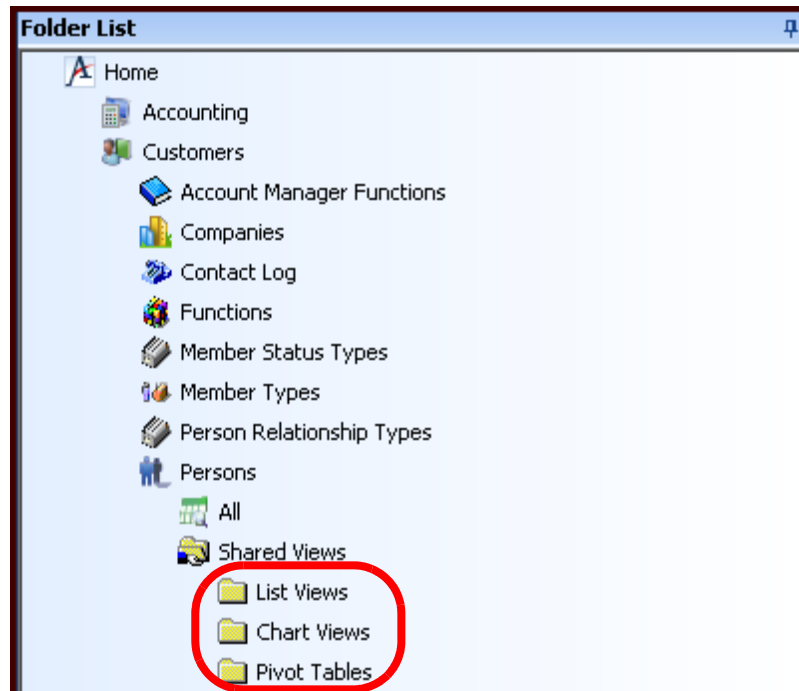
1. From the Navigation Bar, *right click* the **Persons** service and select **Connect to Shared Folder** from the list.



2. Expand the desired user (in this case, the SA user), then select the **shared folder**.



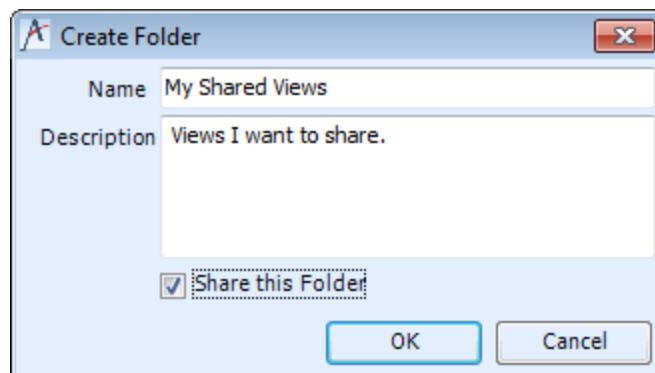
3. Click **OK** to add the Shared Folder to the Folder List.
4. Expand the Shared Folder to see the list of shared view folders.



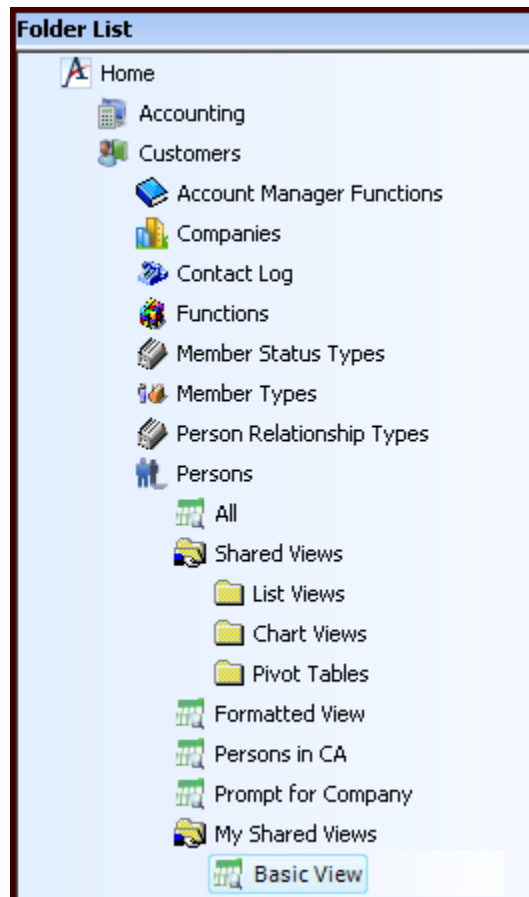
5. Expand a shared view folder to see all the views that are currently being shared.
6. Disconnect from the shared folder.
 - *Right click* the shared folder and from the list, select **Delete**. Click **OK**.

Creating a Shared Folder

1. *Right click* the **Persons** service and select **Create Folder**.
2. In the **Name** field, enter **My Shared Views**.
3. In the **Share this Folder** box, place a check mark.
 - A user can also create folders for their own use (for example, if a user wants to organize their views into categories). In this case, they should not check the **Share this Folder** box and the views in this folder will not be available to other users.



4. Click **OK**.
5. From the folders list, move the **Basic View** to the Shared folder. Note that this feature only works with the Folder List. Views cannot be dropped from the Navigation Bar
 - Click the **Basic view**.
 - While holding down the left mouse button, drag the view into the shared folder.
 - Release the left mouse button to move the view into the folder.



6. Other users can now connect to the shared folder and open the view that have been shared.

Any changes made by the owner of the folder will be inherited by the end user that connects to a shared folder.

Objective.....	5.1
Exporting a View to Microsoft Excel.....	5.2
How Reporting Works.....	5.7
Running a Standard Export Report.....	5.8
Running a Crystal Report.....	5.11

Objective

In this section, users will understand some of the Aptify reporting features and how views are used to report and communicate data, including how Aptify integrates with Microsoft Excel, how to run a Report, and how Aptify integrates with Business Objects Crystal Reports.

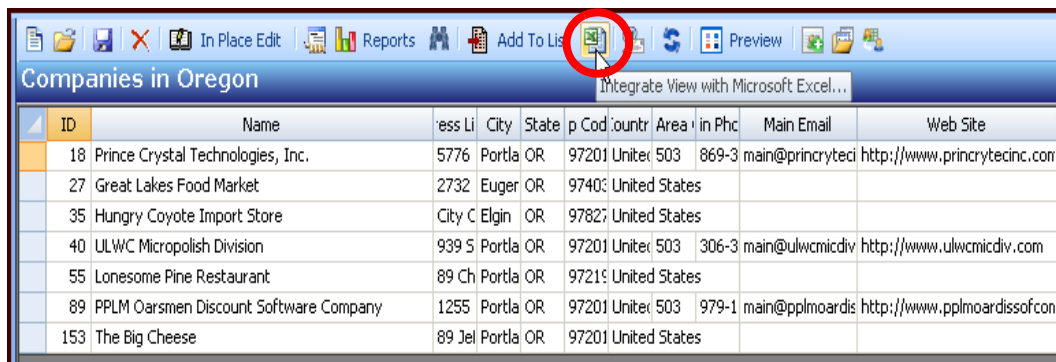
After completing this section, users will know the process for:

- 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 Microsoft Excel using the Excel Integration Wizard.

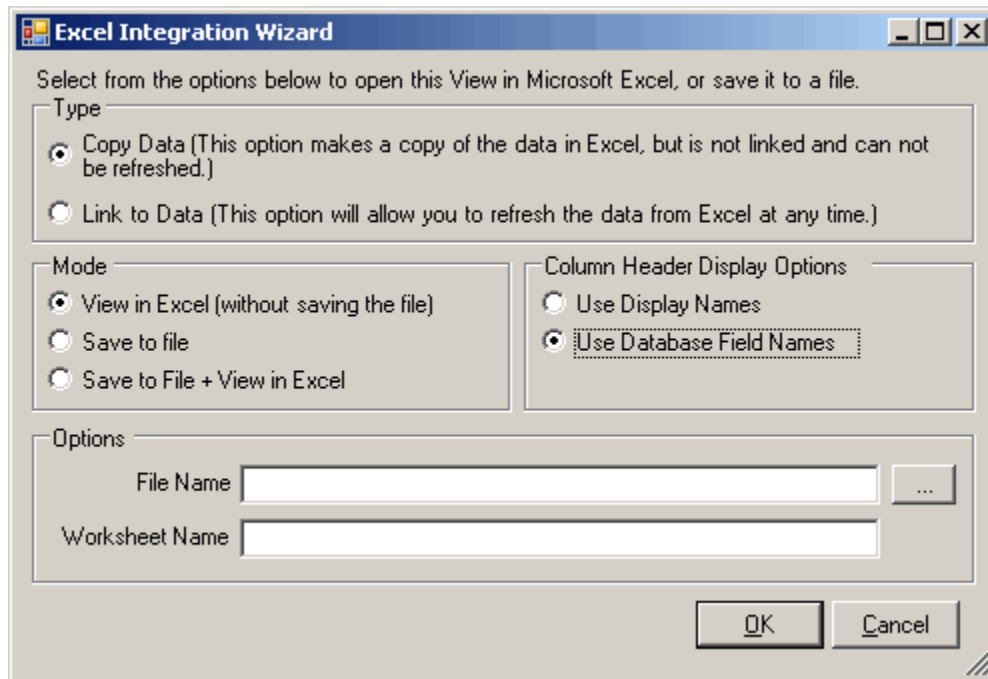
- Create a new list view from the **Companies** service, specify the following characteristics:
 - Use a filter to display only Companies in Oregon.
 - Edit the Fields to display only the Name, City, State, and ZipCode.
 - When finished, the view should display the sample companies in Oregon. Try to create this view on your own. If you need assistance, follow these steps:
 - Select the Companies service and select **Create View**.
 - Assign a name for the view (like "Companies in OR").
 - Click **Filters**.
 - From the **Field** drop-down list, select **State**; from the **Operator** drop-down list, select **Exactly Matches**; in the **Value** field, enter **OR**.
 - Click **Fields**.
 - Move fields between the two display columns so that only Name, City, State, and ZIPCode appear in the Selected Fields column.
 - Click **OK**.
- From the view button bar, click the **Export to Excel button** to launch the Excel Integration Wizard.
 - 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 user has selected a record, *right click* within the view and select Clear Record Selection from the pop-up list before clicking the Microsoft Excel Export icon.



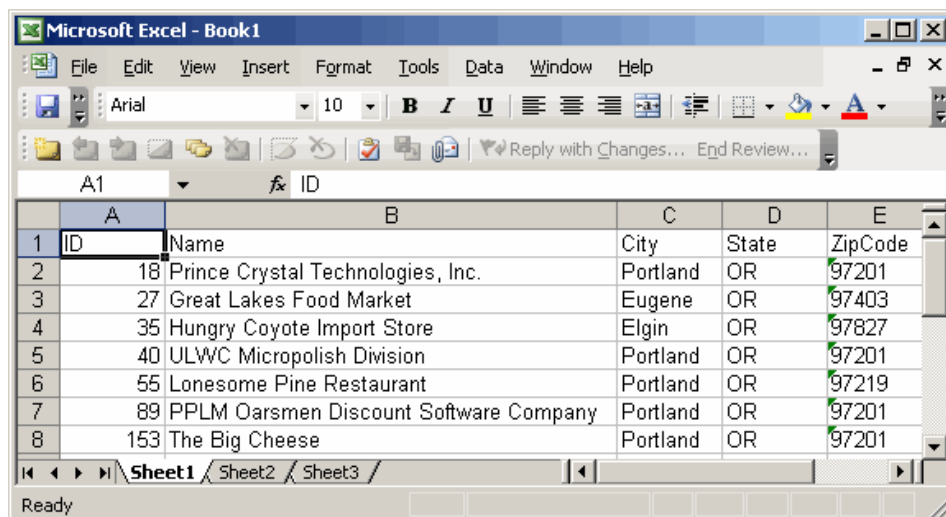
ID	Name	Address	City	State	Zip Code	Country	Area	Phone	Main Email	Web Site
18	Prince Crystal Technologies, Inc.	5776	Portla	OR	97201	United States	503	869-3	main@princrytec	http://www.princrytecinc.com
27	Great Lakes Food Market	2732	Euger	OR	97403	United States				
35	Hungry Coyote Import Store		City C	Elgin	OR	97827	United States			
40	ULWC Micropolish Division	939 S	Portla	OR	97201	United States	503	306-3	main@ulwcmicdiv	http://www.ulwcmicdiv.com
55	Lonesome Pine Restaurant	89 Ch	Portla	OR	97219	United States				
89	PPLM Oarsmen Discount Software Company	1255	Portla	OR	97201	United States	503	979-1	main@pplmoardis	http://www.pplmoardissofcon
153	The Big Cheese	89 Jel	Portla	OR	97201	United States				

- From the **Type** options, select **Copy Data**.
- From the **Mode** options, select **View in Excel**.

- From the **Column Header Display Options**, select **Use Database Field Names**.

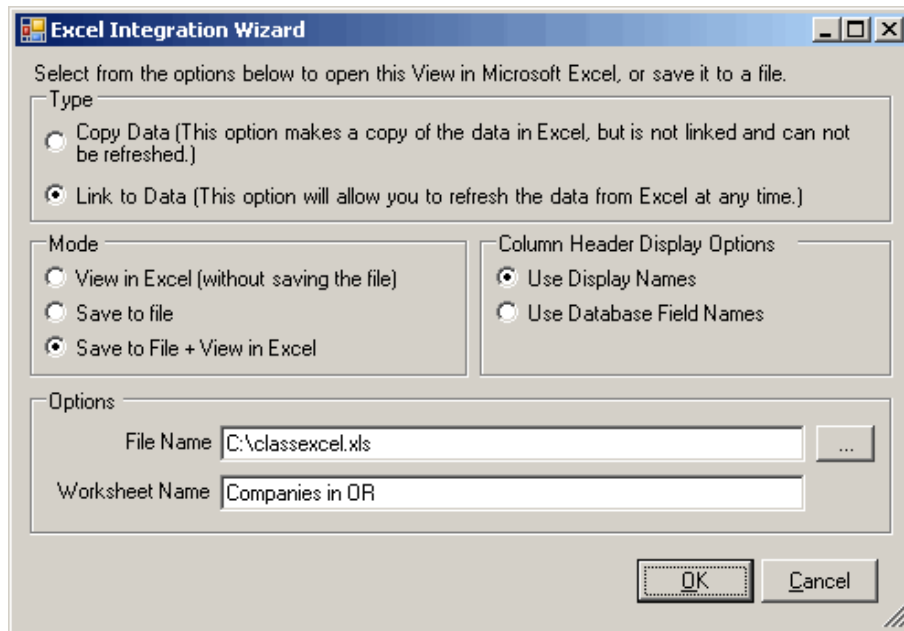


- Click **OK**.
 - A Microsoft Excel window appears; the window contains the information from the view.
 - After exporting the view data to Microsoft Excel, a user can format the spreadsheet and resize the columns as necessary.



- Close Microsoft Excel without saving the file.
- From the **Companies in OR** view, click the **Microsoft Excel Export** icon again.
- Select **Link to Data** from the **Type** options.

10. Select **Save to File + View in Excel** from the **Mode** options.
11. Select **Use Display Names** from the **Column Header Display Options**.
 - Users will not notice a difference between these two options since the Field Name and the Display Name are identical for these company fields.
 - Note that the Display Name refers to a parameter in the field's definition and not to a Display Name a user modifies in a view's properties screen. Therefore, an administrator would need to edit the Display Names to have an effect on the exported data.
12. Enter **CLASSEXCEL.XLS** in the **File Name** field.
 - A user can also browse for a location to store the file by clicking the **ellipsis (...)** button.
 - Microsoft Excel files use the **.XLS** extension.
13. In the **Worksheet Name** field, enter **Companies in OR**.



14. Click **OK**.

	A	B	C	D	E
1	ID	Name	City	State	ZipCode
2	18	Prince Crystal Technologies, Inc.	Portland	OR	97201
3	27	Great Lakes Food Market	Eugene	OR	97403
4	35	Hungry Coyote Import Store	Elgin	OR	97827
5	40	ULWC Micropolish Division	Portland	OR	97201
6	55	Lonesome Pine Restaurant	Portland	OR	97219
7	89	PPLM Oarsmen Discount Software Company	Portland	OR	97201
8	153	The Big Cheese	Portland	OR	97201

Excel Notes:

- Depending on how Microsoft Excel is configured on a computer, a user may see a message box concerning automatic data refreshes before the spreadsheet opens. Select the “disable automatic refresh” option if this message appears.
- Once Microsoft Excel opens, it displays the CLASSEXCEL.XLS file, which contains the contents of the view.
- Note that the Linked Data is automatically formatted in Microsoft Excel.
- If a user only sees “Linked_Data” in the first cell, *right click* on the cell and select **Refresh Data** from the pop-up list.
- Note that the Workbook Name a user configured appears on the spreadsheet tab.
- To manually refresh the data, *right click* within the data area and select **Refresh Data** from the pop-up list.

15. Return to Aptify but do NOT close Excel.

16. Open a Companies record the user created and change the **State** to **OR**.

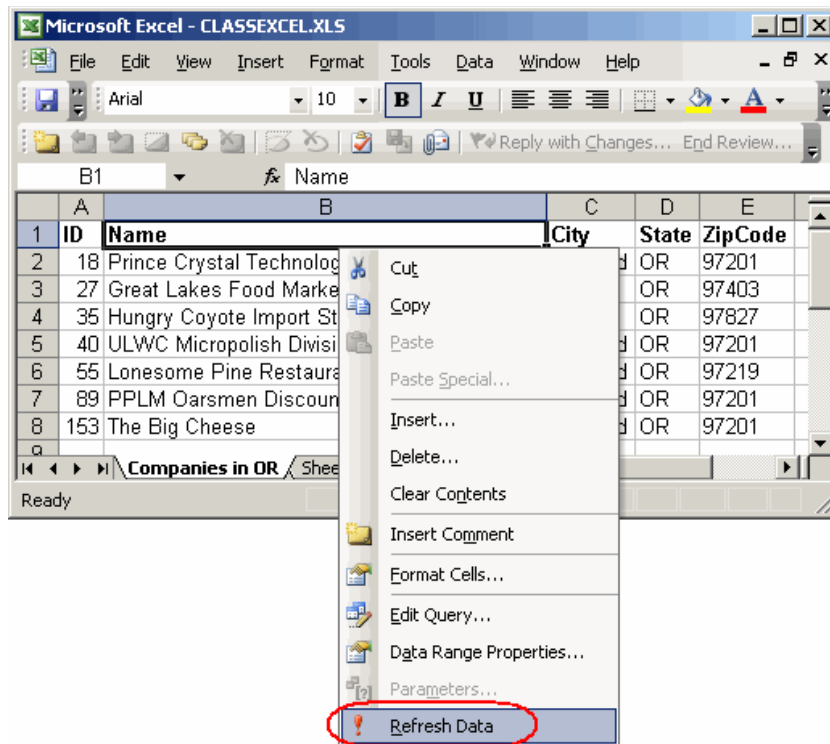
17. Save and close the Companies record.

18. Open the **Companies in OR** view (or refresh the view if it is already open).

- the Companies record should appear in the view (along with the Companies records of the other students in class).

19. Return to the CLASSEXCEL.XLS spreadsheet

20. Right click within the data area and select **Refresh Data** from the pop-up list.



- The new Companies records should now appear in the spreadsheet.
21. Open this Company record again and change the **State** field back to its original value.
 22. Save and close this Companies record.
 23. Open the **Companies in OR** view (or refresh the view if it is already open).
 - Only the original records should appear in the view.
 24. On the CLASSEXCEL.XLS spreadsheet, *right click* within the data area and select **Refresh Data** from the pop-up list.
 - The spreadsheet only displays the original records.
 25. Open the View Properties dialog for the **Companies in OR** view.
 26. Click **Fields** and to the **Selected Fields** column, add the **MainPhone** field.
 27. Click **OK** to return to the Aptify desktop.
 - The MainPhone field should now appear in the view.
 28. On the CLASSEXCEL.XLS spreadsheet, *right click* within the data area and select **Refresh Data** from the pop-up list.
 - The new MainPhone field is not added to the spreadsheet. When the Excel Integration wizard's **Type** is set to **Link to Data**, Aptify updates the Excel file with changes made to the displayed fields; it does not update the Excel file to reflect changes made to a view's properties.
 29. Close Microsoft Excel.
 30. Close the Companies in OR view.

How Reporting Works

With the Report Wizard, a View can be exported to almost any report format. The Report wizard can generate **standard reports** or **mailing labels**, **export records** to another format, **print name badges**, and more. Note that the Report Wizard automatically creates a new Lists record when generating a report. This List contains the records that appear in the selected View.

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 the 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.

Other reports that are specific to a service are listed on various category tabs in the Report Wizard. Aptify ships with several service-specific reports which may be modified or replaced as required. Contact the System Administrator to add client-specific reports to a particular service.

Note that 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.

While the View system provides sophisticated capabilities to filter and sort data, it simply shows results in a tabular format. To provide robust output, Crystal Reports® is integrated into the View system through the Report Wizard.

Crystal Reports is a database reporting tool created by Crystal Decisions (<http://www.crystaldecisions.com>). **An administrator can create new customized Crystal Reports for an organization but users need to purchase a license from Crystal Decisions first.**

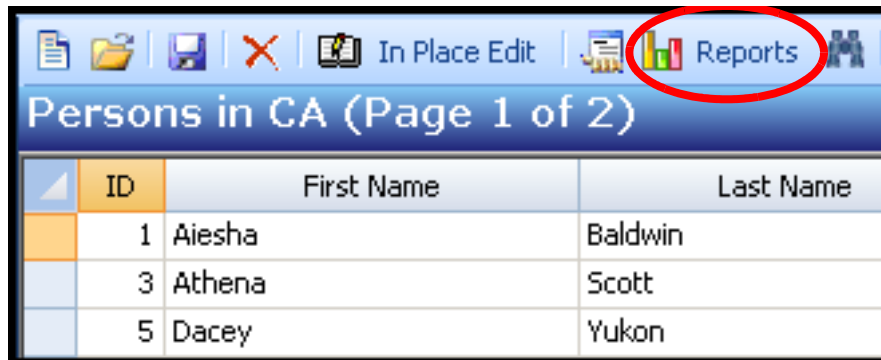
Aptify provides a wide variety of Crystal Reports with Aptify that can be used without purchasing a license from Crystal Decisions. These reports include creating a pie chart to analyze view data or mailing labels which can be used to send new literature to customer/members.

However, if a user wants to develop new reports or edit existing reports, they would need to purchase a license to Crystal Reports from Crystal Decisions for every developer responsible for report writing. These licenses are not provided by Aptify.

Running a Standard Export Report

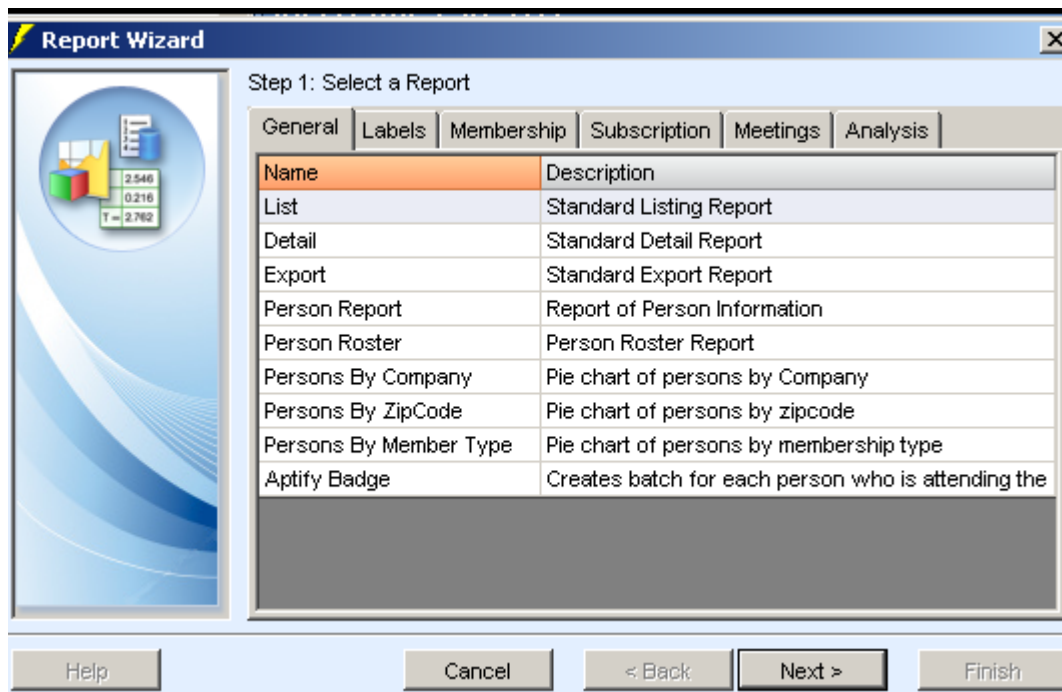
In this section, a user will learn how to export data from a view to a text file.

1. Create a new **Persons** view that displays persons whose **State** exactly matches **OR**.
2. After loading the view, click the **Report Wizard** icon in the toolbar.
 - Alternatively, a user can *right click* within the view and select **Report Wizard...** from the pop-up list.



ID	First Name	Last Name
1	Aiesha	Baldwin
3	Athena	Scott
5	Dacey	Yukon

3. Select the **Export** report (under the General tab) and click **Next**.



Report Wizard

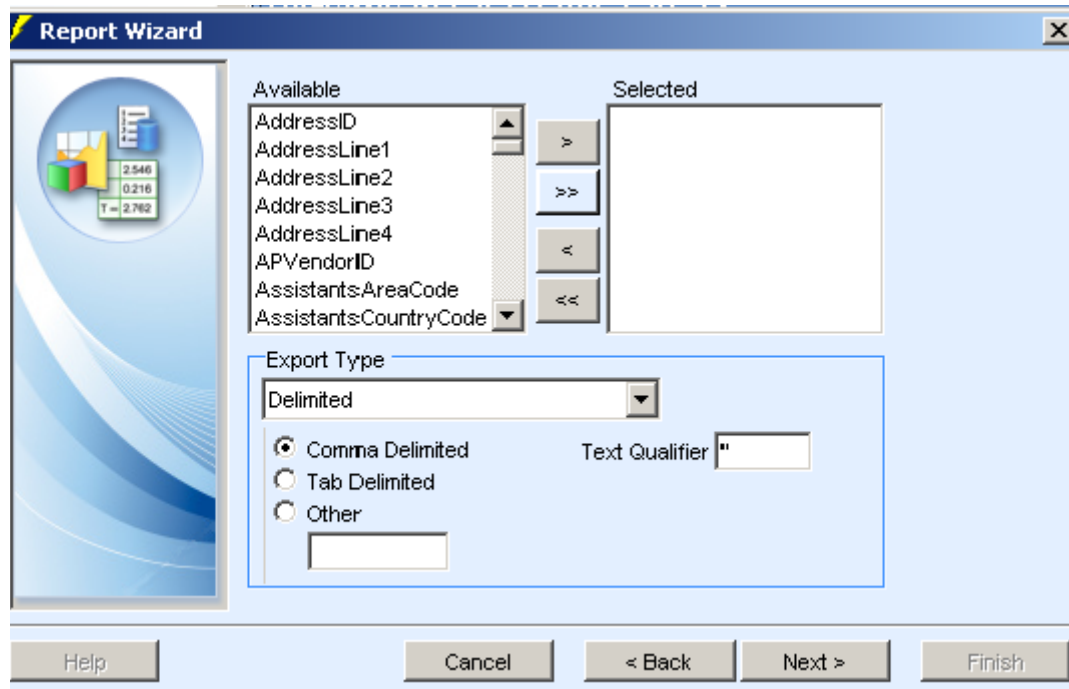
Step 1: Select a Report

General | Labels | Membership | Subscription | Meetings | Analysis

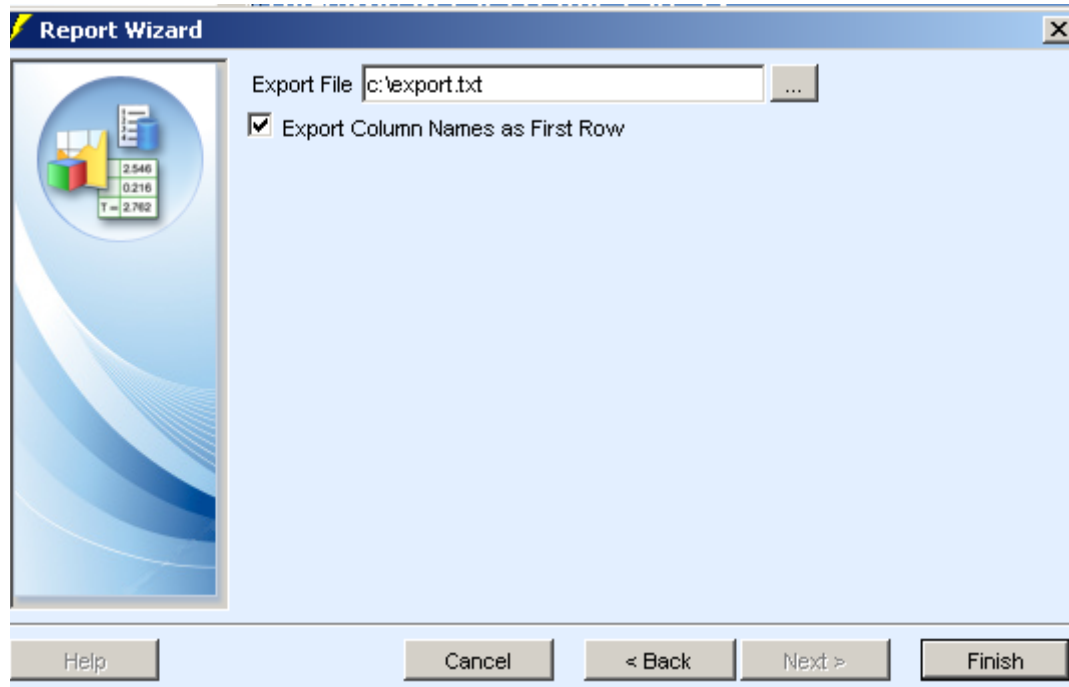
Name	Description
List	Standard Listing Report
Detail	Standard Detail Report
Export	Standard Export Report
Person Report	Report of Person Information
Person Roster	Person Roster Report
Persons By Company	Pie chart of persons by Company
Persons By ZipCode	Pie chart of persons by zipcode
Persons By Member Type	Pie chart of persons by membership type
Aptify Badge	Creates batch for each person who is attending the

Help Cancel < Back Next > Finish

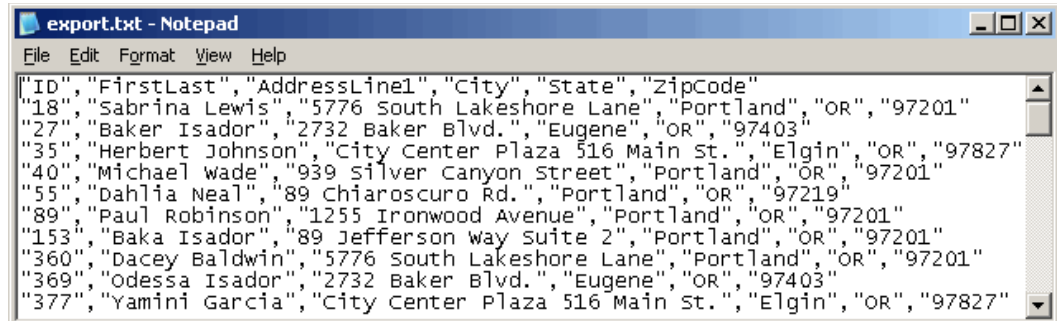
4. Move the following fields to the Selected column: **AddressLine1**, **City**, **FirstLast**, **State**, and **ZipCode**.



5. Click **Next** to continue.
6. Click **Finish** to create the export file.
 - Users will use the default file name and location for this file. The wizard will create a file called **export.txt** and place it in their computer's C: root folder.



7. Click **OK** when prompted that the export operation has completed successfully.
 - If a user wants to see what the exported data looks like, they can open the export.txt file using Notepad. It will look something like this:



```
export.txt - Notepad
File Edit Format View Help
"ID","FirstLast","AddressLine1","City","State","ZipCode"
"18","Sabrina Lewis","5776 South Lakeshore Lane","Portland","OR","97201"
"27","Baker Isador","2732 Baker Blvd.","Eugene","OR","97403"
"35","Herbert Johnson","City Center Plaza 516 Main St.","Elgin","OR","97827"
"40","Michael wade","939 Silver Canyon Street","Portland","OR","97201"
"55","Dahlia Neal","89 Chiaroscuro Rd.","Portland","OR","97219"
"89","Paul Robinson","1255 Ironwood Avenue","Portland","OR","97201"
"153","Baka Isador","89 Jefferson way suite 2","Portland","OR","97201"
"360","Dacey Baldwin","5776 South Lakeshore Lane","Portland","OR","97201"
"369","Odessa Isador","2732 Baker Blvd.","Eugene","OR","97403"
"377","Yamini Garcia","City Center Plaza 516 Main St.","Elgin","OR","97827"
```

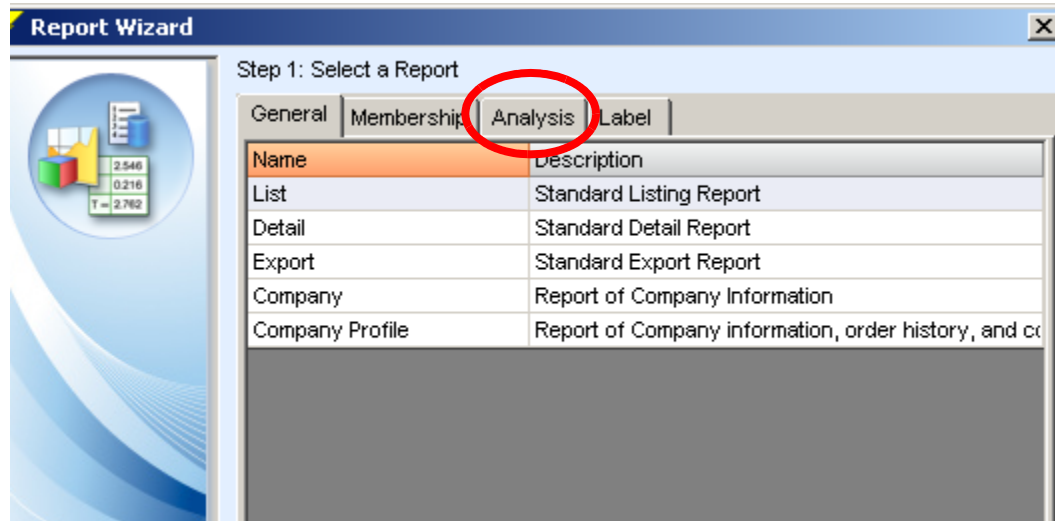
- After creating the export file, a user can import its contents into another program, such as Microsoft Word or Excel.

Running a Crystal Report

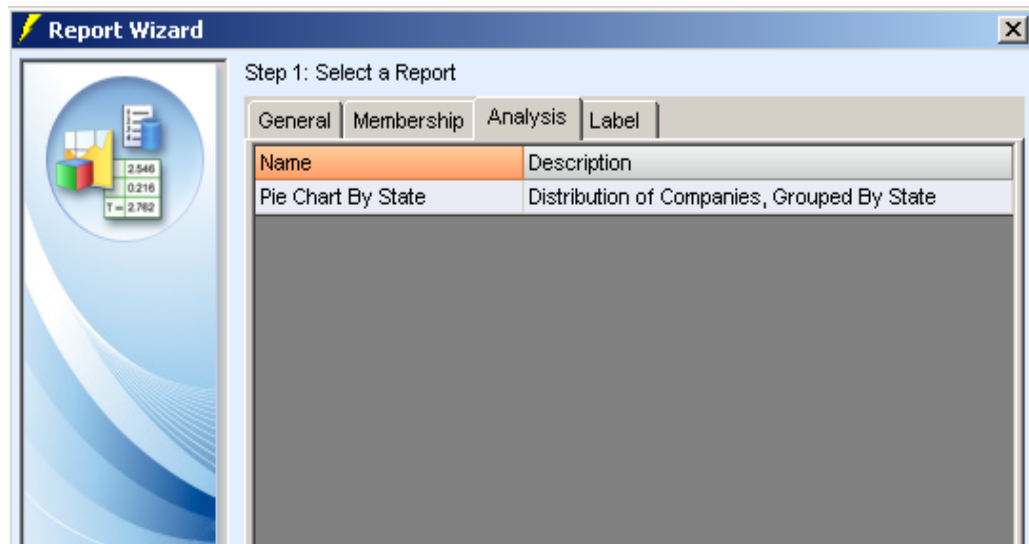
In this section, users learn how to run two specific Crystal Reports.

Running an Analysis Report

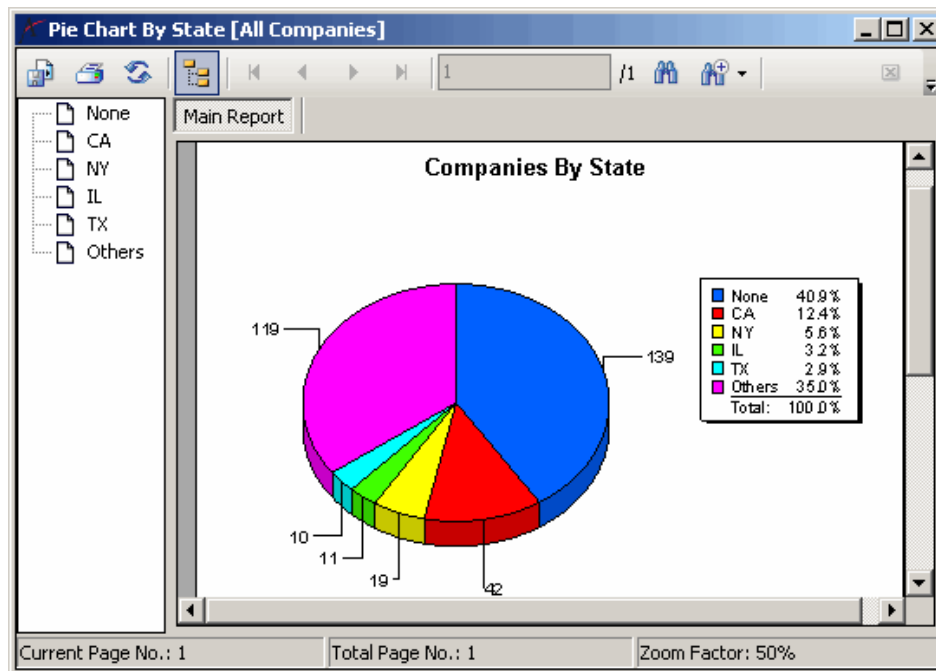
1. Open the **Companies** Service and click to open the **General Look up Views** folder.
2. Run a view such as, **All Companies**. At the top of the view, Click the **Report Wizard** icon.



- The Report Wizard launches and displays the list of reports supported by the Companies service.
3. Select the **Analysis** tab.
 4. Select the **Pie Chart by State** report. (Note that this is a Crystal Report.)



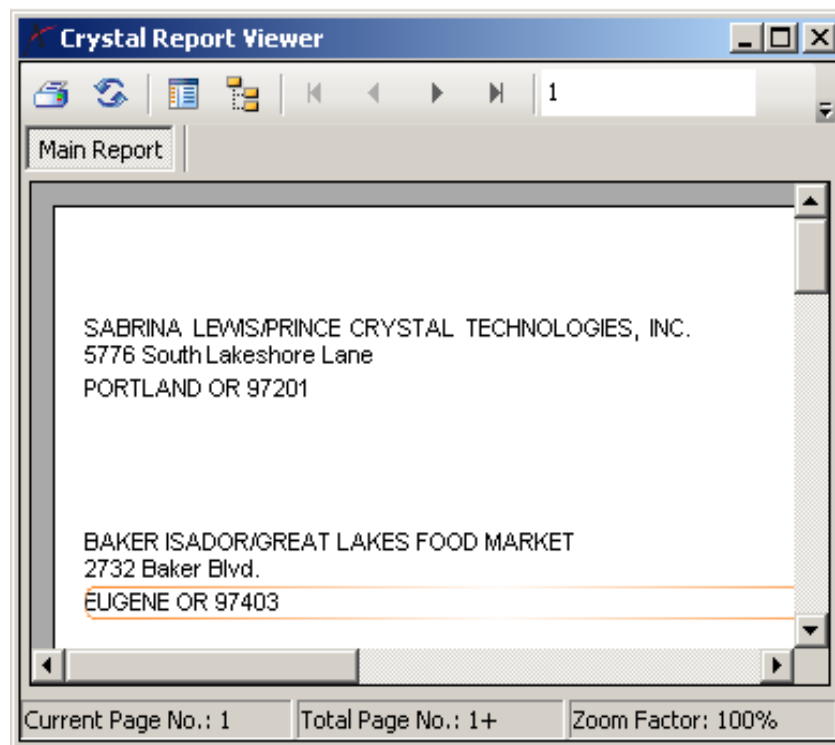
5. Click **Next**.
6. Click **Finish** to preview the report.
 - A window opens that contains the report. The company data on the class system differs from the example below but the results should look something like this:



- A user can print the report from this screen.
7. Double-click one of the California slices in the pie chart.
 - This displays the records that correspond to the pie slice.
 - Click the *grey X* in the upper right-hand corner of the view to return to the main screen of the report.
 8. Click the **X** in the upper right-hand corner of the Crystal Reports window to close the report.

Creating Mailing Labels with Crystal Reports

1. Open the **Persons in OR** view created previously.
2. Click the **Report Wizard** icon in the toolbar.
3. Select the **Labels** tab.
4. Select **Avery 5161 Label** and click **Finish**.
 - If a user had a printer with the Avery 5161 Label sheets, they could print out the labels directly from the Crystal Report window.
 - Alternatively, a user could export the report to another format by clicking the **Export** icon in the Crystal Reports toolbar (the envelope icon).



5. Close the Crystal Report.

Objective.....	6.1
Understanding Contact Logs	6.2
Creating a Contact Log from the Persons Service.....	6.3
Creating a Contact Log Record from the Employees Service.....	6.5
Creating a Quick Contact Log Record from a Persons View	6.6

Objective

In this section, users 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, users will be able to:

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

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.

Users can also **quickly record a Contact Log record from the Persons View.** If a user right clicks on a Persons record, selects Person Options, automatically either a "Left Voice Mail" or "Record Phone Call" contact will be created.

Creating a Contact Log from the Persons Service

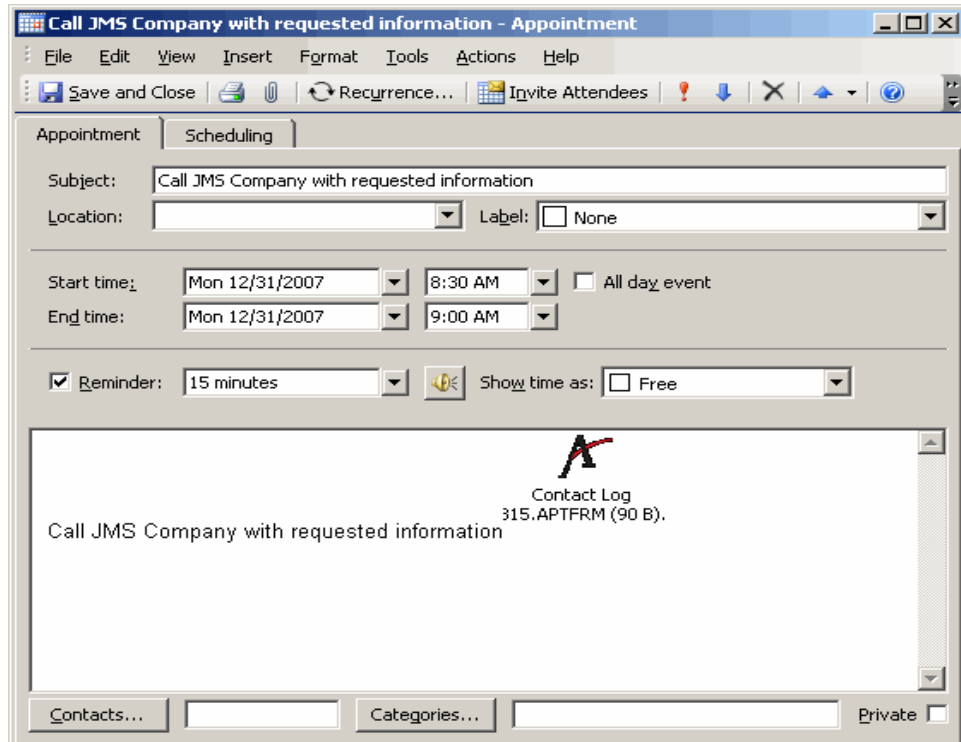
A user can create a Contact Log record from the Persons, Employees, Orders, or Contact Log service. In this exercise, a user will create a Contact Log record from a Persons record.

1. Open a **Persons** record.
2. Select the **Contact Log** tab.
3. To open a new **Contact Log** record, in the toolbar, click the **New Record** button.
 - Aptify automatically fills in the Date/Time field with the current date and time.
4. In the **Description** field, enter **XYZ Contact Log** (where *XYZ* are your initials).
5. Leave the **Type** field set to **Phone** and **Category** set to **Sales**.
6. Change the **Direction** to **Inbound** (customer initiated contact).
7. On the **Next Contact** tab, enter the last day of the current month and a time of 8:30 AM in the **Date/Time** field.
 - For example, **12/31/20xx** (xx=year) **8:30 AM** (no periods)
8. From the **Status** drop-down list, select **In-Progress**.
9. In the **Assigned To** field, enter the Persons record created previously in training.
10. In the **Forward** field, enter **Juan Carlos**.
11. In the **Reason** field, enter **Call XYZ Company with requested information**.

12. Click **Save and Close**.

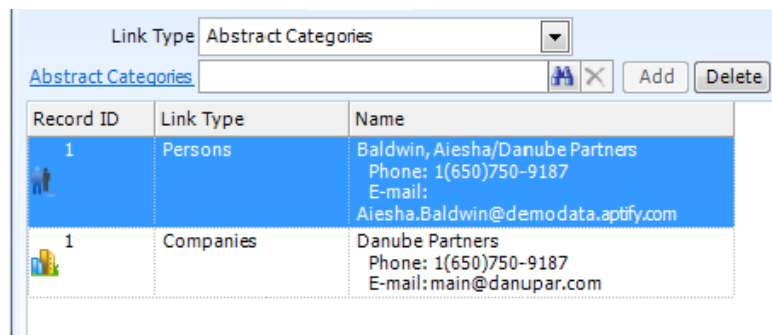
13. When a Contact Log is **created and saved**:

- Aptify auto-adds user name to the **Creator** field (After Saving & Closing).
- If Microsoft Outlook is installed on the computer, Aptify automatically creates an appointment based on the information provided within the Next Contact tab.



14. On the Contact Log record, select the **Links** tab.

- There should already be two links listed on this screen. Aptify automatically adds a link to Persons record and that person’s Companies record from which the user opened the new Contact Log record.



15. Click **Save and Close** to save and close the record.

16. Return to the **Persons** record and note that the Contact Log record now appears in the Persons record’s Contact Log (Incomplete tab).

17. Close the **Persons** record.

Creating a Contact Log Record from the Employees Service

Users can create a Contact Log record from the Persons, Employees, Orders, or Contact Log service. This exercise, will create a Contact Log record from a Employees record.

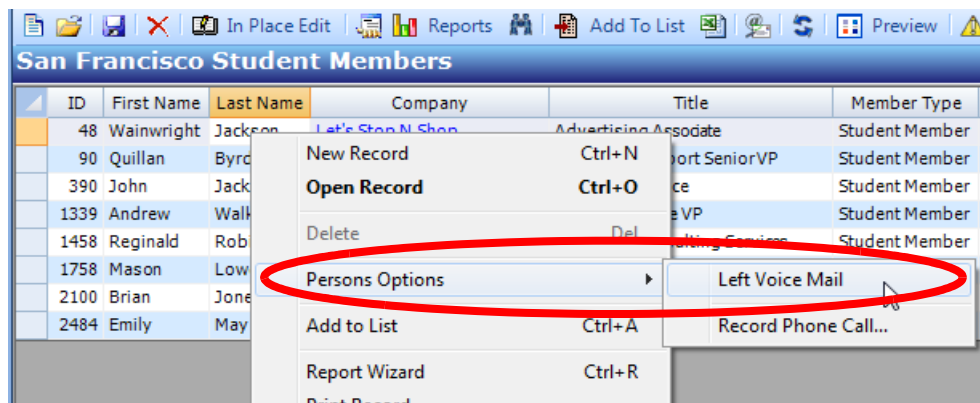
1. Open the **Employees** record that corresponds to the Aptify User Account.
 - When in class, an instructor can assist if you cannot identify which Employees record is linked to your User Account.
2. Select the **Contact Log** tab.
 - This tab should already list the Contact Log created in Exercise 1.
3. In the toolbar, click the **New Record** button to open a new Contact Log record.
4. In the **Description** field, enter **Sent introductory e-mail to XYZ Company representative**.
5. From the **Type** drop-down list, select **E-Mail**.
6. On the Next Contact tab, from the Status drop-down list, select **Complete**.
7. Click **Save**.
8. Select the **Details** tab and enter text.
 - For example, a user could paste the text of an e-mail message in this field.
9. Select the **Links** tab.
10. From the **Link Type** drop-down list, select **Persons**.
11. In the **Link** field, enter your **Persons** record and click the **Tab** key.
12. Click **Add** to add the link to the **Contact Log** record.
13. Click **Save and Close** to save changes and close the record.
14. Return to the **Employees** record and note that two **Contact Log** records now appear in the Contact Log tab.
15. Close the **Employees** record.
16. Open the **Persons** record.
17. Select the **Contact Log – Complete** tab.
 - Note that the Contact Log record created in this exercise was added to the Person's **Contact Log > Complete** tab rather than the **Contact Log > Incomplete** tab since the Contact Log's Status was set to Complete.
18. **Close** the Persons record.

IMPORTANT NOTE: As a rule, users should NOT create Contact Logs from the Contact Log service as the Contact Log will then NOT be linked to any Persons, Company, or Employee record. Users should instead create MOST contact logs from those services. Users should use the Contact Log service to create VIEWS of Contact Logs.

Creating a Quick Contact Log Record from a Persons View

Users can create a quick Contact Log record from a View of Persons. There are two process flows tied to views: **Left Voice Mail** and **Record Phone Call**. The following exercise will take users through the use of these quick contact logs.

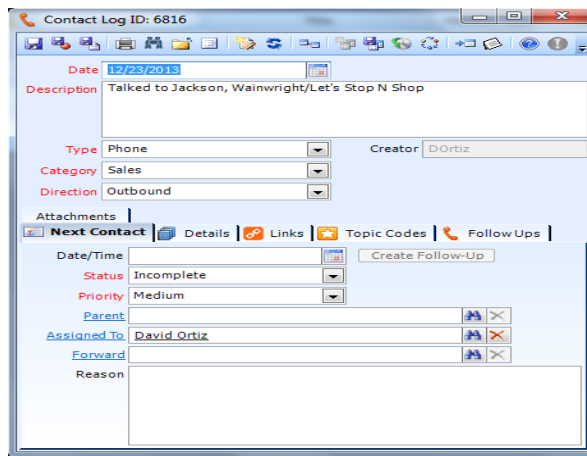
1. Run the **San Francisco Student Members** view (shortcut).
2. **Click once** on the first record in the View to select (but not open); **right click** this record.
3. Float over the **Persons Options** selection from the drop-down list.
4. Select **Left Voice Mail**.



- A **Contact Log** is automatically created under that **Persons' Contact Log tab**

5. Click to open the **Persons** record.
6. Select **Contact Log** tab to view the Contact Log format.
7. The Contact Log will be placed under the Contact Log, Select the **Complete tab**. Close the box.
8. **Right click** on the **Persons** record, **Persons Options** again. Float over the **Persons Options** selection from the drop-down list
9. This time select **Record Phone Call**.

10. The Contact Log automatically **Opens**, as it assumes the user is speaking to a person.



The screenshot shows a window titled "Contact Log ID: 6816". The window contains the following fields and controls:

- Date:** 12/23/2016
- Description:** Talked to Jackson, Wainwright/Let's Stop N Shop
- Type:** Phone (dropdown menu)
- Creator:** DOrtiz
- Category:** Sales (dropdown menu)
- Direction:** Outbound (dropdown menu)
- Attachments:** (tabbed area)
- Next Contact:** (tabbed area)
- Date/Time:** (calendar icon)
- Status:** Incomplete (dropdown menu)
- Priority:** Medium (dropdown menu)
- Parent:** (text field with a user icon and a close button)
- Assigned To:** David Ortiz (text field with a user icon and a close button)
- Forward:** (text field with a user icon and a close button)
- Reason:** (text field)
- Buttons:** "Create Follow-Up" (button)

11. Note Contact Log box to easily enter information.
12. Close box.

Case Management

Objective.....	7.1
Creating Cases	7.2
Reviewing Cases.....	7.5

Objective

Users will be able to:

- Create Cases
- Track Cases from inception to conclusion

Overview

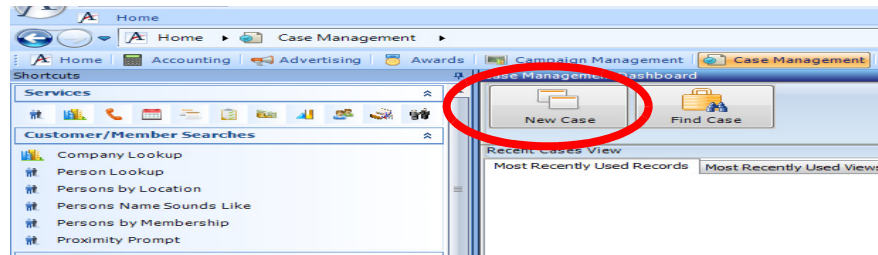
Case management is included in the Aptify CRM application to allow organizations to track their customer’s inquiries and their resolution. Individual Cases track incidents, or “tickets” as some organizations call them. This allows each customer request to be tracked, allows each request to be monitored through its individual process and supports the creation of detailed customer histories. Some examples where Case Management can be used:

- Track Initial Customer Inquiries
- IT Help Desk
- Customer Support requests and Ticketing
- Sales Inquiries

Creating Cases

Using the New Cases Wizard

1. Click the **Case Management** dashboard shortcut.
2. Click the **New Case** wizard button.



3. In the **Company** field, enter the name of **XYZ company** that submitted the case.
4. In the **Contact** field, enter the name of the person.
5. In the **Source** field, specify the source of the case as **External**.
6. In the **Date Reported** field, confirm that today's date appears.
7. In the **Recorded By** field, confirm your name (if not automatically populated).
8. For the **Case Report Method**, select phone.
9. In the **Contact Log Description** field, enter a description which will be generated automatically when this new case is created. This will tie the Contact Log to this new case.

 A screenshot of the 'New Case Wizard' form. The title is 'Welcome to the New Case Wizard'. Below the title is a brief description: 'This wizard will step you through the process of creating a new Case and any relevant Contact Log entries and workflow Tasks related to this case.' The main section is titled 'Please enter Contact Information' and contains several input fields:

- Company:** XYZ Corporation
- Contact:** Aaronson, Edward/Danube Partners
- Source:** External
- Date Recorded:** 2/17/2009
- Recorded By:** Dave O'Connell
- Case Report Method:** Phone
- Contact Log Description:** Test

 On the left side of the form, there is a sidebar with the Aptify logo and 'New Case Wizard' text. Below that, a 'Steps' section shows 'Contact Details' as the current step, with sub-steps for 'Case Details' and 'Assignment Details'. At the bottom of the form are buttons for 'Cancel', 'Back', 'Next', and 'Finish'.

10. Click the **Next** button.
11. For case **Title** enter, **XYZ Case**
12. Choose a **Category** of **Finance**.
13. Enter a **Priority** of **High**
14. Enter **Type** of **Complaint**
15. Enter a **Summary** of “**Customer was billed incorrectly**”

Aptify New Case Wizard

Please enter Case Information

Case Title: XYZ Case

Category: Finance

Priority: High

Type: Complaint

Summary: Customer was billed incorrectly.

Case Description:

Special Needs:

Steps:

- Contact Details
- ▶ **Case Details**
- Assignment Details

Buttons: Cancel, Back, Next, Finish

16. Click the **Next** button

17. For the **Primary Designee**, select an employee record. For class enter **ID #1**
18. For **Manager**, select an employee record. For class, enter **Linda Jameson**.

Aptify New Case Wizard

Please enter Assignment Information

Primary Assignee: Dave O'Connell

Manager: Linda Jameson

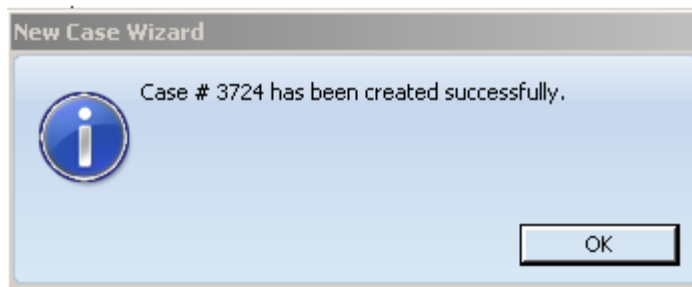
Comments:

Steps:

- Contact Details
- Case Details
- ▶ **Assignment Details**

Cancel Back Next Finish

19. Click the **Finish** button
20. Observe the success message and click the **OK** button.



Reviewing Cases

1. **Open** the case just created.
2. Click the **Status** drop-down and select **Completed**.
3. For **Date Closed**, select **today's date**.
4. For the **Closed By** employee select **ID #1**.

The screenshot shows a web application window titled "Cases ID: 3724". The main content area displays the following fields:

- Title:** XYZ Case
- Parent:** (empty)
- Status:** Reported (dropdown)
- Priority:** High (dropdown)
- Category:** Finance (dropdown)
- Type:** Complaint (dropdown)
- Company:** XYZ Corporation
- Contact:** Aaronson, Edward/Danube Partners
- Summary:** Customer was billed incorrectly.

Below the main form is a navigation bar with tabs: Satisfaction, Summary, Comments, Attachments, General (selected), Details, Assignees, Costs, Contact Log, Tasks, Sub-Cases, Related Issues, Location.

The "General" tab is active, showing the following sections:

- Timeline:**
 - Date Reported: 2/17/2009
 - Est. Start Date: (empty)
 - Date Started: 2/17/2009
 - Est. Completion Date: (empty)
 - Date Closed: 2/17/2009
- Closure:**
 - Closed By: Dave O'Connell
 - Result: (dropdown)
 - Reason: (empty)
- Assignment:**
 - Source: External
 - Reviewed By: (empty)
 - Manager: Linda Jameson
 - Type of Assignment: Not Assigned
 - Date Assigned Internal: (empty)
 - Primary Internal Assignee: Dave O'Connell
 - Primary Assignee Role: (empty)
 - Date Assigned External: (empty)
 - External Company: (empty)
 - External Contact: (empty)

5. Open the **Contact Log** tab.
6. Observe the **Contact Log** that was created using the **Wizard**.

7. Select the **Tasks** tab
8. **Open** the **Task** that was created using the Wizard.
 - Tasks can be used for the tracking of small projects
 - Users can associate Main Tasks and multiple sub-tasks. Sub-Tasks can be rolled up to track hours for a project

The screenshot shows a software window titled 'Tasks ID: 14389'. The task name is 'Case Test', type is 'General', status is 'Not Started', and priority is 'Normal'. The 'Sub-Tasks' tab is selected in the navigation bar. The 'Dates' section shows 'Assigned' as 11/7/2011. 'Assigned By' is John Samuels and 'Assigned To' is Adam Smith. The '% Complete' is 0. The 'Hours' section contains a table with columns for Estimate, Actual, and Variance.

	Estimate	Actual	Variance
Hours	0.0000	0.0000	0.0000
Rollup	0.0000	0.0000	0.0000
Total	0.0000	0.0000	0.0000

9. **Close** the **Task** record.
10. **Save** and **Close** the Case.

Objectives.....	8.1
Creating a Committees Record.....	8.2
Creating Committee Terms.....	8.3
Adding Members from a View.....	8.4
Adding Members from a Record.....	8.7
Editing Member Information.....	8.8

Objectives

In this section, users will work with the Committee Management application. When finished, a user will be able to:

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

Overview

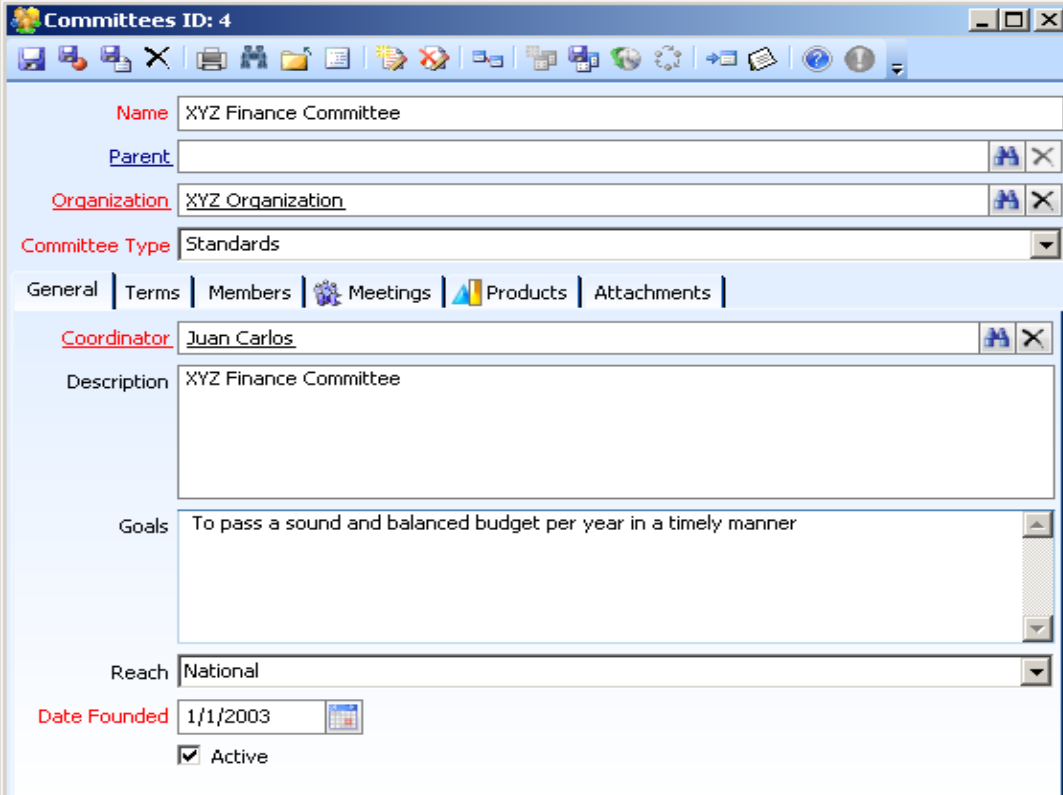
Organizations frequently assemble committees to focus on specific tasks or events. The committee may be designed to operate for one function for a short period of time, such as organizing a corporate event, or it may be a long-term project that operates indefinitely. Additionally committees may be organized into sub-committees.

Aptify’s Committee Management application provides diverse functionality to address the varying committee structures of an organization. The Committee Management application includes two services. The **Committees** service tracks the overall information about the committee and its purpose. The **Committee Terms** service tracks similar information, but the information is specific to the scope of the particular term. For instance, a committee may be designed to schedule a particular event, and its mission may be to successfully hold the event and stay within a budget. A committee term could be created to handle the tasks up until the event occurs, and then another committee term could be created to handled all the follow-up tasks. Each committee term could have its own schedule and purpose. 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 would create one Committee and one Committee Term for each Committee.

Creating a Committees Record

1. Click on the **Committee Management Application**, then **Committees Service**.
2. *Right click* the **Committees** service and select create **New Committees Record**.
3. In the **Name** field, enter **XYZ Finance Committee** (XYZ= your initials).
4. In the **Organization** field, enter an ID number of 1, click **Tab**.
5. From the **Committee Type** drop-down, select **Standards**.
6. In the **Coordinator** field, enter (number) **1**, click **Tab** to auto-fill.
7. In the **Description** field, enter **Balance Budget**.
8. In the **Goal** field, enter **Balance Budget**.
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 window titled "Committees ID: 4". The form contains the following fields and values:

- Name:** XYZ Finance Committee
- Parent:** (empty)
- Organization:** XYZ Organization
- Committee Type:** Standards
- Coordinator:** Juan Carlos
- Description:** XYZ Finance Committee
- Goals:** To pass a sound and balanced budget per year in a timely manner
- Reach:** National
- Date Founded:** 1/1/2003
- Active:**

Navigation tabs are visible: General | Terms | Members | Meetings | Products | Attachments.

11. Click **Save**.

Creating Committee Terms

The Committee Term records tracks individual terms of different committees and their info.

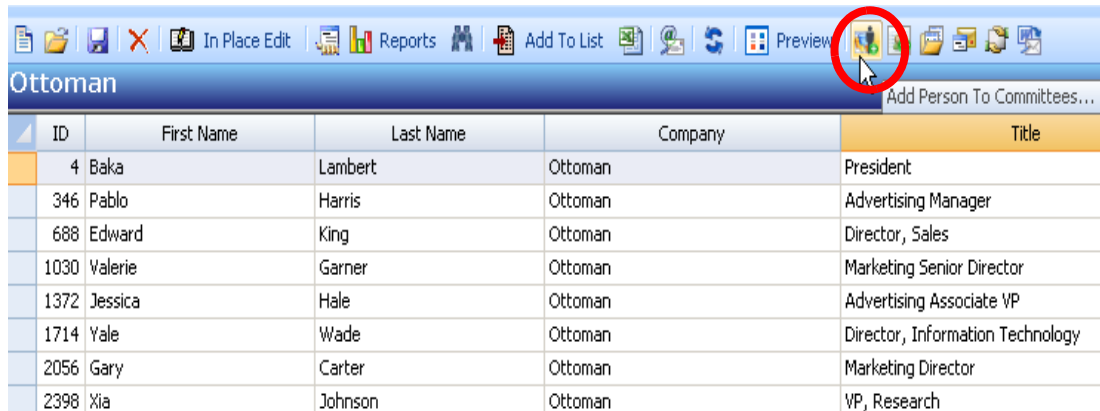
1. Select the **Terms** tab on your **Committees** record.
2. Click the **New Record** button in the toolbar.
 - A new Committee Terms record appears.
 - Aptify automatically fills in the Committee field and the Start Date.
3. In the **Name** field, enter **XYZ Finance Committee 20XX** (committee term name).
4. In the **Director** field, enter your **Persons** record **name**.
5. Enter the **Start Date** as (11 MONTHS PRIOR TO TODAY'S DATE).
6. Enter the **End Date** as (1 MONTH IN THE FUTURE FROM TODAY'S DATE).

The screenshot shows a web-based form titled "New Committee Terms Record". The form has a toolbar at the top with various icons. Below the toolbar, there are three input fields: "Name" with the value "XYZ Finance Committee 2006", "Committee" with the value "XYZ Finance Committee", and "Director" with the value "Miller, Ian/Kumpulan Guthrie Berhad". Below these fields are several tabs: "General", "Meetings", "Members", "Nominees", "Active Members", "In-Active Members", and "Attachments". The "General" tab is selected. Under the "General" tab, there are two date pickers: "Start Date" with the value "1/1/2006" and "End Date" with the value "12/31/2006". Below the date pickers are three text areas: "Term Email", "Goals", and "Accomplishments". At the bottom of the form, there is a checkbox labeled "Allow Duplicate Members" which is currently unchecked.

7. Click **Save and Close**.

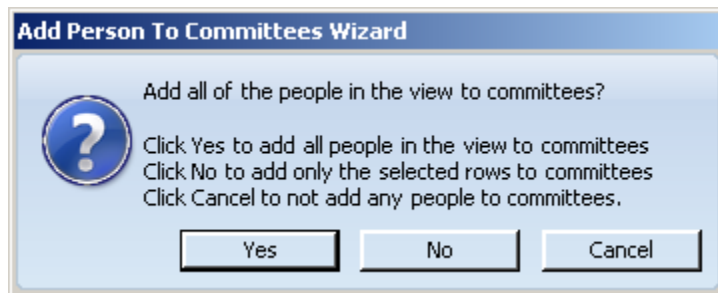
Adding Members from a View

1. Click on the **San Francisco Student Members** View shortcut.
2. Select the first **Person** in the view.
3. Click the **Add Persons to Committees...** button.



ID	First Name	Last Name	Company	Title
4	Baka	Lambert	Ottoman	President
346	Pablo	Harris	Ottoman	Advertising Manager
688	Edward	King	Ottoman	Director, Sales
1030	Valerie	Garner	Ottoman	Marketing Senior Director
1372	Jessica	Hale	Ottoman	Advertising Associate VP
1714	Yale	Wade	Ottoman	Director, Information Technology
2056	Gary	Carter	Ottoman	Marketing Director
2398	Xia	Johnson	Ottoman	VP, Research

4. Click **No** to add all Persons in the view, when prompted.



5. From the Filters options in the Select Committee Terms window, select **All Committee Terms**.
 - This displays all Committee Terms in the system regardless of their Start/End Dates.
6. Select the **Selected** checkbox for each of your *XYZ Finance* Committee terms.

Selected	ID	Committee	Term	Start Date	End Date	R#
<input type="checkbox"/>	33	Board of Directors	2007 BOD	1/1/2007	12/31/2007	
<input type="checkbox"/>	41	Furniture Standar	2007 Standards C	1/1/2007	12/31/2007	
<input checked="" type="checkbox"/>	46	XYZ Finance Comr	XYZ Finance Comr	1/1/2007	12/31/2007	
<input type="checkbox"/>	22	Audit Committee	2006 Audit Commi	1/1/2006	12/31/2006	
<input type="checkbox"/>	10	Board of Directors	2006 BOD	1/1/2006	12/31/2006	
<input type="checkbox"/>	32	Furniture Standar	2006 Standards C	1/1/2006	12/31/2006	
<input checked="" type="checkbox"/>	45	XYZ Finance Comr	XYZ Finance Comr	1/1/2006	12/31/2006	
<input type="checkbox"/>	21	Audit Committee	2005 Audit Commi	1/1/2005	12/31/2005	

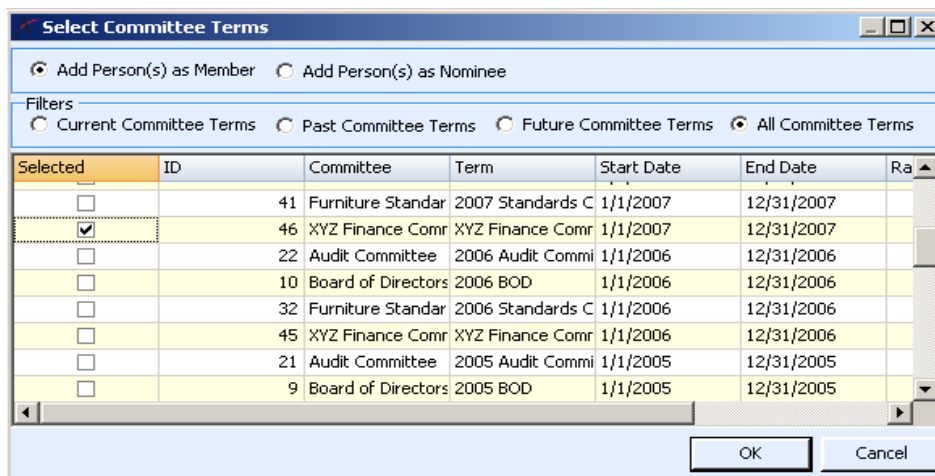
7. Click **OK**.
8. Click **Yes** to confirm the addition of the people from the view to the selected committee terms.
9. Click **OK** when prompted that the people were successfully added to the committee terms.
10. Open the **All Persons** view and sort the records by ID (if not already sorted).
11. Select the first record.
12. Hold down the **CTRL** key and select the second record.
 - Two records should now be selected.
13. Click the **Add Persons to Committees...** button.
14. When prompted, click **No** to add only the two selected Persons to committees.
15. Select **All Committee Terms** from the Filters options in the Select Committee Terms window. Re-sort the Committee Term records by ID if they are not already sorted this way.
16. Expand the box to full screen to see all fields. Place a check mark in the **Voting Member** box (far right) for your **XYZ Finance Committee 20xx** term only
17. Place a check mark in the **Selected** box for your **XYZ Finance Committee 20xx** term only.

Selected	ID	Committee	Term	Start Date	End Date	Ra
<input type="checkbox"/>	37	Audit Committee	2007 Audit Commi	1/1/2007	12/31/2007	
<input type="checkbox"/>	33	Board of Directors	2007 BOD	1/1/2007	12/31/2007	
<input type="checkbox"/>	41	Furniture Standar	2007 Standards C	1/1/2007	12/31/2007	
<input checked="" type="checkbox"/>	46	XYZ Finance Comr	XYZ Finance Comr	1/1/2007	12/31/2007	
<input type="checkbox"/>	22	Audit Committee	2006 Audit Commi	1/1/2006	12/31/2006	
<input type="checkbox"/>	10	Board of Directors	2006 BOD	1/1/2006	12/31/2006	
<input type="checkbox"/>	32	Furniture Standar	2006 Standards C	1/1/2006	12/31/2006	
<input type="checkbox"/>	45	XYZ Finance Comr	XYZ Finance Comr	1/1/2006	12/31/2006	

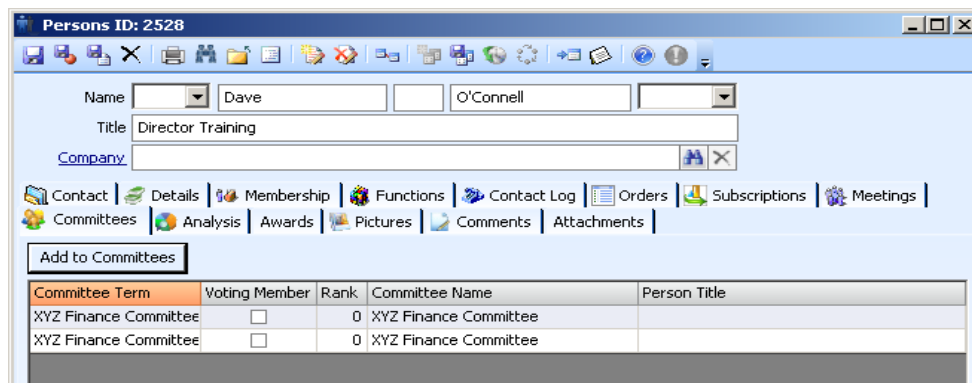
18. Click **OK**.
19. Click **Yes** to confirm the addition of two people to the selected committee terms.
20. Click **OK** when prompted that the people were successfully added to the committee terms.
21. Open the second record and select the Committees tab.
 - Note that this screen now displays the person's Committee Term.
22. Close the record.

Adding Members from a Record

1. Open the **Persons** record created at the start of the class.
2. Select the **Committees** tab.
3. Click the **Add to Committees** button.
4. From Filters options in Select Committee Terms window, select **All Committee Terms**
5. In the **Voting Member** box and the **Selected** box for your *XYZ Finance Committee* terms, place a check mark.
6. In the **Rank** column for each term, Enter **2**.



7. Click **OK**.
8. Click **Yes** to confirm the addition to the selected committee terms.
9. Click **OK** when prompted that Person was successfully added to the committee terms.
 - Committee terms should now appear Persons record's Committee tab. A user can edit or delete a Person's Committee term settings by *right clicking* on an entry.



10. Close the **Persons** record.

Editing Member Information

1. Open the previously created **XYZ Finance Committee** record.
2. Select the **Members** tab.
 - This tab displays all of the members of all of the Committee Terms. Note- those members who are in both Committee Terms are listed twice (once per term).

The screenshot shows a software interface for editing committee information. The window title is 'Committees ID: 4'. The main form contains the following fields:

- Name:** XYZ Finance Committee
- Parent:** (empty)
- Organization:** XYZ Organization
- Committee Type:** Standards

Below the form are several tabs: General, Terms, **Members** (circled in red), Meetings, Products, and Attachments. Below the tabs is a toolbar with icons for Reports, Add To List, and other functions. The main content area displays a table titled 'Members of XYZ Finance Committee - All (Page 1 of 4)'. The table has the following data:

ID	Member	Term	Rank
4	Lambert, Baka/Ottoman	XYZ Finance Committee	0
346	Harris, Pablo/Ottoman	XYZ Finance Committee	0
688	King, Edward/Ottoman	XYZ Finance Committee	0
1030	Garner, Valerie/Ottomar	XYZ Finance Committee	0
1372	Hale, Jessica/Ottoman	XYZ Finance Committee	0
1714	Wade, Yale/Ottoman	XYZ Finance Committee	0
2056	Carter, Gary/Ottoman	XYZ Finance Committee	0
2398	Johnson, Xia/Ottoman	XYZ Finance Committee	0
1	Baldwin, Aiesha/Danube	XYZ Finance Committee	0

At the bottom of the window, there is a navigation bar showing '1 of 4 pages' and '972 Records'.

3. Select the **Terms** tab.
4. To open the Committee Term record, double-click **XYZ Finance Committee 20xx**.
5. Select the **Members** tab.
6. To open the corresponding **Committee Term Members** record, double-click the first record entry.
7. In the **Rank** field, enter **1**.
8. In the **Title** field, enter **Chairman**.
9. Change the **Start Date** to **1/1/20xx** and the **End Date** to **12/31/20xx**.
10. In the **Voting Member** box, place a checkmark.

Members Record

General

Committee Term XYZ Finance Committee 2006

Member King, Edward/Ottoman

Rank 1

Title Chairman

Role

Voting Member

Region

Start Date 1/1/2006

End Date 12/31/2006

Goals

Accomplishments

Summary

OK Cancel

11. Click **OK**.

Committee Terms ID: 45

Name: XYZ Finance Committee 2006

Committee: XYZ Finance Committee

Director: Miller, Ian/Kumpulan Guthrie Berhad

General | Meetings | Members | Nominees | Active Members | **In-Active Members** | Attachments

Reports | Add To List

In-Active Members

ID	Member	Rank	Title
1030	Garner, Valerie/Ottomar	1	

12. Open the second Committee Term Members record.
13. Change the **Start Date** to **12/1/20xx**.
14. Change the **End Date** to yesterday.
15. Click **OK**.
16. Click **Save** to save these changes to the Committee Terms record.
17. Click the **In-Active Members** tab.
 - That person should now be listed as an inactive member since term has expired.
18. Select the **Nominees** tab.
19. Open a new **Committee Term Nominees** record.
20. In the **Member** field, enter **Jensen, Pamela**. (This field links to the Persons service.)
21. In the **Title** field, Enter **Secretary**.
22. In the **Rank** field, enter **3**.

Nominees Record

General

Member: Jensen, Pamela/Old World Delicatessen

Title: Secretary

Rank: 3

Summary:

23. Click **OK**.
24. **Save and Close** the Committee Terms record and then the Committees record.

Chapter 9

Products & Inventory

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Creating a Kit Product	9.17

Objective

In this lab, users 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 a Kit Product
- Creating an Inventory Location
- Creating a Product Inventory Ledger
- Creating a Product Inventory Ledger Entry

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

Publications

Meetings

Expos

Housing

Classes

Publications, Meetings, Expos, 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 Publications product type is selected, a Publications tab appears on the Products record. Additionally, extended order detail forms are defined for products with product types of Expos, Meetings, and Housing.

Product Types are configured by **administrators**.

Product Categories

Product Categories are configured by users and group similar products together. Users can create product hierarchy of categories and sub-categories. Users can also create General Ledger (GL) Accounts that flow down to new products in a category. 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 shortcuts.
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 **Books/Publications**. Click **Enter**.
 - 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.

The screenshot shows the 'New Products Record' form in Aptify. The form is titled 'New Products Record' and has a toolbar with various icons. The 'Name' field contains 'XYZ Product'. The 'Category' field contains 'Books/Publications'. The 'Type' field is a dropdown menu set to 'Publication'. The 'Parent Product' field is empty. Below the form are tabs for 'Subscription', 'Comments', 'Publications', and 'Attachments'. The 'General' tab is selected, showing fields for 'Version Number', 'Distribution Type' (set to 'Hard Shipment'), 'Top Level Item' (checked), 'Currently Sold' (checked), 'Available On' (calendar icon), 'Available Until' (calendar icon), and a large 'Description' text area.

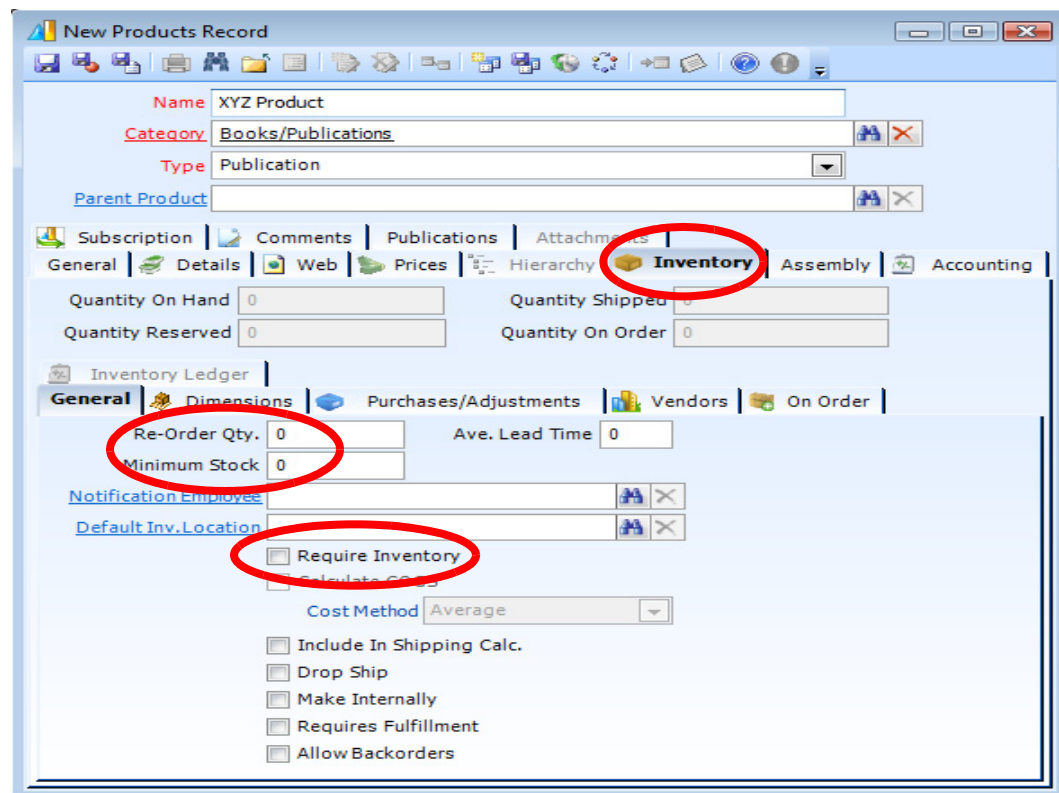
5. Click **Save**.

GL Accounts Tab

1. Select the **Accounting > GL Accounts** tab.
 - Notice how six GL Accounts are listed. These accounts flowed down from the Product Category.

Inventory Tab

1. Select the **Inventory** tab.
2. In the **Require Inventory** box, place a checkmark.



The screenshot shows the 'New Products Record' window with the 'Inventory' tab selected. The 'Name' field is 'XYZ Product', 'Category' is 'Books/Publications', and 'Type' is 'Publication'. The 'Inventory' tab is highlighted with a red circle. Below the tab, the 'Re-Order Qty.' and 'Minimum Stock' fields are both set to '0' and circled in red. The 'Require Inventory' checkbox is checked and circled in red. Other fields include 'Quantity On Hand', 'Quantity Shipped', 'Quantity Reserved', 'Quantity On Order', 'Ave. Lead Time', 'Notification Employee', 'Default Inv. Location', 'Cost Method' (set to 'Average'), and several unchecked checkboxes: 'Include In Shipping Calc.', 'Drop Ship', 'Make Internally', 'Requires Fulfillment', and 'Allow Backorders'.

3. In the **Re-Order Qty** field, enter **100**.
4. In the **Minimum Stock** field, enter **500**.
5. Click **Save**.

Understanding Pricing

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

- **Group Discounts**

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

- Can **Combine** multiple pricing features

For example, an early bird special for members only

- Support for prices in **Multiple Currencies**

The Order Entry System automatically selects the correct price based on membership, 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. (In other words, 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 (keep in mind that 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.

Organization Pricing

The screenshot shows the 'Organizations ID: 1' form. The 'Name' field is 'Sampco Holdings, Inc.'. Below the form, there is a section for 'Order Entry Permissions' which is circled in red. This section contains four checkboxes: 'Allow Price Override', 'Allow Price Selection', 'Allow Free', and 'Allow Related Product Prompt Close'. All checkboxes are currently unchecked.

Employee Pricing

The screenshot shows the 'Employee Pricing' form for 'Juan Carlos'. The 'Organization' is 'Sampco Association' and the 'Supervisor' is 'John Samuels'. Below the form, there is a section for 'Order Entry Permissions' which is circled in red. This section contains three checkboxes: 'Allow Price Override', 'Allow Price Selection', and 'Allow Free'. All checkboxes are currently unchecked.

Product Pricing

The screenshot shows the 'Product Pricing' form for 'Sampco 10-Gallon Hat'. The 'Category' is 'Hats/Accessories' and the 'Type' is 'General'. Below the form, there is a section for 'Order Entry Permissions' which is circled in red. This section contains three checkboxes: 'Allow Free', 'Allow Price Override', and 'Allow Price Selection'. All checkboxes are currently unchecked.

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** tab.
2. From the sub-type area, open a new **Prices** record.
 - To do this, on the sub-type toolbar, click the **New Record...** button or right-click in the gray area and select **New** from the pop-up list.
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
- Member Type:** Member
- Type:** Base Price
- % of Base:** 0
- Start Date:** (empty)
- End Date:** (empty)
- Minimum Quantity:** 0
- Maximum Quantity:** 0
- Pricing Rule:** (empty)
- Description:** (empty)

Buttons at the bottom: OK and New, OK, Cancel.

7. Click the **OK and New** button.

8. Note on the Product record in background, the **Member Price** record appears in the **Prices** tab.

Name	Price	Includes Tax	Member Type	Start Date	End Date	% of Base	Minimum Quantity
Member	100.00	<input type="checkbox"/>	Member			0	

9. In the **Name** field, enter **Non-Member**.
10. In the **Price** field, enter **\$0.00**.
11. From the **Member Type** drop-down list, select **Non-Member** (if not already selected).
12. From the **Type** drop-down list, select **% of Base Price**.
13. In the **% of Base** field, enter **200**.

Name	Price	Includes Tax	Member Type	Start Date	End Date	% of Base	Minimum Q
Member	100.00	<input type="checkbox"/>	Member			0	
Non-Member	200.00	<input type="checkbox"/>	Non-Member			200	

14. Click **OK**. Click **Save**.
- 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.

Important Note: **Filter Rules** is an available and valuable tab under a **Prices** record. **Filter Rule** records can be set up to cross reference specific areas/services to set a particular price. For instance, a user could tie a discount to the amount of **Continuing Education Credits** a **Bill To Persons** has or to the number of **Classes** they have taken in a particular year.

Creating a Related Product Prompt

A Related Product is considered to be an additional product that can be seen as an accessory or a cross-sell product. The related product will appear next to the Order form, as a separate window when a user places an order.

For example, if an organization is selling a subscription for magazines, the related product may be a travel bag at a discounted price.

1. From the *XYZ Product* record, select the **Details** tab.
2. Select the **Related Products** sub-tab.
3. Open a new **Related Products** record.
4. In the **Related Product** hyperlink field, enter **Financial Planning**.
5. In the **Product Relationship Type** field, enter **Accessory**.
6. In the **Start Date** field, enter **today's date**.
7. In the **Prompt Text** field, enter the **Financial Planning Available**.
8. In the **Web Prompt** field, enter the **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:** 2/10/2009
- End Date:** (empty)
- Auto Prompt Operator:**
- Prompt Text:** Financial Planning is an accessory to XYZ Product, and it is available for only \$10. Ask the member if he/she is interested in purchasing the product today.
- Web Prompt:**
- Web Prompt Text:** (empty)

Buttons: OK, Cancel

9. Click **OK**.
 - When a user takes an order for *XYZ Product* later in this class, a pop-up dialog box will appear to inform them that there are related products available.
10. **Save** and **Close** the *XYZ Product* record.

Inventory Objectives

Because users checked the **Require Inventory** button under the **Products, Inventory** tab, they will have to set up and understand:

- Creating an Inventory Location
- 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 stored in multiple warehouses and transferred between as necessary
- Inventory records configured by the organization's Accounting department

3 Services related to Inventory Management:

Inventory Locations (ILs)

- Inventory Location must be identified first. For physical products, the location is a bin or pallet location in the warehouse.
- For meetings, it would be a block of seats available in the meeting room.

Product Inventory Ledger (PILs)

- Product Inventory Ledgers must be created next. Each Inventory Location will have a ledger for each product it contains. These Ledgers are used to house 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)

- Inventory transactions – 4 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
- Use an Adjustment PILE to make corrections if necessary

Creating an Inventory Location

1. Return to the **Product Maintenance** Application.
2. On the dashboard, click the **New Inventory Location** button.
3. In the **Name** field, enter **XYZ Warehouse**.
4. In the **Description** field, enter **Contains XYZ products**.
5. In the **Organization** field, enter **1**.
6. Leave **Type** set to **Bin** and **Status** set to **Active**.
7. In the **Max Units** field, enter **5000**.
8. In the **Replenish Level** field, enter **500**.
9. In the **Replenish Quantity** field, enter **500**.
10. In the **Manager** field, enter **John Samuels** (this links to the Employees service).
11. Click **Save**.

New Inventory Locations Record

Attachments | **General** | Product Inventory Ledger | Products | Inventory Locations

Name XYZ Warehouse

Description

Organization XYZ Organization

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

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 a user tracks inventory must have a Product Inventory Ledger assigned to it.

1. Select the **Product Inventory Ledger** tab on the **Inventory Locations** record created previously.
2. Click the **New** button in the toolbar to open a new **Product Inventory Ledger** record.
 - Aptify fills in the Inventory Location field automatically since the user opened this record from an Inventory Location record. A user can also open new Product Inventory Ledger records directly from the Product Inventory Ledger service.
3. In the **Product** field, enter **XYZ Product**.

The screenshot displays a web application window titled "Product Inventory Ledger ID: 355". The window contains a form with the following fields and sections:

- Product:** A text input field containing "XYZ Product".
- Inventory Location:** A text input field containing "XYZ Organization/XYZ Warehouse".
- Comments:** A large empty text area.
- Attachments:** A section with a plus icon and a minus icon.
- Product Inventory Ledger Details:** A section with a plus icon and a minus icon.
- Product Inventory Ledger Entries:** A section with a plus icon and a minus icon, which is currently active.

Under the "Product Inventory Ledger Entries" section, there are five input fields, each with a value of "0":

- Quantity On Hand: 0
- Quantity Available: 0
- Quantity Reserved: 0
- Quantity Shipped: 0
- Quantity Balance: 0

4. Click **Save**.
 - Note that the Product Inventory Ledger Entries tab is now active.

Creating a Product Inventory Ledger Entry

Users will utilize 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** tab.
2. Click the **New Record** button and open a new **Product Inventory Ledger Entries** record.
 - Aptify fills in the Product Inv. Ledger field automatically since a user opened this record from a Product Inventory Ledger record. A user can also open new Product Inventory Ledger Entries records directly from the Product Inventory Ledger Entries service.
3. In the **Description** field, enter **Add 1000 units**.
4. In the **Quantity** field, enter **1000**.
5. In the **Unit Cost** field, enter **\$20.00**.

The screenshot shows a web-based form for creating a new Product Inventory Ledger Entry. The form is titled "New Product Inventory Ledger Entries Record" and has a toolbar with various icons. The main content area has two tabs: "Product Inventory Ledger Entry Transactions" and "Attachments". The "General" tab is selected, and the sub-tab is "Product Inventory Ledger Entries". The form fields are as follows:

Product Inv. Ledger	XYZ Product-XYZ Warehouse		
Original PILE			
Description	Add 1000 Units		
Date	10/31/2011		
Type	Purchase		
Quantity	1000		
Unit Cost	\$20.00		
Currency Type	US Dollar		
Quantity Balance	0		
Entry Qty. Balance	0		

6. Click **Save**.
7. Click **Close**.
8. Note the **Product Inventory Ledger** record, then **Save and Close**.
9. Refresh, then **Save and Close** the **Inventory Locations** record.
10. Open the **XYZ Product** record (dashboard, Find Product).
 - A user can access the Products service and their custom views from either the Inventory Management or the Product Setup and Maintenance application.
11. Open the record, then select the **Inventory** tab.

12. Notice that the **Quantity On Hand** field reads **1000**.

The screenshot displays a product configuration window for 'XYZ Product'. The 'Inventory' tab is active, showing the following data:

Quantity On Hand	1000.0000	Quantity Shipped	0.0000
Quantity Reserved	0.0000	Quantity On Order	0.0000

Below the inventory data, the 'General' sub-tab is selected, showing various settings:

- Re-Order Qty.: 0.0000
- Ave. Lead Time: 0
- Minimum Stock: 0
- 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

General and Prerequisites Subtabs

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

General Tab

The **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. Select the **Details** tab.
2. The record should default to the **General** subtab.
3. Check the **Open Order Line on Add** checkbox.
 - Checking this box automatically opens up the Order Line on an Order form when the product is added.
 - Useful feature when additional information is required on an order such as additional shipping info, booth info for an expos sale, registrant info for a class, etc.
4. Check the **Allow Description Override** checkbox.
 - 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.

The screenshot displays a software interface for product configuration. At the top, there are several tabs: Accounting, Subscription, Comments, Attachments, General, Details, Web, Prices, Hierarchy, Inventory, and Assembly. The 'Details' tab is selected, and within it, the 'General' subtab is also selected. Below the tabs, there are various fields and options. The 'Organization' field is set to 'Sampco Association', 'Committee' is empty, 'Prev. Version' is empty, and 'Base Product' is 'Sampco Baseball Hat'. The 'Chapter Assignment Rule' is empty. The 'Order Line Description' field is empty. At the bottom, there are two checkboxes: 'Open Order Line on Add' and 'Allow Description Override', both of which are checked. Red circles highlight the 'Details' and 'General' tabs, and the two checked checkboxes.

Prerequisites Tab

The **Prerequisites** enables users to set up prerequisites for a product. Clients will only be able to order a product if they meet the prerequisites set up under this tab.

1. Select the **Prerequisites** subtab.
2. Check the **Require Prerequisites** checkbox.
3. Observe the **Prerequisites Failure Message** and the **Web Prerequisites Failure Message** linked fields.
 - 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 on the **Prerequisites Failure Message** link to open a blank record.
5. In the **Name** and **Base String** fields, enter **Purchasee 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**.
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.

The screenshot shows the 'Prerequisites' subtab selected. The 'Require Prerequisites' checkbox is checked. The 'Prerequisites Failure Message' field contains the text 'Purchasee must be from State of Massachusetts to purchase.' The 'Web Prerequisites Failure Message' field is empty. Below, a 'Filter Rules' table is visible with the following data:

Filter Rules				
#	Service	Field	Operator	Value
1	Bill To Person	State	Exactly Matches	MA
*				

Creating a Kit Product

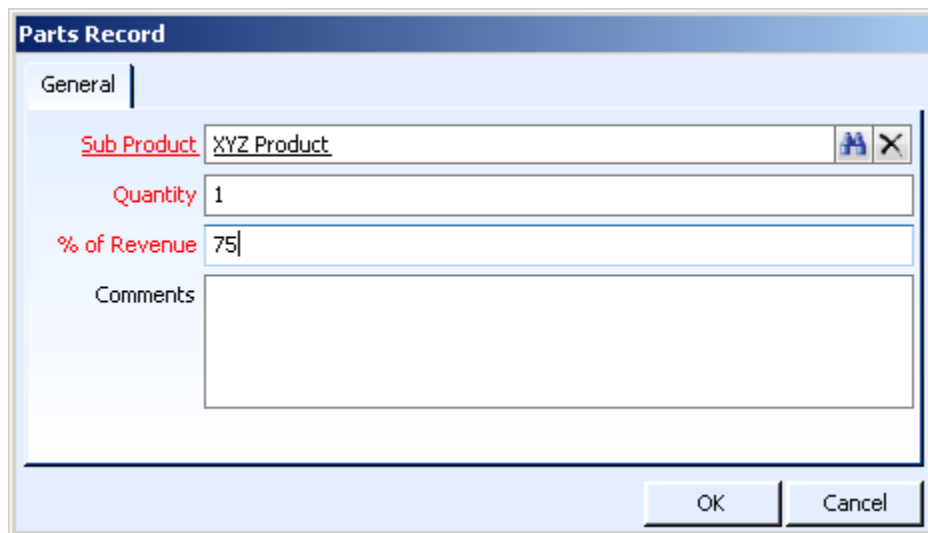
Kits are products that contain **two or more products** and are sold as a bundle.

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** (where *XYZ* are your initials).
4. In the **Category** field, enter **Books/Publications**.
 - The **Product Type ID** should be set to **Publications**.
5. Click **Save**.

Assembly Tab

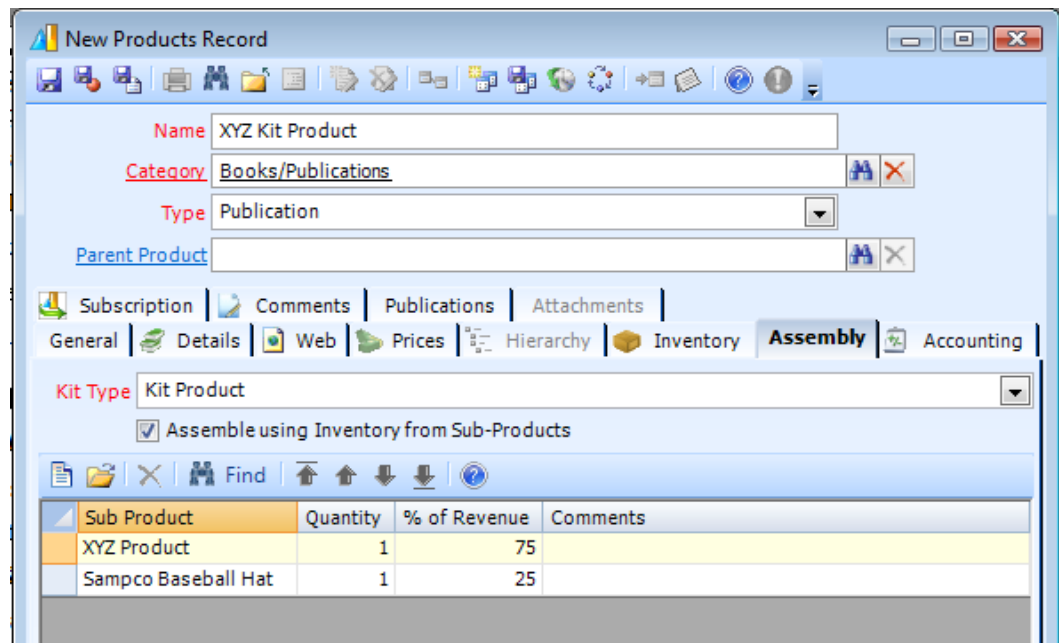
1. Select the **Assembly** tab.
2. From the **Kit Type** drop-down list (red), select the **Kit Product** type.
3. Click the **Assembly Using Inventory From Sub-Products** checkbox.
 - Notice that the Assembly functionality is now active.
4. In the toolbar, click on the **New record** icon to open a new **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**.



The screenshot shows a 'Parts Record' dialog box with a 'General' tab. The 'Sub Product' field is populated with 'XYZ Product'. The 'Quantity' field contains the value '1'. The '% of Revenue' field contains the value '75'. There is a large empty text area for 'Comments'. At the bottom right, there are 'OK' and 'Cancel' buttons.

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**.
12. In the **% of Revenue** field, enter **25**.
13. Click **OK**.



14. Click **Save**.

Prices Tab

1. Select the **Prices** tab.
2. Click the **New Record** button.
3. Add a **Member** Price of **\$105** for each kit.
4. Click the **OK and New** button.
5. Add a **Non-Member** Price of **\$210** for each kit. Mark this price as the default.
6. Click **Save and Close**.

Product Grouping

- Easy way to add multiple products to an order in one operation
- Setup like a Kit product
- 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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Creating a Multi-Line Order.....	10.7
Creating a Quotation.....	10.9
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Marking Orders As Shipped.....	10.16
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Objective

Within Aptify, once 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

Types of Orders

The Aptify Order Entry system enables organizations to process any type of transaction within one module. A single order can combine different types of transactions. For example, a service representative could process a new membership, register that individual for a meeting, and sell a book all in one transaction with one invoice.

In Aptify, all income-generating items are classified as products, including booth space at expos, meeting registrations, subscriptions and membership dues. Aptify has developed a sophisticated method of tracking the extended information associated with these complex transactions within the Product Service/Order Entry system. Unlike some generic products that encourage workarounds to handle these types of transactions through a centralized Order Entry system, Aptify was designed to handle all transactions.

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

- **Orders can be placed for multiple and diverse products on the same invoice.**
- Orders and Payments records **automatically pull address information** from customer records for shipping and billing addresses 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.
- 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. To accommodate this, **Aptify has a deferred income option** that can automatically generate scheduled transactions over a given time period to recognize the income as it is earned.
- 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

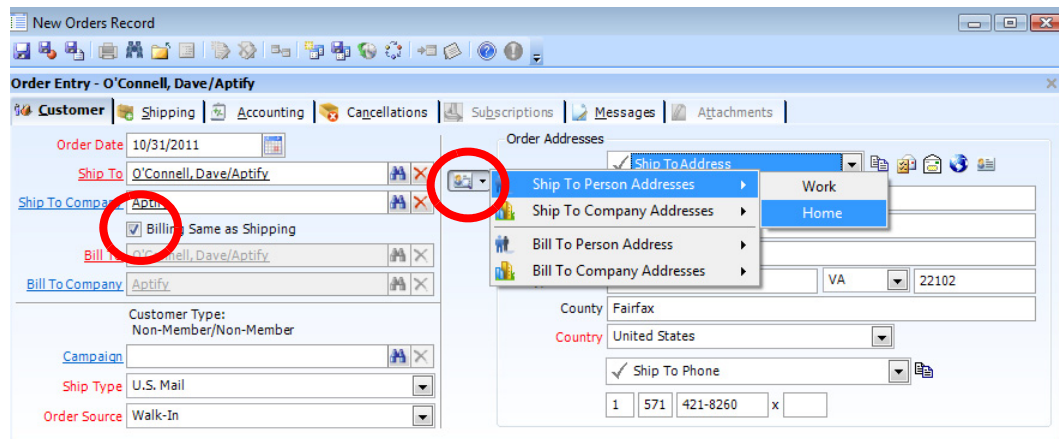
This section gives users the hands-on knowledge and experience of ordering a product and viewing the decrease in inventory. **Normally, Orders would be done using a user's companies E-Business web site OR by using a wizard** - see the next exercise. An Order would **NOT** normally be created by using a Persons record - users are doing so in this exercise to see features - such as advanced addressing - that would not be accessible via the web site/wizard.

1. Open the **Persons** record.
2. Select the **Orders** tab.
3. In the toolbar, click the **New Record** button to open a new orders record.
 - New **Orders** record displays: Aptify automatically fills in fields, including:
 - The **Ship To** information (Name, Company, Address, etc.) since the form was opened from a Persons record.
 - The **Date** field with today's date.

The screenshot shows the 'New Orders Record' form in Aptify. The form is titled 'Order Entry - O'Connell, Dave/Aptify'. It has tabs for Customer, Shipping, Accounting, and Cancellations. The 'Customer' tab is active. The form contains fields for Order Date (10/31/2011), Ship To (O'Connell, Dave/Aptify), Ship To Company (Aptify), Billing Same as Shipping (checked), Bill To (O'Connell, Dave/Aptify), Bill To Company (Aptify), Campaign, and Ship Type (U.S. Mail). The 'Order Addresses' section on the right shows 'Ship To Address' checked and 'Ship To Phone' checked. The address is 25 Forest Avenue, Fairfax, Fairfax, United States.

- Note that the same address information that was added to the Ship To section is also added to the Bill To section. To specify different Bill To information,
4. Remove the check mark from the Billing Same As Shipping box.

5. To the right of the **Ship To** field, click the **Addresses** button (record center).
 - This button is circled in the following figure.
 - Clicking this button displays a drop-down list that contains all of the addresses associated with the Person and the Company (including the addresses found on the Addresses tab).
6. Select **Ship To Person Addresses** > to use the address added to the record's Addresses tab in the previous *Companies & Persons* exercise.
7. Of the choices, select **Home**.
 - **Note:** Ship To address information changes to the Home address.



8. From the **Billing Same as Shipping** box, remove the check mark.
9. In the **Bill To** field, the person and Bill To Company then populates automatically.
10. On the right side of the order, under **Order Addresses**, use the address drop-down list to switch from the Ship To Address to the Bill to Address. Note that the **Bill To Address** still uses the original address (note when toggling between the **Ship To Address** and **Bill To Address** using the address drop-down list).
11. Next to the Ship To field, click the **Addresses** button, and from the pop-up list, select **Person** > **Vacation Address**.
 - The Bill To address is updated to use the vacation address entered previously.
12. From the drop-down list items, click between the **Bill To** and the **Ship To**.
 - Notice that there are now specified different Bill To and Ship To addresses.
13. In the **Find Products** field, Enter your **XYZ Product**, and click the **Tab** key.
14. In the **Quantity** field, Enter **1**.
15. Click the **Add** button (right of Quantity).
 - An Order line is added to the form for 1 unit of the **XYZ Product**.

Line	Type	Product ID	Product	Description	Quantity	Price	Discount	Extended
1	9922	9922	XYZ Product		1	\$200.00	0	\$200.00

16. To delete an order: Highlight Order Line 1 (as shown in Figure 10.3) and click the **Delete** key. Click **Yes** to confirm the deletion of the order line.
17. In the **Find Products** field, enter **XYZ Product** and click the **Tab** key.
18. In the **Quantity** field, enter **2** and click **Add**, which initiates the actual order.
 - An order line for 2 units is added to the Order at \$200 each for a total of \$400.
 - The related product prompt appears to the right of the form.
19. In the **Price** field, click the **200.00** to display an ellipsis (...) button.
20. Click the ellipsis button and review the available prices for this product.
 - Note that this person is charged \$200 since this person's Member Type is Non-Member. The Member Type is also reported below the Order Level field on the Order form. It should read **Non-Member**.
21. From the drop-down list, select **100** (the member price).
22. When prompted if a user is overriding the automatic price, click **Yes**.
 - The price updates to \$100/unit and the Order Total changes to \$200.

Line	Type	Product ID	Product	Description	Quantity	Price	Discount	Extended
1	9922	9922	XYZ Product		1	\$200.00	0	\$200.00

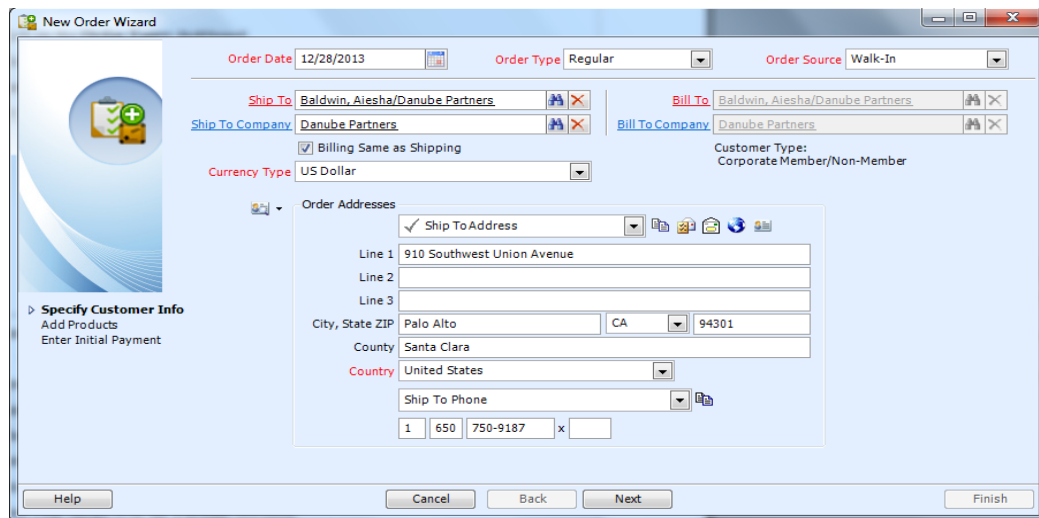
23. Select the **Payment Type** drop-down.

24. From the **Pay Type** drop-down list, select **Visa**.
25. In the **CC Account #** field, enter **4123 4567 8901 2345** (any 16 digits beginning with 4).
26. In the **CC Exp. Date** field, enter a date **two years from today's date**.
Note: On the training server, users can enter any value in the Acct # field since it is not configured to validate credit card numbers through Paypal. On a Live system, users would only use valid credit card numbers provided by a customer/member.
27. Check the **Save for Future Use** checkbox (towards bottom right); this enables users to reuse the CC on subsequent orders for this Person without having to re-type.
Note: This function must be enabled per payment type under the Order Entry Administration application, Saved Payment Types service.
28. Click the **Save** button.
29. The system prompts users that this order can be shipped because all of the products on the order have:
 - The **Requires Fulfillment** box cleared (this box is on the product form's Inventory tab)
 - The product has available inventory (**Requires Inventory** box is checked and this product is stocked in the warehouse).
30. On the order prompt screen asking if the user wants to have the item shipped, click **No**. (Later, in another exercise, this order will be manually shipped).
31. Close the **Orders** record.

Creating a Multi-Line Order

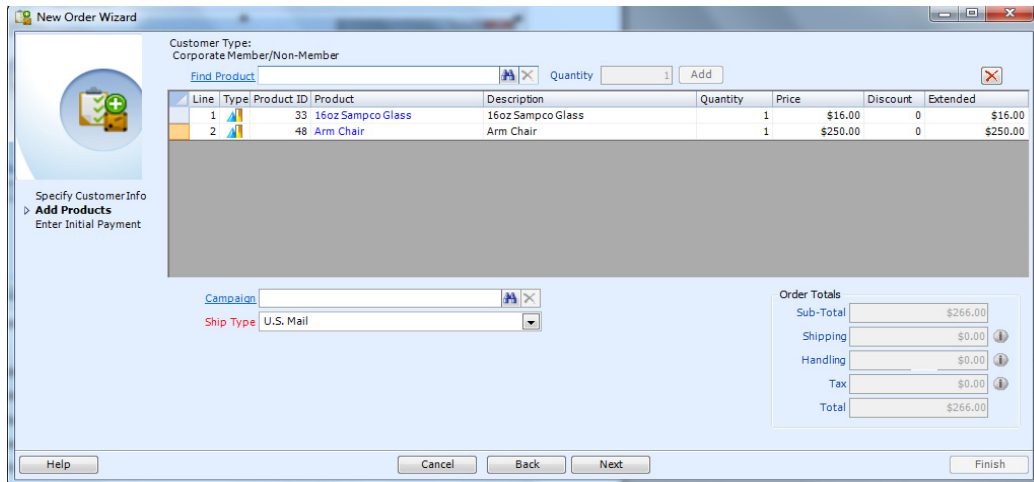
In this exercise users will enter an Order using the **New Order Wizard**. The New Order Wizard should be the standard method for end users to enter a customer request handled over the phone or in person. It is the quickest/most efficient way to handle a standard order. It is important to note that ANY 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. Click on the **Order Entry** application to open the dashboard.
2. Click on the **New Order Wizard** button.
3. In the **Ship To** field, enter your **Persons** name and click **Tab**.
4. Click the **Next** button.



5. In the **Find Product** box, enter **16** and click **Tab**.
6. Click the **Add** button.
 - The system will add the 16 oz. shot glass to your order.
7. In the **Find Product** box, Enter **Arm** and click the **Tab** key (arm chair fills in).
8. Click the **Add** button.
 - The system will add the Arm Chair product to your order.

9. Click the **Next** button.



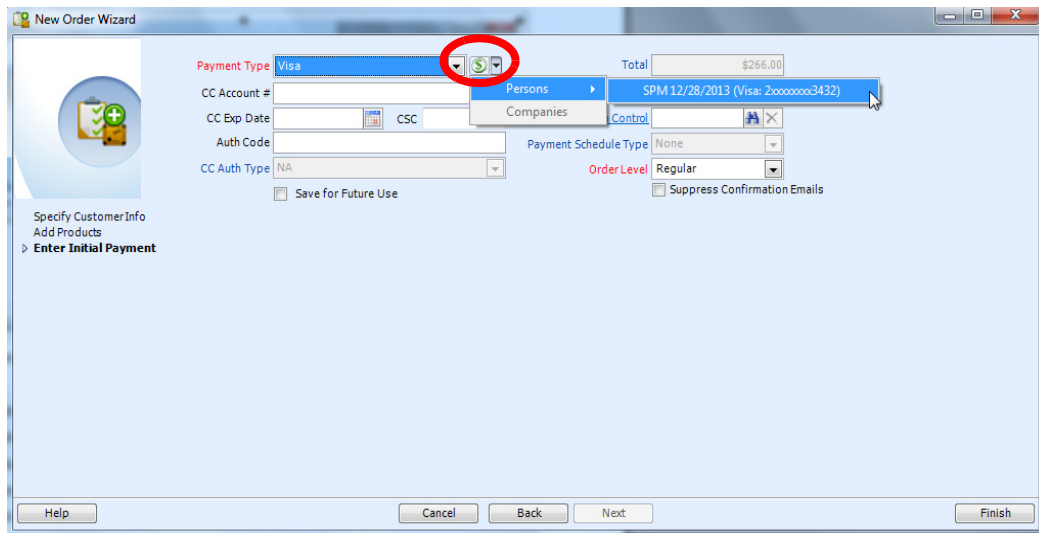
10. Select the **Saved Payments** icon next to the **Payments Type** drop-down.

11. Float the cursor over the **Persons** selection.

12. Click to select the **Credit Card** information that displays to the right. Note the information autofills.

13. Click **Finish** to place the order.

- Note that a user is not prompted that this order qualifies for auto-shipment since both products have the Requires Fulfillment box checked on their respective Products records.



14. Click **Yes** to create another **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. From the **Order Type** drop-down list, select **Quotation**. Change **Order Source** to **Phone**.

The screenshot shows the 'New Order Wizard' interface. The 'Order Date' is set to 12/30/2013. The 'Order Type' dropdown is set to 'Quotation'. The 'Ship To' field is populated with 'Baldwin, Aiesha/Danube Partners'. A red circle highlights the 'Order Type' dropdown menu, which is currently set to 'Quotation'.

2. In the **Ship To** field, enter the persons name. Click **Tab** to auto-fill. Click the **Next** button
3. To the **Order Line**, add your **XYZ Product**.
4. Click the **Next** button. Click **Finish** - quotations do **not** require payment information.
5. Click **No** to create another Order.
6. Click on the **My Orders Today** shortcut (Under the **Orders Shortcut** Group).

The screenshot shows the 'Orders' view with a table of quotations for Dave O'Connell. The table has columns for ID, Order Date, Line1_ProductName, Grand Total, Balance, and Order Status. A single row is visible with ID 9863, Order Date 10/31/2011, Line1_ProductName XYZ Product, Grand Total \$200.00, Balance \$200.00, and Order Status Taken.

ID	Order Date	Line1_ProductName	Grand Total	Balance	Order Status
9863	10/31/2011	XYZ Product	\$200.00	\$200.00	Taken

7. Double-click on the **Quotation** entry created above to open the **Orders** record.
8. Change the **Order Type** from **Quotation** to **Regular**.
9. Select the **Saved Payments** icon next to the **Payments Type** drop-down.
10. Float the cursor over the **Persons** selection.
11. Select the **Credit Card** information that displays to the right.
12. Click **Save**.
13. Change the **Order Status** from **Taken** to **Shipped**.
14. Click **Yes** to indicate that all items in the order have been shipped.
15. Click **Save and Close**.
16. Click the **Refresh** button on the **My Orders Today** view.
17. The **Quotation** is changed to a **Regular** Order.

Ordering a Product w/Related Product Prompt

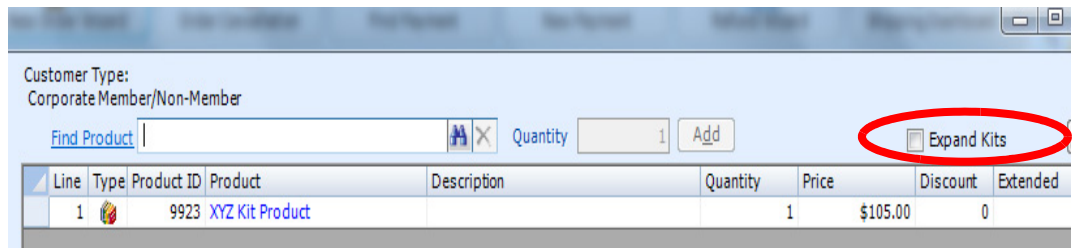
1. Click on the **New Order Wizard** (Order Entry Dashboard).
2. In the Ship To's **Name** field, enter **1** and click the **Tab** key.
 - Information from the Aiesha Baldwin record (who is Person ID 1) automatically populates the Name, Company, and Address field on the Ship To and Bill To sections.
3. Click **Next**.
4. Create an order line for the **XYZ Product**. User should try to do this on their own. Otherwise, follow these steps:
 - In the **Find Product** field, enter **XYZ Product** and click the **Tab** key.
 - In the **Quantity** field, enter **1**.
 - Click the **Add** button.
5. Notice that the **Related Product Prompt** configured in the previous exercise now appears to the right of the Wizard. Drag the prompt to the center of the screen.

Related Products: XYZ Product (3504)				
	Product	Product	Relationship Type	Comments
+	4	Financial Planning	Accessory	Financial Planning is an accessory to XYZ Product, and it is available for only \$10. Ask the member if he/she is interested in purchasing the product today.

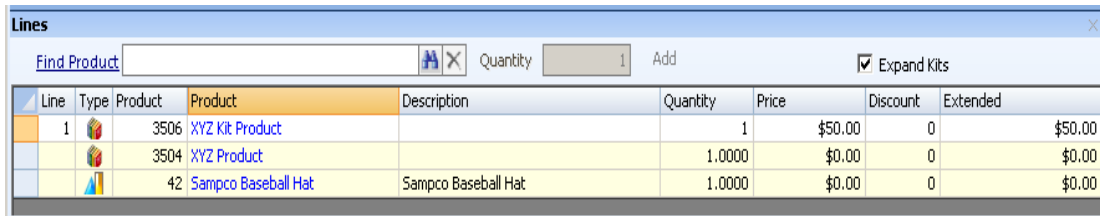
- Users may receive an error message if attempting to close the Related Product Prompt. An **Allow Related Product Prompt Close** option on the Employees form's Details tab can be enabled in order to allow users to close this pop-up.
6. Double-click the plus (+) sign in the column on the far left of the dialog to automatically add one unit of the Financial Planning product to the order.
 7. Click the **Next** button.
 8. Next to the **Payments Type** drop-down, select the **Saved Payments** icon.
 9. Float the cursor over the **Persons** selection.
 10. Select the **Credit Card** information that displays to the right.
 11. Click **Finish**.
 12. Click **OK**.
 13. Click **Yes** to create another **Order**.

Ordering a Kit Product

1. Enter your **Persons** info for the address info.
2. Click the **Next** button.
3. Create an order line for 1 unit of your **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 on the **Expand** checkbox to see the components.



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

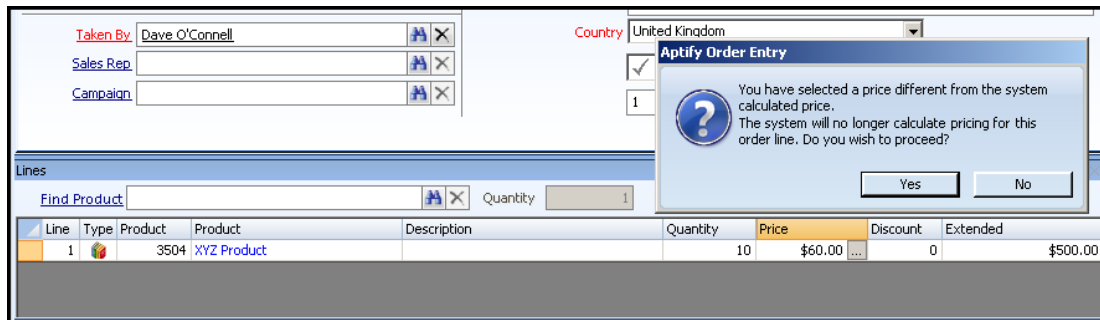


6. Click the **Next** button.
7. Next to the **Payments Type** drop-down, select the **Saved Payments** icon.
8. Float the cursor over the **Persons** selection.
9. Select the **Credit Card** information that displays to the right.
10. Click **Finish**.
11. Click **Yes** to create another **Order**.

Processing a Price Adjustment

Aptify allows users to make price adjustments to an order. This ability will override any prices that are set in the system. This assumes that the Order Entry Permissions for the Organization, Employee, or Order allow users to override prices.

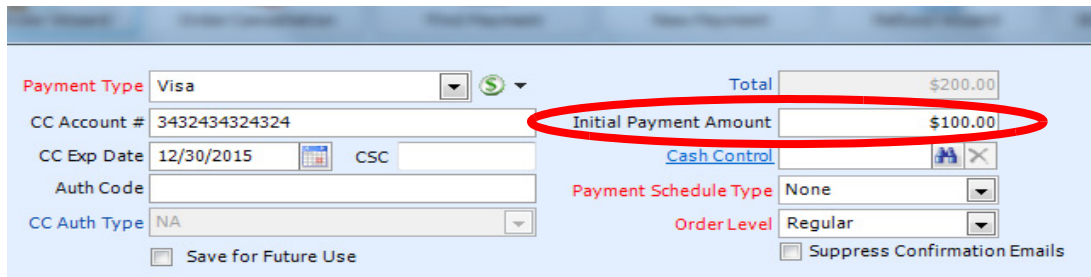
1. Create an order for **10** units of your **XYZ Product**.
 - The Order line uses a price of \$50 per unit, which is the Group Member price you created for the product.
2. Click in the **Price** field to display an ellipsis button.
3. In the price field, double-click to edit the price.
4. Enter **60** in the Price field.
5. Click out of the Price field and select **Yes** when the price override prompt appears.
 - The price changes to \$60/unit on the Order line and the Order Total updates to \$600.



Making a Partial Payment for an Order

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

1. Click on the **New Order Wizard** (Order Entry Dashboard).
2. Create an order line for **1** unit of your **XYZ Product**.
3. Select the **Saved Payments** icon next to the **Payments Type** drop-down.
4. Float the cursor over the **Persons** selection.
5. Select the **Credit Card** information that displays to the right.
6. Change the **Initial Payment Amount** from **\$200.00** to **\$100.00**.



The screenshot shows a payment form with the following fields and values:

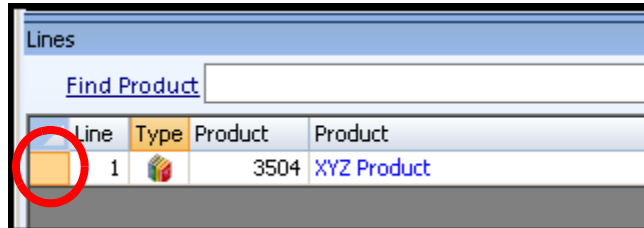
Payment Type	Visa	Total	\$200.00
CC Account #	3432434324324	Initial Payment Amount	\$100.00
CC Exp Date	12/30/2015	Cash Control	
Auth Code		Payment Schedule Type	None
CC Auth Type	NA	Order Level	Regular
<input type="checkbox"/> Save for Future Use		<input type="checkbox"/> Suppress Confirmation Emails	

The **Initial Payment Amount** field is highlighted with a red circle.

7. Click **Finish**.
8. Users can process additional **Payments** by using the **New Payment** button on the **Order Entry** dashboard.

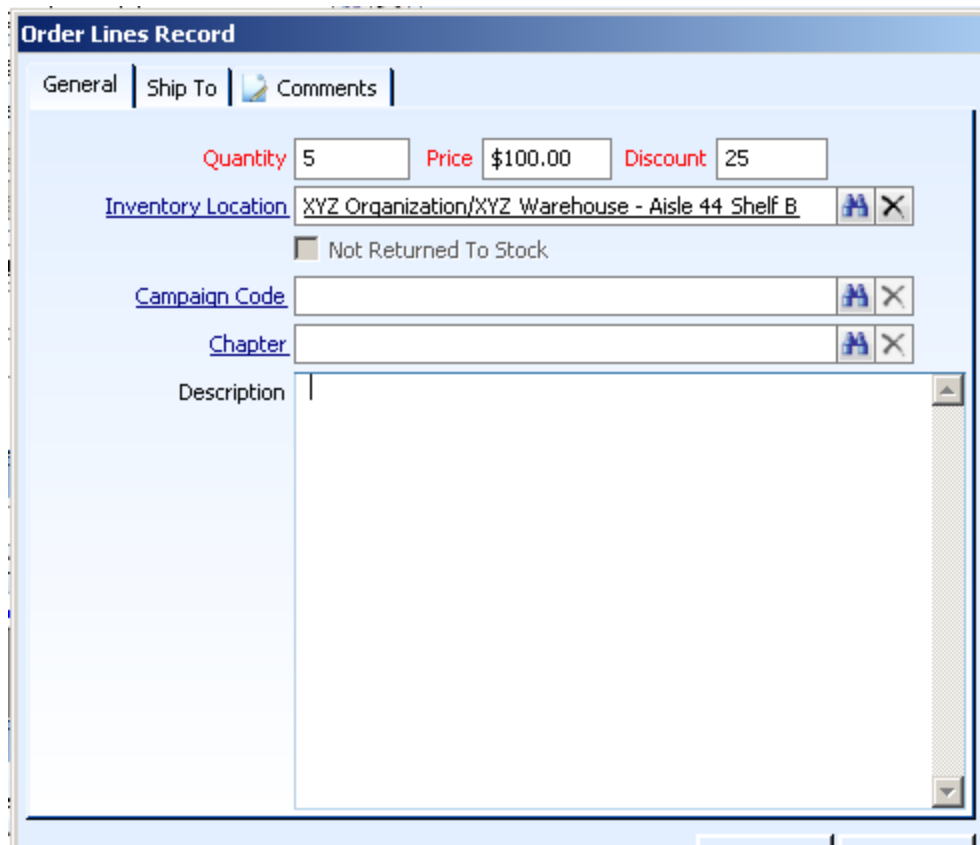
Paying with a Purchase Order

1. Open a new **Order**.
2. Create an order line for **3** units of your **XYZ Product**.
3. Double-click the far left, non-editable field in the order line to open the **Order Line Details** window.



Line	Type	Product	Product
1		3504	XYZ Product

4. Change the **Quantity** from 3 to 5.
5. In the **Discount** field, enter 25.
 - This will apply a 25% discount to the order line.



Order Lines Record

General | Ship To | Comments

Quantity 5 Price \$100.00 Discount 25

Inventory Location XYZ Organization/XYZ Warehouse - Aisle 44 Shelf B

Not Returned To Stock

Campaign Code

Chapter

Description

6. Click **OK**.
 - Notice that the Quantity, Price, and Discount fields have been updated based on the changes made in the Order Line Detail window.

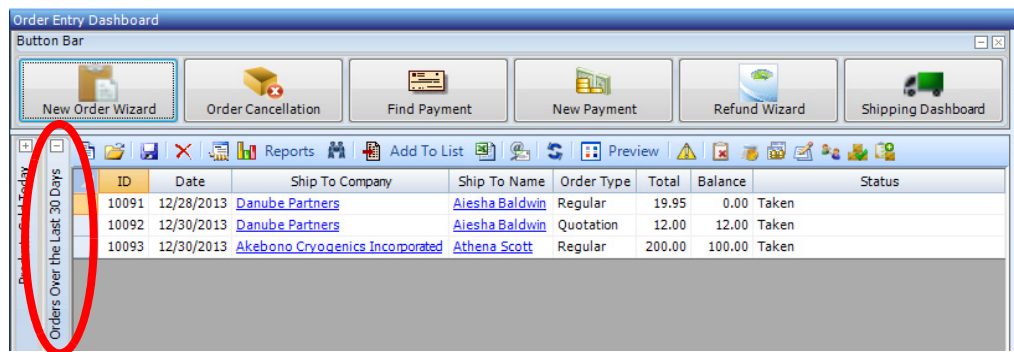
7. Select the **Customer** tab (if not already open).
8. Click the **Ship To Company** link to open the *XYZ* Company record.
9. Select the **Details >>Organization** tab on the *XYZ* Company record.
10. Confirm that the **Credit Status** is set to **Approved** and the **Credit Limit** is set to **\$10,000.00**.
 - Only Companies or Persons that have Credit Status set to Approved and a Credit Limit that is greater than the Order Total can use a Purchase Order to place an order.
11. Close the *XYZ Company* record.
12. Set the **Payment Type** to **Purchase Order** under the Order's Payment heading.
13. Enter **23** as the **PO #**.
14. Click **Save** and click **No** when asked if the user wants to ship the order.

Marking Orders As Shipped

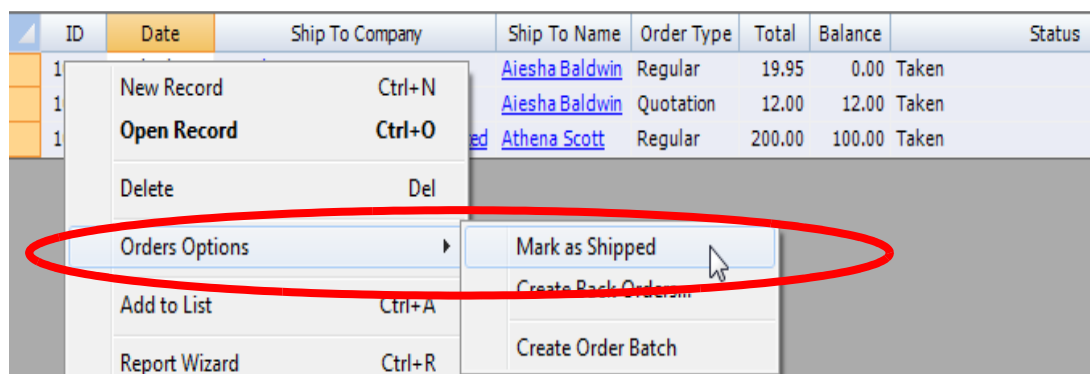
Once the products in an order have been shipped to a customer/member, users will need to change the Order Status from **Taken** to **Shipped**. For accounting purposes, General Ledger (GL) entries are created once an order is marked as shipped.

A user can manually open each Orders record and change the Order Status to Shipped (as done for the Order in Exercise 3) or a user can use the Marked As Shipped function (described in this exercise).

1. Observe the **Orders Over the Last 30 Days** view on the **Order Entry** dashboard.
2. All Orders should have a **Taken By** status.



3. Click to select **all** entries in the view.
4. *Right click* anywhere in the view and select **Order Options > Marked as Shipped**.

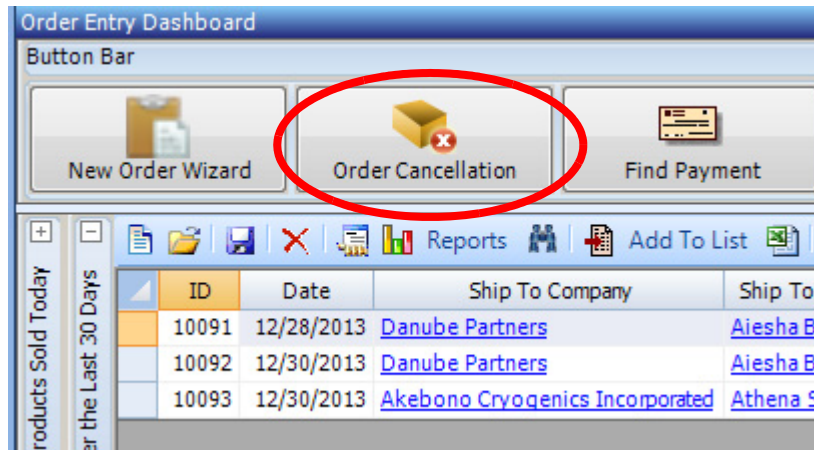


5. All Orders that qualify will now be marked as **Shipped**.
 - Orders in a **quoted** status will not be shipped; only orders that have a payment associated with them can be shipped.
 - This function is generally reserved/accessible for users who will be doing the actual packaging/shipping of the product. This function is also applicable to virtual products that not need to be packaged, but do need approval to be shipped
6. Refresh the View and confirm that the **Order Status** is **Shipped** for the Orders.

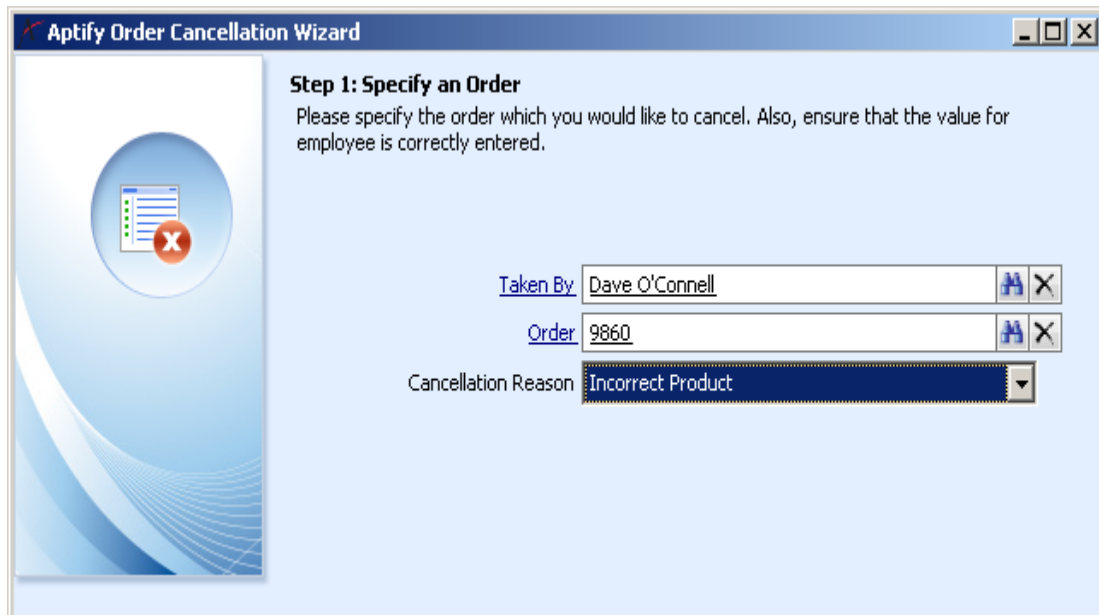
Canceling an Order with the Order Cancellation Wizard

In this exercise, users will cancel one of the **XYZ Product Orders** from a previous exercise.

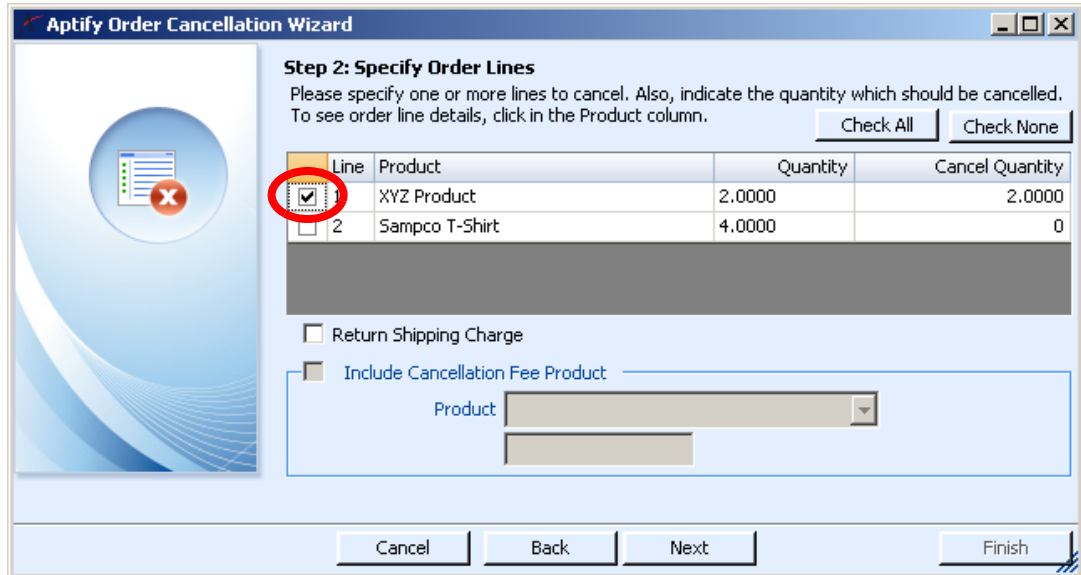
1. In the **View of Orders over the Last 30 Days**, select the first order listed.
2. Click the **Order Cancellation** button on the dashboard.d



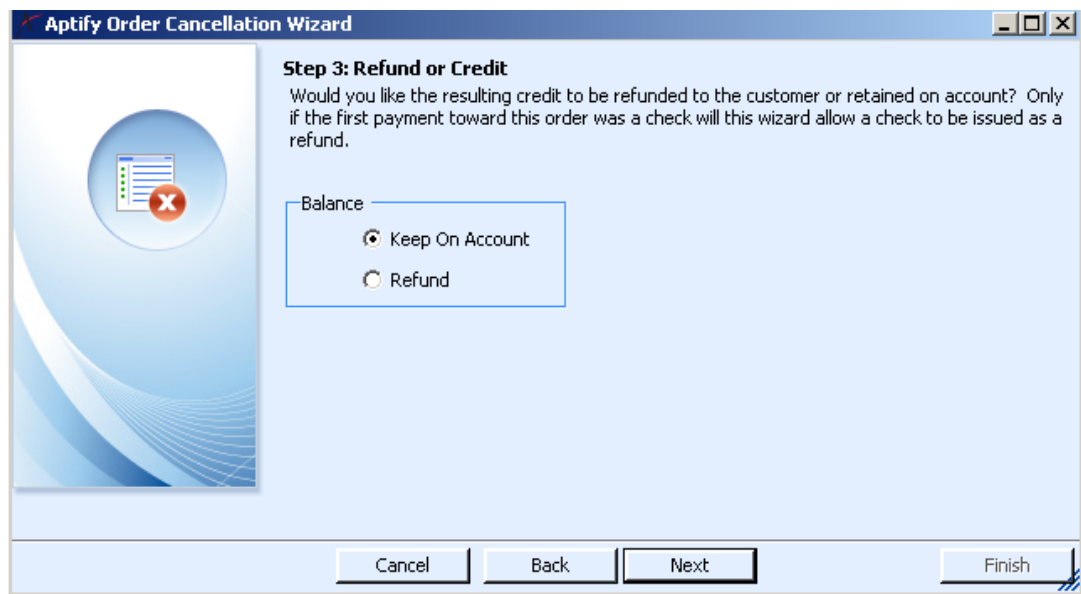
3. Review the welcome screen and click **Next**.
4. In the **Order** field, enter the first order number.
5. From the **Cancellation Reason** drop-down list, select **Incorrect Product**.
 - Employee should populate automatically based on your user's Employees record.l



6. Click **Next** to continue.
7. Place a check mark next to the **XYZ Product** order line to indicate that both units are being returned.



8. Click **Next** to continue.
9. Using the wizard, a user can either keep credits that result from a cancellation on account to apply against future orders (as a Credit Memo) or a user can refund the amount. In this case, select **Refund**.
 - The Refund Amount is automatically calculated to equal the Cancelled Amount. A user can specify a lower refund amount but not a greater one (the Refund Amount must be equal to or less than the Cancelled Amount).



10. Click **Next** to continue.
11. Click **Finish** to generate the cancellation order.
12. When prompted, click **Yes** to open the cancellation order and review its details.
 - 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.

Figure 10.1
Cancellation
Order

The screenshot displays the 'Order Entry - Aaronson, Edward/Danube Partners' window. The 'Order Addresses' section shows the shipping address: 910 Southwest Union Avenue, Palo Alto, CA 94301, Santa Clara, United States. The 'Lines' section contains a table with one line item:

Line	Type	Product ID	Product	Description	Quantity	Price	Discount	Extended
1		3507	XYZ Product		-1.0000	\$100.00	0	(\$100.00)

The 'Summary' section shows the 'Order Type' as 'Cancellation' and 'Order Status' as 'Taken'. The 'Order Totals' section shows a Sub-Total of (\$100.00), Shipping of \$0.00, Handling of \$0.00, Tax of \$0.00, Total of (\$100.00), and Balance of (\$100.00).

13. Change the **Order Status** to **Shipped** and save the order.
 - **A user need 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
14. Close the cancellation order.
15. Click **No** when prompted to cancel another order.

Objective.....	11.1
Making a Payment.....	11.2
Multiple Payments to An Order.....	11.3
A Single Payment to Multiple Orders	11.6
Apply a Single Payment to Multiple Order Lines	11.8
Over Payments.....	11.10

Objective

In this chapter, users 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 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

Users can use the Payments service 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

Summary Area on an Order Record

Users should access the **Summary** area to record any payment at the time of the order.

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

Payments Record

Locate Order/Invoice with Balance Due

Payment Lines: Applies a specified amount to an Order or Order Line

Payment Total

When a user takes an order with a payment on it, the system automatically generates this record.

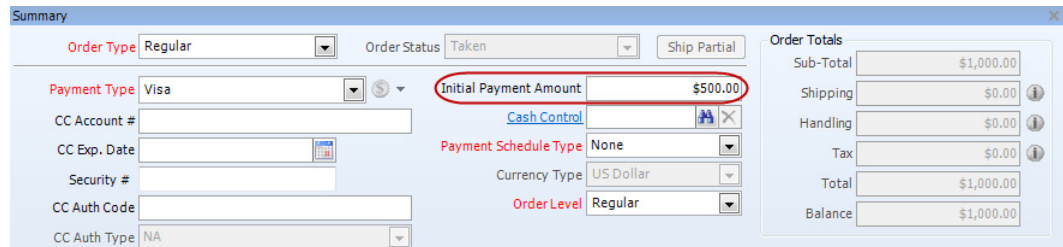
Payment Lines - reflect payment made to the order. Automatically assumes full payment.

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

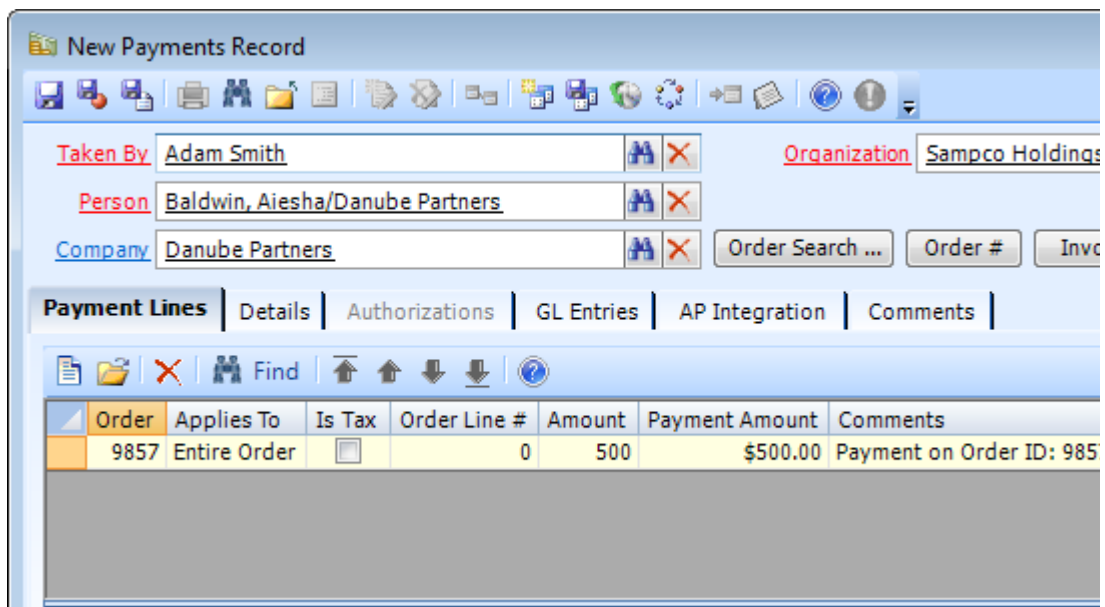
If a user knows what the order the payment is for, they can use the accounting tab of that order to generate this form.

Multiple Payments to An Order

1. Order an **XYZ Product** from your **Persons'** record **Orders** tab.
2. In the **Summary** area, enter the payment type.
3. In the **Initial Payment Amount** field, enter in half of the total amount that is due for the order (as illustrated in Figure 11.1).
 - Note that a user cannot enter a partial payment using a Purchase Order payment type, as a purchase order is a promise to pay the full amount.



4. Click **Save**. Click **NO** to not ship the order.
 - Note that the **Balance** field reflects an amount due after applying the partial payment.
5. Select the **Accounting** tab and then click the **Order Payments** sub-tab.
 - The system will display past payments applied to the order.
6. Click the **New Record** button to open a new Payments record.
 - The system automatically displays the payoff amount of the order. For this exercise, the payment amount will not be in full.



7. Double-click the **Payment Line** to open the **Payment Lines** record.
8. In the **Amount** field, enter half of the payoff amount.
9. Update the **Comments** to indicate that this is a partial payment.

Payment Lines Record

General | Comments

Applies To: Entire Order

Order: 9857

Order Detail:

Amount: \$250.00 US Dollar

10. Click **OK**.
11. On the new **Payments** record, select the **Details** tab.
12. From the **Payment Type** drop-down list, Select **Visa**.
13. In the **CC Account #** field, enter **4111111111111111**.
14. In the **CC Exp. Date** field, enter **12/31/2014**.

New Payments Record

Taken By: Adam Smith Organization: Sampco Holdings, Inc.

Person: Baldwin, Aiesha/Danube Partners

Company: Danube Partners Order Search ... Order # Invoice #

Payment Lines **Details** Authorizations GL Entries AP Integration Comments

Payment Status: Posted Payment Type: Visa

Payment Level: Regular CC Account #: 4111111111111111

Cash Control Batch: CC Exp. Date: 12/31/2014

Payment Date: 11/1/2011 Security #:

Deposit Date: 11/1/2011 CC Auth Code:

Effective Date: 11/1/2011 CC Auth Type: NA

Service Charge Account: Service Charge: \$0.00 Refund

Currency Type: US Dollar

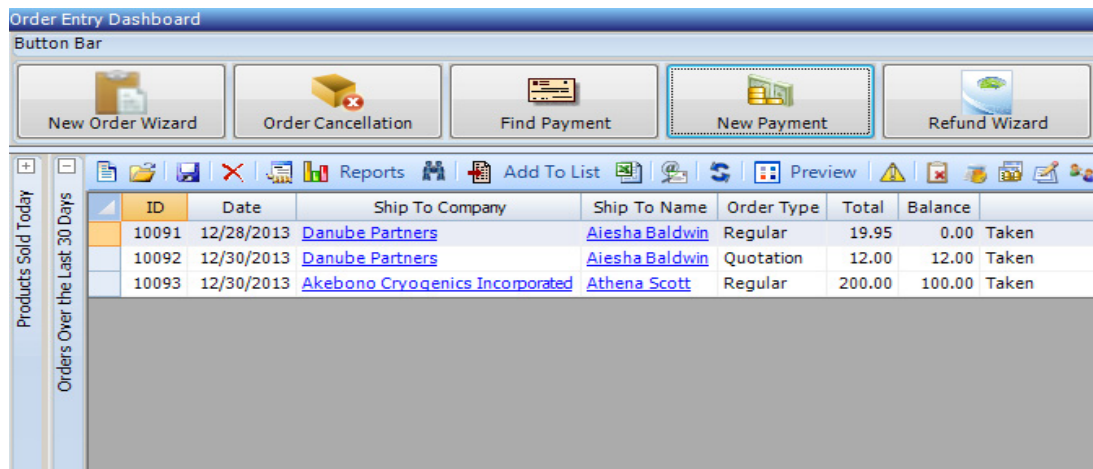
Status Info:

15. Click **Save and Close**.
16. Return to the **Order Payments** sub-tab on the Orders record.
 - Notice that the payment appears on the order.
17. Click **Save**.
18. Create another payment to pay off the remaining balance on the order.
 - Review Steps 6 through 15 if assistance is needed with this step.
19. Click **Save and Close**.

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.

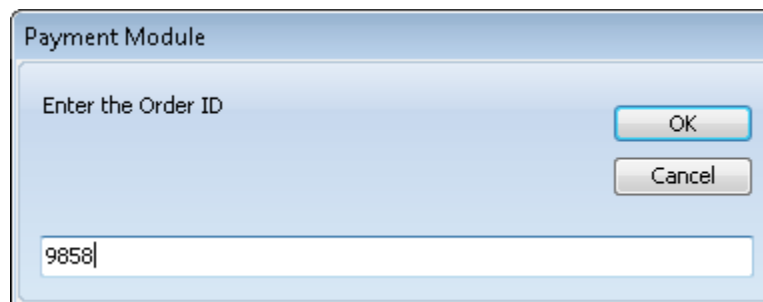
1. Open the **New Order Wizard** (Order Entry dashboard).
2. Create an order line for your **XYZ Product**.
 - The total should be \$100.
3. From the **Payment Type** drop-down list, select **Purchase Order**.
4. In the **PO #** field, enter **555**.
5. Click **Finish**.
6. **Repeat** steps 1-4 (use **556** for the PO #).
7. Observe the **Orders over the Last 30 Days** (Order Entry dashboard).
8. Write down the **TWO PO Order IDs**: _____



The screenshot shows the 'Order Entry Dashboard' with a 'Button Bar' containing 'New Order Wizard', 'Order Cancellation', 'Find Payment', 'New Payment', and 'Refund Wizard'. Below the buttons is a table titled 'Orders Over the Last 30 Days' with the following data:

ID	Date	Ship To Company	Ship To Name	Order Type	Total	Balance	
10091	12/28/2013	Danube Partners	Aiesha Baldwin	Regular	19.95	0.00	Taken
10092	12/30/2013	Danube Partners	Aiesha Baldwin	Quotation	12.00	12.00	Taken
10093	12/30/2013	Akebono Cryogenics Incorporated	Athena Scott	Regular	200.00	100.00	Taken

9. From the **Order Entry** dashboard, select **New Payments** button.
10. Click the **Order #** button and enter the ID for one of the orders written down in Step 8.

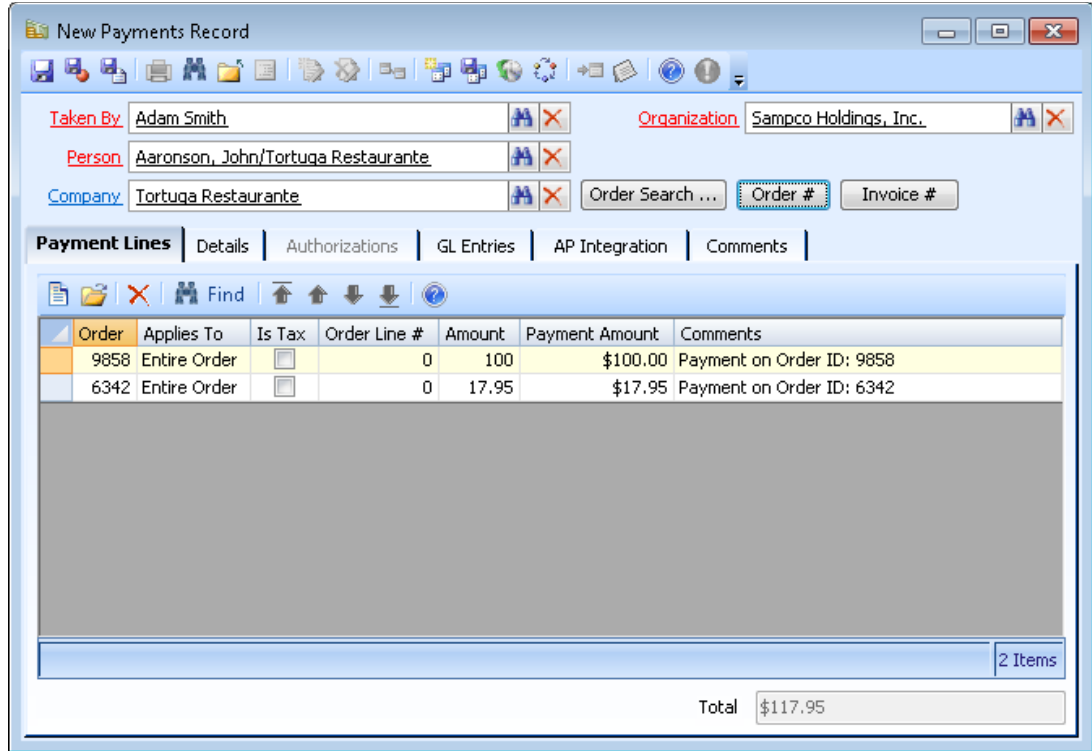


The screenshot shows a 'Payment Module' dialog box with the following elements:

- Title: Payment Module
- Text: Enter the Order ID
- Buttons: OK, Cancel
- Input field: 9858

11. Click **OK**.
 - A payment line is added for the full amount remaining on the order entered.

12. Click the **Order #** button again and enter the ID for the other order from Step 8.
13. Click **OK**.
 - A second payment line is added to the form.



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. Open the **Orders Over the Last 30 Days** view (Order Entry dashboard).
 - Notice that the two orders Balance Total is now \$0.00.
19. Open one of the orders from step 8 and select the **Accounting > Order Payments** tab.
 - Notice that the payment created appears under the **Accounting** tab.
20. Close all open records.

Apply a Single Payment to Multiple Order Lines

At times, customers may only send a payment to pay for one item on a Purchase Order.

1. Open a new **Order** from the **New Order Wizard**.
2. Create order lines for the following products:
 - Line 1: **3 Sampco Baseball Hats**
 - Line 2: **2 XYZ Kit Product**
3. From the **Payment Type** drop-down list, select **Purchase Order**.
4. In the **PO #** field, enter **899**.
5. Click **Save**.
6. Write down the amount in the **Extended** column for each order line item.
 - Line 1: ____
 - Line 2: ____
 - The order should have two order lines.
7. **Save and Close** the order.
8. Click on the **New Payment** button.
9. Click the **Order #** button.
10. Enter the **Order ID** from Step 7 and click **OK**.
 - Aptify adds a payment line for the full amount owed on the order.
11. Double-click the payment line to open the **Payment Lines** record.
12. Click the **Applies To** drop-down list and select **Order Line**.
13. From the **Order Detail** drop-down list, select order line **1** to apply a payment only against the Sampco Baseball Hat order line.
14. On the **Payment Lines** record, enter the extended amount for Line 1 in the **Amount** field.
15. Edit the **Comments** field and indicate this payment applies to one line of the order.

The screenshot shows the 'Payment Lines Record' dialog box. It has two tabs: 'General' and 'Comments'. The 'General' tab is active. The 'Applies To' dropdown is set to 'Entire Order'. The 'Order' field contains '9265'. The 'Order Detail' dropdown is empty. The 'Amount' field contains '\$0.00'. The currency is set to 'US Dollar'. There are 'OK' and 'Cancel' buttons at the bottom right.

16. Click **OK**.
17. To open a second Payment Lines record, click the **New** button.
18. Click the **Applies To** drop-down list and select **Order Line**.
19. In the **Order** field, enter the **Order ID** from Step 7.
20. From the **Order Detail** drop-down list, select order line 2.
21. In the **Amount** field, enter the extended amount for Line 2.
22. In the **Comments** field, enter **Payment for 2 XYZ Kit Product**.
23. Click **OK**.
 - Note that the Payment Total has increased to cover the entire order total.
24. On the new Payments record, select the **Details** tab.
25. From the **Payment Type** drop-down list, select **American Express**.
26. In the **CC Account #** field, enter **33333111122222**.
27. in the **CC Exp. Date** field, enter **1/1/2012**.
28. Click **Save and Close**.

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 select the **Order Payments** sub-tab.
5. *Right click* under the Payments area and select **New Record** from the pop-up list.
 - 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.

Order	Applies To	Is Tax	Order Line #	Amount	Payment Amount	Comments
9866	Entire Order	<input type="checkbox"/>	0	19.95	\$19.95	Payment in full on Order #9866 to Sampco Base
9866	Entire Order	<input type="checkbox"/>	0	200.00	\$200.00	Customer Overpayment

Total \$219.95

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**.

Objective.....	12.1
Creating a Membership Dues Product.....	12.3
Ordering a Membership Dues Product.....	12.6
Manually Renewing Memberships/Subscriptions.....	12.8
Auto-Renewing Memberships/Subscriptions.....	12.10
Fulfilling the Auto-Renewal Standing Order.....	12.11
Cancelling a Membership/Subscription.....	12.12

Objective

In Associations and Membership based organizations, the most important aspect tracked 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.

Recall that Aptify allows 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 these same steps/processes can be applied to Magazines, Periodicals, Newsletters, etc.

Two Types of Subscriptions

There are two types of basic subscriptions that will be examined in this chapter:

- **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 clicks the Auto Renew checkbox on the Subscription tab
 - Subscription is shipped
 - User can open up the Subscription order that was generated
 - User can open the Renewal tab & click on 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:

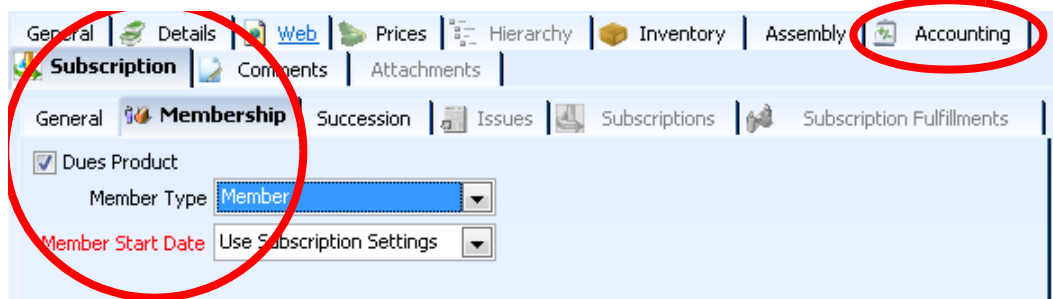
- **Changes in an order line Quantity increase length of subscription**
 - For example, ordering a Monthly Newsletter with a quantity of 2 creates a two-year subscription
- **Ordering multiple copies of each issue for same Person/Company**
 - Known as a "Bulk Subscription"
 - Specify number of copies on Order Line Details form
 - Order Total increases automatically if the number of copies increases

Creating a Membership Dues Product

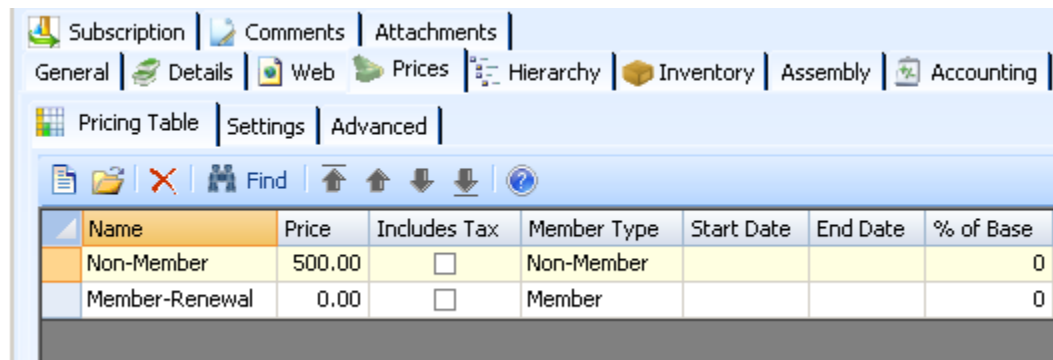
1. Click the **Product Maintenance** Application; open a new **Products** record.
2. In the **Name** field, enter **XYZ Membership Dues** (where *XYZ* are your initials).
3. In the **Category** field, enter **Memberships**.
4. Verify that **Type** is set to **General**.
5. Select the **Subscription** tab.
6. In the **Subscription Item** checkbox, place a **check mark**.
7. From the **Subs. Type** drop-down list, select **Monthly**.
8. In the **Issues** field, enter **12**.
 - Even though this is a one-year membership, a user configures the Subscription Type to Monthly with 12 issues to comply with General Accepted Accounting Principles (GAAP).
9. In the **Grace Period** field, enter **1**.
10. Verify that the **Restart After Days** field is set to **180**.
11. Change the **Restart By** field to **Restart with New Subscription**.

The screenshot shows the 'Subscription Item' configuration form. The 'Subscription Item' checkbox is checked and circled in red. The 'Subs. Type' dropdown is set to 'Monthly', 'Issues' is 12, and 'Grace Period' is 1. The 'Renewal Behavior' section shows 'Restart After Days' as 180 and 'Restart By' as 'Restart with New Subscription'. The 'Calendar Year Subscription' section shows 'Start Date', 'Turnover Date', and 'Prorate Behavior' as 'None'.

12. Select the **Membership** sub-tab (Under **Subscription** tab).
13. In the **Dues Product** checkbox, place a **check mark**.
14. In the **Member Type** field., enter **Member**
15. Leave the **Member Start Date** field set to **Use Subscription Settings**.



16. Select the **Accounting** tab and verify that the **Deferred Income** checkbox is checked.
17. Select the **Prices** tab.
18. Add a default **Non-Member** price of **\$500**.
19. Add a **Member-Renewal** price of **\$250**.



20. **Save** and **Close** the record.

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.

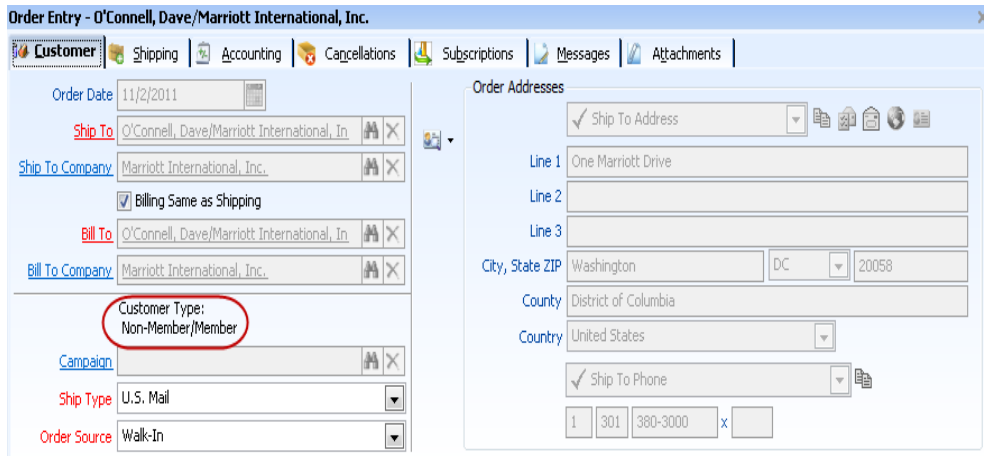
Ordering a Membership Dues Product

This exercise demonstrates how a Non-Member places an order for a dues product and how their Non-Member status automatically changes to a Member status.

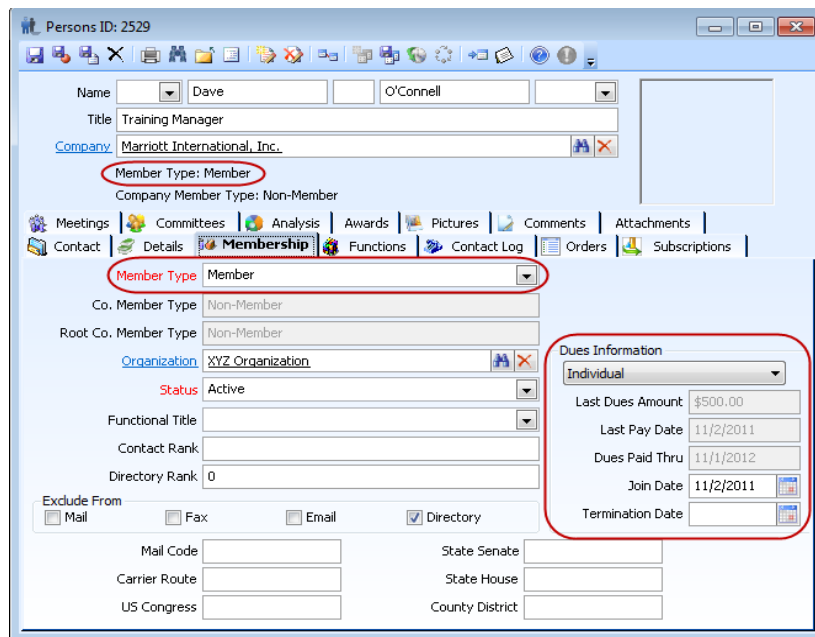
1. Open a **Persons** record.
2. Select the **Membership** tab.
3. Note that the **Member Type**, **Co. Member Type**, and **Root Co. Member Type** are set to **Non-Member**.

The screenshot shows a software window titled "Persons ID: 2529". The main content area displays the record for "Dave O'Connell", Training Manager at "Marriott International, Inc.". The "Membership" tab is active, showing three dropdown menus: "Member Type" (Non-Member), "Co. Member Type" (Non-Member), and "Root Co. Member Type" (Non-Member). These three fields are circled in red. Other fields include "Organization" (XYZ Organization), "Status" (Active), "Functional Title", "Contact Rank", "Directory Rank" (0), and "Dues Information" (Individual, Last Dues Amount \$0.00). There are also checkboxes for "Exclude From" (Mail, Fax, Email, Directory) and address fields like "Mail Code", "Carrier Route", "US Congress", "State Senate", "State House", and "County District".

4. Select the **Orders** tab.
5. In the toolbar, click the **New Record** button.
6. Create an order line for 1 unit of **XYZ Membership Dues**. (Find XYZ membership product, click ADD)
7. Enter payment information (use either Pre-Paid Check or a Credit Card). If CC, checkbox at bottom labeled, **Save for future use**.
8. When asked if the user wants to ship the order, click **Save** and click **Yes**.
 - Click the **Refresh** button.
 - Notice that the Customer Type reported on the Order changes to **Non-Member/Member**.



9. From the order record, select the **Subscriptions** tab.
 - Notice that a Dues Subscription was created for this order.
10. **Save** and **Close** the order to return to the **Persons** record.
11. At the top of the Persons record, click the **Refresh** button.
12. On the Persons record, select the **Membership** tab.
13. Note the following changes that were made to the **Membership** tab:
 - The **Member Type** has changed to **Member**.
 - The **Dues Information** section is now filled in.



14. Close the **Persons** record.

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:

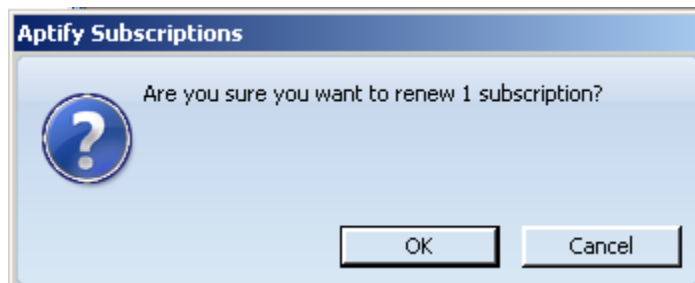
1. Click the **Membership** dashboard.
2. Observe the **All Active Subscriptions** view.
3. Select the **Membership Dues** subscription at the very top - sorted by ID.
4. Click the **Subscription Renewal Wizard** icon in the View Toolbar.



The screenshot shows a software interface with a toolbar at the top containing icons for file operations, reports, and adding items to a list. Below the toolbar is a table with the following data:

ID	Subscriber	SubscriberCompany	Product
1836	Spencer King		XYZ Subscription

5. When prompted that the user is renewing 1 subscription, click **OK**.



6. In the **Due Date** field when prompted, enter the last date of next month.

7. Click **OK** to continue.
8. When prompted that the renewal process is complete, click **OK**.
 - Aptify automatically created an order quotation for the subscription renewal.
9. Click the **Order Entry** dashboard
10. Look under the **Orders Over the Last 30 Days** view.
11. Locate the most recent order whose **Ship To Name** is your **Person**
 - This should be the order in the view with the highest ID number since it was the last order created by the system using your Employees record.
12. Double-click to open the quotation order.

Line	Type	Product ID	Product	Description	Quantity	Price	Discount	Extended
1		3510	XYZ Membership Dues	Individual Sub: Dave O'Connell. Start: 11/2/2012 # Copies: 1	1.0000	\$0.00	0	\$0.00

Summary

Order Type: Quotation (highlighted) | Order Status: Taken | Ship Partial: [button]

Payment Type: Purchase Order | Initial Payment Amount: \$0.00

PO #: RENEWAL | Cash Control: [button]

Terms: [field] | Payment Schedule Type: None

Due Date: 12/31/2011 | Currency Type: US Dollar

Order Level: Regular

Order Totals

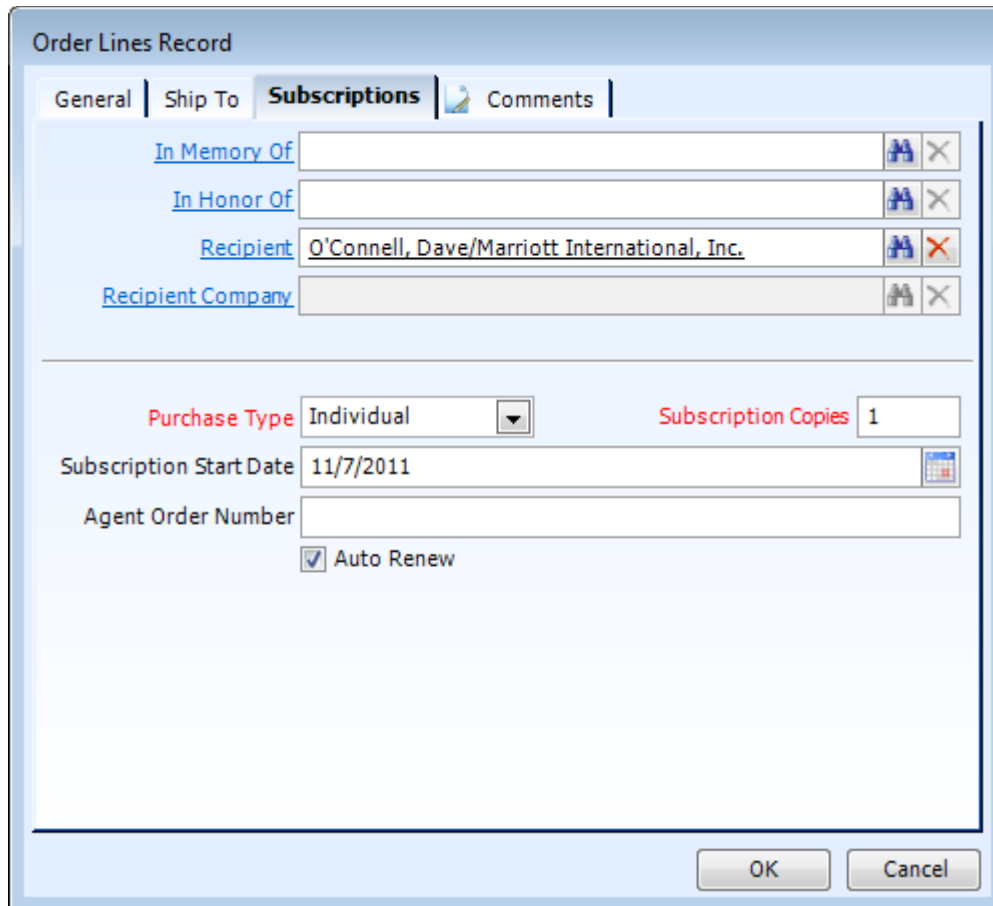
Sub-Total	\$0.00
Shipping	\$0.00
Handling	\$0.00
Tax	\$0.00
Total	\$0.00
Balance	\$0.00

13. Change the **Order Type** from **Quotation** to **Regular**.
14. 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.
15. Click **Save** and click **Yes** to ship the order.
16. Select 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** on the Marketing tab 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. Click the **Order Entry** Application
2. Click the **New Order Wizard**.
3. Enter a persons' record information. Create an order line for 1 unit of your **XYZ Subscription** product.
4. Open the **Order Lines** record by double-clicking the orange box to the far left.
5. Select the **Subscriptions** tab of the **Order Lines** record.



The screenshot shows the 'Order Lines Record' dialog box with the 'Subscriptions' tab selected. The dialog has four tabs: 'General', 'Ship To', 'Subscriptions', and 'Comments'. The 'Subscriptions' tab contains the following fields and controls:

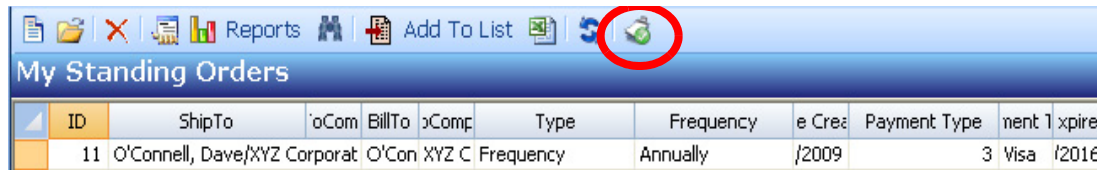
- In Memory Of**: Text input field with a help icon and a close icon.
- In Honor Of**: Text input field with a help icon and a close icon.
- Recipient**: Text input field containing 'O'Connell, Dave/Marriott International, Inc.' with a help icon and a close icon.
- Recipient Company**: Text input field with a help icon and a close icon.
- Purchase Type**: A dropdown menu currently set to 'Individual'.
- Subscription Copies**: A text input field containing the value '1'.
- Subscription Start Date**: A date input field containing '11/7/2011' with a calendar icon.
- Agent Order Number**: A text input field.
- Auto Renew**: A checked checkbox.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

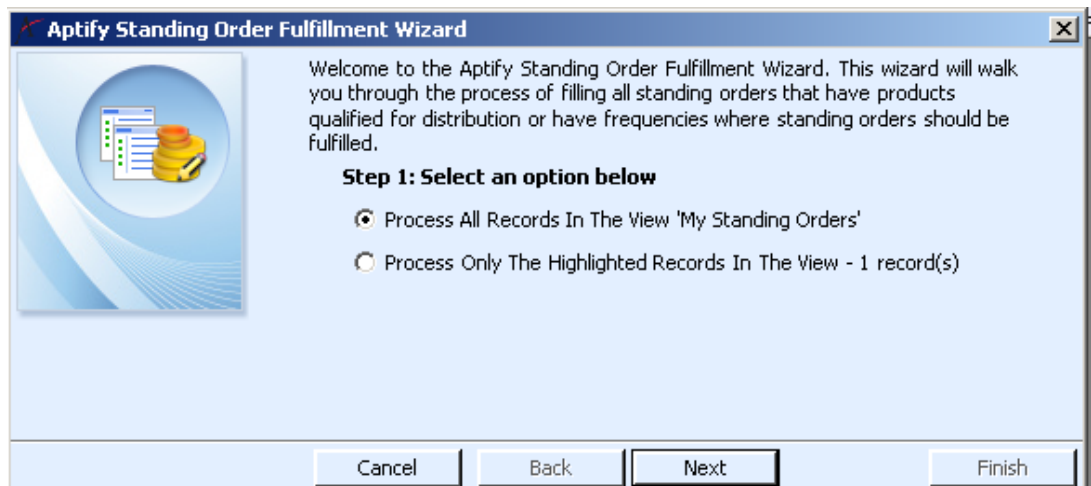
6. Check the **Auto Renew** checkbox.
7. Click the **OK** button.
8. **Finish** processing the order in the **New Order Wizard**.
9. **Ship** the order from the **Orders Over the Last 30 Days** view.

Fulfilling the Auto-Renewal Standing Order

1. Click the **Membership** dashboard.
2. Observe the **Active Standing Orders** view.
3. Select the **Membership Dues** standing order at the very top - sorted by ID.
4. Click the **Standing Order Fulfillment Wizard...** button in the View Toolbar to launch the wizard.



5. Click **Next** to continue.
6. Select the **Process Only The Highlighted Records In The View** option.

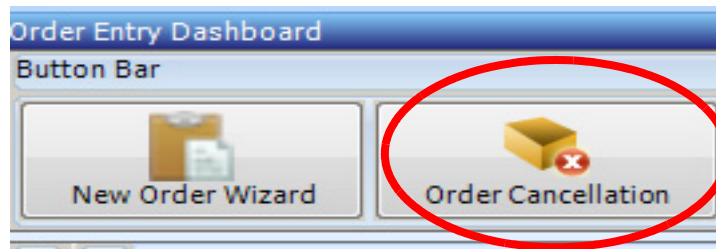


7. Click **Next** to continue.
8. For Step 2, the wizard automatically inserts today's date as the Order Date. Click **Next** to continue without changing the Order Date.
9. To process the **Standing Order**, click **Finish** and then when prompted, click **OK**.
10. When notified that the Standing Order 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.

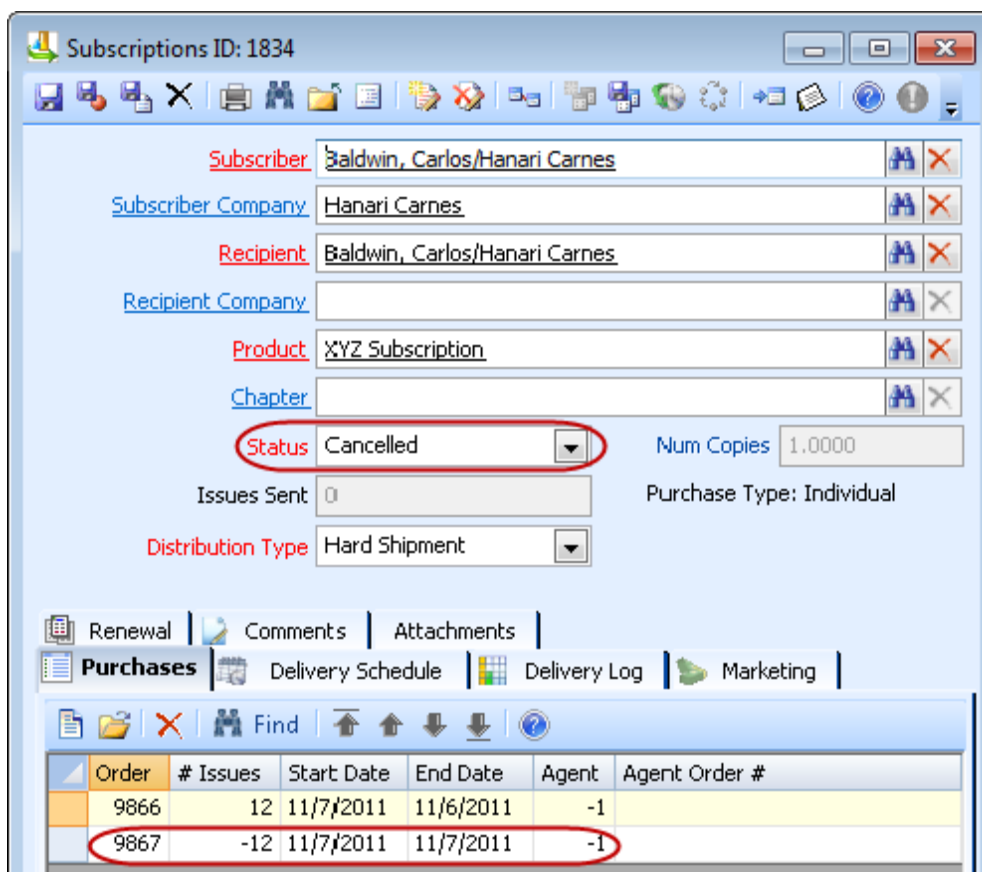
Cancelling a Membership/Subscription

Subscriptions - Full Cancellation

1. Open the **New Order Wizard** from the **Order Entry** dashboard.
2. Create an order line for **1** unit of your **XYZ Subscription** product.
3. Enter the payment information - use saved credit card info.
4. **Ship** the Order from the **Orders Over the Last 30 Days** view.
5. In the View Toolbar, click the **Order Cancellation Wizard** button to launch the wizard.



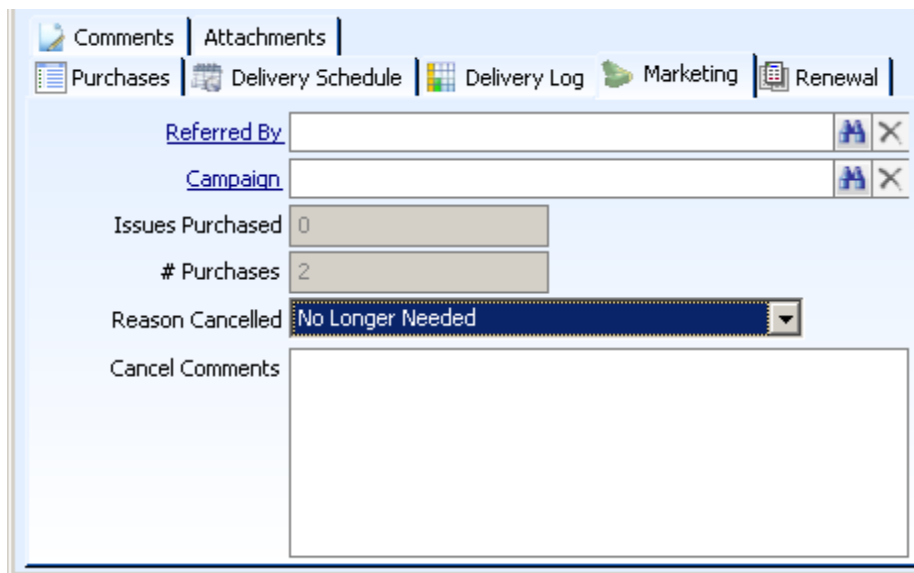
6. Click **Next**.
7. In the **Order** field, enter the **ID** of the order created above (the subscription).
8. From the **Cancellation Reason** drop-down list, select **Incorrect Product**.
9. Click **Next**.
10. To the left of the row for the **XYZ Subscription** order line, place a **check mark**. Leave the **Cancel Quantity** set to **1**.
11. Click **Next** and follow the on-screen instructions to complete the cancellation process.
 - When prompted to select a balance type, select **Refund**. If prompted, in the **Check Number** field, enter "12345" for the refund check.
12. To open the cancellation order when prompted, click the **Yes** button.
13. When prompted, change the **Order Status** to **Shipped** and select **Yes**.
14. **Save and Close** the order.
15. When asked to process another cancellation, click **No** and close the wizard.
16. Open the view of the **Subscriptions** service.
17. Double-click the 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.



18. Select the **Marketing** tab.

- Notice that the number of Issues Purchased is 0.

19. From the **Reason Cancelled** drop-down list, select **No Longer Needed**.



20. Click **Save and Close**.

Subscriptions - Partial Cancellation

1. Open a new **Orders** form from the **Persons** record.
2. Create an order line for **1** unit of your **XYZ Subscription** product.
3. Enter the payment information in the Summary area (use Pre-Paid Check or Credit Card).
4. When asked to ship the order, click **Save** and click **Yes**.
5. Select the **Subscriptions** tab to confirm that a Subscription has been generated.
6. **Save and Close** the order.
7. Open a view of the Orders service.
8. Select the most recent order.
9. In the View Toolbar, click the **Order Cancellation Wizard** button to launch the wizard.
10. Click **Next** to begin the wizard.
11. Observe that the ID of the order created above (your **Persons** subscription) is already entered in the **Order** field.
12. Leave the **Cancel Reason** field blank.
13. Click **Next**.
14. In the checkbox for the XYZ Subscription order line, place a check mark.
15. Set the **Cancel Quantity** to **.5**.
 - 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.

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.

Line	Product ID	Product	Description	Extended	Quantity	Cancel Quantity
<input checked="" type="checkbox"/>	3511	XYZ Subscription	Individual Sub: James Cross. Start: 11/7/2011 # Copies: 1	\$39.95	1.0000	0.5

Return Shipping Charge

Include Cancellation Fee Product

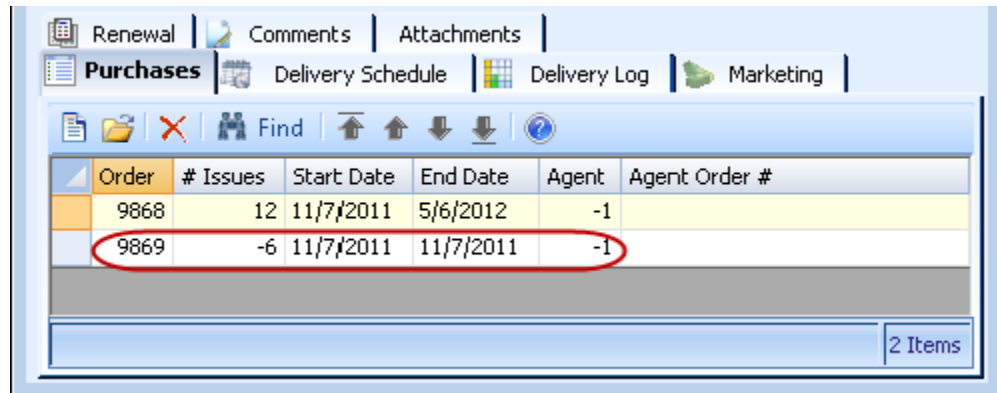
Product:

Fee:

16. To complete the cancellation process, click **Next** and follow the on-screen instructions.
 - When prompted to select a balance type, select **Keep On Account**.
17. Click **Yes** when asked to open the cancellation order.

Membership Dues & Subscriptions

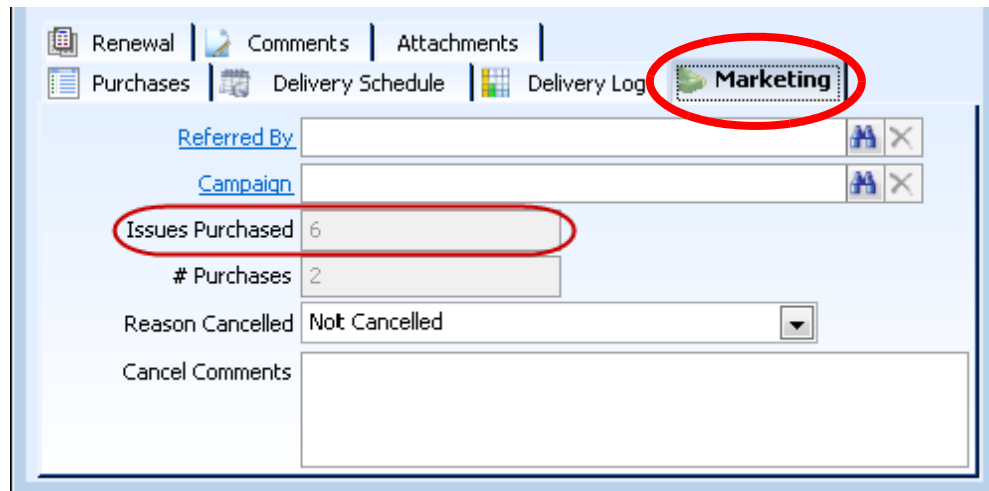
18. Change the **Order Status** to **Shipped** and when prompted, select **Yes**.
19. **Save and Close** the order.
20. When asked to process another cancellation, click **No**.
21. Open the view of the **Subscriptions** service.
22. Double-click the most recent entry to open the Subscriptions record.
 - Notice that the Subscription's Status is still Active but the End Date for the original subscription purchase is 6 months out rather than 1 year).



Order	# Issues	Start Date	End Date	Agent	Agent Order #
9868	12	11/7/2011	5/6/2012	-1	
9869	-6	11/7/2011	11/7/2011	-1	

2 Items

23. Select the **Marketing** tab.
24.
 - Notice that the number of **Issues Purchased** is 6.



Referred By:

Campaign:

Issues Purchased: 6

Purchases: 2

Reason Cancelled: Not Cancelled

Cancel Comments:

Objective.....	13.1
Using the Campaign Setup Wizard.....	13.2
Adding Prospects to a Campaign.....	13.4
Creating a Campaign Segment	13.6
Adding Prospects from a Campaign Segment.....	13.7
Applying a Campaign to an Order.....	13.8

Objective

In this chapter, users will have the opportunity to work with Campaigns. This includes:

- Creating Campaigns, manually or using the Campaign Setup Wizard
- Creating Campaign Segments to target users' 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:

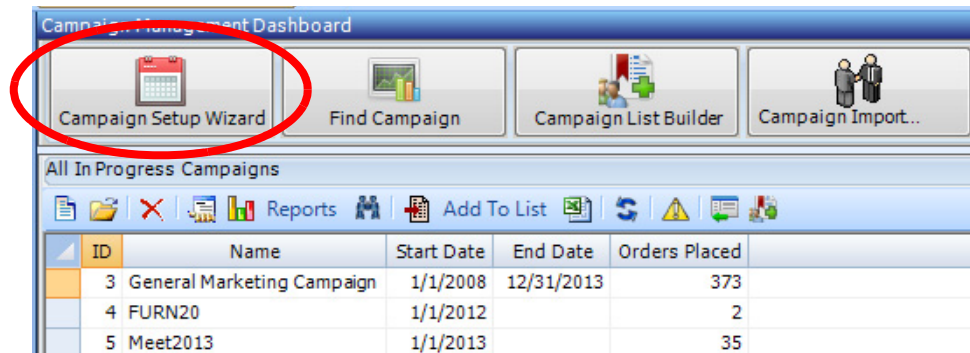
- Discount products based on Membership type
- Discount Products and/or Product Categories
- Tie a Prospect List to a campaign
- Track Prospect status
- Whether they have accepted or declined the marketing offer
- Track Documents and Tasks related to a Campaign effort

At the time of order, the order entry clerk can specify a campaign for the entire order **or** apply the campaign to a specific order line

Using the Campaign Setup Wizard

The Campaign Management application enables users to incorporate products specifically tied to a marketing campaign in order to offer discounted prices. Once a campaign is tied to an order, all products linked to the campaign will display the appropriate discount.

1. Click to open the **Campaign Management** dashboard.
2. Click the **Campaign Setup Wizard** 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.
 - The wizard automatically populates today's date in the **Start Date** field. Users can modify this date as necessary.
6. In the **Coordinator** field, enter the **Employee**.
7. Select 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.

Define the campaign
Please enter the description, start date, end date, and coordinator for the campaign.

Name: XYZ Campaign

Description: Introduce XYZ Product

Start Date: 1/24/20XX

End Date: 2/24/20XX

Coordinator: John Samuels

Invitation Required

Buttons: Cancel, Back, Next, Finish

8. Click **Next**.
9. Leave the **Status** as **In-Progress**.

10. In the **Type** field, enter **Marketing**.

11. Click **Next**.

12. Select **No** to not add **category pricing** and click **Next**.

- Discount Pricing can be added for a whole Category of different products.

13. Select **Yes** to add **per-product pricing** to the campaign and click **Next**.

14. In the **Product** field, enter **XYZ Product**.

15. In the **Discount Type** column for both Member & Non-Member row, select **Discount %**.

16. In the **Amount** field for the Member row, enter **20%**.

17. In the **Amount** field for the Non-Member row, enter **10%**.

Member Type	Discount Type	Amount	Sub Member Type?
Corporate Member	Discount %	20.0%	<input type="checkbox"/>
Individual Member	Discount %	20.0%	<input type="checkbox"/>
Member	Discount %	20.0%	<input type="checkbox"/>
Non-Member	Discount %	10.0%	<input type="checkbox"/>
Student Member	Discount %	20.0%	<input type="checkbox"/>

18. In the **Amount** field for all other Member Types, enter **20%**.

19. Click **Next**.

20. When asked if a user wants to enter another product, select **No**, and click **Next**.

21. Click **Finish** to create the **Campaigns** record and click **OK** when the prompt appears.

22. Open the **Campaigns** record just created.

23. Select the **Discounts** tab and note how the wizard applied the settings to the record.

24. Click **Close**.

Adding Prospects to a Campaign

A list of prospects can be added to campaigns to identify the target audience for a direct marketing campaign. Aptify provides several techniques to add Persons to a Campaign's Prospect List.

1. Open the **XYZ Campaign** record (if not already open).
2. Select the **Prospect List** tab.
 - Click the **New Record** button to open a new Campaign List Detail record.
3. From the **Type** drop-down list, select **Person**.
4. Use the Find Items dialog to locate the **Habika Harris** record (ID 8).
 - After selecting the record, **Harris, Habika/X.E. Awaken Components Limited** should appear in the Person field.
5. The **Prospect Status** field should default to **Invited**.
 - After a Person has responded to the marketing offer, they would return to this screen and change the Person's status as appropriate.

The screenshot shows a web browser window titled "New Campaign List Detail Record". The interface includes a toolbar with various icons and a tabbed menu with "General", "Comments", and "Attachments". The form fields are as follows:

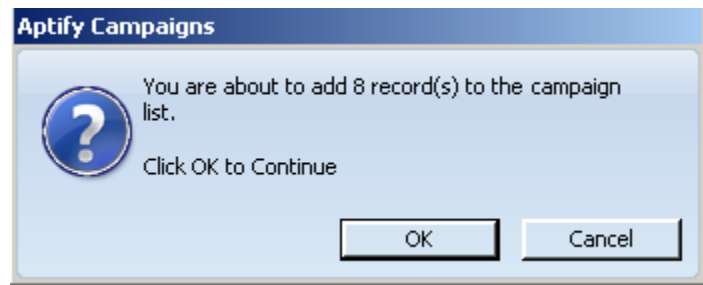
- Campaign:** XYZ Campaign
- Type:** Person
- Person:** Harris, Habika/X.E. Awaken Components Limited
- Company:** (empty)
- Campaign Segment:** (empty)
- Is Generated:**
- Prospect Status:** Invited

6. **Save** and close the **Campaign List Detail** record.
7. Open a second **Campaign List Detail** record from the **Campaign's Prospect List** tab.
8. From the **Type** drop-down list in the second row, select **Company**.
9. Use the Find Items dialog to locate the **U. Hardwick Physics AB** record (ID 2).
10. Clear the **Prospect Status** field and enter **Invited**.
11. Click **Save and Close**.

12. Open the **All View** of **Persons**.
13. In the **All View**, select the **first 8 persons** that display.
14. In the View Toolbar, click the **Add to Campaign** button.

ID	First Name	Last Name	Company	
4	Baka	Lambert	Ottoman	President
346	Pablo	Harris	Ottoman	Advertising Ma
688	Edward	King	Ottoman	Director, Sales
1030	Valerie	Garner	Ottoman	Marketing Seni
1372	Jessica	Hale	Ottoman	Advertising As
1714	Yale	Wade	Ottoman	Director, Infor
2056	Gary	Carter	Ottoman	Marketing Dire
2398	Xia	Johnson	Ottoman	VP, Research

15. Use the **Find Items** dialog to select the **XYZ Campaign** record.
16. Click **OK** when prompted to add the **Persons** to the selected campaign.



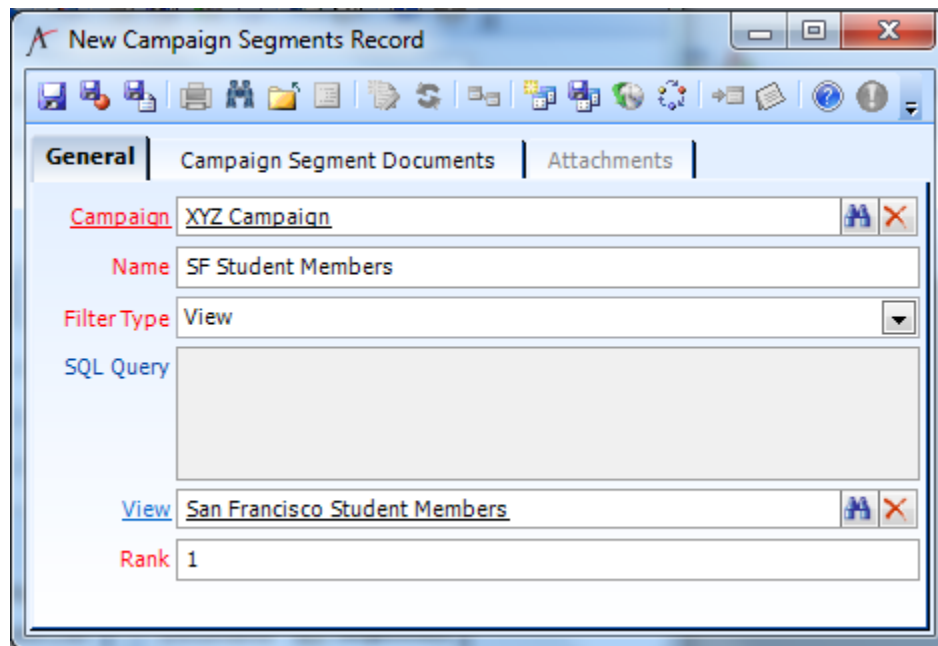
17. Click **OK** after the records have been added to the campaign.
18. Open your **XYZ Campaign** record.
19. Confirm the **8 Persons** from the **All View** have been added to campaign's prospect list.

ID	Type	Person	Company	Status	Campaign
3136	Person	Harris, Habika/X.E. Awaken Components Limited		Invited	
3137	Person	Baldwin, Aiesha/Danube Partners		Invited	
3138	Person	Wade, Alexandra/U. Hardwick Physics AB		Invited	
3139	Person	Scott, Athena/Akebono Cryogenics Incorporated		Invited	
3140	Person	Lambert, Baka/Ottoman		Invited	
3141	Person	Yukon, Dacey/Polyhedron Power Devices		Invited	
3142	Person	Robinson, Emily/VC Osaka Technologies Group, Inc		Invited	

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, users will create a Campaign Segment for the XYZ Product Launch Campaign.

1. Open a new record from the **Campaign Segments** service.
2. In the **Campaign** field, enter **XYZ Campaign**.
3. In the **Name** field, enter **SF Student Members**.
4. From the **Filter Type** drop-down list, select **View**.
5. From your shortcuts, select the **San Francisco Student Members** view.
6. In the **Rank** field, enter **1**.



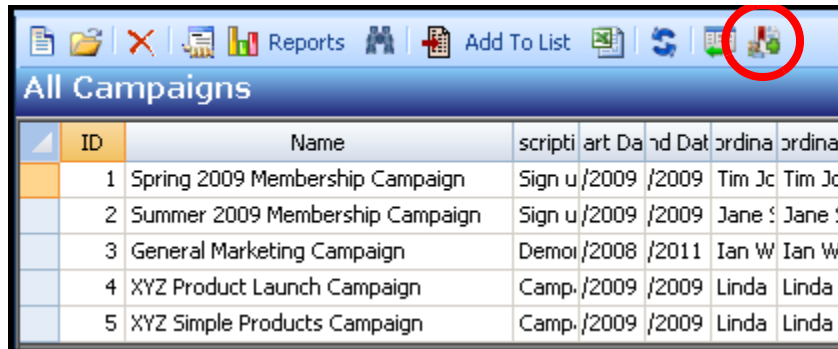
The screenshot shows a web-based form for creating a new Campaign Segment. The form is titled "New Campaign Segments Record" and has three tabs: "General", "Campaign Segment Documents", and "Attachments". The "General" tab is selected. The form contains the following fields:

- Campaign:** XYZ Campaign
- Name:** SF Student Members
- Filter Type:** View
- SQL Query:** (Empty text area)
- View:** San Francisco Student Members
- Rank:** 1

7. Click **Save**.
8. **Close** the record.

Adding Prospects from a Campaign Segment

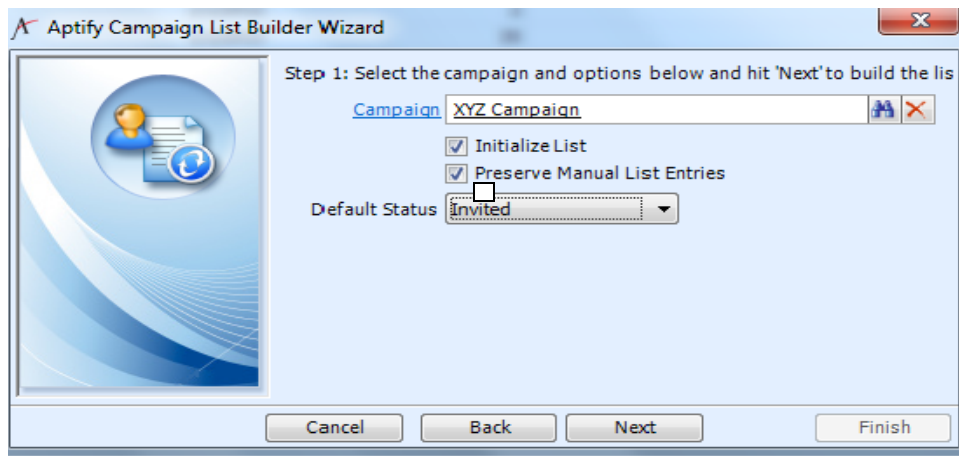
1. Open a view of the **Campaigns** service.
2. In the View Toolbar, click the **Campaign List Builder Wizard** button.



The screenshot shows a toolbar with various icons. The 'Campaign List Builder Wizard' icon, which depicts a person and a document, is circled in red. Below the toolbar is a table titled 'All Campaigns'.

ID	Name	scripti	art Da	rd Dat	ordina	ordina
1	Spring 2009 Membership Campaign	Sign u	/2009	/2009	Tim Jc	Tim Jc
2	Summer 2009 Membership Campaign	Sign u	/2009	/2009	Jane S	Jane S
3	General Marketing Campaign	Demoi	/2008	/2011	Ian W	Ian W
4	XYZ Product Launch Campaign	Camp.	/2009	/2009	Linda	Linda
5	XYZ Simple Products Campaign	Camp.	/2009	/2009	Linda	Linda

3. Click **Next** to begin the **Aptify Campaign List Builder Wizard**.
4. In the **Campaign** field, enter **XYZ Campaign**.
5. **Select** the **Initialize List** checkbox.
6. **Clear** the **Preserve Manual List Entries**. If this was left checked, the wizard would leave intact any prospects that were manually added to the list but not add any of the Segment values.
7. Select **No Response** from the **Default Status** drop-down list.



The screenshot shows the 'Aptify Campaign List Builder Wizard' dialog box. The title bar reads 'Aptify Campaign List Builder Wizard'. The main area contains the following fields and controls:

- Step 1:** Select the campaign and options below and hit 'Next' to build the list.
- Campaign:** A text box containing 'XYZ Campaign'.
- Initialize List:** A checked checkbox.
- Preserve Manual List Entries:** A checked checkbox.
- Default Status:** A drop-down menu with 'invited' selected.

At the bottom of the dialog box are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

8. Click **Next**.
9. When prompted, click **Finish** that the campaign has been built.
10. Open the **XYZ Campaign** record.
11. Review the list of **Prospects** that were added by the **Campaign Builder Wizard**.
 - Each Person from the **San Francisco Student Members** view has an entry in the **Prospect List**.

Applying a Campaign to an Order

In this exercise, users will learn how to apply a campaign to an entire order and to each individual item in an order.

Applying a Campaign to an Entire Order

1. Open the **Order Entry** Application.
2. Click on the **Orders** Service.
3. *Right click* the Service arrow, select **New Orders Record**.
4. In the **Campaign** field (left middle portion of record) enter **XYZ Campaign**.
 - When applying a single campaign to an entire order, a user **MUST** enter the Campaign first before adding products to the order.
5. In the **Ship To** field, enter **Mary Warner** (use the format: Warner, Mary).

Note that a user can use Campaign pricing with any Person; the Person does *not* need to be on the Campaign's Prospect List.

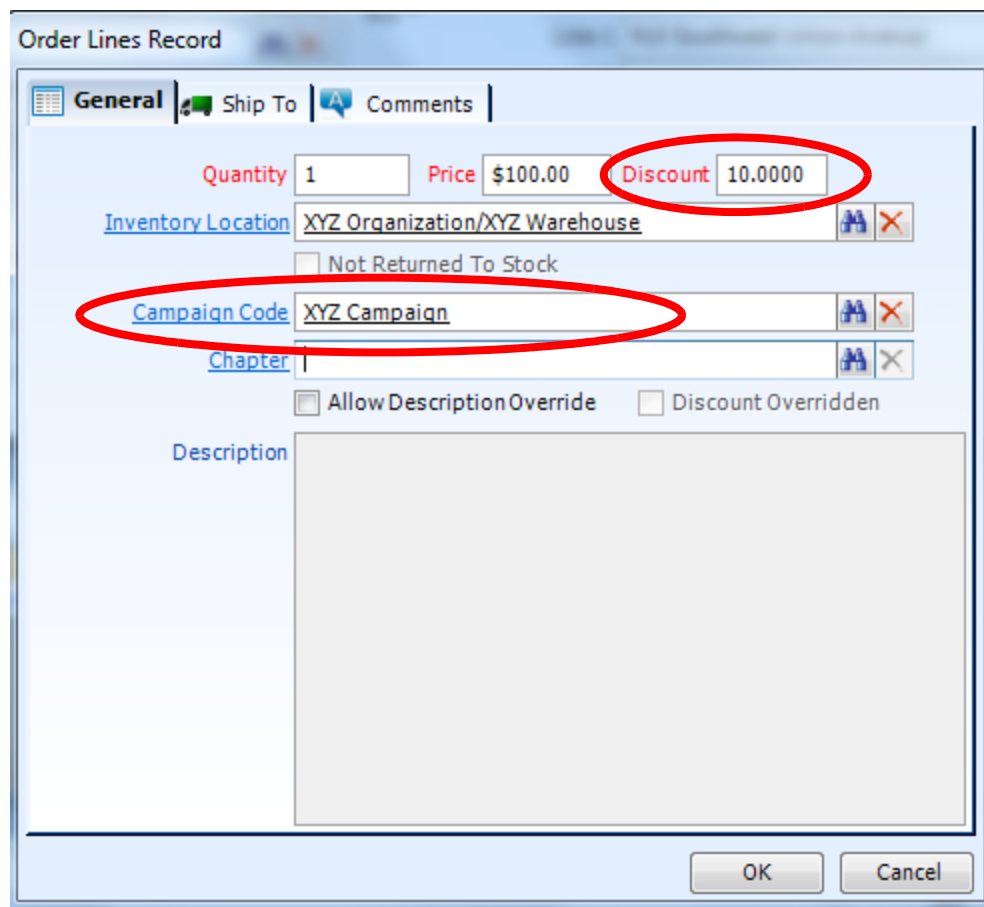
The screenshot shows the Order Entry application interface. The Campaign field is set to 'XYZ Campaign'. The Ship To field is set to 'Mary Warner'. The Lines table shows one line for 'XYZ Product' with a quantity of 1, a price of \$100.00, a discount of 10, and an extended price of \$90.00.

Line	Type	Product ID	Product	Description	Quantity	Price	Discount	Extended
1		9922	XYZ Product		1	\$100.00	10	\$90.00

6. Create an order line for **2** units of **XYZ Product**.
 - Note that the Campaign Discount is applied automatically. Since Mary Warner is a Non-Member in the example above, the discount is 10%. The specific discount rate may vary depending on the current membership status of Mary Warner and her company in the training database.
7. Click **Next**.
8. Enter payment information on the **Payment** tab.
9. **Save** the record and click **NO** when asked if the user wants to ship the order.
10. Click **Save and New**.

Applying a Campaign to Each Order Line

1. Enter a Person in the **Ship To** field. (This is the Persons record created previously).
2. Create an order line for 1 unit of **XYZ Product**.
3. Double-click a non-editable field (such as Product name) in the Order Line row to open the Order Lines record.
4. Enter **XYZ Campaign** in the **Campaign Code** field.
 - The system automatically calculates the appropriate discount percentage based on the person's and company's member type. In the example below, the person or company is a member so the discount is calculated as 20%.



The screenshot shows the 'Order Lines Record' dialog box with the following fields and values:

- Quantity:** 1
- Price:** \$100.00
- Discount:** 10.0000
- Inventory Location:** XYZ Organization/XYZ Warehouse
- Campaign Code:** XYZ Campaign
- Chapter:** |
- Description:** (Empty text area)

Red circles highlight the 'Discount' and 'Campaign Code' fields. The 'OK' and 'Cancel' buttons are visible at the bottom right.

5. Click **OK**.
6. Create an order line for 1 copy of the book called *The Sampco Way*.
7. Double-click a non-editable field (such as Product name) in the Order Line row to open the Order Lines record.

8. In the **Campaign Code** field, enter **XYZ Campaign**.
 - Notice that a discount is applied to the order line. For example, if the person and company on the order are both non-members, the discount percent is 1%. This corresponds to the \$1.50 discount for non-members specified when creating the campaign in Exercise 2. (The Order Entry system automatically calculates the percentage discount: $\$1.50/\$150.00 = 1\%$.)
9. Click **OK** to return to the order.
10. **Save** the record and click **No** when asked if the user wants to ship the order.
11. **Close** the order.

Objective.....	14.1
Using the New Meeting Wizard	14.2
Creating Meeting Registrations.....	14.11
Placing a Person on the Waiting List.....	14.13
Checking Meeting Registrants.....	14.14
Canceling a Registration.....	14.15
Closing a Meeting.....	14.17
Transferring a Meeting Registration.....	14.19

Objective

The Meetings function enables users to track meetings, meeting sessions and meeting registrants. After completing this exercise, users 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 students 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

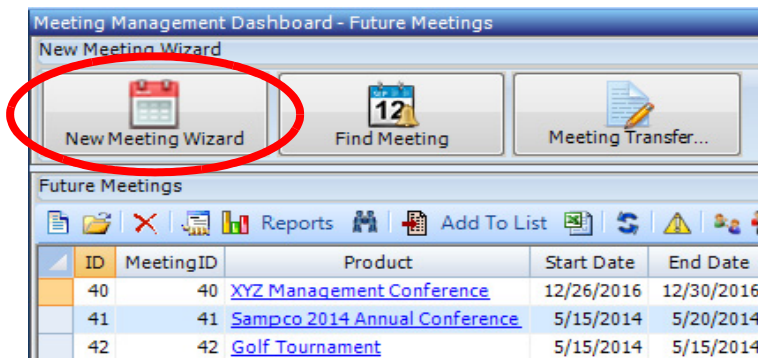
- Uses Aptify Inventory system to manage meetings with limited space
- Nearby hotels for attendees
- Meeting Location
- Required resources (such as audio/visual equipment)
- Sessions

Using the New Meeting Wizard

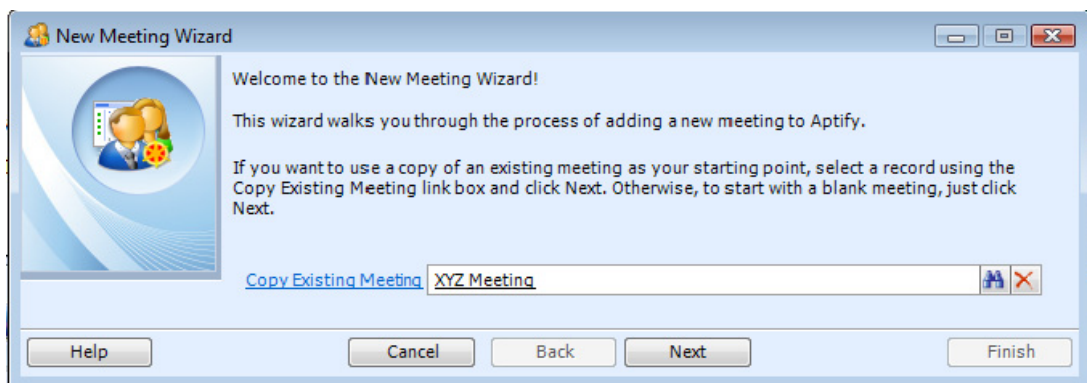
The New Meeting Wizard enables users to create a new meeting based on the information entered in an already existing meeting. This can save valuable time as Meeting coordinators often have similar meetings scheduled throughout the year that they can simply copy and then adjust details concerning such as dates, time, speakers, location, etc.

In this exercise we will use the **New Meeting Wizard** to copy an existing XYZ Meeting and make some modifications to make it unique.

1. Click on the **Meeting Management** Application.
2. Click on 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 **Tab** button. Click to Select a meeting.
6. Click the **Next** button.



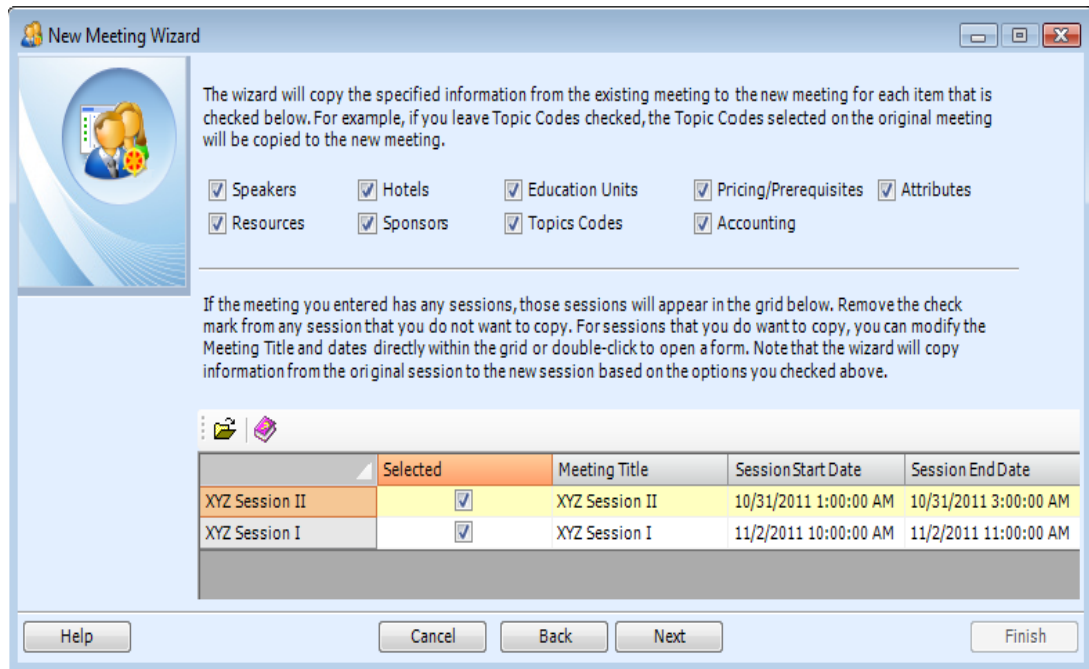
7. The second screen of the New Meeting Wizard displays.
 - On this screen users can edit the basic information concerning the meeting such as the name, date, coordinator, etc.
8. Change the **New Product Name** field to your initials plus the word Meeting (i.e. DOC Meeting).
9. Change the **Start Date 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
10. Change the **End Date and Time** to next week on Friday.
11. Click the **Next** button.

The screenshot shows the 'New Meeting Wizard' dialog box with the following fields and values:

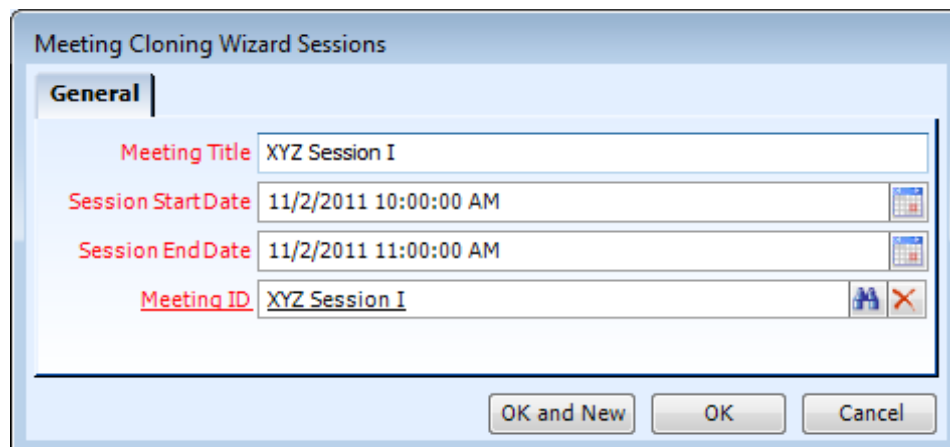
- New Product Name:** XYZ Meeting
- Other Names Same As Product Name
- New Meeting Name:** XYZ Meeting
- Category:** Meetings
- Parent Meeting:** (empty)
- Meeting Type:** (empty)
- Web Name:** XYZ Meeting
- Web Enabled
- Meeting Conflict Type:** No Conflict Validation
- Max Registrants:** 3
- Meeting Dates:**
 - Start Date and Time:** 10/31/2011
 - End Date and Time:** 11/4/2011
 - Registration Opens:** (empty)
 - Registration Closes:** (empty)
 - Rev. Rec. Date:** (empty)
- Coordinator:** John Samuels
- Organization:** (empty)
- Committee:** (empty)
- Linked Expo:** (empty)
- Description:** (empty text area)

Buttons at the bottom: Help, Cancel, Back, Next, Finish.

12. The third screen of the New Meeting Wizard displays.
 - This screen enables users to edit the Meeting Logistics and information such as Location, Sponsors, Topic Codes, etc.
13. Leave the information intact.

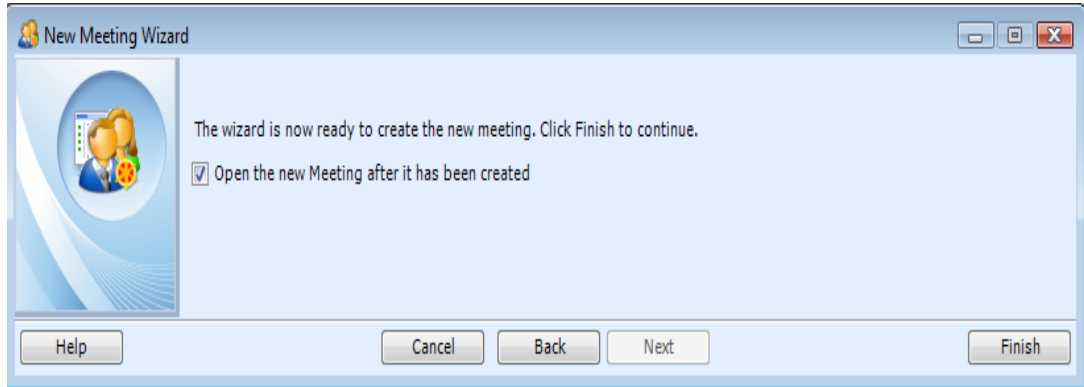


14. In the Meeting Title column, double-Click on the Meeting Title, **XYZ Session I**
15. Observe that the basic information could be edited for the **Session** at this time.
 - Observe the dates have automatically justified based on the date choices for the main meeting on Wizard screen #2.

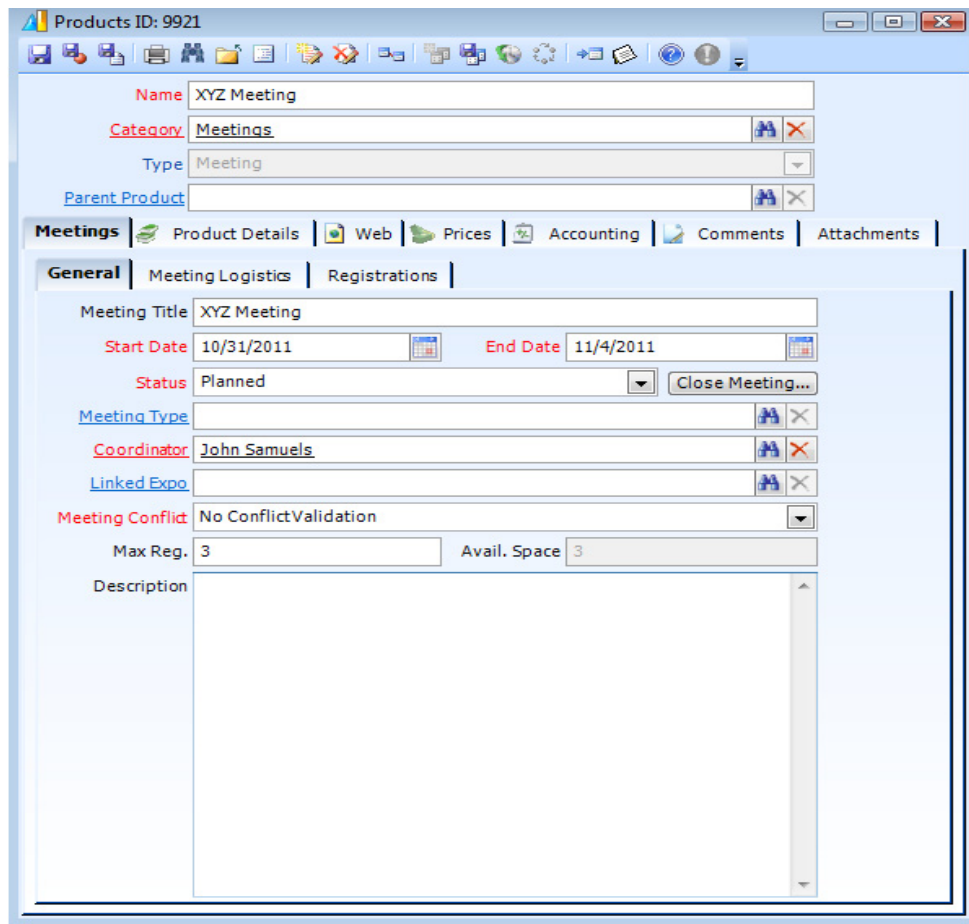


16. Click **OK**.

17. Click the **Next** button.
18. Click the **Finish** button.



19. The finished **Meeting** Product record will now display.
20. Observe the changes to the **Name** and **Date** that were made in the wizard.
21. Select the **Meeting Logistics** tab.



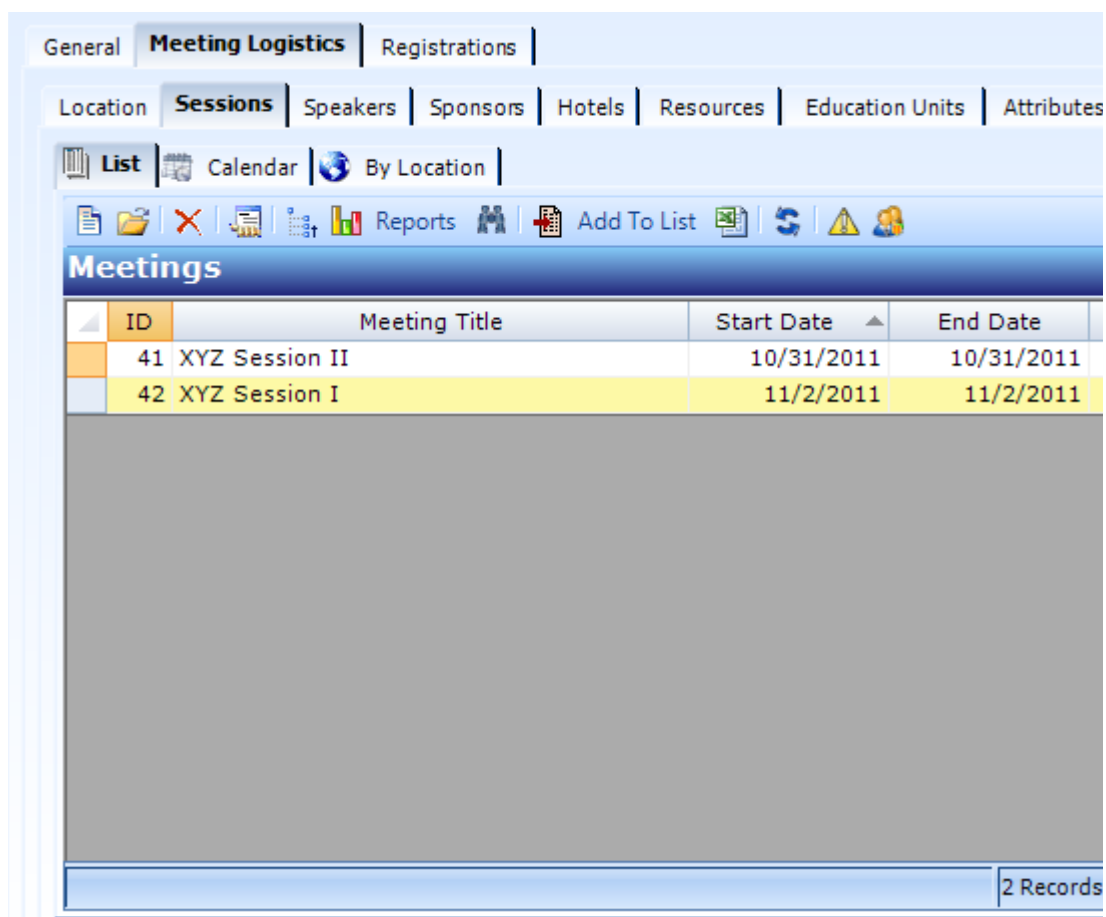
22. The **Location** tab defaults as displayed.
- The **Meeting Logistics** tab displays the information that has been stored specifically for this Meeting including the Sessions.
23. Observe the **Location** tab information.
- This tab displays information about the location of the meeting and can include room information as well.
 - Venue and Room records can be created/saved to create a database of reusable values

The screenshot shows the 'Meeting Logistics' tab with the 'Location' sub-tab selected. The form contains the following fields and values:

- Venue:** Test Venue
- Room:** Test Room
- Room Type:** Lecture Hall (dropdown)
- Capacity:** 50
- Place:** Test room / Test Venue
- Line 1:** 11 Relaxation Drive
- Line 2:** (empty)
- Line 3:** (empty)
- City, State ZIP:** Marathon, FL, 33050
- County:** Monroe
- Country:** United States (dropdown)
- Phone:** (dropdown menu)
- Phone Area Code:** 1
- Phone Number:** (empty)
- Phone Extension:** x (empty)
- Directions:** From Airport:
L on Main St. - follow 4 miles
R on Sessions Ave. - follow 400 yards
R on Relaxation Drive - 11 Relaxation

24. Select the **Sessions** tab.

25. The two sessions that carried over from the Wizard are available.
26. Double-click the **XYZ Session I** record and change the **Product Name** and **Meeting Name** to your initials.
27. **Save** and **Close** the record.
28. Double-click on the **XYZ Session II** record and change the **Product Name** and **Meeting Name** to your initials.
29. **Save** and **Close** the record.



The screenshot shows the 'Meetings' application window. The 'Meeting Logistics' tab is active, and the 'Sessions' sub-tab is selected. The interface includes a toolbar with options like 'List', 'Calendar', and 'By Location'. Below the toolbar is a table with the following data:

ID	Meeting Title	Start Date	End Date
41	XYZ Session II	10/31/2011	10/31/2011
42	XYZ Session I	11/2/2011	11/2/2011

The status bar at the bottom right indicates '2 Records'.

30. Select the **Speakers** tab.

31. The **Speaker** that was designated on the original record displays.

Speaker	Status	Type	Title	Start Date	End Date
Yukon, Dacey/Polyhedron Power Devices	Proposed	Regular	Speaker	10/31/2011	10/31/2011

1 Item

32. Double click on the **Speakers** record.

33. Change the **Start Date** to next **Monday at 9:00 AM**.

34. Change the **End Date** to next **Monday at 10:00 AM**.

General | Comments | Evaluations

Speaker: Yukon, Dacey/Polyhedron Power Devices

Status: Proposed

Type: Regular

Title: Speaker

Description:

Start Date: 12/26/2011 9:00:00 AM

End Date: 12/26/2011 11:00:00 AM

Evaluation: Average

Content Quality: Average

Speaker Quality: Average

Cost: \$0.00

Date Rejection Sent:

Reimburse Speaker

Max Expenses: \$0.00

OK and New OK Cancel

35. Click the **OK** button.

36. Select the **Sponsors** tab.
37. **Sponsors** can be added, edited, and deleted as needed.

Sponsor	Contact	Amount
Ottoman	Lambert, Baka/Ottoman	\$1,000.00

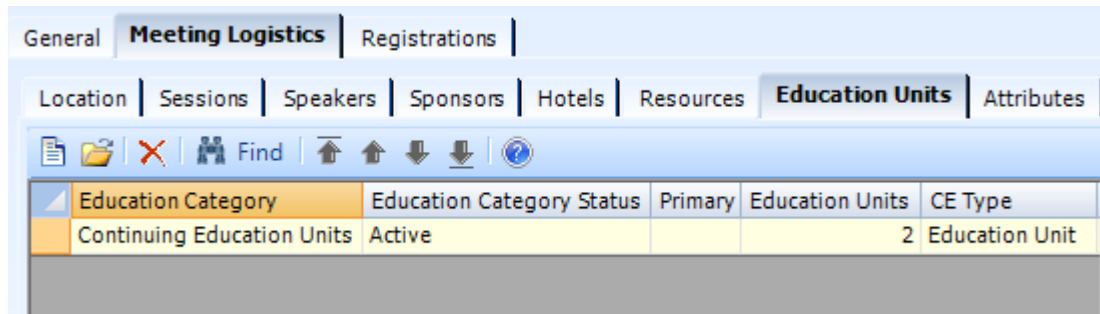
38. Select the **Hotels** tab.
39. **Hotels** and their locations, offers and directions can be added, edited, and deleted as needed.

Hotel	Special Offering	Offer Start Date	Offer End Date
Marriot - Marathon Key	20 % off total stay	10/31/2011	11/4/2011

40. Select the **Resources** tab.
41. **Resources** and their types, quantity, start and end dates can be added, edited, and deleted as needed.

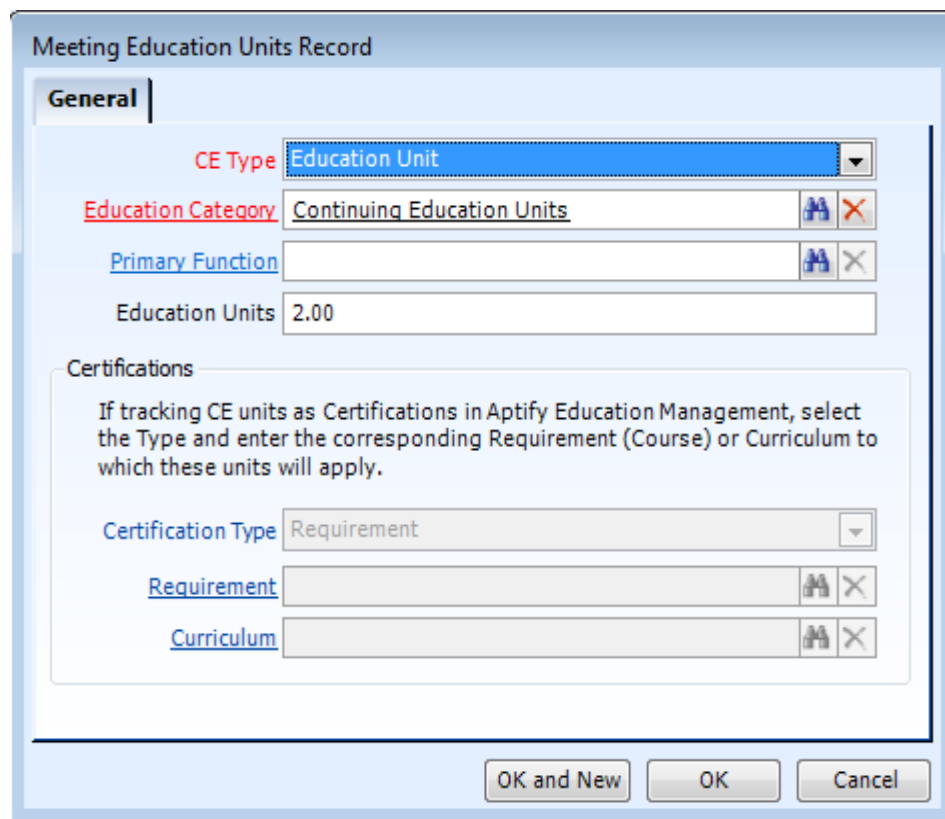
Resource	Checked	Double Checked	Quantity	Start Date	End Date
Podium	<input type="checkbox"/>	<input type="checkbox"/>	1	10/31/2011	11/4/2011
White Board	<input type="checkbox"/>	<input type="checkbox"/>	1	10/31/2011	11/4/2011

42. Select the **Education Units** tab.
43. **Education Categories** can be set up to track how many **Continuing Education Units** an attendee will receive for attending a particular meeting.
44. Double click on the **Continuing Education Units** line.



Education Category	Education Category Status	Primary	Education Units	CE Type
Continuing Education Units	Active		2	Education Unit

45. The **Meeting Education Units Record** displays.
46. These records can be added and edited to fit the class requirements.



Meeting Education Units Record

General

CE Type: Education Unit

Education Category: Continuing Education Units

Primary Function:

Education Units: 2.00

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

Requirement:

Curriculum:

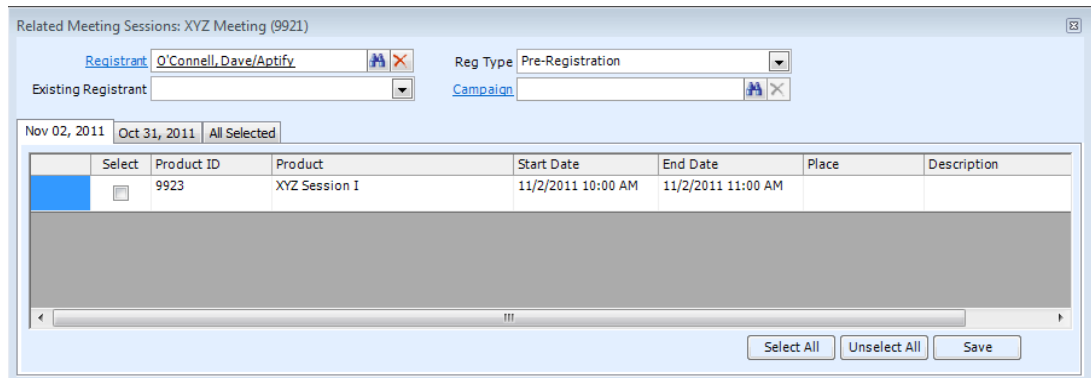
OK and New OK Cancel

47. 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.
48. Click **OK** on the **Meeting Education Units** record.
49. **Save and Close** the Meeting record.

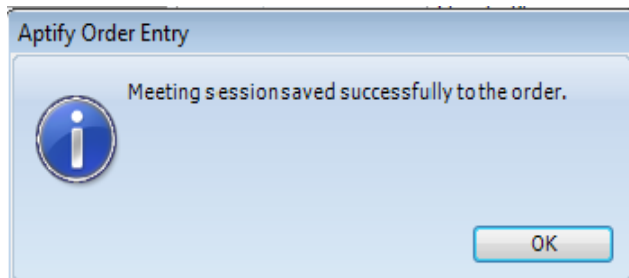
Creating Meeting Registrations

In this exercise, a user will order three of the XYZ Meeting products just created so that a user can register three separate individuals for that meeting (your Person and IDs #1 and #2). A user will also order the associated sessions for just your Persons record.

1. Click the **Order Entry** dashboard.
2. Click the **New Order Wizard** button. Enter a Persons' information for Ship To.
3. Add **XYZ Meeting** to the Order Line.
4. When a user **Adds** the product, a pop up window will display with **Registration** and **Session** information.
 - The auto-pop up of the Order Line/Registration information can be enabled at the Product level on a per **Product** or per **Category** level.
5. Check the box next to **XYZ Session I**.
6. Select the **Dec. 28 20xx** tab.
7. Check the box next to **XYZ Session II**.
8. Click the **Save** button.



9. On the success message, Click **OK**.



10. DO NOT close the Pop up window
11. Observe BOTH the **Meeting** product and each of the **Sessions** have been added as Registrations to the Order Lines.

Line	Type	Product ID	Product	Description	Quantity
1		9916	XYZ Meeting	Registration for Dave O'Connell	1
2		9917	XYZ Session I	Registration for Dave O'Connell	1
3		9918	XYZ Session II	Registration for Dave O'Connell	1

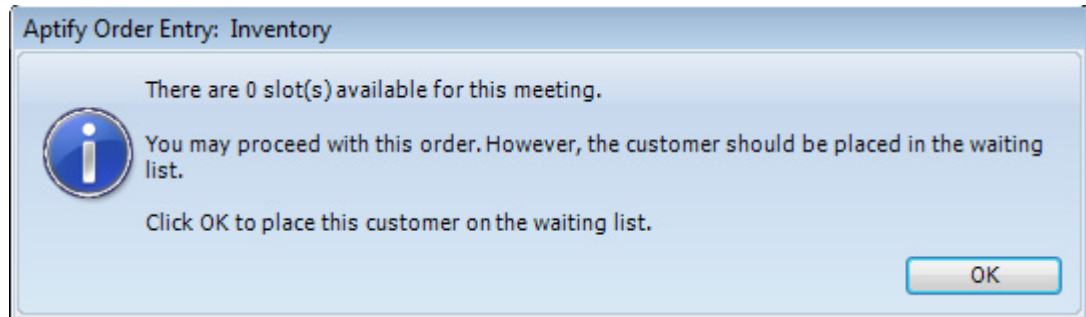
12. In the **Pop up** window, delete your name from the **Registrant** field.
13. Enter **ID #1** (Aiesha Baldwin)
 - This will now register a second person from this Pop Up window
14. **Clear** the two **Sessions**; to only register Aiesha for the Main Meeting.
15. Click the **Save** button.
16. On the **Success** pop up, click **OK**.
17. Repeat **steps 11-15** for **ID #2** (Alexandra Wade).
18. **Close** the Pop up window (x in upper right).
19. Observe the complete **Order Lines**:

Line	Type	Product ID	Product	Description	Quantity
1		9921	XYZ Meeting	Registration for Dave O'Connell	1
2		9923	XYZ Session I	Registration for Dave O'Connell	1
3		9922	XYZ Session II	Registration for Dave O'Connell	1
4		9921	XYZ Meeting	Registration for Aiesha Baldwin	1
5		9921	XYZ Meeting	Registration for Alexandra Wade	1

20. Enter the **Payment** at the bottom of the screen using the saved **Credit Card**.
21. Click **Save** and **Close**.
22. Click **Yes** when asked if the user wants to ship the order.

Placing a Person on the Waiting List

1. Open a new order from the **New Order Wizard** using **ID #3** (Athena Scott).
2. Order **one** of the **XYZ Annual Meeting**. Click **Add**.
3. On the **Waiting List Warning** Pop up, click **OK**.



4. The **Registration** Pop up will display.
5. Click **Save**.
6. Click **OK**.
7. Enter a **Payment** with a **Pre-Paid Check** number of **1234**.
8. Click **Save**.
9. Click **Save** and **Close**.
10. Click **No** when asked if the user wants to ship the order.
 - The order can not ship since the meeting lacks sufficient inventory.
 - The order will remain in a **Taken** status.

Checking Meeting Registrants

1. Click the **Meeting Management** dashboard.
2. Observe the **Registration By Count** dashboard View.
 - Shows registrations by Meeting
 - Shows registrations by Session

The screenshot shows a software interface with a 'FolderList' on the left and a main window titled 'Meeting Management - Global'. The main window contains a 'Meeting Buttons' section with a 'New Meeting Wizard' button. Below this is a section titled 'Registration Count By Meeting (For Next 30 Days)' which contains a table. The table has columns for Meeting Title, Order ID, Quantity, and Attendee Name. The data is as follows:

Meeting Title	Order ID	Quantity	Attendee Name
XYZ Meeting	9862	1	O'Connell, Dave/Aptify
	9862	1	Baldwin, Aiesha/Danube Partners
	9862	1	Wade, Alexandra/U. Hardwick Physics AB
	9863	1	Scott, Athena/Akebono Cryogenics Incorporated
# Attendees		4	
XYZ Session I	9862	1	O'Connell, Dave/Aptify
	# Attendees		1
XYZ Session II	9862	1	O'Connell, Dave/Aptify
	# Attendees		1

3. Expand the **Meeting Management** application (if not already expanded).
4. Expand the **Meetings** service.
5. Run the pre-loaded **Wait List** prompted view.
6. Observe the results; **Athena Scott** should display.

NOTE: These are just two of multiple methods to find and see this information.

Canceling 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 the second person ordered for a Meeting registration.

1. Open the view titled, **Orders Over the Last 30 Days**.
2. Identify and highlight the **Order ID** that has three **XYZ Meeting Registrations**.
3. Launch the **Order Cancellation Wizard** (top of the view)
4. Enter the **Cancellation Reason**.
5. Click **Next**.
6. The Cancellation wizard displays all order lines.
7. Check the box to the left of the order line for the **Alexandra Wade**.
8. Click **Next** to continue.

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.

Line	Product ID	Product	Description	Extended	Quantity	Cancel Quantity
<input type="checkbox"/>	1	9921 XYZ Meeting	Registration for Dave O'Connell	\$200.00	1.0000	0
<input type="checkbox"/>	2	9923 XYZ Session I	Registration for Dave O'Connell	\$75.00	1.0000	0
<input type="checkbox"/>	3	9922 XYZ Session II	Registration for Dave O'Connell	\$150.00	1.0000	0
<input type="checkbox"/>	4	9921 XYZ Meeting	Registration for AieshaBaldwin	\$200.00	1.0000	0
<input checked="" type="checkbox"/>	5	9921 XYZ Meeting	Registration for Alexandra Wade	\$200.00	1.0000	1.0000

Return Shipping Charge

Include Cancellation Fee Product

Product:

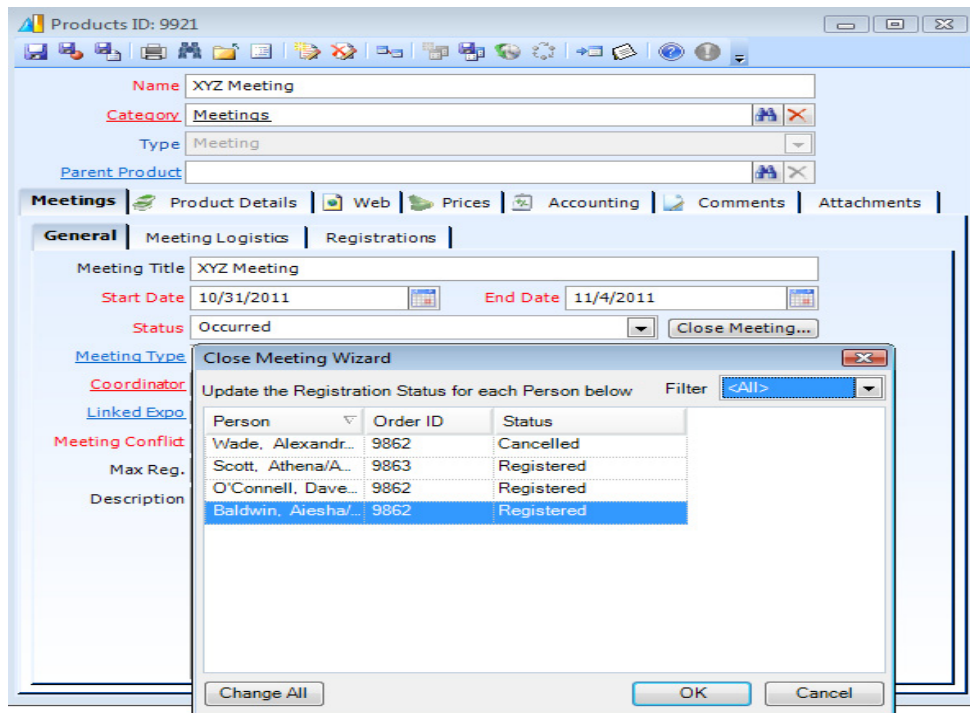
Fee:

9. Select **Keep On Account** and click **Next** to continue.
10. Click **Finish** to generate the cancellation order.
11. Click **Yes** when prompted to open the cancellation order.
12. Change the **Order Status** to **Shipped**.
13. Select **Yes** when asked if all items have shipped.
14. **Save** and **Close** the cancellation order.
15. Click **No** when asked if the user wants to process another cancellation.
16. Open the **Person** record for **Athena Scott**.
17. Select the **Orders** tab.

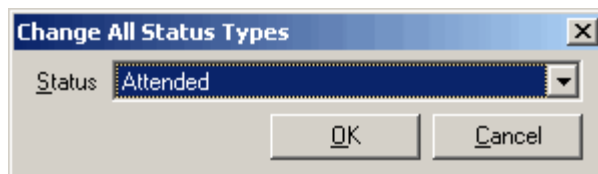
18. Open the order for the **XYZ Meeting**.
19. Click on the order line.
20. Select the **Meetings** tab.
21. Change the **Status** from **Waiting** to **Registered**.
22. Click **OK**.
23. Change the **Order Status** from **Taken** to **Shipped**. Click **Yes** when asked if all items have been shipped.
24. **Save and Close** the record.
25. Open the **Meetings** record (if not already open).
26. Confirm that the person has been moved from the **Wait List** tab to the **Registrants** tab on the Meeting Product.

Closing a Meeting

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.
5. From the **Filter** drop-down list, select **Registered**.
 - This displays only the meeting's Registrants.
6. For the first entry, click the **Status** field and select **Attended** from the drop-down list.
 - This method can be used to change the Status for each Person individually.



7. Click the **Change All** button.
8. From the **Status** drop-down list, select **Attended**.



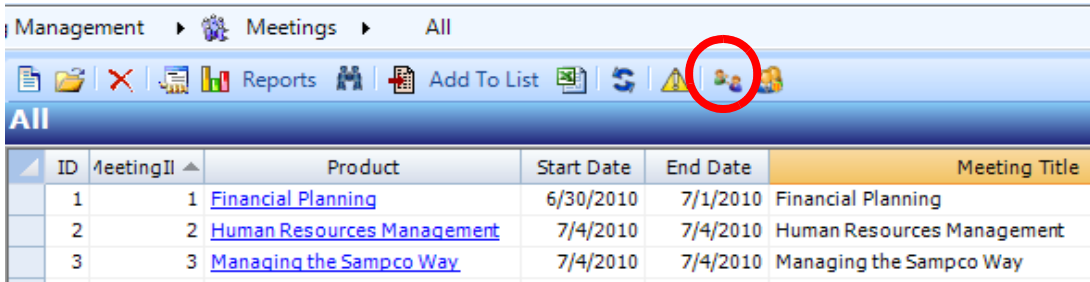
9. Click **OK**.
 - The **Status** changes to **Attended** for all Persons in the list.
10. Click **OK** to close the **Close Meeting Wizard**.
11. Click **OK** to update all **Registrant** information.
12. Select the **Attendees** tab.
 - Confirm that all three registrants are now listed under the Attendees tab.
13. Click **Save and Close** to close the **Meetings** record.

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

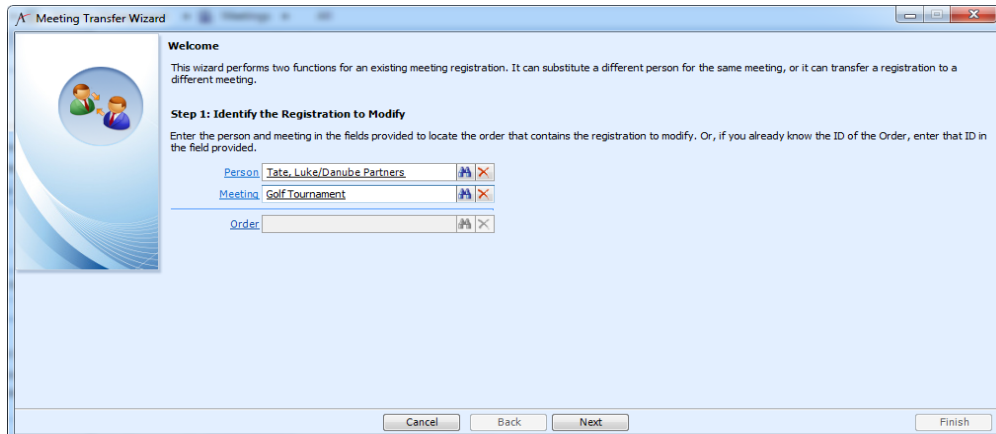
1. Create an **Order** for the Golf Meeting (**ID 9927**).
2. **Save and Ship** the Order.
3. Open up a View of **All Meetings** (may need to create).
4. Click on the **Meeting Transfer Wizard** button.



ID	MeetingID	Product	Start Date	End Date	Meeting Title
1	1	Financial Planning	6/30/2010	7/1/2010	Financial Planning
2	2	Human Resources Management	7/4/2010	7/4/2010	Human Resources Management
3	3	Managing the Sampco Way	7/4/2010	7/4/2010	Managing the Sampco Way

5. Enter your **Persons** name in the **Persons** field.
6. Enter the **Golf Meeting (ID 9927)** in the **Meeting** field.

Note: If a user remembers the **Order ID**, they can put that in the Order field without filling out the Person or Meeting fields.



Welcome
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:

Buttons: Cancel, Back, Next, Finish

7. Click the **Next** button.

8. Enter **Aiesha Baldwin (ID #1)** in the **New Attendee** field.
9. Enter the **Golf Meeting (ID 9927)** in the **New Meeting** field.
10. Select the **Line 1** box.

11. Click the **Transfer** button.
12. Click the **Next** button.
13. Click **OK** at the **Credit Card/Credit Memo** message.
14. Click the **Next** button.
15. 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

16. Click **Next**.
17. Click **Finish**.
18. Click **Yes** at next 2 **Ship** screens; user shipping both **Transfer** and **Cancellation** Orders.
19. Click **No** to sign up other Sessions.
20. Click **No** to Transfer another Person.

Intro to Aptify's Web Interface

Objective.....	15.1
Spaces	15.3
Use Spaces to Create a Contact Log.....	15.5
Global Search	15.7
Search for a Persons Record.....	15.9
Navigating Persons Records.....	15.10
Order a Membership.....	15.12
Access a View.....	15.14
Summary.....	15.16

Objective

Aptify web interface allows users to access most Aptify functions through a web browser such as Google Chrome. In addition, it provides many new features that make using Aptify even easier than with the Aptify Desktop client.

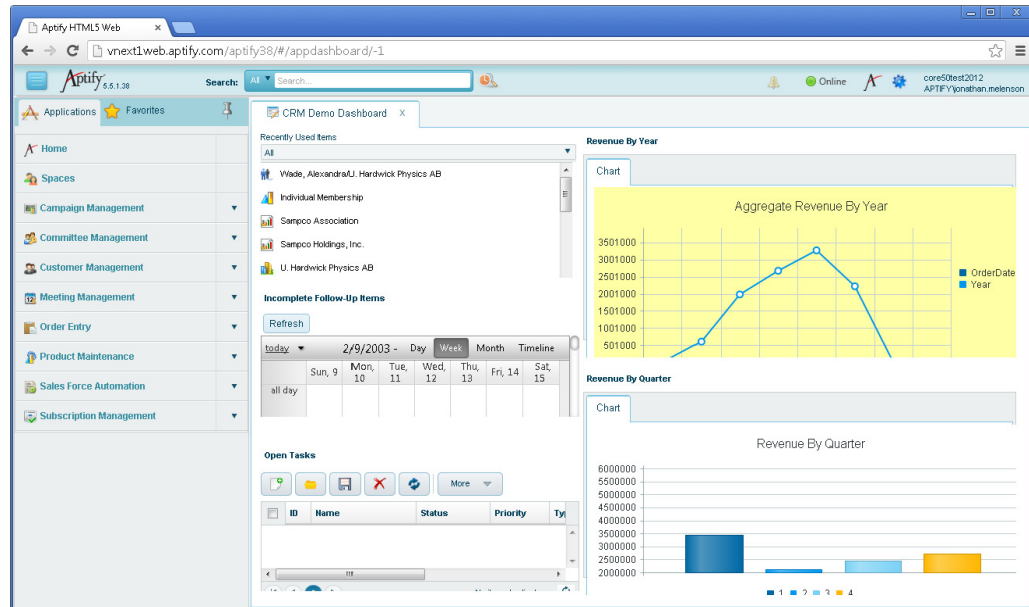
In this chapter, you will learn:

- How “Spaces” can be used to quickly perform common tasks and share information
- How Global search can locate views and records across the entire Aptify system
- How to create a new Persons record and place an order for that person

Overview

Aptify web interface uses HTML5 web-technology to provide users with Aptify access from any device with a web browser and internet connection.

Figure 15.1
Aptify web
interface
Dashboard

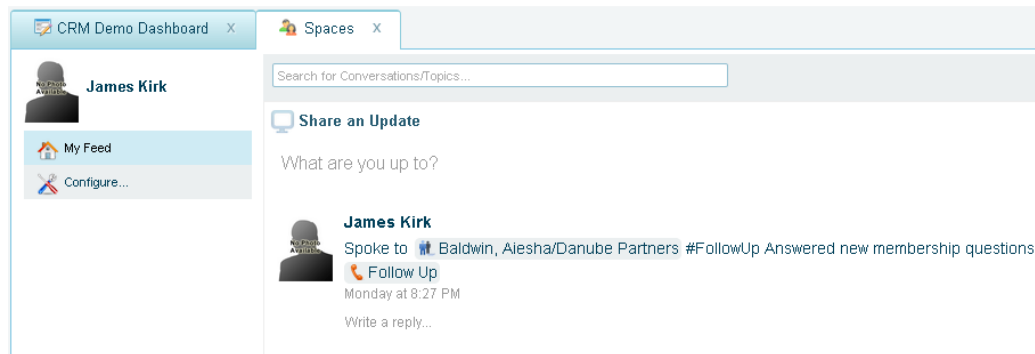


This includes desktop computers, laptops, tablets, or other mobile devices, such as phones. In addition, if a user ever loses internet connectivity, the interface automatically saves the last changes the user made and synchronizes with the Aptify database once the network connection is restored.

Spaces

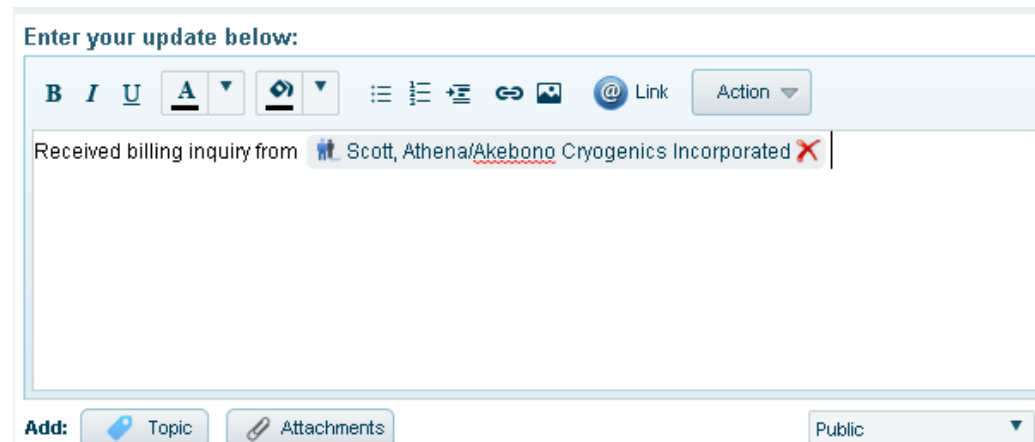
“Spaces” in Aptify web interface are the equivalent of a social media newsfeed, where users can see other users’ most recent Aptify activity, as well as post their own updates.

Figure 15.2
Aptify web
interface
Spaces



Spaces also function as a gateway for users to quickly perform common functions, including creating Contact Logs, assigning Tasks, and updating records. Users can even link directly to specific records from within a post, which can save users time locating specific data.

Figure 15.3
Linking to
Records in
Spaces



In addition, users can configure their Spaces to notify them if certain events occur. For instance, a user may wish to be notified if their corresponding Persons record is included in another user’s post. Notifications appear as an Alert icon with a red box, which indicates the number of events that are unviewed.

Figure 15.4
Alert
Notification
Icon



Clicking the alert icon displays a drop-down list where the user can select one of the alerts to view the corresponding post. Once the post has been selected, it disappears from the alert list.

Figure 15.5
Viewing
Spaces
Notifications



Use Spaces to Create a Contact Log

In this exercise, use a Spaces post to create a Contact Log record and link to the Persons listed in the contact log.

1. Double-click the **Aptify web interface shortcut** on the desktop.
 - A prompt asking for your user name and password appears.
 - This information has already been entered and saved on the training computer.
 - Normally, if using Windows Integrated Security, you would enter your **Windows login credentials**.
2. Click **Log In**.
3. From the Dashboard, click the **Spaces** tab.
4. Click inside the white text box that reads “What are you up to?”
 - An HTML window appears.

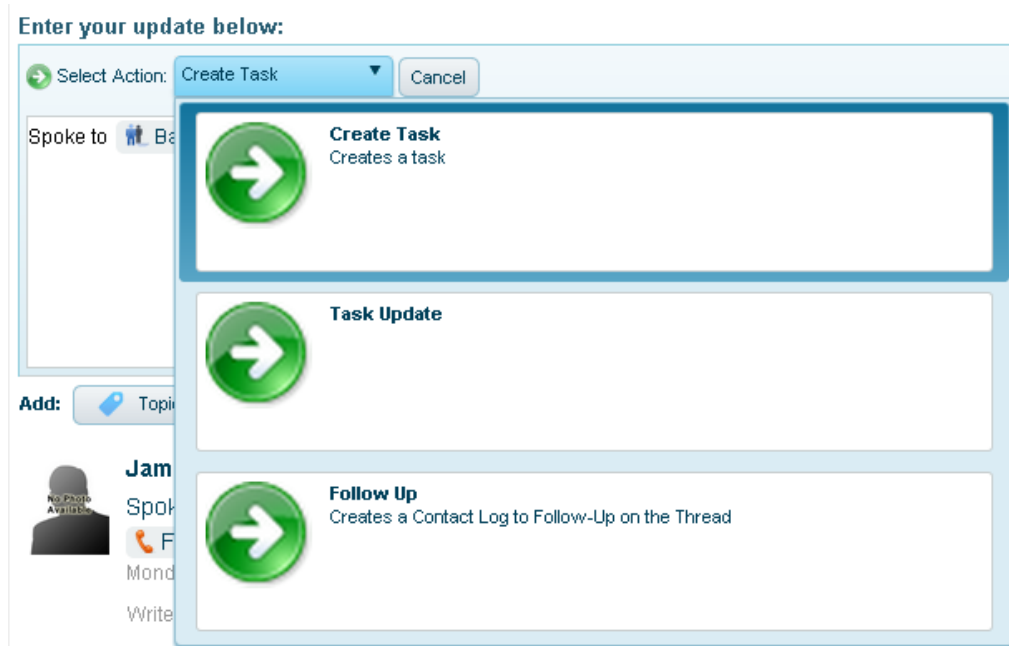
Figure 15.6
Creating a
Spaces Post

5. Enter **Spoke to @** in the window.
 - As soon as the @ symbol is entered, a search record text box appears.
 - Users can also click the **@ Link** button to access the search.
6. Enter **Baldwin, Aiesha** in the search box.
 - A list of matches appears as you type.

Figure 15.7
Spaces Search
Results

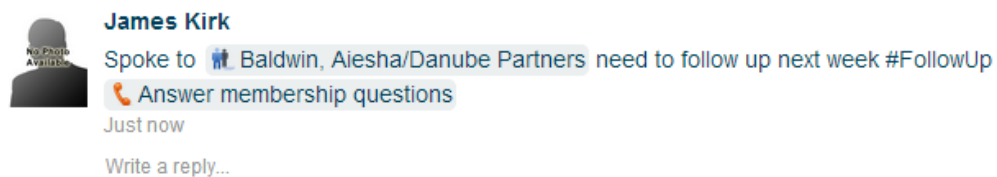
7. Click the **Aiesha Baldwin** result to add it to the post.
8. Enter **need to follow up next week #**.
 - As soon as the # symbol is entered, a list of actions appears.
 - Users can also click the **Action** button to access the list.

Figure 15.8
Creating a
Follow Up



9. Click the **Calendar button** and select next Monday as the follow up date.
10. Enter **Answer membership questions** in the **Description** text box, then click **Update**.
 - The new spaces record appears with a link to both Aiesha Baldwin's record and a Contact Log of the scheduled follow up event.

Figure 15.9
Spaces Post



Global Search

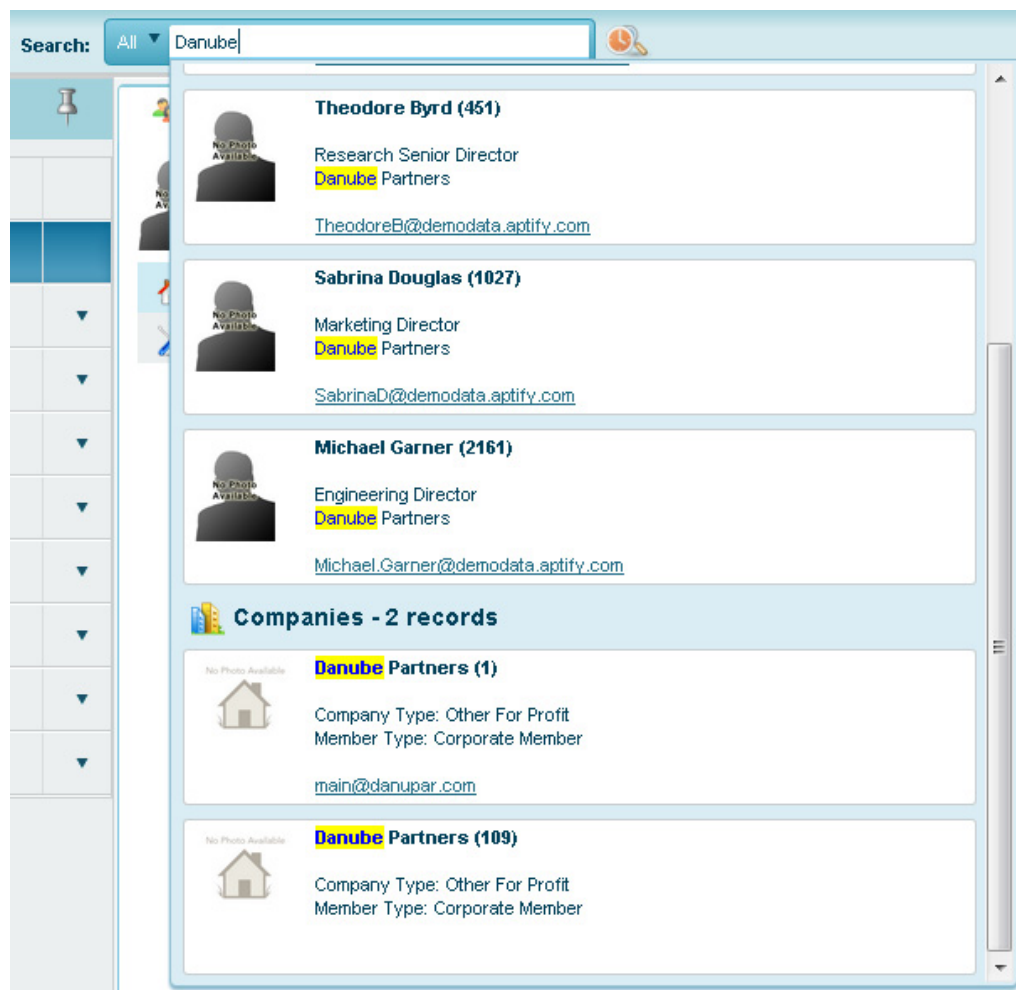
In the Aptify Desktop client, users must navigate to a service to search for a specific kind of record; to find Aiesha Baldwin's Persons record, a user would run the find dialog from the Persons service, and the results would only include Persons records. However, Aptify web interface significantly improves search functionality with a Global Search that allows users to locate records from multiple services. By default, these services include Persons, Companies, and Views, but Global Search can be configured to include any service.

Figure 15.10
Global Search Bar



Typing Danube, for instance, could bring up a list of not only Persons who work for Danube Partners, but also any Companies, Orders, or other records that matched, with the results being grouped by record type.

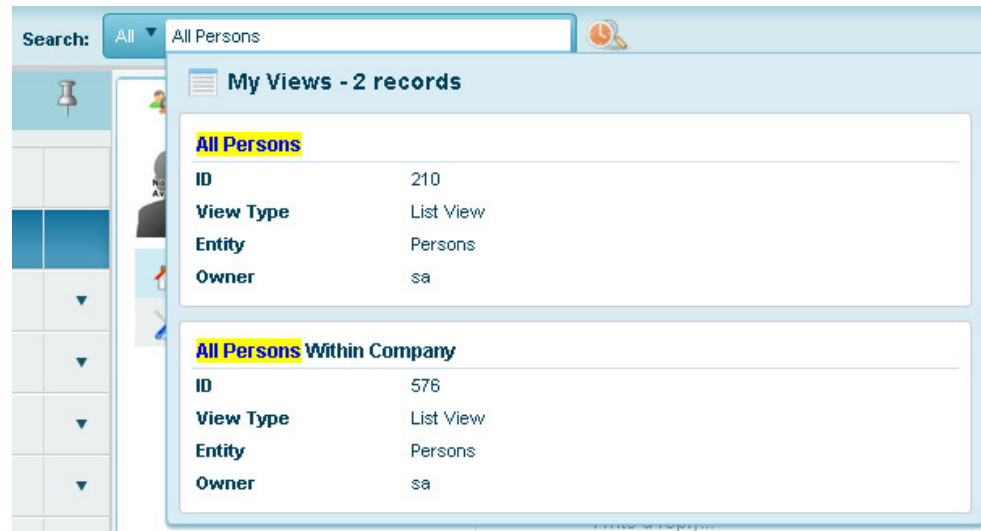
Figure 15.11
Global Search Results



Similarly, searching for a person might bring up the Persons record in addition to their associated Orders and Contact Logs.

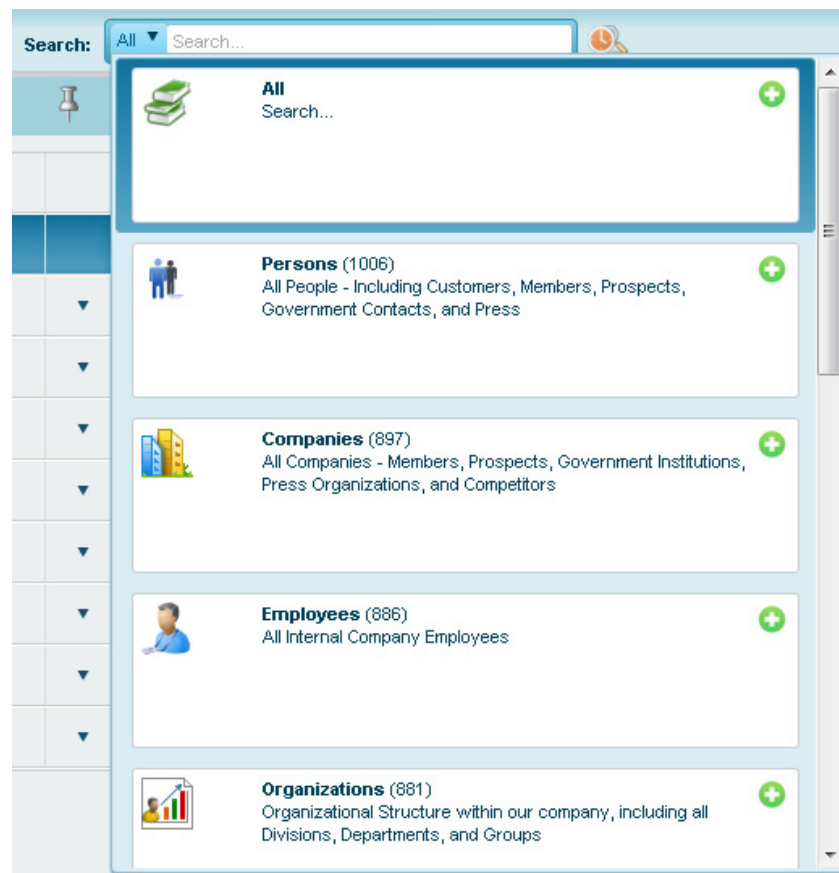
Global search also enables users to search for views. Typing in a name of a view locates any matching views that contain the search term. This makes it easy to quickly navigate Aptify and find any data needed.

Figure 15.12
Global Search
View Results



Finally, be aware that users can see their search history by clicking the Clock/Magnifying Glass next to the Search Bar, and can search only within a specific Service by first clicking the drop-down arrow next to the search bar, then selecting the desired service.

Figure 15.13
Global Search
Service
Selection



Search for a Persons Record

In this exercise, use the Global Search feature to locate Aiesha Baldwin's Persons record by searching for her Company, Danube Partners. Then, search again to find the Danube Partners' Companies record.

1. Click in the **search bar** at the top of the screen and enter **Danube Partners**.
 - A list of results containing both Persons who work for Danube Partners, and Companies records, appears.
2. Select **Aiesha Baldwin** to open her Persons record.
3. Click the **X** on Aiesha Baldwin's Persons record's tab to close her record and return to the dashboard.
4. Click the **arrow** next to the **search bar** to open a drop-down list.
5. Select **Companies** to search only within the Companies service.
6. Click in the **search bar** and enter **Danube Partners**.
 - A list of results appears.

Figure 15.14
Global Search
Company
Results

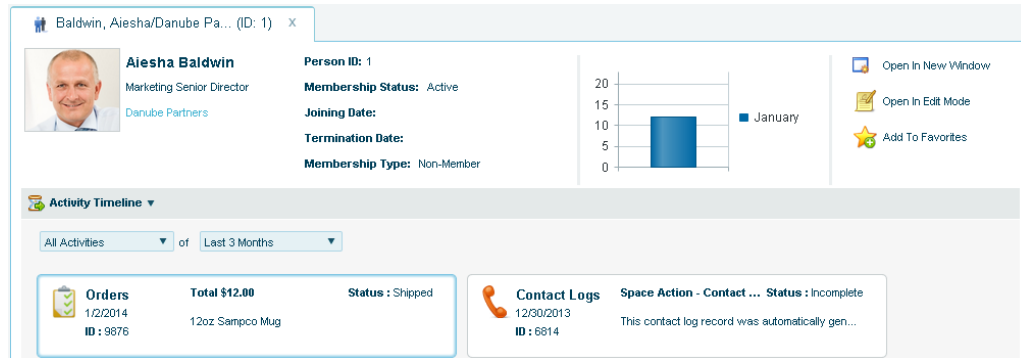


7. Select the first **Danube Partners** Companies record to open it.

Navigating Persons Records

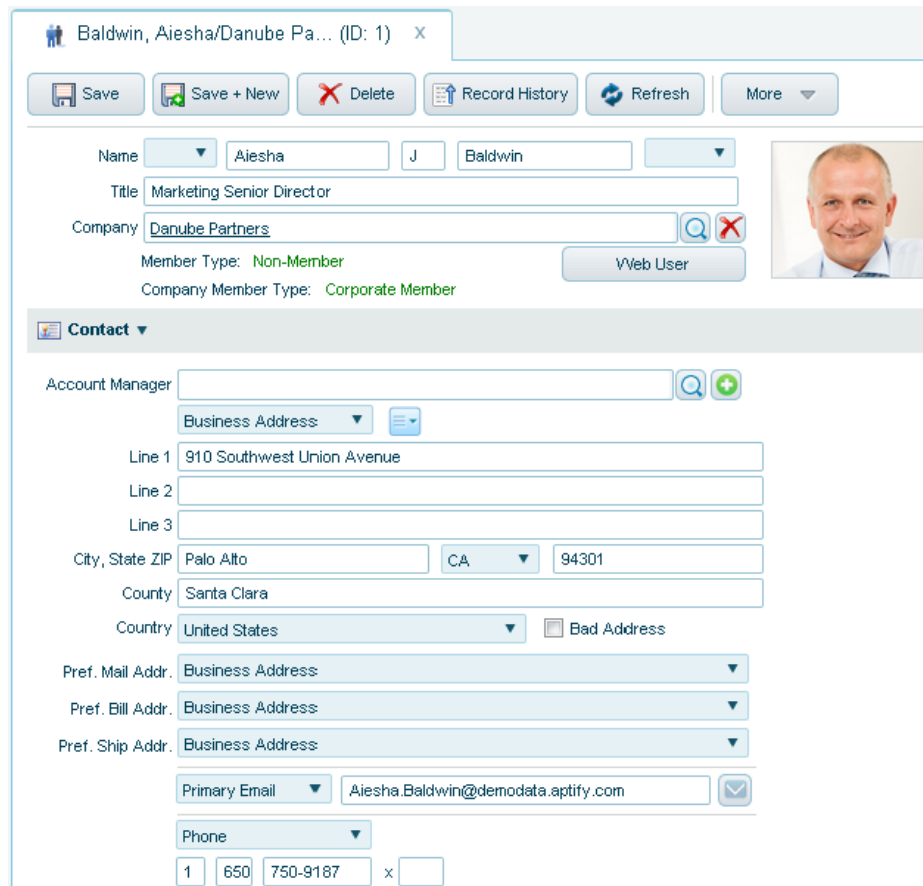
When a Persons record is first opened in the interface, a summary of the person's key information is shown. This includes their membership status, a headshot photograph, and an activity summary, which lists events such as orders and contact logs.

Figure 15.15
Persons
Record



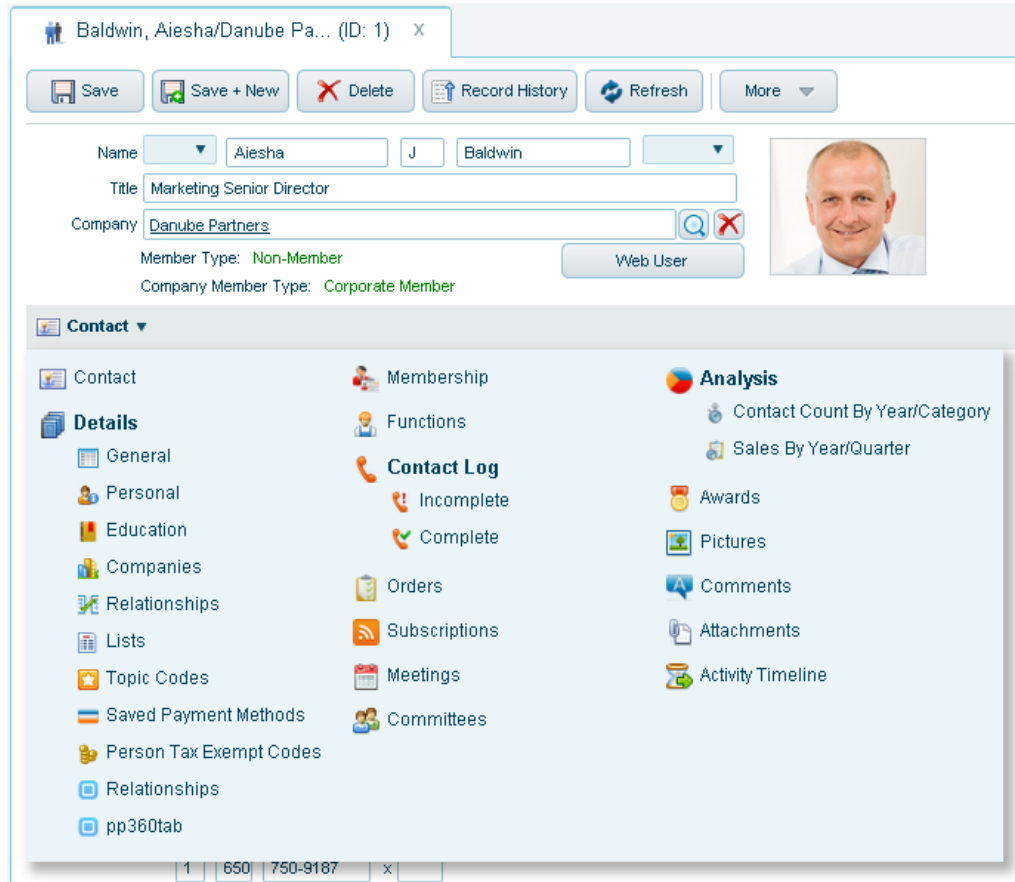
To view the rest of a Person record's information, a user must first click Open In Edit Mode to the right of the summary data. From there, the user can see and edit the rest of the record's details. Note that in Aptify web interface, records are organized using a drop-down list, rather than tabs as with the Aptify Desktop client.

Figure 15.16
Person Record
Edit Mode



To see the various types of information, such as related Orders or Committees, click the arrow next to the Contact header, then select a category.

Figure 15.17
Person Tab
Selection



Order a Membership

In this exercise, locate Aiesha Baldwin's Persons record, then open the record in Edit Mode to place an order for an Individual Membership.

1. Click the **arrow** next to the **search bar** and select **Persons**.
2. Click in the **search bar** and enter **1**.
 - This the ID for Aiesha Baldwin's Persons record.
3. Select **Aiesha Baldwin's** record from the list of results.
4. Click **Open In Edit Mode**.
 - This displays additional Person information and allows the record to be modified.
5. Click the arrow next to Contact.
 - A list of options, corresponding to record tabs in the Aptify Desktop client, appears.
6. Select **Orders**.

Figure 15.18
Persons
Orders Tab

The screenshot shows the 'Orders' tab for Aiesha Baldwin. At the top, there are two summary boxes: 'Order Total \$537.00' and 'Balance Total \$525.00'. Below this is a section titled 'Orders for Aiesha Baldwin' with a toolbar containing icons for adding, deleting, and refreshing records, along with a 'More' dropdown menu. A table lists the orders:

	ID	Order Date	Line1_ProductName	Grand Total	Balance	Order Status
▶	4286	03/30/2010 09:23:45 PM	Individual Membership	\$525.00	\$525.00	Taken
▶	9876	01/02/2014	12oz Sampco Mug	\$12.00	\$0.00	Shipped

At the bottom of the table, there are navigation controls (back, forward, refresh) and a page indicator '1 - 2 of 2 items'.

7. Under **Orders for Aiesha Baldwin**, click **New Record**.

8. Click in the **Find Product** field, enter **Individual Membership**, and click **Add**.
 - The product appears on the order line.

Figure 15.19
Adding a
Product to an
Order

Order Entry-Baldwin, Aiesha/Danube Partners

Customer

Order Date: 1/6/14

Ship To: Baldwin, Aiesha/Danube Partners

Ship To Company: Danube Partners

Billing Same as Shipping

Bill To: Baldwin, Aiesha/Danube Partners

Bill To Company: Danube Partners

Customer Type: Corporate Member/Not Available

Campaign: [Search]

Ship Type: U.S. Mail

Order Source: Walk-In

Order Addresses

Ship To Address

Line 1: 910 Southwest Union Avenue

Line 2: [Empty]

Line 3: [Empty]

City, State ZIP: Palo Alto CA 94301

County: Santa Clara

Country: United States Bad Address

Ship To Phone: 1 650 750-9187 x [Empty]

Payment & Summary Order Total: \$250.00

Find Product... Quantity 1 Qty Avail: [Add] [Clear Search] [Delete All]

Individual Membership (ID: 2)	Description	Quantity	Price	Discount	Extended	Actions
Individual Sub: 1. Start: (2) # Copies:...		1	\$250.00	0.00 %	\$250.00	[Edit] [Open] [Delete]

9. Click the **Payment & Summary** heading to expand the payment area.
10. Click in the **PO Number** field and enter **123456**.

Figure 15.20
Entering Order
Payment
Information

Payment & Summary Order Total: \$250.00

Order Type: Regular Order Status: Taken

Payment Type: Purchase Order Initial Payment Amount: \$250.00

PO Number: 123456 Cash Control: [Search]

Terms: [Empty] Payment Schedule Type: None

Due Date: [Calendar] Currency Type: US Dollar Order Level: Regular

Order Totals	
Sub-Total	\$250.00
Shipping	\$0.00
Handling	\$0.00
Tax	\$0.00
Total	\$250.00
Balance	\$250.00

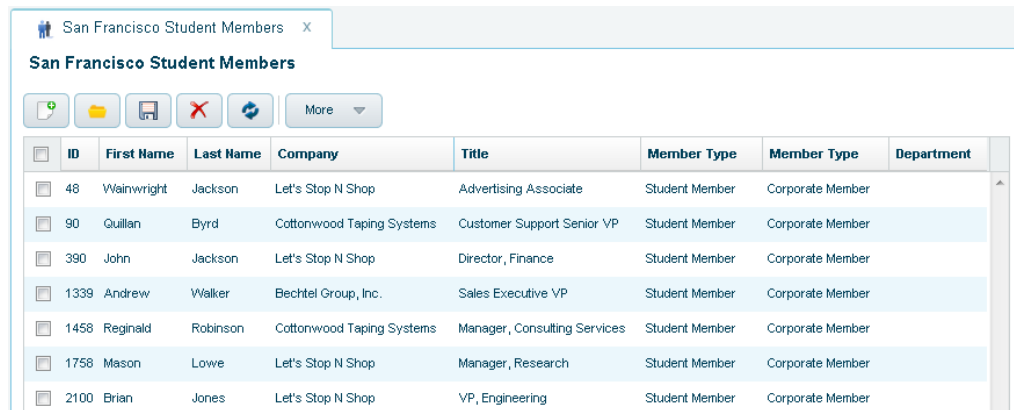
11. Click **Save**.
12. Click **Wade/Alexandra** in the **Ship To** field to return to her record.
13. Click **Refresh**.
 - Observe Alexandra Wade is now a Corporate Member.

Access a View

In this exercise, search for and open the San Francisco Student Members view created in the Views chapter.

1. Click in the **search bar** at the top of the screen and enter **San Francisco**.
2. Select the **San Francisco Student Members** result.
 - Observe the view contains the same settings that were used in the Aptify Desktop client.

Figure 15.21
Aptify web
interface List
View

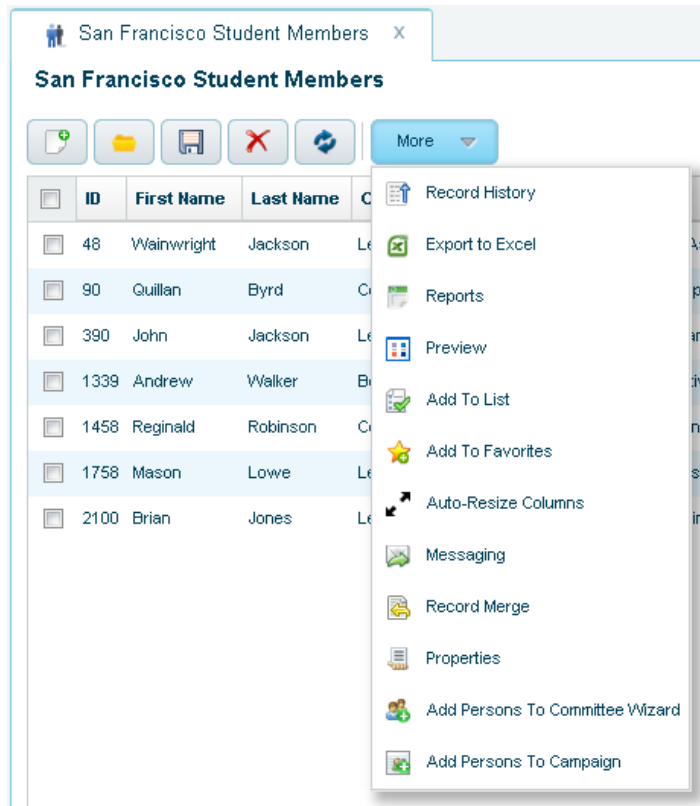


The screenshot displays a web interface for a list view titled "San Francisco Student Members". At the top, there is a search bar with a magnifying glass icon and a close button. Below the search bar, there are several action icons: a green plus sign, a yellow folder, a blue document, a red X, a blue refresh, and a "More" dropdown menu. The main content is a table with the following columns: ID, First Name, Last Name, Company, Title, Member Type, Member Type, and Department. The table contains seven rows of data.

ID	First Name	Last Name	Company	Title	Member Type	Member Type	Department
48	Wainwright	Jackson	Let's Stop N Shop	Advertising Associate	Student Member	Corporate Member	
90	Quillan	Byrd	Cottonwood Taping Systems	Customer Support Senior VP	Student Member	Corporate Member	
390	John	Jackson	Let's Stop N Shop	Director, Finance	Student Member	Corporate Member	
1339	Andrew	Walker	Bechtel Group, Inc.	Sales Executive VP	Student Member	Corporate Member	
1458	Reginald	Robinson	Cottonwood Taping Systems	Manager, Consulting Services	Student Member	Corporate Member	
1758	Mason	Lowe	Let's Stop N Shop	Manager, Research	Student Member	Corporate Member	
2100	Brian	Jones	Let's Stop N Shop	VP, Engineering	Student Member	Corporate Member	

- Note that users can edit the view's filters and other settings by clicking **More** and then selecting **Properties**.

Figure 15.22
Accessing
View
Properties



Summary

- Access Aptify web interface from laptops, tablets or other mobile devices
- Use Spaces to keep your organization up-to-date on Aptify activity
- Take advantage of Global Search to easily find any type of record
- Open Persons records in Edit Mode to see all of their information

Objective.....	A.1
Defining Award Types.....	A.2
Tracking Award Nominations.....	A.3
Tracking Awards and Incentives.....	A.5

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:

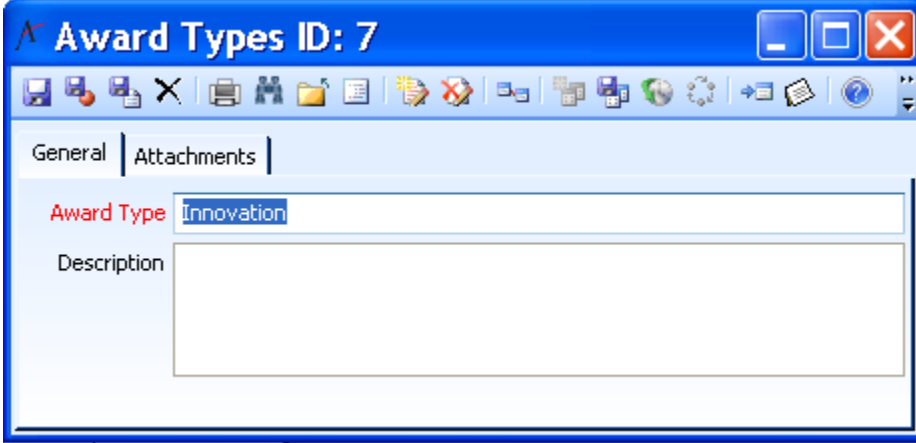
- Committee Years of Service Pins (and similar awards)
- Employee of the Month
- Sales Team Incentive Tracking

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 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. Enter **Innovation** in the name of the award in the **Award Type** field.
3. Enter **Test** the **Description** field.

Figure A.23
Award Types
Record



The screenshot shows a web browser window titled "Award Types ID: 7". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with various icons for file operations and navigation. The main content area has two tabs: "General" (selected) and "Attachments". Under the "General" tab, there are two fields: "Award Type" and "Description". The "Award Type" field contains the text "Innovation" and is highlighted with a blue selection box. The "Description" field is empty and has a larger text area below it.

4. Save and close the record.

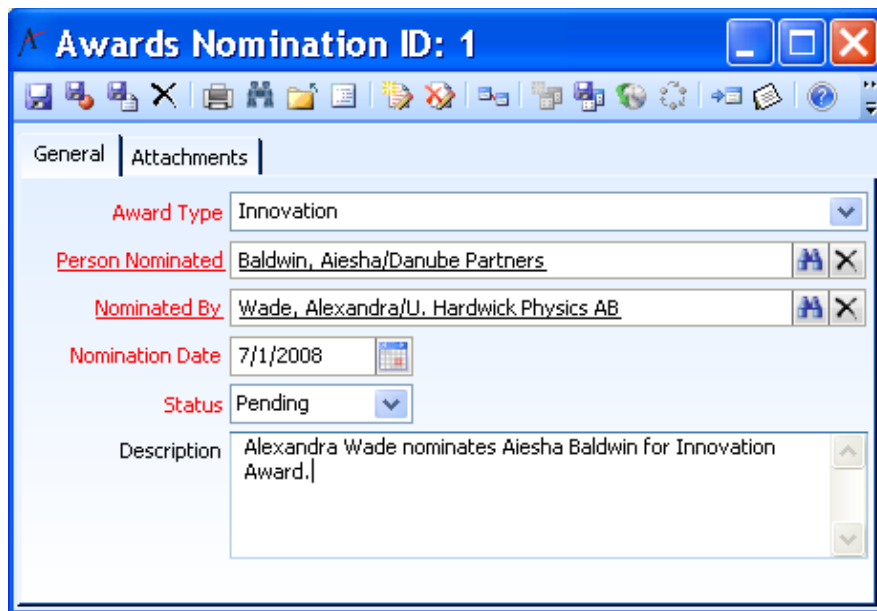
Tracking Award Nominations

Aptify's Award Management application includes the Awards Nomination service that can be used to track the award nomination process. The Awards Nomination service is for tracking. 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. Open a new record from the **Awards Nomination** service.
2. Select the **Innovation** award created earlier from the **Award Type** drop-down list.
3. Enter your **Persons** ID in the **Person Nominated** field.
4. Enter **Dalton Brown** in the **Nominated By** field.
5. Enter the date on which the nomination was received in the **Nomination Date** field.
6. Keep **Pending** as the current status of the nomination from the **Status** drop-down list. Pending is selected by default. Once a person has been added as an award nominee, you can add more information or modify the person's nomination status at any time as necessary during the nomination process. 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.
7. Enter **Test** in the **Description** field.
8. **Save** the record.



The screenshot shows a web application window titled "Awards Nomination ID: 1". The window has a blue header bar with standard window controls (minimize, maximize, close). Below the header is a toolbar with various icons for file operations and navigation. The main content area is divided into two tabs: "General" (selected) and "Attachments".

The "General" tab contains the following fields:

- Award Type:** A dropdown menu with "Innovation" selected.
- Person Nominated:** A text field containing "Baldwin, Aiesha/Danube Partners" with a user icon and a close button.
- Nominated By:** A text field containing "Wade, Alexandra/U. Hardwick Physics AB" with a user icon and a close button.
- Nomination Date:** A text field containing "7/1/2008" with a calendar icon.
- Status:** A dropdown menu with "Pending" selected.
- Description:** A text area containing "Alexandra Wade nominates Aiesha Baldwin for Innovation Award."

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 type of awards given, the recipient or recipients, the location of award ceremony, etc.

1. Open a new **Awards Granted** record with one of the following methods:
 - Open a new record from the **Awards Granted** service.
 - Open a new record from the **Awards** tab on a Persons record.
2. Select the **Nomination** award from the **Award Type** drop-down list.
3. Enter **Edward Aaronson** in the **Person Awarded** field.
4. Enter **today's date** in the **Date Achieved** field.
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, you could specify a second winner in the **Second Person Awarded** field.
6. Enter **HQ** in the **Award Ceremony Location** field.
7. Enter **Cash** in the **Other Benefit Provided** field.
8. Enter **Car** in the **Other Benefit Details** field.
9. Enter **Memento** in the **Memento Type** field.
10. Enter **Solid Gold** in the **Memento Type Details** field.

New Awards Granted Record

Award Type Innovation

Person Awarded Baldwin, Aiesha/Danube Partners

Date Achieved 8/1/2008 **Award Nomination** 1

Second Person Awarded

General | Description | Pictures | Attachments

Award Ceremony Location Grand Hall at Washington Hotel

Other Benefit Provided Trip Awarded

Other Benefit Details All expense paid trip to annual conference.

Memento Type Plaque

Memento Type Details Commerorative Plaque

11. Click the **Description** tab and add additional details about the award being grant or about the recipient(s).
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 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. Bring over the **Sales Force Automation** application.
1. Open a **New Record** from the **Opportunities** service.
2. Enter **XYZ Opportunity** in the **Name** field.
3. Select **General** from the **Type** drop-down list.
4. Enter yourself as the primary contact for this opportunity in the Account Manager field.
5. Enter a name for the primary contact person for this opportunity in the Person field.
6. Enter your **XYZ Company** as the name of the prospect in the **Company** field.

The screenshot shows a web browser window titled "New Opportunities Record". The form contains the following fields and values:

- Name:** XYZ Opportunity
- Type:** General
- Campaign:** (empty)
- Parent:** (empty)
- Account Manager:** Dave O'Connell
- Person:** Aaronson, Edward/Danube Partners
- Company:** XYZ Corporation
- Requested On:** 2/17/2009
- Proposal Sent On:** (empty)
- Expected Decision Date:** 2/20/2009
- Actual Decision Date:** (empty)
- Status:** Open
- Stage:** Raw Lead
- Source:** Direct Mail
- Acceptance Probability %:** 50
- Manager Acceptance Probability:** 50

Navigation tabs at the bottom include: Competitors, Sub-Opportunities, Status Reports, Roles, Comments, Attachments, Status, Details, Contacts, Contact Log, Line Items, History, Partners, and References.

7. Enter today's date in the **Requested On** field
8. Enter the date three days from today in the **Expected Decision Date**
9. Look at the options for the **Status**, **Stage**, and **Source** fields, but keep the defaults.
10. Click on the **Details** tab

Competitors | Sub-Opportunities | Status Reports | Roles | Comments | Attachments
 Status | Details | Contacts | Contact Log | Line Items | History | Partners | References

Requested On: 2/17/2009

Detail Level: Category

Commission Percent: 100 Override Commission Percent

Lost To: _____

Prior Opportunity: _____

Next Proposal: _____

Confidentiality Level: None

Confidentiality Comments: _____

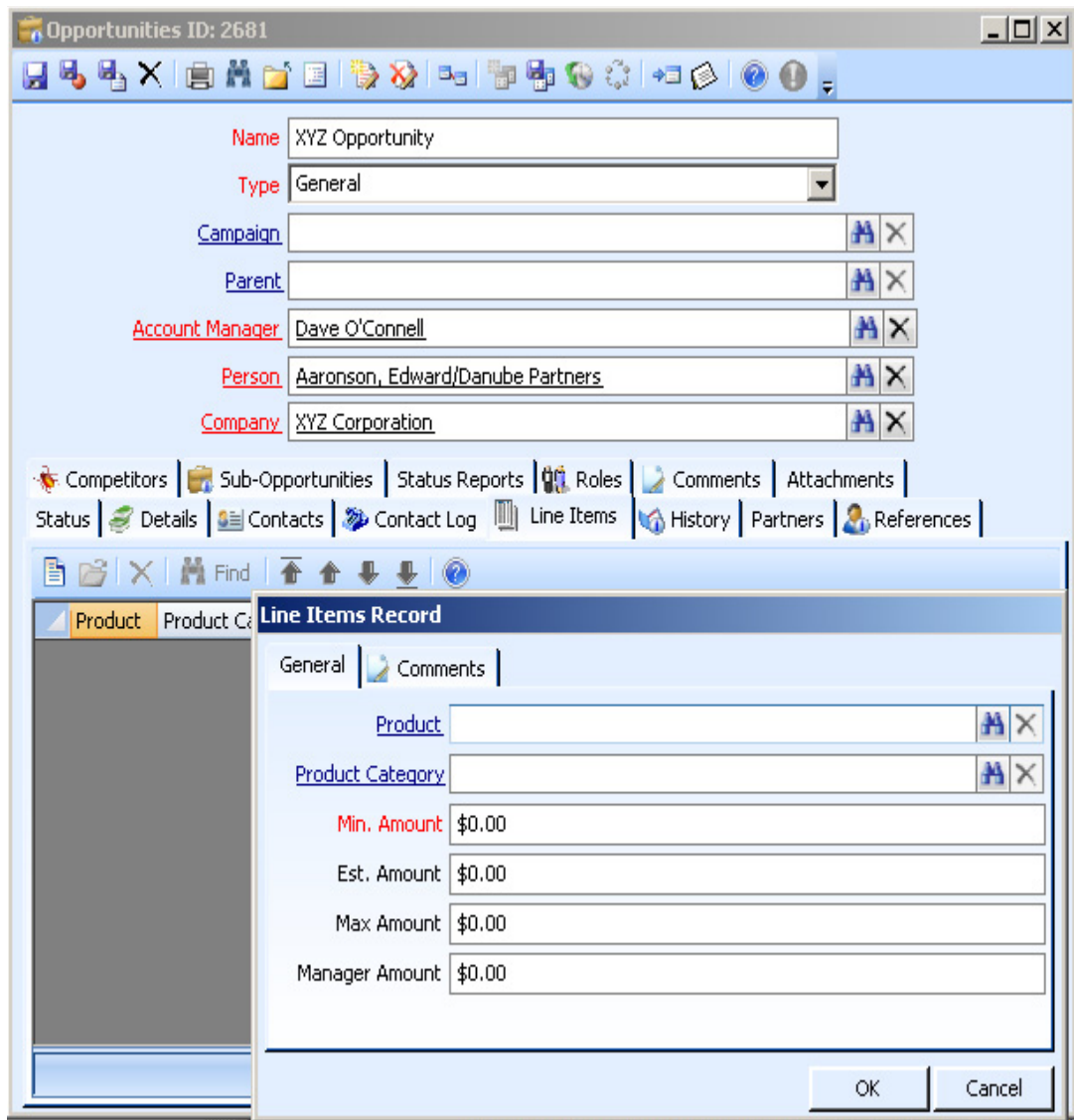
11. Observe the Details fields, especially the **Commission Percent** and **Confidentiality Level** fields
12. Return to the **Details** tab
13. Change the Status to **On Hold**
14. Open up the History Tab
15. Observe: the Status change history is recorded under this tab.

Competitors | Sub-Opportunities | Status Reports | Roles | Comments | Attachments
 Status | Details | Contacts | Contact Log | Line Items | History | Partners | References

Edit In Place | Find | [Navigation icons]

Approval Status	Updated By	Decision By	Effective Date	Stage	Status	Total Min Amount	Tot
Pending	Dave O'Connell		2/17/2009	Raw Lead	Open	\$0.00	
Pending	Dave O'Connell		2/17/2009	Raw Lead	On Hold	\$0.00	

16. Click on the **Line Items** tab
17. Open a new **Line Item**
18. The Line Items tab stores information about the set of goods and/or services being offered to the prospect in the opportunity's proposal. In other words, 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).



19. **Save** the record
20. Click on the **Competitors** Tab

21. The Competitors record tracks information about any known companies competing for a particular opportunity.
22. **Add** a New **Competitor's** Record
23. Observe the fields available to track your competition:

The screenshot shows a 'Competitors Record' dialog box with the following fields and controls:

- Competitor:** Text input field with a help icon and a close button.
- Sales Person:** Text input field with a help icon and a close button.
- Description:** Text area for entering details.
- Reseller ID:** Text input field with a help icon and a close button.
- Status:** Dropdown menu currently set to 'Active'.
- Rank:** Dropdown menu.
- Probability:** Text input field containing the value '0'.
- Lost To:** A checkbox that is currently unchecked.
- LostToReason:** Dropdown menu.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

24. **Save** and **Close** the Record.

Accounting Information	C.1
Batching	C.2
Creating an Orders Batch	C.3
Creating a Payments Batch	C.8
Expanding a Scheduled Transaction Group	C.11
Cash Control Batches	C.16

Accounting Information

Financial Management Features

- Tracks General Ledger (GL) accounts
- Creates GL entries for orders and payments
- Includes Cash Control management
- Integrates with VeriSign Payflow Pro for credit card authorization and payment captures
- Supports multi-entity accounting between parent organization and subsidiaries
- Supports multiple currencies

Batching

General Ledger (GL) Batches in Aptify are used to transfer the GL Entry information from the Orders, Payments, and Scheduled Transactions services to the organization's accounting system. The Batch is designed to sum the individual entries in multiple orders, payments, or scheduled transactions. Batches can sum up any number of orders, payments, or scheduled transactions but can not include more than one type of record. For this reason, four batch types exist. They are **Order Batches, Payment Batches, Scheduled Transaction Batches, and Cash Control Batches.**

GL Batching:

- **Aggregates all individual GL entries from the records into one ledger entry**
- **A single GL batch includes records of the same type and the same currency**
 - If using multiple currencies, one General Ledger batch is created for each currency type
- **Once batched, a record's financial fields cannot be modified**
 - This maintains integrity between Aptify and the Accounting system
 - The General Ledger batch number appears on the record
 - General Ledger Batch records contain GL entries that can be exported to your organization's financial system
- **During the order batching process, Aptify automatically adjusts a product's inventory count as necessary**

In this section, you will learn how to:

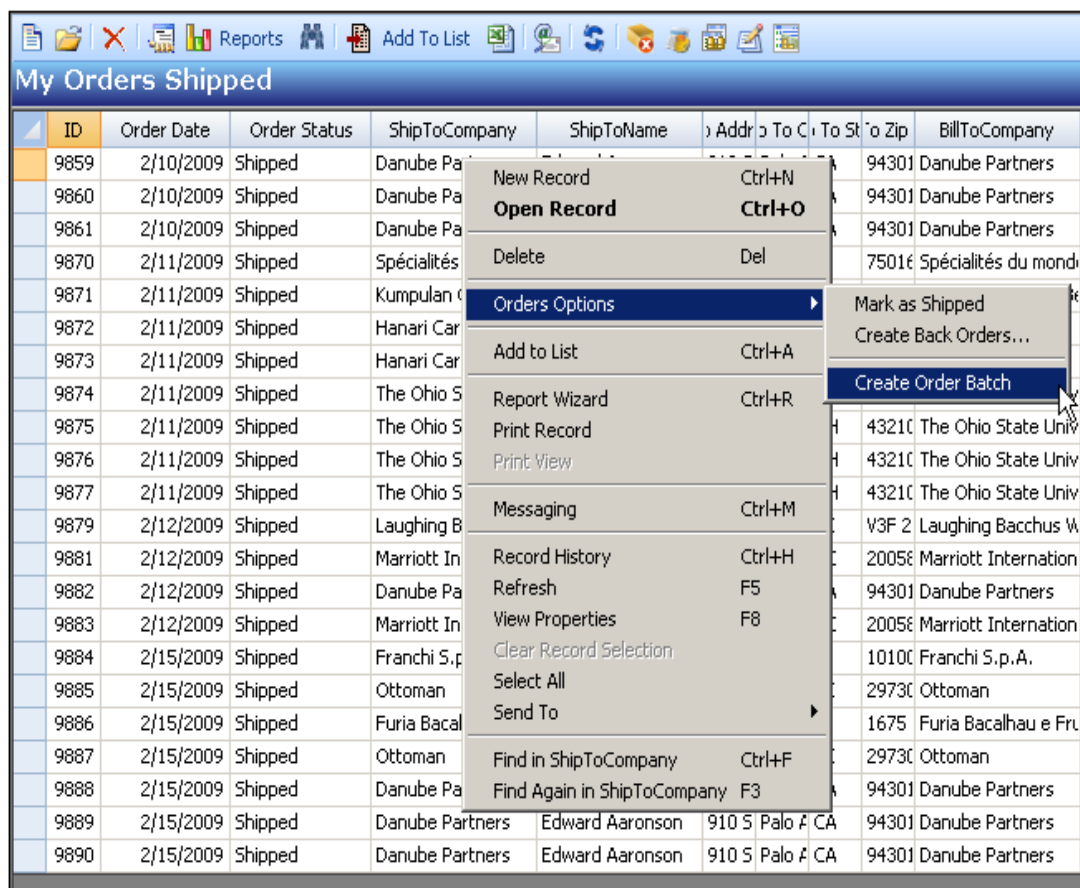
- Create an Orders Batch
- Create a Payments Batch
- Expand Scheduled Transaction Groups
- Create a Scheduled Transaction Batch

Creating an Orders Batch

Order Batches are used to transfer the GL Entries from a set of shipped orders to the accounting system.

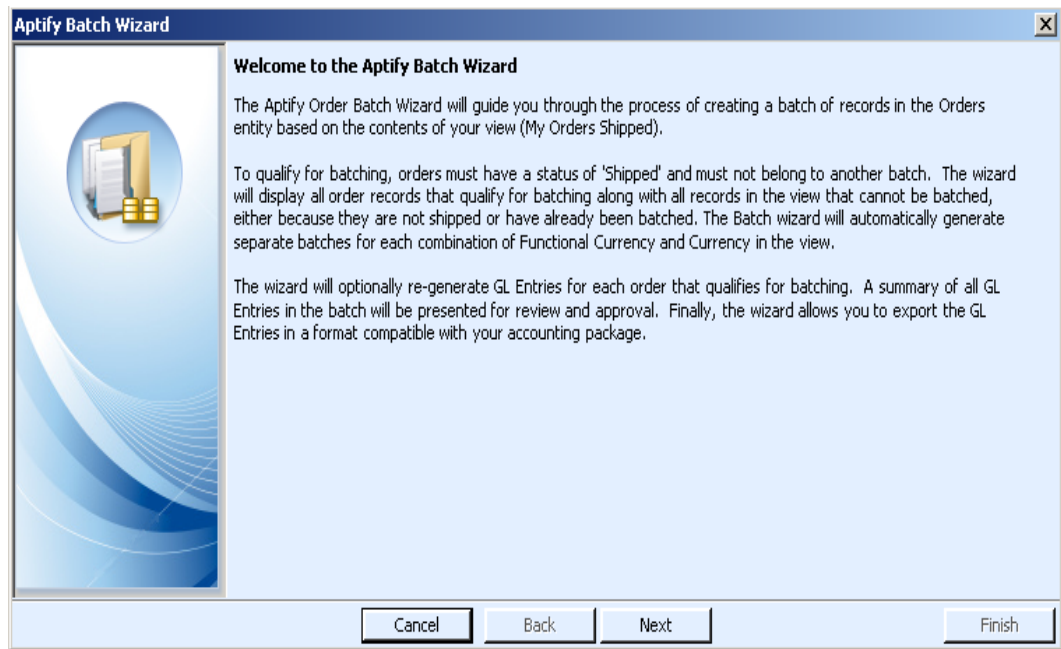
1. Open a **view of orders** that you have created that are in a **Shipped** status.
 - If you do not have one already, you can create a view that displays only the orders where the Taken By field shows your Employees record. You can also ask your instructor for assistance constructing this type of view.
2. Right click within the view and select **Order Options > Create Order Batch** from the pop-up list.

Figure C.1
Create Order Batch



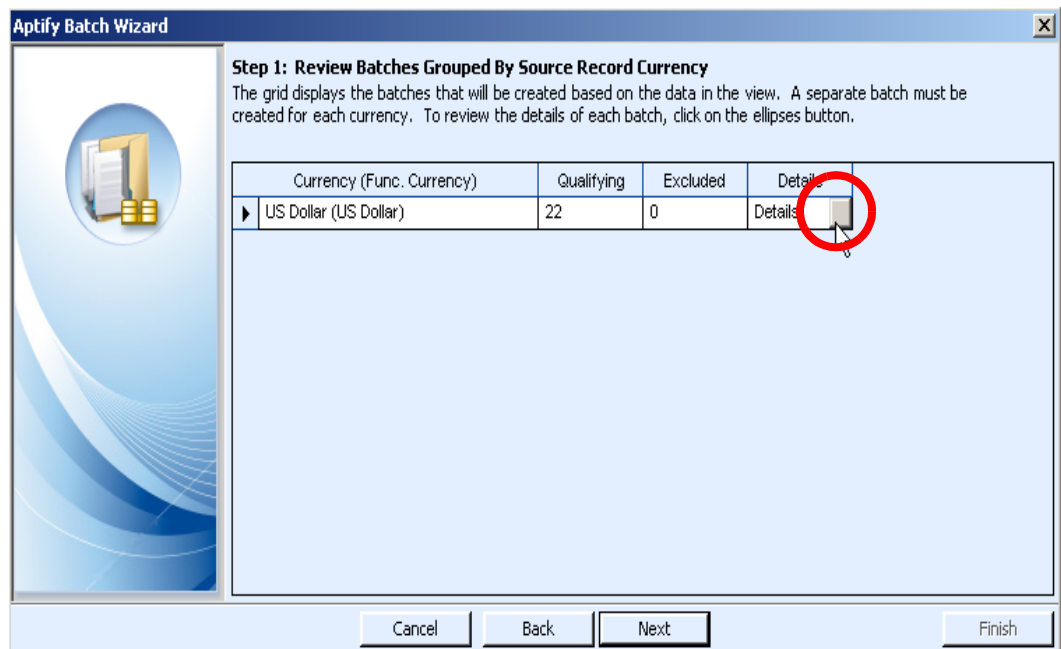
3. Read the introduction on the first screen of the **Aptify Batch Wizard -- Orders** and click **Next** to continue.

Figure C.2
Order Batch
Wizard



4. The wizard reports the number of records that qualify for the batch and the number of records that do not qualify.
 - Only orders that have shipped and have not been previously batched qualify.
 - To view the list of included or excluded orders, click in the **Details** field and click the button that appears.

Figure C.3
Review
Records for
Batching



5. Click **Next** to continue.

6. Review the instructions for Step 2: Generate Order GL Entries and click **Next**.
 - Do not select the **Regenerate Entries** checkbox.
 - Depending on the number of orders in the batch, it may take an extended amount of time to complete the regeneration process.
 - In most cases, you do not need to regenerate the entries before batching orders. In general, you should only regenerate entries if you made changes to the system's GL accounts since the orders you are batching were created.
7. Click **Next** to continue.
 - The wizard displays the debit and credit totals for the orders in the batch.
8. Click in the **Details** field and click the button that appears to review the Batch Summary GL Entries.

Figure C.4
Batch
Summary GL
Entries

Batch Summary GL Entries				
GL Account	Description	Debit	Credit	Weighted Avg Spot Rate
1101	Accounts Receivable	\$55,530.64	0	
4401	Sales Discounts	\$10,664.26	0	
5950	Cost of Goods Sold	\$378.35	0	
5951	Furniture COGS	\$224.30	0	
4006	Furniture Sales Account	0	\$38,200.00	
2901	Deferred Income	0	\$12,847.00	
4008	Exhibit Sales	0	\$6,200.00	
4002	Meeting Sales	0	\$5,600.00	
Totals:		\$66,797.55	\$66,797.55	

12 Items

OK

9. Click **OK** to close the summary screen.
10. Select the **Approval** checkbox.

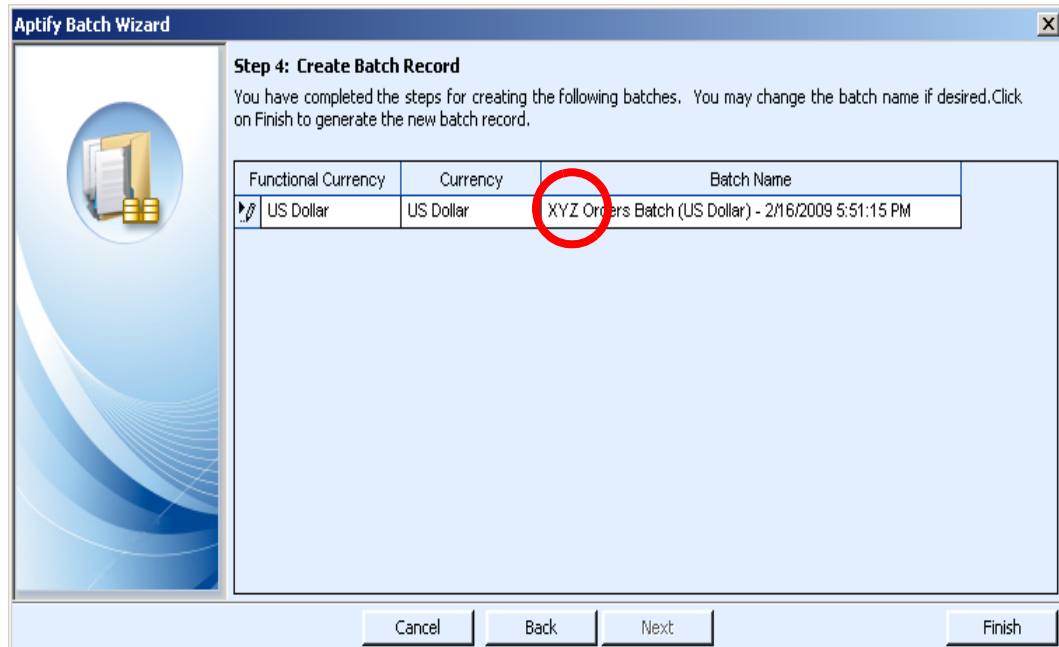
Figure C.5
Approve Batch

Aptify Batch Wizard					
Step 3: Review Summary GL Entries:					
The following GL Entries summarize the entries for all Orders batches. After reviewing the GL activity, click on the 'Approve GL Entries' checkboxes in the grid and proceed to the next step.					
Currency (Func. Currency)	Debit	Credit	Effective Date	Approval	Details
US Dollar (US Dollar)	\$66,797.55	\$66,797.55	2/16/2009 5:51:15 PM	<input checked="" type="checkbox"/>	Details

Cancel Back Next Finish

11. Click **Next** to continue.
12. Click in the **Batch Name** field and add your initials to the beginning of the batch name.

Figure C.6
Modify Batch
Name



13. Click **Finish**.
 - The Batch Results window appears and reports the ID for the batch you just created.
 - You can also double-click an entry to export the batch results to a file. By default, Aptify supports exporting the results to a CSV (Comma Delimited) file.
14. Write down the Batch ID here: ____.
15. Click **OK** to close the wizard.
16. Open the first record in the My Orders view.
 - Note that the Batch ID now appears under Customer Type.

Figure C.7
Batch ID on
Orders Form

Order Entry

Order Date: 1/9/2010 9:28:33 P

Ship To: Lee, Nadia/Laughing Bacchus Wine Cellar

Ship To Company: Laughing Bacchus Wine Cellars

Billing Same as Shipping:

Bill To: Lee, Nadia/Laughing Bacchus Wine Cellar

Bill To Company: Laughing Bacchus Wine Cellars

Taken By: Tim Jones

Sales Rep:

Campaign:

Ship To Address: 1900 Oak St.

Line 1: 1900 Oak St.

Line 2:

Line 3:

City, State ZIP: Vancouver BC V3F 2K1

Country: Canada

Ship To Phone:

Lines

Line	Type	Product	Description	Quantity	Price	Discount	Extended
1		S3 Rectangular Conference Table	Rectangular Conference Table	3.0000	\$3,500.00	15.0000	\$8,925.00

Summary

Order Source: Walk-In

Currency Type: US Dollar

Order Type: Regular

Order Status: Shipped

Original Order:

Organization: Sampco Holdings, Inc.

Customer Type: Corporate Member/Non-Member

Batch ID: 2 (2/16/2009 5:51:15 PM)

Cancellation Reason: (N/A)

Ship Partial:

Order Level: Regular

Sub-Total: \$8,925.00

Shipping: \$0.00

Handling: \$0.00

Tax: \$0.00

Total: \$8,925.00

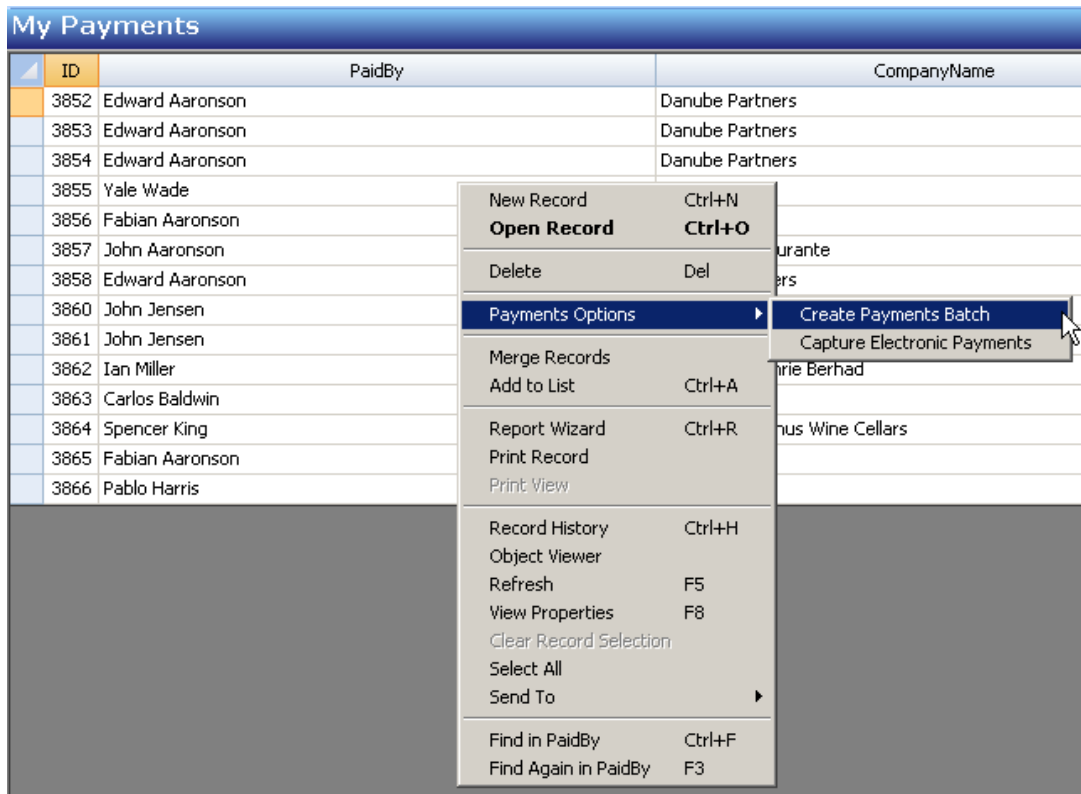
Balance: \$0.00

17. Close the record.

Creating a Payments Batch

1. *Right click* the **Payments** service select **Create View** from the pop-up list.
2. Enter **My Payments** in the **Name** field.
3. Click the **Filters** tab.
4. Add the following filter:
 - **Service:** Payments
 - **Field:** EmployeeID
 - **Operator:** =
 - **Value:** The ID number of the Employees record that is linked to your user account. Ask your instructor if you need assistance identifying this number.
5. Click **OK** to save and open the view.
 - The view displays all of the Payments records for which your Employee ID appears in the Taken By field.
6. *Right click* within the view and select **Payment Options > Create Payment Batch** from the pop-up list.

Figure C.8
Create
Payment Batch

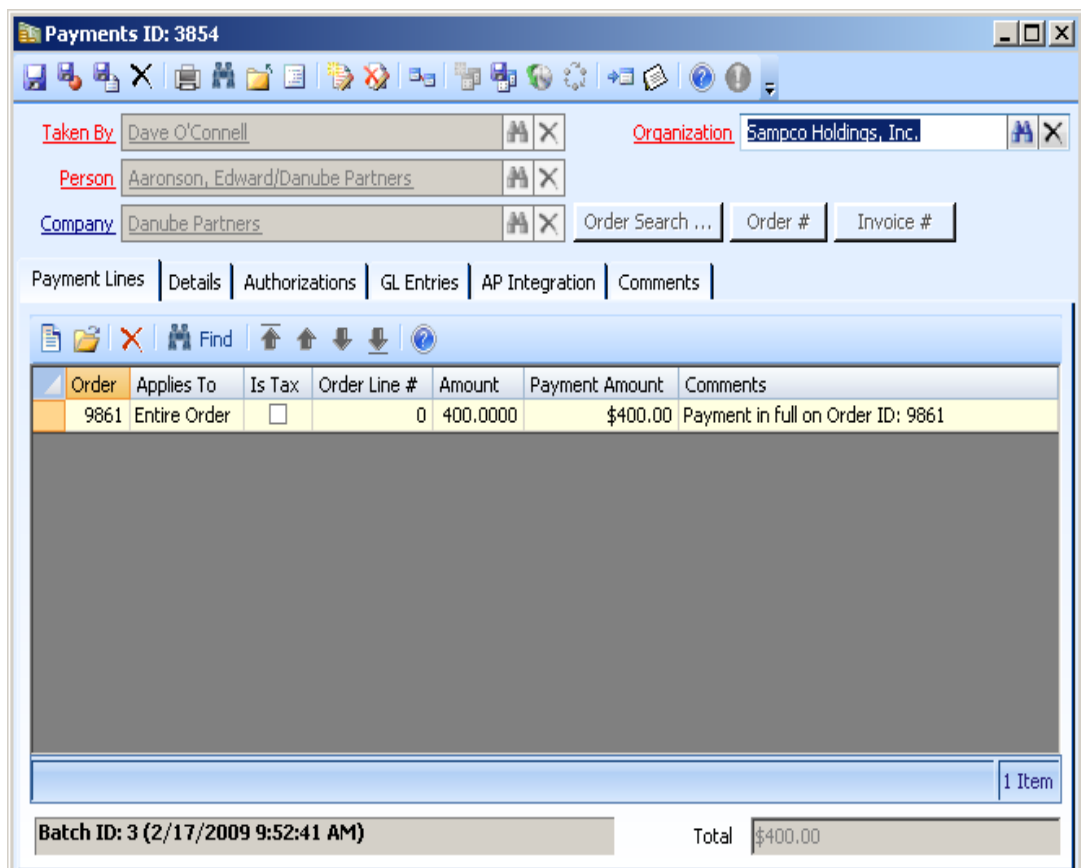


7. Read the introduction on the first screen of the **Aptify Batch Wizard -- Payments** and click **Next** to continue.

8. The wizard reports the number of records that qualify for the batch and the number of records that do not qualify.
 - Payments that have already been batched are excluded from the batch process.
 - To view the list of included or excluded payments, click in the **Details** field and click the button that appears.
9. Click **Next** to continue.
10. Review the instructions for Step 2: Generate Payment GL Entries and click **Next**.
 - Do not select the **Regenerate Entries** checkbox.
 - In most cases, you do not need to regenerate the entries before batching payments. In general, you should only regenerate entries if you made changes to the system's GL accounts since the payments you are batching were created.
11. Click **Next** to continue.
 - The wizard displays the debit and credit totals for the payments in the batch.
12. Click in the **Details** field and click the button that appears to review the Batch Summary GL Entries.
13. Click **OK** to close the summary screen.
14. Select the **Approval** checkbox.
15. Click **Next** to continue.

16. Click in the **Batch Name** field and add your initials to the beginning of the batch name.
17. Click **Finish**.
 - The Batch Results window appears and reports the ID for the batch you just created.
 - You can also double-click an entry to export the batch results to a file. By default, Aptify supports exporting the results to a CSV (Comma Delimited) file.
18. Write down the Batch ID here: ____.
19. Click **OK** to close the wizard.
20. Open the first record in the My Payments view.
 - Note that the Batch ID now appears at the bottom of the Payments record.

Figure C.9
Batch ID on
Payments
Form



21. Close the record.

Expanding a Scheduled Transaction Group

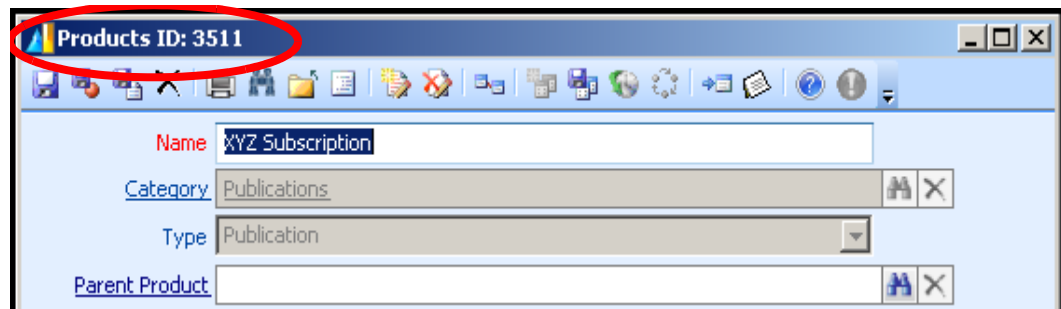
The **Scheduled Transaction Groups** service exists for performance reasons. Since a single order could require a substantial number of Scheduled Transactions records to be created in order to recognize revenue over a long earn-out period, generating all the Scheduled Transactions records at the time the order is shipped could place a substantial load on the system.

The process of generating the actual Scheduled Transactions records from the Scheduled Transaction Groups record is known as **Expanding Scheduled Transaction Groups**. The process may be invoked at any time by choosing the Expand Scheduled Transaction Groups icon from the toolbar in any Scheduled Transaction Groups view.

Note: Aptify recommends that Scheduled Transaction Group expansion occur after hours, since the process may be resource intensive (depending on how many groups you are expanding). Create or open a view of the Products service.

1. Open your **XYZ Subscription** record (or the ID of another subscription product).
2. Write down the **Product ID** here: _____.

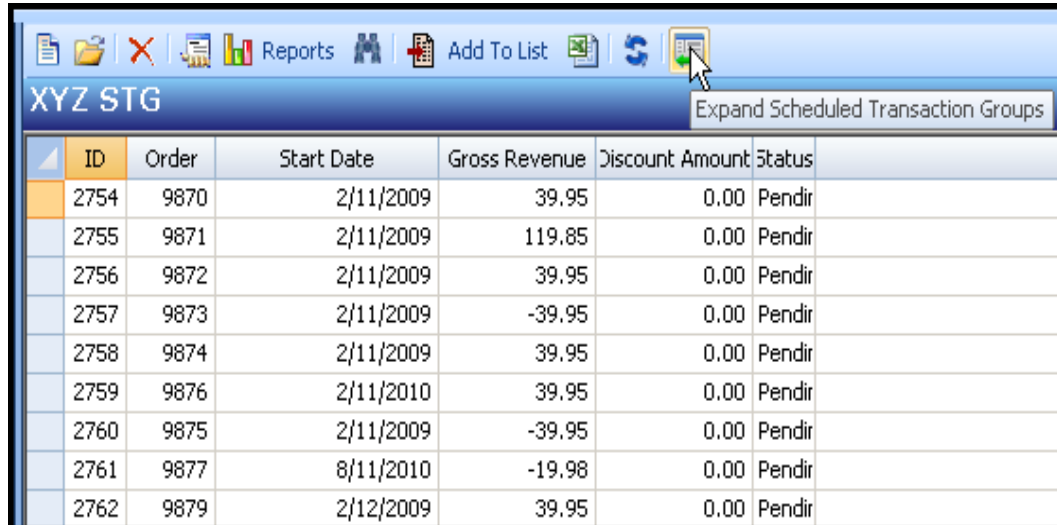
Figure C.10
Locating
Product ID



3. Close the record.
4. *Right click* the **Scheduled Transaction Groups** service and select **Create View** from the pop-up list.
 - Scheduled Transaction Groups is located under the Accounting application.
5. Enter **XYZ STG** in the **Name** field (where *XYZ* are your initials).
6. Click the **Filters** tab.
7. Add the following filter:
 - **Service:** Scheduled Transaction Groups
 - **Field:** ProductID
 - **Operator:** =
 - **Value:** The ID number of Subscription product (which you wrote down in Step 3).
8. Click **OK** to save and open the view.
 - The view displays all of the Scheduled Transaction Groups records related to subscription product.

9. Click the **Expand Scheduled Transaction Groups** button.
 - Alternatively, you can *right click* within the view and select **Scheduled Transaction Groups Options > Expand Scheduled Transaction Groups** from the pop-up list.

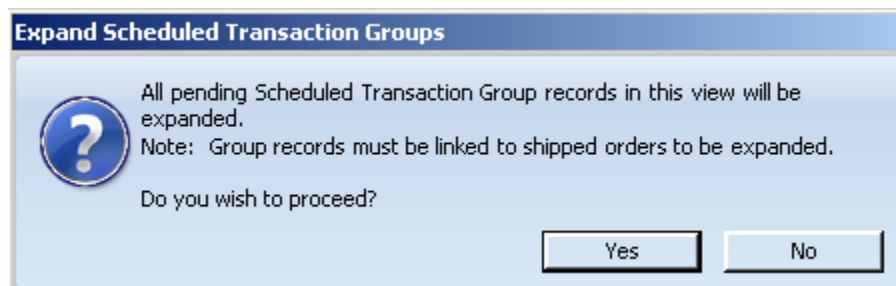
Figure C.11
Expand
Scheduled
Transactions
Groups



ID	Order	Start Date	Gross Revenue	Discount Amount	Status
2754	9870	2/11/2009	39.95	0.00	Pendir
2755	9871	2/11/2009	119.85	0.00	Pendir
2756	9872	2/11/2009	39.95	0.00	Pendir
2757	9873	2/11/2009	-39.95	0.00	Pendir
2758	9874	2/11/2009	39.95	0.00	Pendir
2759	9876	2/11/2010	39.95	0.00	Pendir
2760	9875	2/11/2009	-39.95	0.00	Pendir
2761	9877	8/11/2010	-19.98	0.00	Pendir
2762	9879	2/12/2009	39.95	0.00	Pendir

10. Click **OK** to expand all pending Scheduled Transaction Groups.

Figure C.12
Confirm
Expansion of
Scheduled
Transaction
Groups



11. Be patient while the Scheduled Transaction Groups are expanded. Click **OK** when prompted that the process is complete.
12. Click the **Refresh** button on the Scheduled Transaction Groups View Toolbar.
 - Note that the **Status** changes from **Pending** to **Complete**.
 - Close the View

Creating a Scheduled Transactions Batch

1. *Right click* the Scheduled Transactions service (under the **Accounting** application) and select **Create View** from the pop-up list.
2. Enter **XYZ Transactions** in the **Name** field (where *XYZ* are your initials).
3. Click the **Filters** tab.
4. Add the following filter:
 - **Service:** Products
 - **Field:** ID
 - **Operator:** =
 - **Value:** The ID number of the **XYZ Subscription** product
 - Click **OK** twice to save and open the view.
5. Click **OK** to load the view.
6. Click the **Create Scheduled Transaction Batch** icon in the view toolbar to launch the Batch wizard.

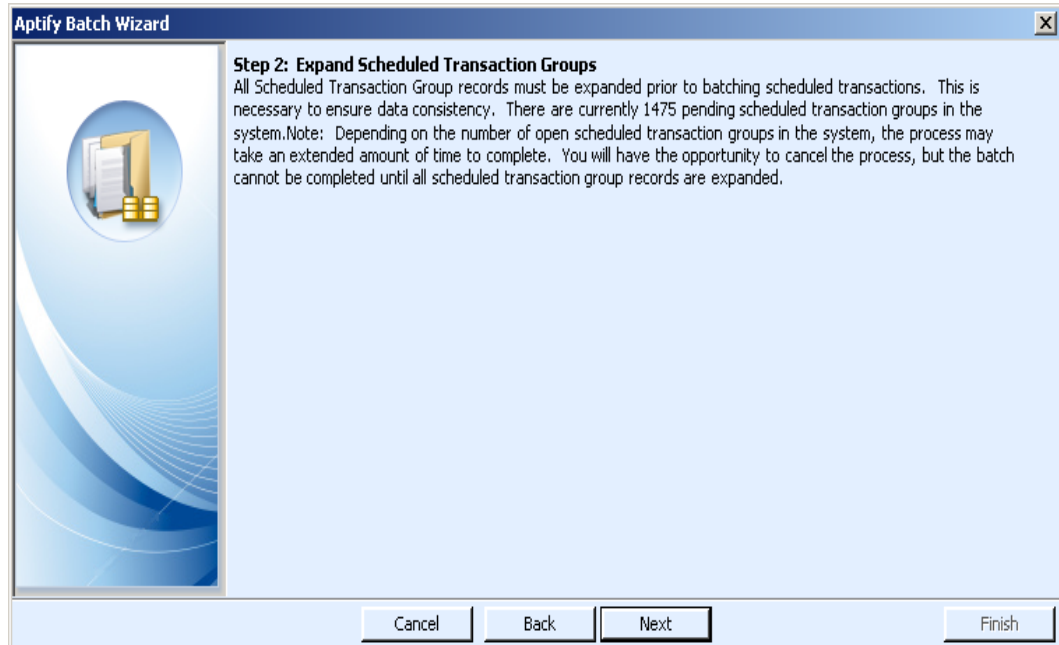
Figure C.13
Create
Scheduled
Transactions
Batch

ID	Scheduled Date	Description	type	Order
354	2/11/2009	February 2009 reco	Deferred Income	9870
355	3/11/2009	March 2009 recognil	Deferred Income	9870
356	4/11/2009	April 2009 recognitic	Deferred Income	9870
357	5/11/2009	May 2009 recognitic	Deferred Income	9870
358	6/11/2009	June 2009 recogniti	Deferred Income	9870
359	7/11/2009	July 2009 recognitio	Deferred Income	9870
360	8/11/2009	August 2009 recognr	Deferred Income	9870
361	9/11/2009	September 2009 rec	Deferred Income	9870

7. Read the introduction on the first screen of the **Aptify Batch Wizard -- Scheduled Transactions** and click **Next** to continue.
8. The wizard reports the number of records that qualify for the batch and the number of records that do not qualify.
 - Transactions that have already been batched are excluded from the batch process.
 - To view the list of included or excluded transactions, click in the **Details** field and click the button that appears.

9. Click **Next** to continue.
10. Click **Next** to expand any pending Scheduled Transactions Group and compile the relevant GL entries.

Figure C.14
Expand
Scheduled
Transaction
Groups Step (if
necessary)



11. The wizard displays the debit and credit totals for the transactions in the batch.
12. Click in **Details** field and click button that appears to review Batch Summary GL Entries.
13. Click **OK** to close the summary screen.
14. Select the **Approval** checkbox.
15. Click **Next** to continue.

16. Click in the **Batch Name** field and add your initials to the beginning of the batch name.
17. Click **Finish**.
 - The Batch Results window appears and reports the ID for batch you just created.
 - You can also double-click an entry to export the batch results to a file. By default, Aptify supports exporting the results to a CSV (Comma Delimited) file.
18. Write down the Batch ID here: ____.
19. Click **OK** to close the wizard.
20. Open the first record in your Scheduled Transactions view.
 - Note the Batch ID now appears at the top of the Scheduled Transactions record.

Figure C.15
Batch ID on
Scheduled
Transactions
Form

Scheduled Transactions ID: 25360

Scheduled Date: 8/11/2009 Batch ID: 4

Description: August 2009 recognition of 1/12 of XYZ Subscription revenue.

Type: Deferred Income Source Order: 9870

Organization: Sampco Holdings, Inc.

Currency: US Dollar

GL Entries | Comments

GL Account	Debit Amount	Credit Amount
2901	\$3.33	\$0.00
4003	\$0.00	\$3.33

Totals: \$3.33 \$3.33

21. Close the record.

Cash Control Batches

The manual processing of cash receipts is performed by creating a new Cash Control Batches record, and manually entering the cash receipts/corresponding Payments records. Once total receipts and applied payments are equal, cash control batches may be marked as approved. Once approved, Cash Control Batches are considered locked and can no longer be edited.

Follow these steps to create a cash control batch:

1. Open a new record from the **Cash Control Batches** service.
 - The Cash Control Batches service is located in the Accounting application.
 - Today's date automatically populates the **Date Entered** field.
2. Enter **date** for deposited funds into organization's bank account in **Deposit Date** field.
3. Your **name** should default in the **Entered By** field.
 - This field links to the Employees service.
4. Enter a **cash receipt** on the Cash tab, following these steps:
 - Enter the customer's name in the **Customer** field.
 - Enter the amount of the cash receipt in the **Amount** field.
 - Enter the payment type of the cash receipt in the **Type** field.
 - **This field links to the Payment Types service.**

- Typically, the payment type is Pre-paid Check. But depending organization's policies, it could also be a credit card (for example, if a customer/member returned order form with credit card information completed).

5. Click the **Add** button to add the entry to the receipt list.

6. To track the check number of the cash receipt or add more information, double-click the cash receipt in the list to open the **Cash Detail** record.
 - Enter the **Check Number** in the field provided.
 - Click the Comments tab and enter any additional information.
 - Click **OK** to close the form.

Note: that the Lock Box Information section of the form is not applicable to a manual

cash control batch (these fields are used with the Lock Box functionality).

The screenshot shows the 'Cash Detail Record' window with the following details:

- Payment Information:** Customer: Danube, Amount: \$100.00, Check Number: 84/355, Payment Type: Pre-Paid Check.
- Lock Box Information:** Status: Unmatched, Bank Key, Order ID, Payment ID.
- Exception Type:** None, Exception Status.
- Post Record:**

Order Total	\$0.00
Prior Payments	\$0.00
Balance Due	\$0.00
This Payment	\$0.00
Over-Payment	\$0.00
- Post Options:**
 - Post
 - Post + Refund Overpayment
 - Post + Refund Entire Payment
 - Allocate Overpayment - Same Order
 - Allocate Overpayment - New Order

7. Add additional cash receipts, as needed.

As you add cash receipts to the record, the system automatically updates the Cash Total field to equal the sum of the individual cash receipts, as shown below.

The screenshot shows the 'Cash' window with the following details:

- Totals:** Cash Total: \$210.00, Payment Total: \$0.00.
- Table of Cash Receipts:**

Customer	Amount	Order ID	Payment ID	Status
Danube	\$100.00	-1	-1	Unmatched
ottoman	\$35.00	0	0	Unmatched
Pacific Rim	\$75.00	0	0	Unmatched
- Footer:** 3 Items

8. **Save** the Cash Control Batches record.
9. **Associate** the cash receipts in the Cash Control Batch with Payments records in Aptify.
 - Generally, each cash receipt has a corresponding Payments record in Aptify that is applied to an Orders record.
 - You do not associate a particular receipt with a Payments record directly. Instead, you associate a Payments record with a Cash Control Batch.
 - As payments are associated with the Cash Control Batch, they appear on the Payments Posted tab, and the value of the Payment Total field increases, as illustrated above. (Note that you may need to close and reopen the Cash Control Batches record to see the updated Payment Total.)

The screenshot displays the 'Cash Control Batches ID: 1' window. The 'Payments Posted' tab is selected, showing a table with the following data:

ID	Amount	PaidBy	CompanyName	Payment Dal
3868	70.00	Baka Lambert		2/17/2009
3867	50.00	Edward Aaronson		2/17/2009

The bottom right corner of the window indicates '2 Records'.

10. Follow one of these step to associate a payment with a Cash Control Batch:

If a payment already exists that corresponds to this cash receipt, open that Payments record and click the Details tab. Then enter the ID of the Cash Control Batches record in Cash Control Batch field. Save and close the Payments record.

- a) If the payment does not yet exist that corresponds to the cash receipt but the order does exist (for example, the customer provided a Purchase Order for future payment at the time the order was taken), create a new Payments record and specify the appropriate Cash Control Batch in the field on the Details tab. Note that if you open a new payment from the Cash Control Batches record's Payments Posted tab, the system will pre-populate the Cash Control Batch field on the new payment for you.
- b) If an order and payment corresponding to the cash receipt does not yet exist in the system (for example, if the customer sent in a completed mail order form with payment), create a new order for the customer and specify the appropriate initial payment information.

11. Click the approve button once the Payment Total equals the Cash Total.

Cash Control Batches ID: 1

Date Entered 2/17/2009

Deposit Date 2/19/2009

Entered By Dave O'Connell

Date Approved Approve

Approved By

Cash Total \$210.00 Payment Total \$210.00

12. Click **OK** when prompted to confirm the approval request.

The system automatically performs the following actions:

- It inserts the current date and time in the Date Approved field.
- It replaces the Approve button with a De-Approve button.
- It inserts your name in the Approved By field (this links to your Employees record).
- It locks down the Cash tab to prevent any further modifications to the cash receipts information.
- It prevents any additional payments from being associated with this Cash Control Batches record.
- It prevents any modification to the payment information in the Payments records associated with the Cash Control Batch

Cash Control Batches ID: 1

Date Entered: 2/17/2009

Deposit Date: 2/19/2009

Entered By: Dave O'Connell

Date Approved: 2/17/2009 11:04:43 AM De-Approve

Approved By: Dave O'Connell

Cash Total: \$210.00 Payment Total: \$210.00

Cash | Comments | Attachments | Payments Posted

Payments Posted for this Cash Control Batch

ID	Amount	PaidBy	CompanyName	Payment Dal
3868	70.00	Baka Lambert		2/17/2009
3867	50.00	Edward Aaronson		2/17/2009
3869	90.00	Valerie Rodriquez		2/17/2009

3 Records

13. If you need to modify the Cash Control Batch after it has been approved, follow these steps:
- Click the De-Approve button: the system clears the Date Approved and Approved By fields and re-enables the Cash tab.
 - Modify the Cash Control Batch as necessary.
 - When finished, click the Approve button again to re-approve the Cash Control Batch.

D

Publication Functions

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. Select the **Delivery Schedule** tab on the Subscriptions record.
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-based form titled "Subscription Delivery Schedule Record" with a "General" tab selected. The form contains the following fields and values:

- Start Date:** 12/7/2011
- End Date:** 1/7/2012
- Address:** A dropdown menu with a search icon.
- Line 1:** 55 Main Street
- Line 2:** (empty)
- Line 3:** (empty)
- City, State ZIP:** Alexandria, VA, 22301
- County:** Alexandria City
- Country:** United States
- Phone:** 1 555 555-0090 x (empty)
- Email:** (empty)
- Requested By:** Miller, Ian/Kumpulan Guthrie Berhad
- Distribution Type:** Hard Shipment

At the bottom of the form, there are three buttons: "OK and New" (highlighted with a dashed border), "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

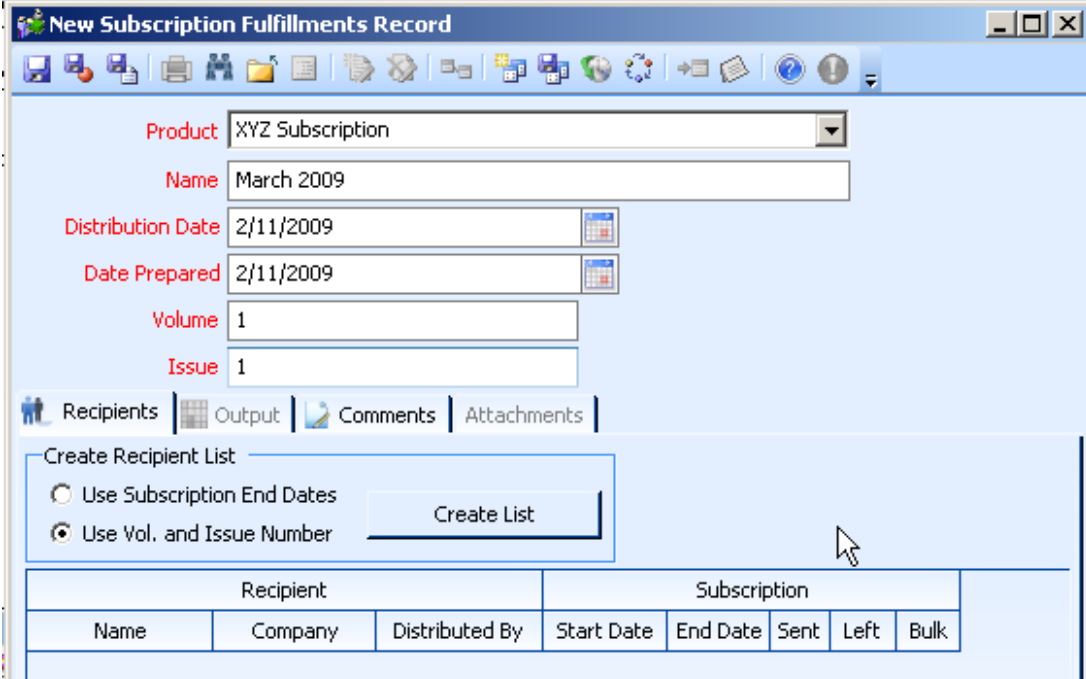
The Subscription Fulfillments service enables you to track the distribution of a subscription's issue, specifying the distribution date, volume, and the recipients. In addition, by processing a subscription fulfillment, mailing labels are automatically generated.

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.

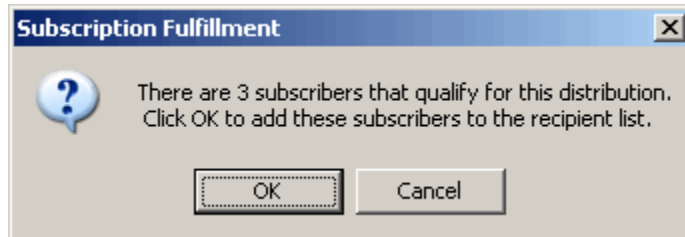
After you run a fulfillment, observe the Output, Mailing Labels to see how the mailing labels will look. You can also go back to the delivery log to observe how an entry is made after fulfillment. You will not be able to use the Output field during fulfillment if you did not make the Delivery Type "Hard Shipment".

1. *Right click* the **Subscription Fulfillments** service and select **New Subscription Fulfillments Record** from the pop-up list.
2. Select **XYZ Subscription** from the **Product** drop-down list.
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.



Recipient			Subscription				
Name	Company	Distributed By	Start Date	End Date	Sent	Left	Bulk

7. Verify that the **Use Vol. and Issue Number** option is selected (this is the default setting).
8. Click the **Create List** button.
 - A dialog box appears that informs you how many people qualified for this distribution.

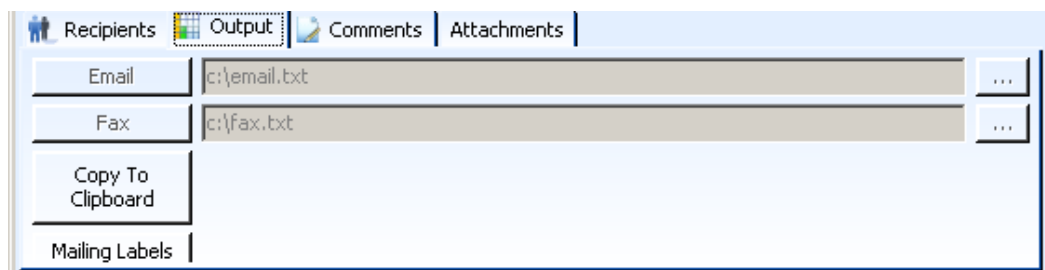


9. Click **OK**.
 - The record is saved automatically and an ID number is assigned.
 - The qualified recipients appear under the Recipient tab. You should see the following information if you completed the earlier exercises in this lab:
 - 1 issue was sent to your **Person**, leaving 11 remaining.
 - 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).

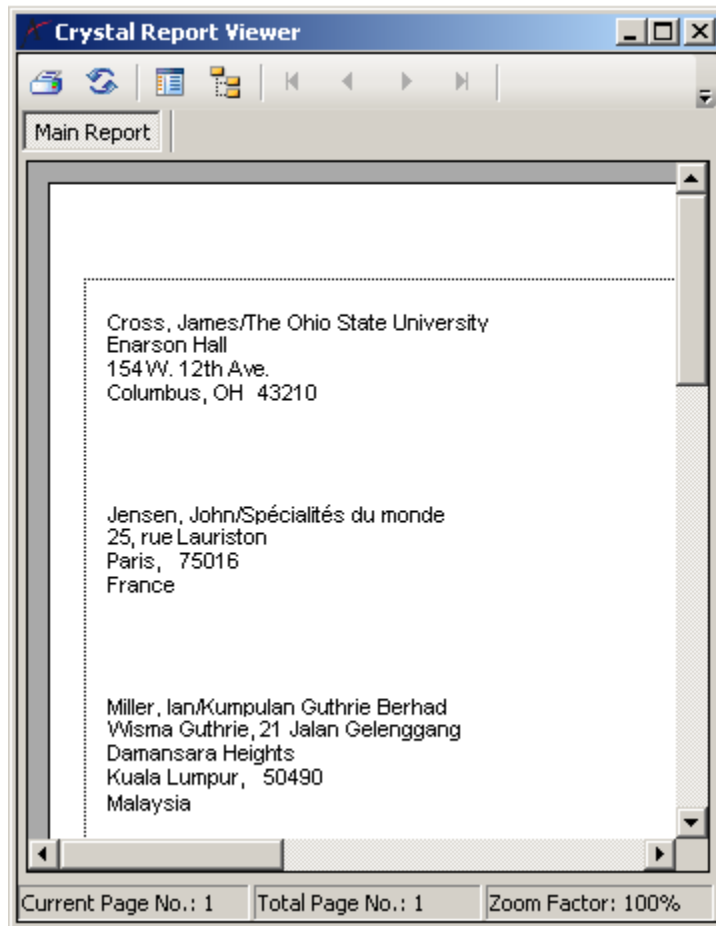
 The screenshot shows the "Recipients" tab selected in a software interface. At the top, there are tabs for "Recipients", "Output", "Comments", and "Attachments". Below the tabs is a "Create Recipient List" section with two radio buttons: "Use Subscription End Dates" (unselected) and "Use Vol. and Issue Number" (selected). A "Create List" button is to the right. Below this is a table with columns for Recipient and Subscription.

Recipient			Subscription				
Name	Company	Distributed By	Start Date	End Date	Sent	Left	Bulk
James Cross	The Ohio State	Hard Shipment	02/11/200	02/10/20	1	5	1
John Jensen	Spécialités du	Hard Shipment	02/11/200	02/10/20	1	11	1
Ian Miller	Kumpulan Gut	Hard Shipment	02/11/200	02/10/20	1	11	3

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. Select the **Publications** tab on your Subscription Product/Publications record.
2. Select the **Publication Contributors** sub-tab.
3. Click the **New** button on the toolbar to open a new Publication Contributors record.
4. Enter your **Person** in the **Person** field.
5. Select **Editor** from the **Role** drop-down list.
6. Leave **Commission Type** set to **Flat Amount**.
7. Enter **\$100.00** in the **Commission** field.
8. Leave **Primary In Role** selected (person is primary editor of the publication).

9. Click **OK**.
 - The contributor's record is added to the Publication Contributors tab.

Person	Role	Commission Type	Commission	Primary In Role
Tate, Lul Autho	Flat Amount		\$0.00	<input checked="" type="checkbox"/>

10. Click the **Prices** tab and add prices for the product.
11. **Save** and close the record.

Objective.....	E.1
Creating an Expos Record	E.3
Adding Expo Prices	E.4
Creating Floorplans	E.5
Creating Booths Using the Booth Generator	E.7
Using the Booth Combination Wizard	E.11
Linking Meetings to Expos.....	E.15
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Canceling an Expo Order	E.20
Using the Floorplan Copy Wizard.....	E.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 on the **Expo Management** dashboard.
2. Click **New Expo** 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. Enter **XYZ Expo** in the **Name** field (where *XYZ* are your initials).
4. Enter **Exhibits** in the **Category** field.
5. Click the **Expo** tab.

Expos > General Tab

6. The General tab appears.
7. Enter **XYZ Expo** in the **Expo Name** field (where *XYZ* are your initials).
8. Enter your **Company** in the **Vendor** field.
9. Enter your **Persons** record in the **Vendor Contact** field.
10. Enter next **Monday's** date in the **Start Date** field.
11. Enter next **Friday's** date in the **End Date** field.
12. Enter this **Saturday's** date in the **Setup Date** field.
13. Enter this **Sunday's** date in the **Setup Req. Date** field.
14. Click **Save**.

The screenshot shows a software interface for creating an Expo record. The window title is 'Products ID: 9924'. The main form has several fields: 'Name' (XYZ Expo), 'Category' (Exhibits), 'Type' (Expo), and 'Parent Product'. Below these is a navigation bar with tabs: 'Expos', 'Product Details', 'Web', 'Prices', 'Accounting', 'Comments', and 'Attachments'. The 'Expos' tab is selected, and within it, the 'General' sub-tab is active. The 'General' sub-tab contains the following fields: '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), and 'Setup Req. Date' (12/25/2016). Each date field has a calendar icon next to it.

Adding Expo Prices

Establishing prices for booth space at an Expo is different from 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

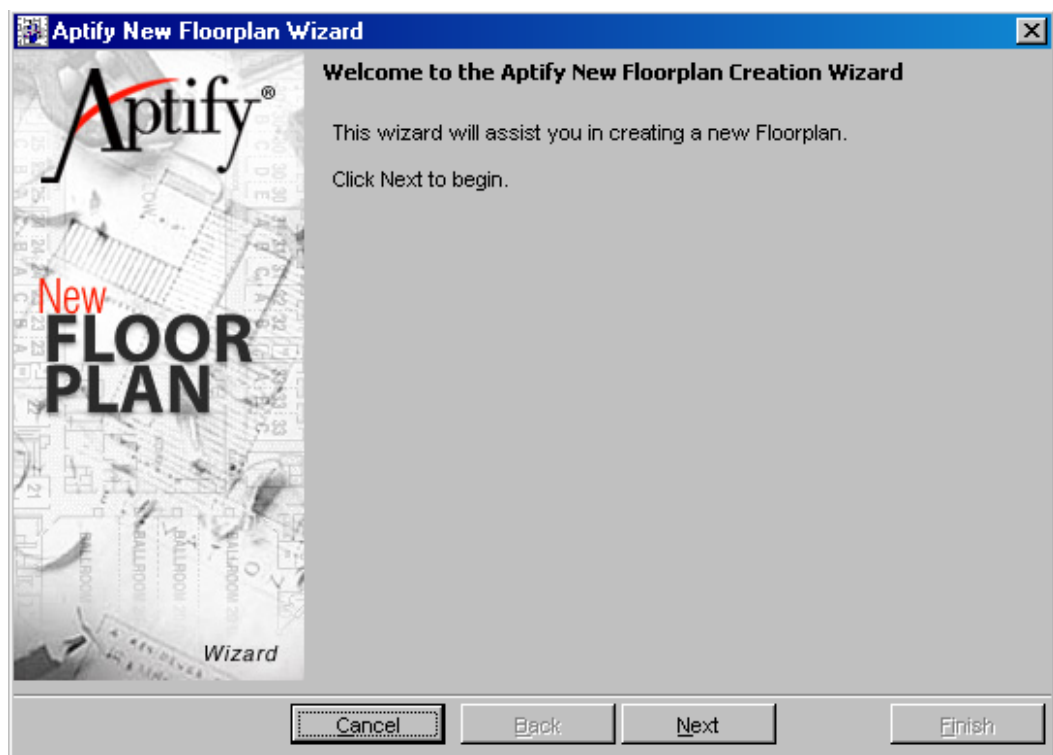
1. Click the **Prices** tab on your Expo record.
2. *Right click* in the gray area and click **New** to open a new **Prices** record.
3. Enter **Member Price** in the **Name** field.
4. Enter **\$100** in the **Price** field.
5. Select **Member** from the **Member Type** drop-down list.
6. Enter **Non-Member Price** in the **Name** field.
7. Enter **\$200** in the **Price** field.
8. **Select** the **Default** box to indicate that this is the default price for the product.
9. Select **Non-Member** from the **Member Type** drop-down list.
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.

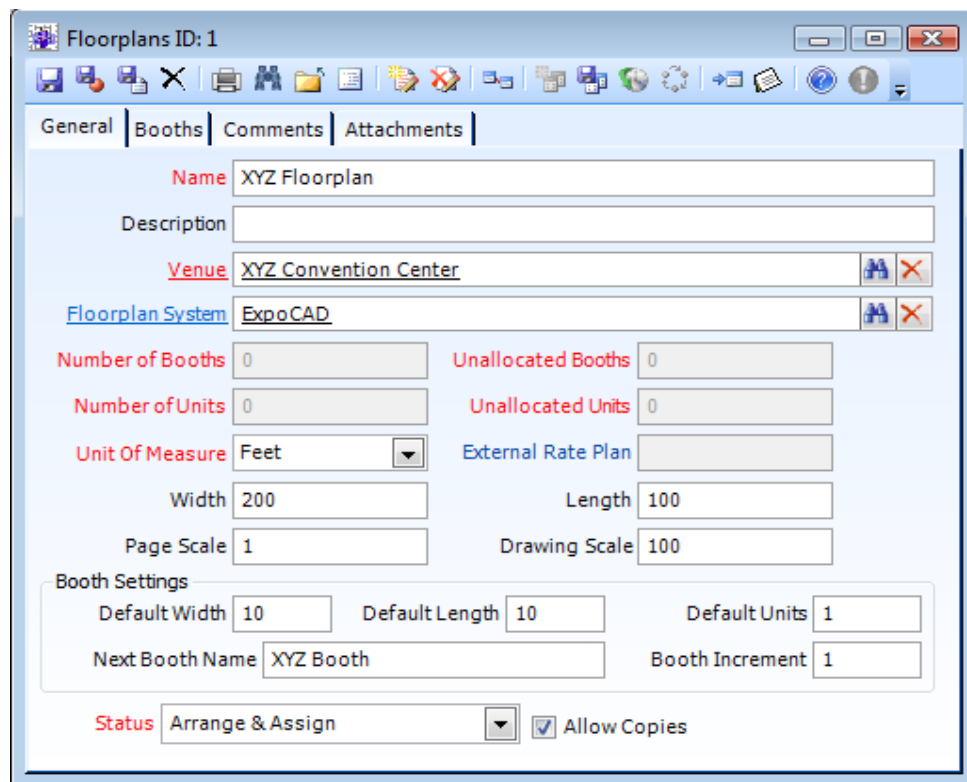
In this exercise, you will create a new floorplan.

1. Open the **Floorplans** tab
2. Open a **New Floorplans Record** link.
3. Click on 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. Enter **XYZ Expo Floorplan** in the **Name** field.
9. Enter **XYZ Convention Center** in the **Venue** field.
 - 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. Select **Feet** from the **Unit of Measure** drop-down list (if not already selected).
11. Enter **200** in the **Width** field and **100** in the **Length** field.
12. Enter **1** in the **Page Scale** field and **100** in the **Drawing Scale** field.
 - These two parameters form a ratio that defines the scale of the floorplan map. In this exercise, the scale is 1:100.
13. Enter **10** in the **Default Width** field.
14. Enter **10** in the **Default Length** field.
15. Enter **1** in the **Default Units** field.
 - In this exercise, the default unit size is a booth that is 10x10 (100 square feet).
16. Enter **XYZ Booth** in the **Next Booth Name** field.
17. Enter **1** in the **Booth Increment** field.
18. Select **Arrange & Assign** from the **Status** drop-down list.

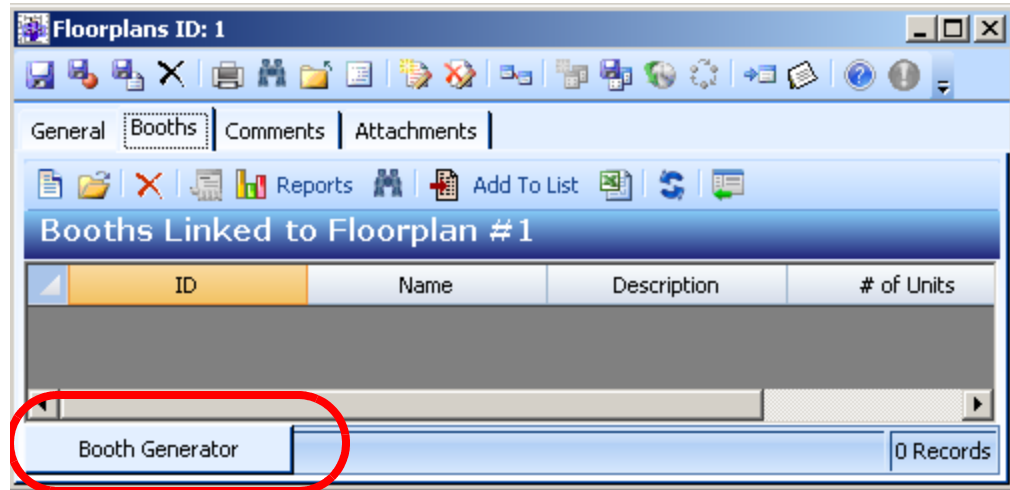


The screenshot shows the 'Floorplans ID: 1' configuration window. The 'General' tab is active. The 'Name' field contains 'XYZ Floorplan'. The 'Venue' field contains 'XYZ Convention Center' with a red link icon to its left and a delete icon to its right. The 'Floorplan System' field contains 'ExpoCAD' with a red link icon to its left and a delete icon to its right. The 'Number of Booths' field is 0, and 'Unallocated Booths' is 0. The 'Number of Units' field is 0, and 'Unallocated Units' is 0. The 'Unit Of Measure' is set to 'Feet' in a dropdown menu. The 'External Rate Plan' field is empty. The 'Width' field is 200 and the 'Length' field is 100. The 'Page Scale' is 1 and the 'Drawing Scale' is 100. The 'Booth Settings' section includes 'Default Width' (10), 'Default Length' (10), 'Default Units' (1), 'Next Booth Name' (XYZ Booth), and 'Booth Increment' (1). The 'Status' dropdown is set to 'Arrange & Assign' and the 'Allow Copies' checkbox is checked.

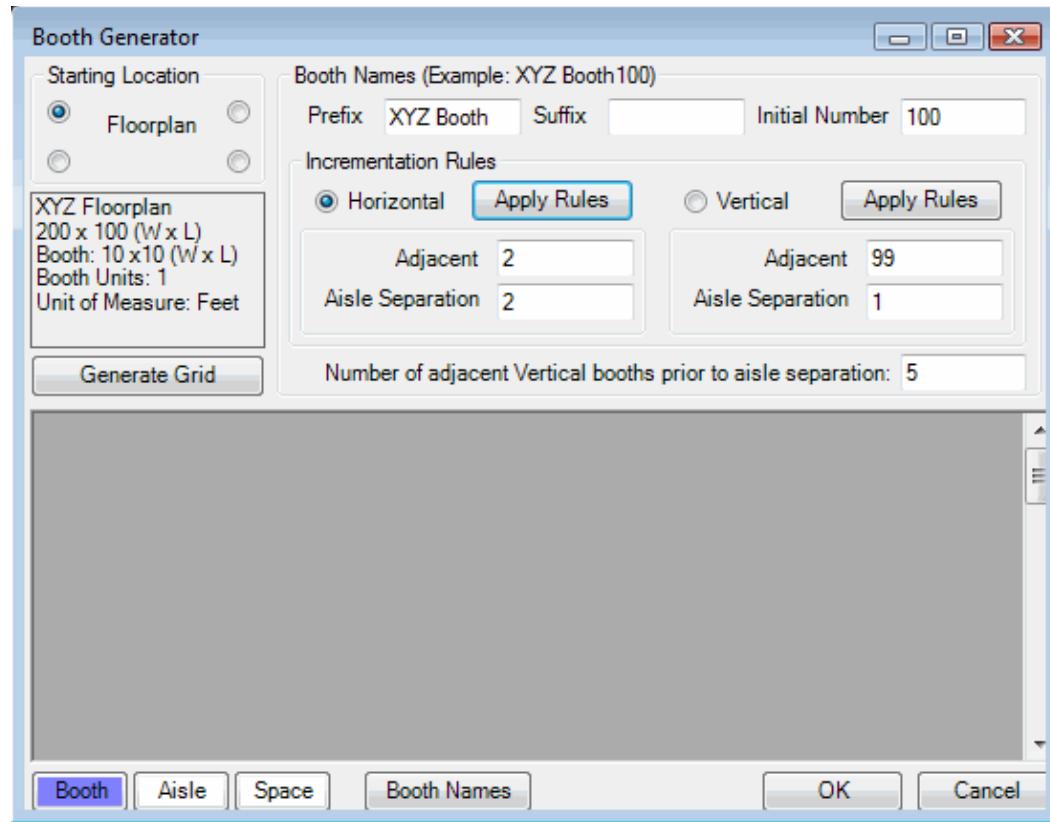
19. Click **Save**.

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.

The screenshot shows a software window titled "Booths ID: 1" with a standard Windows-style toolbar. Below the toolbar is a tabbed interface with the following tabs: "General" (selected), "Merged Booths", "Linked Registrants", "Comments", and "Attachments".

The "General" tab contains the following fields and sections:

- Name:** XYZ Booth100
- Description:** (empty text box)
- Floorplan:** XYZ Floorplan (with a thumbnail icon and a close button)
- XCoord:** 5
- YCoord:** 95
- Width:** 10
- Length:** 10
- # of Units:** 1
- Area:** 100
- Booth Registrant Information:**
 - Maximum #:** 3
 - Complimentary:** 0
- Surcharge:** Flat Amount (dropdown menu)
- Surcharge Amount:** \$0.00
- Merged
- Merged Into Booth:** (empty text box with a thumbnail icon and a close button)
- Order Information:**
 - Occupied
 - Linked Order:** (empty text box with a thumbnail icon and a close button)
 - Linked Person:** (empty text box with a thumbnail icon and a close button)
 - Linked Company:** (empty text box with a thumbnail icon and a close button)

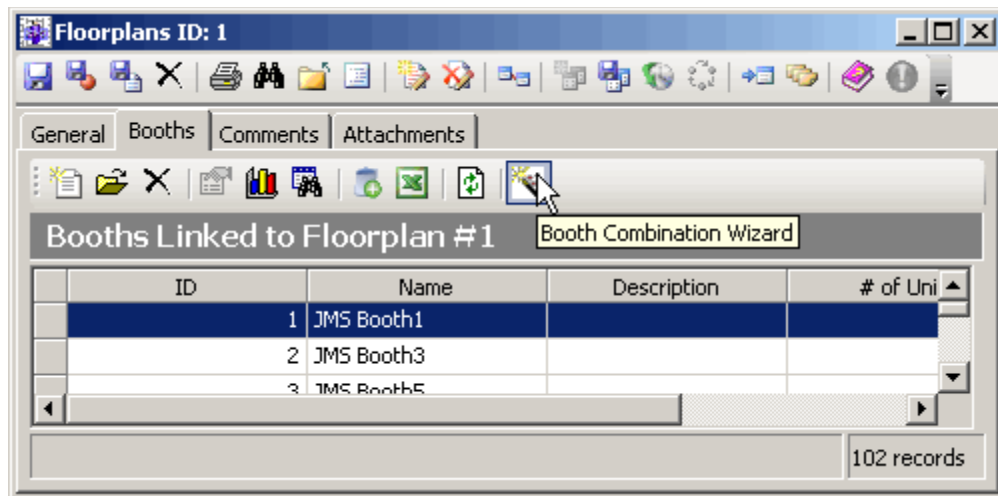
15. **Save** and **Close** the Booths record.

Using the Booth Combination Wizard

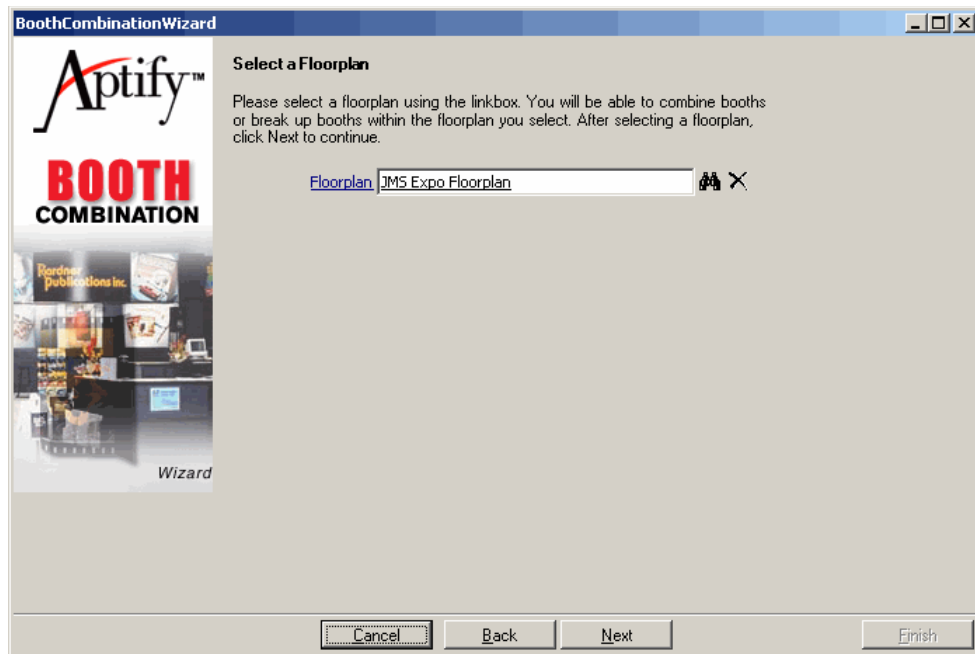
You use the Booth Combination Wizard to combine one or more booths into a larger booth or to break up a combined booth to two or more smaller booths.

Combining Booths

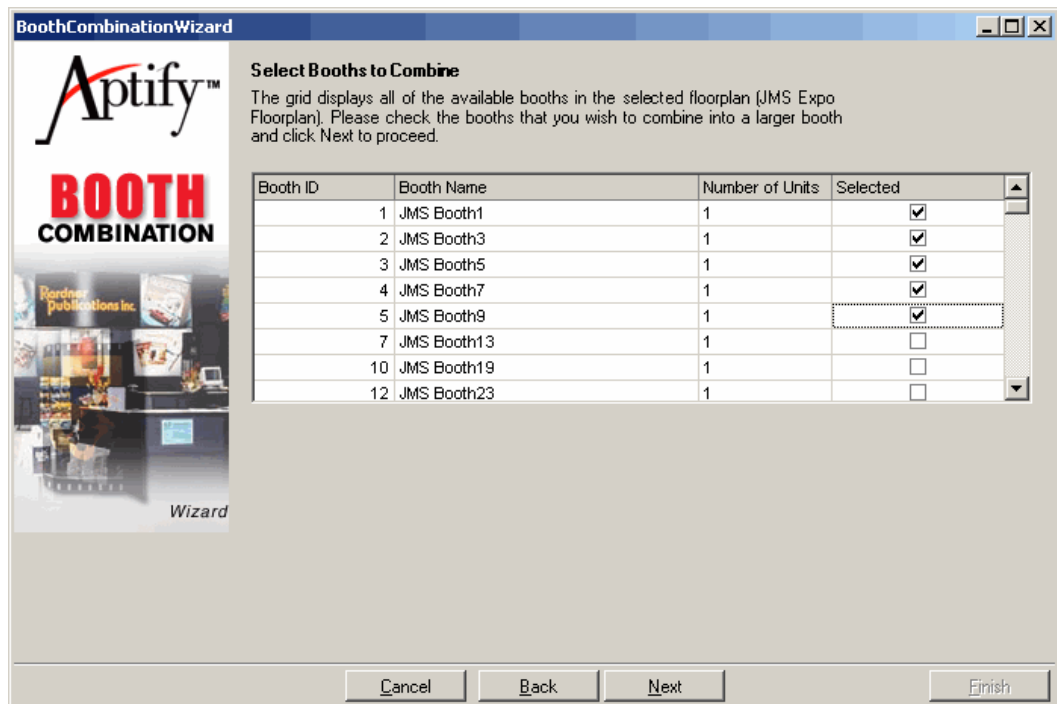
1. Open the *XYZ Expo Floorplan* record's Booths tab (if not already open).
2. Click the **Booth Combination Wizard** icon to launch the Booth Combination Wizard.



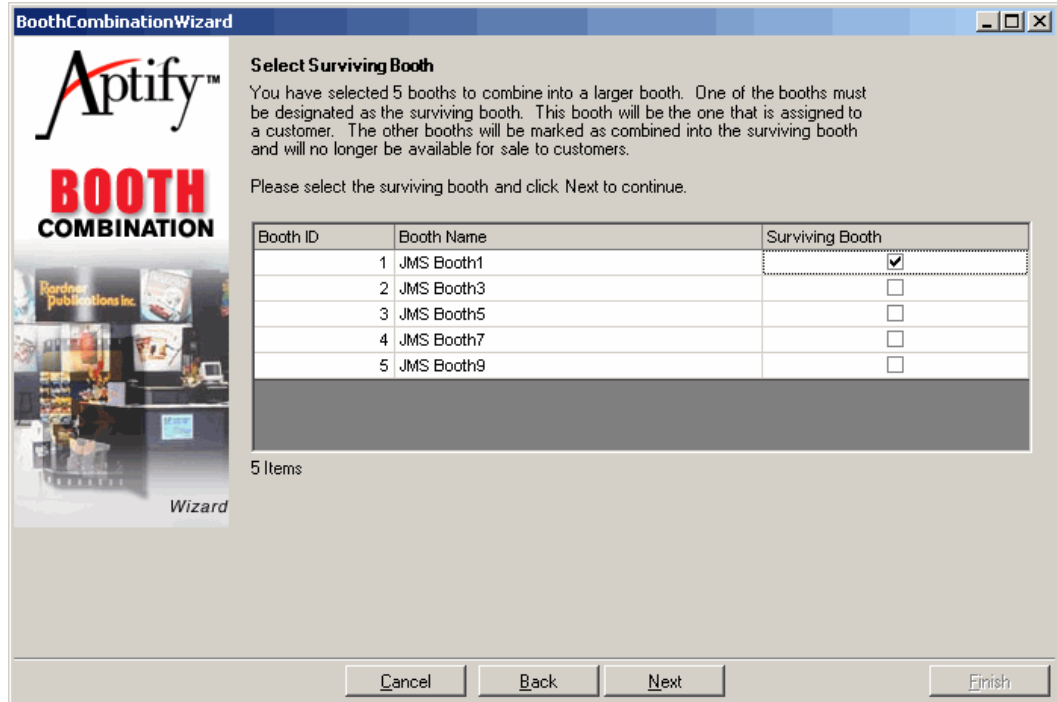
3. Click **Next** to continue.
4. Enter *XYZ Expo Floorplan* in the **Floorplan** field and click **Next**.



5. Select **Combine booth records to create a larger booth** and click **Next**.
6. Select the **Selected** checkbox 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. Select the **Surviving Booth** checkbox for Booth1 and click **Next**.



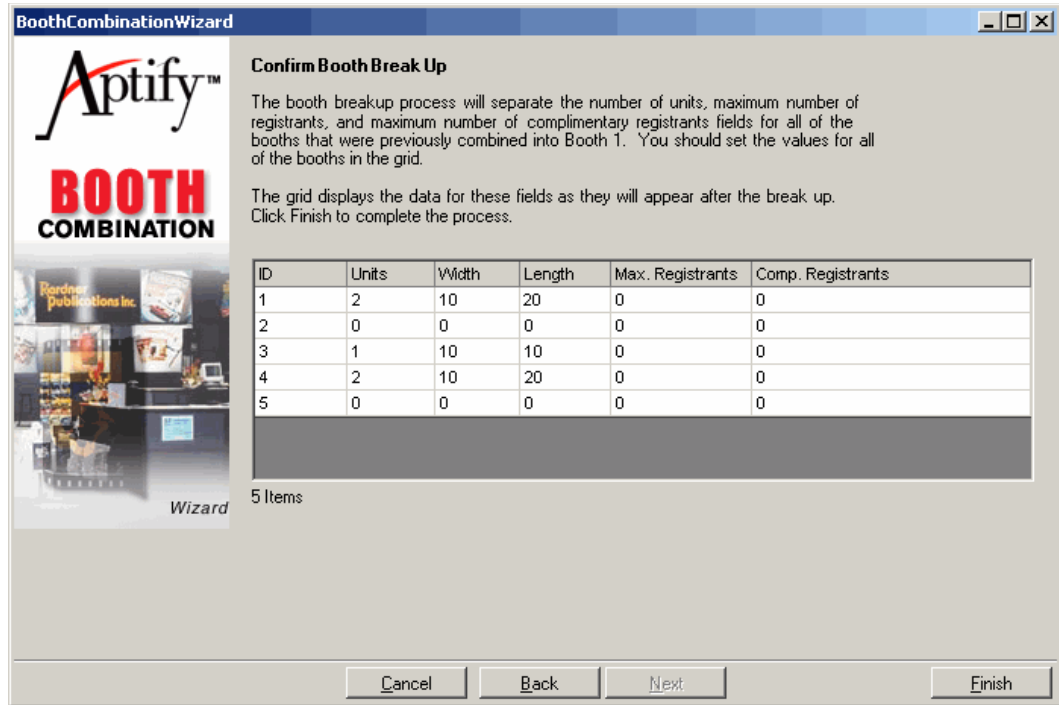
9. Review the settings for the new combined booth and click **Finish**.
10. Click **No** to combine another set of booths.

Separating Booths

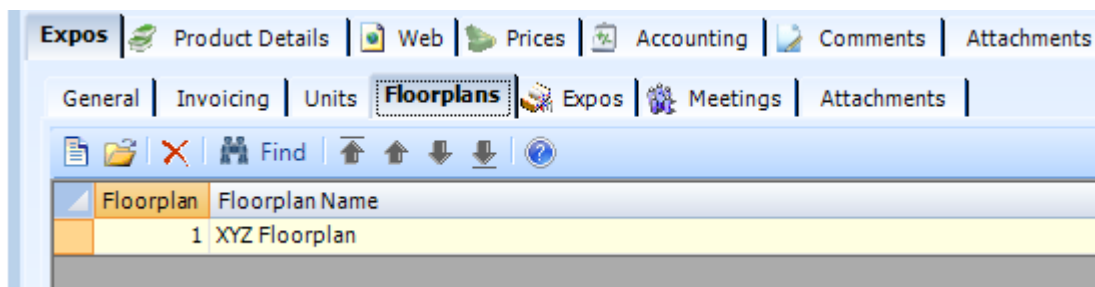
At times it may be necessary to separate booths after they have been combined. The Booth Combination Wizard offers the flexibility to separate booths.

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. Select the **Selected** checkbox 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.
 - Enter the first day of next month in the **Start Date** field.
 - Enter the third day of next month in the **End Date** field.
 - These are the same Start and End Dates as your Expo.
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 shows a software window titled 'Products ID: 9925'. At the top, there is a toolbar with various icons. Below the toolbar, the form contains the following fields:

- Name:** XYZ Management Conference
- Category:** Meetings
- Type:** Meeting
- Parent Product:** (empty)

Below these fields is a navigation bar with tabs: **Meetings** (selected), Product Details, Web, Prices, Accounting, Comments, and Attachments. Under the 'Meetings' tab, there are sub-tabs: **General** (selected), Meeting Logistics, and Registrations.

The 'General' sub-tab contains the following fields:

- Meeting Title:** XYZ Management Conference
- Start Date:** 12/26/2016
- End Date:** 12/30/2016
- Status:** Planned
- Meeting Type:** (empty)
- Coordinator:** Adam Smith
- Linked Expo:** XYZ Expo
- Meeting Conflict:** No ConflictValidation
- 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.

The screenshot shows the 'Expos' interface with a navigation bar containing tabs: **Expos** (selected), Product Details, Web, Prices, Accounting, Comments, and Attachments. Below the navigation bar, there are sub-tabs: **General**, Invoicing, Units, Floorplans, Expos, **Meetings** (selected), and Attachments. A toolbar with icons for Reports, Add To List, and other functions is visible above the table.

The table is titled 'Meetings Records Linked To This Record' and contains the following data:

ID	MeetingID	Product	Star
40	40	XYZ Management Conference	12/26/201

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 on 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 list if it is not the default floorplan.
8. Enter **XYZ Booth1** in the **Booth** fields.

The screenshot shows the 'Order Lines Record' dialog box with the 'Expos' tab selected. Within the 'Expos' tab, the 'Booths' sub-tab is active. The 'Floorplan' dropdown is set to 'XYZ Floorplan'. The 'Booth' field contains 'XYZ Booth100' and has a 'Configure' button next to it. The 'Booth Name' field also contains 'XYZ Booth100'. The 'Weight Required' field is set to '0'. The 'Configuration Type' dropdown is empty. Under 'Booth Options', there are six checkboxes: 'Needs Electric', 'Needs Water', 'Needs Compressed Air', 'Is Decorated', 'Needs Gas', and 'Needs Drain', all of which are currently unchecked. At the bottom, the 'Units' field is set to '1' and the 'Surcharge' field is set to '\$0.00'. 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

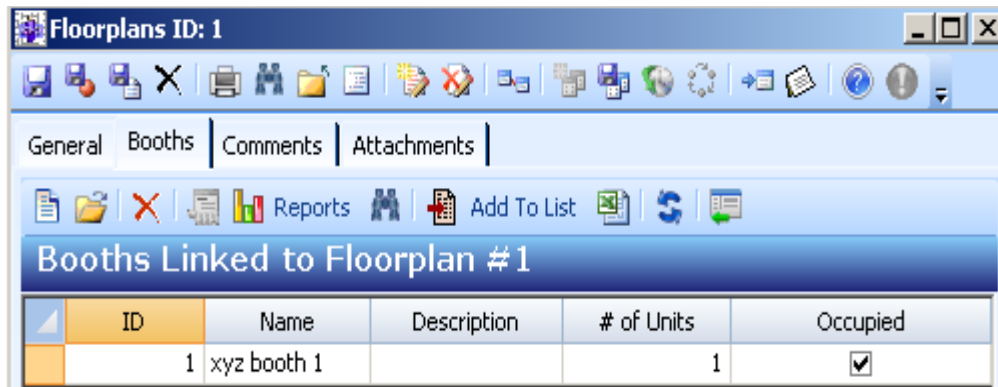
9. Click **OK** to return to the **Order** form.
10. Enter your saved **Credit Card** payment information.
11. Click **Save** and click **No** when asked if you want to ship the order.
12. **Add** an order line for 1 unit of **XYZ Management Conference**.
13. The **Order Line, Meetings, General** tab should automatically display.
14. Select the **Is Exhibitor** checkbox.
15. Select **XYZ Booth1** in the **Exhibitor Booth** field.

The screenshot shows the 'Order Lines Record' window with the 'Meetings' tab selected. The 'General' sub-tab is active. The form contains the following fields and values:

- Meeting Name: XYZ Management Conference
- Attendee: O'Connell, Dave/Aptify
- Badge Name: (empty)
- Badge Company Name: (empty)
- Badge Title: (empty)
- Registration Type: Pre-Registration (dropdown)
- Status: Registered (dropdown)
- Is Exhibitor: (checkbox, highlighted with a red circle)
- Exhibitor Booth: XYZ Booth100
- Show Name On List: (checkbox)
- Cancellation Date: (empty)

An 'OK' button is located at the bottom right of the form.

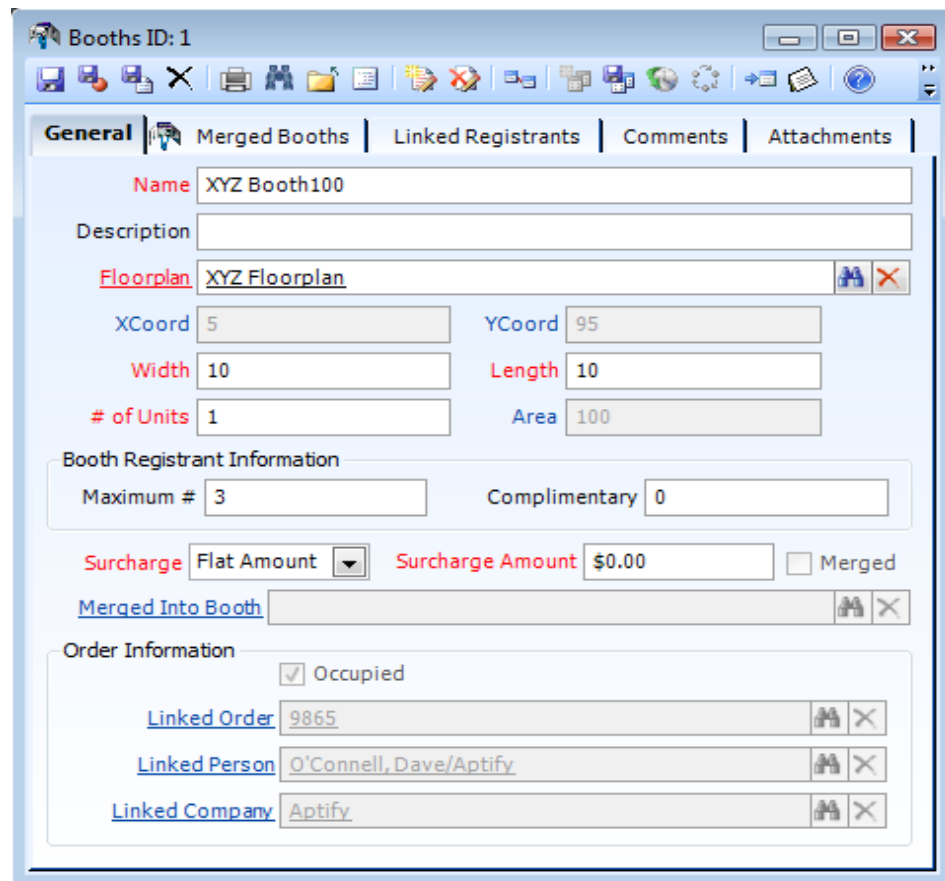
16. Click **OK** to close the Order Lines record and return to the order.
17. Save the order, and click **Yes** when prompted to pay the order in full using the specified credit card information.
18. Say **Yes** when asked if you want to ship the order.
 - The system ships the order and locks down parts of the order to maintain an accurate audit trail.
19. **Close** the order.
20. Click on the **Expo Management** application **Dashboard**.
21. Open the **XYZ Expo Floorplan** from the **Floorplans** View.
22. Click the **Booths** tab.
 - Notice that the **IsOccupied** box is now selected for **XYZ Booth1**.



The screenshot shows a window titled "Floorplans ID: 1" with a toolbar and tabs for "General", "Booths", "Comments", and "Attachments". Below the tabs is a sub-toolbar with icons for "Reports", "Add To List", and other actions. A blue header bar reads "Booths Linked to Floorplan #1". Below this is a table with the following data:

ID	Name	Description	# of Units	Occupied
1	xyz booth 1		1	<input checked="" type="checkbox"/>

23. Double-click the **XYZ Booth1** entry to open the corresponding Booths record.
- Notice that the order information now appears on the Booths record.



The screenshot shows a window titled "Booths ID: 1" with tabs for "General", "Merged Booths", "Linked Registrants", "Comments", and "Attachments". The "General" tab is active, displaying the following fields:

- Name:** XYZ Booth100
- Description:** (empty)
- Floorplan:** XYZ Floorplan
- XCoord:** 5, **YCoord:** 95
- Width:** 10, **Length:** 10
- # of Units:** 1, **Area:** 100
- Booth Registrant Information:**
 - Maximum #:** 3, **Complimentary:** 0
- Surcharge:** Flat Amount (dropdown), **Surcharge Amount:** \$0.00, Merged
- Merged Into Booth:** (empty)
- Order Information:**
 - Occupied
 - Linked Order:** 9865
 - Linked Person:** O'Connell, Dave/Aptify
 - Linked Company:** Aptify

24. **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. Select the checkbox 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.

	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:

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.

The screenshot shows a software window titled "Booths ID: 1" with a standard Windows-style toolbar. Below the toolbar are several tabs: "General", "Merged Booths", "Linked Registrants", "Comments", and "Attachments". The "General" tab is active and contains the following fields:

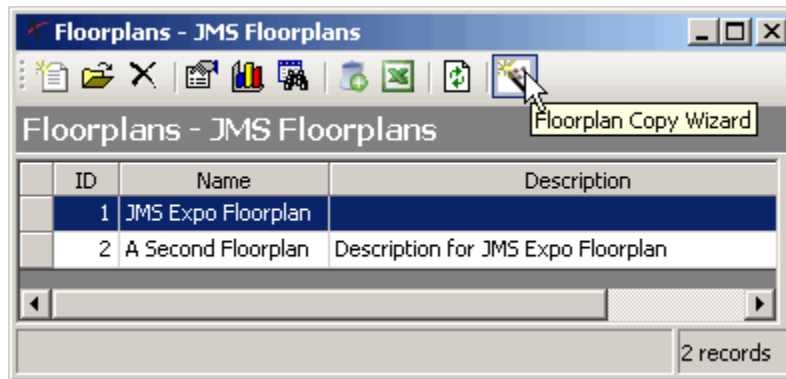
- Name: JMS Booth1
- Description: (empty)
- Floorplan: JMS Expo Floorplan (with a small icon and a close button)
- XCoord: 5, YCoord: 95
- Width: 10, Length: 20
- # of Units: 2, Area: 100
- Booth Registrant Information: Maximum # 5, Complimentary 0
- Surcharge: Flat Amount (dropdown), Surcharge Amount \$0.00, Merged (checkbox)
- Merged Into Booth: (empty) (with a small icon and a close button)
- Order Information (highlighted with a red box):
 - Occupied (checkbox)
 - Linked Order: (empty) (with a small icon and a close button)
 - Linked Person: (empty) (with a small icon and a close button)
 - Linked Company: (empty) (with a small icon and a close button)

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.

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

G

Quick Reference Guides

Objective

Users will be able to:

- Use the accompanying Quick Reference Guides for understanding of frequently used parts of the system
- Print out the guides separately for quick reference use

Overview

Aptify Quick Reference Guides are designed to help users with frequently used parts of the system. On the following pages users will find Guides that cover the following topics:

- Creating List Views
- Managing Views
- Reports
- Record Management
- Contact Log
- Membership and Subscription Renewal

Quick Reference Guides should be copied out of the manual when needed. A good practice is to hang these guides on your cube wall for use when first using the system. The Guides act as functional, step by step reminders of how to conduct the frequently used operations of Aptify.

Managing Views QRG



Creating Shortcuts

1. Select the desired **View** from the **Navigation Bar**
2. Select the desired **Shortcut Group** by clicking on it - this may contract the **Group** - click again on the bar to expand
3. Right click on the desired **View** in the **Navigation Bar** and select **Add to Shortcut Bar**
 - a. If one or more shortcuts exists under the Bar, the new View will be placed at the bottom of the Group

Managing Shortcuts

1. Right Click on an existing **Shortcut Group**
2. **Shortcut Menu Bar** will display with following options:
 - a. Add Group
 - b. Remove Group
 - c. Add Item - Displays Views Search (This can be used as an alternative to steps 1-3 above)
 - d. Small Images
 - e. Small Images with Text
 - f. Large Images
 - g. Large Images with Text
 - h. Large Images with Text Below
3. Users can move **Groups** by **Dragging** them
4. Users can move **Views** within a Group OR from Group to Group by **Dragging** them
NOTE: Users can also Drag and Drop **Views, Services, and Folders** to the Shortcuts area from the Folder List

Creating a View Template

1. Open the **Properties** of a View - Configure the **Properties** as desired
2. Click on the **Save Template...** button in the lower left hand corner
3. The **Save Template** dialog box will display: Enter the **Name** of the Template
4. Save to the applicable **Category** for the Template
5. Users can create **New Categories** to aid in organizing their View Templates
 - a. Remember – View Templates are visible to ALL users of that service, not just the creator
 - b. Check if your Department function has already created a folder
6. To Load the View template, create a new View from that service
7. Click on **Load template...** button in the lower left hand corner
8. Select the desired View template from the dialog box - All View templates are visible by all users

Creating Shared Folders

1. Right click on the desired **Service**
2. Select **Create Folder**
3. **Create Folder** box displays
4. Enter a **Name** and **Description**
5. Click on the **Share this Folder** box

Connecting to Shared Folders

1. Right click on the desired **Service**
2. Select **Connect to Shared Folder**
3. **Connect to Shared Folder** box displays
4. Expand the desired **User** to connect to under the **All Users** list
5. Select the desired folder to connect to: **Folder** displays within the **Service**
6. To **Edit** a View from a **Shared Folder**:
 - a. User must Right click on the View in the Navigation Bar
 - b. Select Copy the View
 - c. User must Right click on the Service in the Navigation Bar
 - d. Select Paste the View
 - e. Copied View will display within the Service labeled "Copy of..."

NOTE: IF Shared Folder edited by Owner, users will automatically receive the updates – this enables the Owner (managers/administrators) to update/edit views.

Creating View Tips

1. Consider the Use of the View

- a. Data mining (Excel Integration & Reports)
- b. Communication - Track records needing attention, processing (Dashboards & Wizards), updates
- c. Searching for records (prompted views)
- d. Dashboard

2. Filter linked fields based on ID instead of Name

- a. No spelling mistakes and no problems when the field name changes
- b. The Basic Find dialogue is much cleaner than a drop down list of only 100 results

3. Use Prompts with Default Values

- a. Ensures future user of the view will know about that criteria
- b. Only one extra click, no actual editing required

4. Watch your Filter Logic

- a. Scenarios exist where the Filter Logic will reset to all AND statements - ex. if you delete a criteria
- b. If editing Filter criteria, always display Advanced area – will be visible

5. Get rid of Unnecessary Columns

- a. Tempting to include any/all Fields or leave all default Fields displayed
- b. Avoid a displayed scroll bar – trim view to usable fields.

6. Clean up your Column Headings

- a. On Fields tab - Display Name & Description– replace cryptic field names/descriptions with sensible ones
- b. On Format tab, check Use Custom Formatting..., Wrap Caption – displays heading w/out white space

7. USE the Preview Pane & Hierarchy

- a. Provides tons more information per List View entry
- b. Preview Pane can be set to a different template per View

Managing Views QRG

1. End Users

- a. Use the Shortcuts bar
 - i. DO NOT use the Folder List! Do you use Windows Explorer to find a Word doc!?
 - ii. Use Shortcuts bar to organize Views topically and mix together different services
 - iii. Display the high usage views - avoids the confusing Folder List
- b. No really...start using the Shortcuts bar!
 - i. Start using NOW - right click on Views you use and SHORCUT THEM!
 - ii. 10 minutes – end of day – organize them
 - iii. Right click on Shortcut Group for different formats – try Small Icon w/Text
- c. Create a "Trash" folder in each service for one-time-use views
 - i. Dump one time use views in folder
 - ii. Create one-time use views inside the Trash folder
 - iii. Keeps list of views from becoming cluttered
 - iv. Periodically purge your "Trash" folders
- d. Once connected to a Shared Folder, logically rename it if needed
 - i. Avoid displaying multiple folders all named "Shared Views"
 - ii. The owner still controls original folder name in their Folder List
- e. Make sure the view can be easily identified based on its Name
 - i. Use Description area to add detailed explanations for complex views

2. Administrators

- a. Concentrate core shared views into minimal folders
 - i. Avoid core views spread across folders - creates confusion/ frustration for end users
 - ii. End users connect to fewer shared folders, reduced clutter/concentrated update area
- b. Standardize approach to how CORE views are stored:
 - i. One person per functional team responsible for team's shared views
 - ii. One person responsible for the shared views in each service
 - iii. All organization-wide shared views transferred to the sa account
- c. Create a summary document of available shared views
 - i. Enables users to avoid reinventing the wheel
 - ii. Admins can create a View of Views to see ALL users Views – can print/export for managers
- d. Clean up Display Names and Descriptions on Entities records
 - i. It will be easier for end-users to figure out what fields they should use on Filters and Fields tabs
 - ii. Make sure Display Names will look appropriate in alphabetical order
 - iii. Add "XX" or "DO NOT USE" to the Display Name of stock Aptify fields that your association doesn't use to avoid accidental use
- e. Create View Templates where specific set of filters ALWAYS need inclusion
 - i. Improves the odds that the set of filters will be built correctly
 - ii. Allows end-users to then enhance the view based on specific needs

Aptify Training and Education

To arrange for On-Site, Scheduled, or Ad Hoc training please feel free to contact Renee.Thorpe@aptify.com or dave.oconnell@aptify.com

Use the following worksheet to frame your ideas of views you will use in your everyday job.

Name Two Groups		Create your own views Worksheet		
Identify Two Views under each Group				
Group 1				
Name				
Purpose				
Filters	S	F	O	V
1				
2				
3				
4				
5				
Name				
Purpose				
Filters	S	F	O	V
1				
2				
3				
4				
5				
Group 2				
Name				
Purpose				
Filters	S	F	O	V
1				
2				
3				
4				
5				
Name				
Purpose				
Filters	S	F	O	V
1				
2				
3				
4				
5				