

Creating new activities

To create a new activity:

- 1 Click on the **New** button.

The screenshot shows a window titled "Activity - Reminder to test the program". The window has a menu bar with "File" and a toolbar with "Save & Exit", "Save & New", "Cancel", "Delete", "Recurrence", and "Mark Complete". The "Details" tab is active, showing the following fields:

- Activity Type: Appointment (dropdown)
- Type: To Do (dropdown)
- Sync with Outlook:
- Subject: Reminder to test the program
- Company: (empty text field)
- Phone: (empty text field)
- Contact: (empty text field)
- Phone: (empty text field)
- Mobile: (empty text field)
- Job Code: (empty text field)
- Opportunity: (empty text field)
- Campaign Wave: (empty text field)
- Label: Business (dropdown)
- Status: In Progress (dropdown)
- Assigned To: DAVID CRANSTON, GREG MANNING (dropdown)
- Priority: Normal (dropdown)
- Assigned By: EXO BUSINESS ADMIN ACCOUNT
- Start time: 13/05/2013 (dropdown)
- All day event:
- End time: 13/05/2013 (dropdown)
- Reminder: 15 minutes (dropdown)
- Show time as: Tentative (dropdown)

New Task Screen

- 2 From the **Activity Type** dropdown list, select either **Appointment** or **Task**.
- 3 Select the **Type** of event (estimate, new business, to do, etc). This list can be edited by selecting the option **Edit List**.
- 4 Select the option **Sync with Outlook** to synchronise this event with the corresponding type in Outlook.
- 5 Enter the **Subject** details - this will appear in the task scheduler window.
- 6 To link the task to a company, enter the **Company**.
- 7 To link the task to a contact, enter the **Contact**.

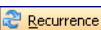
NOTE

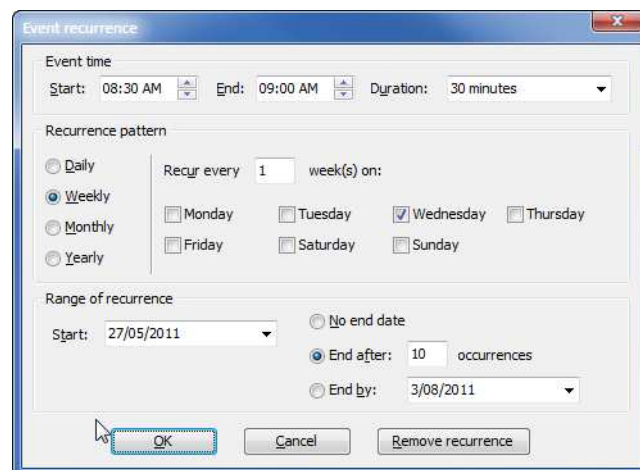


If EXO CRM is installed and licensed, fields will be available to track the **Opportunity** and **Campaign Wave** that generated this Activity. A double Click on the campaign will open up the campaign for a user with EXO CRM access.

- 8 Enter a **Label** as required (***Important, Personal, Must Attend***, etc). These options cannot be edited.
- 9 From the **Status** dropdown list, select the appropriate status for the activity (***In Progress, Completed, Deferred***, etc). This list can be edited by selecting the option ***Edit List***. If the **% Completed** is set a value between 0.00% and 100.00%, this field will be automatically set to ***In Progress***.
- 10 To assign the activity to another staff member or multiple staff members, select their name from the **Assigned To** dropdown. The activity will appear in their own list the next time their screen refreshes.
- 11 Select a **Priority** of ***Low, Medium*** or ***High***. These options cannot be changed.
- 12 If the **Activity Type** is set to *Task*, a **% Complete** field will be available to track the progress of the task. Depending on the **Status**, this field will be automatically set to one of the following:

Status	% Complete
Not Started	0.00%
Completed	100.00%
Any other option	25.00%

- 13 A **Reminder** can be set to provide an alarm at the designated time prior to the scheduled event start.
- 14 Amend the **Start and End Time/Date** as required, or click on the  icon in the toolbar to set up a recurring event. (The following shows a regular event from 8.30 - 9.00 every Wednesday for 10 weeks.)



Task Recurrence Screen

- 15 Add **Notes** to the activity as required in the lower panel.

16 Click **Save & Exit** or **Save & New** to save the activity.

The Calendar view offers several options for creating new activities:

- Clicking on the **New** button.
- Double-clicking on a time slot on the calendar to create an activity at that time.
- Right-clicking on a time slot on the calendar to create an activity at that time.

TIP



The right-click menu also contains options to create an all-day activity or a recurring activity.

- Double-clicking on a blank area of the Task list.

Synchronising activities with Outlook

EXO CRM allows activities (Tasks and Appointments) to be synchronised between MYOB EXO Business and Microsoft Outlook. When activities are synchronised, the following updates occur:

- Any new activities in EXO Business are exported to Outlook.
- Any new activities in Outlook are imported to EXO Business.
- Any existing activities that have been modified in either system are updated in the other system.

In all cases, the distinction between Tasks and Appointments is preserved, e.g. activities that exist as Tasks in EXO Business will appear as Tasks in Outlook after activities are synchronised.

IMPORTANT



When updating existing activities, the synchronisation process uses the most recently updated activity as the "master" and copies this to the other system. This means that if the same activity is edited in both systems before activities are synchronised, only the most recent changes will be saved.

TIP

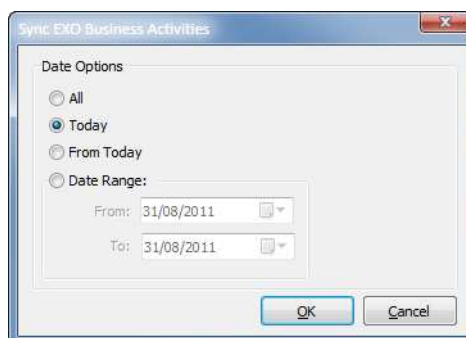


Separate **Import from Outlook** and **Export to Outlook** functions are also available to perform a one-way synchronisation of Activities in either direction.

To synchronise all activities in a specified date range:

- 1 Click the **Tools** button on the toolbar and select **Sync Activities with Outlook**.

2 The following window opens:



Synchronise Activities with Microsoft Outlook

3 Specify which activities to synchronise by selecting one of the following **Date** options:

Date Option	Description
All	All the activities will be synchronised with Outlook.
Today	Only today's activities will be synchronised with Outlook.
From Today	Only activities from today onwards will be synchronised with Outlook.
Date Range	Enter a specific date range of activities to synchronise with Outlook.

4 Click **OK**.

To synchronise specific activities in the List View:

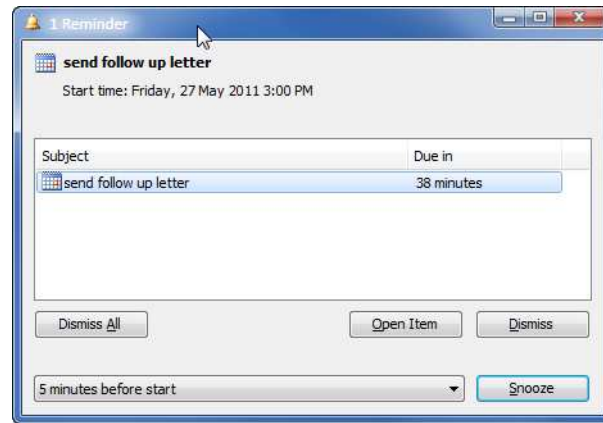
- 1 Click on the selection boxes of all activities you want to synchronise.
- 2 Right-click anywhere on the list and select **Selected Items > Export to Outlook** from the pop-up menu.

Functions are also available to perform a one-way synchronisation of activities:

- Click the **Tools** button and select **Import Activities from Outlook** to import activities from Outlook.
- Click the **Tools** button and select **Export Activities to Outlook** to export activities to Outlook.

Respond to reminders

If a reminder has been set, at the designated time you will receive a reminder of the activity via an alarm icon (🔔) on the task bar of your windows screen. Double click on the alarm icon to bring up the reminder window.



Task Reminder Screen

You can respond in one of four ways:

- **Dismiss All** will dismiss all reminders in the reminder screen.
- **Open Item** will open the task for review and editing.
- **Dismiss** will dismiss the currently selected reminder.
- **Snooze** will enable you to “snooze” and be reminded again in the specified timeframe (10 minutes by default).

Setup a new Creditor

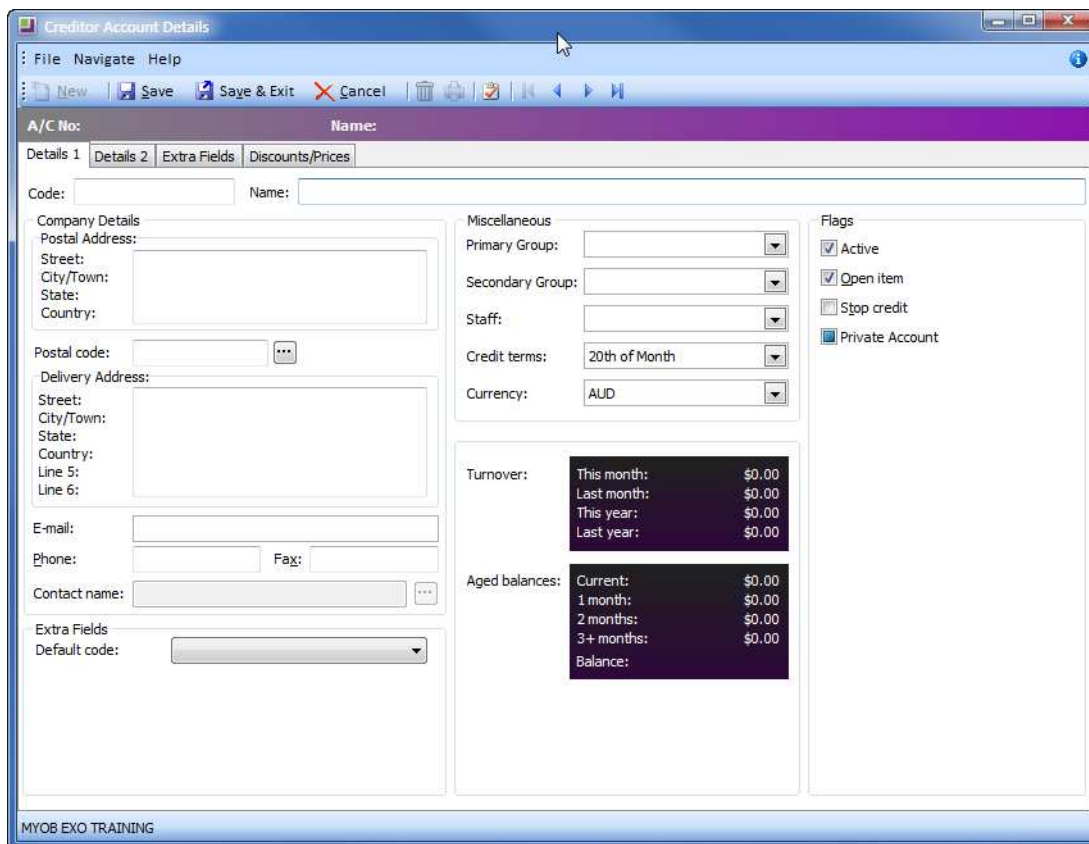
Accounts > Creditors

The creditor screen is very similar in layout to the new debtors screen. While the process for setting up a new creditor is relatively straightforward, you will need to consider a number of additional factors such as what groups the creditor will belong to, the credit terms available from that creditor, payment defaults, etc. These issues can be discussed with your implementing partner or systems manager.

To set up a new creditor:


- 1 Navigate to the creditors search screen via the drop down menus **Account > Creditors**.
- 2 Search for the creditor by typing part of the creditor name and pressing **Enter** to check that they are not already entered.
- 3 Click on the **New** button to create a new creditor.

Details 1 tab



New Creditor: Details 1 tab

1 Enter Primary Details:

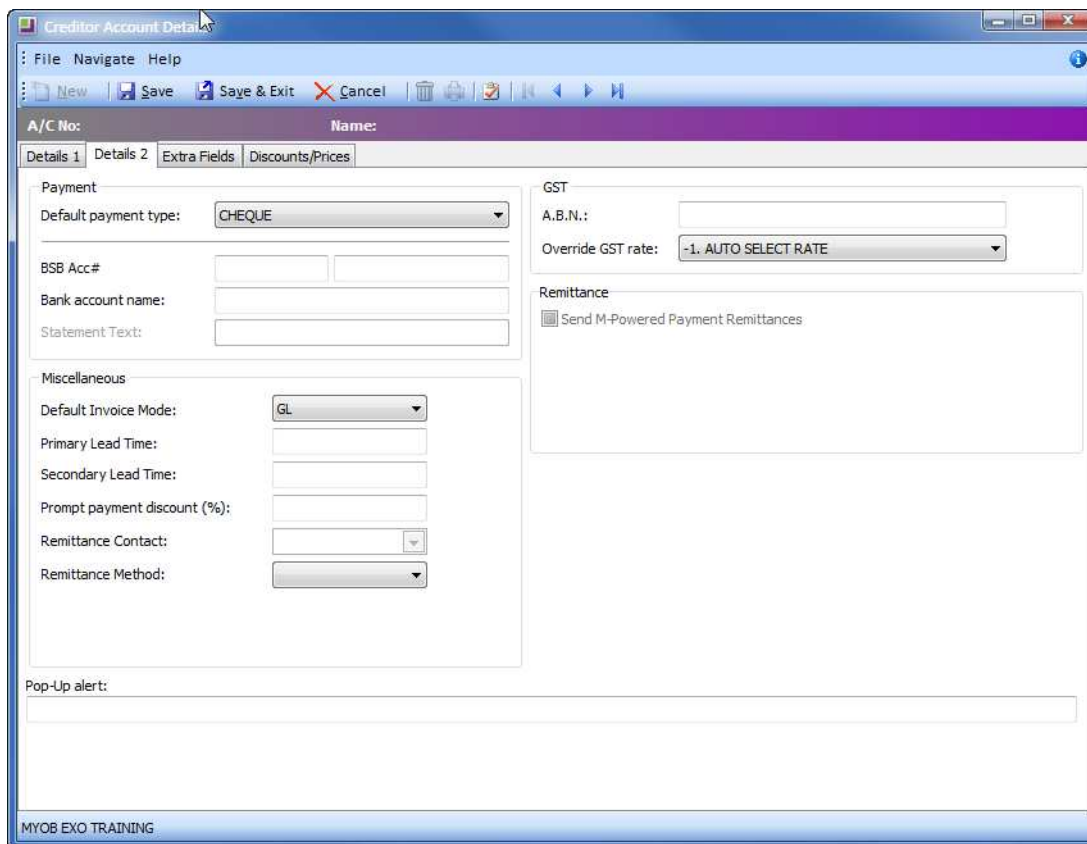
Section	Description
Account name & Code	EXO Business will generate a code based on the name that you give the creditor. This can be overwritten if required.
Delivery and Postal Address	Ensure that you enter the details in the correct fields (use the Enter key). If you choose not to enter a separate delivery address, then the postal address will be replicated once the creditor account is saved.
E-mail, Phone, Contact Name	To enter a contact name on the Details1 screen, a contact must first be entered into the Contacts tab. Then click the  icon in the menu bar. 'Working with Contacts' on page 45 to review the procedure for adding a contact.

Extra fields - Default Code	This enables you to specify a default GL account code to be entered automatically when generating a new invoice or purchase order for this creditor. For example, you may like to assign your cleaning company the default code of 3250: Cleaning.
Purchasing Groups	Primary and Secondary purchasing groups are setup by your implementing partner. Ensure that you select the correct ones so that reporting and purchasing activities are based on accurate information.
Credit Terms	The different credit terms available have been set up by your implementing partner. Choose the appropriate period and credit limit that applies for this creditor.
Currency	Enter the appropriate currency. It will default to AUD (for Australian databases) or NZD (for New Zealand databases). Note: Make sure that the currency is correct as it cannot be changed once the creditor account is saved. If the currency changes a new creditor should be opened.

2 Review Account Flags checkboxes:

Option	Description
Active	Select to make the account active.
Open Item	Enables the allocation of payments to specific invoices.
Stop Credit	This option enables you to stop invoices being posted to this account.
Private Account	This option restricts access to designated staff only.

Details 2 tab



New Creditor: Details 2 tab

1 Enter Secondary Details:

Section	Description
Default payment type	This must be cheque or D/Credit for the creditor account to appear in Creditors Payment Processor.
Bank, Branch, Account, Suffix	These details are used when using the direct credit feature in Creditors Payment Processor.
GST number	Note: The GST is not a required field so MYOB EXO Business will not remind you if it has not been completed.
Override GST Rate	It is recommend that the GST rate is left at 1-Auto Select Rate. This will utilise the default rate for creditors that is set up during implementation. Refer to your implementation partner or system supervisor if you are unsure.

Default Invoice mode	This specifies whether new invoices created for this creditor will be stock invoices or default to GL codes. Refer back to the Details 1 tab to enter a specific default code (i.e. Rent and Rates).
Primary Lead Time	Delivery lead time in days.
Secondary Lead Time	Alternative delivery lead time in days.
Prompt Payment Discount (%)	Enter a prompt payment discount % for this creditor. A prompt payment discount calculation button will become available on the creditor payment screen when making payments to this creditor within the prompt payment timeframe.
Remittance Method	From the dropdown list, select the method used to send remittance advices to this creditor. (Print/E-mail)
Remittance Contact	From the dropdown list, select the contact to which remittance advices will be sent if the Remittance Method is set to E-Mail
Pop-up Alert	This field allows you to enter an alert (such as “check for sale items when ordering” or “only order through John” to appear when entering transactions to this account.

Extra Fields

If any extra fields have been set up for your organisation, enter the information as appropriate under the Extra Fields tab.

Click on the **Save button** to save the account details. Other tabs will now be available to enter additional information (such as Contacts, Transactions, Orders, Relationships, Activities, etc). Information about these tabs has been discussed in prior sections.

Assign a Contact

Once you have entered and saved the basic creditor details, additional tabs become available for entering further information. Refer to ‘*Working with Contacts*’ on page 45 for details about entering contacts and assigning contacts to an account.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Create a new Debtor record	
Create a new Contact	
Create a new Non-Account record	
Create Activities	
Create a new Creditor record	

Reports & Dashboards

3

In this unit you will learn the basic functionality to access reports and create and utilise dashboards layouts.

By the end of this unit, you will be able to:

- ▶ Print, view and export standard reports using Clarity Report Browser and the Dashboard.

Reports

EXO Business's reporting capacity is extensive and there is a vast number of standard reports available. In addition there are a number of tools which allow you to customise and design your own reports and forms as well as produce graphical analysis of information.

Available reports can be viewed via:

Clarity Report Browser

The **Clarity Report Browser** shows all available reports categorised into functional areas. Reports can be previewed, run or added to a user's menu as required.

Dashboard

The **Dashboard** enables each user to display data using widgets created in EXO Analytics.

Functional menu reports drop down

The functional menu reports drop down is located on the lower left hand corner of the main screens (ie Sales, Purchases, Stock, etc). The drop down will show reports that relate to the screen you are currently viewing. For example, on the **Sales** screen the reports drop down will show reports that relate to either **Sales**, **Sales Orders** or **Debtors**. Individual reports can be selected from the drop down menu.

EXO Analytics

EXO Analytics presents a customisable overview of the organisation's business status. It is intended for use by management to monitor business performance.

Customise/edit reports

Sales Analysis Designer

The *Sales analysis designer* accesses a core of eight basic report types which can be used to analyse sales. Two groupings can be used, and sales can be grouped by stock (primary and secondary group), debtors (primary and secondary group), location, branches or sales rep. Multiple selection criteria / conditions can also be incorporated into the analysis.

NOTE



Refer to the EXO Advanced Reporting training manual for instructions on how to set up and use the Sales Analysis Designer.

Clarity Report Designer

The **Clarity Report Designer** is a complex utility which can be used to modify existing reports and forms or create entirely new ones. It accesses data from the database tables and presents them using a completely customisable format.

While there is a whitepaper on using Clarity Report Designer, it is generally recommended that interested users attend separate training in Clarity before attempting to generate new reports.

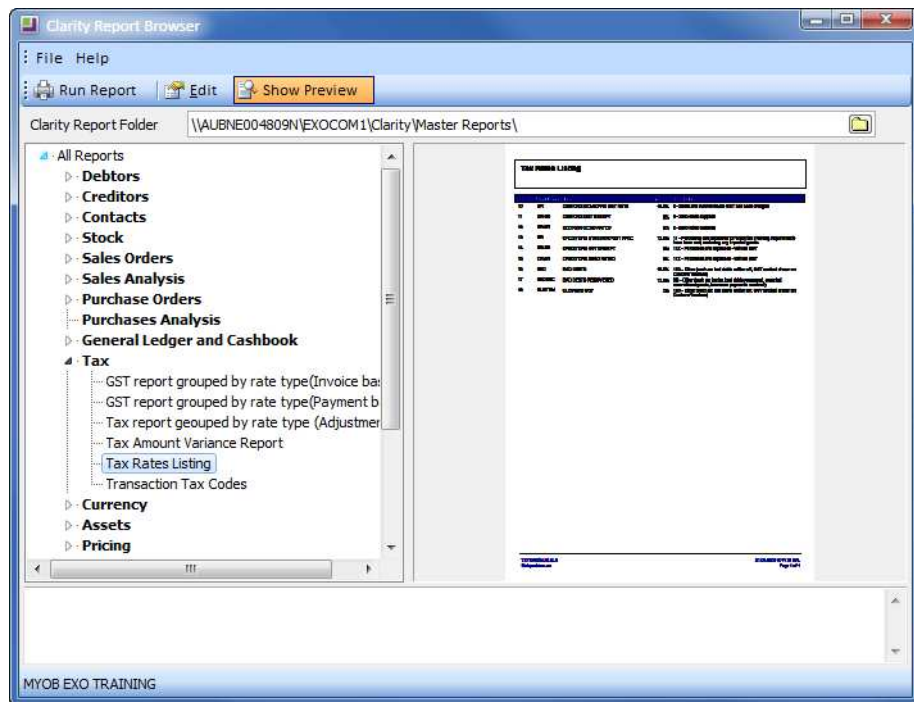
GL Report Designer

The **GL Report Designer** enables users to create or modify existing General Ledger reports such as P&L, Budget Analysis and Balance Sheet to suit their own requirements. Once reports have been designed or modified they can be run individually or run via a **GL Report Batch**. Modifying and running GL reports is covered in more detail in the General Ledger and End-of-Period Processes.

Run reports

Clarity reports are predominantly run from either the **Reports** menu or the **Clarity Report Browser**.

1 Open the **Clarity Report Browser** from the **Reports** menu.




Clarity Report Browser

2 Select the report and click on the **Run Report** button.

TIP



To view a preview of the report, click on the  **Show Preview** icon. This will display a pdf preview of the selected report.

- 3 Depending on the report you have chosen, certain parameters will need to be set. The following shows parameters for a stock sales report:

Report Parameters for Stock Sales Report

TIP









Select the **DESC.** option next to **Order By:** to sort the report in descending order.

NOTE

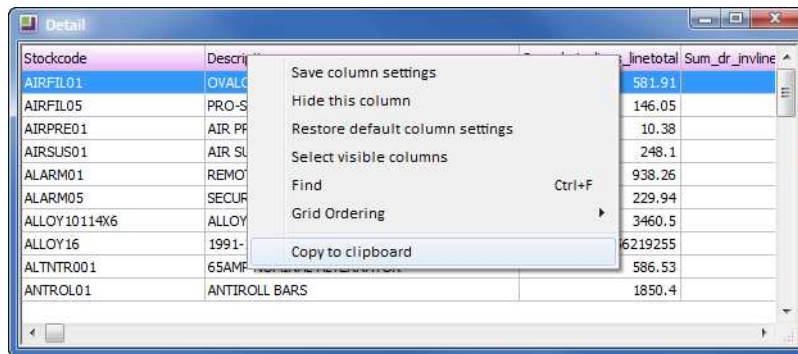


Many reports allow the use of Analysis Codes. If codes are recorded against source transactions and selected as a parameter in the report, then reports show only those transactions that the analysis code has been applied to. Up to two analysis codes can be chosen per report.

- 4 Once the report has been chosen and the appropriate parameters set, you can choose how you wish to view the information in the report. Click on the appropriate toolbar icon to:

	Print
	Preview on screen
	Export to a file for review
	View as a grid
	Email a pdf copy of the report
	Export

If you have selected **View as a Grid**, you can right click on the header of the ExoGrid and copy the report data to the clipboard for easy pasting into your spreadsheet or other document:



Copy to Clipboard function

Stock Sales						
From Period April 2011 To Period May 2011						
Transaction Date Range : All						
Stock Items : All						
Order By: Stockcode						
GST Excluded						
Currency converted at time of sale						
Primary Stock Group Range: All						
Secondary Stock Group Range: All						
Stockcode	Description	Quantity	Total Value	Discount %	Cost	Margin %
AIRFIL01	OVALCHROME AIR FILTER	9	581.91	0.00	449.89	132.02 22.69 %
AIRFIL05	PRO-STLYE AIR FILTER	5	146.05	0.00	92.70	53.35 36.53 %
AIRPRES01	AIR PRESSURE GAUGE	2	10.38	0.00	9.10	1.28 12.33 %
AIRBUS01	AIR SUSPENSION	1	248.10	0.00	184.55	63.55 25.61 %
ALARIM01	REMOTE CAR START SECURITY	10	938.28	0.00	725.62	212.64 22.66 %
ALARIM05	SECURITY ALARM	3	229.94	0.00	174.00	55.94 24.33 %
ALLOY1011408	ALLOY WHEELS STYLE 101 14X8 0	10	3,460.50	0.00	3,004.93	455.57 13.16 %
ALLOY16	1991-1993 STYLE GT PONY WHEEL	10	4,410.40	0.00	3,000.00	1,410.40 31.98 %
ALTRNTR001	65AMP NOMINAL ALTERNATOR	3	596.53	0.00	456.07	131.46 22.41 %
ANTR0L01	ANTIROLL BARS	6	1,680.40	0.00	1,387.92	482.48 24.99 %
BAT127HD	CHAMPION SILVER BATTERY - 127HD	13	966.65	0.00	593.00	372.65 38.99 %
BATCHAD1	BATTERY CHARGER	12	1,128.74	0.00	738.42	390.32 34.58 %
BATT12V31M	12V31M BATTERY	6	1,542.88	0.00	1,068.00	478.88 30.91 %
BRPAD4SET	BRAKE PADS SET - REAR - REPLACEMENT 94UP	1	88.75	0.00	72.07	16.68 18.79 %
BRPADSFRONT4SET	BRAKE PAD SET, REPLACEMENT, FRONT, 94UP	1	88.75	0.00	69.63	19.12 21.55 %
BRRTOR	REPLACEMENT FRONT AND REAR BRAKE ROTOR	5	968.75	0.00	277.55	388.20 38.21 %
CYLINDERH001	CAST IRON CYLINDER HEAD	1	1,350.00	0.00	1,022.20	337.80 24.84 %
DISBRA01	DISC BRAKE LUBRICATION	1	6.99	0.00	4.69	2.30 32.90 %
DUNLOP01	DUNLOP TYRES	4	251.44	0.00	209.52	41.92 16.67 %
DVDVCD000P01	ALPINE DIVA-S205 DVD/VCD/CD PLAYER	2	3,178.44	0.00	2,648.89	529.75 16.67 %
EQLSRAMP01	MOBILE 7 BAND AUDIO EQUALISER/AMPLIFIER	1	270.00	0.00	203.89	66.11 24.49 %
EXHSTFLOWMSTR01	FLOW MASTER 80 SERIES CROSSFLOW PERFORM	5	1,332.00	0.00	1,083.46	249.04 18.69 %
EXHSTMANFLD01	BUSCHUR RACING EXHAUST MANIFOLD	3	2,280.00	0.00	1,947.62	332.38 14.58 %
FREIGHT	FREIGHT	3	32.04	0.00	0.00	32.04 100.00 %
MOTOL01	MOTOR OIL	2	8.90	0.00	5.82	3.08 34.61 %
NKSRK4RK	NKX EXTENDED REACH SPARK PLUGS - 4 PACK	11	534.65	0.00	389.89	154.97 33.24 %
POLISH01	METAL POLISH - TUBE	1	4.00	0.00	2.50	1.50 40.45 %
SEACOV01	SEAT COVER VINYL - KNIT BACK	15	1,216.02	0.00	720.00	496.02 40.79 %
SEACOV05	SEAT COVER SHEEPSKIN	10	482.64	0.00	220.00	242.64 52.44 %
SEACOV10	STANDARD SEAT COVER	25	689.76	0.00	375.00	314.76 45.83 %
TRANFLUID01	GUNK TRANSEAL AUTO TRANSMISSION SEAL	1	11.20	0.00	19.24	-8.04 -71.79 %
WIPER01	STANDARD WINDSHIELD WIPER	5	51.00	0.00	47.50	4.30 8.30 %
WIPER02	TWINEDGE WIND SHIELD WIPER	5	43.00	0.00	39.95	3.85 8.79 %

Stock Sales Summary					
Grand Totals			192	\$28,727.47	\$21,240.42 \$7,487.05 26.06 %

MYOB EXO TRAINING Page 1 of 1
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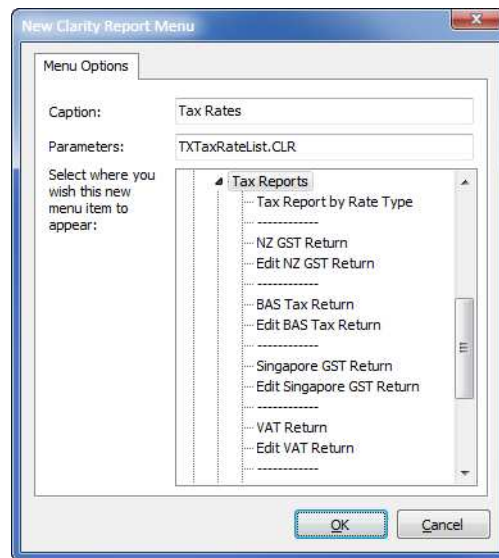
Sample Clarity Report: Stock Sales

Add Clarity Report to Reports Menu

Reports can be added to your reports drop down menu via the **Clarity Report Browser**:

- 1 Open the **Clarity Report Browser** from the **Reports** tab.
- 2 **Right-click** on the report you wish to add to your menu and select **add this report to MY Menu**.
- 3 Change the caption so that it reads the name of the report you wish to add (e.g. Tax Rate List)
- 4 A **REPORTID=** procedure can be specified. If this parameter exists the specified report will appear as the default selection.

- 5 Choose the menu location for the report.
- 6 Click **Ok**.

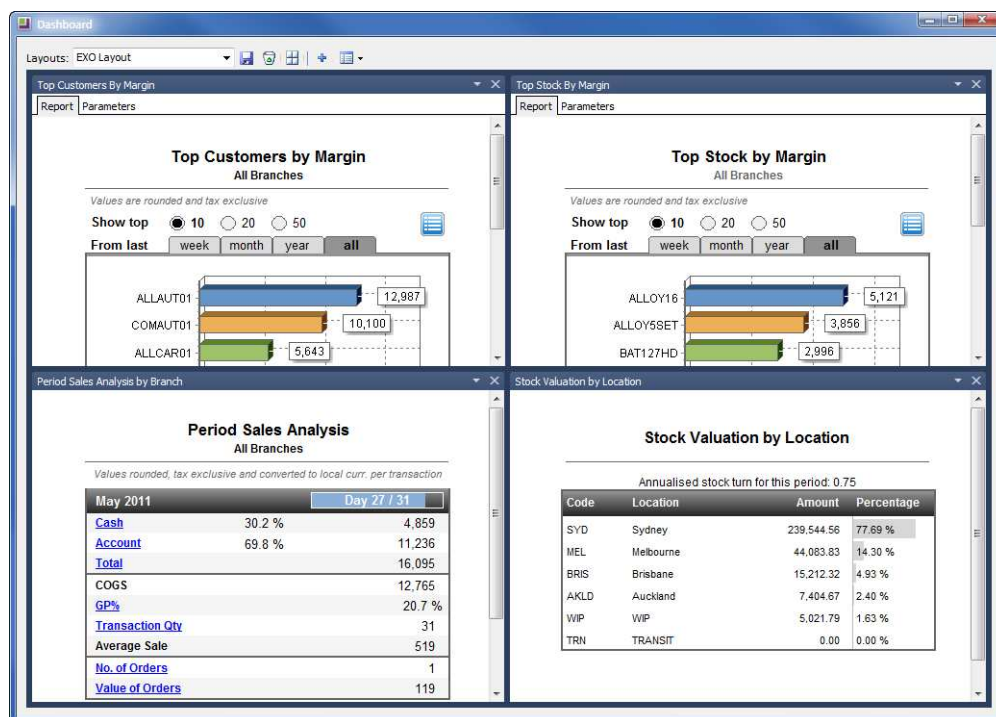


Add Clarity report to menu

Using Dashboards

The Dashboard is launched from the **Reports** tab.

The Dashboard enables individual users to set up their own series of dashboards using widgets created in EXO Analytics.



Sample Dashboard

TIP

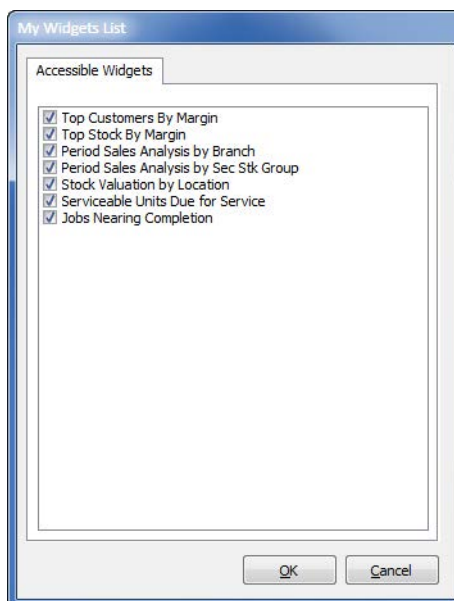


Clicking on summary data in the Dashboard drills down to source data. This provides even greater detail on specific items “at a glance”.



Create a Dashboard Layout

- 1 Launch the dashboard utility via **Reports > Launch Dashboard**.

- 2 Click on the  icon. You will be presented with a list of widgets available to you.



List of Widgets available to you

- 3 Select the widgets you wish to have available on your dashboard layout.
- 4 Click on **Ok**.
- 5 Click on the  icon to select the widget(s) to display on your dashboard.
- 6 Click the  icon in the toolbar to save your layout (e.g. Demo Layout).

TIP




A user can set up more than one Dashboard layout to be accessed as required. You could set up a "Sales" dashboard as well as a "Finance" dashboard to be opened and viewed separately.

Manipulate Widget Layout


Once a Dashboard layout has been created, you can change the way that you view the widget on the screen.

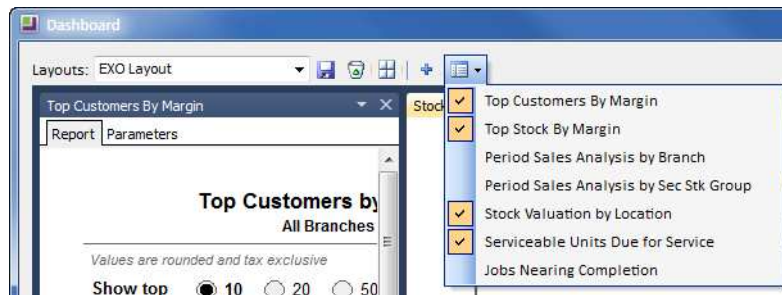
Resize a widget by clicking and dragging on the border of the report.

Move a widget to a new position by clicking and dragging on the blue report header.

Hover your mouse over the  icon to snap the widget to a specific position.

Click on the  icon to reset the widgets to the default layout.

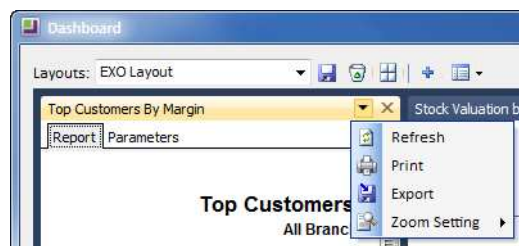
Remove widgets from the layout view by unselecting them from the list in the  icon as shown below (select again to bring back into view).



Dashboard view selection

Print or Export Widgets

The Dashboard is primarily designed to view reports on screen to provide an overview of key areas of responsibility for the individual user. At times it may be appropriate to print or export Dashboard reports. This can be done via the individual widget utility dropdown on the individual report as shown below.



Printing Dashboard reports

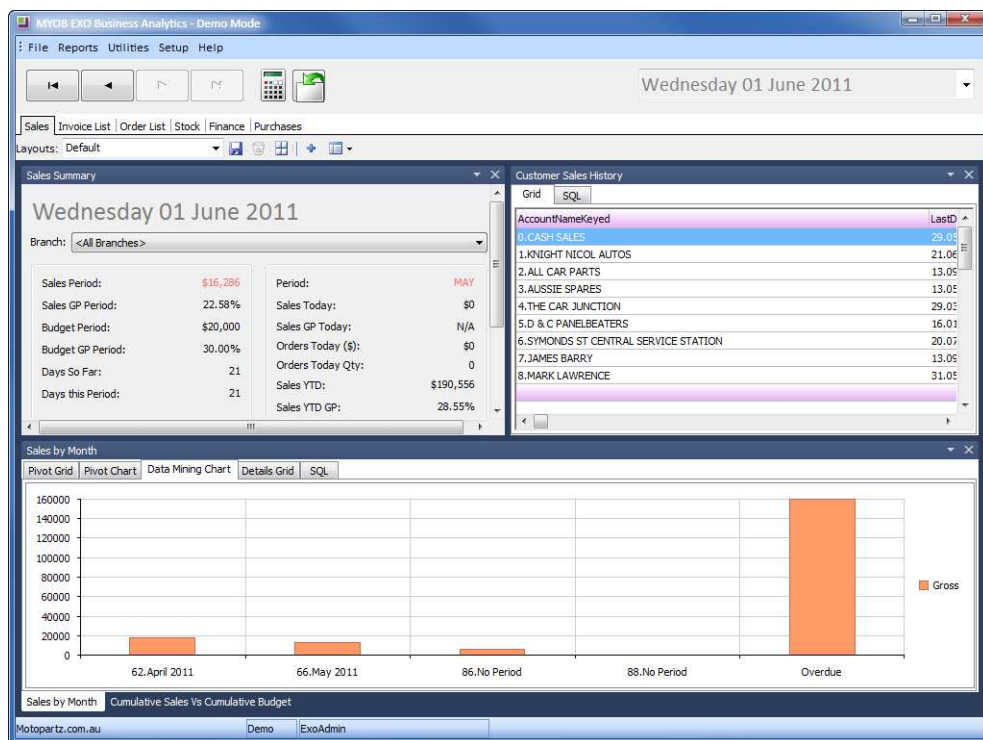
New widgets can be creating using EXO Analytics. Refer to *'Analytics'* on page 142 for more information.

Analytics

Analytics is launched from the **Reports** tab.

Analytics

EXO Business Analytics presents a customisable overview of the organization's business status and is intended for use by management to monitor business performance.



Sample Analytics screen

NOTE



For more information on using Analytics, including creating widgets, refer to the EXO Business Advanced Reporting training manual.

Skills checklist



Tick the skills that you have learned in this unit.

Skills	✓
Run reports using the Clarity Report Browser	
Add Clarity Reports to report menus	
Create a Dashboard Layout	

Getting Started - Review

4

This unit provides a list of questions to review what you have learned.

1 Name at least two ways in which Exo Business is different to other programs you have used?

2 What are the main account masters called?

3 Name three shortcut keys you are most likely to use?

4 What is the meaning of the different colours when listing debtor or creditor accounts?

5 How can columns be added to an Exogrid?

6 When resizing windows to suit your workspace, how can you save the new windows size and position?

7 Give two reasons why you might use History Notes rather than Notes when entering extra information about a supplier?

8 Where would you look for a quick overview of sales to a particular debtor?

9 How can tasks be exported to Outlook.

10 How will you quickly access your most commonly used reports?

11 Where would you look to see all available reports on the system?

Getting Started - Activities

1

This unit will provide you with a list of activities to practice the processes covered.

Activity 1 - Log in, search and manipulate exogrid

- Log into the Exonet training database using the User and Password of **DEMO**.
- Open a list of DEBTORS and sort by, PRIMARY GROUP and then by ACCOUNT NAME

Hint: Use Shift key to multiple sort.

- Maximise the screen to the full window size and save the Window size.
- Move the BALANCE column so that it appears next to the debtor name and resize the balance column so that is narrow.
- Save the column settings

HINT: Right click on Exogrid header.

- Exit the debtors screen and go back in. Are the changes you made to the column settings still visible?

Option 1a: Debtors>File>Advanced Search

- Search for all debtors with a current balance greater than \$5000.

HINT: go to FILE > ADVANCED SEARCH Market Parts

Option 1b:

Keeping your result from activity 1a, add an additional filter.:

- Search for all debtors from the Sydney area.

Hint: Use Address 3 not Address 4.

Activity 2: Search for transactional information

- Open the debtor account **JAMES BARRY**.
- What is the **BALANCE** owing on this account?

\$998.29

- What was the **TURNOVER** for the account this year?

\$0.00

- What **PRIMARY GROUP** is James Barry part of?

Retail

- What **INVOICES** make up the outstanding balance?

Inv # 098N

- Click on **GROUP BY PERIOD** to view transactions on a period basis. What transaction/s occurred in Oct 2008

HINT: If you cannot view the transactions remove the tick from the **SHOW ONLY UNALLOCATED** checkbox.

Option 2a:

- Print the **ACCOUNT DETAILS** for the James Barry account and review on screen. Note summary information provided.

Option 2b:

- Change the credit terms to **NET 7 DAYS** and the default payment type to **CHEQUE**. Assign a prompt payment discount of **5%** to the account.

Option 2c:

- Find the creditor account – **G GRAY ACCOUNTANTS**
- How much do Motopartz owe and on what invoice number?

HINT: Remember to search **CREDITORS** and not Debtors.

Inv # 2400 \$ 787.50

Activity 3: Add a new customer/debtor

You collected the following business card from a new Customer – **BOB JANE T-MART**. Enter this as a new debtor.



Primary Group	Retail
Base Price	Internet
Credit Terms	30th of the month with a \$20,000 limit
Currency:	AUD
Default email	accounts@bobjanetmart.com.au
Prompt Payment Discount	2%
ABN	333 654 111
GST Rate	1 - Auto Select Rate
Default Payment Type	Cheque

Activity 4: New contact

- Enter **JANE SMITHSON** as a new contact for **Bob-Jane T-Mart**.
- Make her the default contact.

Option 4a: Exporting contacts via clipboard

- Recall all contacts that have the marketing profile **RETAIL CLIENTS**
- Export to an Excel/Word file

HINT: right click on the retrieved information and select "COPY TO CLIPBOARD".

Activity 5: Change default contact

- Currently **TERRI ECHURT** is set as the default contact for the customer **AUSSIE SPARES**. You have been advised that she has left Aussie Spares and the new main contact will be **ALLAN BALLOT**.
- Assign Allan Ballot as the default contact.
- Remove Terri's association from Aussie Spares.

HINT: Do not delete this contact, simply use the minus icon to unassociate from Aussie Spares.

Activity 6: History notes

- Enter a **HISTORY NOTE** to Terri Echurt's account contact indicating that she is no longer with Aussie Spares: ***"Terri Echurt is no longer with Aussie Spares. All future enquiries should go to the new default contact – Allan Ballot"***
 - How will you Email the history note to your own email address?
-

Activity 7: Create task & export to Outlook

- You have called Allan to congratulate him, and been invited to a celebratory lunch with the directors of Aussie Spares. Create a new task with the details:
- 16th of next month. 12.00 until 3.00pm at the Bathers Pavilion.

HINT: search and enter the company name if you want the task to appear under the Aussie Spares task tab as well as Allan Ballot task tab.

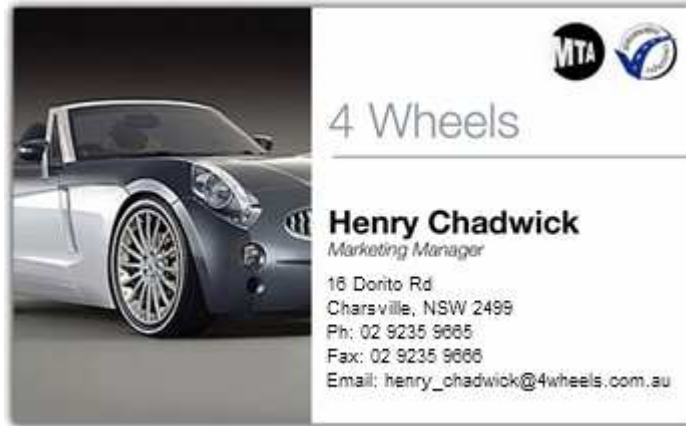
- How will you Export the task to Outlook?
-

Option 7a: Recurring Task

- Establish a new recurring task for a regular Sales meeting on the 1st Tuesday of each month until the end of the year. Time frame is 8.30 – 9.30am.

Activity 8: Non-accounts

- Create a new non-account for the company **4 WHEELS**, a prospective customer.



- Create and link a primary contact **HENRY CHADWICK**
- Put him into a new marketing class of **9: PROSPECTIVE CLIENTS**.

HINT: you will need to set up a new marketing class via the marketing tab of the contact.

Option 8a: Convert non-account

- Convert 4 Wheels to a debtor and assign the following fields.

Primary Group	Retail
Base Price	Retail
Credit Terms	Cash Only
GST Rate	1 - Auto Select Rate
ABN	778 655 456
Default payment type	Cheque
Prompt Payment discount	5%
Popup Alert	New Customer - please make sure they get good service!

Activity 9: New Creditor

- Obtain a business card from the person sitting next to you. Enter them as a new supplier to Motopartz and assign the following fields.

Primary Group	Australia Wide
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Secondary Group	Overhead
Credit Terms	Net 21 days
Currency	AUD
Email	sales@xxxx.com
Default Code	3550 Rent & Rates
Default Payment Type	Cheque
Default invoice mode	GL
Primary Lead Time	4
Secondary Lead Time	1
ABN	67 543 123
Override GST Rate	1 - Auto Select Rate

Option 9a: Enter default contact

- Enter the person next to you as a default contact for the new supplier account.

Activity 10: Reports

- Generate a preview of the report that shows the outstanding balances for all debtor accounts sorted by the outstanding balance. Which local currency customer owes the most and how much do they owe?

Debtor Aged Balances Report. Market Parts: \$26,445.93

- Find the report DEBTORS STOP CREDIT LIST and add it to your main reports menu
Hint: Use Clarity Report Browser and right click on the report.
- Preview the report.

Activity 11: Create a personal Dashboard

- Create a new Dashboard layout called MY DASHBOARD.
- Incorporate the following reports (widgets) into the Dashboard:
 - Top Stock by Margin
 - Top Customer by Margin
 - Period Sales Analysis by Branch

- Review the available reports and select a fourth report to include in your Dashboard
- Reorganise the dashboard so that your personal choice report is in the upper left of the screen.
- Resize the widgets in the dashboard so that they are set to “Dashboard width”
- Save the new dashboard layout.