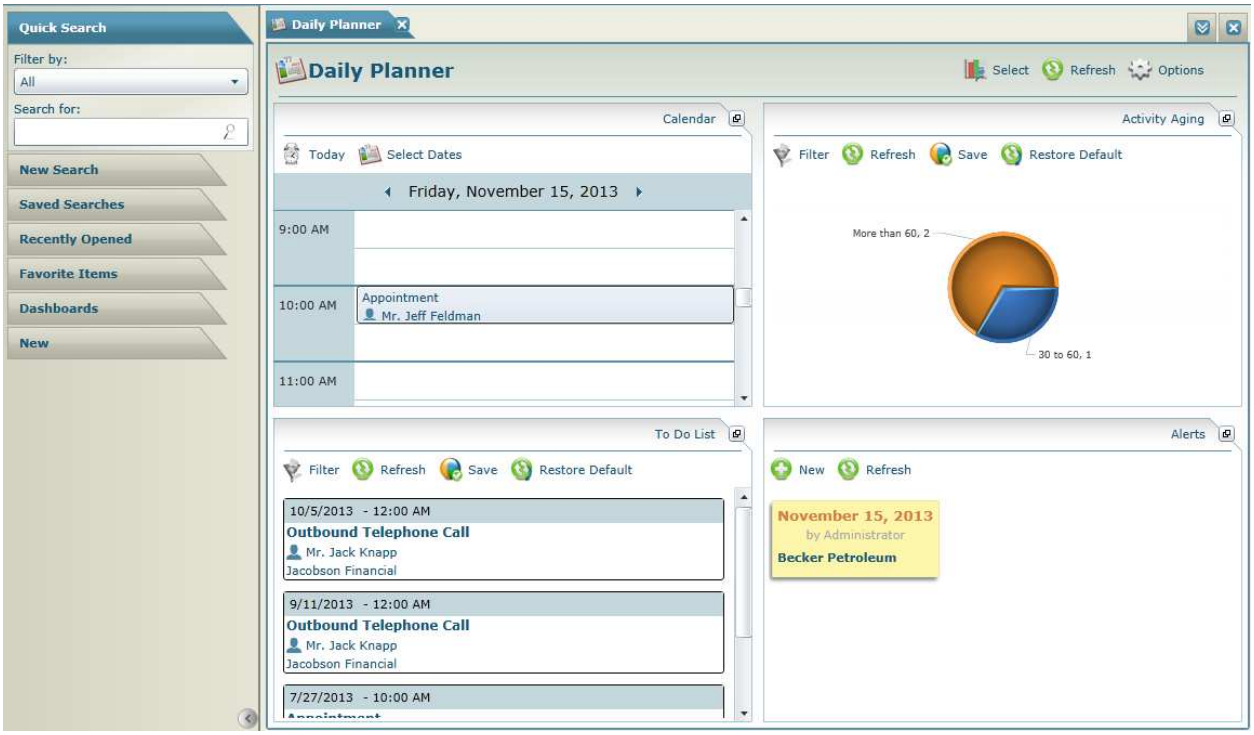
Daily Planner

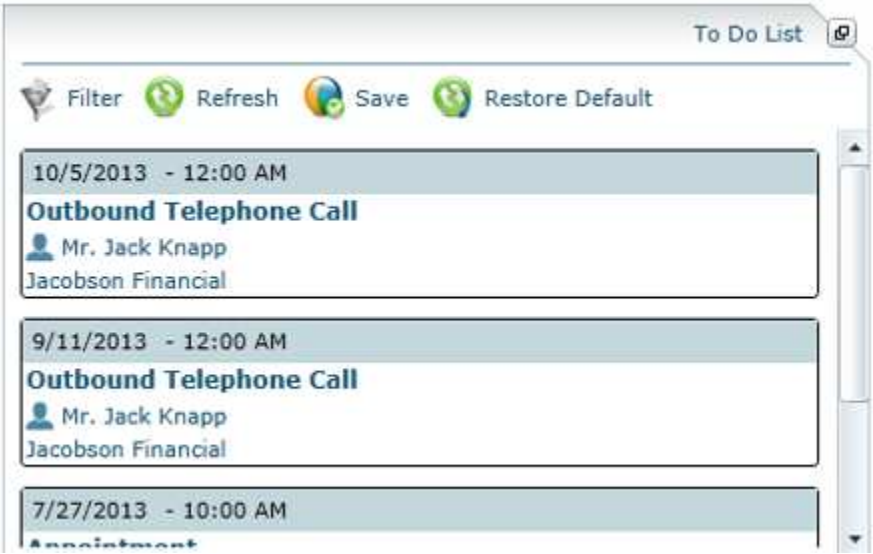
At the top of the application is the Workspace menu. Click WorkSpace to open the Daily Planner. This default page provides a snapshot of important data according to the User's role. It may be defined by user or group

The screen is divided into four sections. You can move the panels, resize or filter them any way you like.



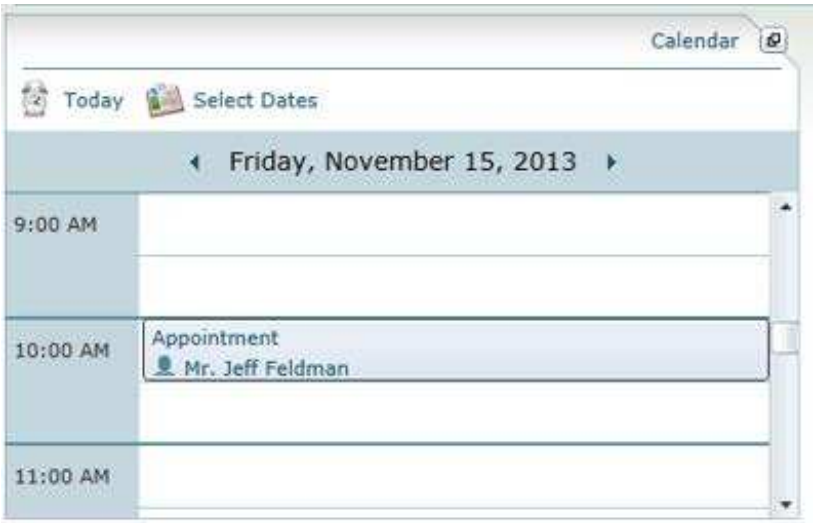
To Do List

The first one is the To-Do List. It shows all the open activities that have been assigned to you that should be completed today. Click any activity to open it and maintain it. As you enter results for the activities, they will become 'closed' and will be removed from your workspace. The goal is to have an 'empty' To Do list by the end of the day each day.



Calendar

The Calendar shows Scheduled meetings and other events with specific start and end times. These are typically meetings or scheduled calls that should be done at a specific time during the day, and they appear BOTH on your calendar, and in your To Do List. Activities without these attributes, can be completed at any time during the day, are simply listed in your ToDo list (such as sending an email). These Calendar activities can be synchronized with your Outlook calendar.



Alerts

You can use Alerts to notify yourself and other users about important information.

Activity Aging

And this graph displays your open activities by date…this way you can keep track of anything that has been left outstanding for a long period of time.

Note: Tooltips show additional information about an item in a pop-up window. This feature is available from many places where a company name, contact name, or activity description is displayed. Hover over an activity description in the calendar to display additional information.

Note: Hyperlinks provide a convenient way to open an item. This feature is also available from places where a company name, contact name, or activity description is displayed. Click on underlined text in the calendar to open the item.

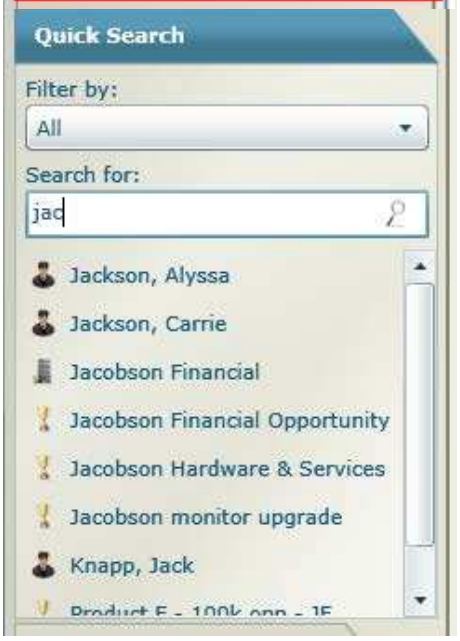
Navigation Menu

Each Workspace screen contains a navigation menu on the left-hand side. This accordion style menu contains features pertaining to the selected workspace. Common features include Search, Recent Items, Favorites, and New.

Note: Click on a section of the menu to expand, and reveal related options.

Quick Search

Locate records quickly by using Quick Search. Just type some or all of the name you're looking for, and press enter. You can also type part of the name and use the * symbol as a wild card. Click any of the search results to open them in a new tab.



By default, Quick search is set to look at all types of records. If you like, you can change it to search for only Company, Contact, Opportunity or Incident records.

Example: This example shows an entry of "jac" in the Search For column. With Filter By set to "All", all items that start with "jac" are retrieved.

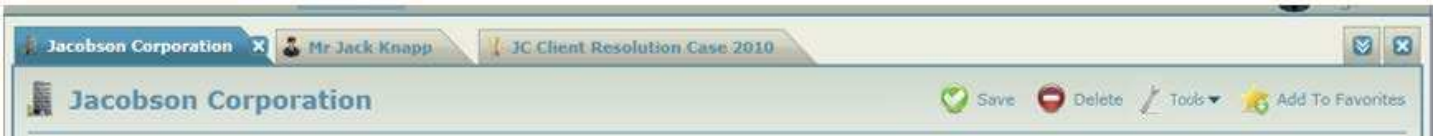
Note: In the list of search results, a tooltip displays more information about the highlighted item when the mouse cursor is placed over the "i" (information) image.

Setup Options: Click the down arrow to the right of the 'Filter By' field to add or remove items from the filtering list.

Workspace Tabs

Workspace items, such as contacts and companies, are opened in pages in the middle section of the application. In this area items may be browsed, viewed, and edited.

You can open any number of tabs. A tab menu is available to the right to help navigate through open pages. A tab is closed by pressing the "x" (Close) image on the tab header.



Workspace Pages

Pages that open in tabs come in a variety of types:

- **List Pages**, used for browsing data
- **Dashboard** pages provide graphical views of data
- **Edit Pages**, used to view and maintain data. When you select an item from search results it opens in an Edit page. Edit pages have a common format. They are used to view details about an item, modify data, and perform operations that are particular to the item's type.

  Example: The Company is an example of an Edit page. From this page you can view details such as company contacts and activity history, enter notes, schedule appointments, and so on.

Contact Trees

Edit pages may have a Contact tree. Contact trees relate any number of contacts to an item, such as a company.

Note: In the list of contacts, a tooltip displays more information about the highlighted contact you hover over the Contact's icon.

Note: To add a new contact to the company, press the New Contact button in the toolbar above the Contact tree. To relate an existing contact to the company, press the Link Contact button. Contacts may be related to any number of companies.

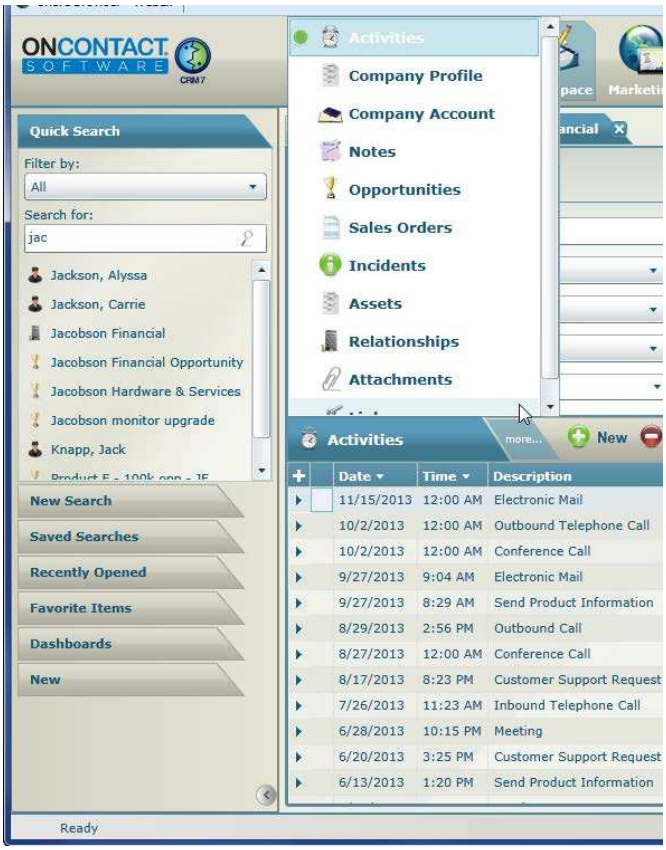
Note: The Tools menu on the Contact tree performs common tasks with the selected contact, like creating an activity or sending an email. Select your contact, and click the Gear icon on the right to display your options.

Tab Control

Edit pages commonly have a Tab control in the center of the page. The Tab control contains several pages of data related to the item.

For example, the Tab control on the Company page contains activity history, the company profile, accounting information, notes, and more.

Click 'More' to view options available, and click any option to display its page.



Note: Data displayed in Tab controls often provide hyperlinks to underlying details. For example, on the Activity tab page, click on the description to open the activity.

Detail Columns

Detail columns are those which may have more than one value (row). For example, a company may have more than one address. Click in the field to display additional rows.

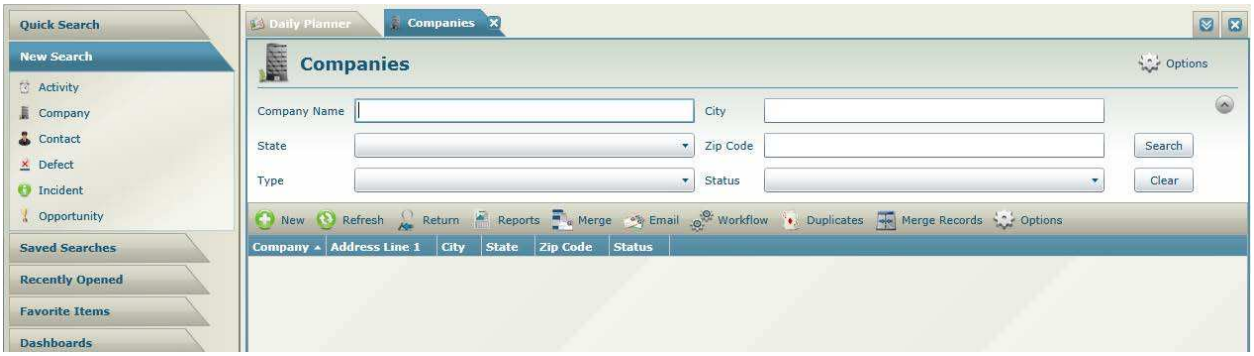
To edit a row, hover over it and Click on the Edit button.

Press the "+" (New) button to add a new one.

Note: To remove a row from a detail column, press the "-" (Remove) button on the highlighted row.

New Search

Create your own customized search by clicking New Search. Choose the type of records you want to search for, and click to open the search criteria screen. Enter the data you'd like to search for and click Search to display the results.



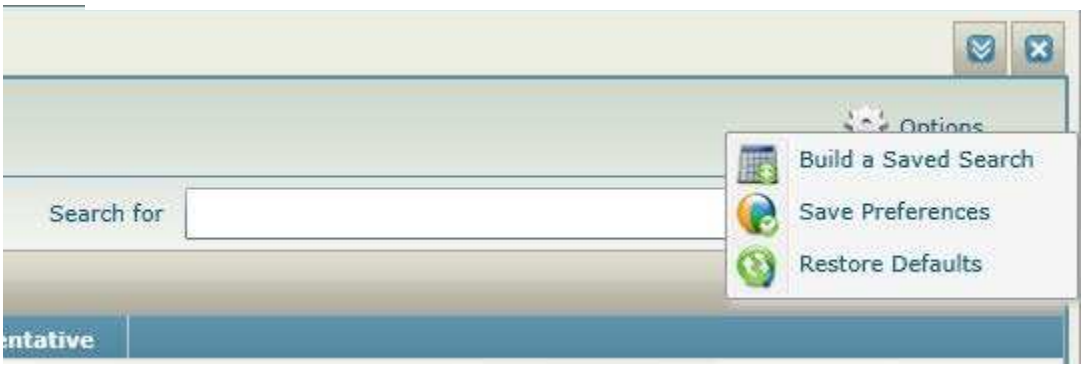
Saved Searches

The Saved Searches section of the Navigation menu contains options for creating, saving, and running searches. Results for searches are displayed in List pages. These pages display results in a browsable format; and provide options for filtering, sorting, grouping, and performing operations on rows returned.

Example: Expand the Saved Searches menu section to revel options. Searches are grouped by type. Expand the Contact group and click on My Contacts to open a list page and view results. This search selects all Contacts assigned to the current user.

Note: Click on a Contact name in the list of results to open it.

Note: You can create and save your own Searches by clicking Options and selecting Build a Saved Search.



Recently Opened Items

The Recent section of the Navigation menu displays the last 20 items you have opened by default. This provides a quick and convenient way to reopen an item recently accessed.

Setup Options: The number of items displayed in the Recently Opened Items section is configurable.

Favorite Items

Similar to Recently Opened, the Favorite Items section of the Navigation menu displays a list of items you have 'bookmarked' because you need to use them often. Placing them in the Favorites list eliminates the need to search for them.

Click the Add to Favorites button on any Edit page (i.e. Company or Contact) to add them to the list.

Note: To remove a row from Favorites, press the "–" (Remove) button on the highlighted row.

New

The New section of the Navigation menu contains options to create items that are frequently added, such as companies, contacts, and activities. New pages contain only the most commonly used and required columns so that data entry is quick and simple.

Setup Options: Duplicate checking is performed when adding company and contact records. If possible duplicates are found, a prompt is displayed to confirm creation of the new item.

Note: When adding a company or contact, an entry in the zip code column automatically populates city, state, and country.

Add New Items from Edit Pages

It's easiest to add related items directly from main Edit pages.

Example: Suppose that you want to add a new Contact to a Company. First, open the Company record. Then click the new button above the Contacts area. The new Contact record will automatically be populated with the Company data, saving you time.
Activities added from various pages are similarly related to items. They may be added from the Contact, Company, Opportunity, and Incident pages.

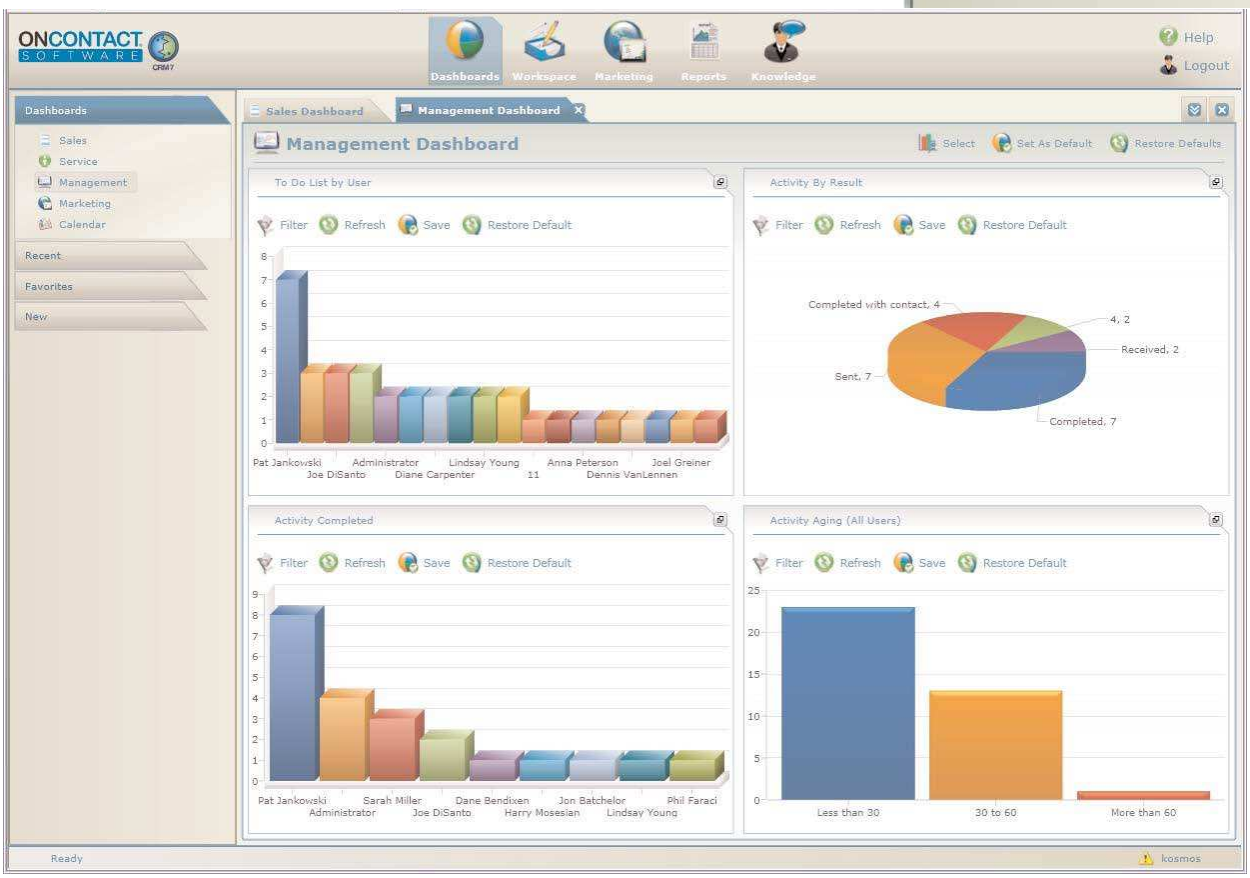
Activities may also be added from Contact trees on these pages. Select the Contact's row to display the Options icon (gear). Choose New Activity to create a new activity related to the company and the selected contact.

Dashboard Workspace

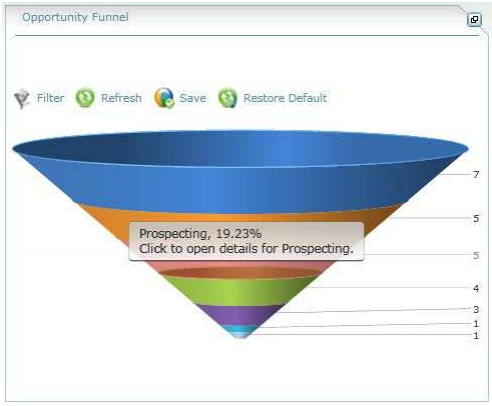
Dashboard pages provide analytical views of application data. A dashboard is made up of a series of panels. Panels consolidate data and present results in visual controls that are easy to understand; such as charts, gauges, and lists. Panels may be changed, sized, and rearranged according to personal preference.

Available dashboards are listed in the Dashboard section of the Navigation menu.

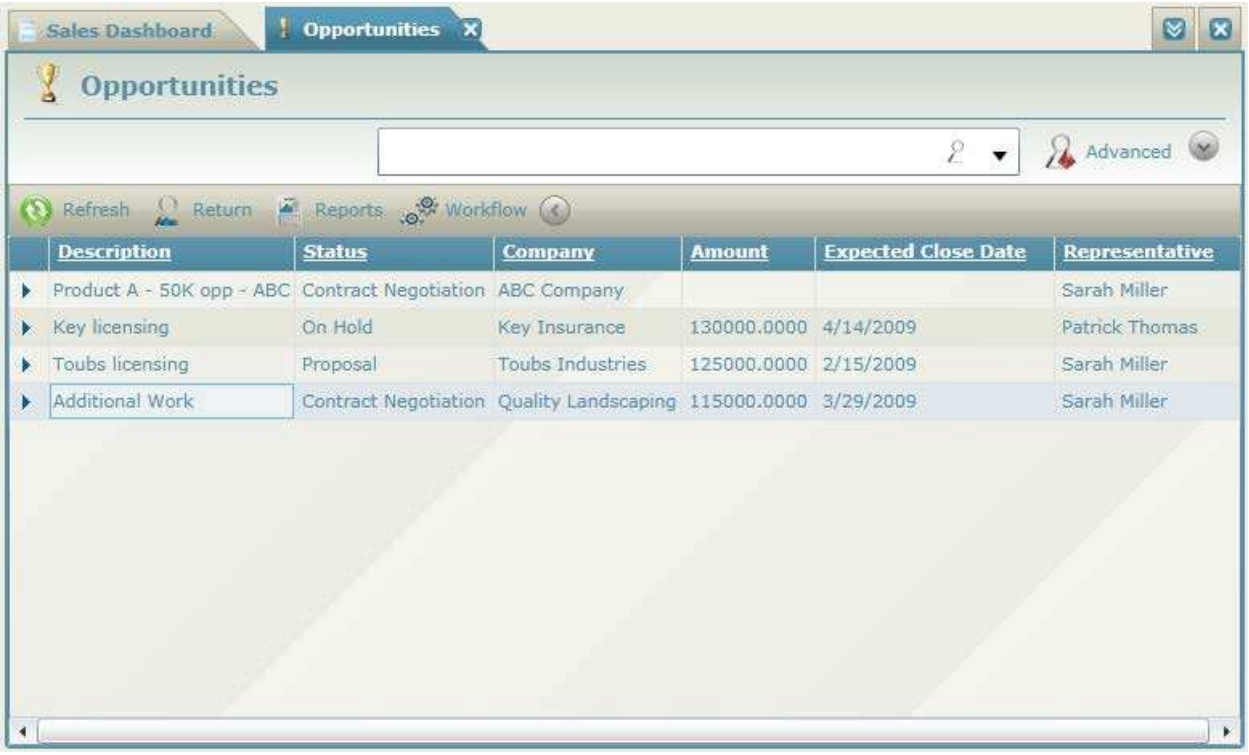
Click on a dashboard name in the menu to open it.



Note: Hover over a section of a graph to view details.



Note: Click on a section of a graph to open a List page with these items retrieved.

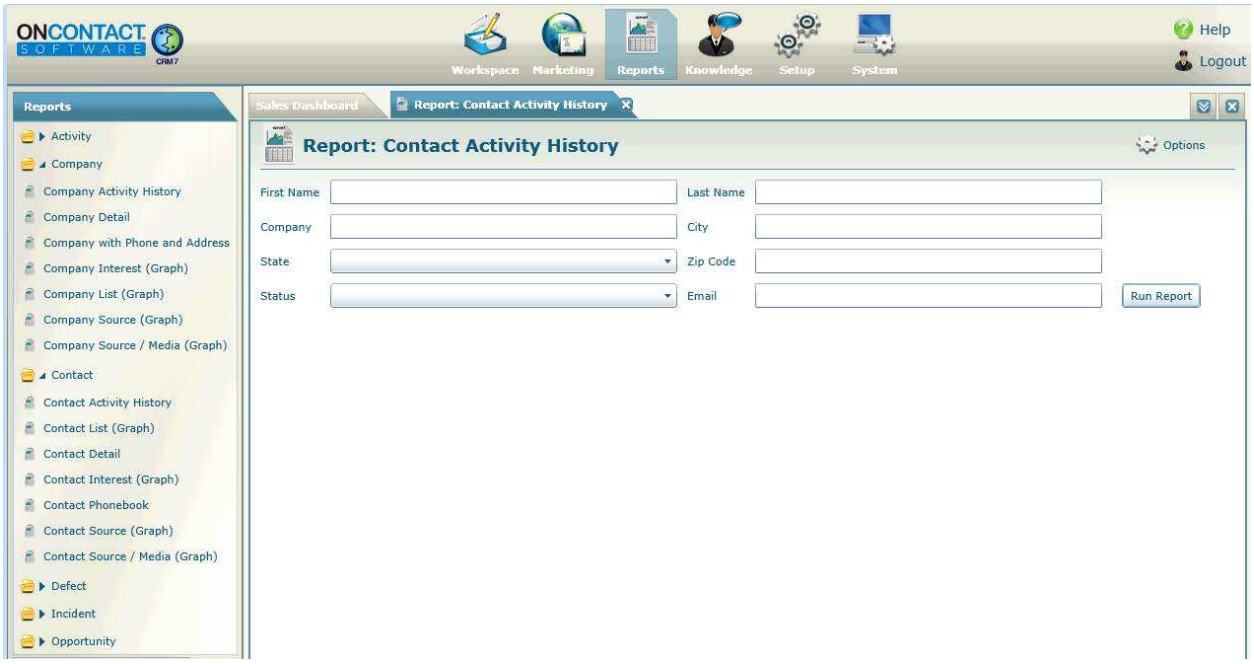


Description	Status	Company	Amount	Expected Close Date	Representative
Product A - 50K opp - ABC	Contract Negotiation	ABC Company			Sarah Miller
Key licensing	On Hold	Key Insurance	130000.0000	4/14/2009	Patrick Thomas
Toubs licensing	Proposal	Toubs Industries	125000.0000	2/15/2009	Sarah Miller
Additional Work	Contract Negotiation	Quality Landscaping	115000.0000	3/29/2009	Sarah Miller

Report Workspace

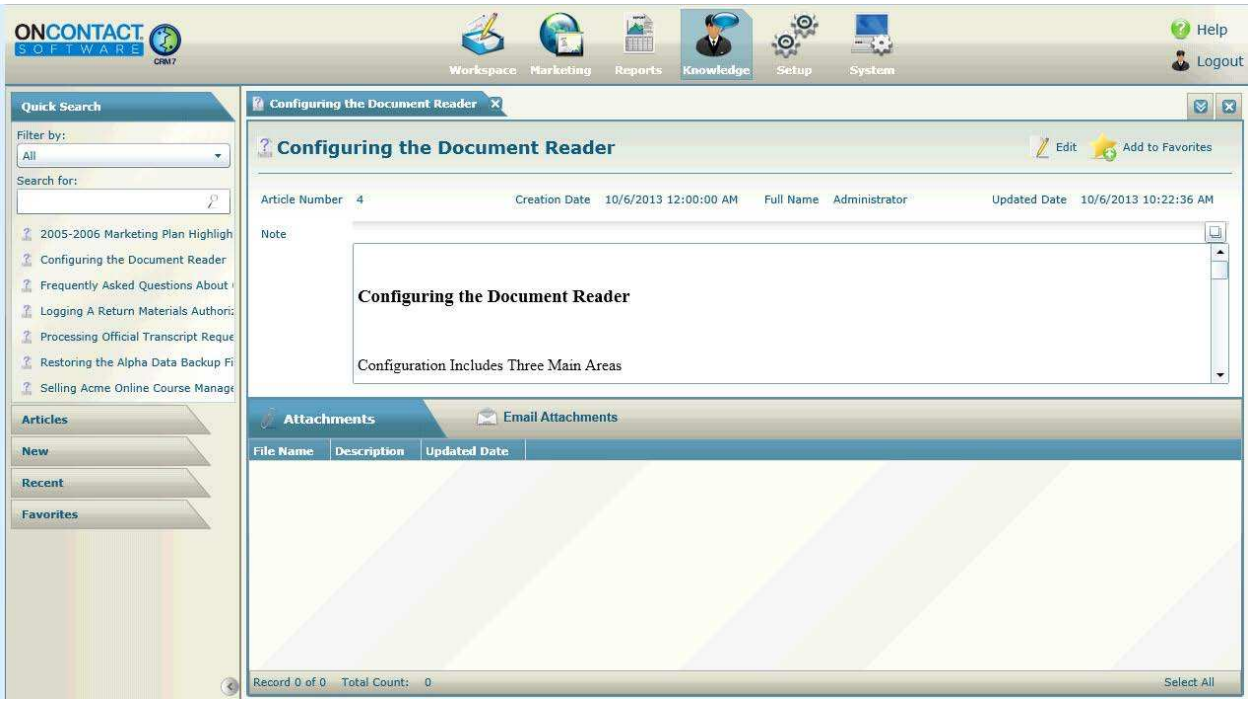
Similar to dashboards, reports provide analytical views of application data. Reports are formatted for printing and include more criteria options for filtering data prior to running.

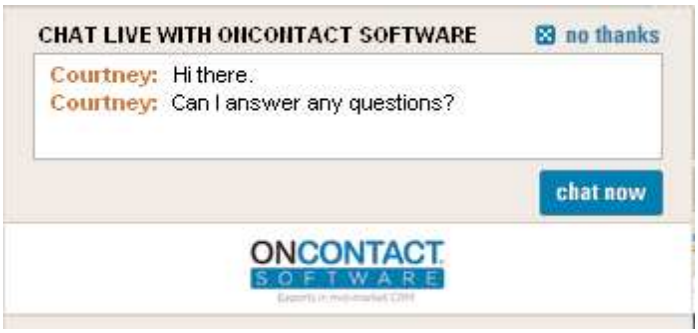
Available reports are listed in the Report section of the Navigation menu and are grouped by type. When a report is selected from this menu, a Criteria page is opened. Enter values to filter data sent to the report before pressing the Run button.



Knowledge Base Workspace

The Knowledge Base workspace is a library for company documents. Examples of the type of documents stored here include product literature, price lists, and faq's. Use the Search section of the Navigation menu to locate articles by number, name, or text contained within them. The Articles section contains a list that is grouped by type.



Free Online Chat Support

OnContact Software offers free online support. Click on the Help button to contact a representative.