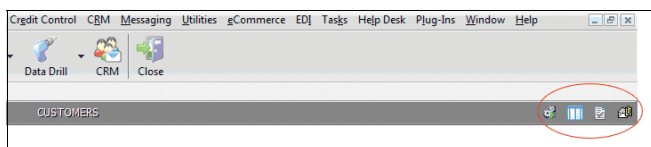



Tips, hints & short-cut keys contd!

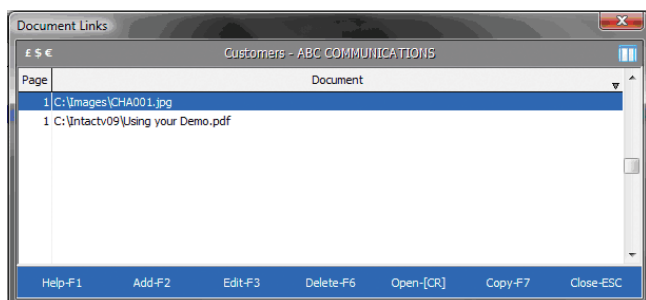
Make more efficient use of Intact with these handy tips and tricks.

The following screenshot shows you were to find the icons mentioned in both Tip 12 and 13.




Tip 12

The  icon in Intact allows you to **link to external documents** such as Word, Excel, Cad Drawings etc. For example, a detailed Excel costings can be attached to a summary quotation and is readily available for viewing.



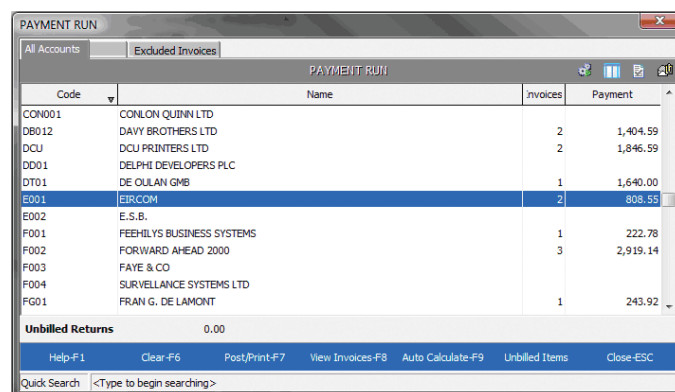
Tip 13

The 'Configure List'  (see above screenshot for icon location) has a number of useful facilities. One of these facilities is the **export option**. It will export the contents of any window on which this icon is displayed, to Excel i.e. transactions (a full daybook or an individual ledger's transactions), customer or supplier lists etc.



Tip 14


Automatic Payments Procedure - In the 'Purchases Daybook', 'Payment Tab' click on the 'Payment Run' button "R". The payment run screen appears. To calculate the payments due you press the F9 'Auto Calculate' button and enter the date you want to include invoices from. The system then calculates the payment due to each supplier. Once amount due is calculated you can view the invoices (F8) and change the payment amount or enter any discounts taken. Once you are happy with the amounts you simply press the F7 Post/Print button and the payments get posted to the supplier accounts and allocated to the invoices.



Tip 15

Intact has a facility which allows you to put invoices on 'Credit Hold' or generate a 'Credit Request'. If the parameter in Config 3, "Link held purchase invoices to credit requests?" is set to YES, an invoice 'On-Hold' that also has a 'Credit Request' attached to it, cannot be taken off 'hold' until the credit request is first processed.

To put an invoice on 'Credit Hold', highlight the invoice in the day book screen and click on the 'Stat/Note' button or Press "U". Once an invoice is on hold it appears in red in the day book and also the supplier ledger. On hold invoices will not be included in the 'Automatic Payment Run'.



Status Change

Status (H-Held)

Create Credit Request?

Date

Reason/Type Choose Reason from drop-down menu.

Notes

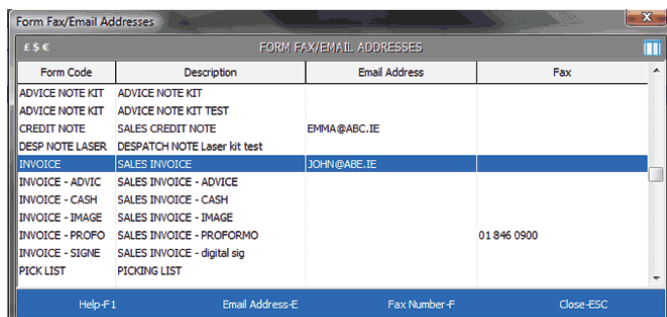
Disputed Amount Accept or overwrite!

When Saved, the invoice will be highlighted in red & have H in its status column

Tip 16

Form Fax/Email Assignment Screen - If you are using the standard Intact solution, in the customer contacts tab you can only record one email address and one fax number.

With the new feature available under the F8 Ledger option on a customer, option 'S' allows you to record additional email addresses and fax numbers for specific Intact forms to be sent to.



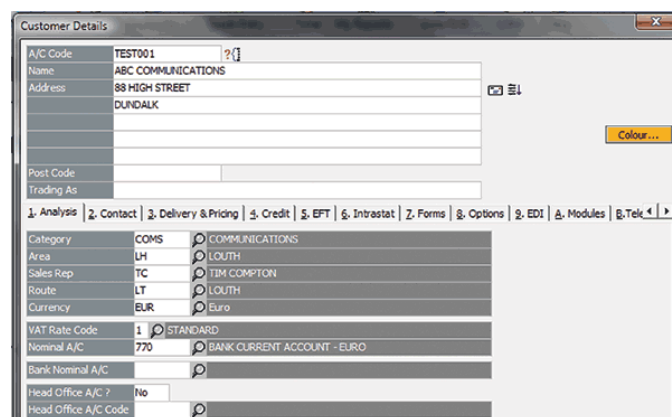
Form Fax/Email Assignment

Form Code	Description	Email Address	Fax
ADVICE NOTE KIT	ADVICE NOTE KIT		
ADVICE NOTE KIT	ADVICE NOTE KIT TEST		
CREDIT NOTE	SALES CREDIT NOTE	EMMA@ABC.IE	
DESP NOTE LASER	DESPATCH NOTE Laser kit test		
INVOICE	SALES INVOICE	JOHN@ABC.IE	
INVOICE - ADVIC	SALES INVOICE - ADVICE		
INVOICE - CASH	SALES INVOICE - CASH		
INVOICE - IMAGE	SALES INVOICE - IMAGE		
INVOICE - PROFO	SALES INVOICE - PROFORMO		01 846 0900
INVOICE - SIGNE	SALES INVOICE - digital sig		
PICK LIST	PICKING LIST		

Help-F1 Email Address-E Fax Number-F Close-ESC

Tip 17

Colour Change - If you would like to highlight specific customers to show, for example, different regions, reps or category of customer why not try the standard feature within Intact to change the colour of a customer on the screen.



Customer Details

A/C Code

Name

Address

Post Code

Trading As

1. Analysis | 2. Contact | 3. Delivery & Pricing | 4. Credit | 5. EFT | 6. Intrastat | 7. Forms | 8. Options | 9. EDI | 10. Modules | 11. Tele... |

Category

Area

Sales Rep

Route

Currency

VAT Rate Code

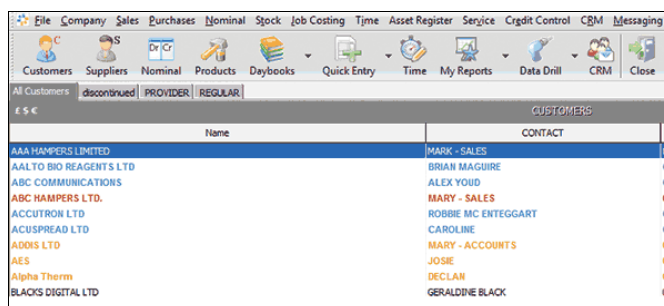
Nominal A/C

Bank Nominal A/C

Head Office A/C?

Head Office A/C Code

To change colour, click on the gold 'colour' button as shown in above screenshot. Colour change example below.



File Company Sales Purchases Nominal Stock Job Costing Time Asset Register Service Credit Control CRM Messaging

Customers Suppliers Nominal Products Daybooks Quick Entry Time My Reports Data Drill CRM Close

All Customers discontinued PROVIDER REGULAR

Name	CONTACT
AAA HAMBERS LIMITED	MARK - SALES
AALTO BIO REAGENTS LTD	BRIAN MAGUIRE
ABC COMMUNICATIONS	ALEX YUOD
ABC HAMBERS LTD.	MARY - SALES
ACCUTRON LTD	ROBBIE MC ENTTEGGART
ACUSPREAD LTD	CAROLINE
ADDIS LTD	MARY - ACCOUNTS
AES	JOSIE
Alpha Therm	DECLAN
BLACKS DIGITAL LTD	GERALDINE BLACK

