

SmartCompany 3.1 Online Help

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Welcome to SmartCompany

SmartCompany is the sales management application for medium-sized companies who want enterprise-level integration of information about customers, orders, inventory, accounting, tasks, and events.

SmartCompany combines sales automation with project management, order tracking, accounting, product catalogs, and extensive reporting and security capabilities. When used as your company's account information portal by all account-related staff, SmartCompany will keep everybody on the same page about sales, upcoming events, current and prospective customers, business opportunities, orders on hand, and other important aspects of your business that relate to customers.

Think of SmartCompany as an *information manager* that links records about clients, prospects, products, suppliers, resources and events, to provide a seamlessly integrated environment that you and your colleagues can use to plan and monitor all aspects of doing business: contact management, order tracking, anticipated revenues, sales report generation, and the other activities that keep your company profitable. Because everybody has access to the same real-time information, gaps and redundancies in customer and order management are drastically reduced, and your company's human resources are optimized to the max.

Because it's Web-based, SmartCompany runs in a browser and works like other Web applications. Because it's modular, each element of SmartCompany (the Accounts module, the Reports module, the Contacts module, and so on) is easy to find and use. Your company will have some or all of the eight available SmartCompany modules depending on the subscription you purchased. (See below for details.)



Click a tab to go to a module: Home, Accounts, Contacts, etc.

How SmartCompany Can Help

How can SmartCompany help you in the real world? It can provide nearly instant answers to questions like:

- Who are my best customers?
- What are they buying? How much?
- Who are my leading sales reps?
- How are my sales reps doing against quota?
- How profitable is my business?
- ... and many more

Whether you're a SmartCompany administrator (responsible for database configuration and user permissions) or just an everyday user, you'll find SmartCompany fun and easy to navigate. Even better, SmartCompany will greatly simplify the day-to-day tasks that involve keeping in touch with customers and ensuring their needs are met.

A Version of SmartCompany for Each Stage of Your Company's Growth

As you progress from a one-person start-up to a full-fledged company, SmartCompany will grow right alongside you. Through its "edition" approach, SmartCompany enables you to subscribe at a lower price and receive the only the functions you need at early stages of growth. As your company's size and needs expand, you can upgrade your subscription to include a larger number of users, and graduate to a more comprehensive edition of the program, with more features and modules.

The table below describes the features of SmartCompany's three editions: Solo, Sales and Corporate.

	SmartCompany Solo Edition	SmartCompany Sales Edition	SmartCompany Corporate Edition
Description	Free yourself from the shackles of desktop contact managers and save money. Convert your data in minutes. Take advantage of this risk-free introduction to the power of on-demand software.	Step up to the most powerful and affordable team selling tool in the business. Shorten sales cycles and close more business.	Gain insight into your entire business, from prospects to profits and more.
Benefits	Connect anytime, anywhere Automate repetitive tasks Keep focused and informed See customer info on demand	Unlimited users Know your hot prospects Customize your sales process Share current, centralized data Track deals in the pipeline Click for real-time forecasts	Unlimited users Know your best customers Customize order management Share documents and templates Track orders and revenues Track payments and commissions
Modules included	Contact manager Calendar and to-do list Activity history	Contact manager Calendar and to-do list Activity history Sales pipeline management Aging of prospects and deals Pipeline reports and forecasts	Contact manager Calendar and to-do list Activity history Sales pipeline management Aging of prospects & deals Pipeline reports & forecasts Booked order management

			Project management Payments and commissions Product price book Shared document library Revenue and profitability reports
Subscription fees	FREE (one user)	\$19.95/month/user	\$39.95/month/user
More information	Learn more	Learn more	Learn more

Getting Up and Running with SmartCompany

SmartCompany is easy to use and filled with time-saving features that will become essential to everyone in your organization.

To get an idea of how SmartCompany is organized, go to [Basic Concepts](#). Read through that section and work with your organization's SmartCompany administrator to begin some basic tasks. In no time you will feel right at home using SmartCompany.

Obtaining Technical Support

Online and telephone support is available for all SmartCompany customers. [Click here](#) to learn more about the available technical support options.

Getting Started

Basic Concepts

SmartCompany is a Web-based application that helps your company track essential business data. It includes modules for:

- **Time and task management** - keeping track of your calendar and to-do list, along with group calendaring and task delegation
- **Account and contact management** - keeping in touch with the companies and people with whom you do business
- **Opportunity management** - defining and tracking your very own sales process from first contact to closing
- **Order management** - tracking realized revenue after the sale, as well as commissions, chargebacks, and customer service issues
- **Project management** - the ability to group related opportunities and orders together to facilitate complex sales and team selling
- **Printing, reporting, and data management** - features for loading data into SmartCompany, running reports on existing data, and exporting data for use in other programs such as Microsoft Excel
- **System Administration** - customizing the SmartCompany interface for your needs, managing user accounts, and controlling user access to sensitive data

✔ Depending on your SmartCompany subscription, your company may use all or some of the above-mentioned modules. Click [here](#) to go to a description of SmartCompany's three "editions" - their features and pricing.

The SmartCompany application, along with your database, is hosted in a secure, high-speed data center. There is no software to install on your machine - you use SmartCompany from within your Web browser simply by logging in to the SmartCompany Web site using the name and password provided to you by your SmartCompany administrator. You can use SmartCompany from any location that has an Internet connection and a Web browser.

Organizations and Users

Every *user* who logs in to SmartCompany belongs to the organization. The *organization* is the user's employer and is also the subscriber to SmartCompany.

An organization may have any number of users, but it must have at least one. The number of users is limited by the terms of your subscription agreement.

When you sign up for a SmartCompany account, we create a new organization record with the information you provide and set you up as the first user in that organization. We also give you administrator privileges for your organization so you can add other users and administrators, and customize your SmartCompany environment.

Note that you cannot delete users from your organization because of the audit trails and historical data SmartCompany maintains on your behalf. You can, however, deactivate users, which locks them out of the application and removes their names from picklists.

Roles and Access Privileges

SmartCompany has a comprehensive access control system that gives you, the SmartCompany administrator, complete control over what data your users can see and to what extent they can manipulate it. User access to data is controlled by *access privileges*. Each privilege controls a specific data operation, such as "delete accounts" or "print contact lists." SmartCompany offers more than 60 privileges in all, giving you fine-grained control of access to your data.

Privileges are grouped into *roles* - a role is simply a named set of privileges. You can create as many roles as you want, and you can determine which privileges are enabled for each role. You can then assign roles to users to determine who can do what inside the application. For example, the built-in Administrator role has all privileges enabled, while the built-in Guest role allows read-only viewing of data only.



You can assign any combination of roles to a user - SmartCompany simply combines their access privileges to determine what the user can do inside the application.

Multi-User Features

SmartCompany is designed from the ground up to be a multi-user system and can support thousands of concurrent users. This section describes a few of the SmartCompany features specifically designed for multi-user environments.

Your SmartCompany login name must be a valid e-mail address

Because the SmartCompany application serves customers from all over the world, we must ensure that every user's login name is unique. Therefore, we require that you use your e-mail address as your login name. If you need to maintain multiple SmartCompany accounts for yourself, you must use a different e-mail address for each.

Furthermore, the e-mail address(es) you provide must be valid. For security reasons, we send messages to your e-mail address with links for activating your SmartCompany account, changing your password, sending you invoices, and so on. If you provide an invalid e-mail address, you will not receive these messages and won't be able to activate or manage your account.

Almost every data element has an owner

When you create an account, contact, project, or most other types of records in SmartCompany, you must designate an owner for that record. By default, you are the owner of every record you create; alternatively, you can assign ownership to any other person in your organization if your

system administrator has given you sufficient privileges to do so. A record can have only one owner.

Logging in

SmartCompany is a Web application that runs in your browser. Before you log in, you must have been assigned a user name (in e-mail address format) and a password.

To log in to SmartCompany:

1. Point your browser to www.smartcompany.net
2. In the *E-mail Address* text box, enter your login name (which must be a valid e-mail address).
3. In the *Password* text box, enter your password.
4. Click the Log In button.

SmartCompany opens at your home page with your user name displayed in the top right corner.

Forgot your password?

If you have a valid account and have forgotten your password, click the *Forgot your password?* link on the login page and SmartCompany will e-mail you instructions for resetting your password.

If you are notified that your account is invalidated, you cannot log in. See your SmartCompany administrator for assistance.

Getting login error messages?

When a user from your organization logs in to SmartCompany, the SmartCompany server checks your company's subscription status. If your subscription has expired, the user will receive an error message like: "Your subscription has expired or has not yet been activated. Please contact your system administrator."

Other login error messages include:

- "Either your email address or password is incorrect. Please try again."
- "Your SmartCompany session has expired. Please log in again."
- "Your SmartCompany account is locked. Please contact your administrator. "
- "Your SmartCompany subscription has expired or has not yet been activated. Please contact your system administrator, or send an email to support@smartcompany.net."

If the number of seats in the subscription is exceeded, you will get the following validation message: "The number of seats in the subscription has been exceeded. Reduce the number of active users before continuing or contact your SmartCompany sales rep for more subscribed seats."

If the maximum number of users has been reached, a subscribing user will receive an error message in their validation e-mail: "Your password has been saved but your account has not been activated because the number of seats in the subscription has been exceeded. Please contact your SmartCompany administrator."

As system administrator, you should first verify your subscription status by going to Setup/My Organization/Subscription Information. This section of the program informs you of your current subscription status. See the example below.



Subscription Information

Start Date:	07/08/2004	Active:	Yes
End Date:	12/31/2010	Trial:	No
Seats:	5		

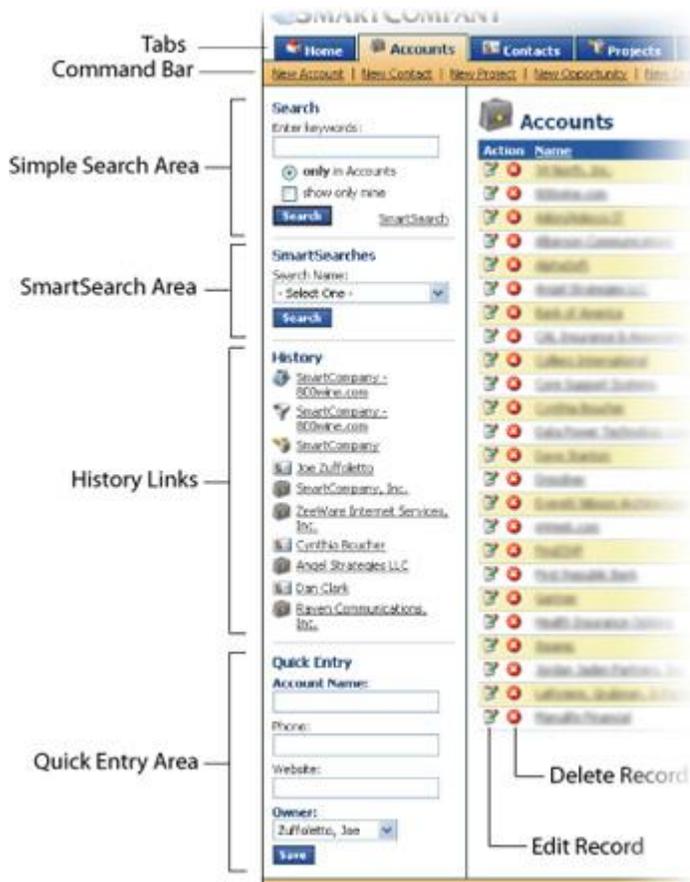
Check your subscription status in Setup/My Organization.

Subscription information is received from the SmartCompany server and cannot be altered by you.

If any details seem incorrect, if your subscription has expired, or if you have fewer users registered than you need, contact SmartCompany Technical Support at 1-800-709-SMART (76278), or your SmartCompany sales representative about renewing or upgrading your subscription.

SmartCompany Screen Layout

Although SmartCompany has a variety of screen displays, they all follow a basic layout and navigation scheme designed to make working with the application as simple as possible. The key elements of this scheme are shown in the following figure:



In all SmartCompany screens the left column is reserved for search and access controls, while the main portion of the screen (in this example, Accounts) contains records in the currently active module.

The functions of these screen elements are as follows:

- **Tabs** - Move you from module to module in the application. Click a tab to move to that module.
- **Command Bar** - A row of commands under the tabs for creating new records of various types.
- **Simple Search Area** - Enter a simple word or phrase to search the current module for records that match. You can further restrict the search to show only records owned by you. Click the Search button to start the search. Click the SmartSearch hyperlink to define a [SmartSearch](#).
- **SmartSearch Area** - A drop-down menu for selecting a previously defined [SmartSearch](#). Select a search, then click the Search button below the menu to execute the search.

- **History Links** - Links to the last 10 items you viewed in the application. The most recently viewed item is on top.
- **Quick Entry Area** (Accounts and Contacts only) - A simple data-entry area for quickly entering the basics about a new account or contact into the system.
- **Edit Record Icon**  - Click to go directly to Edit mode for the selected record in a list.
- **Delete Record Icon**  - Click to permanently delete the corresponding record in a list. If the record has other items attached to it, SmartCompany will not allow the deletion to occur - you must individually delete the attached items first.

Getting Around the Program

Navigation among SmartCompany's modules is easy. Just click a tab to go to a given module.



Once inside a module, click the command bar to access commands specific to that module.

Each module home page contains a list of the records for that module. For example, the Accounts module home page displays a list of current accounts.

Action	Name	City
 	<u>AAA Data Centers</u>	Miami
 	<u>Elephant Bar Restaurant</u>	Campbell
 	<u>EXP Pharmaceutical Management</u>	Fremont
 	<u>Graybar Electric Houston</u>	Houston
 	<u>HP Miami</u>	Miami
 	<u>Infogate</u>	Pleasant Hill
 	<u>Kell Networking</u>	Pleasanton

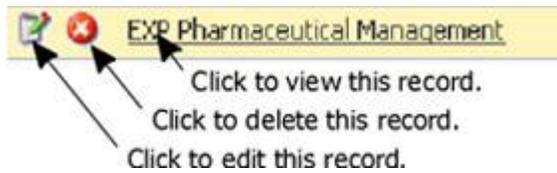
The records (accounts, contacts, etc.) of each module are listed in its home page.

Every list can be re-sorted by clicking a column head. Clicking the same head again reverses the sort.

Action	Name	Job Title	Account
 	<u>Delucchi</u>	Broker, Commercial	CAL Insurance

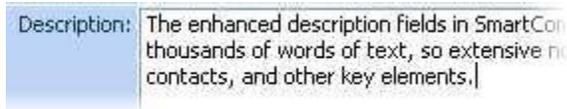
In this example the list is sorted by Name, in ascending order (see arrow).

You can access any record in detail by clicking its underlined name. Use the Edit  and Delete  icons to alter the contents of a record or to remove it permanently. (You must have permission to do this.)



No matter what module you are in, you access its records in the same way.

The description text box in most modules permits the entry of detailed notes.



The difference between viewing a record and editing it

When you select an underlined record name, the View page about that record opens, displaying all aspects of it and its connections with other modules. You can see this information but you cannot change it.

When you click the Edit button  for a listed record, the Edit page about that record opens, displaying the identifying details about the record (name, etc.) but not its connections with other records. If you have permission, you can change the details you see in the Edit page.

Logging Out

[Logging in](#) and out of SmartCompany is easy. As a general precaution, it's a good idea to log out even if you're going to be away from your computer for only a few minutes.

 For security purposes, SmartCompany will log you out automatically if no activity is detected for one hour.

To log out of SmartCompany:

- Click Log Out at the upper right corner of the screen, or simply close your Web browser.

SmartCompany Home Page

Understanding the Home Page

When you log into SmartCompany, your individualized home page is the first thing you see. Consider it your base of operations, where the current week's [events](#) and [tasks](#) are displayed.



Your SmartCompany home page is individualized: It displays events and tasks in which you are involved. At the left, the History section lets you go back to areas of SmartCompany you most recently visited. The Search function lets you search every module in the database; optionally, you can narrow the search to records you own, and/or records that are active.

✔ To resort tasks and events, click the title of the column you want to sort by. Click the title again to resort.

Ideally, the SmartCompany home page will be the default browser home page of every employee in your company who deals with customers and accounts. When you start your browser and log in, the SmartCompany home page presents you and your colleagues with a personalized, real-time "situational awareness" of tasks and events related to maximizing your business.

The Events Calendar

If you have events scheduled, the calendar will appear beside the list of events.



The calendar highlights days when you have events scheduled.

To get around the calendar:

- Note that for days on which you have events scheduled, the date number is bolded.
- Click any bolded day of a given week, and that week's events are listed in the Events area.
- Click the left and right arrows to see different months.

Navigating the Home Page

You are only a mouse click away from the other modules of the program. They are accessible by clicking the tabs across the upper portion of the window.



The Home tab's command bar contains the commands that enable you to create new records in the various modules:



New Account	Create a new account for a company you do business with
New Contact	Create a new record for a person associated with an account
New Project	Begin a new project
New Order	Place a new order
New Event	Schedule a get-together with other people
New Task	Add an item to your to-do list

See also

[Search and SmartSearch](#)

[History](#)

[Events and Calendar](#)

[Tasks](#)

Search and SmartSearch Functions

As your database grows larger, you will need a way to find records quickly. SmartCompany provides two ways: Search and SmartSearch.

Which to use?

- **Use Search** for quick, one-time look-up of a name (account, contact, etc.). In most modules the Search function gives you the option of limiting the search to a date range, but you don't have to use it.
- **Use SmartSearch** when a more detailed search query is needed: You need to find a record created over a specified time interval, and containing specific information. The SmartSearch function provides dozens of look-up parameters and enables you to save SmartSearch configurations for re-use by yourself or by colleagues.

The Search Function

Use the basic Search function when you want to find a record and you have only basic information, such as part of a name in the record.

The range of modules searched depends on the module you are in when you make a search:

- **Doing a Search from the SmartCompany Home Page or Reports module** will extract results from every module in the database. You cannot specify date ranges from these areas, but you can from other modules.

Search
Enter keywords:

 show only mine
 show only active

 **Search Results**

 **Accounts**

Action	Name
 	Conference Place
 	Open-Silicon, Inc.
 	RezConnect
 	Silicon Bandwidth
 	Teichert Construc

 **Contacts**

Action	Name
 	Brent, Derek
 	Conder, Robert
 	Crane, Stanford
 	Danens, David
 	Davis, Dana
 	Ortler, Ed

 **Opportunities**

Action	Name
 	Silicon Optix Inc.

When you do a search from the SmartCompany Home Page, results from all modules containing matching records will be listed. (See above example.) If you search from a module's home page, only that module's records will be searched.

- **Doing a Search from other SmartCompany modules** will extract results only from the records in those modules (unless you activate the *entire site* option). Note that you can specify date ranges in most module searches, using the drop down list and calendar icons.



When you do a search from a module, results from that module only will be listed unless you activate the entire site option. (See above example.) Most module searches let you specify date ranges; home page and Reports module searches do not.

Totals in searches

A blue summary bar at the bottom of a search list indicates how many matching records were found. When your search results include columns of figures (such as orders, opportunities, projects), the totals are included in this blue bar:

Sell Price	Gross Profit	Net Profit
\$11,160.80	\$11,160.80	\$11,160.80
\$11,160.80	\$11,160.80	\$11,160.80

Conducting a search

To search for a record using the Search function:

1. In the Search text box, enter the word, or part of the word, you want to search for.
 - ✔ **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation. (For more complex searches use SmartSearch, described below.)
2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want only active records to turn up in the search results, activate the *Show only active* checkbox.
4. (Optional, module searches only) If you want to search the entire database instead of just the current module, activate the *entire site* option button.

5. (Optional, module searches only) If the search is being conducted from a module (as opposed to the home page), you can specify a date range using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).
 - ✓ If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.
6. Click the Search button.
7. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will result in a blank space where the list of matching records should be.

The SmartSearch Wizard

SmartSearch is a powerful tool that enables you to locate the most obscure record in your database, whose name you have long forgotten but whose contents you require. In addition, it helps you locate clusters of records that are related in a way you specify.

Use SmartSearch when your search involves several criteria, some of them incomplete. For example, in a search of contact records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

Because you might want to carry out similar SmartSearches in future, you can assign a name to a SmartSearch you create and later invoke it from the Search Name drop down list on your home page. You have the option of making your saved searches available to all users, or only to yourself.

SmartSearch Wizard and saved SmartSearches

The SmartSearch wizard will search for records in the module you are currently working in. The wizard is not available from the home page or the Reports module.

Saved SmartSearches can be invoked from any module and are available from all modules except Setup.

SmartSearch Wizard's powerful date specification feature

The SmartSearch wizard includes a powerful date searching tool that enables you to limit searches to records created on a specific date, or over a specified date range.

As the screen image below shows, three date ranges are available: Entered, Modified and Last Touched. Each contains a drop down list. Some list option require specifying a specific date. You do so using the calendar icons . Use both calendars only when specifying a *range* of dates.

Entered Date:	Range	09/22/2004	09/30/2004
Modified Date:	After		
	On or after		
Last Touched Date:	Range		

- Today
- Tomorrow
- Yesterday
- This Week
- Next Week
- Last Week
- This Month
- Last Month
- Next Month
- This Year
- Last Year
- Next Year
- This Half
- Next Half
- Last Half
- This Quarter
- Next Quarter
- Last Quarter
- This Fiscal Year
- Next Fiscal Year
- Last Fiscal Year
- This Fiscal Half
- Next Fiscal Half
- Last Fiscal Half
- This Fiscal Quarter
- Next Fiscal Quarter
- Last Fiscal Quarter

SmartSearch parameters include a wide range of date options, and the ability to specify start and end dates.

To carry out a SmartSearch:

1. In any module except Reports, Setup, and the home page, click the SmartSearch wizard

link:  [Wizard](#)

 Only saved SmartSearches can be carried out from the home page, or the Reports module. SmartSearches cannot be conducted from the Setup module.

The SmartSearch window opens.

 **SmartSearch: Contacts**

Select an existing search to edit or execute: Name

Search Name: +

Return contacts that meet of the conditions below:

Honorific:	Equals	<input type="text" value="- Select One -"/>
First Name:	Begins with	<input type="text"/>
Last Name:	Begins with	<input type="text"/>
Account:	Equals	<input type="text"/> 
Owner:	Equals	<input type="text" value="- Select One -"/>
Job Title:	Begins with	<input type="text"/>
Department:	Begins with	<input type="text"/>
Type:	Equals	<input type="text" value="- Select One -"/>
Source:	Equals	<input type="text" value="- Select One -"/>
Entered By:	Equals	<input type="text" value="- Select One -"/>
Modified By:	Equals	<input type="text" value="- Select One -"/>
Last Touched By:	Equals	<input type="text" value="- Select One -"/>
Description:	Begins with	<input type="text"/>

 **Address Information**

Work Address:	Begins with	<input type="text"/>
City:	Begins with	<input type="text"/>

2. Review the search options and set search conditions using the minimum number of options.
3. From the *Return contacts* drop down list, specify whether you want the search to match All or Any of the search options.
4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only by you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

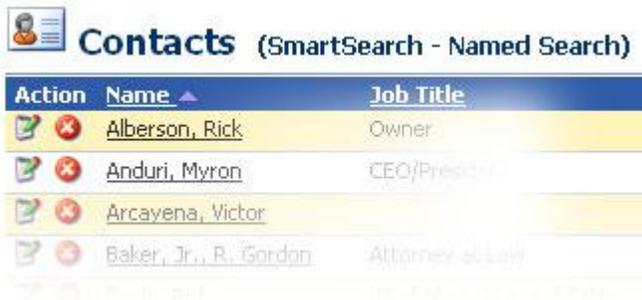
 You can specify which categories the records you want to find are in, or NOT in. See the example below.



Similarly you can specify records which were **NOT** created on a given date:



5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.



A SmartSearch list will always be identified as such. If it's a named SmartSearch, the name will appear at the top of the list, too.

Note in the example above that you can reorder the search by clicking a column header. Click the header again to reverse-sort by the names in that header. An arrow beside a header title indicates the active search header, and the direction of the search:



An unsuccessful search will open a message stating that no matches were found.

Conducting a saved search

If you want to repeat a search you've done before and saved, select its name from the Search Name drop down list then click the Search button. You can also invoke SmartSearches by selecting them from the drop-down menu that appears on the left side of most SmartCompany screens.

Deleting a saved search

To delete a saved search, open the name of the saved search in the drop down list, then click the Delete icon  beside the list.

See also

[Understanding the SmartCompany Home Page](#)

[History](#)

[Events and Calendar](#)

[Tasks](#)

History Function

The History section displayed on every SmartCompany page consists of a list of the last 10 items you viewed in SmartSearch, in chronological order. To return quickly to an item you were working on recently, click its name in the History list.

History

-  [HP Miami](#)
-  [Dan MacDonald](#)
-  [EXP Pharmaceutical Management](#)
-  [EXP Site Monitoring](#)
-  [David Danens](#)
-  [HP Miami Data Center-Enclosures](#)
-  [AAA Data Centers](#)
-  [Elephant Bar UPS](#)

Click the underlined name of an item in the History list to go to that item.

You can tell which module a listing is from by the icon displayed beside its name. (Compare with the icons in the module tabs at the top of the application window.)

Viewing new records will bump the oldest items from the list.

See also

[Understanding the SmartCompany Home Page](#)

[Search and SmartSearch](#)

[History](#)

[Events and Calendar](#)

[Tasks](#)

Events and the Calendar

Working with Events

Events are *scheduled appointments* -- sales calls, meetings, and so on -- that you set up on the calendar. SmartCompany automatically reminds you of the current week's events when you log in.

SmartCompany Event records are now compatible with Microsoft Outlook, enabling future linkage between the calendars of both applications. SmartCompany enables you to schedule private events, inaccessible by others, and include Outlook's "Show Time As" feature for its upcoming group schedule release (not yet supported).

Events		New
Wednesday, August 4, 2004		
1:00 PM - 2:30 PM	Avenue Gap Analysis with Girish	
3:00 PM - 4:00 PM	LaRene Pare	
Thursday, August 5, 2004		
4:00 PM - 6:00 PM	Company Meeting	
Friday, August 6, 2004		
11:45 AM - 1:15 PM	Lunch with John Mulvihill	
2:00 PM - 3:00 PM	Call Chris Baggot	

Your SmartCompany home page lists events and tasks that include you.

Events can be associated with contacts, so you can keep a running history of your interactions with other people. You can also associate events with accounts, projects, opportunities, and orders.

The Events Calendar

A monthly events calendar appears beside the list of events.

July 2004						
S	M	T	W	T	F	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

The calendar highlights days when you have events scheduled.

To get around the calendar:

- Note that days on which you have events scheduled, the date number is bolded.
- Click any day of a given week, and that week's events are listed in the Events area.
- Click the left and right arrows to see different months.

See also

[Creating an Event](#)

[Viewing an Event](#)

[Editing an Event](#)

[Deleting an Event](#)

[Working with Tasks](#)

[Understanding the SmartCompany Home Page](#)

Creating an Event

You can create events from any SmartCompany module.

To create an event:

1. Click New Event on the command bar of the current module. The Edit Event window opens.

The "Private" and "Show Time As" options are included for Microsoft Outlook record compatibility.

2. Fill in the details about the event.

Subject: Give the event a brief, descriptive title.

Owner: By default the logged-in user is the owner of the event. Change owners using the drop down list if necessary.

Date: Enter the date in the text box. Alternatively, click the Calendar icon  and in the calendar, select month using right and left arrow keys, then click on the day of the event.

Start Time: Enter the start time in this format: for example, 9:00 AM.

Duration: Enter the duration in hours and minutes OR activate All Day Event (below).

All Day Event: (Optional). Activate the check box if the event is expected to last the entire day.

Show Time As: Specify how you want your calendar to appear to others during this event.

Private: Activate to restrict access to event details only to the people involved.

Location: Enter a location in sufficient detail for yourself and any other attendees.

Contact: Enter your primary contact for this event: either the whole name or part of a name and select from the list that appears automatically. Alternatively, click the Search icon  and use SmartCompany's search function.

Related to: If you want to relate this event to an existing account, project, opportunity or order, select one from the drop down list. Then enter the name or part of a name and select from the list that appears automatically. Alternatively, click the Search icon  and use SmartCompany's search function.

Description: Type a description of the event in sufficient detail to inform your organization's colleagues about the nature of the event.

Attendees: Select which of your organization's colleagues should be notified of the event so they can attend. Alternatively, Click Select All.

3. Click Save to save the event.

To save the current contact and create a new one right away, click Save and New.)

The event will now appear on your calendar, and on the calendars of attendees. On the day of the event, it will appear on the home pages of all attendees in your organization.

See also

[Working with Events](#)

[Viewing an Event](#)

[Editing an Event](#)

[Deleting an Event](#)

Viewing an Event

This feature lets you see the details of an event. You cannot change an event's details in this screen.

To view an event:

1. Go to the home page and, if the event is not listed, bring it up on the events list using the [calendar](#).
2. Click the underlined name of the event. It will open in View mode.



View Event

Edit
Done

Subject:	Company Meeting
Owner:	Wells, Gary
Date:	Thursday, August 5, 2004
Start Time:	4:00 PM
Duration:	2 hours 00 minutes
Location:	SmartCompany
Contact:	
Related To:	
Entered:	Gary Wells 08/05/2004 11:45 AM
Modified:	Gary Wells 08/05/2004 11:45 AM
Description:	



Attendees

Top

Gendler , Rosti

Seay , Phil

Wells , Gary

Wiggins , Paul

Zuffoletto , Joe

To change any of the event's details, click the Edit button. (If there is no Edit button that means you don't have sufficient privileges to edit events.)

See also

[Working with Events](#)

[Creating an Event](#)

[Editing an Event](#)

[Deleting an Event](#)

Editing an Existing Event

You can change the details of scheduled events. The changes will be accessible to all event attendees as soon as you save them.

To edit an event:

1. Go to the home page and, if the event is not listed, bring it up on the events list using the [calendar](#).
2. Click the underlined name of the event. It will open in View mode.
3. Click the Edit button. The event opens in Edit mode.
4. Make changes to the event by entering new information in the text boxes.
5. Click Save. The event details are immediately updated and accessible to all attendees.

 **SHORTCUT:** From the list of events in the home page, click the Edit icon  beside the event you want to edit.

See also

[Working with Events](#)

[Creating an Event](#)

[Viewing an Event](#)

[Deleting an Event](#)

Deleting an Event

When you delete an event, it will disappear from the calendars of all attendees in your organization.

To delete an event:

1. Go to the home page and, if the event is not listed, bring it up on the events list using the [calendar](#).
2. Click the underlined name of the event. It will open in View mode.
3. Click the Edit button. The event opens in Edit mode.
4. Click Delete. After a confirmation, the event is removed from the database.

SHORTCUT: From the list of events in the home page, click the Delete icon  beside the event you want to delete.

See also

[Working with Events](#)

[Creating an Event](#)

[Viewing an Event](#)

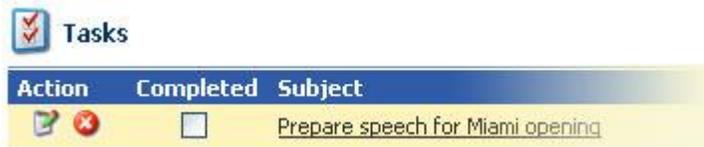
[Editing an Event](#)

Tasks

Working with Tasks

Tasks are items on your to-do list. They help you remember things that you need to get done.

SmartCompany Task records are now compatible with Microsoft Outlook, enabling future linkage between the calendars of both applications.



Your SmartCompany home page lists tasks for the current week.

When you log into SmartCompany, your pending tasks for the upcoming week are displayed on the home page, as well as overdue tasks (shown in red) that you haven't completed yet.

Tasks can be associated with contacts, so you can keep a running history of your interactions with other people. You can also associate tasks with accounts, projects, opportunities, and orders.

See also

[Creating a Task](#)

[Viewing a Task](#)

[Editing a Task](#)

[Completing a Task](#)

[Deleting a Task](#)

[Events and Calendar](#)

[Understanding the SmartCompany Home Page](#)

Creating a Task

You can create tasks from any SmartCompany module.

To create a task:

1. Click New Task on the command bar of the current module. The Edit Task window opens.

1. Fill in the details about the task.

Subject: Give the task a brief, descriptive title.

Owner: By default the logged-in user is the owner of the task. Change owners using the drop down list if necessary. (You would do this if you are creating a task on behalf of another user.)

Priority: Select the task's priority from the drop down list.

Status: Select the task's completion status from the drop down list.

Complete %: Enter the percentage of completion for this task. (This field has been added to ensure compatibility with MS Outlook.)

Private: Activate to restrict access to task details only to the people involved. (This field has been added to ensure compatibility with MS Outlook.)

Contact: Enter your primary contact for this task -- either the whole name or part of a name -- or click the Search icon  to bring up a list of matching saved contacts.

Related to: If you want to relate this task to an existing account, project, opportunity or order, select one from the drop down list. Then enter the name or part of a name and select from the list that appears automatically. Alternatively, click the Search icon  and use SmartCompany's search function.

Due Date: Enter the date in the text box. Alternatively, click the Calendar icon  and in the calendar, select month using right and left arrow keys, then click on the day you want to specify as the due date for this task.

Description: Type a description of the task in sufficient detail to inform your SmartCompany colleagues about the nature of the task.

Assign Others: Select which of your organization's colleagues will be involved with this task and should be kept up to date. Alternatively, Click Select All.

3. Click Save to save the task.

 To save the current contact and create a new one right away, click Save and New.)

The task will now appear on your home page summary and in the calendar.

See also

[Working with Tasks](#)

[Viewing a Task](#)

[Editing a Task](#)

[Completing a Task](#)

[Deleting a Task](#)

Viewing a Task

This feature lets you see the details of a task. You cannot change a task's details in this screen.

To view a task:

1. Go to the home page and, if the task is not listed, bring it up on the tasks list using the [calendar](#).
2. Click the underlined name of the task in the Subject column. It will open in View mode.

To change any of the task's details, click the Edit button.

See also

[Working with Tasks](#)

[Creating a Task](#)

[Editing a Task](#)

[Completing a Task](#)

[Deleting a Task](#)

Editing a Task

You can change the details of scheduled tasks. The changes will be accessible to all task attendees as soon as you save them.

To edit a task:

1. Go to the home page and, if the task is not listed, bring it up on the tasks list using the [calendar](#).
2. Click the underlined name of the task in the Subject column. It will open in View mode.
3. Click the Edit button. The task opens in Edit mode.
4. Make changes to the task by entering new information in the text boxes.
5. Click Save. The task details are immediately updated and accessible to all attendees.

 **SHORTCUT:** From the list of tasks in the home page, click the Edit icon  beside the task you want to edit.

See also

[Working with Tasks](#)

[Creating a Task](#)

[Viewing a Task](#)

[Completing a Task](#)

[Deleting a Task](#)

Deleting a Task

When you delete a task, it will disappear from the home page listing and from the calendar.

To delete a task:

1. Go to SmartCompany home page and, if the task is not listed, bring it up on the tasks list using the [calendar](#).
2. Click the underlined name of the task. It will open in View mode.
3. Click the Edit button. The task opens in Edit mode.
4. Click Delete. After a confirmation, the task is removed from the database.

SHORTCUT: From the list of tasks in the home page, click the Delete icon  beside the task you want to delete.

See also

[Working with Tasks](#)

[Creating a Task](#)

[Viewing a Task](#)

[Editing a Task](#)

[Completing a Task](#)

Completing a Task

To mark a task as completed:

1. Go to the home page and, if the task is not listed, bring it up on the tasks list using the [calendar](#).
2. Activate the Completed check box beside the task's name. The edit screen opens automatically and the details of the task are displayed
3. Enter additional or concluding information about the task.
4. Click Save. The task is removed from the calendar and home page listing but is retained in the database for audit and reporting purposes.

See also

[Working with Tasks](#)

[Creating a Task](#)

[Viewing a Task](#)

[Editing a Task](#)

[Deleting a Task](#)

Accounts Module

Understanding Accounts

Accounts represent companies or other organizations with whom you do business. They can be prospects, customers, vendors, partners, and so on. Since accounts form the core of your business, the Accounts module of SmartCompany is where you will spend most of your time with the application. To get there, just click the Accounts tab.

Accounts are the center of the SmartCompany universe. Almost every other kind of SmartCompany data is associated with an account, giving you a 360-degree view of the organization. When you examine an account in [View mode](#), you can see a complete history of your company's interactions with it.



Accounts are the hub of your SmartCompany database.

The Accounts Home Page

When you click the Accounts tab, its home page opens to display a list of your currently configured accounts.

Action	Name	City
 	<u>AAA Data Centers</u>	Miami
 	<u>Elephant Bar Restaurant</u>	Campbell
 	<u>EXP Pharmaceutical Management</u>	Fremont
 	<u>Graybar Electric Houston</u>	Houston
 	<u>HP Miami</u>	Miami
 	<u>Infogate</u>	Pleasant Hill
 	<u>Kell Networking</u>	Pleasanton

- To **view** an account, click its underlined name in the list.
- To **edit** an account, click the Edit icon  beside its name.
- To **delete** an account, click the delete icon  beside its name.

- **To [search for an account](#)**, enter a keyword in the Search text box at the top left of the window and click [Search](#).
- **To [add a new account quickly](#)** (for example, during a phone conversation), use the [Quick Entry](#) feature.

Other things you can do from the Accounts home page

From the Accounts home page you can also:

- [SmartSearch](#) for accounts using multiple criteria
- [Create](#) new accounts in detail
- [Add contacts](#) to an account
- [Assign categories](#) to an account
- [Add notes](#) to an account
- [Add tasks and events](#) to an account
- [Transfer ownership of an account](#) to someone else
- [Quickly create](#) a new account
- [Create a Print or Export File](#) of your list of accounts

Viewing Accounts

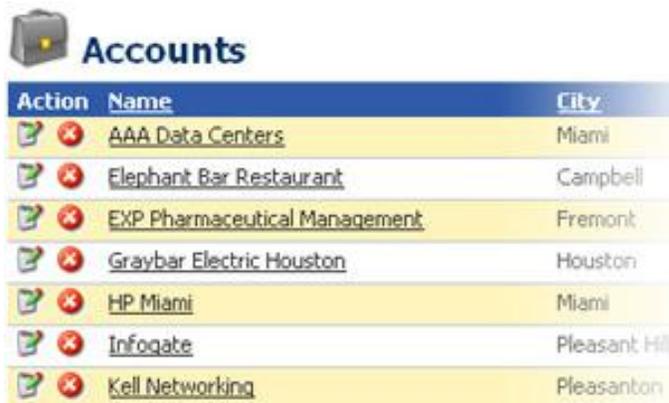
Accounts and all other records have three viewing modes:

- **List Mode** - A list of accounts that appears when you go to the Accounts home page. Use this to [create export files](#) or to drill down to individual accounts.
- **View Mode** - Read-only display of account details and all related records. Use this view to get the "big picture" of an account, in relation to all your business activities.
- **Edit Mode** - An editable display of account details. Use this to make changes to a record.

Viewing in List Mode

In the Accounts home page, all accounts are listed in the main window.

- ✓ You can resort the list by clicking an underlined column head. Click again to reverse-sort.



The screenshot shows the 'Accounts' home page with a table listing several accounts. The table has three columns: 'Action', 'Name', and 'City'. The 'Name' column contains underlined text, indicating it is clickable. Each row also includes a small icon with a red 'X' next to it.

Action	Name	City
 	<u>AAA Data Centers</u>	Miami
 	<u>Elephant Bar Restaurant</u>	Campbell
 	<u>EXP Pharmaceutical Management</u>	Fremont
 	<u>Graybar Electric Houston</u>	Houston
 	<u>HP Miami</u>	Miami
 	<u>Infogate</u>	Pleasant Hill
 	<u>Kell Networking</u>	Pleasanton

In a module's home page, all of its records are listed.

- ✓ If you have sufficient privileges, you can save this list to a PDF or Excel file for distribution and analysis by clicking the Print or Export button. See [Creating a Print or Export file](#).

Going to other modes from the list

Go to the other modes, or delete a record, by clicking its underlined name or clicking an icon:

Viewing in View Mode

To view an account in View mode, click its underlined name in the account list.



Account: SmartCompany, Inc.

Owner:	Zuffoletto, Joe	Account Number:	
Rating:	High	Ticker Symbol:	
Type:	Supplier	SIC Code:	
Industry:	Technology	Annual Revenue:	
Ownership:	Private	Employees:	
Entered:	Joe Zuffoletto 06/20/2004 1:33 PM	Website:	
Modified:	Joe Zuffoletto 06/20/2004 1:33 PM		
Last Touched:	Joe Zuffoletto 06/20/2004 1:34 PM		
Description:	Creators of SmartCompany.		



Address Information

Billing Address:	2121 North California Blvd. Suite 360 Walnut Creek, CA 94596 USA	Shipping Address:	
Phone:	(925) 934-6355	Phone:	
Fax:	(925) 934-6694	Fax:	



Categories

Hotlist
Mailing List

View mode displays related records in all modules.

✔ You can also view a record by clicking any hyperlink to the record that appears anywhere in SmartCompany. (Hyperlinks are underlined names that appear in the account list, or in the view pages for contacts, projects, orders, and opportunities, or in reports.)

When you open a record for viewing, you can see all aspects of the account and its links to other modules, but you cannot make changes directly to the screen.

- To *edit the account*, click the Edit button at the top right of the screen.
- To *make additions to the listed areas* below, click New in the area. (For example, to add a note, click New in the Notes summary.)
- *Click Done when finished viewing*, and you will be returned to the previous window.

Viewing, editing and deleting related records from other modules

In View mode, all records related to the current one are displayed in summary form.

Contacts		
Action	Name	Job Title
 	<u>Brown, Joseph</u> 	Purchasing Manager
 	<u>Rogers, Bob</u>	

Participant In		
Action	Type	Name
 	Project	HP Data Center Miami

In View mode, all related records are summarized.

You can access and alter these records directly from the View screen:

- To view a related record, click its underlined name.
- To edit a related record, click the Edit icon  beside its name.
- To delete a related record, click the delete icon  beside its name.

Viewing in Edit Mode

To access Edit mode from the other View modes:

- From List mode, click the Edit icon  beside the account's name.
- From View mode, click the Edit button.

Edit Account <small>(Items in bold are required)</small>	
Name:	AAA Data Centers
Owner:	Smith, Bob 
Rating:	High 
Type:	Analyst 
Industry:	Technology 
Ownership:	Unknown 
Description:	Write specs for data center implementation

In Edit mode you can make changes to a record's details.

Use Edit mode to [make changes](#) to a record's details.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Creating an Account

An *account* is any organization you do business with or have an official association with. Your accounts could include client companies, suppliers, business groups, and so on. The people who belong to your accounts are called *contacts* and are cataloged in the Contacts tab.

To create a new account:

1. Click the New Account link in the command bar:



The Edit Account page appears.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - The name of the account: for example, "SmartCompany, Inc."

Owner - The user in your organization who is responsible for this account. The default owner is the user creating the account, but you can choose any other user if you have privileges to do so.

Rating - The account's importance to your organization.

Type - The type of organization the account represents.

Industry - The industry to which the account belongs.

Ownership - The stock ownership structure of the account.

Short Name - Enter a "nickname" to be used in SmartCompany to find this record quickly, with minimal text entry. For example, an account named "Paramount Numismatics" could be designated a short name "PN" and their account records called up more quickly by invoking the short name.

Account Number - This can be any value. For example, if your company has a paper-based filing system, you can enter the physical file number of the account here.

Ticker Symbol - The stock ticker symbol of the account if it is publicly traded.

SIC Code - The Standard Industry Classification code for the account. [Click here](#) to access a SIC code database managed by the U.S. Department of Labor. (You can also click the SIC Code label to access this database.)

Annual Revenue - The account's annual revenue (their revenue, not the revenue they generate for your company).

Employees - The number of employees at the account.

Website - The account's Web address: for example, www.smartcompany.net.

Active - By default a new account is active on the system. Because all records are related in the database, you might prefer to deactivate an unused account rather than delete it, to preserve its links with other records on the database.

Private - If activated, the record is accessible only to you, its owner.

Primary Location - Enter the primary billing and shipping addresses for the account. For U.S. addresses, we recommend using two-letter state abbreviations and either 5 or 9-digit Zip codes.

 **An account can have multiple addresses and phone numbers:** Primary, Billing, Shipping, Home, and Other. The primary address is specified in the Account module. The Home address is specified in the Contacts module. Other addresses are specified in the New Opportunity module or the Orders module.

Copy to Contacts: If active, changes in your address information will be propagated to Contact records related to this account: **Match** drop down list option means the change will be restricted to contacts with the same address; **All** drop down list option means all contact addresses will be updated regardless of whether they are the same as the account address.

Categories - Choose one or more categories to which this account belongs. Your system administrator can change the list of categories. See Managing Account Picklists for more information.

3. When you are finished, click Save to save the new account into your database.

 To save the current contact and create a new one right away, click Save and New.)

The account information you have just entered will appear in View mode. Click Edit if revisions are necessary.

Once your new account is created, go to click New Contact on the command bar to add people to it. Your account must contain at least one contact.

See also

[Understanding Accounts](#)

[Viewing an Account](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

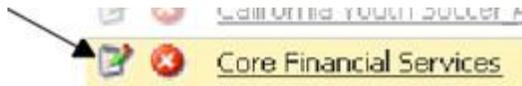
[Creating a Print or Export File](#)

Editing an Account

To make changes to an account's details, you must have the required permissions, and you must be in Edit mode.

To edit an account:

1. From the Accounts home page or the account view screen, go into Edit mode:
 - *To edit an account from the account home page*, click the Edit icon  next to its name in the list.



- *To edit an account from the account view screen*, click the Edit button at the top right of the window.

The account record opens in Edit mode.

2. Make the changes you want to the account by typing new information into the text boxes.
3. Click Save. The account is updated on the database with the information you have just entered.

 **DISCARDING CHANGES AND DELETING ACCOUNTS:** You can discard changes before saving by returning to the previous screen. Click Delete to permanently delete the account from the database. This button is not visible if you do not have delete privileges.



Copy to Contacts: If active, changes in your address information will be propagated to Contact records related to this account: **Match** drop down list option means the change will be restricted to contacts with the same address; **All** drop down list option means all contact addresses will be updated regardless of whether they are the same as the account address.

See also

[Understanding Accounts](#)

[Viewing Accounts](#)

[Creating an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

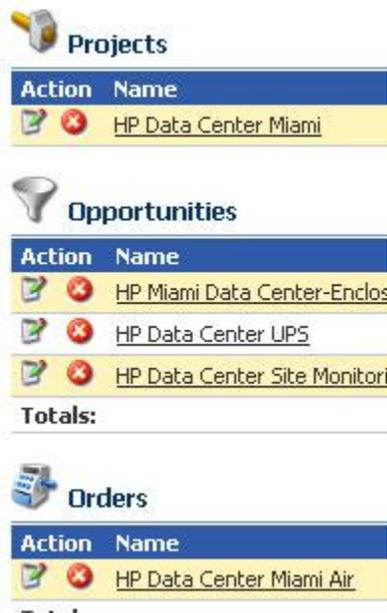
[Creating a Print or Export File](#)

Deleting an Account

To delete an account, you must have the required permissions, and all records related to the account must previously have been deleted.

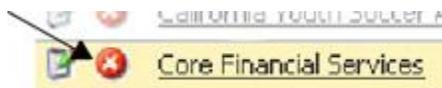
To delete an account:

1. From the Accounts home page, click the underlined name of the account you want to delete. The account record opens in View mode.
2. Scroll down the account's listing and, in every module where records are displayed, click the Delete icon  to remove all records associated with this account.



Before deleting the account itself, delete all records associated with an account.

3. Click Done to return to the Accounts home page, where you will see the account in the list.
4. Click the Delete icon  next to the name of the account your want to remove permanently from the database.



- ✓ Alternatively, you can click either of the Delete buttons at the top and bottom right of the account edit page.

After a confirmation query, the account will be removed from the database.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Searching for Accounts

SmartCompany gives you two ways to locate a specific account on the database.

- *If you know all or part of the account's name, short name, or number, use the basic Search function.*
- *If you need to search by something other than name, use the SmartSearch function.*

Using the basic Search function

To search for an account using the Search function:

1. In the Accounts home page, type all or part of the name, short name, or number of the account you want to find in the Search text box.

 **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation.
2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want to search the entire database instead of just the current module, activate the *entire site* option button.
4. (Optional) You can specify a date range for the search using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).
 -  If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.
5. Click the Search button.
6. If your search is successful, accounts that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

Using the advanced SmartSearch function

Use SmartSearch when your search involves several criteria. For example, in a search of contact records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

✔ Another use for SmartSearch is finding a cluster of records that have some specified element in common.

To carry out a SmartSearch:

1. In any module, click the SmartSearch wizard link:  [Wizard](#)
- The SmartSearch window opens.
2. Review the search options and set search conditions using the minimum number of options.
 3. From the *Return contacts* drop down list, specify whether you want the search to match All or Any of the search options.
 4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only to you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, accounts that match your search will be listed in the application window. You can [view, edit or delete](#) an account by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found.

See [this link](#) for more information about using SmartSearch.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

SmartCompany 3.1 Online Help

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Adding Projects to an Account

Projects are organized activities that involve multiple staff working toward a specified goal. The goal is reflected in the name of the project (e.g., New Harrison Account).

Every project is connected to a single account. Projects can be created in the [Projects](#) module, or on the fly from the Accounts module.

To add projects to an account:

1. From the Accounts home page, click the underlined name of the account to which you want to add projects. The account opens in View mode.
2. Scroll down to the Projects section and click New. The Edit Projects window opens.
3. Fill in the text boxes. See [Creating a Project](#) for details.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The project is added to the account's summary information. Repeat this process to add additional projects.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

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[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Adding Opportunities to an Account

Opportunities represent potential sales that haven't closed yet. Opportunities can be created in the [Opportunities](#) module, or on the fly from the Accounts and Project modules.

To add opportunities to an account:

1. From the Accounts home page, click the underlined name of the account to which you want to add opportunities. The account opens in View mode.
2. Scroll down to the Opportunities section and click New. The Edit Opportunities window opens.
3. Fill in the text boxes. See [Creating an opportunity](#) for details.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The opportunity is added to the account's summary information. Repeat this process to add additional opportunities.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

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Adding Contacts to an Account

Contacts are people associated with accounts. For example, if you set up an account for a client company, one of your contacts in that company could include the person who gives orders to your sales staff. Accounts can have any number of contacts, or none at all.

To create new contacts for an account:

1. From the Accounts home page, click the underlined name of the account to which you want to add contacts. Its details appear in View mode.
2. Click the New Contact link in the command bar. The Edit Contact page appears. Note that some of the address and phone information is pre-filled from the account data.
3. Fill out the form, including as many details as you have available for this contact.
 **A NOTE ABOUT FORMS:** Your SmartCompany administrator specifies the fields and categories in the Setup module. If you are unsure of a field or category's content, ask your administrator.
4. Click Save. The contact record is saved to the database and associated with the account.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Orders to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Adding Orders to an Account

Orders are closed sales that bring revenue to the company. Orders can be created in the [Orders](#) module, or on the fly from the Accounts module.

To add orders to an account:

1. From the Accounts home page, click the underlined name of the account to which you want to add orders. The account opens in View mode.
2. Scroll down to the Orders section and click New. The Edit Orders window opens.
3. Fill in the text boxes. See [Creating an order](#) for details.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The order is added to the account's summary information. Repeat this process to add additional orders.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Assigning Categories to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Assigning Accounts to Other Users](#)

[Quick Entry of a New Account](#)

[Creating a Print or Export File](#)

Assigning Categories to an Account

Categories are general classifications under which accounts can be grouped. Accounts can then be summarized by category, and similarly, on-screen lists can be composed by category.

The SmartCompany administrator creates categories in the Setup module. Categories are assigned when an account is created, or later in Edit mode.

New categories can be created at any time, then applied to accounts. Follow the procedure below to assign existing categories to an existing account.

To assign categories to an account:

1. From the Accounts home page, click the Edit icon  beside the name of the account you want to access. The account opens in Edit mode.
2. Scroll down to the Categories list near the bottom of the window. Currently assigned categories have their check boxes activated.



In this example, the Chamber Mixer, E-mail Blast 6/04, and Mailing List categories are active.

3. Activate the check boxes of categories you want to apply to this account.
4. Click Save. The account is updated.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

[Adding Contacts to an Account](#)

[Adding Orders to an Account](#)

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Adding Notes

Notes are written comments and observations that can be composed while talking to a contact on the phone or catching up on e-mail. Notes can be written by any user with access to a module that supports notes: Accounts, Contacts, Projects, Opportunities, and Orders.

The writer of a note -- its "owner" -- is listed with the note itself in case internal discussion is warranted.

Notes about an account can be reviewed whenever a module is in [view](#) mode.

To add a note:

1. From the module's home page, click the underlined name of the record you want to annotate. The module opens in View mode.
2. Scroll down to the Notes section and click New. The Edit Note window opens.

Edit Note (Items in **bold** are required)

Subject:	Order confirmation
Owner:	Smith, Bob
Related To:	Account AAA Data Centers
Date:	07/26/2004
Time:	2:14 PM
Description:	George Heath at AAA verbally confirmed Order #2938 today by phone.

3. Fill in the text boxes as required, and enter your note in the Description area.
 - ✓ Use the [Calendar](#) feature to set the date, or just type it into the Date text box.
4. Click Save. The note is added to the summary information of the module in the Notes section.

Notes

- Tuesday, May 25, 2004 9:12 AM - **Zuffoletto, Joe** : **Sublease agreement**
Their CFO approved the sublease agreement. We can take possession July 1st.
- Tuesday, May 18, 2004 1:00 PM - **Zuffoletto, Joe** : **Sublease Agreement**
Returned my call about the sublease agreement. Said that it needed to be reviewed.
- Monday, May 17, 2004 3:27 PM - **Zuffoletto, Joe** : **Phone Call**
Called to get status on sublease agreement. Left a voicemail.

Editing Notes

To delete a note, click the Edit icon  beside the note's name, as shown above.

Deleting Notes

To delete a note, click the Delete icon  beside the note's name, as shown above.

See also

[Adding Documents](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Documents

Use this feature to attach documents to a record that are specific for only that record: invoices, purchase orders, quotes, contracts, and so on. If a document is general in nature and intended for viewing by all users, add it to the [document library](#) instead.

Documents can be attached to an account of the following type: account, contact, project, opportunity, and order by going to that account's Document section and clicking New.

In addition, they can be attached to the following record types: purchase orders, invoices, quotes or bids.

The procedure below describes how to add a document to a record. Further down, procedures describe how to edit and delete documents already attached to the record, and how to access them.

Adding Documents to a Record

To add a document to a record:

1. From any open record, scroll to the bottom of the window to the Document area and click New.

The New Document window opens.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - Since you are attaching the document to a record, this area is already filled in. Do not make changes to it.

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

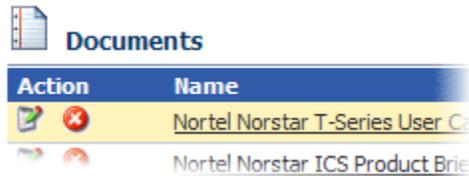
3. When you are finished, click **Save** to attach the new document to the record.

Editing and Deleting Attached Documents

To edit or delete a document that is attached to a record:

1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document for editing or deletion.
 - **To edit a document's description**, click the edit icon  beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - **To delete a document**, click the delete icon  beside its name. Confirm the deletion, and the document is removed from the database.

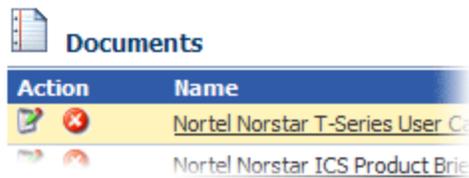
Accessing Documents Attached to Records

To access a document attached to a record, you must first open the record.

To open a document that is attached to a record:

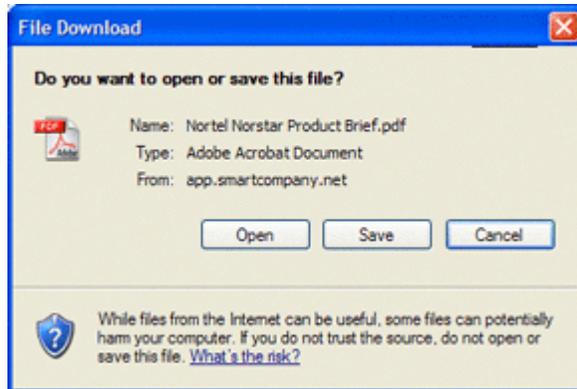
1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The file opens for your review.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Tasks and Events

By incorporating [tasks](#) and [events](#) into a module, you can see a summary of all tasks and events related to that module when it is open in [view](#) mode. You can incorporate tasks and events into the following modules: Accounts, Contacts, Projects, Opportunities, and Orders.

NOTE: Before you can link tasks and events to an account, they must already exist on the database.

To add a tasks and events to a module:

1. From the module's home page, click the underlined name of the record to which you want to add tasks and events. The module opens in View mode.
2. Scroll down to the Tasks and Events section and click New Task or New Event. The Edit Task or Edit Event window opens.
3. Fill in the task/event window as required. For details, see [Working with Tasks](#) and [Working with Events](#).
4. Click Save. The task/event window changes to View mode. Click Done to complete the addition.

The task or event is added to the module's summary information. Repeat this process to add more tasks and/or events.

See also

[Adding Notes](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Transferring Ownership

Every record (e.g., account, contact, project, etc.) has an *owner*: the person responsible for that record.

When the record is created, its ownership is assigned by default to the person logged in during its creation.

Ownership of a record can be transferred at any time by a user with the necessary privileges.

To assign a record's ownership to another user:

1. From the home page of the module where the record is stored, click the Edit icon  beside the name of the record whose ownership you want to transfer. The record opens in Edit mode.
2. From the Owner drop down list, select the name of the user to whom you want to transfer ownership of the record.
3. Click Save. The record appears in View mode with the new owner assigned.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

Quick Entry of a New Account

Use this feature to add a new account quickly -- for instance, when you're talking on the phone to a prospective customer.

To use Quick Entry:

1. Click the Accounts tab to go to the Accounts module.
2. In the Quick Entry section at the bottom left of the Accounts window, enter the account's name, phone number and Web address -- or as much information as you have.
3. From the Owner drop down list, select the employee in your company who will be responsible for this account. Because you are currently logged in, you are listed by default as the owner of the account.
4. Click Save.

The new account is saved to the database and appears on the account list.

When you have the time and information, [edit this account](#) to include the additional details required.

See also

[Understanding Accounts](#)

[Creating an Account](#)

[Viewing Accounts](#)

[Editing an Account](#)

[Deleting an Account](#)

[Searching for Accounts](#)

[Adding Projects to an Account](#)

[Adding Opportunities to an Account](#)

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[Assigning Accounts to Other Users](#)

[Creating a Print or Export File](#)

Creating a Print or Export File

You can save your active module's summary list in PDF (Portable Document Format) or XLS (Excel) format for distribution and analysis by clicking the Print or Export button. For example, from the Accounts module home page, you could create an Acrobat-readable or Excel-format file of your list of accounts.

To create a print or export file:

1. Go to the home page of the module whose master list you want to print. (For example, to print a list of contacts, click the Contacts tab.)
2. Click the button that corresponds to the type of file you want to create.
 - *To create an Excel-compatible (XLS) file, click the Export button.*
 - *To create an Acrobat-compatible (PDF) file, click the Print button.*
3. Follow the file save instructions provided by your browser, and select a folder to store the file.

See also

[Importing Contacts](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

Importing Accounts and Contacts

Use the Import wizard to import account and contact records from other applications like ACT!, GoldMine, salesforce.com, and Outlook. The wizard enables you to map imported records to your existing account and contact data record format.

✔ **Only users with import privileges can carry out this function.** Go to Setup/Roles and click the Edit icon  for the user type to which you want to assign import privileges. In the Edit Role window, scroll down to the Setup area and activate the *Import Accounts and Contacts* check box.

To import contact records:

1. Click the Setup tab to go to the Setup module.
2. From the Setup menu at left, select Import Accounts and Contacts.

The first page of the Import wizard opens.



3. Select the source file and mapping type (the originating program), then work your way through the wizard to import accounts and contacts. Instructions are included in the wizard.

✔ To print out instructions from the wizard, highlight the instructions, right click, then select Print. In the Print dialog box click Selection in the Page Range area, then click Print.

See also

[Understanding Setup](#)

[Setting Up My Organization](#)

[Setting Up My Account](#)

[Setting Up Roles](#)

[Setting Up Users](#)

[Setting Up Lists](#)

[Setting Up Vendors and Products](#)

[Setting Up a Document Library](#)

Contacts Module

Understanding Contacts

Contacts represent the people with whom your organization does business. Along with accounts, they form the basis for most of the information management that takes place within SmartCompany.

Contacts must be associated with [accounts](#), and you must create an account before creating its contacts. SmartCompany makes this easier by allowing you to create a new account on the fly while you're creating a contact.

Once you have created a contact, you can attach any number of notes, tasks, and events to it. This allows you to keep a running history of your interactions with the contact that you can review every time you bring up the contact.

You can also assign custom [categories](#) to your contacts and search on those categories later. This feature is especially useful for tracking marketing campaigns, mailing lists, leads from trade shows, and so on.

See also

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Viewing Contacts

Contacts and all other records have three viewing modes:

- **List Mode** - A list of contacts that appears when you go to the Contacts home page. Use this to export files or to individual records.
- **View Mode** - Read-only display of contact details and all related records. Use this view to get the "big picture" of the contact, in relation to all your business activities.
- **Edit Mode** - An editable display of contact details. Use this to make changes to a record.

Viewing in List Mode

In the Contacts home page, all contacts are listed in the main window.

✓ You can resort the list by clicking an underlined column head.



The screenshot shows the 'Contacts' home page. At the top left is a small icon of a person. To its right is the title 'Contacts'. Below this is a table with three columns: 'Action', 'Name', and 'Job Title'. The 'Name' column contains underlined text for each contact. Each row has a small icon with a red 'X' to its left. The contacts listed are:

Action	Name	Job Title
	<u>Brown, Joseph</u>	Purchasing Manager
	<u>Danens, David</u>	IT Manager
	<u>Ellis, Rob</u>	MIS
	<u>Kell, Joe</u>	President
	<u>Lawrentz, Andy</u>	IT Manager
	<u>MacDonald, Dan</u>	Operations Manager
	<u>Rasler, Brian</u>	Senior Project Manager
	<u>Rogers, Bob</u>	
	<u>Rosen, Mark</u>	President

In a module's home page, all of its records are listed.

✓ You can save this list to a PDF or Excel file for distribution and analysis by clicking the Print or Export button. See [Creating a Print or Export file](#).

Going to other modes from the list

Go to the other modes, or delete a record, by clicking its underlined name or clicking an icon, as shown below:

Viewing in View Mode

To view a contact in View mode, click its underlined name in the contact list.

 **Contact: Bob Rogers**

Account:	AAA Data Centers
Owner:	Smith, Bob
Job Title:	
Department:	
Type:	Analyst
Source:	Other
Entered:	Bob Smith 07/12/2004 8:44 PM
Modified:	Bob Smith 07/12/2004 8:44 PM
Last Touched:	Bob Smith 07/27/2004 6:36 PM
Description:	Bob creates specs for and consults on the

 **Address Information**

Work Address:	555 Everglade Terrace Miami, FL 31205 USA
Phone:	(801) 555-8000
Fax:	(801) 555-8001
E-Mail:	

 **Personal Information**

View mode displays related records in all modules.

✓ You can also view a contact by clicking any hyperlink to the contact that appears anywhere in SmartCompany. (Hyperlinks are underlined names that appear in the contact list, or in the view pages for contacts, projects, orders, and opportunities, or in reports.)

When you open a contact for viewing, you can see all aspects of the contact and its links to other modules, but you cannot make changes directly to the screen.

- To edit the contact, click the Edit button at the top right of the screen.
- To make additions to the listed areas below, click New in the area. (For example, to add a note, click New in the Notes summary.)
- Click Done when finished viewing, and you will be returned to the previous window.

Viewing, editing and deleting related records from other modules

In View mode all records related to the current one are displayed in summary form.

 **Participant In**

Action	Type	Name
	Opportunity	<u>HP Miami Data Center-Enclosures</u>
	Project	AAA Toledo Office Contract

 **Notes**

		Friday, July 30, 2004 1:36 PM - <u>Smith</u> Today by phone Bob agreed to find some time
---	---	--

In View mode, all related records are summarized.

You can access and alter these records directly from the View screen:

- To view a related record, click its underlined name.
- To edit a related record, click the Edit icon  beside its name.
- To delete a related record, click the delete icon  beside its name.

Viewing in Edit Mode

To access Edit mode from the other View modes:

- From List mode, click the Edit icon  beside the contact's name.
- From View mode, click the Edit button.

 **Edit Contact** (Items in **bold** are required)

Honorific:	Select One - v
First Name:	Bob
Last Name:	Rogers
Account:	AAA Data Centers 
Owner:	Smith, Bob v
Job Title:	
Department:	
Type:	Analyst v
Source:	Other v
Description:	Bob creates specs for and consults on the in

In Edit mode you can make changes to a record's details.

Use Edit mode to update the individual fields of a record. Related record summaries are not visible in this mode.

See also

[Understanding Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Creating a Contact

To create a new contact:

1. From your SmartCompany home page, click the New Contact link in the command bar.

The Edit Contact page appears.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Honorific - Select a title from the drop down list.

First Name - Enter the contact's first name.

Middle Name - Enter the contact's middle name.

Last Name - Enter the contact's surname (required).

Suffix - Enter the contact's suffix (Jr., Esq., and so on) if used.

Account - The account this contact is associated with. Enter the account name, or click the  icon to [search](#) for the account name.

Owner - The user in your organization who is responsible for this contact. The default owner is the user entering the contact, but you can choose any other user if you have privileges to do so.

Rating - The contact's importance to your organization. Your system administrator can change the contents of this menu. See Managing Contact Picklists for more information.

Type - The type of organization the contact represents. Your system administrator can change the contents of this menu. See Managing Contact Picklists for more information.

Source - The venue through which you met the contact (e.g., seminar, trade show). Your system administrator can change the contents of this menu. See Managing Contact Picklists for more information.

Description - Enter background information about the contact and their association with their company as well as your own.

Short Name - Enter a "nickname" to be used in SmartCompany to find this record quickly, with minimal text entry. For example, a contact named "Donald Schmowski" could be designated a short name "Don" and his records called up by invoking the short name.

Influence - The contact's influence in decisions affecting your company's products or services. Your system administrator can change the contents of this menu. See Managing Contact Picklists for more information.

Perception - Your perception of the contact's outlook on your company (neutral, positive, etc.). Your system administrator can change the contents of this menu. See Managing Contact Picklists for more information.

Active - By default a new contact is active on the system. Because all records are related in the database, you might prefer to deactivate an unused contact rather than delete it, to preserve its links with other records on the database.

Private - If activated, the record is accessible only to you, its owner.

Key Contact - Activate the check box if this person is the key contact -- in other words, the primary business associate -- for this account. Key contacts have a key symbol beside their name: 

E-mail Opt Out - Activate the check box if this person should be excluded from e-mails from your company to this account. Otherwise, they will automatically receive them.

Assistant Details - If applicable, add the contact's assistant contact information in the fields provided.

Locations - The primary address is copied from the account record. In this module you can add home address details as well. If they are the same as the primary address, click *copy primary address*.

 **An account can have multiple addresses and phone numbers:** Primary, Billing, Shipping, Home, and Other. The primary address is specified in the Account module. The Home address is specified in the Contacts module. Other addresses are specified in the New Opportunity module or the Orders module.

Personal Information - If applicable, enter the contact's personal information in these fields.

Categories - Choose one or more categories to which this contact should belong. Your system administrator can change the list of categories. See Managing Contact Picklists for more information.

3. When you are finished, click **Save** to save the new contact to the database.

 To save the current contact and create a new one right away, click Save and New.)

The contact information you have just entered will appear in View mode. Click Edit if revisions are necessary.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Editing a Contact

To make changes to a contact's details, you must have the required permissions, and you must be in Edit mode.

To edit a contact:

1. From the Contacts home page or the contact view screen, go into Edit mode:
 - *To edit a contact from the contact home page*, click the Edit icon  next to its name in the list.
 - *To edit a contact from the contact view screen*, click the Edit button at the top right of the window.

The contact record opens in Edit mode.

2. Make the changes you want to the contact by typing new information into the text boxes.
3. Click Save. The contact is updated on the database with the information you have just entered.

 **DISCARDING CHANGES AND DELETING CONTACTS:** You can discard changes before saving by returning to the previous screen. Click Delete to permanently delete the contact from the database. The delete button is not visible if you do not have delete privileges.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Deleting a Contact

To delete a contact, you must have the required permissions, and all records related to the contact must previously have been deleted.

To delete a contact:

1. From the Contacts home page, click the underlined name of the contact you want to delete. The contact record opens in View mode.
2. Scroll down the contact's listing and, in every module where records are displayed, click the Delete icon  to remove all records associated with this contact.
3. Click Done to return to the contact home page, where you will see the contact in the list.
4. Click the Delete icon  next to the name of the contact your want to remove permanently from the database.

 Alternatively, you can click either of the Delete buttons at the top and bottom right of the contact edit page.

After a confirmation query, the contact will be removed from the database.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

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[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Searching for Contacts

SmartCompany gives you two ways to locate a specific contact on the database.

- If you know all or part of the contact's name, middle name, account name, suffix or short name (*nickname*), use the basic Search function.
- If you need to search by some other element, use the SmartSearch function.

Using the basic Search function

To search for an contact using the Search function:

1. In the Contacts home page, type the name of the contact you want to find in the Search text box.

 **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation.

2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want to search the entire database instead of just the current module, activate the *entire site* option button.
4. (Optional) You can specify a date range for the search using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).

 If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.

5. Click the Search button.
6. If your search is successful, contacts that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

Using the advanced SmartSearch function

Use SmartSearch when your search involves several criteria. For example, in a search of contact records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

To carry out a SmartSearch:

1. In any module, click the SmartSearch wizard link:  [Wizard](#)
The SmartSearch window opens.
2. Review the search options and set search conditions using the minimum number of options.
3. From the *Return contacts* drop down list, specify whether you want the search to match All or Any of the search options.
4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only to you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) a record by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

See [this link](#) for more information about using SmartSearch.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Linking a Contact to an Account

Every [contact](#) must belong to an [account](#). An account can have an unlimited number of contacts, but a contact can be associated with only one account.

To link a contact to an account:

1. From the Accounts home page, click the underlined name of the account to which you want to add contacts. Its details appear in View mode.
2. Click the New Contact link in the command bar. The Edit Contact page appears.
3. Fill out the form, including as many details as you have available for this contact.
 **A NOTE ABOUT FORMS:** Your SmartCompany administrator specifies the fields and categories in the Setup module. If you are unsure of a field or category's content, ask your administrator.
4. Click Save. The contact record is saved to the database and associated with the account.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Quick Entry of a New Contact](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Categories to a Contact

Categories are general classifications under which contacts can be grouped. Contacts can then be summarized by category, and similarly, on-screen lists can be composed by category.

The SmartCompany administrator creates categories in the Setup module. Categories are assigned in the Contacts module when a contact is created, or at a later time in Edit mode.

New categories can be added in the Setup/Lists module, then applied to contacts. Follow the procedure below to assign existing categories to an existing contact.

To assign categories to a contact:

1. From the Accounts home page, click the Edit icon  beside the name of the contact you want to access. The contact opens in Edit mode.
2. Scroll down to the Categories list near the bottom of the window. Currently assigned categories have their check boxes activated.



In this example, the Chamber Mixer, E-mail Blast 6/04, and Mailing List categories are active.

3. Activate the check boxes of categories you want to apply to this contact.
4. Click Save. The contact is updated.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Quick Entry of a New Contact](#)

[Creating a Print or Export File](#)

Adding Notes

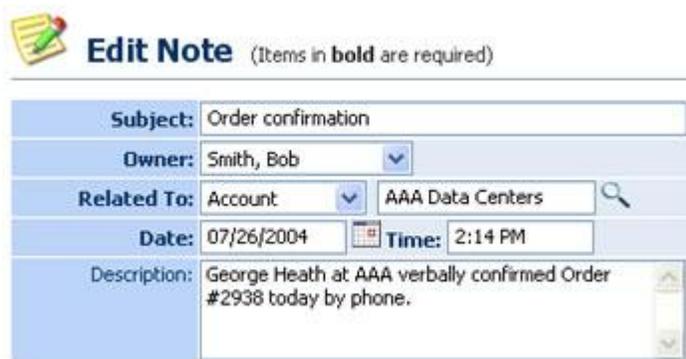
Notes are written comments and observations that can be composed while talking to a contact on the phone or catching up on e-mail. Notes can be written by any user with access to a module that supports notes: Accounts, Contacts, Projects, Opportunities, and Orders.

The writer of a note -- its "owner" -- is listed with the note itself in case internal discussion is warranted.

Notes about an account can be reviewed whenever a module is in [view](#) mode.

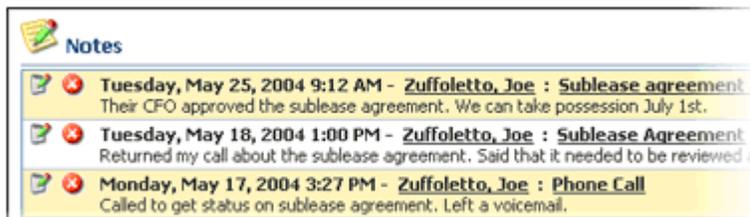
To add a note:

1. From the module's home page, click the underlined name of the record you want to annotate. The module opens in View mode.
2. Scroll down to the Notes section and click New. The Edit Note window opens.



Subject:	Order confirmation
Owner:	Smith, Bob
Related To:	Account AAA Data Centers
Date:	07/26/2004
Time:	2:14 PM
Description:	George Heath at AAA verbally confirmed Order #2938 today by phone.

3. Fill in the text boxes as required, and enter your note in the Description area.
 - ✔ Use the [Calendar](#) feature to set the date, or just type it into the Date text box.
4. Click Save. The note is added to the summary information of the module in the Notes section.



Editing Notes

To delete a note, click the Edit icon  beside the note's name, as shown above.

Deleting Notes

To delete a note, click the Delete icon  beside the note's name, as shown above.

See also

[Adding Documents](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Documents

Use this feature to attach documents to a record that are specific for only that record: invoices, purchase orders, quotes, contracts, and so on. If a document is general in nature and intended for viewing by all users, add it to the [document library](#) instead.

Documents can be attached to an account of the following type: account, contact, project, opportunity, and order by going to that account's Document section and clicking New.

In addition, they can be attached to the following record types: purchase orders, invoices, quotes or bids.

The procedure below describes how to add a document to a record. Further down, procedures describe how to edit and delete documents already attached to the record, and how to access them.

Adding Documents to a Record

To add a document to a record:

1. From any open record, scroll to the bottom of the window to the Document area and click New.

The New Document window opens.

Name:		<input type="text"/>
Select File:		<input type="text"/>
Document Type:		- Select One -
Related To:		Account Bob's Auto
Owner:		Smith, Bob
Description:		<input type="text"/>

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - Since you are attaching the document to a record, this area is already filled in. Do not make changes to it.

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

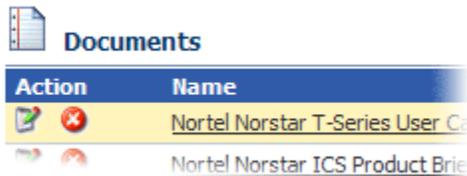
3. When you are finished, click **Save** to attach the new document to the record.

Editing and Deleting Attached Documents

To edit or delete a document that is attached to a record:

1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document for editing or deletion.
 - **To edit a document's description**, click the edit icon beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - **To delete a document**, click the delete icon beside its name. Confirm the deletion, and the document is removed from the database.

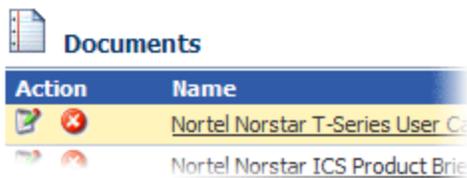
Accessing Documents Attached to Records

To access a document attached to a record, you must first open the record.

To open a document that is attached to a record:

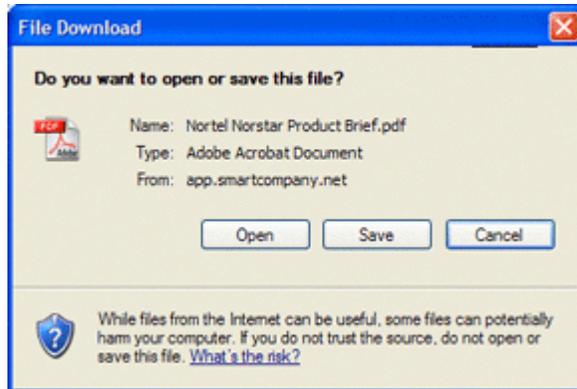
1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The file opens for your review.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Tasks and Events

By incorporating [tasks](#) and [events](#) into a module, you can see a summary of all tasks and events related to that module when it is open in [view](#) mode. You can incorporate tasks and events into the following modules: Accounts, Contacts, Projects, Opportunities, and Orders.

NOTE: Before you can link tasks and events to an account, they must already exist on the database.

To add a tasks and events to a module:

1. From the module's home page, click the underlined name of the record to which you want to add tasks and events. The module opens in View mode.
2. Scroll down to the Tasks and Events section and click New Task or New Event. The Edit Task or Edit Event window opens.
3. Fill in the task/event window as required. For details, see [Working with Tasks](#) and [Working with Events](#).
4. Click Save. The task/event window changes to View mode. Click Done to complete the addition.

The task or event is added to the module's summary information. Repeat this process to add more tasks and/or events.

See also

[Adding Notes](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Transferring Ownership

Every record (e.g., account, contact, project, etc.) has an *owner*: the person responsible for that record.

When the record is created, its ownership is assigned by default to the person logged in during its creation.

Ownership of a record can be transferred at any time by a user with the necessary privileges.

To assign a record's ownership to another user:

1. From the home page of the module where the record is stored, click the Edit icon  beside the name of the record whose ownership you want to transfer. The record opens in Edit mode.
2. From the Owner drop down list, select the name of the user to whom you want to transfer ownership of the record.
3. Click Save. The record appears in View mode with the new owner assigned.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

Quick Entry of a New Contact

Use this feature to add a new contact quickly -- for instance, when you're talking on the phone to a prospective customer.

To use Quick Entry:

1. Click the Contacts tab to go to the Contacts module.
2. In the Quick Entry section at the bottom left of the Contacts window, enter the contact's name, phone number and Web address -- or as much information as you have.
3. From the Owner drop down list, select the employee in your company who will be responsible for this contact. Because you are currently logged in, you are listed by default as the owner of the contact.
4. Click Save.

The new contact is saved to the database and appears on the contact list.

When you have the time and information, [edit this contact](#) to include the additional details required.

See also

[Understanding Contacts](#)

[Viewing Contacts](#)

[Creating a Contact](#)

[Editing a Contact](#)

[Deleting a Contact](#)

[Searching for Contacts](#)

[Linking a Contact to an Account](#)

[Assigning Categories to a Contact](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Creating a Print or Export File

You can save your active module's summary list in PDF (Portable Document Format) or XLS (Excel) format for distribution and analysis by clicking the Print or Export button. For example, from the Accounts module home page, you could create an Acrobat-readable or Excel-format file of your list of accounts.

To create a print or export file:

1. Go to the home page of the module whose master list you want to print. (For example, to print a list of contacts, click the Contacts tab.)
2. Click the button that corresponds to the type of file you want to create.
 - *To create an Excel-compatible (XLS) file, click the Export button.*
 - *To create an Acrobat-compatible (PDF) file, click the Print button.*
3. Follow the file save instructions provided by your browser, and select a folder to store the file.

See also

[Importing Contacts](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

Projects Module

Understanding Projects

Projects provide a way to combine records related to opportunities and orders with other SmartCompany resources -- informational and human -- that are involved in the completion of major sales.

Projects are especially useful for keeping track of the activities of multiple company personnel in large, complex sales operations. Multiple salespeople and/or product lines are often involved, and organizing people and their related activities into projects can facilitate effective team selling.

A project generally starts out as a collection of one or more *opportunities* (potential sales that haven't closed yet). Over time, some opportunities might convert into closed orders, and others might not. By storing related opportunities and orders in a project, you gain the ability to see your closing ratios at a macro level.

Linking Projects with Other Modules

Once you have created a project, you can attach any number of notes, tasks, and events to it. This allows you to keep a running history of your project. You can see records from other modules related to a project by examining that project's record in View mode. You will also see anticipated revenues from the project.

You can also assign custom *categories* to your projects and search on those categories later. This feature is especially useful for tracking marketing campaigns, mailing lists, leads from trade shows, and so on.

See also

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

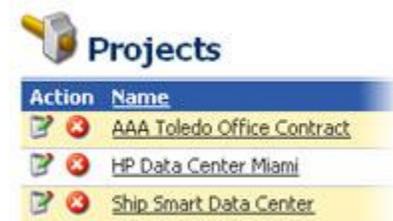
Viewing Projects

Projects and all other records have three viewing modes:

- **List Mode** - A list of projects that appears when you go to the Projects home page. Use this to export files or to individual records.
- **View Mode** - Read-only display of project details and all related records. Use this view to get the "big picture" of the project, in relation to all your business activities.
- **Edit Mode** - An editable display of project details. Use this to make changes to a project.

Viewing in List Mode

In the Projects home page, all projects are listed in the main window. You can resort the list by clicking an underlined column head.



In a module's home page, all of its records are listed.

✓ If you have sufficient privileges, you can save this list to a PDF or Excel file for distribution and analysis by clicking the Print or Export button. See [Creating a Print or Export file](#).

Going to other modes from the list

Go to the other modes, or delete a record, by clicking its underlined name or clicking an icon:

Viewing in View Mode

To view a project in View mode, click its underlined name in the project list.

 **Project: AAA Toledo Office Contract**

Owner:	Smith, Bob
Account:	AAA Data Centers
Entered:	Bob Smith 07/27/2004 6:03 PM
Last Touched:	Bob Smith 07/27/2004 6:36 PM
Description:	We have an opportunity to outfit AAA's new 1 coordinate on the new insulators, which are e

 **Notes**

There are no notes to display.

 **Participants**

Action	Type	Name
 	Project	AAA Toledo Office Contract

✓ You can also view a project by clicking any hyperlink to the project that appears anywhere in SmartCompany. (Hyperlinks are underlined names that appear in the project list, or in the view pages for projects, projects, orders, and opportunities, or in reports.)

When you open a project for viewing, you can see all aspects of the project and its links to other modules, but you cannot make changes directly to the screen.

- To *edit the project*, click the Edit button at the top right of the screen.
- To *make additions to the listed areas* below, click New in the area. (For example, to add a note, click New in the Notes summary.)
- *Click Done when finished viewing*, and you will be returned to the previous window.

Viewing, editing and deleting related records from other modules

In View mode all records related to the current one are displayed in summary form.

 **Contacts**

Action	Name	Job Title
 	<u>Brown, Joseph</u> 	Purchasing Manager
 	<u>Rogers, Bob</u>	

 **Participant In**

Action	Type	Name
 	Project	HP Data Center Miami

In View mode, all related records are summarized.

You can access and alter these records directly from the View screen:

- *To view a related record*, click its underlined name.
- *To edit a related record*, click the Edit icon  beside its name.
- *To delete a related record*, click the delete icon  beside its name.

Viewing in Edit Mode

To access Edit mode from the other View modes:

- *From List mode*, click the Edit icon  beside the project's name.
- *From View mode*, click the Edit button.



Edit Project (Items in **bold** are required)

Name:	AAA Toledo Office Contract
Owner:	Smith, Bob
Account:	AAA Data Centers
Description:	We have an opportunity to outfit AAA's new Toledo coordinate on the new insulators, which are a st

In Edit mode you can make changes to a record's details.

Use Edit mode to update the individual fields of a record. Related record summaries are not visible in this mode.

See also

[Understanding Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Creating a Project

To create a new project:

1. From your SmartCompany home page, click the New Project link in the command bar.

The Edit Project page appears.

Edit Project (Items in bold are required)

Name:	AAA Toledo Office Contract	Start Date:	07/27/2004
Owner:	Smith, Bob	Active:	<input checked="" type="checkbox"/>
Account:	AAA Data Centers		
Description:	We have an opportunity to outfit AAA's new Toledo office. Sales and Engineering will coordinate on the new insulators, which are a strong selling point for AAA.		

Give your project a name that will help your colleagues categorize it easily.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Assign a name to the project that describes its nature and the account involved.

Owner - The user in your organization who is responsible for this project. The default owner is the user entering the project, but you can choose any other user if you have privileges to do so.

Account- The account this project is associated with. Enter the account name, or click the  icon to [search](#) for the account name.

Description - Enter background information about the project.

Start Date- Type the date directly into the text box, or use the Calendar  to specify a start date for the project.

Active - By default a new project is active on the system. Because all records are related in the database, you might prefer to deactivate an unused project rather than delete it, to preserve its links with other records on the database.

3. When you are finished, click **Save** to save the new project to the database.

 To save the current contact and create a new one right away, click Save and New.)

The project information you have just entered will appear in View mode. Click Edit if revisions are necessary.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Editing a Project

To make changes to an project's details, you must have the required permissions, and you must be in Edit mode.

To edit an project:

1. From the Project home page or the project view screen, go into Edit mode:
 - *To edit a project from the project home page*, click the Edit icon  next to its name in the list.
 - *To edit a project ROM the project view screen*, click the Edit button at the top right of the window.

The project record opens in Edit mode.

2. Make the changes you want to the project by typing new information into the text boxes.
3. Click Save. The project is updated on the database with the information you have just entered.

 **DISCARDING CHANGES AND DELETING PROJECTS:** You can discard changes before saving by returning to the previous screen. Click Delete to permanently delete the project from the database. The delete button is not visible if you do not have delete privileges.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Deleting a Project

To delete an project, you must have the required permissions, and all records related to the project must previously have been deleted.

To delete an project:

1. From the Projects home page, click the underlined name of the project you want to delete. The project record opens in View mode.
2. Scroll down the project's listing and, in every module where records are displayed, click the Delete icon  to remove all records associated with this project.
3. Click Done to return to the project home page, where you will see the project in the list.
4. Click the Delete icon  next to the name of the project your want to remove permanently from the database.

TIP: Alternatively, you can click either of the **Delete** buttons at the top and bottom right of the project edit page.

After a confirmation query, the project will be removed from the database.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Searching for Projects

SmartCompany gives you two ways to locate a specific project on the database.

- *If you know the project's name, use the basic Search function.*
- *If you need to search by something other than name, use the SmartSearch function.*

Using the basic Search function

To search for an project using the Search function:

1. In the Projects home page, type the name of the project you want to find in the Search text box.
 - ✓ **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation.
2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want to search the entire database instead of just the current module, activate the *entire site* option button.
4. (Optional) You can specify a date range for the search using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).
 - ✓ If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.
5. Click the Search button.
6. If your search is successful, projects that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

Using the advanced SmartSearch function

Use SmartSearch when your search involves several criteria. For example, in a search of project records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

To carry out a SmartSearch:

1. In any module, click the SmartSearch wizard link:  [Wizard](#)
The SmartSearch window opens.
2. Review the search options and set search conditions using the minimum number of options.
3. From the *Return projects* drop down list, specify whether you want the search to match All or Any of the search options.
4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only to you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) a record by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

See [this link](#) for more information about using SmartSearch.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Participants to a Project

Participants are [contacts](#) (people) or [accounts](#) (organizations) that are involved with your project.

To add participants to a project:

1. From the Projects home page, click the underlined name of the project to which you want to add participants. The project opens in View mode.
2. Scroll down to the Participants section and click New. The Edit Participants window opens.

Edit Project Participant (Items in bold)

Project: **AAA Toledo Office Contract**

Related To: Contact 🔍

Role: Contractor

Description

Bob is the main plumbing contractor for our midwestern operations.

Participants can be either contacts or accounts.

3. Fill in the text boxes:
 - Name** - Assign a name to the project that describes its nature and the account involved.
 - Related To** - From the drop down list select Account or Contact, and then enter the name in the text box to the right. If you can't remember the exact name, click the 🔍 icon to [search](#) for the account or contact name.
 - Role** - Select the role this participant will play in the project.
 - Description** - Enter a description of the participant's activities and role in the project.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The participant is added to the project's summary information. Repeat this process to add additional participants.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Opportunities to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Opportunities to a Project

Opportunities represent potential sales that haven't closed yet. Opportunities can be created in the Opportunities module, or on the fly from the Accounts and Project modules.

To add opportunities to a project:

1. From the Projects home page, click the underlined name of the project to which you want to add opportunities. The project opens in View mode.
2. Scroll down to the Opportunities section and click New. The Edit Opportunities window opens.
3. Fill in the text boxes. See [Creating an opportunity](#) for details.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The opportunity is added to the project's summary information. Repeat this process to add additional opportunities.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Orders to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Orders to a Project

Orders represent closed sales and are the basis for post-sales customer support, commission tracking, payment tracking, and job costing in SmartCompany.

To add orders to a project:

1. From the Projects home page, click the underlined name of the project to which you want to add orders. The project opens in View mode.
2. Scroll down to the Orders section and click New. The Edit orders window opens.
3. Fill in the text boxes. See [Creating an Order](#) for details.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The order is added to the project's summary information. Repeat this process to add additional orders.

See also

[Understanding Projects](#)

[Viewing Projects](#)

[Creating a Project](#)

[Editing a Project](#)

[Deleting a Project](#)

[Searching for Projects](#)

[Adding Notes](#)

[Assigning Participants to a Project](#)

[Assigning Opportunities to a Project](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Adding Notes

Notes are written comments and observations that can be composed while talking to a contact on the phone or catching up on e-mail. Notes can be written by any user with access to a module that supports notes: Accounts, Contacts, Projects, Opportunities, and Orders.

The writer of a note -- its "owner" -- is listed with the note itself in case internal discussion is warranted.

Notes about an account can be reviewed whenever a module is in [view](#) mode.

To add a note:

1. From the module's home page, click the underlined name of the record you want to annotate. The module opens in View mode.
2. Scroll down to the Notes section and click New. The Edit Note window opens.

Edit Note (Items in **bold** are required)

Subject:	Order confirmation
Owner:	Smith, Bob
Related To:	Account AAA Data Centers
Date:	07/26/2004
Time:	2:14 PM
Description:	George Heath at AAA verbally confirmed Order #2938 today by phone.

3. Fill in the text boxes as required, and enter your note in the Description area.
 - ✓ Use the [Calendar](#) feature to set the date, or just type it into the Date text box.
4. Click Save. The note is added to the summary information of the module in the Notes section.

Notes

- Tuesday, May 25, 2004 9:12 AM - **Zuffoletto, Joe** : **Sublease agreement**
Their CFO approved the sublease agreement. We can take possession July 1st.
- Tuesday, May 18, 2004 1:00 PM - **Zuffoletto, Joe** : **Sublease Agreement**
Returned my call about the sublease agreement. Said that it needed to be reviewed.
- Monday, May 17, 2004 3:27 PM - **Zuffoletto, Joe** : **Phone Call**
Called to get status on sublease agreement. Left a voicemail.

Editing Notes

To delete a note, click the Edit icon  beside the note's name, as shown above.

Deleting Notes

To delete a note, click the Delete icon  beside the note's name, as shown above.

See also

[Adding Documents](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Documents

Use this feature to attach documents to a record that are specific for only that record: invoices, purchase orders, quotes, contracts, and so on. If a document is general in nature and intended for viewing by all users, add it to the [document library](#) instead.

Documents can be attached to an account of the following type: account, contact, project, opportunity, and order by going to that account's Document section and clicking New.

In addition, they can be attached to the following record types: purchase orders, invoices, quotes or bids.

The procedure below describes how to add a document to a record. Further down, procedures describe how to edit and delete documents already attached to the record, and how to access them.

Adding Documents to a Record

To add a document to a record:

1. From any open record, scroll to the bottom of the window to the Document area and click New.

The New Document window opens.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - Since you are attaching the document to a record, this area is already filled in. Do not make changes to it.

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

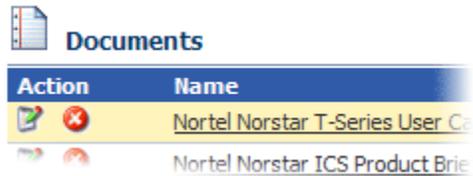
3. When you are finished, click **Save** to attach the new document to the record.

Editing and Deleting Attached Documents

To edit or delete a document that is attached to a record:

1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document for editing or deletion.
 - **To edit a document's description**, click the edit icon  beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - **To delete a document**, click the delete icon  beside its name. Confirm the deletion, and the document is removed from the database.

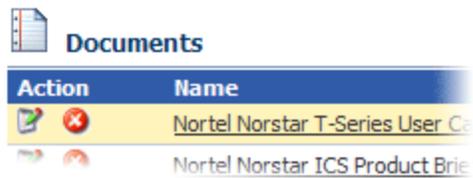
Accessing Documents Attached to Records

To access a document attached to a record, you must first open the record.

To open a document that is attached to a record:

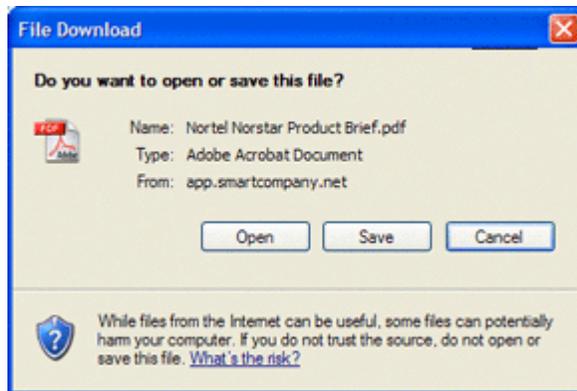
1. From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



2. Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The file opens for your review.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Tasks and Events

By incorporating [tasks](#) and [events](#) into a module, you can see a summary of all tasks and events related to that module when it is open in [view](#) mode. You can incorporate tasks and events into the following modules: Accounts, Contacts, Projects, Opportunities, and Orders.

NOTE: Before you can link tasks and events to an account, they must already exist on the database.

To add a tasks and events to a module:

1. From the module's home page, click the underlined name of the record to which you want to add tasks and events. The module opens in View mode.
2. Scroll down to the Tasks and Events section and click New Task or New Event. The Edit Task or Edit Event window opens.
3. Fill in the task/event window as required. For details, see [Working with Tasks](#) and [Working with Events](#).
4. Click Save. The task/event window changes to View mode. Click Done to complete the addition.

The task or event is added to the module's summary information. Repeat this process to add more tasks and/or events.

See also

[Adding Notes](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Transferring Ownership

Every record (e.g., account, contact, project, etc.) has an *owner*: the person responsible for that record.

When the record is created, its ownership is assigned by default to the person logged in during its creation.

Ownership of a record can be transferred at any time by a user with the necessary privileges.

To assign a record's ownership to another user:

1. From the home page of the module where the record is stored, click the Edit icon  beside the name of the record whose ownership you want to transfer. The record opens in Edit mode.
2. From the Owner drop down list, select the name of the user to whom you want to transfer ownership of the record.
3. Click Save. The record appears in View mode with the new owner assigned.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

Creating a Print or Export File

You can save your active module's summary list in PDF (Portable Document Format) or XLS (Excel) format for distribution and analysis by clicking the Print or Export button. For example, from the Accounts module home page, you could create an Acrobat-readable or Excel-format file of your list of accounts.

To create a print or export file:

1. Go to the home page of the module whose master list you want to print. (For example, to print a list of contacts, click the Contacts tab.)
2. Click the button that corresponds to the type of file you want to create.
 - *To create an Excel-compatible (XLS) file, click the Export button.*
 - *To create an Acrobat-compatible (PDF) file, click the Print button.*
3. Follow the file save instructions provided by your browser, and select a folder to store the file.

See also

[Importing Contacts](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

Opportunities Module

Understanding Opportunities

Opportunities represent potential sales that have not yet closed. Opportunities are the basis for sales forecasting and sales pipeline management in SmartCompany. By creating opportunity records, SmartCompany users can keep everyone in the sales process informed of progress of the sales effort, and up to date on anticipated revenues.

Opportunity summaries are included in View mode for records in the Accounts and Projects modules.

- *Viewing the opportunity summary in an account record* gives you a snapshot of pending business with that client.
- *Viewing the opportunity summary in a project record* gives you a summary of the anticipated revenues, and overall status in the sales cycle, of one aspect of a large-scale project.

Rating Opportunities by Status and Probability of Success

Every opportunity record has a *status* that tells where in the sales cycle that opportunity is located.

An opportunity status can have one of three *status types*:

1. **Open**, meaning the opportunity is still pending
2. **Closed - Won**, meaning the opportunity turned into an order
3. **Closed - Lost**, meaning the opportunity was lost for whatever reason

TIP: In the Setup module, your SmartCompany administrator can configure a precise set of opportunity statuses that fit your unique sales process. Additionally, each status can be associated with a probability percentage that represents the default likelihood of closing an opportunity with that status.

Weighting revenue forecasts using the Probability field

When you create an opportunity record, you will enter a percentage estimate of success (Probability field) in closing the sale. A default value is automatically set every time you choose an opportunity status; you can override the default by typing over it. This percentage is used to generate weighted revenue forecasts on-screen and in opportunity reports.

The Opportunities module also enables you to [assign participants](#) (colleagues from your organization) to an opportunity, and add [line items](#) that can be factored into revenue forecasts.

Expected Sell Price

An opportunity's expected sell price is the amount of revenue the sales representative believes the opportunity represents. This figure is multiplied by the probability to generate a weighted

forecast price. Additionally, the sales representative can track when the opportunity opened, when it is expected to close, and when it actually closes.

Expected Sell Price	Prob%	Forecast Price
\$20,000.00	30%	\$6,000.00
\$8,800.00	30%	\$2,640.00
\$10,000.00	50%	\$5,000.00
\$38,800.00		\$13,640.00

This portion of an opportunity summary shows how revenues are estimated for a selected account or project.

See also

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Viewing Opportunities

Opportunities and all other records have three viewing modes:

- **List Mode** - A list of opportunities that appears when you go to the Opportunities home page. Use this to export files or to individual records.
- **View Mode** - Read-only display of opportunity details and all related records. Use this view to get the "big picture" of the opportunity, in relation to all your business activities.
- **Edit Mode** - An editable display of opportunity details. Use this to make changes to an opportunity.

Viewing in List Mode

In the Opportunities home page, all opportunities are listed in the main window.



The screenshot shows the 'Opportunities' module interface. At the top left is a funnel icon. Below it is a table with three columns: 'Action', 'Name', and 'Owner'. Each row in the table has a small icon with a red 'X' in the 'Action' column and an underlined name in the 'Name' column. The 'Owner' column lists the responsible person for each opportunity.

Action	Name	Owner
 	<u>Elephant Bar UPS</u>	Moneymaker, Chris
 	<u>EXP Site Monitoring</u>	Moneymaker, Chris
 	<u>HP Data Center Miami Air</u>	Smith, Bob
 	<u>HP Data Center Site Monitoring</u>	Moneymaker, Chris
 	<u>HP Data Center UPS</u>	Harrington, Al
 	<u>Kell Networking Enclosure</u>	Smith, Bob

In a module's home page, all of its records are listed.

 You can save this list to a PDF or Excel file for distribution and analysis by clicking the Print or Export button. See [Creating a Print or Export file](#).

Going to other modes from the list

Go to the other modes, or delete a record, by clicking its underlined name or clicking an icon:

Viewing in View Mode

To view an opportunity in View mode, click its underlined name in the opportunity list.



Opportunity: Elephant Bar UPS

Project:		Refer
Account:	<u>Elephant Bar Restaurant</u>	
Owner:	Moneymaker, Chris	Expect
Business Category:	Products & Services	
Business Type:	3UPS (30)	Pe
Status:	Negotiation/Review	Expect
Lead Source:		Actu
Entered:	Bob Smith 07/13/2004 10:57 AM	
Last Touched:	Bob Smith 07/13/2004 10:58 AM	
Description:	Ebar needs a battery back up for pos network and	
Next Steps:	Waiting for sign off	

Every opportunity has an owner and is linked to an account.

TIP: You can also view an opportunity by clicking any hyperlink to the opportunity that appears anywhere in SmartCompany. (Hyperlinks are underlined names that appear in the opportunity list, or in the view pages for opportunities, opportunities, orders, and opportunities, or in reports.)

When you open an opportunity for viewing, you can see all aspects of the opportunity and its links to other modules, but you cannot make changes directly to the screen.

- To *edit* the opportunity, click the Edit button at the top right of the screen.
- To *make additions to the listed areas* below, click New in the area. (For example, to add a note, click New in the Notes summary.)
- *Click Done when finished viewing*, and you will be returned to the previous window.

Viewing, editing and deleting related records from other modules

In View mode all records related to the current one are displayed in summary form.



Contacts

Action	Name	Job Title
	<u>Brown, Joseph</u>	Purchasing Manager
	<u>Rogers, Bob</u>	

Participant In

Action	Type	Name
	Project	HP Data Center Miami

In View mode, all related records are summarized.

You can access and alter these records directly from the View screen:

- To view a related record, click its underlined name.
- To edit a related record, click the Edit icon  beside its name.
- To delete a related record, click the delete icon  beside its name.

Viewing in Edit Mode

To access Edit mode from the other View modes:

- From List mode, click the Edit icon  beside the opportunity's name.
- From View mode, click the Edit button.



In Edit mode you can make changes to a record's details.

Use Edit mode to update the individual fields of a record. Related record summaries are not visible in this mode.

See also

[Understanding Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

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[Creating a Print or Export File](#)

Creating an Opportunity

Opportunities, when realized, can be turned into orders with all their details intact.

✔ **Creating opportunities based on existing accounts:** You can create an opportunity independent of existing accounts by following the procedure below. To create an opportunity that involves an existing account on your database, open that account and scroll to the Opportunities area, then click New.

To create a new opportunity:

1. From your SmartCompany home page, click the New Opportunity link in the command bar.

The Edit Opportunity page appears.

Edit Opportunity (Items in bold are required)	
Name:	Elephant Bar UPS
Project:	<input type="text"/>
Account:	Elephant Bar Restaurant
Owner:	MoneyMaker, Chris
Business Category:	Products & Services
Business Type:	3UPS (30)
Status:	Negotiation/Review
Lead Source:	- Select One -
Description:	Ebar needs a battery back up for pos network and con...

Give your opportunity a name that will help your colleagues categorize it easily.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Assign a name to the opportunity that describes its nature and the account involved.

Project - If the opportunity is to be linked with a project, enter the project name, or click the icon to [search](#) for the project name.

Account - The account this opportunity is associated with. Enter the account name, or click the icon to [search](#) for the account name.

Owner - The user in your organization who is responsible for this opportunity. The default owner is the user entering the opportunity, but you can choose any other user if you have privileges to do so.

Business Category - Assign a business category to the opportunity from the drop down list.

Business Type - Assign a business type to the opportunity from the drop down list.

Status - Assign a status (an indicator of the current position in the sales cycle) to the opportunity from the drop down list.

Lead Source - Assign the origin of the opportunity (e.g., sales seminar) from the drop down list.

Description - Enter background information about the opportunity.

Next Steps - Enter a brief description the anticipated next stage in the sales cycle.

Open Date - The date the opportunity arose. Use the Calendar  to specify the date.

Expected Sell Price - Enter an estimate of the anticipated value of the sale.

Probability - Enter the likelihood of a successful outcome. (Type *Excellent, Good, Fair* or similar.)

Reference Number - Automatically generated from your settings in [Organization Rules](#). The number cannot be altered here.

Probability - Enter the probability of success (in percentage). This number is used for forecasting.

Expected Close Date - Type the date directly into the text box, or use the Calendar  to specify the date this opportunity is expected to be converted to an order.

Actual Close Date - Use the Calendar  to specify the date this opportunity closed.

External Reference Number - Enter the prospective client's FRQ or other externally generated tracking number.

Locations - The primary address is copied from the account record. In this module you can add Billing, Shipping, and Other address details as well. If they are the same as the primary address, click *copy primary address*.

 **An account can have multiple addresses and phone numbers:** Primary, Billing, Shipping, Home, and Other. The primary address is specified in the Account module. The Home address is specified in the Contacts module. Other addresses are specified in the New Opportunity module or the Orders module.

3. When you are finished, click **Save** to save the new opportunity to the database. (TIP: To save the current opportunity and create a new one right away, click Save and New.)

The opportunity information you have just entered will appear in View mode. Click Edit if revisions are necessary.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Editing an Opportunity

To make changes to an opportunity's details, you must have the required permissions, and you must be in Edit mode.

To edit an opportunity:

1. From the Opportunities home page or the Opportunity view screen, go into Edit mode:
 - *To edit a opportunity from the opportunity home page*, click the Edit icon  next to its name in the list.
 - *To edit a opportunity from Opportunity View mode*, click the Edit button at the top right of the window.

The opportunity record opens in Edit mode.

2. Make the changes you want to the opportunity by typing new information into the text boxes.
3. Click Save. The opportunity is updated on the database with the information you have just entered.

 **DISCARDING CHANGES AND DELETING OPPORTUNITIES:** You can discard changes before saving by returning to the previous screen. Click Delete to permanently delete the opportunity from the database. The delete button is not visible if you do not have delete privileges.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

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Converting an Opportunity to an Order

If an opportunity is closed and won, you can convert it from an opportunity record to an order record with the click of a button. The entire contents of the opportunity, including line items and history, are copied to a new order record, and the opportunity record is retained on the database and automatically set to the Closed - Won status with a probability of 100%.

To convert an opportunity into an order, you must have the required permissions, and you must be in Edit mode.

To convert an opportunity into an order:

1. From the Opportunities home page or the Opportunity view screen, go into Edit mode:
 - *To edit a opportunity from the opportunity home page*, click the Edit icon  next to its name in the list.
 - *To edit a opportunity from Opportunity View mode*, click the Edit button at the top right of the window.

The opportunity record opens in Edit mode.

2. Click the Convert to Order button. You will be asked to confirm this action.
3. Click yes to confirm. An order record is created and the opportunity record is set to the Closed - Won status. For auditing purposes, the order record contains a link back to the opportunity that you can access when viewing the order.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Editing an Opportunity](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Deleting an Opportunity

To delete an opportunity, you must have the required permissions, and all records related to the opportunity must previously have been deleted.

To delete an opportunity:

1. From the Opportunities home page, click the underlined name of the opportunity you want to delete. The opportunity record opens in View mode.
2. Scroll down the opportunity's listing and, in every module where records are displayed, click the Delete icon  to remove all records associated with this opportunity.
3. Click Done to return to the opportunity home page, where you will see the opportunity in the list.
4. Click the Delete icon  next to the name of the opportunity your want to remove permanently from the database.

 Alternatively, you can click either of the Delete buttons at the top and bottom right of the opportunity edit page.

After a confirmation query, the opportunity record will be removed from the database.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Searching for Opportunities](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Searching for Opportunities

SmartCompany gives you two ways to locate a specific opportunity on the database.

- *If you know all or part of the opportunity's name, or the account or participant name, use the basic Search function.*
- *If you need to search by something other than name, use the SmartSearch function.*

Using the basic Search function

To search for an opportunity using the Search function:

1. In the Opportunities home page, type the name of the opportunity you want to find in the Search text box.
 - ✓ **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation.
2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want to search the entire database instead of just the current module, activate the *entire site* option button.
4. (Optional) You can specify a date range for the search using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).
 - ✓ If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.
5. Click the Search button.
6. If your search is successful, opportunities that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

Using the advanced SmartSearch function

Use SmartSearch when your search involves several criteria. For example, in a search of opportunity records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

To carry out a SmartSearch:

1. In any module, click the SmartSearch wizard link:  [Wizard](#)
The SmartSearch window opens.
2. Review the search options and set search conditions using the minimum number of options.
3. From the *Return opportunities* drop down list, specify whether you want the search to match All or Any of the search options.
4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only to you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) a record by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

See [this link](#) for more information about using SmartSearch.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Assigning Participants to an Opportunity](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Participants to an Opportunity

Participants are [contacts](#) (people) or [accounts](#) (organizations) that are involved with your opportunity. An opportunity can have any number of participants.

To add participants to an opportunity:

1. From the Opportunities home page, click the underlined name of the opportunity to which you want to add participants. The opportunity opens in View mode.
2. Scroll down to the Participants section and click New. The Edit Opportunity Participants window opens.

Opportunity:	Elephant Bar UPS
Participant:	Contact <input type="text" value="Rasler, Brian"/>
Role:	Manager
Description:	Brian is responsible for all purchases of electrical equipment. He recommended our new insulator for their installation.

Participants can be either contacts or accounts.

3. Fill in the text boxes:
 - Name** - Assign a name to the opportunity that describes its nature and the account involved.
 - Participant** - From the drop down list select Account or Contact, and then enter the name in the text box to the right. If you can't remember the exact name, click the  icon to [search](#) for the account or contact name.
 - Role** - Select the role this participant will play in the opportunity.
 - Description** - Enter a description of the participant's activities and role in the opportunity.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The participant is added to the opportunity's summary information. Repeat this process to add additional participants.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

[Adding Line Items to an Opportunity](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Adding Line Items to an Opportunity

If your company subscribes to SmartCompany's Price Book, your administrator has set up line items for quick reference to products and services offered by your company.

In the Opportunities and Orders modules, you use line items to forecast and record sales:

- *In the Opportunities module*, tracking line items gives you the ability to run sales forecasts broken down by product and product line.
- *In the Orders module*, tracking line items lets you view sales totals at the product level.

To add line items to an opportunity record:

1. From the Opportunities home page, click the underlined name of the opportunity to which you want to add line items. The opportunity opens in View mode.
2. Scroll down to the Line Items section and click New. The Edit Line Items window opens.

Opportunity:	Elephant Bar UPS	
Product:	PowerSure PST - 60Hz	
Vendor:	Liebert	
Product Line:	1UPS (60)	
Description:	Single Phase UPS	
Model Number:	EU5Y-39282	
SKU:	AMC-22UU37	
Quantity:	150	
Unit of Measure:	1	
Unit Cost:	2.54	Total Cost: 38
List Price:	4.00	Total List Price: 60
Expected Sell Price:	3.45	Total Expected Sell Price: 51

The cost details entered here will be factored into revenue forecasts.

3. Fill in the text boxes:

Opportunity - This is a read-only link to the detailed listing for the opportunity.

Product - Enter the name of the product this opportunity is based on, or click the  icon to [search](#) for the project name.

Vendor - Read-only, based on the records you created in the Vendors and Products area of Setup.

Product Line - From the drop down list, select the product line.

Description - Enter a brief description of the product.

Model Number - Enter the product's model number, if applicable.

SKU - Enter the product's Stock Keeping Unit number, if applicable.

Quantity - Enter the quantity of products you hope to sell via this opportunity.

Unit Measure - Enter the unit of measurement (feet, pounds, etc.) if applicable. If sold as single units enter "ea." (for "each").

Unit Cost - Enter the wholesale or manufacturing cost per unit.

List Price - Enter the product's advertised unit list price.

Expected Sell Price - Enter the unit price at which you actually expect to sell the product in this opportunity.

 Note that the totals in the right column are calculated automatically.

The line item is calculated and added to the opportunity's summary information. Repeat this process to add additional line items.

See also

[Understanding Opportunities](#)

[Viewing Opportunities](#)

[Creating an Opportunity](#)

[Editing an Opportunity](#)

[Converting an Opportunity to an Order](#)

[Deleting an Opportunity](#)

[Searching for Opportunities](#)

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[Creating a Print or Export File](#)

Adding Notes

Notes are written comments and observations that can be composed while talking to a contact on the phone or catching up on e-mail. Notes can be written by any user with access to a module that supports notes: Accounts, Contacts, Projects, Opportunities, and Orders.

The writer of a note -- its "owner" -- is listed with the note itself in case internal discussion is warranted.

Notes about an account can be reviewed whenever a module is in [view](#) mode.

To add a note:

1. From the module's home page, click the underlined name of the record you want to annotate. The module opens in View mode.
2. Scroll down to the Notes section and click New. The Edit Note window opens.

Edit Note (Items in **bold** are required)

Subject:	Order confirmation		
Owner:	Smith, Bob		
Related To:	Account: AAA Data Centers		
Date:	07/26/2004	Time:	2:14 PM
Description:	George Heath at AAA verbally confirmed Order #2938 today by phone.		

3. Fill in the text boxes as required, and enter your note in the Description area.
 Use the [Calendar](#) feature to set the date, or just type it into the Date text box.
4. Click Save. The note is added to the summary information of the module in the Notes section.

Notes

- Tuesday, May 25, 2004 9:12 AM - **Zuffoletto, Joe** : **Sublease agreement**
Their CFO approved the sublease agreement. We can take possession July 1st.
- Tuesday, May 18, 2004 1:00 PM - **Zuffoletto, Joe** : **Sublease Agreement**
Returned my call about the sublease agreement. Said that it needed to be reviewed and
- Monday, May 17, 2004 3:27 PM - **Zuffoletto, Joe** : **Phone Call**
Called to get status on sublease agreement. Left a voicemail.

Editing Notes

To delete a note, click the Edit icon  beside the note's name, as shown above.

Deleting Notes

To delete a note, click the Delete icon  beside the note's name, as shown above.

See also

[Adding Documents](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Documents

Use this feature to attach documents to a record that are specific for only that record: invoices, purchase orders, quotes, contracts, and so on. If a document is general in nature and intended for viewing by all users, add it to the [document library](#) instead.

Documents can be attached to an account of the following type: account, contact, project, opportunity, and order by going to that account's Document section and clicking New.

In addition, they can be attached to the following record types: purchase orders, invoices, quotes or bids.

The procedure below describes how to add a document to a record. Further down, procedures describe how to edit and delete documents already attached to the record, and how to access them.

Adding Documents to a Record

To add a document to a record:

1. From any open record, scroll to the bottom of the window to the Document area and click New.

The New Document window opens.

New Document (Items in bold are required)	
Name:	<input type="text"/>
Select File:	<input type="text"/>
Document Type:	- Select One -
Related To:	Account <input type="button" value="Bob's Auto"/>
Owner:	Smith, Bob
Description:	<input type="text"/>

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - Since you are attaching the document to a record, this area is already filled in. Do not make changes to it.

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

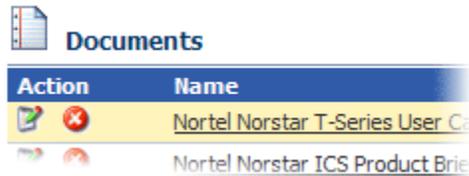
- When you are finished, click **Save** to attach the new document to the record.

Editing and Deleting Attached Documents

To edit or delete a document that is attached to a record:

- From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



- Select a document for editing or deletion.
 - To edit a document's description**, click the edit icon beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - To delete a document**, click the delete icon beside its name. Confirm the deletion, and the document is removed from the database.

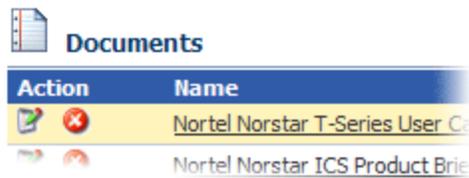
Accessing Documents Attached to Records

To access a document attached to a record, you must first open the record.

To open a document that is attached to a record:

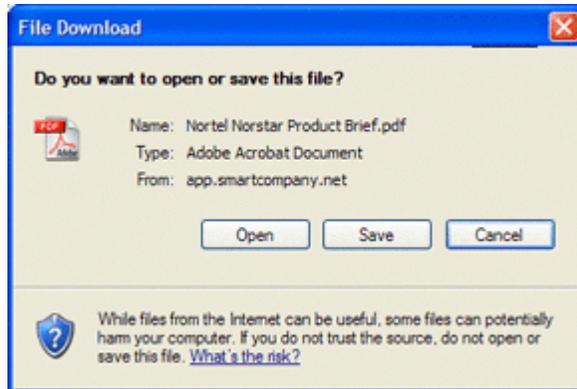
- From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



- Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The file opens for your review.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Tasks and Events

By incorporating [tasks](#) and [events](#) into a module, you can see a summary of all tasks and events related to that module when it is open in [view](#) mode. You can incorporate tasks and events into the following modules: Accounts, Contacts, Projects, Opportunities, and Orders.

NOTE: Before you can link tasks and events to an account, they must already exist on the database.

To add a tasks and events to a module:

1. From the module's home page, click the underlined name of the record to which you want to add tasks and events. The module opens in View mode.
2. Scroll down to the Tasks and Events section and click New Task or New Event. The Edit Task or Edit Event window opens.
3. Fill in the task/event window as required. For details, see [Working with Tasks](#) and [Working with Events](#).
4. Click Save. The task/event window changes to View mode. Click Done to complete the addition.

The task or event is added to the module's summary information. Repeat this process to add more tasks and/or events.

See also

[Adding Notes](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Transferring Ownership

Every record (e.g., account, contact, project, etc.) has an *owner*: the person responsible for that record.

When the record is created, its ownership is assigned by default to the person logged in during its creation.

Ownership of a record can be transferred at any time by a user with the necessary privileges.

To assign a record's ownership to another user:

1. From the home page of the module where the record is stored, click the Edit icon  beside the name of the record whose ownership you want to transfer. The record opens in Edit mode.
2. From the Owner drop down list, select the name of the user to whom you want to transfer ownership of the record.
3. Click Save. The record appears in View mode with the new owner assigned.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

Creating a Print or Export File

You can save your active module's summary list in PDF (Portable Document Format) or XLS (Excel) format for distribution and analysis by clicking the Print or Export button. For example, from the Accounts module home page, you could create an Acrobat-readable or Excel-format file of your list of accounts.

To create a print or export file:

1. Go to the home page of the module whose master list you want to print. (For example, to print a list of contacts, click the Contacts tab.)
2. Click the button that corresponds to the type of file you want to create.
 - *To create an Excel-compatible (XLS) file, click the Export button.*
 - *To create an Acrobat-compatible (PDF) file, click the Print button.*
3. Follow the file save instructions provided by your browser, and select a folder to store the file.

See also

[Importing Contacts](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

Orders Module

Understanding Orders

Orders represent closed sales and are the basis for post-sales customer support, commission tracking, payment tracking, and job costing in SmartCompany. You can track payment details against your orders, and quickly see which payments are outstanding on what orders.

Rating Orders by Status

Every order record has a *status* that tells where in the sales cycle that order is located.

An order status can have one of three *status types*:

1. **Open**, meaning fulfillment is still in progress
2. **Closed - Won**, meaning fulfillment is complete and payment has been received
3. **Closed - Lost**, meaning the order was lost for whatever reason (such as a return or cancellation).

TIP: In the Setup module, your SmartCompany administrator can configure a precise set of order statuses that fit your unique order fulfillment process.

Other Elements of the Orders Module

The Orders module also enables you to:

- [Assign participants](#) (accounts and/or contacts) to an order
- Add [line items](#) that can be factored into revenue summaries
- Add [transactions](#) to include details about chargebacks and other post-sale monetary events associated with the order
- Add [commission](#) silts that describe the distribution of commission fees to one or more salespeople.

See also

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Viewing Orders

Orders and all other records have three viewing modes:

- **List Mode** - A list of orders that appears when you go to the Orders home page. Use this to drill down to individual records.
- **View Mode** - Read-only display of order details and all related records. Use this view to get the "big picture" of the order, in relation to all your business activities.
- **Edit Mode** - An editable display of order details. Use this to make changes to an order.

Viewing in List Mode

In the Orders home page, all orders are listed in the main window. You can resort the list by clicking an underlined column head.



The screenshot shows the 'Orders' module interface. At the top left is a printer icon and the word 'Orders'. Below it is a table with the following columns: Action, Name, Owner, and Status. The table contains two rows of data:

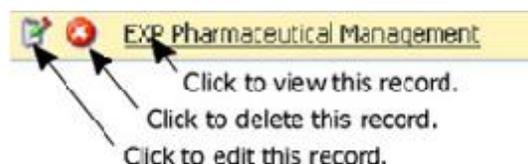
Action	Name	Owner	Status
 	<u>Kell Networking Enclosure</u>	Smith, Bob	In Progress
 	<u>HP Data Center Miami Air</u>	Smith, Bob	In Progress

In a module's home page, all of its records are listed.

✓ If you have sufficient privileges, you can save this list to a PDF or Excel file for distribution and analysis by clicking the Print or Export button. See [Creating a Print or Export file](#).

Going to other modes from the list

Go to the other modes, or delete a record, by clicking its underlined name or clicking an icon:



Viewing in View Mode

To view an order in View mode, click its underlined name in the order list.



Order:HP Data Center Miami Air

Owner:	Smith, Bob
Business Category:	Products & Services
Business Type:	1UPS (60)
Status:	In Progress
Open Date:	07/13/2004 (age: 17 days)
Entered:	Bob Smith 07/13/2004 12:30 PM
Modified:	Bob Smith 07/13/2004 12:44 PM
Last Touched:	Bob Smith 07/13/2004 12:45 PM
Description:	Need to quote a 30 ton air system

✓ You can also view an order by clicking any hyperlink to the order that appears anywhere in SmartCompany. (Hyperlinks are underlined names that appear in the order list, or in the view pages for orders, orders, orders, and orders, or in reports.)

When you open an order for viewing, you can see all aspects of the order and its links to other modules, but you cannot make changes directly to the screen.

- To *edit the order*, click the Edit button at the top right of the screen.
- To *make additions to the listed modules* below, click New in the area. (For example, to add a note, click New in the Notes summary.)
- *Click Done when finished viewing*, and you will be returned to the previous window.

Viewing, editing and deleting related records from other modules

In View mode all records related to the current one are displayed in summary form.



Line Items

Action	Product Name	Model Number
	Mini-Mate2	FH125A
	PowerSure PST - 60Hz	9999
Totals:		



Transactions

Action	Date	Type
	07/13/2004	Warranty Service
Totals:		



Commission Splits

Action	Date
	07/13/2004

In View mode, all related records are summarized.

You can access and alter these records directly from the View screen:

- To *view a related record*, click its underlined name.
- To *edit a related record*, click the Edit icon beside its name.

- To delete a related record, click the delete icon  beside its name.

Viewing in Edit Mode

To access Edit mode from the other View modes:

- From List mode, click the Edit icon  beside the order's name.
- From View mode, click the Edit button.



Edit Order (Items in bold are required)	
Name:	IP Data Center Miami Air
Owner:	Smith, Bob
Business Category:	Products & Services
Business Type:	1UPS (60)
Status:	In Progress
Open Date:	07/13/2004

In Edit mode you can make changes to a record's details.

Use Edit mode to update the individual fields of a record. Related record summaries are not visible in this mode.

See also

[Understanding Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Creating an Order

To create a new order:

1. From your SmartCompany home page, click the New Order link in the command bar.

The Edit Order page appears.

Edit Order (Items in bold are required)	
Name:	IP Data Center Miami Air
Owner:	Smith, Bob
Business Category:	Products & Services
Business Type:	1UPS (60)
Status:	In Progress
Open Date:	07/13/2004

Give your order a name that will help your colleagues categorize it easily.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Assign a name to the order that describes its nature and the account involved.

Owner - The user in your organization who is responsible for this order. The default owner is the user entering the order, but you can choose any other user if you have privileges to do so.

Business Category - Assign a business category to the order from the drop down list.

Business Type - Assign a business type to the order from the drop down list.

Status - Assign a status (an indicator of the current position in the sales cycle) to the order from the drop down list.

Open Date - Type the date or use the Calendar  to specify the date this order was placed.

Description - Enter background information about the order.

Expected Close Date - Type the date directly into the text box, or use the Calendar  to specify the date this order is expected to close.

Actual Close Date - Type the date or use the Calendar  to specify the date this order closed.

Project - If the order is to be linked with a project, enter the project name, or click the  icon to [search](#) for the project name.

Account - The account this order is associated with. Enter the account name, or click the  icon to [search](#) for the account name.

Lead Source - Assign the origin of the order (e.g., sales seminar) from the drop down list.

Reference Number - Automatically generated from your settings in [Organization Rules](#). The number cannot be altered here.

External Reference Number - Enter the prospective client's FRQ or other externally generated tracking number.

Invoice Details - If applicable, enter invoice order number, date and amount in these fields. Type the date directly into the text box, or use the Calendar  to specify the date.

Pricing and Commission Details - Enter available figures in their respective text boxes. Note that profit and commission payout amount fields are calculated automatically. (Commission defaults are specified in the [My Organization/Rules](#) section of the Setup module.)

Locations - The primary address for the ordering account is copied from the account record. In this module you can add Billing, Shipping, and Other address details as well. If they are the same as the primary address, click *copy primary address*.

 **An account can have multiple addresses and phone numbers:** Primary, Billing, Shipping, Home, and Other. The primary address is specified in the Account module. The Home address is specified in the Contacts module. Other addresses are specified in the New Opportunity module or the Orders module.

3. When you are finished, click **Save** to save the new order to the database.

 To save the current contact and create a new one right away, click Save and New.)

The order information you have just entered will appear in View mode. Click Edit if revisions are necessary.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Editing an Order

To make changes to an order's details, you must have the required permissions, and you must be in Edit mode.

To edit an order:

1. From the Orders home page or the Order view screen, go into Edit mode:
 - *To edit a order from the order home page*, click the Edit icon  next to its name in the list.
 - *To edit a order from the order view screen*, click the Edit button at the top right of the window.

The order record opens in Edit mode.

2. Make the changes you want to the order by typing new information into the text boxes.
3. Click Save. The order is updated on the database with the information you have just entered.

 **DISCARDING CHANGES AND DELETING ORDERS:** You can discard changes before saving by returning to the previous screen. Click Delete to permanently delete the order from the database. The delete button is not visible if you do not have delete privileges.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Deleting an Order

To delete an order, you must have the required permissions, and all items related to the order must previously have been deleted.

To delete an order:

1. From the Orders home page, click the underlined name of the order you want to delete. The order record opens in View mode.
2. Scroll down the order's listing and, in every module where records are displayed, click the Delete icon  to remove all records associated with this order.
3. Click Done to return to the order home page, where you will see the order in the list.
4. Click the Delete icon  next to the name of the order your want to remove permanently from the database.

TIP: Alternatively, you can click either of the **Delete** buttons at the top and bottom right of the order edit page.

After a confirmation query, the order record will be removed from the database.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Searching for Orders](#)

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[Transferring Ownership](#)

[Creating a Print or Export File](#)

Searching for Orders

SmartCompany gives you two ways to locate a specific order on the database.

- *If you know all or part of the order's name, or the account or participant name, use the basic Search function.*
- *If you need to search by something other than name, use the SmartSearch function.*

Using the basic Search function

To search for an order using the Search function:

1. In the Orders home page, type the name of the order you want to find in the Search text box.

 **SEARCH TIP:** Use only single words, or the first few letters of a word or name. Case does not matter. Avoid punctuation.
2. (Optional) If you want to find only records that you own, activate the *Show only mine* checkbox.
3. (Optional) If you want to search the entire database instead of just the current module, activate the *entire site* option button.
4. (Optional) You can specify a date range for the search using the drop down list and calendar icons:
 - From the Entered Date drop down list, set the parameters for the date(s): After, On or after, Today, Yesterday, Range, etc.
 - Use the first calendar icon  to specify single-date settings (After, On or after, etc.). Use both calendar icons to specify ranges (Range).
 -  If you specify dates in both calendar icons, the Range option will automatically be displayed in the Entered Date drop down list.
5. Click the Search button.
6. If your search is successful, orders that match your search will be listed in the application window. You can [view, edit or delete](#) the record you want by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

Using the advanced SmartSearch function

Use SmartSearch when your search involves several criteria. For example, in a search of order records, you could remember part of a person's name and the street name of their company. This is sufficient information for SmartSearch to return matching records.

To carry out a SmartSearch:

1. In any module, click the SmartSearch link:  [Wizard](#)
The SmartSearch window opens.
2. Review the search options and set search conditions using the minimum number of options.
3. From the *Return orders* drop down list, specify whether you want the search to match All or Any of the search options.
4. (Optional) Once you have entered all the search criteria, and you think you would like to conduct a similar search in the future, enter a name for the search and click the Save button at the top right of the application window. Activate the Private check box if you want the saved SmartSearch to be accessible only to you.

In future you will be able to call up the same search by selecting the saved SmartSearch from your home page or from any module except Setup. Remember, however, that the saved search will function only in the module in which it was created.

5. Click the Search button, located at the top and bottom right of the window.
6. If your search is successful, records that match your search will be listed in the application window. You can [view, edit or delete](#) a record by clicking on its icons or name.

An unsuccessful search will open a message stating that no matches were found, followed by a description of the active module and search tips and techniques.

See [this link](#) for more information about using SmartSearch.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Assigning Participants to an Order

Participants are [contacts](#) (people) or [accounts](#) (organizations) that are involved with your order.

To add participants to an order:

1. From the Orders home page, click the underlined name of the order to which you want to add participants. The order opens in View mode.
2. Scroll down to the Participants section and click New. The Edit Order Participant window opens.

Participants can be either contacts or accounts.

3. Fill in the text boxes:
 - Name** - Assign a name to the order that describes its nature and the account involved.
 - Participant** - From the drop down list select Account or Contact, and then enter the name in the text box to the right. If you can't remember the exact name, click the  icon to [search](#) for the account or contact name.
 - Role** - Select the role this participant will play in the order.
 - Description** - Enter a description of the participant's activities and role in the order.
4. Click Save. The window changes to View mode. Click Done to complete the addition.

The participant is added to the order's summary information. Repeat this process to add additional participants.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

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Adding Line Items to an Order

If your company subscribes to SmartCompany's Price Book, your administrator has set up line items for quick reference to products and services offered by your company.

In the Opportunities and Orders modules, you use line items to forecast and record sales:

- *In the Opportunities module*, tracking line items gives you the ability to run sales forecasts broken down by product and product line.
- *In the Orders module*, tracking line items lets you view sales totals at the product level.

To add line items to an order record:

1. From the Orders home page, click the underlined name of the order to which you want to add line items. The order opens in View mode.
2. Scroll down to the Line Items section and click New. The Edit Line Items window opens.

Edit Order Line Item <small>(Items in bold are required)</small>	
Order:	HP Data Center Miami Air
Product:	Mini-Mate2
Vendor:	Liebert
Product Line:	Air (10)
Description:	Environmental
Model Number:	FH125A
SKU:	
Quantity:	3
Unit of Measure:	ea.
Unit Cost:	6000.00
List Price:	15000.00
Expected Sell Price:	12000.00
	Total
	Total List
	Total Expected Sell

The cost details entered here will be factored into revenue forecasts.

Edit Order Line Item (Items in **bold** are required)

Order:	CORE SmartCompany - 8 users
Product:	<input type="text"/> 🔍
Vendor:	<input type="text"/>
Description:	<input type="text"/>
Model Number:	<input type="text"/>
Quantity:	<input type="text"/>
Unit Cost:	<input type="text"/>
Unit List Price:	<input type="text"/>
Unit Sell Price:	<input type="text"/>

3. Fill in the text boxes:

Order - This is a read-only link to the detailed listing for the order.

Product - Enter the name of the product this order is based on, or click the 🔍 icon to [search](#) for the project name.

Vendor - Read-only, based on the records you created in the Vendors and Products area of Setup.

Product Line - From the drop down list, select the product line.

Serial Number - Enter the item's serial number, if applicable.

Description - Enter a brief description of the product.

Model Number - Enter the product's model number, if applicable.

SKU - Enter the product's Stock Keeping Unit number, if applicable.

Quantity - Enter the quantity of products you hope to sell via this order.

Unit Measure - Enter the unit of measurement (feet, pounds, etc.) if applicable. If sold as single units enter "ea." (for "each").

Unit Cost - Enter the wholesale or manufacturing cost per unit

List Price - Enter the product's advertised unit list price.

Expected Sell Price - Enter the unit price at which you actually expect to sell the product in this order.

✅ Note that the totals in the right column are calculated automatically.

The line item is calculated and added to the order's summary information. Repeat this process to add additional line items.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Transactions to an Order](#)

[Adding Commission Splits to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Adding Transactions to an Order

A *transaction* is a special record type that collates ancillary costs -- chargebacks and other post-sale monetary events -- that are often associated with orders. In an order record's View mode, transaction costs are summarized and totalled.

To add transactions to an order record:

1. From the Orders home page, click the underlined name of the order to which you want to add transactions. The order opens in View mode.
2. Scroll down to the Transactions section and click New. The Edit Line Items window opens.

Order:	HP Data Center Miami Air
Date:	07/13/2004
Type:	Warranty Service
Vendor:	Liebert
Description:	LGS Services
Amount:	10000.00
Is Chargeback:	<input checked="" type="checkbox"/>

The amount entered here will be factored into a total of transaction costs, displayed in the order's View mode.

3. Fill in the text boxes:

Order - This is a read-only link to the detailed listing for the order.

Date - Type the date or use the Calendar to specify the date of the transaction.

Type - From the drop down list, select the type of transaction.

Vendor - From the drop down list, select the vendor.

Product Line - From the drop down list, select the product line.

Description - Enter a description of the transaction in this text box.

Amount - Enter amount of the transaction. This figure will be added to the total of transaction costs for this order.

Is Chargeback - Activate the check box if this transaction is a chargeback to an order payment.

The transaction is calculated and added to the order's summary information. Repeat this process to add additional transactions.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

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[Transferring Ownership](#)

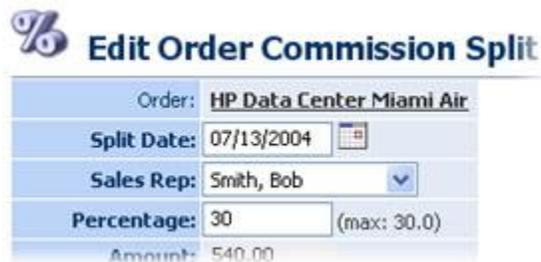
[Creating a Print or Export File](#)

Adding Commission Splits to an Order

A *commission split* is a record that describes the distribution of an order's commission payments. In orders that involve split commissions, for each commissioned sales person involved in an order a commission split record must be created.

To add commission splits to an order record:

1. From the Orders home page, click the underlined name of the order to which you want to add commission splits. The order opens in View mode.
2. Scroll down to the Commission Splits section and click New. The Edit Line Items window opens.



Order:	HP Data Center Miami Air
Split Date:	07/13/2004
Sales Rep:	Smith, Bob
Percentage:	30 (max: 30.0)
Amount:	540.00

The amount entered here will be factored into a total of commission splits, displayed in the order's View mode.

3. Fill in the text boxes:

Order - This is a read-only link to the detailed listing for the order.

Split Date - Type the date or use the Calendar  to specify the date of the commission split.

Sales Rep - From the drop down list, select the name of the sales representative that will be used for this commission split record.

Percentage - Enter the percentage of the overall commission this rep will receive, up to 30 percent (or as specified by the SmartCompany administrator in the Setup module).

Product Line - From the drop down list, select the product line.

Amount - This read-only field is based on the above-specified percentage, and the commission calculated for the order by SmartCompany.

The commission split is calculated and added to the order's summary information. Repeat this process to add commission splits for additional sales reps.

See also

[Understanding Orders](#)

[Viewing Orders](#)

[Creating an Order](#)

[Editing an Order](#)

[Deleting an Order](#)

[Searching for Orders](#)

[Assigning Participants to an Order](#)

[Adding Line Items to an Order](#)

[Adding Transactions to an Order](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

[Creating a Print or Export File](#)

Adding Notes

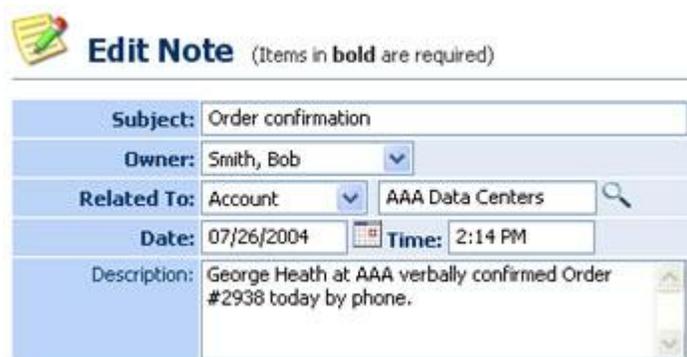
Notes are written comments and observations that can be composed while talking to a contact on the phone or catching up on e-mail. Notes can be written by any user with access to a module that supports notes: Accounts, Contacts, Projects, Opportunities, and Orders.

The writer of a note -- its "owner" -- is listed with the note itself in case internal discussion is warranted.

Notes about an account can be reviewed whenever a module is in [view](#) mode.

To add a note:

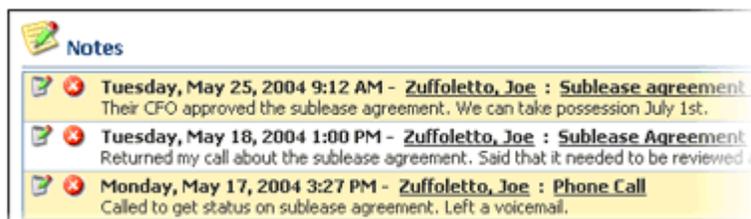
1. From the module's home page, click the underlined name of the record you want to annotate. The module opens in View mode.
2. Scroll down to the Notes section and click New. The Edit Note window opens.



Edit Note (Items in **bold** are required)

Subject:	Order confirmation
Owner:	Smith, Bob
Related To:	Account AAA Data Centers
Date:	07/26/2004
Time:	2:14 PM
Description:	George Heath at AAA verbally confirmed Order #2938 today by phone.

3. Fill in the text boxes as required, and enter your note in the Description area.
 - ✔ Use the [Calendar](#) feature to set the date, or just type it into the Date text box.
4. Click Save. The note is added to the summary information of the module in the Notes section.



Editing Notes

To delete a note, click the Edit icon  beside the note's name, as shown above.

Deleting Notes

To delete a note, click the Delete icon  beside the note's name, as shown above.

See also

[Adding Documents](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Documents

Use this feature to attach documents to a record that are specific for only that record: invoices, purchase orders, quotes, contracts, and so on. If a document is general in nature and intended for viewing by all users, add it to the [document library](#) instead.

Documents can be attached to an account of the following type: account, contact, project, opportunity, and order by going to that account's Document section and clicking New.

In addition, they can be attached to the following record types: purchase orders, invoices, quotes or bids.

The procedure below describes how to add a document to a record. Further down, procedures describe how to edit and delete documents already attached to the record, and how to access them.

Adding Documents to a Record

To add a document to a record:

1. From any open record, scroll to the bottom of the window to the Document area and click New.

The New Document window opens.

New Document (Items in bold are required)	
Name:	<input type="text"/>
Select File:	<input type="text"/>
Document Type:	- Select One -
Related To:	Account <input type="button" value="Bob's Auto"/>
Owner:	Smith, Bob
Description:	<input type="text"/>

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - Since you are attaching the document to a record, this area is already filled in. Do not make changes to it.

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

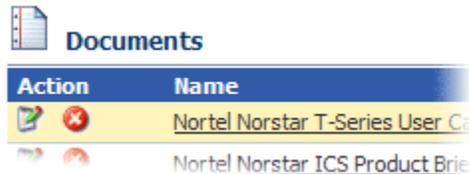
- When you are finished, click **Save** to attach the new document to the record.

Editing and Deleting Attached Documents

To edit or delete a document that is attached to a record:

- From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



- Select a document for editing or deletion.
 - To edit a document's description**, click the edit icon beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - To delete a document**, click the delete icon beside its name. Confirm the deletion, and the document is removed from the database.

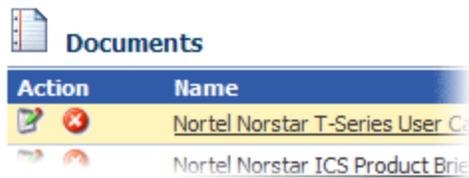
Accessing Documents Attached to Records

To access a document attached to a record, you must first open the record.

To open a document that is attached to a record:

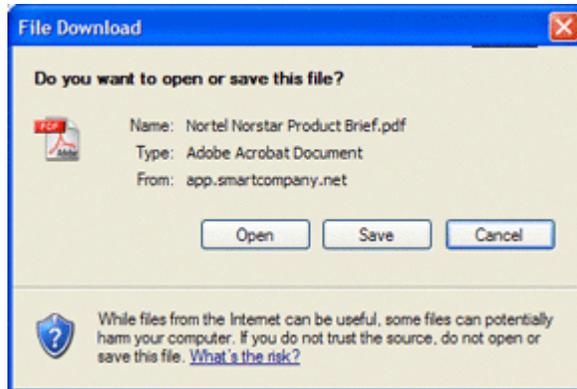
- From any open record, scroll to the bottom of the window to the Document area.

Attached documents are listed.



- Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The file opens for your review.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Adding Tasks and Events

By incorporating [tasks](#) and [events](#) into a module, you can see a summary of all tasks and events related to that module when it is open in [view](#) mode. You can incorporate tasks and events into the following modules: Accounts, Contacts, Projects, Opportunities, and Orders.

NOTE: Before you can link tasks and events to an account, they must already exist on the database.

To add a tasks and events to a module:

1. From the module's home page, click the underlined name of the record to which you want to add tasks and events. The module opens in View mode.
2. Scroll down to the Tasks and Events section and click New Task or New Event. The Edit Task or Edit Event window opens.
3. Fill in the task/event window as required. For details, see [Working with Tasks](#) and [Working with Events](#).
4. Click Save. The task/event window changes to View mode. Click Done to complete the addition.

The task or event is added to the module's summary information. Repeat this process to add more tasks and/or events.

See also

[Adding Notes](#)

[Creating a Print or Export File](#)

[Transferring Ownership](#)

Transferring Ownership

Every record (e.g., account, contact, project, etc.) has an *owner*: the person responsible for that record.

When the record is created, its ownership is assigned by default to the person logged in during its creation.

Ownership of a record can be transferred at any time by a user with the necessary privileges.

To assign a record's ownership to another user:

1. From the home page of the module where the record is stored, click the Edit icon  beside the name of the record whose ownership you want to transfer. The record opens in Edit mode.
2. From the Owner drop down list, select the name of the user to whom you want to transfer ownership of the record.
3. Click Save. The record appears in View mode with the new owner assigned.

See also

[Adding Notes](#)

[Adding Tasks and Events](#)

[Creating a Print or Export File](#)

Creating a Print or Export File

You can save your active module's summary list in PDF (Portable Document Format) or XLS (Excel) format for distribution and analysis by clicking the Print or Export button. For example, from the Accounts module home page, you could create an Acrobat-readable or Excel-format file of your list of accounts.

To create a print or export file:

1. Go to the home page of the module whose master list you want to print. (For example, to print a list of contacts, click the Contacts tab.)
2. Click the button that corresponds to the type of file you want to create.
 - *To create an Excel-compatible (XLS) file, click the Export button.*
 - *To create an Acrobat-compatible (PDF) file, click the Print button.*
3. Follow the file save instructions provided by your browser, and select a folder to store the file.

See also

[Importing Contacts](#)

[Adding Notes](#)

[Adding Tasks and Events](#)

[Transferring Ownership](#)

Reports Module

Understanding Reports

Reports are detailed summaries, in spreadsheet layout with built-in charts, of sales progress: both pending and completed sales.

There are two general report types: *pipeline summaries* (orders not yet completed) and *sales summaries*.

Each contains several reports. The reports differ in how they are organized. For example, the Sales Summary by Account report provides the following sales data for each account: Total Sell Price, Gross Profit, Gross Margin, Net Profit, and Net Margin.

Account	Total Sell Price	Gross Profit	Gross Margin%
E&J Winery	1,000.00	1,000.00	100.00
Actelion Pharm	567.00	162.00	28.57
GRAND TOTALS	\$1,567.00	\$1,162.00	74.15%

This sales summary report is based on accounts.

Charts in Reports

Along the table-format summaries (as shown above), all SmartCompany reports also include color charts that summarize the same information in a graphical format. You can right-click and use Windows' copy-and-paste feature to bring report graphics into other applications.



Every reports includes charts that sum up information graphically.

See also

[Creating a Report](#)

[Exporting a Report](#)

Creating a Report

Reports are created in the home page of the Reports module. To generate reports you must have permission to do so from the SmartCompany administrator.

To create a report:

1. From the Reports module's home page, click the underlined name of the report you want to create. The report type opens.
2. In the Criteria section, specify the dates of the order or opportunity. You can enter the dates directly into the text boxes, or use the Calendar feature .
3. Click Run. The report is generated and displayed on-screen.
 - ✔ Use the [Export](#) feature to save the report in an Excel-readable file.

See also

[Understanding Reports](#)

[Creating a Report](#)

[Exporting a Report](#)

Exporting a Report

After running a report, you can export it to an Excel-compatible (XLS) file for analysis in spreadsheet and database software.

✔ Note that only the text portion of the report is exported. To use a report's charts in other programs, right-click and use copy-and-paste.

To export a report:

1. Run the report, as described in [Creating a Report](#).
2. From the report display window, click the Export button.

You will receive a download confirmation query.

3. Click Yes and select a destination folder.
4. Click Save to save the report to your PC.

See also

[Understanding Reports](#)

[Creating a Report](#)

[Exporting a Report](#)

Setup Module

Understanding Setup

Setup is the module dedicated to configuration of all aspects of the SmartCompany application.

When SmartCompany is first installed, the SmartCompany administrator uses the Setup module to enter company information: users, accounts, vendors, products -- all the details that will be used by the various modules to create records, and from those records, summaries and reports.

Configuring drop down lists

In addition, the administrator fine-tunes the contents of drop down lists ("picklists"), so they match your company's culture and wording. For example, in the Lists section of Setup, the administrator can supplement the pre-packaged Influence categories with additional ones specific to your company:



The last option in the Influence list was created by the administrator.

While the majority of setup operations are done when SmartCompany is first installed, the administrator will return to this module frequently, adding new users, revising lists and categories, adding new accounts, and defining roles that specify how much access users have to SmartCompany's modules and features.

For details about setting up various components of SmartCompany, click on the titles below:

Setting Up My Organization	Enter details about your company: name, address, and so on
Setting Up My Account	Create your "super-administrator" account, including password and e-mail and other contact information, and so on
Setting Up Roles	Define the authority of the various user levels (roles): access to modules, permission to access orders, etc.
Setting Up Users	Enter details about each SmartCompany user; deactivate users, and so on

Setting Up Lists	Define the drop down lists that users can choose options from: e.g., the influence level of a contact, as shown above
Setting Up a Document Library	Specify which documents are to be shared across all modules.
Importing Accounts and Contacts	Open the Import Accounts and Contacts wizard to add records to the SmartCompany database from applications like ACT!, GoldMine, salesforce.com, and Outlook.
Setting Up Vendors and Products	Add vendors and products to your database for inclusion in orders, sales projections, and other calculations

Setting Up My Organization

This area is filled in with your company name and details about the designated SmartCompany administrator when the program is purchased and installed.

You can return to this area of Setup to make changes to the company or the administrator.

Changing Company Details

Company details include your company's name, address and contact details, and basic order and accounting details.

To make changes to company details:

1. In the Setup home page, click My Organization. The Organization window opens with details about the company and administrator on display.
2. Click the large Edit button at the top of bottom of the screen.

The Edit window opens, with text boxes for details about the company.

3. Enter updated information in the text boxes as required. (You can also change your Welcome Message from here if desired.)
4. Click Save.

The company information is updated in the database.

Changing Subscription Information

Whenever you log in, SmartCompany verifies your subscription status. If it changes -- for example, if you extend your subscription -- the server will automatically update the information in this area.

If you or other users receive errors during login, and think your subscription information is inaccurate, contact [SmartCompany Technical Support](#).

Changing Organization Rules

Organization rules predetermine order number format for orders and opportunities. In addition, they specify the use of a specified close date on orders and opportunities, and how commissions are calculated.

To make changes to organization rules:

1. In the Setup home page, click My Organization. The Organization window opens with details about the company and administrators on display.
2. In the Rules summary area, click Edit.

The Rules area opens in Edit mode.

3. Make changes to the rules as required:

- **Auto Assign Opportunity Reference Numbers**
 - a. Activate the checkbox if you want to auto assign numbers according to the format you specify here.
 - b. Use the remaining drop down lists to specify the format of the auto-assigned numbers. In *Reference Number Uniqueness*, select Sequential to keep all numbers in the same sequence, or Within Prefix to begin new sequences under the prefixes.
 - **Auto Assign Order Reference Numbers**
 - a. Activate the checkbox if you want to auto assign numbers according to the format you specify here.
 - b. If a close date is to be used, enter the default duration of the transaction -- the number of days expected to elapse before it closes.
 - **Expected Close Date**
 - a. Activate the Required checkbox if you want include a close date field in opportunities and orders.
 - b. In the Default Duration text box, enter the number of days (for example, 45) that will serve as a default for the order to close. (The user can over-ride this number when creating the order.)
 - **Commission Earned**
 - a. From the Default drop down list, select the method by which commission will usually be determined: Manual, entered manually into the order; or Gross Profit/Net Profit, based on a calculation of the gross or net profit.
 - b. If the commission is to be based on profit, enter the default percentage in the second box.
 - **Outlook Integration**
 - For integration with Outlook records, the Contacts Without Accounts rule will alert you to contacts that do not presently have SmartCompany accounts, and prompt you to create one.
 - **Report Options**
 - In the text boxes, enter the number of days that define timelines for pipeline sales forecasts. The default is 30, 60, 90, and 120.
4. Click Save.

The rules information is updated on the database.

Changing Administrator Details

To make changes to administrator details:

1. In the Setup home page, click My Organization. The Organization window opens with details about the company and administrators on display.
2. Click the underlined name of the administrator whose details you want to edit.

The administrator's record opens in View mode.

3. Click Edit. The administrator's record opens in Edit mode with text boxes for all details about the administrator .
4. Enter updated information in the text boxes as required. Select or deselect roles as needed.
5. Click Save.

The administrator information is updated on the database.

Resetting an administrator's password

If a user has forgotten their password, go through the Change Administrator Details process, described above, and click *Reset Password* from the edit window.

An e-mail will be sent to the user with a new password, so they can log in to SmartCompany once again.

Creating a welcome message

The Welcome Message appears at the top of every user's home page and is useful for company-wide news and announcements.

To create a welcome message:

1. In the Setup home page, click My Organization. The Organization window opens with details about the company.
2. Click the large Edit button at the top of bottom of the screen.
3. Type your welcome message into the Welcome Message text box.
4. Click Save.

The new welcome message takes effect immediately.

TIP: You can embed HTML in your welcome message to provide links to other sites, display images, and so on.

See also

[Understanding Setup](#)

[Setting Up My Account](#)

[Setting Up Roles](#)

[Setting Up Users](#)

[Setting Up Lists](#)

[Setting Up Vendors and Products](#)

[Setting Up a Document Library](#)

[Importing Accounts and Contacts](#)

Setting Up My Account

This section refers to your SmartCompany user account, which you can update at any time if your SmartCompany administrator has granted you that privilege.

To make changes to your user account:

1. In the Setup home page, click My Account. The My Account window opens with details about your account.
2. Click the Edit button.

The Edit window opens, with text boxes for all details about your account.

3. Enter updated information in the text boxes as required. If you have sufficient privileges, select or deselect roles as needed.
4. Click Save.

Your account information is updated in the database.

See also

[Understanding Setup](#)

[Setting Up My Organization](#)

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Setting Up My Preferences

The settings in this area affect only the currently logged-in user. They specify defaults in commonly used areas, so the user is required to change information only when a non-default reply is indicated.

To change user preferences:

1. In the Setup home page, click My Preferences. The My Preferences window opens with details about your current preferences.
2. From the drop down lists, or by keying directly, make changes to your preferences as required.
3. Click Save.

Your preferences are updated in the database.

See also

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Setting Up Roles

Roles are predefined sets of responsibilities, named and assigned to users. For example, a user could be assigned an "administrator" role and thus have permission to add other users and have access to all SmartCompany modules. Users can be assigned multiple roles, in which case they inherit the combined permissions from all the roles.

In this section, roles are created and edited.

Creating a role

To create a role:

1. In the Setup home page, click Roles. The Roles window opens with a list of currently defined roles.
2. Click the New button.

The New Role window opens, with check boxes for privilege types and levels of authority in each major area of the program.

Edit Role (Items in **bold** are required)

Role Name: Sales Manager

Description: Has authority over all sales staff, decides...

Privileges

Type	All	View	Add	Edit
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Opportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Order Commission Splits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Order Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vendors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Product Lines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setup

Privilege	Description
Edit Organization	<input checked="" type="checkbox"/> Allows the ability to edit th
Edit Users	<input checked="" type="checkbox"/> Allows the ability to edit th

3. In the Name and Description section, give a name that is descriptive of the new role, and a description of its range of authority.

4. In the Privileges section, select the functions that you want to confer to this user in each area.
 Selecting ALL will activate all an element's check boxes. You can then uncheck the privileges you do not want to confer.
5. In the Setup section, activate the check boxes in areas you want the role to have editing authority.
6. Click Save. The new role is saved and displayed on the list of roles in the Roles summary window.

Editing a role

To edit an existing role:

1. In the Setup home page, click Roles. The Roles window opens with a list of currently defined roles.
2. Click the underlined name of the role you want to edit.

The Role Edit window opens, with the selected role's properties displayed.

3. Make the necessary changes to the role's privileges and click Save.

The updated role is saved and displayed on the list of roles in the Roles summary window.

See also

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Setting Up Users

Users are people in your company who have access to the SmartCompany application. When you first installed SmartCompany you created a list of users, with details about each person in your company who is authorized to use the program.

In this section of Setup, you can add new users or edit the properties of existing users.

Creating a user

To create a user:

1. In the Setup home page, click Users. The Users window opens with a list of currently defined users.
2. Click the New button.

The New User window opens, with text boxes for details and check boxes for roles.

3. Fill in the check boxes. Ones with bolded titles are mandatory.
 - Assign Short Names (nicknames, as in "Bob" for "Robert McCormack") for quick user lookup.
4. Assign roles to this user by activating checkboxes in the Roles area.
 - Use a preconfigured role, or create additional roles in the [Roles](#) area of Setup.
5. Click Save. The new user is saved and displayed on the list of users in the Users summary window.

Editing a user

To edit an existing user:

1. In the Setup home page, click Users. The Users window opens with a list of currently defined users.
2. Click the underlined name of the user you want to edit.

The User window opens, with the selected user's properties displayed.

3. Make the necessary changes to the user's details and roles and click Save.

The updated user is saved and displayed on the list of users in the Users summary window.

Resetting a user's password

If a user has forgotten their password, go through the Editing a user process, described above, and click *Reset Password* from the edit window.

An e-mail will be sent to the user with a new password, so they can log in to SmartCompany once again.

See also

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Setting Up Lists

Lists are the drop down lists (or "picklists") that contain elements from which you make selections to create records. For example, when creating a record for a sales contact, you select the element that best describes their influence on the future sale: Strong, Neutral, Weak, and so on.

In this section of Setup, you can add new elements to lists and edit existing elements. You can also change the sequence in which elements are listed.

SmartCompany comes supplied with many preconfigured lists, each with its own pre-defined elements.



Name	Description
<u>Account Rating</u>	Priority ratings for accounts.
<u>Account Type</u>	An account's relationship to the organization.
<u>Business Category</u>	The category of business represented by an opportunity or order.
<u>Business Type</u>	The type of business represented by an opportunity or order.
<u>Categories</u>	Keywords for grouping accounts and contacts.
<u>Contact Type</u>	A contact's relationship to the organization.
<u>Honorific</u>	Mr., Ms., Mrs., etc. for contacts.
<u>Industry</u>	Industries to which accounts are assigned.
<u>Influence</u>	The influence a contact exerts within their account.
<u>Lead Source</u>	The originator of a lead.
<u>Opportunity Status</u>	The current status of an opportunity.
<u>Order Status</u>	The current status of an order.
<u>Ownership</u>	Corporate ownership structure for accounts.
<u>Participant Role</u>	A contact's role within a project, opportunity, etc.
<u>Perception</u>	A contact's perception of the organization.
<u>Product Category</u>	The general category to which a product line belongs.

SmartCompany comes supplied with many lists. You cannot create new lists, but you can redefine and edit list elements.

In this part of the program you can add or edit elements to match your company's priorities and culture.

Adding Elements to a List

To add elements to a list:

1. In the Setup home page, click Lists. The Lists window opens with a display of preconfigured lists.
2. Click the underlined name of the list to which you want to add a new element.

The selected list opens, with currently configured elements displayed.

3. Click Add. The Edit List Element window opens.



4. Type a new element name in the blank text box and click Save.

The new element is added to the top of the list.

Editing Elements on a List

To edit a list element:

1. In the Setup home page, click Lists. The Lists window opens with a display of preconfigured lists.
2. Click the underlined name of the list you want to edit.
3. The selected list opens, with currently configured elements displayed.
4. Select the underlined name of the element you want to change and click Edit. The Edit List Element window opens with the current element name in the text box.
5. Type the revised element name in the blank text box and click Save.

The element is updated to the new wording.

Deleting Elements from a List

To remove an element from a list:

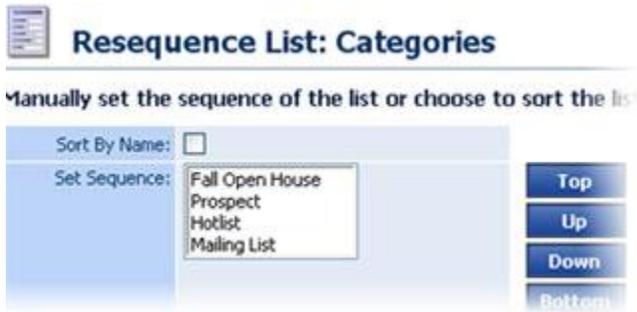
1. In the Setup home page, click Lists. The Lists window opens with a display of preconfigured lists.
2. Click the underlined name of the list from which you want to remove an element.
3. The selected list opens, with currently configured elements displayed.
4. Select the underlined name of the element you want to change and when its edit window appears, click Delete.
5. After a confirmation of the deletion, the element will be removed from the list.

Changing the Sequence of Elements

To change the position of an element in a list:

1. In the Setup home page, click Lists. The Lists window opens with a display of preconfigured lists.
2. Click the underlined name of the list in which you want to reorder elements.
3. The selected list opens, with currently configured elements displayed in the same order they will appear to the user.

- Click Change Display sequence. The Display Sequence window opens.



- Use the commands in this window to reorder the elements in the list:
 - Activate the Sort by Name check box to sort the list alphabetically.
 - Select an element and click:
 - Top*: To move it to the top of the list
 - Bottom*: To move it to the bottom of the list
 - Down*: To move it one position down in the list
 - Up*: To move it one position up in the list
- Click Save to save the reordered list. The reordered list is displayed.

See also

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Setting Up Vendors and Products

In this area of the Lists module you specify the companies you buy from (vendors) and the products you buy from them.

The order of record creation is 1) vendor; 2) product lines; 3) products. However, you must first create *product categories* in the [Lists](#) area before creating products in this section.

This information is used in the Orders and Opportunities modules to summarize current and anticipated sales.

Setting Up a Vendor

To set up a vendor:

1. In the Setup home page, click Vendors and Products. The Vendors and Products window opens with a list of currently defined vendors.
2. Click the New button.

The Edit Vendor window opens, with text boxes for the vendor name and a description of the company.



Edit Vendor (Items in bold are required)	
Name:	Akron Rubber Company
Description:	Rubber-based fittings and joiners
Product Lines:	0
Products:	0

3. In the Name and Description section, give a name that is descriptive of the new vendor, and a description of its product type and range.
4. Click Save. The new vendor is added to the list.

Setting Up Product Lines and Products

To more easily keep track of a company's potentially numerous product offerings, SmartCompany enables you to create product lines into which you can group similar types of products from a vendor.

To add product lines to a vendor's lineup:

1. In the Vendors and Products home page, click the underlined name of the vendor to whom you want to add products.

The vendor's record opens, displaying the product lines currently assigned to them, if any.

2. Click the New button in the Product Lines area.

The Edit Product Line window opens, with text boxes for the product line name and description.

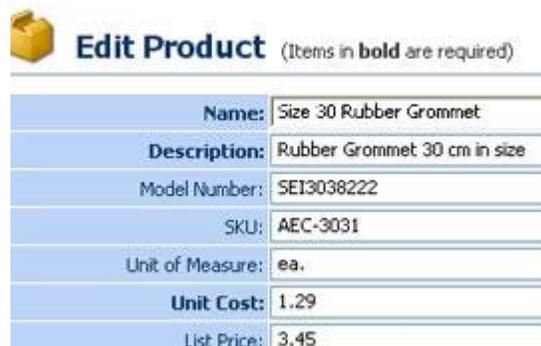


Edit Product Line (Items in bold are required)	
Name:	Grommets
Description:	Rubber grommets from Akron Rubber Co.
Product Category:	Fittings

- In the Name and Description section, give a name that is descriptive of the new product line, and a description of its product type and range.
- Select a product category from the drop down list.

TIP: If a product category does not exist for this line, create one in [Lists](#): Product Categories.

- Click Save. The new product line is added to the vendor.
- In the Products area, click New. The Edit Product window opens, with text boxes for the product name and description, and ID and cost figures.



Edit Product (Items in bold are required)	
Name:	Size 30 Rubber Grommet
Description:	Rubber Grommet 30 cm in size
Model Number:	SEI3038222
SKU:	AEC-3031
Unit of Measure:	ea.
Unit Cost:	1.29
List Price:	3.45

- Enter the product ID and cost information, then click Save. The product is shown in the Product Lines window.
- Click Done. The vendor record is displayed with product line information below.

Editing Vendors, Product Lines, and Products

All vendor-related records -- vendors, product lines, products -- are updated in the same way.

Drill down to the level of record you want to change by clicking on the underlined names of vendor, product line, and if necessary, product. At the correct level, click Edit and make changes. Then click Save.

Click Done to go back up the hierarchy to the vendor level.

Deleting Products

Note that you can delete products, but for audit purposes you cannot delete product lines or vendors.

To delete a product:

1. In the Vendors and Products home page, click the underlined name of the vendor whose product you want to delete.

The vendor's window opens, with a list of product lines.

2. Click the name of the product line that contains the product you want to delete.

The Product Line window opens, with a list of products in that line.

3. Click the underlined name of the product you want to delete.

The Product window opens.

4. Click Delete. After you confirm deletion, the product is removed from the product line.

5. Delete additional products or click Done to work back up the hierarchy.

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Setting Up a Document Library

Efficient document management is of critical importance to company operations, and a comprehensive document library can make the process much more manageable.

A document library is a storage place for all kinds of informational files that are used by various departments. These file types can include fax templates, invoice templates, quote templates, company policies, price sheets, marketing materials, and so on.

⚠ You can also attach documents to accounts and other entities. These documents are NOT listed as part of the document library and are not available to all users. Rule of thumb: If a document is general in nature (for example, a price sheet), store it in the document library. If the document is specific to a record (for example, invoice, purchase order, quote, contract, and so on), use the [Add Document](#) feature to attach the document to that record.

Adding Documents Overview

When you first set up SmartCompany, be prepared to invest some time in creating your document library, and in training authorized staff to add to it and use it.

Documents are added directly to the library from any module, using the New Document link. See the procedure, below. Further down are instructions about editing and deleting documents already on the system, and how to access them.

✅ You cannot change the contents of a document in the library. Instead, open the document from its originating application, make changes, save, and re-import the document into the library.

Adding Documents to the Library

To add a document to the document library:

1. From any module, click the New Document link in the command bar. The New Document window opens.

2. Enter data into this form as follows. Note that titles bolded on-screen are required fields.

Name - Give a descriptive name to the document. File extensions are not required, as this name will be for internal reference only.

Select File - Click Browse to select the document from your network. Note that a document can be any kind of file.

Document Type - Select the document type from the drop down list. Change the selections in the list from the [Setup/Lists](#) command.

Related To - From the drop down list, select the module from which this document originates. (If you want to attach a document to a specific record, use the Search icon  to locate the record name. Note that the document will no longer appear in the document library list and can only be seen from that record.)

Owner - Select the SmartCompany user who originated the document. By default, the name that appears is the current logged in user.

Description - For reference by other users, enter a description of the document.

3. When you are finished, click **Save** to save the new document to the library.

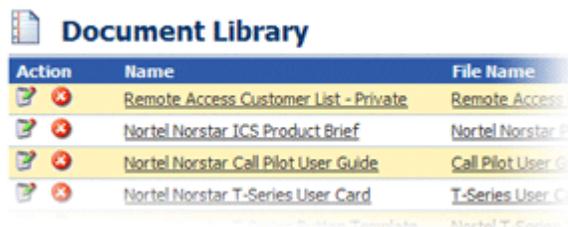
The document will immediately appear in the Document Library list.

Editing and Deleting Documents in the Library

To edit or delete a document in the document library:

1. From the Setup module select Document Library.

The Document Library window opens, listing documents already in the library.



Action	Name	File Name
 	Remote Access Customer List - Private	Remote Access
 	Nortel Norstar ICS Product Brief	Nortel Norstar P
 	Nortel Norstar Call Pilot User Guide	Call Pilot User G
 	Nortel Norstar T-Series User Card	T-Series User C

2. Select a document for editing or deletion.
 - **To edit a document's description**, click the edit icon  beside its name. The Edit Document window opens. Change the document's description and then click Save.
 - **To delete a document**, click the delete icon  beside its name. Confirm the deletion, and the document is removed from the database.
- **To edit a document that is attached to a record**, open that record and scroll down to the Document area. Click the edit or delete icons beside the document name, as described above.

Accessing Documents from the Document Library

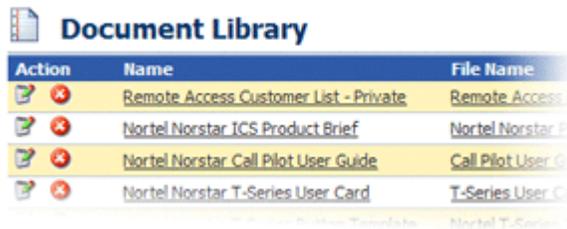
Library documents can be accessed by going to the Document Library section of the Setup menu.

✓ **To access a document related to a record**, open that record and scroll down to the Documents area, near the bottom of the screen.

To open a document currently stored in the document library:

1. From the Setup module select Document Library.

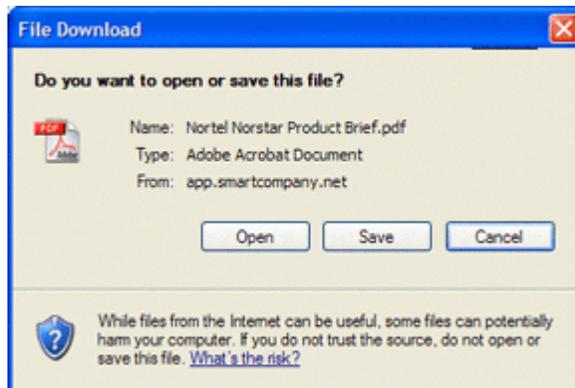
The Document Library window opens, listing documents already in the library.



Action	Name	File Name
 	<u>Remote Access Customer List - Private</u>	<u>Remote Access I</u>
 	<u>Nortel Norstar ICS Product Brief</u>	<u>Nortel Norstar P</u>
 	<u>Nortel Norstar Call Pilot User Guide</u>	<u>Call Pilot User G</u>
 	<u>Nortel Norstar T-Series User Card</u>	<u>T-Series User Co</u>

2. Select a document you want to open by clicking its underlined name in the File Name column.

You will be asked by Windows if you want to open or save the file.



3. Click Open. The document opens for your review.

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Importing Accounts and Contacts

Use the Import wizard to import account and contact records from other applications like ACT!, GoldMine, salesforce.com, and Outlook. The wizard enables you to map imported records to your existing account and contact data record format.

✔ **Only users with import privileges can carry out this function.** Go to Setup/Roles and click the Edit icon  for the user type to which you want to assign import privileges. In the Edit Role window, scroll down to the Setup area and activate the *Import Accounts and Contacts* check box.

To import contact records:

1. Click the Setup tab to go to the Setup module.
2. From the Setup menu at left, select Import Accounts and Contacts.

The first page of the Import wizard opens.



3. Select the source file and mapping type (the originating program), then work your way through the wizard to import accounts and contacts. Instructions are included in the wizard.

✔ To print out instructions from the wizard, highlight the instructions, right click, then select Print. In the Print dialog box click Selection in the Page Range area, then click Print.

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