Role based UI: CRM Home Pages

Entersoft Business Suite® 4.0 | Entersoft CRM® 4.0

User Guide

Identity

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Contents

1. Introducing Entersoft dashboard elements

Entersoft Business Suite dashboards comprise of a variety of UI objects; each object type is used in relation to the data or the information to be presented and can be interactive. The available Object Types are listed next.

1.1 Object Types

1.1.1 Charts

Charts (Image 1) are used mainly for presentation purposes. In addition, charts can be used as interactive objects, i.e. by clicking on a data point of a chart the selected data point is highlighted and the system provides focused, detailed information that corresponds to the selected point; i.e. this action is essentially equivalent to visual and dynamic filtering. The filtering maybe applied either on the chart itself or on other objects of a particular dashboard. Colored labels (memo) and data labels (shown on data points) complement the presentation. An informative tooltip is also available when moving the mouse over charts. The presented information includes the values, groupings, totals etc. The available chart types are: Pie chart, bar chart, doughnut chart, stacked chart etc., and any meaningful combination (Image 2, Image 3, Image 4).

Image 1: Chart - an example

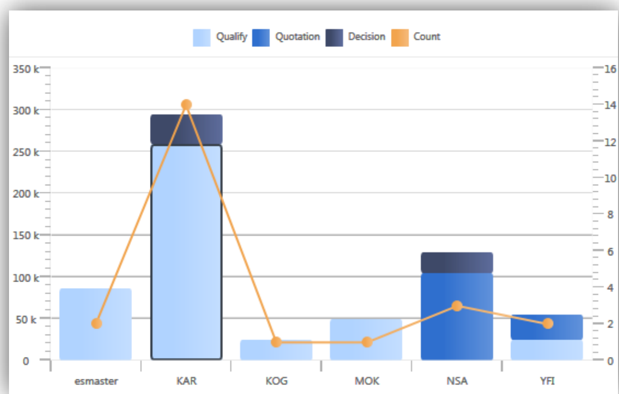


Image 2: Doughnut and Pie Chart examples

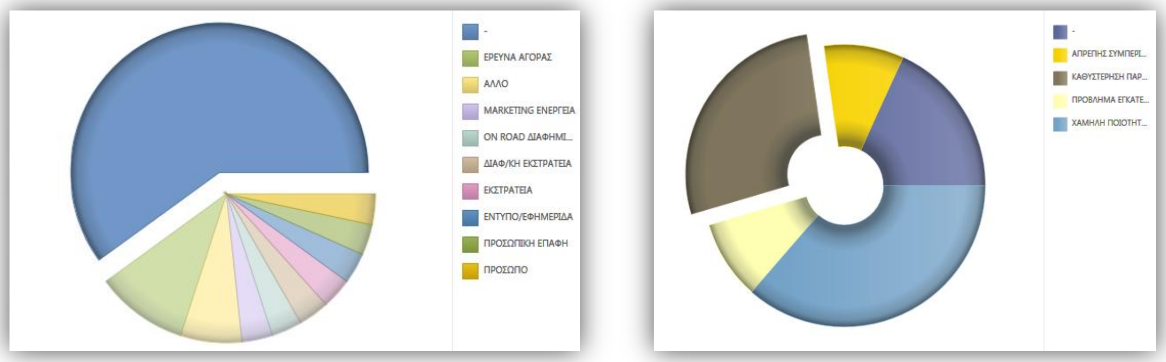


Image 3: A bar chart

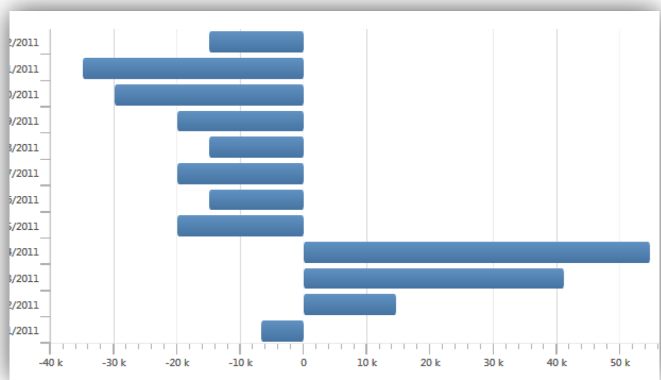
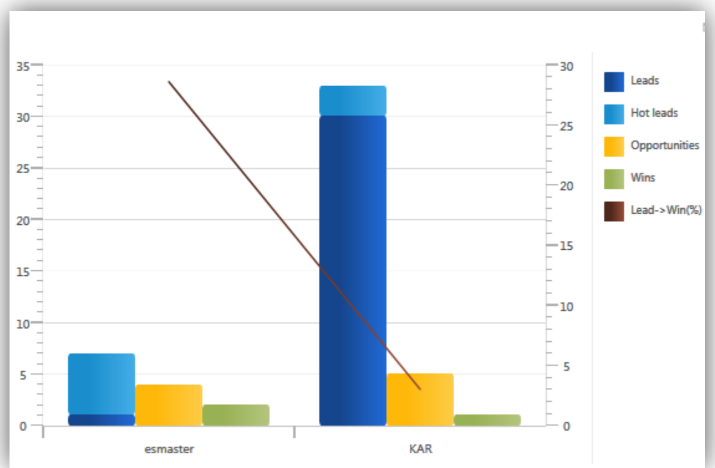
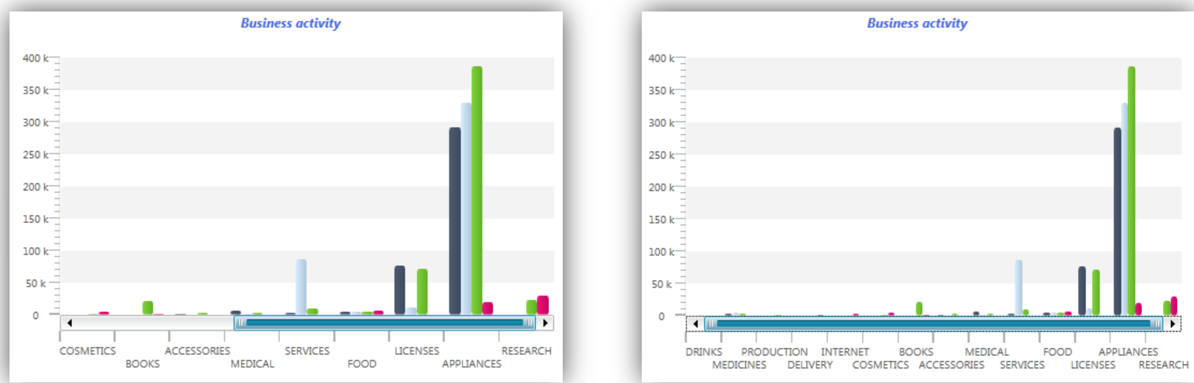


Image 4: Combined chart types



If an axis exceeds the predefined width of the Dashboard Object, a scrollbar will appear automatically. In order to ensure that all values will be presented at once, without the scrollbar, the user can use the mouse device to drag one end of the scrollbar to the full width of the dashboard object window (Image 5).

Image 5: Scrollbar | drag one end of the scrollbar to view all at once



1.1.2 Lists

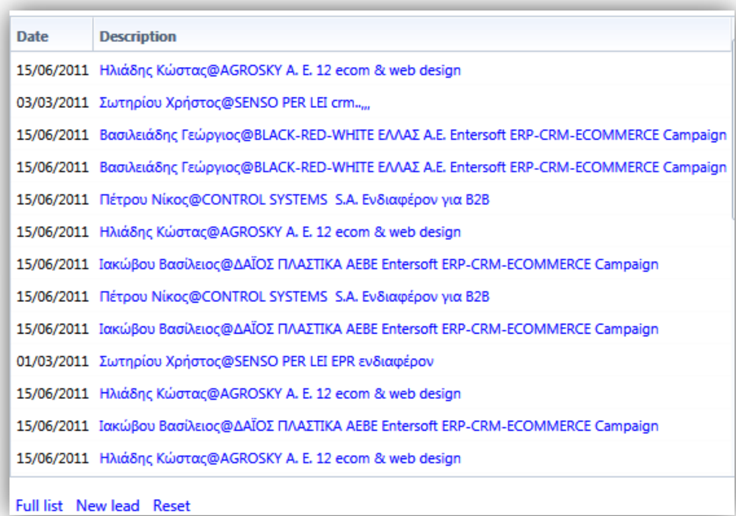
A list (Image 6) too is an object that can be used both for data presentation and interactively, i.e. (as described previously in 1.1.1) by clicking on a data row of a list the selected row is highlighted and the system provides focused, detailed information that corresponds to the selected row; i.e. this action too can be equivalent to visual and dynamic filtering. The filtering maybe applied either on the object itself (e.g. on an alternative view) or on other objects of a particular dashboard. Underlined data in blue denote a link to the UI form of the selected record (for viewing/editing). The list title is either predefined (static) or it is formulated dynamically, depending on the applied filters. Sorting functionality is also available by clicking on the column title.

1.1.3 Action links

Action links provide users with additional functionality and accessibility. The combination of (a) interactive presentation of information and (b) action links provides the basis for informative and prompt response to any developments.

- In the context of a list (Image 6), the functionality commonly provided by action links is access to the corresponding full list and new record creation.
- In the broader context of a particular dashboard, action links are commonly used as predefined filters that are applied to all of the objects contained in the particular dashboard.
- Action links can also be used in order to provide connections to the operational environment of a dashboard (Image 7). I.e. action links are incorporated in dashboards to represent workflows, to place a dashboard in the context of a workflow.

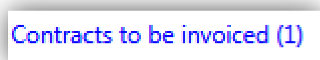
Image 6: A list and the corresponding action links



Date	Description
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
03/03/2011	Σωτηρίου Χρήστος@SENSO PER LEI crm..,,,
15/06/2011	Βασιλειάδης Γεώργιος@BLACK-RED-WHITE ΕΛΛΑΣ A.E. Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Βασιλειάδης Γεώργιος@BLACK-RED-WHITE ΕΛΛΑΣ A.E. Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Πέτρου Νίκος@CONTROL SYSTEMS S.A. Ενδιαφέρον για B2B
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Πέτρου Νίκος@CONTROL SYSTEMS S.A. Ενδιαφέρον για B2B
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
01/03/2011	Σωτηρίου Χρήστος@SENSO PER LEI EPR ενδιαφέρον
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design
15/06/2011	Ιακώβου Βασίλειος@ΔΑΪΟΣ ΠΛΑΣΤΙΚΑ ΑΕΒΕ Entersoft ERP-CRM-ECOMMERCE Campaign
15/06/2011	Ηλιάδης Κώστας@AGROSKY A. E. 12 ecom & web design

Full list New lead Reset

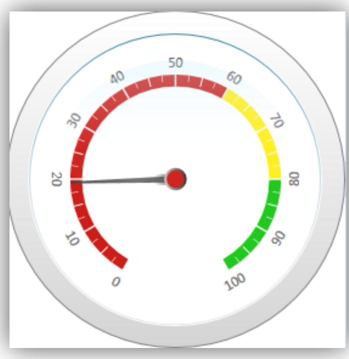
Image 7: Action link - connection to the operational environment



1.1.4 Indicators - gauges

Indicators present a single value (usually a percentage) which represents a performance measurement in relation to a colored scale that designates a poor (in red), average (in yellow), or high (in green) performance. The indicator may be dynamically filtered by other objects in a dashboard.

Image 8: Indicators - Gauges



1.1.5 Scorecards

Scorecards present groups of KPIs. Each group contains indicators that are assigned with a particular weight. This weight is used for calculating the scorecard results. Scorecards provide a concise overview of company activity performance.

Image 9: A scorecard

	Actual price	Target	Weight	Score
Financial			60	8.03%
ROI	794.72	12,400.00	40	6.41%
Revenue	12,973.50	200,000.00	30	6.49%
Cost	1,450.00	320.00	30	11.72%
Effectiveness			40	
Lead->Win	50.00	100.00	30	50.00%
Audience to win conversion rate			30	
Lead->Opportunity	100.00	100.00	15	100.00%
Audience to response conversion rate		100.00	15	

1.1.6 Map

A map shows the analysis of geographical related data. The analysis can be grouped by geographical region, district, city and a specific longitude and latitude. The data can be analyzed in two dimensions using a balloon. The bubble radius is proportional to the first dimension. The color of the bubble denotes the second dimension. The color dimension is used to represent the performance of the key figure presented by the diameter of the bubble.

Image 10: A map object on a dashboard

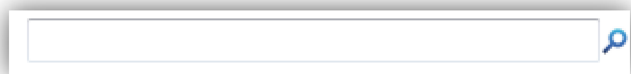
1.1.7 Web browser

A Web browser is available on selected dashboards for direct access to online information.

1.1.8 Search

Search functionality within a Dashboard. The search is effective on Lists and, specifically, the visible information in list records.

Image 11: Search



1.2 Basic functionality

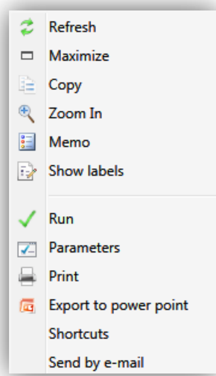
The basic functionality for using Entersoft Business Suite dashboards includes is available on the right-click menu. As shown in Image 12, the available actions are grouped in two main sets. The first group refers to the object of focus, and the second one refers to the dashboard as a whole.

1.2.1 Per Object

The following actions are available:

- **Refresh**: Refreshes the data of the selected object.
- **Maximize**: Maximizes the window that contains the selected object.
- **Copy**: Captures the selected object as an image.
- **Zoom in**: Available in Charts only. Zooms in the displayed data for detailed viewing. When selected, it is replaced by the corresponding **Zoom out** action.
- **Memo**: Available in Charts only. Shows / Hides the chart memo (i.e. the colored labels shown on the chart margin).
- **Show/Hide labels**: Available in Charts only. Displays or hides the data labels that correspond to the Y axis.

Image 12: Right click menu



1.2.2 Per dashboard

The following actions are available:

- **Run**: The dashboard is executed again.
- **Parameters**: Displays the parameter panel. The menu action is available only when parameters exist. In general, a dashboard can be either auto-executable or the user might be required to execute it. When a dashboard is auto-executable, then the parameters panel is hidden; else, the panel is minimized immediately after execution. The parameters panel can be (un-)pinned ().
- **Print**: The print dialogue is displayed. There a particular object can be sent to printer, the page setup properties can be adjusted. Pint preview is also available.
- **Export to PowerPoint**: This action automatically creates a PowerPoint presentation with the selected Objects (titled).
- **Shortcuts**: Creates a shortcut on the Shortcut list.
- **Send by e-mail**: Creates a new e-mail within the ES application environment; the e-mail body contains the dashboard objects.

2. Sales

Entersoft CRM® includes a series of interactive **Home Pages** which aim to substantially assist Salespeople to effectively manage their tasks and perform Sales Pipeline Analysis.

Pipeline Analysis is a real time analysis; guaranteeing, thus, secure, accurate and prompt decision making throughout a sales life cycle. Pipeline Analysis and Management include dashboards that are related to Sales forecasting and, moreover, to Sales Life Cycle performance.

The available home pages are listed below:

- Sales Home Page
- Leads
- Opportunities
- Pipeline by closing date
- Pipeline analysis to Target
- Pending Transactions
- My insight

The focus is the logged-in sales representative and, therefore, the home pages provide personalized information.

2.1 Sales Home Page

The "Sales Home Page" (Image 13) is an interactive, auto-executed page that provides essential information on the activities/appointments assigned to the particular sales representative. The page comprises of three sub-pages which are accessible by the corresponding buttons on the top of the page. The first, main page contains the following objects:

Interactive	✓
Auto-executed	✓
Informative Tooltips	✓

Current activities

Two alternative views are available:

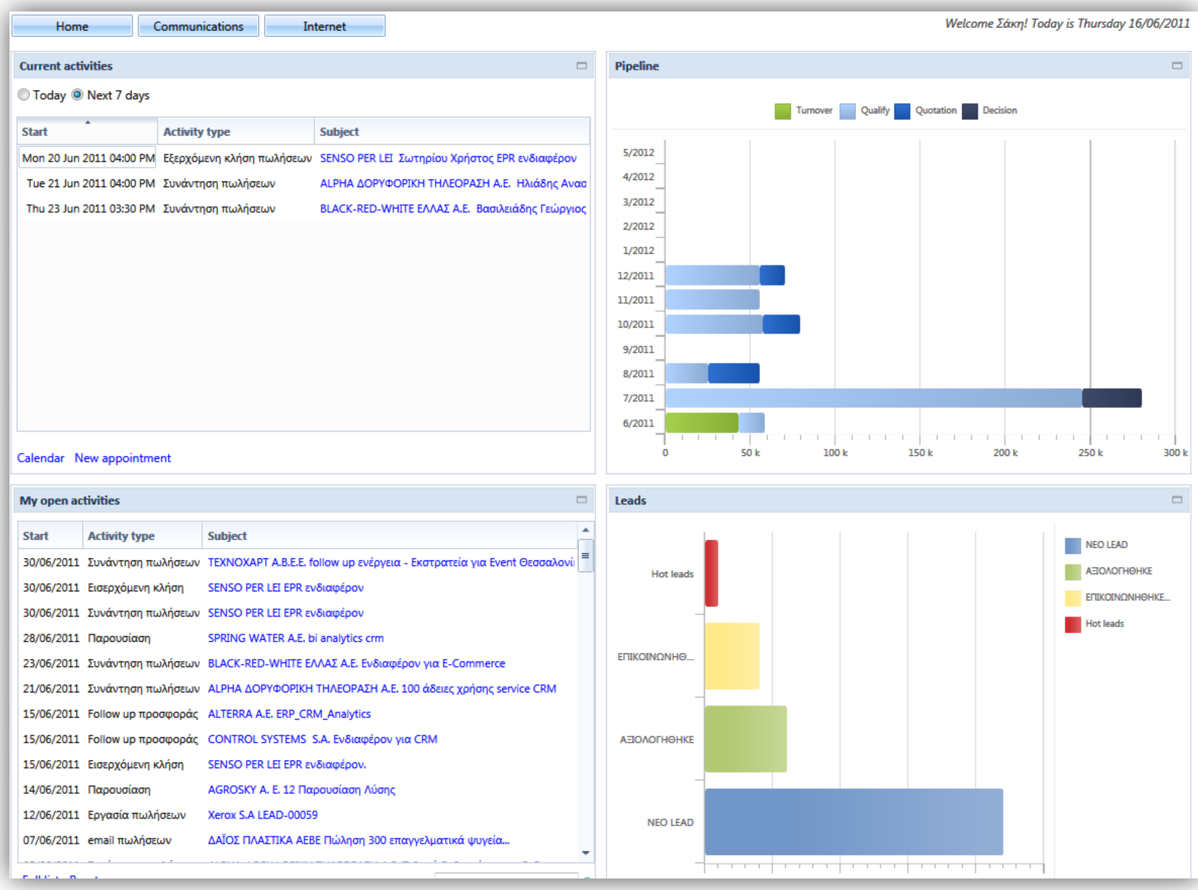
- **Today**: The activities and appointments scheduled for today.
- **Next 7 days**: The activities and appointments scheduled for the next seven days, starting from tomorrow.

By clicking on the link, which is available in the "Description" column at row level, the particular activity/appointment can be accessed for editing.

By clicking on anywhere else on a row, the location of the activity/appointment is shown on the map. Both Google® and Microsoft® maps are available.

A new appointment can be scheduled directly by clicking on the "New appointment" link. The "Calendar" link provides access to the logged-in sales representative's personal calendar.

Image 13: Sales Home Page



My open activities

Here, the open activities are presented. By clicking on the link, which is available in the "Description" column at row level, the particular activity/appointment can be accessed for editing. The "full list" of open activities is accessible through the corresponding link on the bottom of the list. The "reset" command removes any applied filters.

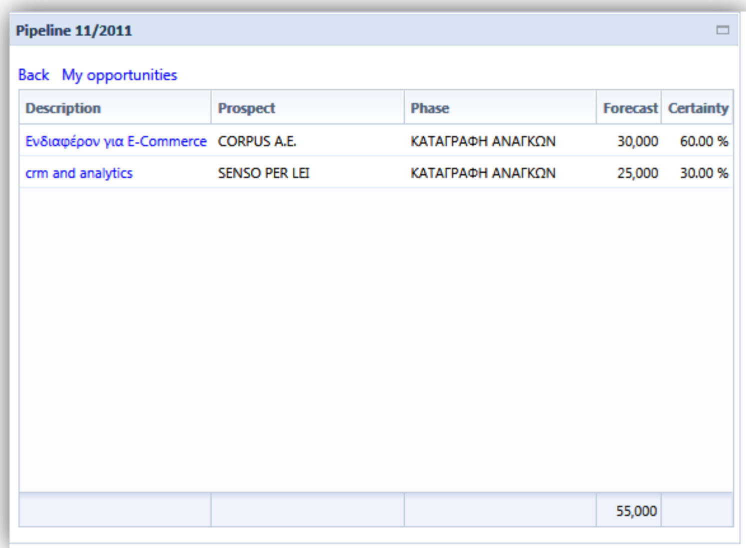
Pipeline

Sales forecasting information is presented on this graph (current year data). The Pipeline Analysis data are presented both per *month* and per *sales phase* (i.e. Qualify, Quotation, and Decision).

By clicking on any point on the bar chart, the system provides focused, detailed information that corresponds to the selected point; i.e. clicking on graph bars is essentially equivalent to visual and dynamic filtering. An informative tooltip is also available when moving the mouse over bars.

When on the detailed list (Image 14), the user can either access the Opportunities dashboard (by simply selecting the corresponding link) or return to the previous graph. Furthermore, by clicking on a Lead line, the user is presented with his/her open activities (in "My Open Activities" object).

Image 14: Pipeline | Focused view


Pipeline 11/2011

Back My opportunities

Description	Prospect	Phase	Forecast	Certainty
Ενδιαφέρον για E-Commerce	CORPUS A.E.	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	30,000	60.00 %
crm and analytics	SENSO PER LEI	ΚΑΤΑΓΡΑΦΗ ΑΝΑΓΚΩΝ	25,000	30.00 %
			55,000	

Leads

The chart presents any open leads (per status) and, additionally, any Hot Leads. As described previously in the context of the "Pipeline" chart, by clicking on any point of the bar charts, the system provides focused, detailed information that corresponds to the selected point; i.e. clicking on chart bars is essentially equivalent to visual and dynamic filtering. An informative tooltip is also available when moving the mouse over chart bars. When on the detailed list, the sales representative can either access the "My Leads" dashboard (by simply selecting the corresponding link) or return to the previous chart. On the second page of the dashboard, the following objects are available:

Inbox

The "Inbox" object presents a list of the user's incoming e-mails as recorded in the current year. By clicking on the "Description" link the particular e-mail can be accessed. The "Inbox" command provides access to the detailed list.

The user can additionally create and send a new e-mail ("New e-mail" command at the bottom of the Inbox List).

Sent emails

The "Sent" object is a list of the user's outgoing e-mails as recorded in the current year. By clicking on the "Description" link the particular e-mail can be accessed. The "Sent e-mails" command provides access to the detailed list.

Draft e-mails can be accesses through the "Draft e-mails" command.

Views

The "Views" object is a list of shortcuts to the commonly accessed lists. These are: "Contacts", "Contact Birthdays", "Contact Name Days", "Mass communications", and "My clients".

Recent communications

The "Recent Communications" object includes a list of the communications that occurred in the past couple of months. The pie chart presents on the right the recent communications per type. By clicking on a data point of the pie chart, the Recent Communication list data are filtered by the selected type. An informative tooltip is also available.

Internet Access

On the third page of the dashboard, a web browser is available for direct access to online information.

2.2 Leads

The "Leads" home page (Image 15) is an interactive, auto-executed page that provides operational functionality and essential information on the Leads of the logged-in sales representative. Lead Start Period is available as a parameter[1]; the default parameter value is "Anything".

The page comprises of the following objects:

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

Leads by Status / Quality / Source

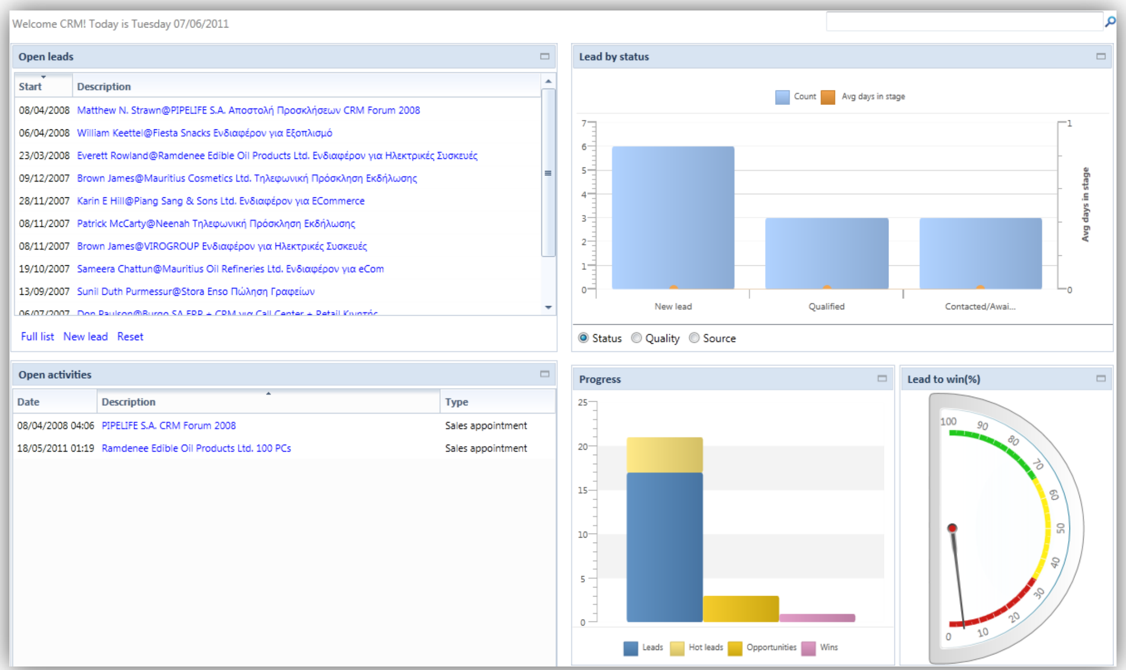
Three alternative views are available, one per grouping factor. Depending on the grouping factor a different chart type is used for the best possible presentation of the related information.

- **Leads by Status**: This bar chart presents the number of Leads per Lead Status. At the same time, the average number of days per Lead status is presented.
- **Leads by Quality**: This doughnut chart presents the number of Leads per Lead Quality.
- **Leads by Source**: This pie chart presents the number of Leads per Source.

By clicking on a data point on any of the alternative charts, the "Open Leads", presented next, are filtered automatically. Note that by applying filters to "Open Leads" the related Open Tasks are also filtered.

[1] To display Parameters on the top of a Dashboard, go to the right click menu on a dashboard and select the "Parameters" menu; If not available, no parameters are defined for the particular dashboard.

Image 15: Leads



Open Leads

This list presents (as implied by its title) any Open Leads. By clicking on the link in the "Description" column, the particular lead can be accessed for editing or viewing. By clicking on anywhere else on a row, the selected lead tasks are displayed on the list: "My Leads - Open Tasks" which is described next. The "full list" of open leads is accessible through the corresponding link on the bottom of the list. Additionally, the "New Lead" command is provided.

My Open Leads - Open Tasks

Here, the Open Tasks of the above selected Leads are presented. By clicking on the "Description" link the particular task can be accessed for editing or viewing.

Progress

This bar chart presents the Lead progress based on the selected period. This item includes also the number of Leads, the number of Hot Leads, the opportunities and the wins as well.

Lead to win (%)

The "Lead to Win" conversion rate (%) is presented here.

2.3 Opportunities

The "Opportunities" home page (Image 16) is an interactive, auto-executed page that provides operational functionality and essential information on the Opportunities of the logged-in sales representative. Opportunity Closing Period (Analysis Period) is the available, definable parameter; the default parameter value is "3 months" (visible on the top of the dashboard).

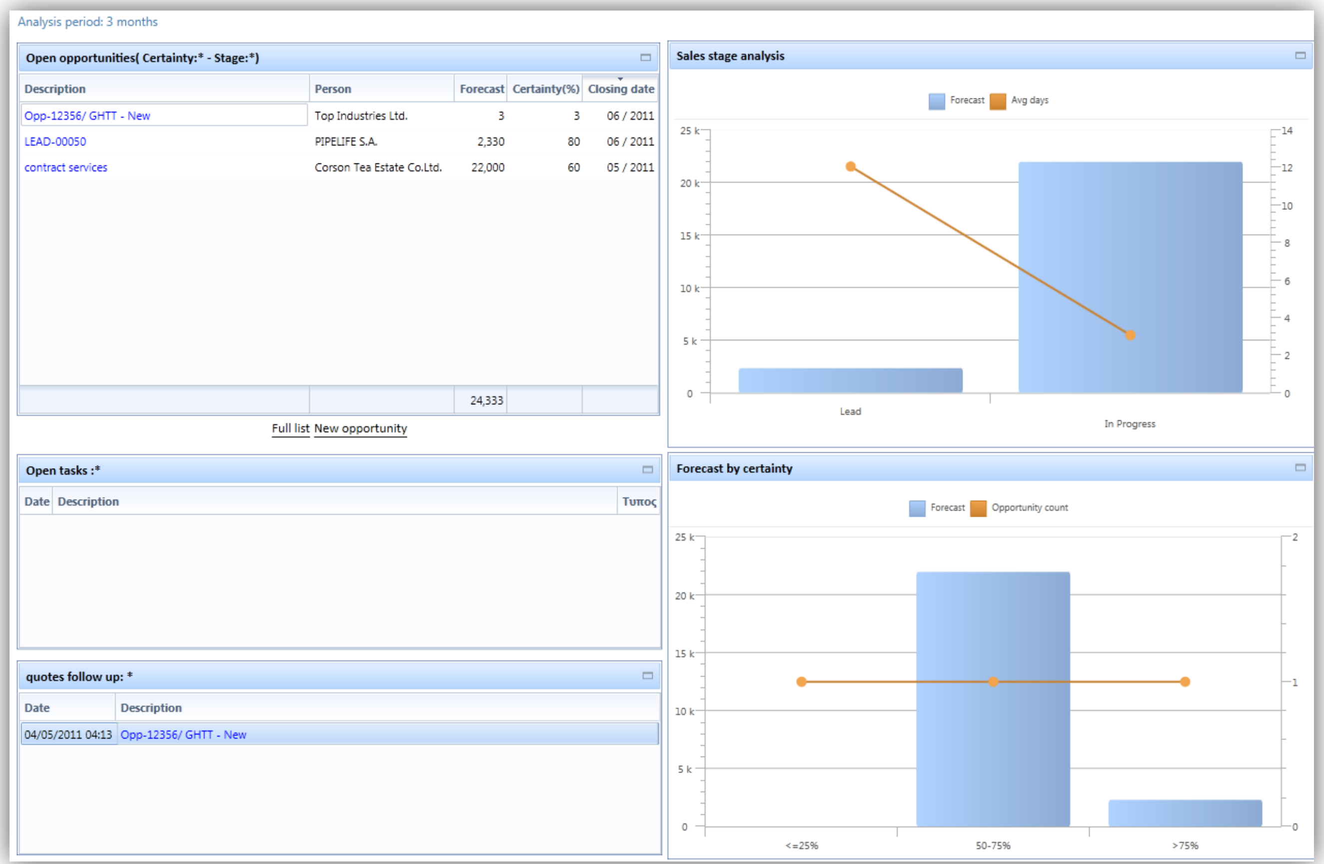
Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The page comprises of the following objects:

Sales Stage Analysis

This chart presents the Revenue Forecast per Sales Stage. At the same time, the average duration (in days) of an opportunity while open is presented, per sales stage. By clicking on a data point on the chart, the "Open Opportunities" (described next) listed on the left are filtered automatically.

Image 16: Opportunities



Forecast by Certainty

This chart presents the Revenue Forecast per Certainty Percentage and number of the opportunities. By clicking on a data point on the chart, the corresponding "Open Opportunities" (described next) are automatically filtered.

Hence, both of these two charts can be used as filters for the "Open Opportunities" List. Note that by filtering "Open Opportunities", the related "Open Tasks" and "Quotes - Follow ups" are also filtered.

Open Opportunities

This list presents the Open Opportunities. By clicking on the link in the "Description" column, the particular opportunity can be accessed for editing or viewing. The following data are presented for each listed opportunity: Person (Prospect Customer), Certainty%, Revenue Forecast, and Closing date. The commands: "Full List" and "New Opportunity" are available. By clicking on a row, the data displayed on the following two lists are automatically filtered.

Open Tasks

The open tasks for the previously selected (or filtered) opportunities are listed here. By clicking on the link in the "Description" column, the particular task can be accessed for editing or viewing.

Quotes Follow Up

The required follow ups of any related Quotes are listed here. By clicking on the link in the "Description" column, the particular follow up can be accessed for editing or viewing.

2.4 Pipeline by closing date

This interactive dashboard (Image 17) is decisive for the monthly Pipeline management and analysis. It is based on the periodical data of open opportunities. Specifically, on the:

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

- Revenue Forecast
- Forecasted Closing Date
- Sales Stage

Two parameters are available:

- Opportunity Closing date
- Weighted Revenue Forecast

The chart provides at a glance some essential information about:

- The opportunities that are in Decision Stage and about to be completed in the current period.

- The Forecasted Revenue for the subsequent months per analysis stage.

The available objects are:

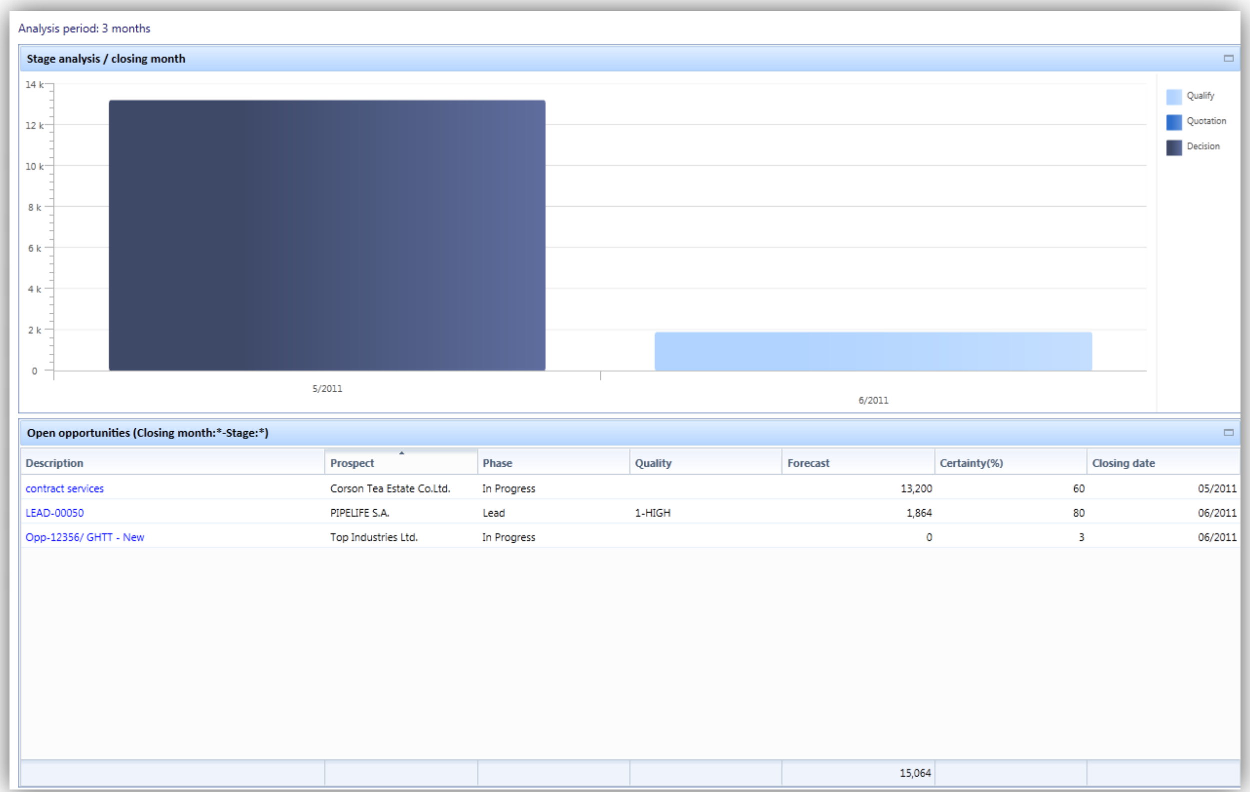
Sales Stage Analysis

By clicking on a data point on the chart, the corresponding "Open Opportunities" (described next) are automatically filtered.

Open Opportunities

This list presents the Open Opportunities. By clicking on the link in the "Description" column, the particular opportunity can be accessed for editing or viewing.

Image 17: Pipeline by closing date



2.5 Pipeline analysis to Target

This dashboard (Image 18) supports Sales Pipeline Analysis in relation to the Target set by the Sales Manager. For its purposes, the following information and data are used:

- Pipeline Forecasted Revenue
- Accomplished Turnover
- Target set by the Sales Manager (in Sales Budget)

Two parameters are available:

- Opportunity Closing date (default: From this year and up to 5 quarters after)
- Weighted Revenue Forecast

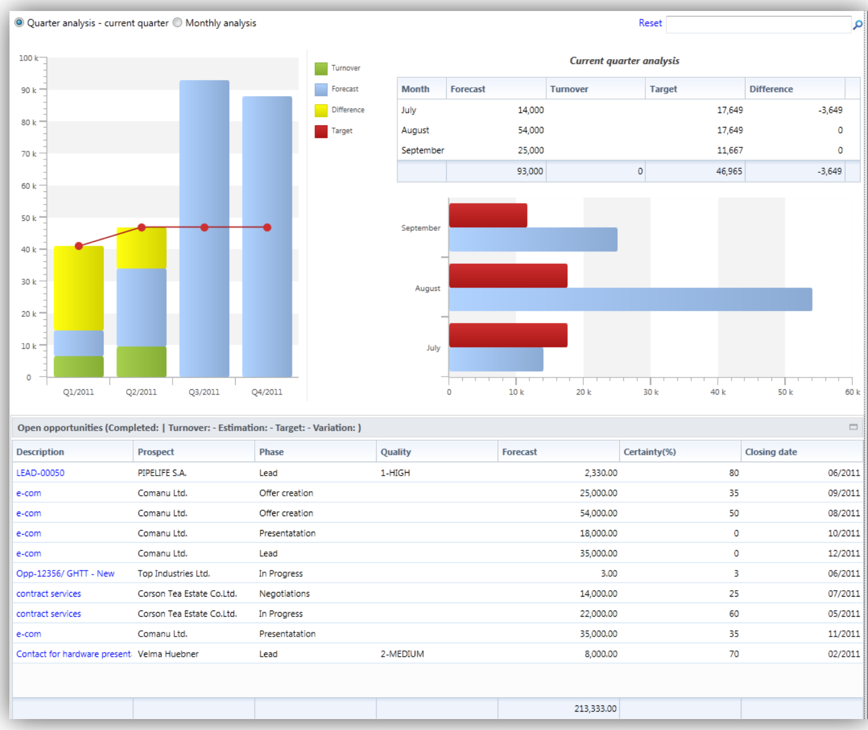
Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The chart on the upper left section of the dashboard presents the Pipeline Analysis per Quarter while the chart on the right focuses on the current Quarter. An alternative view to both of these charts is also available by selecting "Monthly Analysis".

The variance from the target is calculated as follows: **Variance = Target - (Turnover + Forecasted Revenue)**.

By clicking on a data point on the first chart, the "Opportunities" are filtered automatically. By clicking on the link in the "Description" column, the particular opportunity can be accessed for editing or viewing.

Image 18: Pipeline analysis to Target



2.6 Pending Transactions

This auto-executed dashboard provides information and processing functionality on open quotations, open orders, invoices etc. One parameter is available; this of the issue date of the documents. The defaults parameter value is "Anything".

Parameters	✓
Auto-executed	✓

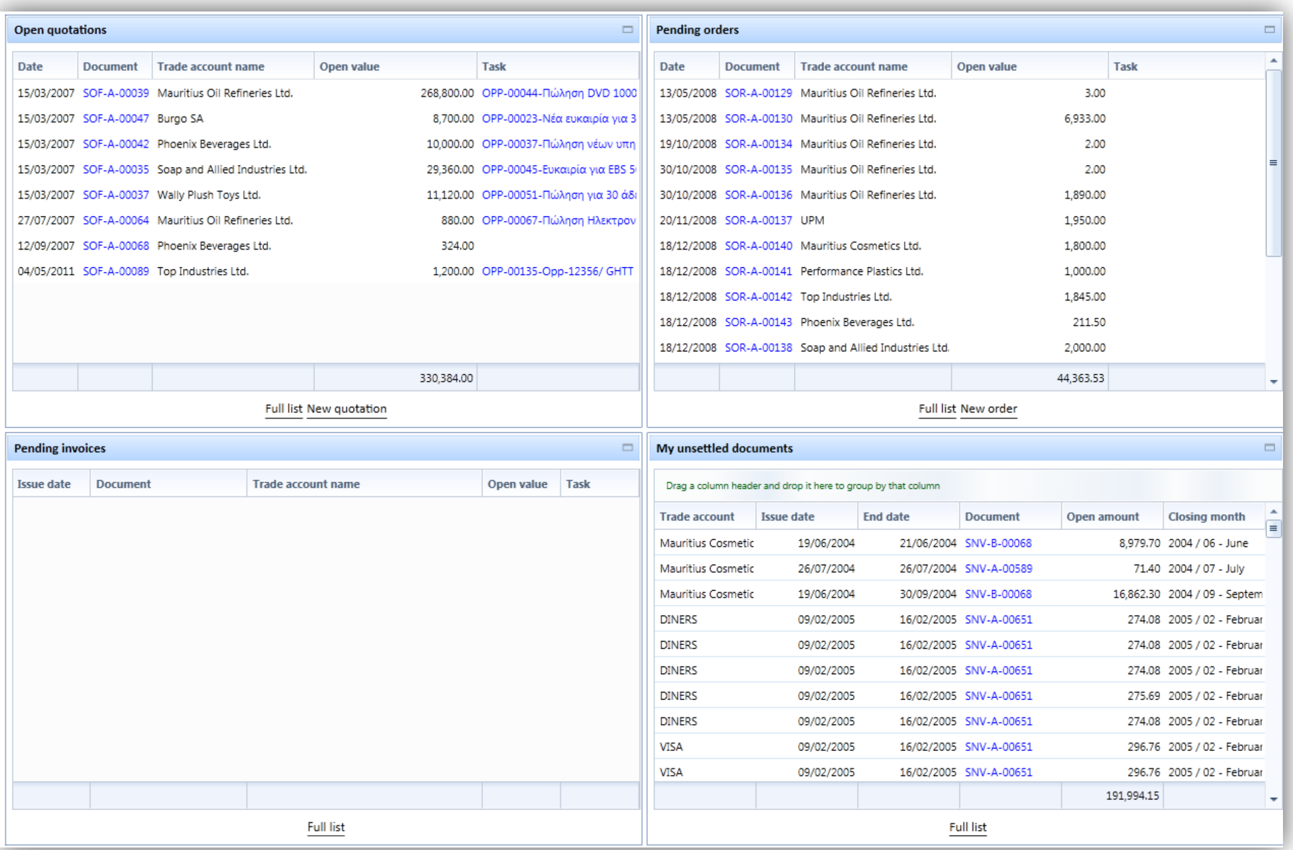
The page comprises of the following objects:

Open Quotations

The logged-in sales representative's Open Quotations are listed here. A particular Quotation is accessible by clicking on the corresponding link in the "Document" column. The following information is directly presented per Quotation: the "Trade Account", the "Open Value", and the related "Task". By clicking on a link in the Task column, it is possible to access the related task.

The commands "Full list" and "New Quotation" are available.

Image 19: Pending transactions



Pending Orders

This list presents any Pending Orders; these can be accessed for editing or viewing by clicking on the corresponding link, in the "Document" column. The following information is directly presented per Order: the "Trade Account", the "Open Value", and the related "Task". By clicking on a link in the Task column, it is possible to access the related task.

The commands "Full list" and "New Order" are available.

Pending Invoices

Here, the Pending Invoices are listed, each of which is accessible by clicking on the link in the "Document" column. Similarly to the lists described above, the following information is directly presented per Invoice: the "Trade Account", the "Open Value", and the related "Task". By clicking on a link in the Task column, it is possible to access the related task. The "Full list" command is available.

My Unsettled Documents

The last object of this dashboard is a list of the Unsettled Documents, if any. The "Full list" command is available.

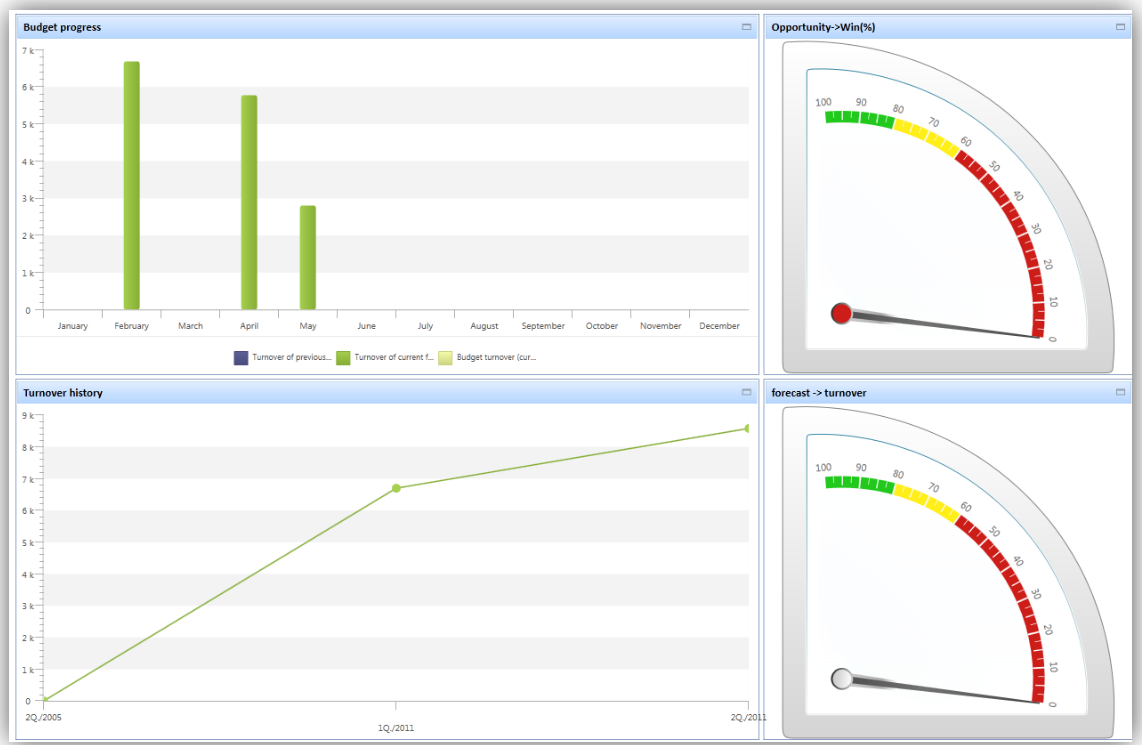
2.7 My insight

This dashboard provides feedback on the performance of the logged-in sales representative in relation to the target set by the Sales Manager, the pipeline performance, and information on the accomplished turnover history. The available charts / indicators are:

Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

- Budget Progress (Turnover to Target monthly analysis)
- Opportunity to win rate (%)
- Forecasted Revenue to Turnover
- Turnover history (per Quarter)

Image 20: My insight



3. Customer Care

Entersoft CRM® includes a series of interactive **Home Pages** which aim to substantially assist service representatives to effectively manage their tasks and cases. The available home pages are listed below:

- Cases
- Service in house
- Service on site
- Complaints

The focus is the logged-in service representative and, therefore, the home pages provide personalized information.

3.1 Cases

The "Cases" Home Page (Image 21) is an interactive, auto-executed page that provides essential information on the cases assigned to the logged-in service representative. One parameter is available: the case start period; the default parameter value is "Anything".

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The "Cases" dashboard comprises of the following objects:

Priority

Two alternative views are available. Depending on the grouping factor a different chart type is used for the best possible presentation of the related information.

- **Ageing**: The open cases based on the service ageing scale and grouped by priority are presented here.
- **Count by priority**: The number of open cases per priority is presented in this pie chart.

By clicking on a data point on any of the alternative charts, the "Open Cases", presented next, are filtered automatically. Note that by applying filters to "Open Cases" the related Open Tasks are also filtered.

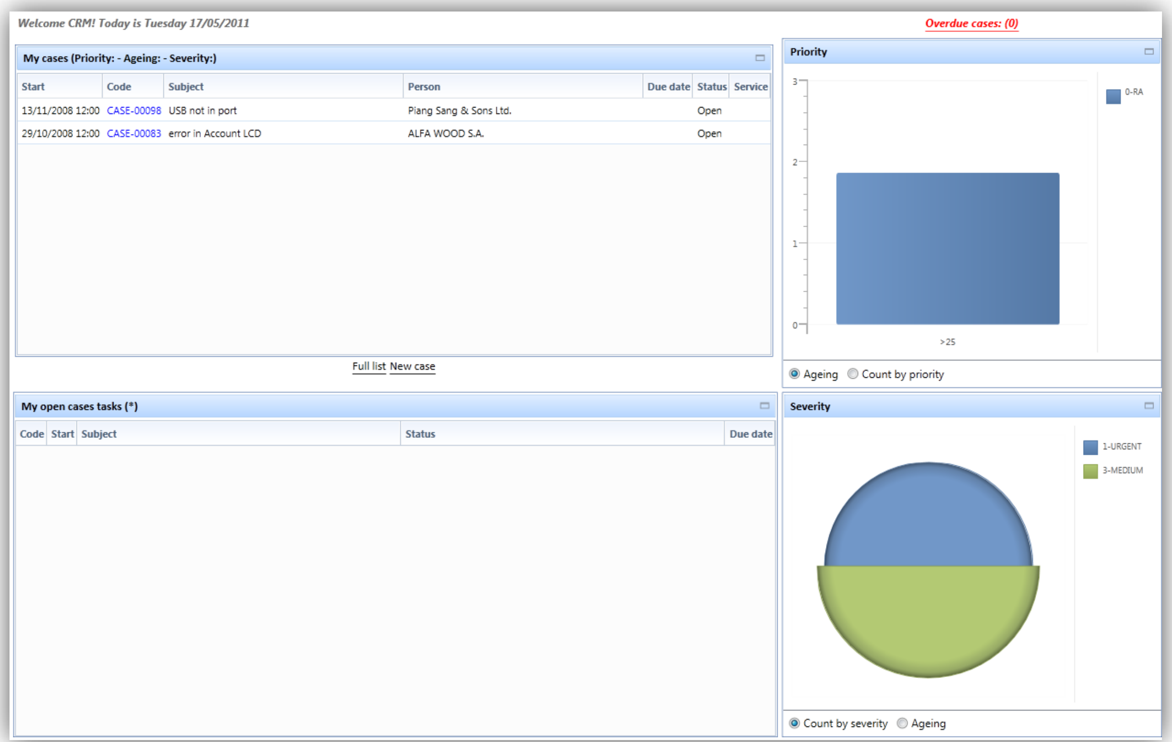
Severity

Two alternative views are available:

- **Count by Severity**: The number of open cases per severity is presented in this pie chart.
- **Ageing**: The open cases based on the ageing scale and grouped by severity are presented here.

By clicking on a data point on any of the alternative charts, the "Open Cases", presented next, are filtered automatically. Note that by applying filters to "Open Cases" the related Open Tasks are also filtered.

Image 21: Cases



My Cases

This object provides us personalized information and functionality for processing our open cases. By clicking on the link, which is available in the "Code" column at row level, the particular case can be accessed for viewing and editing. A new case can be created by clicking on the "New case" link. The "full list" command is also available. By clicking on a row, the data displayed on the following list are automatically filtered.

My Cases - Related Open Tasks

The open tasks related to the previously selected open cases are listed here.

Overdue Cases

Note that on the right top of the dashboard, the "Overdue Cases" action link is available; by clicking on this link the presented cases are limited to the overdue ones.

3.2 Service in house

The "Service in house" Home Page (Image 22) is an interactive, auto-executed page that provides essential information on the Service in house cases assigned to the logged-in service representative. One parameter is available: the case start period; the default parameter value is "Anything".

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The "Service in house" dashboard comprises of the following objects:

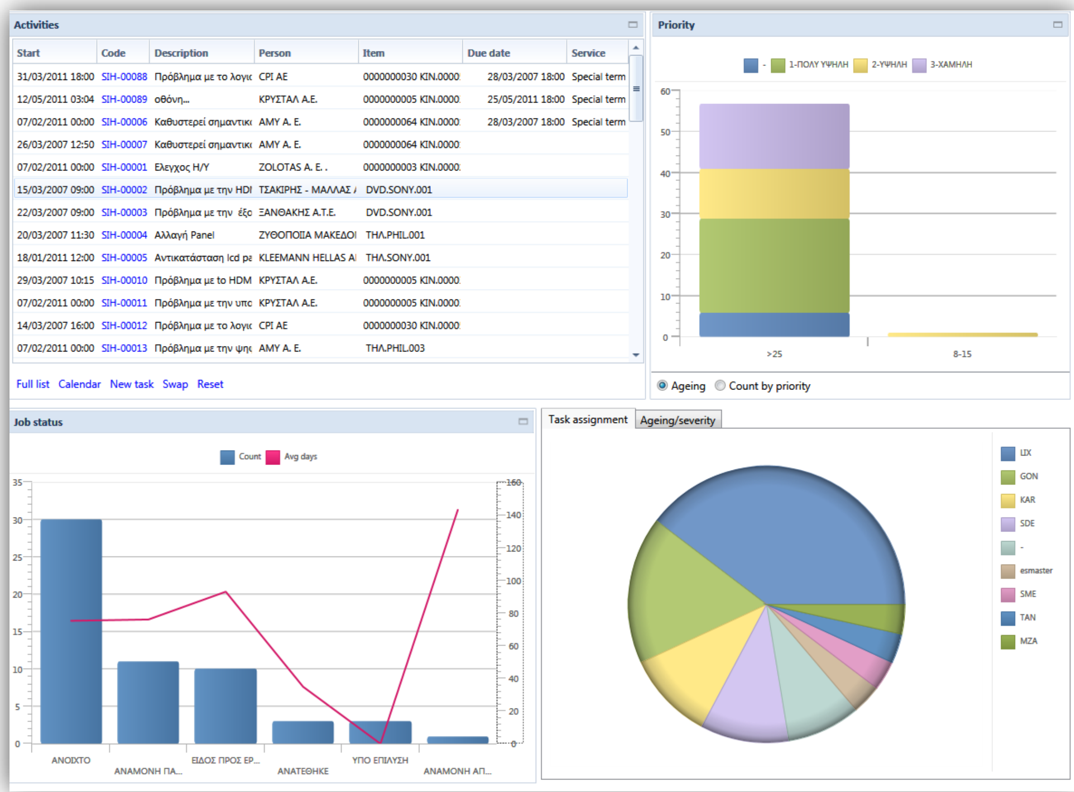
Priority

Two alternative views are available. Depending on the grouping factor a different chart type is used for the best possible presentation of the related information.

- **Ageing**: The open tasks based on the service ageing scale and grouped by priority are presented here.
- **Count by priority**: The number of open tasks per priority is presented in this pie chart.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Image 22: Service in house



Severity

Two alternative views are available:

- **Count by Severity**: The number of open tasks per severity is presented in this pie chart.
- **Ageing**: The open tasks based on the ageing scale and grouped by severity are presented here.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Status analysis

The number of tasks grouped by their status is presented in this chart. At the same time, the average number of days per task status is presented.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

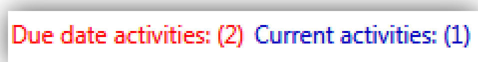
Open Activities

Here, the open service in house tasks are listed. By clicking on the link in the "Code" column, the task can be accessed for editing/viewing. The "Full list" command is available. The "Calendar" link provides access to the logged-in service representative's personal calendar.

Overdue Tasks / Current Tasks

Note that on the right top of the dashboard, the commands "Overdue tasks" and "Current activities" are available; by clicking on one of these links the presented tasks are limited only to the overdue/current ones.

Image 23: Action links - Overdue Tasks / Current Tasks



3.3 Service on site

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The "Service on site" Home Page (Image 24) is an interactive, auto-executed page that provides essential information on the Service in house cases assigned to the logged-in service representative. One parameter is available: the service task start period; the default parameter value is "Anything".

The "Service on house" dashboard comprises of the following objects:

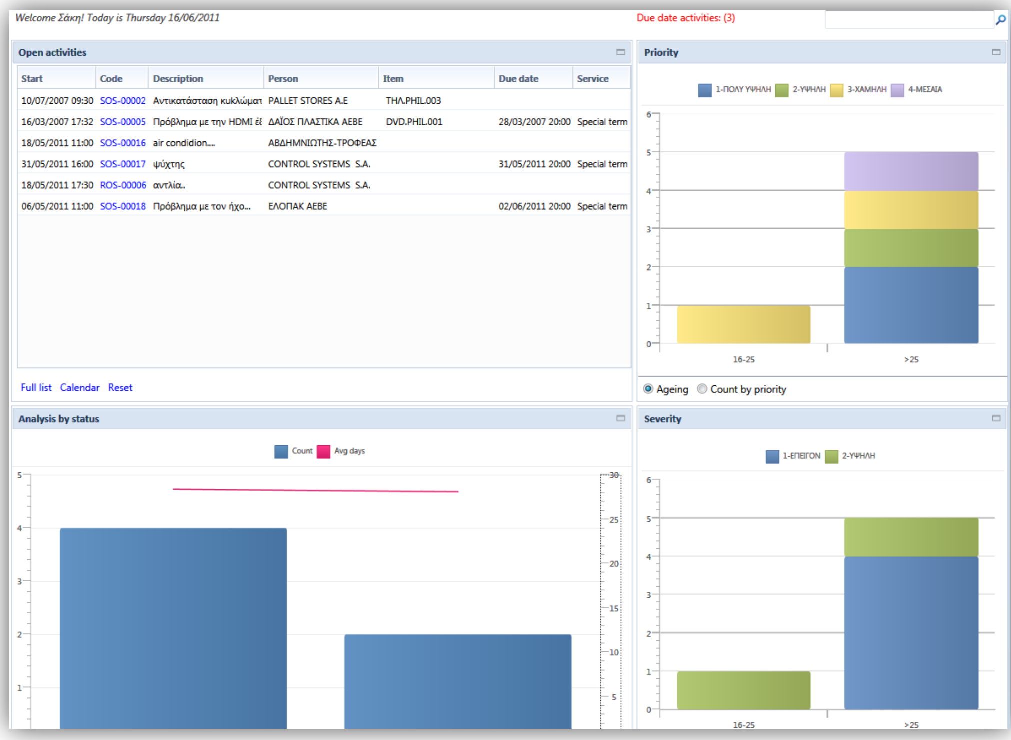
Priority

Two alternative views are available. Depending on the grouping factor a different chart type is used for the best possible presentation of the related information.

- **Ageing**: The open 'service on site' tasks based on the service ageing scale and grouped by priority are presented here.
- **Count by priority**: The number of open 'service on site' tasks per priority is presented in this pie chart.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Image 24: Service on site



Severity

Two alternative views are available:

- **Count by Severity**: The number of open 'service on site' tasks per severity is presented in this pie chart.
- **Ageing**: The open tasks based on the ageing scale and grouped by severity are presented here.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Status analysis

The number of tasks grouped by their status is presented in this chart. At the same time, the average number of days per task status is presented.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Open Tasks

Here, the open 'service on site' tasks are listed. By clicking on the link in the "Code" column, the task can be accessed for editing/viewing. The "Full list" command is available. The "Calendar" link provides access to the logged-in service representative's personal calendar.

Overdue Tasks

Note that on the right top of the dashboard, the commands "Overdue tasks" command is available; by clicking on this link the presented tasks are limited only to the overdue ones.

3.4 Complaints

The "Complaints" Home Page (Image 25Image 24) is an interactive, auto-executed page that provides essential information on the Complaints assigned for managing to the logged-in service representative. Two parameters are available: the complaint date (default parameter value is "Anything") and the branch (default parameter value is <null>, which is equivalent to all).

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The "Complaints" dashboard comprises of the following objects:

Complaints by Severity

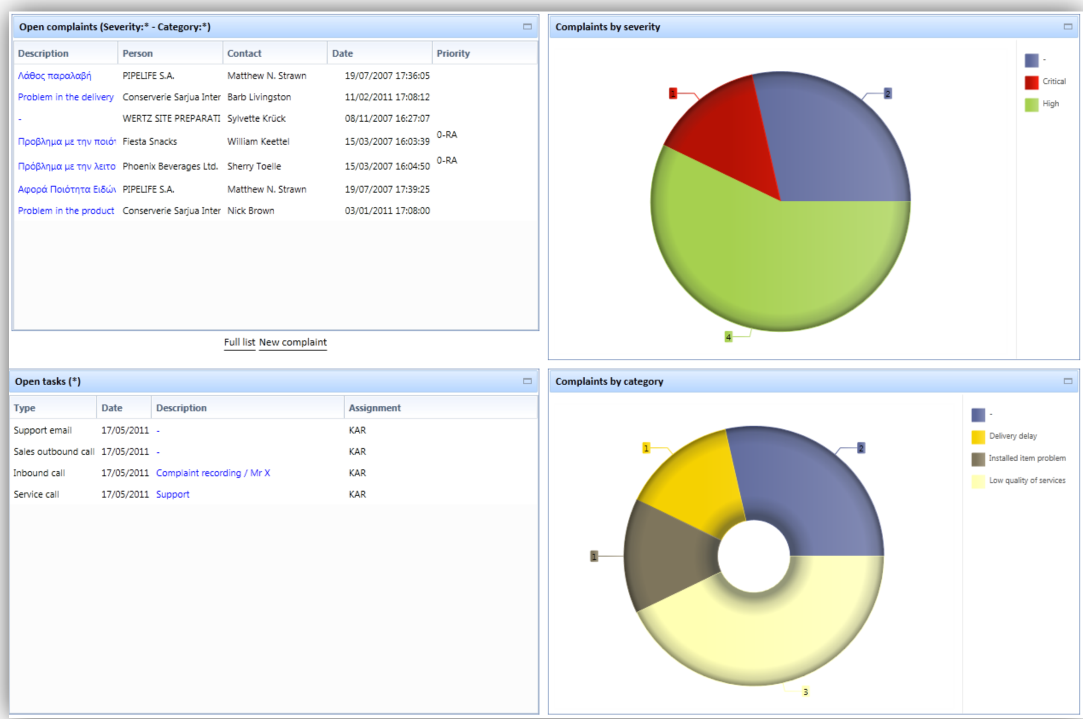
This pie chart presents the number of complaints by severity. By clicking on a data point on any of the alternative charts, the "Open Complaints", presented next, are filtered automatically. Note that by applying filters to "Open Complaints" the related Open Tasks are also filtered.

Complaints by Category

This pie chart presents the number of complaints by category. By clicking on a data point on any of the alternative charts, the "Open Complaints", presented next, are filtered automatically. Note that by applying filters to "Open Complaints" the related Open Tasks are also filtered.

By clicking on a data point on any of the alternative charts, the "Open Tasks", presented next, are filtered automatically.

Image 25: Complaints



Open Complaints

Here, the open complaints are listed. By clicking on the link in the "Description" column, the complaint can be accessed for editing/viewing. The commands "Full list" and "New complaint" are available. By clicking on anywhere else on a row, the related Open Tasks listed below are filtered.

Open Tasks

The open related subtasks of the above selected complaints are listed here. The following information is directly presented per Open Task: the" Task Type", the "Date", the "Description" (where, by clicking the corresponding, we can access the particular subtask for editing/viewing) and the "Assigned to".

4. Communications

All company's communications can be successfully managed by a single dashboard page which combines all the basic functionality required for inbound and outbound communications. This page aims mainly to substantially assist towards the effective management of secretarial tasks.

4.1 Communication Center

The "Communication Center" Home Page (Image 26) is an interactive, auto-executed page that provides essential information on the Company communications. Two communication types are supported: Calls and Emails.

The "Communication Center" dashboard comprises of the following objects:

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

Calls

This list provides us information and functionality for processing the Company calls. By clicking on the link, which is available in the "Description" column at row level, the particular call can be accessed for viewing and editing. A new call can be registered by clicking on the "New inbound call" link or "New outbound call". The following information is directly presented per call: the "Type of Call", the "Date", the "Person", and the (assigned to) "Representative".

Inbound e-mails

Here, the recent inbound e-mails are listed. By clicking on the link, which is available in the "Description" column at row level, the particular e-mail can be accessed. A new e-mail can be created by clicking on the "New e-mail" link. The "Inbox" command is also available.

Outbound e-mails

In this list, the recent outbound e-mails are presented. By clicking on the link, which is available in the "Description" column at row level, the particular e-mail can be accessed. The commands "Sent e-mails" and "Draft e-mails" are also available.

Internet Access

On the third page of the dashboard, a web browser is available for direct access to online information.

My open activities

This object provides information on the logged-in user's open activities. By clicking on the link in the "Description" column the particular activity can be accessed for viewing and editing.

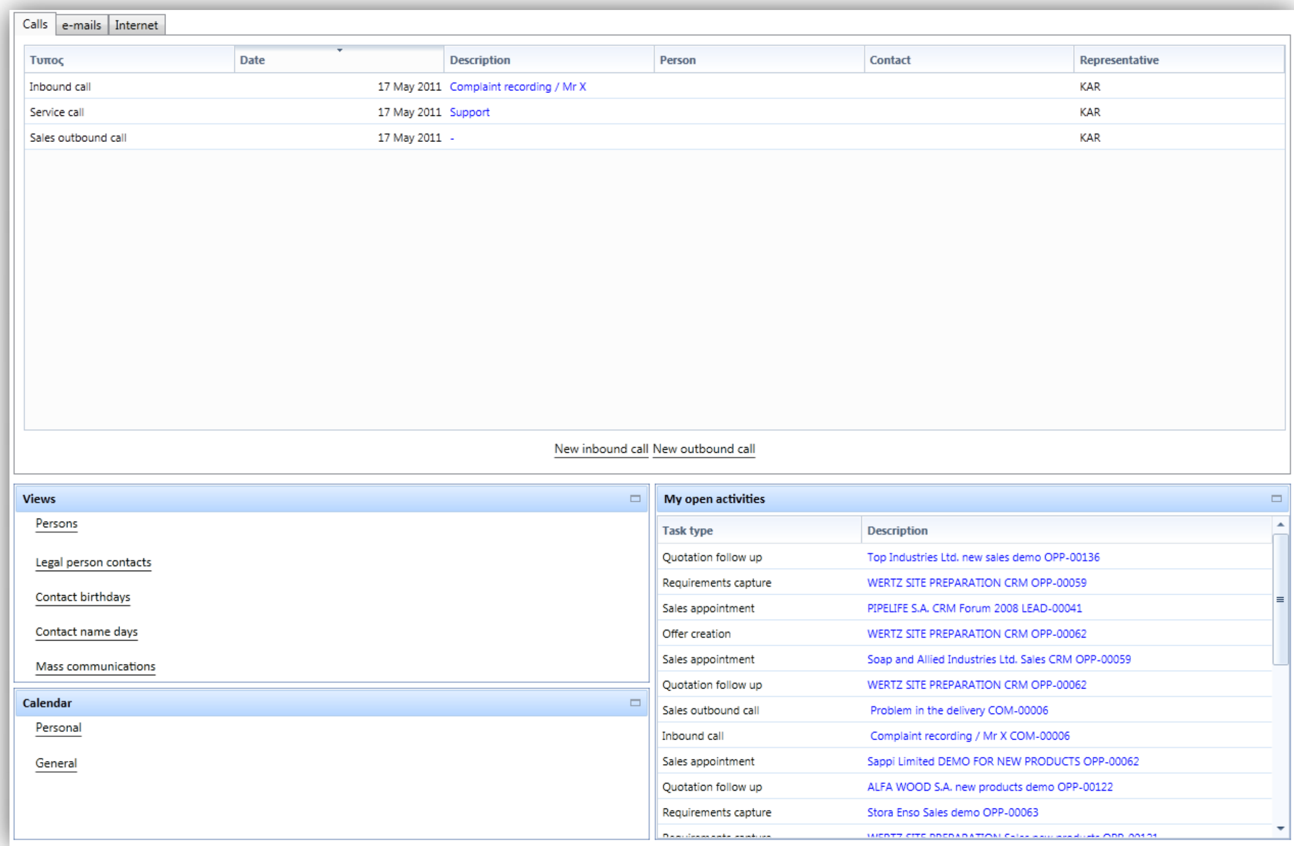
Views

The "Views" object is a list of shortcuts to the commonly accessed lists. These are: "Persons", "Legal person contacts", "Contact birthdays", "Contact Name Days", and "Mass communications".

Calendar

In the "Calendar" object access is provided either to the logged-in user's personal calendar or to the general company calendar.

Image 26: Communications Center



5. Service Contracts

The available home pages are listed below:

- Service Contracts
- Subscriptions

5.1 Service Contracts

"Service Contacts" Home Page (Image 27) is an interactive, auto-executed page that contributes to the effective management of contracts and contract terms and provides direct and dynamic information related to the distinctive characteristics of a contract's life cycle.

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

Two parameters are available: the end date (the default parameter value is "Today") and the renewal date (the default parameter value is "The end of the current month").

The "Service Contacts" dashboard comprises of the following objects:

Active contracts

This list provides us information and functionality for processing the Company's active contracts. By clicking on the link, which is available in the "Description" column at row level, the particular case can be accessed for viewing and editing. A new contract can be created by clicking on the "New contract" link. The "full list" command is also available. By clicking on a row, the data displayed in the "Contract Terms" list and the "Fixed charges / closed revenue" chart are automatically filtered.

Contract terms

The list of the Contract terms of the (selected) Active Contracts. By clicking on the link in the "Description" column at row level, the particular contract term can be accessed for viewing and editing. The "full list" command is also available.

Fixed charges / closed revenue

The chart presents the total value to be invoiced in comparison to the invoiced value on a monthly basis.

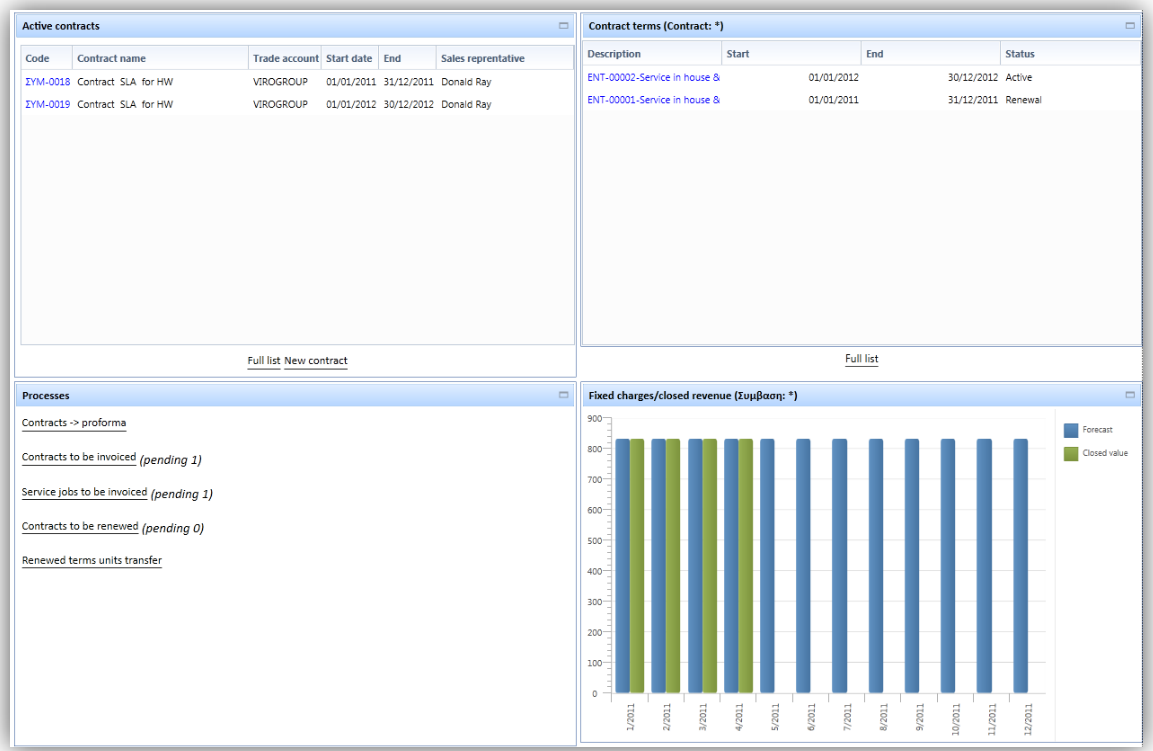
Processes

The "Processes" object provides a list of shortcuts that correspond to different stages of a service contract's life cycle:

- **Contracts → Proforma**: Link to the corresponding list. Next to the link, the number of the pending "Contracts → Proforma" is displayed, if any.

- **Contracts to be invoiced**: Link to the corresponding list. Next to the link, the number of the pending "Contracts to be invoiced" is displayed, if any.
- **Service jobs to be invoiced**: Link to the corresponding UI in order to create invoices for services in house and/or on site. Next to the link, the number of the pending "Service jobs to be invoiced" is displayed, if any.
- **Contracts to be renewed**: Link to the corresponding list. Next to the link, the number of the pending "Contracts to be renewed" is displayed, if any.
- **Renewed unit transfer terms**: Link to the corresponding list where subsequent actions are available. Next to the link, the number of the pending for unit transfer terms, if any.

Image 27: Service Contract Management



5.2 Subscriptions

"Subscriptions" Home Page is an interactive, auto-executed page. Two parameters are available: the end date (the default parameter value is "Anything") and the renewal date (the default parameter value is "from today and until two months from now").

Interactive	✓
Parameters	✓
Auto-executed	✓
Informative ToolTips	✓

The "Subscriptions" dashboard comprises of the following objects:

Active subscriptions

This list provides us information on the active subscriptions. The following information is directly available: the "Customer", the "End Date", the "Subscription Item", the Subscription "Status", and its "Value". By clicking on the link, which is available in the "Code" column at row level, the particular subscription can be accessed for viewing and editing. A new subscription can be created by clicking on the "New subscription" link. The "full list" command is also available.

By clicking on a row, the data displayed in the "Renewal Tasks" list and in the "Subscriptions by item" chart are automatically filtered.

Renewal Tasks

In this list the Renewal Tasks that correspond to the (selected) Active Subscription are presented. By clicking on the link in the "Item" column at row level, the particular task can be accessed for viewing and editing. The "full list" command is also available.

Subscriptions by item

The chart presents information on the subscriptions per item.

Processes

The "Processes" object provides a list of shortcuts that correspond to different stages of a subscription's life cycle:

- **Subscriptions to be invoiced**: Link to the corresponding list. Next to the link, the number of the pending "Subscriptions to be invoiced" is displayed, if any.
- **Subscriptions to be renewed**: Link to the corresponding list. Next to the link, the number of the pending "Subscriptions to be renewed" is displayed, if any.

- **Subscription correspondence**: Link to the corresponding list for printing subscription recipients' labels.
- **E-subscription shipping**: Link to the corresponding list for shipping e-subscription.
- **Subscription tirage**: Link to the active subscriptions' tirage analysis.
- **Subscription templates**: Link to the corresponding list.