

// Mamut Business Software

Getting Started with Mamut Online Desktop

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Contents

Welcome to Mamut Online Desktop	3
Getting Started	6
Status.....	23
Contact	25
Time Sheet.....	36
Company Dashboard.....	42
Equipment Register.....	45
Business Year Planner	48
Webmail	51
Mamut Online Survey	53
Webhosting	56
Sales	57
Report Archive	60
Mamut Online Desktop FAQs.....	64
More information	69



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Welcome to Mamut Online Desktop

Mamut Online Desktop provides you with web based access to the information and functionality of Mamut Business Software, along with the services included within Mamut One. Mamut One brings together financial and contact management (CRM), communication, workflow management, e-commerce, enterprise mobility, web hosting as well as knowledge and community into one complete solution.

This guide is intended as a brief introduction to Mamut Online Desktop. It provides a basic description of how to get started; the settings required in both Mamut Business Software and Mamut Online Desktop, along with information regarding how you can customise the settings to best suit your own needs. You will also find an overview of the different work areas included and how to navigate through them. In order to gain access to Mamut Online Desktop, you must have a valid agreement for Mamut One. The services that you have access to within Mamut Online Desktop are dependent on your Mamut One Service Agreement.



Important! Please ensure that you read the Mamut Service Agreement carefully before setting up and getting started with Mamut Online Desktop. This agreement provides you with an overview of the terms that apply between you as a customer and Mamut as a supplier.

Once you have activated Mamut Online Desktop you are able to view, create, and edit information from any computer with an Internet connection, anywhere and at anytime. This makes it simple to share information with colleagues, or to obtain access to information from your Mamut system while you're out of the office. Information registered via a browser and locally within your Mamut system, is continuously synchronised. Your company will therefore always have access to up-to-date information. The synchronisation with Mamut Online Desktop will be done from one of the computers within the network. This computer must be connected to the Internet.

Mamut Online Desktop collects all of your web based functions and provides you with access to key figures and status information, customer and supplier information, activities and calendar, time sheets, Business Year Planner along with control, validation and analysis of your accounting data, all via the Internet.



Note! The documentation may refer to services and/or functions that are not included within your solution. If you wish to get more information regarding this, please contact Mamut. On our home page you will find further information about which products and services are included within Mamut Online Desktop.

We are convinced that you and your company will reap great benefits from Mamut Online Desktop and that this award winning software-plus-services solution will help you to simplify your day-to-day business.

Best of luck with Mamut Online Desktop!

Mamut ID



Mamut ID is a common login service for a range of applications and services provided by Mamut. Within your Mamut ID profile you are able to view or edit information about your user account to online services provided by Mamut. The service is only available through applications using Mamut ID as login service.

You are able to use your personal Mamut ID to log in to Mamut Online Desktop.



Note! You will create your own Mamut ID through the connection wizard when you first begin using Mamut Online Desktop. Read more below.

Use a Secure Password

In order to prevent unauthorized access to your account and services, you must register a secure password which is difficult for others to guess. The system will only approve passwords that meet the security requirements. A secure password must include at least 6 characters and must be a combination of upper and lower case letters, digits and symbols. You should not use words from dictionaries, user names or proper names in the password. It may prove a good idea to combine a number of characters based on a sentence.

Example: I have one thousand books in my book case: lh1000BiMBc.


Mamut ID Controls Language Preferences within Mamut Online Desktop

Your preferred language is controlled by the setting in your Mamut ID profile. When you are not logged in - or when in the process of logging in - your language preferences may be temporarily overridden by the language setting in your web browser or by "cookies" stored in your computer from previous sessions.



Tip! If you are unable to apply your language preferences, try deleting the "cookies" stored in your web browser.

Changing Mamut ID

 Your Mamut ID information can be edited by navigating to **Settings - Account Administration - My Mamut ID Profile** within Mamut Online Desktop. You can change language, password and contact information. You cannot change the e-mail address.

Forgotten Password?

If you have forgotten your password, click **Forgotten password** on the login page. You will receive an e-mail containing information about how to create a new password.



Note! The username and password for your Mamut ID is not the same as the username and password you use to log in to Mamut Business Software.

Getting Started



Important! Before you can activate Mamut Online Desktop you need to enter your Licence Information in Mamut Business Software.

To do so, go to **Help - About – Manage Licence Information – Additional Products**. Here you will find a list of the additional products that you have access to. From the list, select **Mamut Online Desktop** and click **Add** to see an overview of the Mamut Business Software company databases that you are able to connect your Mamut Online Desktop licence to. Select the company database that you wish to apply your licence to and then click **OK**. Close the program and restart it. Mamut Online Desktop functionality will now be available.

Prerequisites for Getting Started

In order to connect to Mamut Online Desktop, the following criteria must be fulfilled.

- The user must be registered as an Employee in the Employee Register within Mamut Business Software and linked to an employee.
- The user must also be defined as a **Super user**.
- The company's registration number, address, telephone number and e-mail address must be registered. Enter the information in Mamut Business Software by clicking **View - Settings - Company**. The company registration number can be found by clicking **Financial Settings**.
- Your computer must be connected to the Internet. You can use Internet Explorer 7 or later, or Firefox version 3 or later.

System Requirements

A complete overview of system requirements and recommendations can be found here: www.mamut.co.uk/system.

The connection wizard controls that all of the criteria has been fulfilled in order to be able to connect and will list the information that is missing or the criteria that has not been fulfilled.



Note! You cannot use the sample database in Mamut Business Software to evaluate Mamut Online Desktop. Mamut Online Desktop is not available in any evaluation version.

Synchronisation

Your first data synchronisation may take some time. You cannot use the program while synchronisation is in progress. You should therefore decide if you want to synchronise now or later and can make this decision when you are prompted by the wizard (see below).



Note! API users and Mamut Business Software integrations with other software must be disabled when synchronising with Mamut Online Desktop for the first time.

The synchronising of Mamut Online Desktop will occur from one of the computers in the network. This is usually the same computer with which you connect. This can be changed later within the company settings for Mamut Online Desktop. In a multi-user database, it is recommended that you use the computer containing the system database for synchronisation.

The connection must be done through Mamut Business Software.

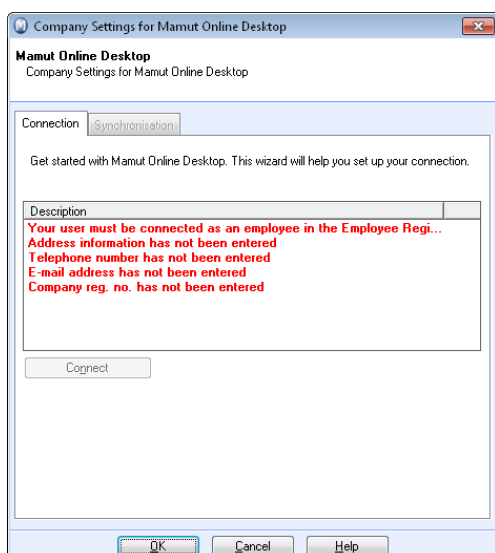
How to connect to Mamut Online Desktop

1. Click the button **Connect to Mamut Online Desktop** on the Desktop toolbar and then click **Connect**.

--Or--

Go to **View - Settings - Company - Settings per Module - Mamut Online Desktop** within Mamut Business Software.

The system checks if you have fulfilled the criteria to be able to connect. Requirements which have not been met will be displayed in red in the list. Click **OK** and then complete the necessary requirements in the list, and try again.

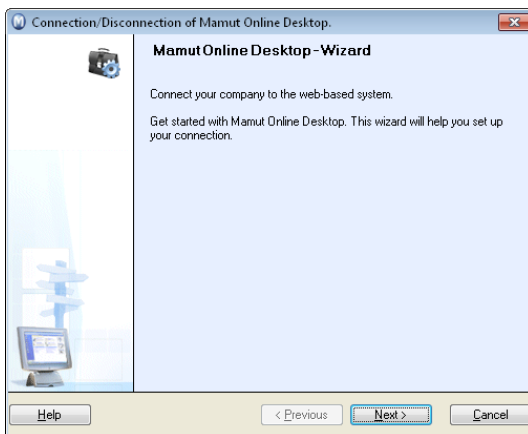


Read more about the company settings for Mamut Online Desktop below.

2. Click **Connect**.



3. Click **Next**.



4. Create a new Mamut ID, or enter your Mamut ID **Username** and **Password** if you have one already.

Note! User name and password for the Mamut ID are not the same login information which you use to access your Mamut Business Software application.

If you choose to register a new Mamut ID, you must register a valid e-mail address as you will receive an e-mail containing a link which you must follow in order to register a password. When you have registered your Mamut ID, you can re-launch the wizard and log in using your Mamut ID **Username** and **Password**. Read more about Mamut ID above.

Tip! If you do not receive the e-mail, it may have been filtered as junk e-mail and therefore it is recommended that you check your junk folder as well.

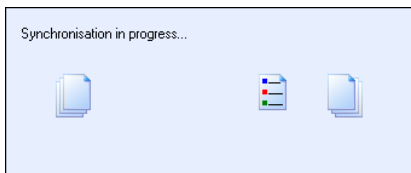
5. Check the information registered within the company account and click **Next**. The information is fetched from the company settings within Mamut Business Software.

6. Choose when you wish to start the synchronisation and click **Next**. If you choose to start now, you must wait for the synchronisation to be completed.



If you want to synchronise later, you can enter a date and time. You can close the program, but the computer performing the synchronisation must not be switched off. If you choose to shut down your computer, you must re-connect later.

7. Click **Complete**.




 *When you are connected, a status window will be displayed confirming your connection to Mamut Online Desktop. The synchronisation will run continuously.*

If the synchronisation has been interrupted for more than one hour, the time since the last synchronisation will be shown in the top right corner in Mamut Online Desktop, under your login name.

Log In and Invite Users

Log into Mamut Online Desktop through the web browser; using your Mamut ID. You are able to login directly via a web browser at www.mamutonline.com or via the Mamut Online Desktop focus area within Mamut Business Software.

Read more about inviting users below.

 **Tip!** The information box **Synchronisation History** can be displayed on the desktop under user settings for the desktop within Mamut Business Software.

How to Invite Users to Mamut Online Desktop

The Super User can invite users to Mamut Online Desktop. The invitation process lets you define the user's access rights before sending an e-mail invitation complete with a personal message.

In order to provide your colleague's access to Mamut Online Desktop, you need to send them an invitation that they must accept before they can get started. Before you can send out the invitation, the person you wish to invite must be registered as both a user and as an employee in your local installation of Mamut Business Software.



Note! Only users who are registered as a Super User within Mamut Online Desktop can invite other users.

How to invite new users

1. Log into Mamut Online Desktop through the web browser, using your Mamut ID. You are able to login directly via a web browser at www.mamutonline.com or via the focus area within Mamut Business Software.
2. In the desktop toolbar, select **Settings - Account Administration - User Administration**.
3. In the **User Administration** screen, you will find a list of all users who are eligible for an invitation to Mamut Online Desktop (registered as users and employees within Mamut Business Software). The screen includes information about how many users can be invited.
Click the name of the user you wish to invite.
4. In the **Edit user** screen, click **Invite user** in the toolbar.
5. Enter the relevant information in the screen that is displayed.

E-mail address: Enter the e-mail address you wish to send the invitation to. If the user already has a Mamut ID use this e-mail address.

Personal message: Enter a personal message in this field (not mandatory).

User Access Rights: Using the radio buttons, select which user access rights the user will receive:

Access Template: This option allows you to choose between the six predefined access templates. Please note that there must be at least one Super User within the system at all times.

User-defined: This option lets you assign a customised access template to the user. For each work area within Mamut Online Desktop, you can assign **No access**, **Read access**, **Full access**, or **Custom access**.

If you select **Custom access**, click the **Edit** link in order to open a window in which you can specify each individual access control within the work area:

Checking the boxes means that the user has access to the functionality. Read more about this in the section "How to Assign User-defined Access".

6. When you have assigned access, click **Send** in the upper left-hand corner of the screen.
7. Click **Close** to finish the process and go back to the **User Administration** screen.



The invitation has now been sent and the recipient will receive an e-mail containing information about how to access Mamut Online Desktop. The invitation is only valid for a certain number of days. If the user tries to register after the invitation has expired, the person in question will be notified that the link is invalid. From the User Administration screen, you can also click Resend to send the invitation again, or Delete in order to void the invitation.



Note! The number of Mamut Online Desktop users is limited by your licence.

Which users can be invited to Mamut Online Desktop?

You can only invite users who are registered users within Mamut Business Software. The user must also be linked to an employee within Mamut Business Software. If you cannot find a certain user in the **User Administration** screen, please check the following:

Is the user a registered user within Mamut Business Software? Go to **View - Settings - Security - User Administration** in order to find out. You should register the user via the **Users** window if he/she is not already registered.

Is the user linked to an employee in the Employee Register? In the same window, you must ensure that the user is linked to an employee in the field **Link to employee**. If the user is not linked, please select **Create employee** from the drop-down list.

The services that you have access to within Mamut Online Desktop are dependent on your Mamut One Service Agreement. The number of users you can invite is limited by your licence and Mamut One Service Agreement. Please contact our experienced sales representatives for product information on 0800 032 5616 (free) or e-mail sales@mamut.co.uk.

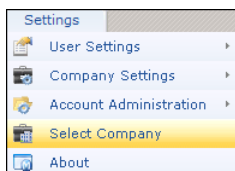
Select Company



Select Company provides you with an overview of the company databases that have been synchronised with Mamut Online Desktop. Here you are able to select the database you wish to work in and set a default company database. If administrators of other companies/system databases wish to give you access to their company databases via Mamut Online Desktop, they can register you as a user in their system and then invite you. In that case, you can use the same Mamut ID, if you have been registered with the same e-mail address. If you have access to several companies via Mamut Online Desktop, you can switch between these after having logged in.

How to select a company

1. In the desktop toolbar, select **Settings - Select Company**.



2. Use the radio buttons to indicate which company you wish to open.
3. Click **Continue** to open the company database.

You can choose to **Set the selected company as your default company database** (mark with an asterisk), if you want the company database to open automatically when you log into Mamut Online Desktop.

If you wish to remove the pre-selection of a company database, click the button **Remove setting for default company database**.

Note! If you have access to more than one company database with Mamut Online Desktop, and have not selected a default company database, the **Select company** window will open automatically when you log in to Mamut Online Desktop.



The selected company database will now open.

User Administration

User Administration allows you to administer which users within the current company database will have access to Mamut Online Desktop. You can also view and edit current users of the company database. The page displays users with the different statuses and access profiles.

The **User Administration** screen can be accessed by clicking **Settings - Account Administration - User Administration**.

The User Administration Screen

The screen contains information about the number of users your license allows you to register on Mamut Online Desktop, as well as how many user invitations are remaining.

The screen also contains a list of all users who are eligible for registration as Mamut Online Desktop users - registered as both users and as employees in your locally installed company database. The column **Status** displays the current status of the user's invitation, and the **Access Profile** lists the access templates to which the users have been assigned by the Super User.

In order to edit any user information, click the user's name in order to open the **Edit user** screen where you can invite the user, enter the user's e-mail address, and define his/her user access rights.

Company Settings for Mamut Online Desktop



Note! This topic describes the company settings for Mamut Online Desktop, which are available in Mamut Business Software.



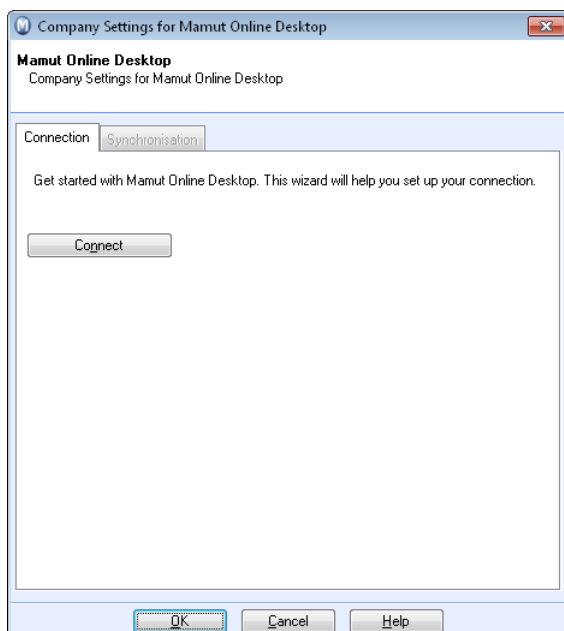
In the Mamut Online Desktop company settings, in Mamut Business Software you can connect, disconnect, review synchronisation conflicts and change the user or the computer for synchronisation.

The company settings can be found by clicking **View - Settings - Company - Settings per Module - Mamut Online Desktop** in Mamut Business Software.

Connection

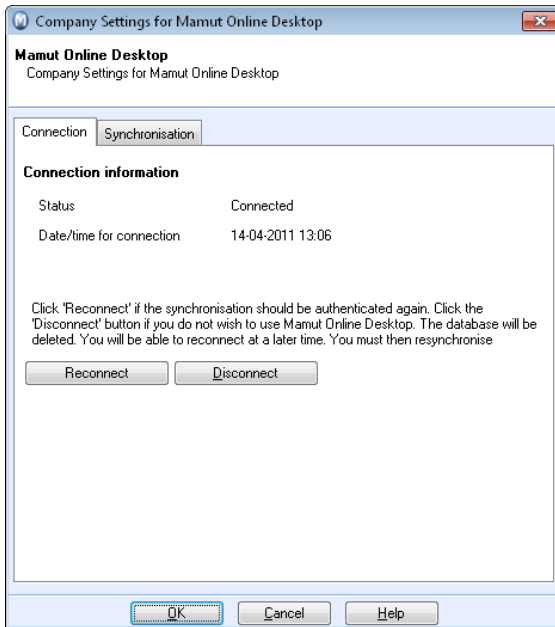
This window lets you know if all the requirements for connecting to Mamut Online Desktop have been met. The requirements which have not been met will be displayed in red.

Connect: Launches the connection wizard for Mamut Online Desktop. In order to connect, the user must be registered with a valid e-mail address in the employee register within Mamut Business Software. The user must also be linked to an employee within Mamut Business Software.





Note! Only users with **Super user** access rights can connect. You cannot use the sample database in Mamut Business Software to evaluate Mamut Online Desktop. Mamut Online Desktop is not available in any evaluation version.

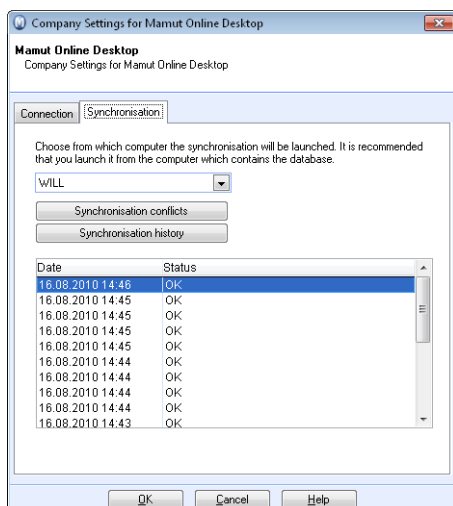


Reconnect: Use this option to reconnect with Mamut Online Desktop after changing your Mamut ID password or after restoring a backup of the company database.

Disconnect: This option is only displayed if you are connected to Mamut Online Desktop. Click the button to halt the synchronisation and disconnect the company database from the Mamut Online Desktop. Read more about disconnecting Mamut Online Desktop below.

Synchronisation

One of the computers within your network will synchronise with Mamut Online Desktop. It is recommended that you synchronise the computer which contains the database. Select the computer from the drop-down list.



Synchronisation conflicts: The log displays a list of all conflicts and how they have been resolved over the last seven days.

A conflict will be registered if a user in Mamut Business Software and a user on Mamut Online Desktop edit the same field in the same item (for instance, change the name of the same contact) during the same synchronisation session. The conflict is logged in the synchronisation history and will contain information on how the conflict was handled. However, a change of two different fields for the same contact will not be treated as a conflict.

In such instances, the changes made in Mamut Business Software will always override the changes made via Mamut Online Desktop.

Synchronisation history displays an overview over downloads and uploads performed during the last seven days, as well as information about when and from which computer the last synchronisation was carried out.




Tip! The information box **Synchronisation history** displays the same information. You can choose to display this box on the desktop. Read more about how you are able to customise the information boxes on the desktop in the section "User Settings for the Desktop" within the built in help files.

The tab also provides a basic synchronisation log. Data is continuously synchronised and the window displays time and status for the last 20 synchronisations. If the **Status** column displays an error, you can select the line and click **Error message** beneath the list to view the error message.

Disconnecting Mamut Online Desktop

 **Tip!** You can disconnect from your Mamut Business Software program.

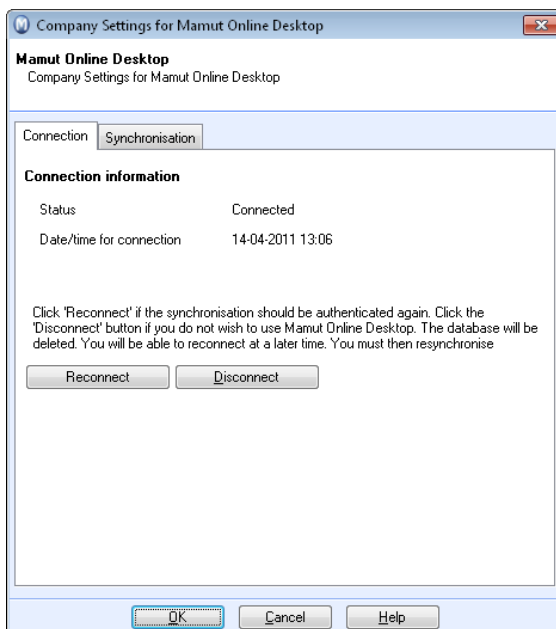
 **Note!** Only users that are defined as **Super users** can disconnect. You must also be connected to the Internet. The disconnection must be carried out from the computer which is synchronised with Mamut Online Desktop. If you are unsure about which computer is used for synchronisation, you can check in the window below, in the **Synchronisation** tab. You should disconnect and restore at a time when no other users are logged into Mamut Online Desktop and Mamut Business Software.

Backup: You can back up the system even if you are connected.

Restore: You cannot restore a backup copy when you are connected to Mamut Online Desktop. You cannot restore a single company database to a system database if the company database you are restoring is connected. In order to restore a backup copy, you must first disconnect the company database currently connected.

How to disconnect


1. Go to **View - Settings - Company - Settings per Module - Mamut Online Desktop**.




2. Click **Disconnect**.

3. Log in using your Mamut ID and click **Next**.

4. Click **Complete**.

 *The synchronisation is cancelled and the database is disconnected. Disconnected databases will be removed automatically from the server, with the exception of data which is used if you choose to re-connect at a later time (for instance, your company information and your user access information).*

 **Note!** All data is stored within Mamut Business Software, even if you disconnect the Mamut Online Desktop synchronisation. If you choose to reconnect at a later time, your data will be resynchronised.

Important Tools in Mamut Online Desktop

Below you will find an overview over the most important tools found in the different work areas on Mamut Online Desktop:



New: Click this button in order to create a new item in the work area you are currently working in.



Edit: Edits the data of an existing item in the various work areas.



Save: Saves the data you have registered without navigating away from the current screen.



Save & New: Saves the data you have registered and opens a new empty registration screen.



Save & Close: Saves the data you have registered and closes the registration screen.



Delete: Deletes the selected item.



Refresh: Click this button in order to refresh the screen and get the latest changes.



User Settings: Opens the user settings screen for the work area in question.



Close: Click this button in order to close the active screen.



Print: Click this button to print or open a print preview of the screen in question. In the preview screen, click **Print** in the upper right hand corner.



Cancel & Close: Closes the registration screen without saving your data.

User Access Register

User Access Administration within Mamut Online Desktop

Access can be defined as **Full**, **Read**, and **No access** to entire areas or to individual features within each area. Each user can be granted access to each individual area/function or be assigned to a predefined access template. You can administrate user access from within Mamut Online Desktop, by clicking **Settings - Account Administration - User Administration**, or as a step in the invitation process.



Note! Only the **Super User** (user with full access to the system) can assign/remove user access. There must always be at least one Super User within the system.

Predefined Access Templates

Mamut Online Desktop 3.0 includes a number of predefined access templates that can be assigned to users by the Super User. The predefined access templates cannot be deleted or edited. Read more below.



Note! If you are updating from a previous version of Mamut Online Desktop, users who were registered as **Administrators** will be assigned to the access template **Super User** (full access to the entire system). All other users will be assigned to a more restricted access template.

User-defined Access

You can restrict user access to certain areas and/or individual functions within Mamut Online Desktop. If you do not wish to grant or restrict access to an entire area, you can define access to each constituent function. Read more about this below.

How to Assign a User Access Template

You can assign a user access template to a user if you do not wish to specify to which areas of the system each user can access manually. The predefined access templates cannot be deleted or edited.

There are two ways of assigning a user access template to a user:

- As a step in the invitation process. Read more about this in the section "How to Invite Users to Mamut Online Desktop".
- For existing users via the **User Administration** screen. Read more below.

How to assign a user access template to an existing user:

1. Within Mamut Online Desktop, click **Settings - Account Administration - User Administration**.
2. Click the name of the user you wish to edit.
3. Click **Edit** in the screen that opens.
4. Check the radio button **Access Template** and select an access template from the drop-down list.
5. Click **Save & Close**.



The user has now been assigned to the user access template.

You can also assign user-defined access for each user. Read more about this below.

How to Assign User-defined Access

You can assign user-defined access to a user if you do not wish to use one of the predefined access templates. The predefined access templates cannot be deleted or edited.

There are two ways of assigning user-defined access to a user:

- As a step in the invitation process. Read more about this in the section "How to Invite Users to Mamut Online Desktop".
- For existing users via the **User Administration** screen, see the procedure below.

How to assign user-defined access to an existing user:

1. Within Mamut Online Desktop, click **Settings - Account Administration - User Administration**.
2. Click the name of the user you wish to edit.
3. Click **Edit** in the screen that opens.
4. Check the radio button **User-defined access**.
5. In the list that is displayed, choose between the radio buttons **No**, **Read**, **Full** or **Custom Access** for each work area.

If you select **Custom**, you can click the **Edit** link in order to define the access to each individual control within the work area.

6. Click **Save & Close**.



The user has now been granted access to the functions of your choice.

You can also assign a predefined user access template for each user. Read more about this above.

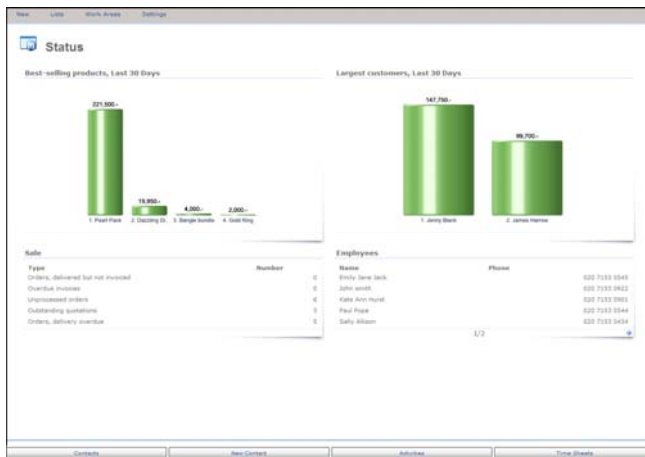
Status



Status brings you up-to-date key figures and information with an overview of the best selling products and largest customers over the last 30 days, along with key information regarding the company's sales and employees.

Information boxes under Status

Within the Status work area on Mamut Online Desktop, there are four different information boxes that summarise some of your key data from Mamut Business Software.



Best-Selling Products, Last 30 Days

This information box displays the best selling products from your company for the last 30 days.

Largest Customers, Last 30 Days

This information box displays the largest customers for the last 30 days.

Sale

This information box summarises some of your most important sales data.

Employees

This information box allows you to use the arrows, in the bottom right-hand corner, in order to gain a quick overview of the employees in your company.



Tip! You can choose to display the same information boxes on **My Desktop** within Mamut Business Software. However, you cannot choose which information boxes to display within Mamut Online Desktop. Read more about how you are able to customise the information boxes on the desktop in the section "User Settings for the Desktop" within the built in help files.

The Status Work Area

Shortcuts

The lower part of the screen contains four shortcuts.

1. **Contacts**
Displays all of your contacts in alphabetical order. Click on one of the contacts in order to view more detailed information.
Click the column headings in order to change the sorting of the column.
2. **New Contact**
Allows you to add a new contact to your contact list.
3. **Activities**
Displays a list of all of the activities that are relevant for your company and employees. Click on one of the activities to display more detailed information. Click on the column headers in order to change the ascending sequence.
4. **Time Sheets**
Displays a list of all of the time sheets for all users. Here you are able to administer the time sheets that are registered in both Mamut Online Desktop and Mamut Business Software. Click on the column headers in order to change the ascending sequence.



Note! The registrations made via the web browser and Mamut Online Desktop, as well as locally within your Mamut system, are synchronised continuously. This means that the business always has access to up-to-date information.

Contact

Managing Contacts



You can create new contacts anywhere, at any time with Mamut Online Desktop. Information registered via a browser and locally within your Mamut system, is continuously synchronised. Your company will therefore always have access to up-to-date information.

The **Contact** work area allows you to manage your contacts through Mamut Online Desktop. You can view and edit the contacts and contact persons that already exist within Mamut Business Software and in addition you are able to create new contacts.

Please note that the Contact work area consists of customers, suppliers and possibly partners as well as private contacts. A contact can be both a customer and a supplier. If this is the case, select both options in the contact card.

Contacts can be linked to a contact person. Registering contact persons makes it easier for you to locate the person you wish to contact or refer to in different situations. You can open the contact person(s) list as an independent registry by clicking **Lists - Contact Persons** or via **Work Areas - Contact - Contact Persons**.

The Contact Work Area

The **Contact** work area gives you direct access to your contacts, contact persons, activities, calendar and time sheets.



Activities display a list of all activities.



Time Sheets display a list of all time sheets and the status of each time sheet.



My Calendar takes you to your personal calendar showing only your activities.



Contacts display a list of all contacts.



New Contact takes you directly to the contact registry.



Projects opens a list in showing your registered projects and allows you to create new ones.



Contact Persons display a list of all contact persons.



New Contact Person takes you directly to the contact person registry.

The work area also contains two information boxes: **My Activities**, where you can access the activities you are responsible for and **My customers**, where you can access the customers you are assigned to as Our reference.

Through the shortcuts that are located along the base of the Status and Contact work area windows, you are able to access the following functions: **Contacts**, **New Contact**, **Activities** and **Time Sheets**.

Activities

Mamut Online Desktop provides you with an online overview of activities concerning your company and employees. Create, edit and view activities online and keep track of these via the online calendar or activity list.

Activities







Activities in Mamut Online Desktop allow you to manage all activities registered either online or in your locally installed Mamut Business Software. From here you can create new activities as well as edit or delete existing ones. The activity list also contains shortcuts to your personal calendar, the common calendar, the online contact work area and the user settings.

If you have a large amount of activities, you can define a filter for what should be displayed in the list. Available filter criteria in the activity list are **Duration**, **Status**, **Type** and **Responsible**.

The Activity Card

When you wish to create, edit or view a single activity, you can open the **Activity card**. The activity card can be displayed in two ways: **Simple mode** and **Full mode**. You can toggle between the simple and full views by clicking the **Switch View** button. You can set either the full or simple activity card as the default in the user settings for Activity and Calendar.

Simple mode: The simple activity card will open as a pop-up window and only contain the most important information. Click **Edit** in order to change the information.

 Edit		 Switch View	
 Delete		 Close	
Quick Actions		Other	

Subject	Client Demonstration		
Start time	2009-07-23 10:00	Type	Demonstration
End time	2009-07-23 11:30	Status	Not started
Alarm	<input type="checkbox"/> 0 minutes	Responsible	(None)
Contact	<input type="text" value="Fusion"/>		
Notes	<div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>		

Full mode: The full activity card contains the same information as you would find in your locally installed version of Mamut Business Software. In the edit mode, you will be able to edit all information in the window's upper half.

The lower half of the full activity card contains panels related to the activity: **Notes, Product, Quotation, Sales and Invoicing, Purchase, Time Sheet, Documents** and **Miscellaneous**.



Click the arrow buttons on the right hand side of the screen in order to expand or collapse the panels.

The Calendar

The online calendar is an integrated part of the activity functionality. It is possible to display all activities created within the system in either your personal calendar, or the common calendar.

Read more about the online calendar in the section "Calendar".



Note! Information registered via a browser and locally within your Mamut system, is continuously synchronised. Your company will therefore always have access to up-to-date information.

Reports



You can print reports from the online activity and calendar screens. To print a single activity, navigate to the activity and click **Print** in the toolbar. The report will reflect all information that has been registered on the activity. You can also print the entire activity list by navigating to **Work Areas - Contact - Activities** and clicking **Print** in the toolbar. The report will then display information such as **Start time, End time, Responsible, Type** and **Status**.



Note! The documentation may refer to services and/or functions that are not included within your solution. If you wish to get more information regarding this, please contact Mamut.

Calendar

Mamut Online Desktop provides you with an online overview of activities concerning your company and employees. Create, edit and view activities online and keep track of these via the online calendar or activity list.

The online calendar is an integrated part of the activity functionality. The calendar can be displayed as a personal calendar (**My Calendar**), only containing your activities, or as a **Common Calendar**, displaying the activities for your employees or resources. The personal calendar can be accessed by clicking **Lists - My Calendar**. Click the **Common Calendar** button in the toolbar in order to navigate to the common calendar.

Activities in the Calendar

It is possible to display all activities created within the system in either your personal calendar, or the common calendar. You can also create new activities directly from the calendar view by clicking **New**.

You can choose whether an activity is displayed in the actual calendar or in the task list to the left of the personal calendar. This is controlled by the different activity types. Activity types **Registered**, **Demonstration** and **Meeting** are displayed in the calendar, whereas activities such as **Letter**, **Fax** and **Tel. out** are displayed in the task list. You can override this default setting by selecting the check box **Show activity in the task list** in the **Misc.** tab. Alternatively; you can remove any activity from the task list by deselecting the check box **Show activity in the task list**.

You can at any time switch between the two different calendars by clicking **Common Calendar** or **My Calendar** in the toolbar.

My Calendar



The personal calendar displays all calendar activities in which the person logged on is either defined as **Responsible** or **Employee**. The task list to the left of the actual calendar displays activities in which the person logged on is defined as **Responsible**.

You can change which period is displayed by clicking **Day**, **Week** (working week or full week) or **Month**. The task list is not affected by what period is selected. From the toolbar you can also choose to view **Open Tasks**, **Closed Tasks** or **All Tasks** in the task list.

From the toolbar you can also open the activity list, today's calendar, the common calendar and the user settings for activities and calendar.



Tip! You can create an activity directly from the calendar by placing the mouse cursor on the date and time of your choosing and clicking once.

The Common Calendar



The common calendar lets you view the schedule of several employees/resources at the same time. In the toolbar you can choose to display in the calendar in three different views:



Common: Use this view to display the calendars of employees or resources linked to a certain project or department. If you select **(None)** from the drop-down lists, the calendar will display all activities registered in the system.



Single: Use this view to display the calendar of a single employee or resource.



User Defined: Click the **User Defined** button and use the arrows to include or exclude employees or resources from the user-defined common calendar.



Zoom: Select which level of detail should be displayed in the common calendar: 100% (one day) or 50% (one work week).



Tip! You can define a default mode for the calendars in the user settings. Go to **Settings - User settings - Activity and Calendar** and define your settings in the **Personal** or **Common Calendar** field in the screen that opens.

User Settings for Activities and Calendar

You can customise Activity and Calendar by defining the user settings. Here, you are able to define the layout. These settings will only affect you and will have no implications for other users of the system.

You can access the user settings by clicking **Settings - User Settings - Activity and Calendar**.



Note! The changes that you make in the user settings for activities and calendar on Mamut Online Desktop will not affect the user settings defined in your local installation of Mamut Business Software.



Click the arrow buttons on the right hand side of the screen in order to expand or collapse the fields.

Default Setup

The settings can be adapted for users who have advanced and/or simpler needs. The Default Setup allows you to use preset settings for time sheet: **Simple**, **Normal** and **Advanced**.

Activities

The check boxes represent columns displayed in the activity list. Select the boxes you wish to display in the activity list.

Activity Card

In this field you can define what information should be predefined within the drop-down lists for **Type**, **Status**, **Responsible**, **Project** and **Priority**. This information will therefore be filled out automatically when you open the activity card.

Simple activity card/Full activity card: By default, the activity card will be opened in the **Simple mode**. You can choose to always open the full activity card by selecting the **Full activity card** radio button.

Do not show the details of my activities in the calendar for others: Select this option if you do not want others to access the detailed information about your activities via the calendar.

Activity Card
Here you can select the default values for a new activity.

Default value

Type: Meeting
Status: In progress
Responsible: John smith
Project: (None)
Priority: Medium

Other

☒ Simple activity card ☐ Full activity card

☒ Do not show the details of my activities in the calendar for others

My Calendar

My Calendar
Here you can define the view of your personal calendar and task list.

Default calendar view

☐ Day ☒ Week ☐ Monthly view

Default task list view

☐ Open Tasks ☐ Closed Tasks ☒ All Tasks

Default calendar view: You can customise the calendar by selecting a 1 day view, 7 day view or monthly view.

Default task list view: Here you can choose to display open, closed or all tasks in your task list when opening your calendar.

Common Calendar

Here you are able to select the employees and resources that you would like to be visible within the Common Calendar.

Common Calendar
Here you can select the employees and resources that you would like to be visible in the Common Calendar.

☐ Group ☐ Project ☐ Department: (none)
☐ Single ☐ Employee ☐ Resource: (none)
☒ User-defined

Default zoom: 100%

The following options are available within the Common Calendar:

Group: Select this option to display the calendar for a group of employees linked to a certain **Project** or **Department**.

Single: Displays the calendar for one **Employee** or **Resource**.

User-defined: Select the radio button and click the button to the right in order to open a pop-up window where you can define the employees or resources that will be displayed by default in the group calendar. Use the arrow buttons to include or exclude employees or resources.

Default zoom: The drop-down list contains the options **50%** (displays one work week) and **100%** (displays one day).

Click **Save & Close** to save your settings.

Project Register

The Project Register in Mamut Online Desktop allows you to create new projects as well as view, edit and delete existing projects in Mamut Business Software and in Mamut Online Desktop. Projects created in Mamut Online Desktop will be synchronised with Mamut Business Software and vice versa. The projects can be divided into **External** or **Internal** projects and only external projects can be submitted for onward billing. You can define **Priority**, set the project to permanently or temporarily **Inactive**, link to a **Department** as well as plan the project duration.

You can create and find projects via the **Contact** Work Area, where you will find an entry point to the project list or via the main menu bar in Mamut Online Desktop.

The project register allows you to follow the development of your projects by assigning different statuses (planning, execution, completed and inactive). This will provide you with an overview of the projects your company is working on.

The Project Register List


The Project List provides an overview of all of the registered projects. You are able to access this list either via the Contact work area or via **Lists - Projects**. The project list allows you to view existing projects as well as create new ones.

Search for: If the project list contains multiple projects you can use the filter options in the upper part of the screen to search for the project you wish to take a closer look at. The possible filter options in the first drop-down list are **Status**, **Name** and **Project Class**. You are also able to use the search options in the second drop-down list to make your search even more precise.

Add new: If you wish to add a new project, click **Add new** at the top of the list. A new empty project card will open, where you can enter the details in the new project.

Working with projects

How to create a new project

1. Within Mamut Online Desktop, click **Work Areas - Contact - Projects - Add New**
- or --
New - Project.
2. Enter the desired **No./Project class** and **name** as well as a more detailed description in the **Description** field.
3. When you fill out the **Planned start date** and **Planned end date** the program will automatically fill out the project's **Planned duration**.
4. Select whether the project is **Internal** or **External** in the **Type** drop-down list. If you want to be able to Re-bill purchases, invoiced hours or fixed price amount, you will need to set the project to external.
5. Adjust the **% Complete** according to the progress of the project. You can create your own percentages in the **Properties register** in Mamut Business Software by right-clicking and choosing **Change in properties register**. Read more about the **Properties register** in Mamut Business Software in the chapter "Settings" in the introduction manual "Settings, Reports and Filters".
6. Select if the project is linked to a department.
7. Enter the project's **Priority** in the drop-down list.
8. Select the employee in your company who will be **Responsible** for the project.
9. Enter **Notes** if necessary.
10. The **Available in accounting** check box is defaulted to this setting. Deselect this if you do not want the project to be available in the program's accounting modules.
11.  Click this icon to enter the project's URL, if it has a website.
12. Click **Save & Close** to be redirected to the previously accessed page
-- or --
Click **Save & New** if you want to create a new project.



You have now created a new project in Mamut Online Desktop.

How to find and view existing projects

1. Click **Project Register** in the Contact work area
-- or --

2. Click **Lists - Project**.

Tip! If the project list contains multiple projects you can use the filter options in the upper part of the screen to search for the project you want to take a closer look at. The possible filter options in the first drop-down list are Status, Name and Project Class. You are also able to use the search options in the second drop-down list to make your search even more precise.



Now the list with all of the projects will appear on the screen.

How to edit an existing project

1. Click **Work Areas - Project - Project Register**.

-- or --

Click **Lists - Projects**.

2. Select the relevant project in the list that appears on the screen.

Tip! If you have a lot of registered projects, the **Search for** function can help you to easily identify the project you are looking for, simply use the drop-down lists to define your search.

3. Select the project you want to make changes to and click **Edit** in the upper toolbar.

4. Click **Save** or **Save & Close** in order to confirm the changes and to be redirected to the previously accessed page

-- or --

Click **Save & New** if you want to create a new project.



You have now edited a project.

How to delete a project

1. Open the project you want to delete as described in the procedure above.

2. Click **Edit** in the toolbar. The toolbar will now also show the **Delete** symbol.

3. Click **Delete**. If you want to cancel the **Delete** operation, simply click **Cancel**.



You have now deleted a project.



Note! A project cannot be deleted if it is referenced in other modules. If the project is no longer active you can set it to **Inactive** in the **Status** drop-down menu.

Project Status Overview



When editing an existing project you will see the button **Project status overview** in the upper toolbar. This button provides an overview of the date, status and duration for each status of the project that has been made through the **Change Status** button. See more about change of status below. You can view all registered hours as well as orders and purchases that were made in connection with the project.

The status history window includes:

Date: the date and time when the project status was changed will be shown here. Note that when a project is created, the default time is 00:00.

Status: the different statuses the project has gone through will be displayed here. Note that the status when a project is created is (none).

Duration: this field refers to the time the project has been on the specific status. The duration is displayed in days and hours. Note that only complete hours will be counted.

Status history		
Date	Status	Duration
12-10-2011 11:17:24	(none)	0 days and 0 hour
12-10-2011 11:19:00	(none) ne	0 days and 0 hour

Click the **Close** button in order to close the window.

Change status



When you edit an existing project you are able to change the project status by using the **Change Status** button in the upper toolbar.

When clicking on the **Change status** icon, a window will open. In the drop-down lists you are able to change the status of the project as well as edit the date and time.

Project status		
To which status do you want to move the project?	(none) ▼	
Date and time for status change	12-10-2011	11:19 ▼
	OK	Cancel

These values can be edited (except for the values 'Inactive' and 'Complete') and more values can be added via the properties register in Mamut Business Software.

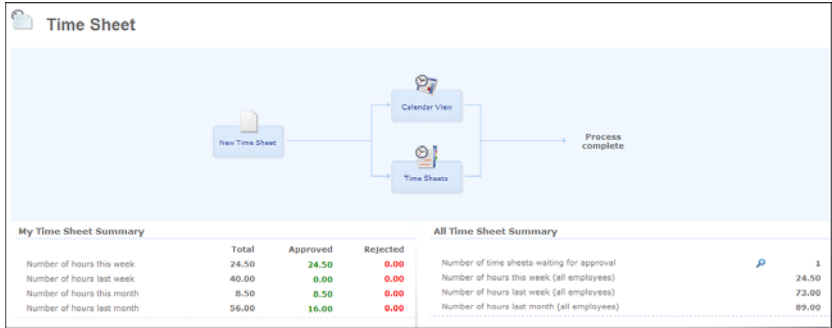


Note! A project can have the same status several times. However, the date and time for change of status must be between the previous change and the actual time.

Time Sheet



Time Sheet in Mamut Online Desktop provides you with an online overview of your company's time sheets, allowing you and your employees to create, view and edit your time sheets online, anywhere and at any time. You can manage the time sheets you have already created in Mamut Business Software, in addition to creating new time sheets and time sheet lines.



Keep track of hours worked

If you have employees that are paid by the hour, they are able to register their own hours. Employees who have a monthly salary may need to register overtime, holidays, absence and illness etc. By using the Time Sheet work area, you and your employees can access and manage this information.

Many employees register the hours they have worked on different projects and the hours spent as a consultant to be re-billed to clients. If you mainly work with projects, you can register all hours spent on the project and estimate time, resources and costs for each project. Time sheet lines linked to a project can be transferred to the Project module from where it is possible to re-bill. You can bill your clients using Mamut Business Software.

One suggestion is to create projects for the various work tasks your employees do and have them distribute the hours spent on each project when registering their hours. This will give you a good overview of the number of hours employees have spent on meetings, customer relations, and reports.

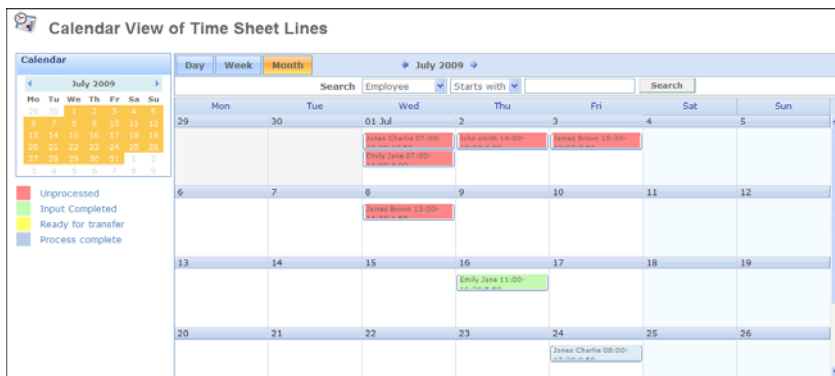
The Time Sheet work area can be customised for each user, whether they have simple or advanced needs, to achieve full effect of the work area.

The Time Sheets View

The Time Sheets view displays all time sheets for all users. This is where you create, edit, delete and manage time sheets. The **Search** function allows you to filter time sheets by project, employee, status, customer and date range. This area also includes **Approve** and **Reject** functions where time sheets can be approved or rejected.

The Calendar View

The Calendar View page allows you to view the time sheet lines for a specific day, week or month. In the **Daily** view, the time sheet calendar view allows overlapping of multiple entries on the screen. This is due to the possibility that at a certain time, multiple entries from different time sheets may appear on the same day. The **Weekly** view can be displayed as a work week or a full week. The **Monthly** view may not display all time sheet lines made on a specific date. However, if you click the arrow in the bottom right corner of the day in question, you can display all of the entries.



To view information regarding a specific time sheet line, hover over the entry within the calendar. To view detailed information, click **View** to open the time sheet that contains that entry.



Note! Information registered via a browser and locally within your system is continuously synchronised. So your company will always have to up-to-date data.

Discount in Time Sheet

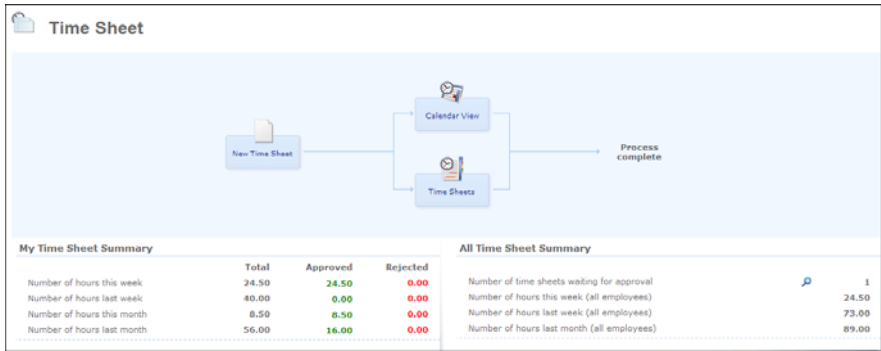
If you use Time Sheet in Mamut Online Desktop and not in Mamut Business Software, the discount is obtained from the contact that is chosen on the time sheet line. You can override the discount in statuses where the time sheet can be edited. When using Time Sheet in both Mamut Online Desktop and Mamut Business Software, only the discount from the contact will be inherited. There is not full support for the discount hierarchy like there is in Mamut Business Software. If using a more advanced way of handling discounts than at contact level you can - after having created the time sheet within Mamut Online Desktop and it has been automatically synchronised - **Regenerate time sheet line(s)**, and select **Product price and discount (sales and invoicing and project)**. The discount will now be calculated based on the complete discount hierarchy. Note that **Regenerate time sheet line(s)** cannot be used in the following statuses: Input completed and Process complete.



Note! The documentation may refer to services and/or functions that are not included within your solution. If you wish to get more information regarding this, please contact Mamut.

The Time Sheet Work Area

The **Time Sheet** work area gives you direct access to the time sheet function.




New Time Sheet takes you directly to the Time Sheet page.

Calendar View opens the daily, weekly or monthly view of the time sheet lines.

Time Sheets display a list of all time sheets and the status of each time sheet.

My Time Sheet Summary displays a summary of the hours you have worked in the current and last week and month.

All Time Sheet Summary displays the number of time sheets that require your attention for approval as well as a summary of all employees' time sheets.

 You are able to open time sheets that are ready for approval via this symbol. A single time sheet will open in the detail view. However, if there are multiple time sheets ready for approval, the time sheet list will open with all relevant time sheets.

The toolbar

The toolbar is very similar in all of the work areas for Time Sheet.



New: Creates a new time sheet, either from the Time Sheets view or the Calendar View.



Input Completed is used to let your manager know the time sheet is ready for his or her approval when completed. This status is optional and can be selected within the Company Settings.



Approves the selected time sheet(s) or opens the time sheet, or the chosen time sheets. This function is only available for users who have the access profile Administrator.



Rejects the open time sheet. You can choose to send an e-mail to the user whose time sheet is rejected by selecting this option within the User Settings. This function is only available for users who have the access profile Administrator.



Changes the view to Time Sheets view which displays all time sheets. The list can be filtered to display time sheets of a selected employee, status, project, customer or date range.



Changes the view to Calendar view which displays individual time sheet lines.



Creates an export of the time sheets or time sheet lines in the current view.



Lets you print a copy of the time sheets or time sheet lines in the current view.



Allows you to change the User Settings.

User Settings for Time Sheet



You can customise the Time Sheet work area by defining the user settings. Here you are able to modify your settings to suit your personal preference and specific requirements for performing daily tasks.



Note! The User Settings can also be accessed by clicking **User Settings** on the toolbar in the Time Sheets list, Input page or Calendar View.



Use the arrow buttons on the right hand side of the screen in order to expand or collapse the sections.

Default Setup

The time sheet settings can be adapted for users who have advanced and/or simpler needs for time sheet input. The Default Setup area allows you to use preset settings for the time sheet work area.

Simple

Simplifies the screen and displays only required fields.

Normal

Displays default fields and functionality.

Advanced

Shows all available fields and additional functionality.

Columns for Entries

The settings selected are defined by which Default Setup option you choose. You can further define which columns are to be displayed on the time sheet input screen by selecting or deselecting the settings. You can also select the **Send an e-mail when rejecting a time sheet** check box. The user that registered the time sheet will then receive an e-mail to let him/her know that the time sheet has not been approved assuming that an e-mail address has been registered in the employees contact card and that the user and employee are linked.

Default Values

If you usually create time sheet lines of the same type, you will be able to save time and avoid repeating routine work by filling them out in advance. Information such as employee, date/time, totals and time codes will automatically be displayed each time you add a new time sheet line.

You can also select if the time sheet should be transferable and you can connect a time sheet to a project and/or department.



Note! The changes that you make in the user settings for time sheets within Mamut Online Desktop will not affect the user settings defined in your local installation of Mamut Business Software.

Company Settings for Time Sheet Input



You can customise the Company Settings for Time Sheet and specify the functionality the company will use. You can select the modules time sheets can be transferred to, which information can be edited and the statuses to use.

Customisation of Functions

Select the modules to which your company transfers time sheets:

☒ Sales and Invoicing
 ☒ Project

Information you are allowed to change in the status 'Unprocessed':

☒ Price
 ☒ Discount in %

Select which of the following statuses are to be used:

☒ Input completed
 ☒ Ready for transfer

Other:

☐ You can only link employees to projects they are linked to in the employee register.

Select the modules to which your company transfers time sheets: This function allows you to set the option for Sales and Invoicing to be able to re-bill through the Sales/Invoicing module. Selecting Project will give you a complete overview on how many hours are used in connection with a project if you transfer time sheets to project. You will be able to re-bill the hours through the Project module.

Information you are allowed to change in the status 'Unprocessed': Here you are able to choose what information your employees are allowed to change in an unprocessed time sheet.

Select which of the following statuses are to be used: Select these options if the time sheet statuses Input Completed and Ready for transfer are to be used. Input Completed can be used if time sheets require a manager's approval. Ready for transfer is only available to users who have Time Sheet Input in the local installation of Mamut Business Software. If the time sheet contains at least one time sheet line that is transferable, the time sheet is transferred in Mamut Business Software.

Other: Use this option to link employees only to projects to which they are linked in the employee register.



Note! The Company settings in Mamut Business Software and Mamut Online Desktop are not synchronised. The settings you apply here will only affect the views and options available to you and your employees in Mamut Online Desktop.

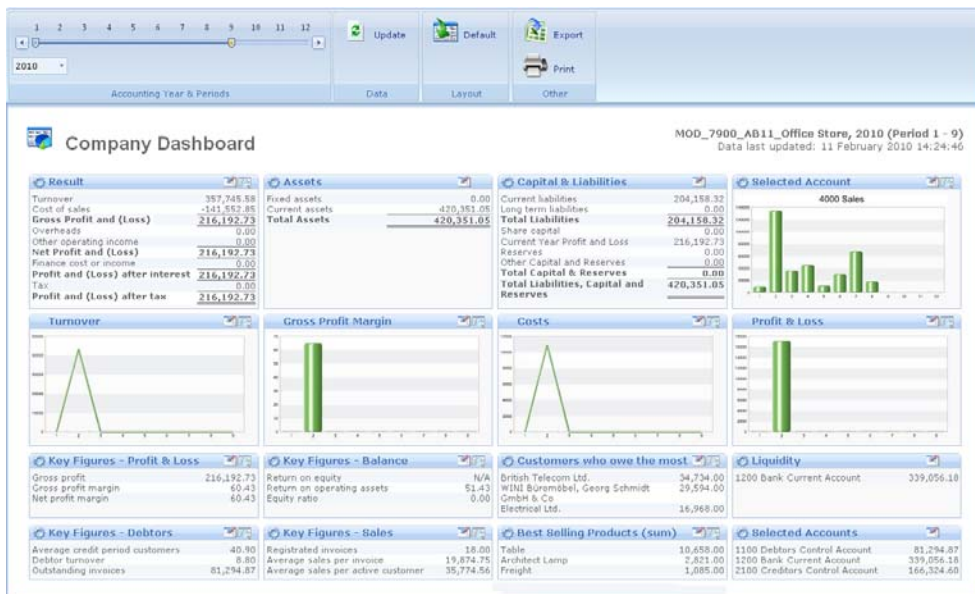


Tip! When you have logged into Mamut Online Desktop, you can click Help in the top right corner. In the help section you will find more information about the functionality.

Company Dashboard



The Company Dashboard gives you an overview of your company's most important data. It is a visual tool for presenting the company's financial status in a given period, based on information retrieved from Mamut Business Software.



The Company Dashboard on Mamut Online Desktop displays financial data, graphic presentations and key figures in order to give you an overview of your company's financial status within a given accounting period. All financial data is based on information retrieved from your Mamut Business Software database. The Company Dashboard is a one page report both in full screen view and on print outs. You can export the Company Dashboard information to a PDF format or as a Microsoft Excel sheet.



Note! The functionality is only available on Mamut Online Desktop. The Company Dashboard only contains data already registered within the system.



Tip! The key figure indicators are financial and non-financial methods used to help organisations to define and evaluate its relative success, typically in relation to the company's long-term goals.



Note! Within the user administration in Mamut Online Desktop, the administrator can decide which users should have access to Company Dashboard. Read more about user administration in the section "User Administration".

Getting Started with Company Dashboard

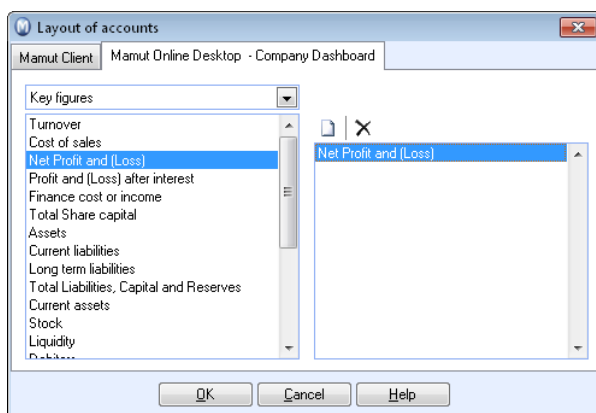


In order to get started with Company Dashboard, you must first connect to Mamut Online Desktop. The synchronisation between Mamut Business Software and the Company Dashboard is based on Mamut Online Desktop.

You can read more about connecting to Mamut Online Desktop in the section "Getting Started".



Settings

Before getting started with the Company Dashboard on Mamut Online Desktop, there are a number of settings that must be defined in your Mamut Business Software program. For instance, you must define how the Company Dashboard will retrieve data from Mamut Business Software. These settings can be found via **View - Settings - Accounting - Accounting Settings - Layout of Accounts**.



You can define the relevant settings on the tab **Mamut Online Desktop - Company Dashboard**. In the right side of the window, you can define which groups (based on the chart of accounts) will be included in each description of the balance and profit and loss boxes in Company Dashboard (on the left side of the window). The window allows you to adjust the reports in the Company Dashboard according to your layout of accounts. Use the arrow in the drop-down menu in order to select which part of the accounting reports you want to adjust.

How to edit the default layout

1.  Click **New** in order to edit the default layout. Repeat this step for each description you wish to edit.
2. Click **OK**.
3.  Click **Delete** in order to delete your selection.
4. Click the arrow in the drop-down menu in order to add groups to the layout of accounts.

 *You have now edited the default layout and how the Company Dashboard retrieves data from Mamut Business Software.*

Users

In order to use the Company Dashboard, you must have a registered user connected to an employee in Mamut Business Software. You must also have received and accepted an invitation to Mamut Online Desktop. Read more about inviting users in the section "Getting Started".





Note! Within the user administration in Mamut Online Desktop, the administrator can decide which users should have access to Company Dashboard. Read more about user administration in the section "User Administration".

Getting Started with the Company Dashboard

When you have set up the necessary settings within Mamut Business Software, you are ready to get started with Company Dashboard.

How to get started

1. Log in to your Mamut Online Desktop account using your Mamut ID. You can log in via a web browser at www.mamutonline.com or via the focus area Mamut Online Desktop in Mamut Business Software.
2.  Within Mamut Online Desktop, click **Work Areas - Company Dashboard**.
3. A report containing 16 different presentation boxes will be displayed. These boxes represent the balance and key figures of your company.

 *You can now customise the window by hiding boxes that you do not wish to display. Most boxes can also be edited by clicking Configure this box in the upper-left corner of the box. You can customise the contents and presentation of the box. In addition, you can display most boxes in a detailed view as well as print the report (either in parts or the entire report) as a PDF document or as a Microsoft Excel sheet.*

Equipment Register



The Equipment Register in Mamut Online Desktop provides you with an online overview of your organisation's equipment. Here you are able to loan and return equipment, as well as create, view, and edit your equipment online, anywhere and at anytime.

Keep track of your equipment

The Equipment Register in Mamut Online Desktop is an online service that allows you to manage the equipment belonging to your business or organisation. Many organisations have equipment that is available for their members to loan. Therefore, it is important to keep track of who has loaned and returned what. Furthermore, the Equipment Register is integrated with the Contact module; it therefore retrieves information about your contacts and allows you to link equipment to contacts, as well as to control who has loaned what and how long the equipment is going to be on loan for.

There are three different classifications informing you of the status of the items: available (green), on loan (yellow) and overdue (red). You can easily notify your contacts via e-mail when the loan period of a piece of equipment is about to expire or has already expired. In addition, you can print several reports that will help you to keep track of your equipment.

A complete tool for all types of organisations

The Equipment Register is a tool that is suitable for all types of organisations; sports clubs, music organisations, businesses and others. The register is very flexible and can easily be customised to meet your needs. The company settings allow you to define your type of business and customise some fields to suit your needs. Through the user settings, which are personal and only apply to the respective user, you are able to customise the information displayed when working with equipment.

Getting started with the Equipment Register



In order to get started with the Equipment Register, you must first connect to Mamut Online Desktop.

You can read more about connecting to Mamut Online Desktop in the section "Getting Started".

Settings in Mamut Online Desktop

Company Settings

Before you can start using the Equipment Register you are required to define the **Type of business** in the **Company Settings**. Here you need to specify whether your company is a business, a sports club, a music organisation or other type of organisation. It is important that you are aware that the selection you define here will determine the panels and fields shown on the equipment card as well as the default values for category. To access the company settings in Mamut Online Desktop click on **Settings - Company Settings - Equipment Register**.

User Access Administration

The Super User is able to define which functionality within the Equipment Register the users of the company database are going to be able to access. For example, the Super User can restrict access to register new loans or to send e-mails from the loan card. The different access rights are defined through the User Administration screen which can be accessed by clicking **Settings - Account Administration - User Administration**.

Read more about the User Access Administration in the section "User Access Administration within Mamut Online Desktop".

User Settings

Within the **User Settings** you are able to modify the settings to suit your personal preference and specific requirements for performing daily tasks. This means that you are able to select fields, check boxes and default values that will appear on the equipment card and on the loan card. To access the user settings in Mamut Online Desktop click on **Settings - User Settings - Equipment Register**.

Settings in Mamut Business Software

Through your local installation of Mamut Business Software you are able to define some of the default values for the Equipment Register. This includes the default values for category and location as well as the values for the drop-down lists in the equipment card. You can add, edit and delete these values through the Properties Register by clicking **View - Settings - Company - Properties Register** in your local installation of Mamut Business Software.

Read more in the "Settings" chapter of the introduction manual "Settings, Reports and Filters".

Equipment

Once you have defined the company and user settings, you can start registering your pieces of equipment. .

Contacts

The Equipment Register is integrated with the Contact module; this means that it retrieves information about your existing contacts. Therefore, when loaning a piece of equipment, you are able to link the piece of equipment in question to the contact (not the contact person) that is loaning it.

Read more about the Contact module in Mamut Online Desktop in the section "Contact".

Equipment Register Work Area

When you have registered your equipment and contacts, you can start using the Equipment Register. You can access the work area by clicking **Work Areas - Equipment Register** within Mamut Online Desktop.

Business Year Planner



Business Year Planner enables you to create a structured and refined Year Plan of your company. It is designed to help you identify the company's goals and outlines the analysis, strategies and planning required for these goals to be achieved.

Through 10 simple steps, the Business Year Planner allows you to create a yearly plan for your business. Here you are able to outline what you want your company to achieve during the year ahead. Therefore, you are able to stay focused on the big picture and will not get lost in the detailed day-to-day planning. This helps you to effectively steer your company in making the right decisions. It also reduces risks and increases the chances of success for your business.

In order to create a plan, you must first set up goals for your business. The goals should be ambitions you wish to achieve and each goal should be coupled with clearly defined actions which must be performed in order to fulfil the action.

How to create a good Year Plan

While some prefer spending a lot of time on creating a complete Business Year Plan in one go, others would rather rush through the process and then add more information and increase the level of detail after going through it several times.

Some know their market and business well and dive straight into the planning part, while others have been running a business for only a few years and want to analyse their company first to confirm that the direction is good or to make the necessary changes.

We recommend that you start by getting to know the year planner before entering detailed information. For the best result, we also recommend going through all areas. This will also be a good exercise for the more experienced business professionals.



Tip! Your Business Year Plan should be a living plan that is occasionally updated. Ask yourself: Have all the actions been completed? Have you reached your goals? Do you need to add more actions in order to reach your goals?

Getting Started with the Business Year Planner


Before getting started

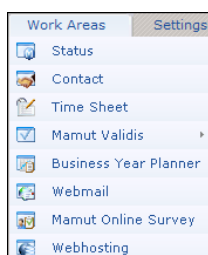


Before getting started you need to create your Mamut ID and connect to Mamut Online Desktop. Mamut Online Desktop is what synchronises your data between Mamut Business Software and the Business Year Planner.

Find out more about how to connect in the section "Getting Started".

How to get started

1. Log into Mamut Online Desktop through the web browser, using your Mamut ID. You can login directly via a web browser at www.mamutonline.com or via the Mamut Online Desktop focus area within Mamut Business Software.
2.  Once you have logged in, select **Work Areas - Business Year Planner** from the Mamut Online Desktop toolbar.



3. To start a new plan click **Create new Year Plan** at the bottom of the main page or on the top right hand side.

Create new Year Plan

4. Write in the **Name** of the new business year plan, which calendar **Year** it covers, and if it is based on an existing plan or not. If it is based on an existing plan, you can select which elements of the plan to use.

Create a new Year Plan:

Name

Year Plan for JPM Ltd

Year

2009

Based on existing plan

☐

OK

Cancel

5. Click **OK** to create the plan and proceed to **Strategy**, or click **Cancel** to go back to the home page and abort creating the plan. The name of your year plan will now be displayed as the current Year Plan on the top left-hand side of the home page.



You have now set the name and year for your Year Plan and can proceed with creating the strategy for your Year Plan.



Note! You can choose which plan to work on simply by clicking on it from the list of plans that are displayed on the top right-hand side of the home page.



Tip! When you have logged into Mamut Online Desktop, you can click Help in the top right corner. In the help section you will find more information about the functionality.

Webmail



Webmail is a service based on Microsoft Office Outlook Web Access, which allows you and your colleagues to easily access e-mails, folders and contacts via the Internet, making it as easy to work 'on the go' as from the office.

This service allows you to access your e-mail accounts without using traditional e-mail clients, such as Microsoft Office Outlook. Webmail allows you to compose, read, reply and forward e-mails in the same way you would within Microsoft Office Outlook. The most popular webmail providers include Gmail, Hotmail and Yahoo.

When compared to application-based e-mail, the major advantage of web based e-mail is that you have the ability to access your Inbox from any computer that is connected to the Internet, anywhere and at anytime. This can be particularly useful for people who are travelling, as it allows you to use your e-mail without having to carry around a laptop, or manually configuring another person's computer, as all that is necessary is a computer with Internet access. With webmail you can check or send e-mails at the library, the coffee shop, a hotel, the office or a friend's house.

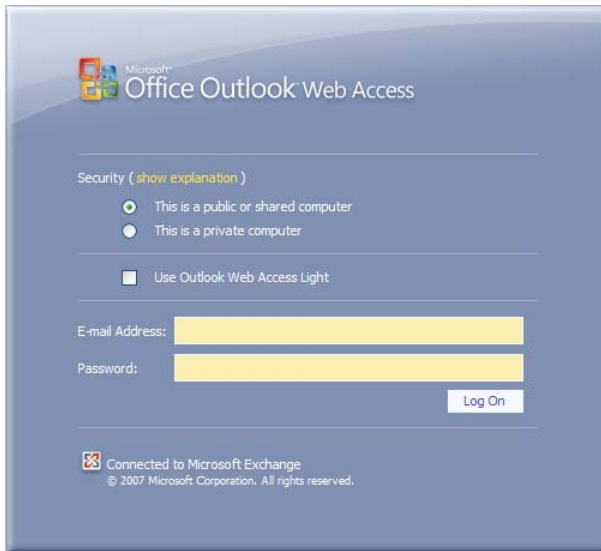


Note! In order to get started with Webmail, the system administrator must first register an e-mail account for you in MyAccount. Use the MyAccount user name/password to log in to the Webmail service. Read more about MyAccount and Webmail below.

Link to Webmail within Mamut Online Desktop

Mamut Online Desktop incorporates this e-mail service with integrated access to Microsoft Office Outlook. Simply click on **Work Areas** within the Mamut Online Desktop toolbar and then click on **Webmail**. A separate window will then appear where you are able to log in and gain access to your Inbox from anywhere in the world, at anytime.


Therefore, Mamut Online Desktop allows you increased mobility and flexibility as everything happens inside your web browser. This reduces the risk of virus attacks and saves you space on your hard drive, since all of your e-mail folders are stored online, courtesy of your webmail provider. Furthermore, there is nothing to backup as your e-mail is stored on a remote computer.



Logging in to you e-mail account from a web browser

You can log in to your e-mail account directly from a web browser from this link:
<https://mamutmail.com>.

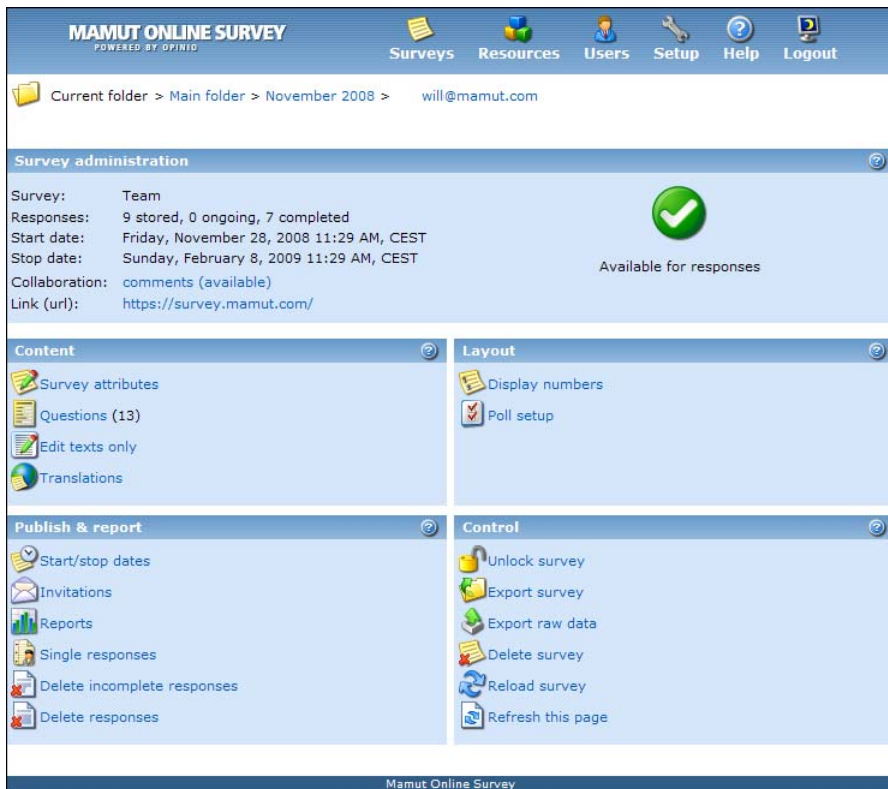
Help

 Microsoft Office Outlook Web Access has a separate help section that you can access by clicking the icon after logging in.

Mamut Online Survey

Introduction

Mamut Online Survey is an online service that allows you to easily create and publish surveys on the Internet. This powerful tool allows you to gain a better insight into your market through the use of customer feedback.



Create a Survey

With Mamut Online Survey it is quick and easy to design your own survey. You are able to create questions using the format and the content that you wish. Common question types, such as multiple choice, rankings, lists and matrices/tables are predefined and ready for you to use. You can yourself define the design and information that you need.

Receive Feedback Quickly

The program has a simple wizard that allows you to import the contacts that you would like the survey to be sent to. Invitations will be sent via e-mail. The responses you get will be recorded directly within the program. All of the information is readily available, so at any given time you are able to see what your customers think. The program also includes

functionality for sending follow-up e-mails, defining start and end dates, ensuring the same person does not respond more than once and for tracing individual responses.

Analyse the Results

Reports are immediately available once participants have responded, allowing you to follow developments as the responses arrive. All surveys have two predefined reports, the summary and comments reports, which are automatically created when a survey is published.

Scalability and availability

A survey solution must be scalable, so that it can handle large amounts of information. Mamut Online Survey has been designed to perform its tasks quickly even during very busy periods. Mamut Online Survey can handle a large number of respondents and surveys.

Several Versions of the Solution

The services that you have access to within Mamut Online Desktop are dependent on your Mamut One Service Agreement. Find out which solution is right for you within the functionality matrix that is on our website: www.mamut.com.

Getting Started with Mamut Online Survey

How to get started

1. In Mamut Business Software, click on the **Mamut Information Desk** focus area on the desktop and select the tab **Survey**.
2. Under **New user?** on the top right, click **Create account**.
3. Follow the instructions for creating a new account. You need a valid e-mail address and a password.



You are now able to log in and use Mamut Online Survey. Your username is the same as your customer number.

Logging in to Mamut Online Survey

You are able to log in via the work area Mamut Online Survey within Mamut Online Desktop, or via Mamut Information Desk within Mamut Business Software. Mamut Online Survey will then open in a separate web browser window.



Tip! You can click on **Users** and select the **Language** of your users after you have logged in.

Help

When you have logged into Mamut Online Desktop, you can click Help in the top right corner. In the help section you will find more information about the functionality.



When you are logged into Mamut Online Survey, you will find a button that shows detailed help.

Webhosting



Webhosting directs you to MyAccount, the online control panel for Mamut's hosted services. This includes your domain, Mamut eZ Publish, information portals based on Microsoft SharePoint, e-mail accounts and other hosted services.

By logging into MyAccount, you are able to manage all the hosted services included in your service agreement. You can, for example, administer your domain; manage users, languages and login information for your Mamut eZ Publish website; administer your and your co-workers' e-mail accounts as well as create a SharePoint account in order to set up a Microsoft SharePoint portal which can be used for sharing information within your organisation or with your customers.

In short, the Webhosting feature within Mamut Online Desktop provides an access point to a wide variety of web based applications that are hosted and maintained by Mamut - on Mamut's own servers. This means that you get all the benefits from Mamut's hosted services without having to invest time, energy or money in the day-to-day maintenance of the server.



Note! Only the system administrator has access to Webhosting.

Link to MyAccount within Mamut Online Desktop

In the **Work Areas** menu you will find the link **Webhosting** which takes you directly to the MyAccount login website.



Note! When you have purchased Mamut One, you will receive an e-mail containing the MyAccount login information. Via MyAccount, the system administrator can manage the services included in your service agreement as well as create users for some of the services.

Logging in from a web browser

You can log in to MyAccount directly from the following link:

<https://myaccount.active24.com/>.

Sales

Sales work area gives you online access to the most important functionality in sales. Create & edit quotations & sales orders, generate order confirmations as PDFs and view existing quotations & orders, invoices & credit notes, anywhere & at any time.

In the Sales work area you will find information about customers, stock, cost price and gross margin on product lines. Thus, the Mamut Online Desktop Sales work area gives you the possibility to create quotations or sales orders, as well as print out a quotation or an order confirmation directly at your customer's office. All changes you make to quotations/orders or settings in Mamut Business Software, which affect stock levels, warehouse location, VAT handling and payment terms, will be synchronised and updated in Mamut Online Desktop as well.

Overview over supported actions

From the following table you can see which sales functionality is available from Mamut Online Desktop, sorted by status.

Status	View	Create	Edit
Quotation	Yes	Yes	Yes
Order basis for batch order	Yes	No	No
Unprocessed sales order	Yes	Yes	Yes
Unprocessed batch order	Yes	Yes	Yes
Unissued credit note	Yes	No	Yes
Backorders	Yes	No	Yes
Invoice (not delivered)	Yes	No	No
Invoice	Yes	No	No
Credit Note	Yes	No	No



Note! You can also register a quotation/sales order as a **Lost sale** and as a **Cancelled order** in Mamut Online Desktop. However, all other status changes, such as an order to an invoice, must be done via Mamut Business Software.

Getting started with Sales



You must first connect to Mamut Online Desktop in order to access the Sales work area. Read more about connecting to Mamut Online Desktop in the section "Getting started".

The Mamut Online Desktop Sales work area is closely integrated with the Mamut Business Software Sales module. In order to adjust the work area to suit your company's needs, please make sure that your company settings in Mamut Business Software are correct. You can also adjust the work area to suit your personal work-flow via the User Settings for Sales in Mamut Online Desktop. After you have made these adjustments you will be able to take maximum advantage of the Sales work area.

Settings in Mamut Business Software

The company settings for Quotations/Orders/Invoices in Mamut Business Software apply also to your Sales work area in Mamut Online Desktop. You can adjust these company settings via **View - Settings - Company - Settings per Module** in Mamut Business Software. Click **Product** or **Quotation/Order/Invoice**. You will find detailed information about these settings in the "Settings" chapter of the introduction manual "Settings, Reports and Filters".

Through Mamut Business Software you can define values for the drop-down lists in the Sales card. You can add, edit and delete these values through the Properties Register by clicking **View - Settings - Company - Properties Register** in Mamut Business Software. Read more about the Properties Register in the "Settings" chapter of the introduction manual "Settings, Reports and Filters".



Note! The online sales functionality presumes that you have registered products and customers before you start registering quotations/sales orders, and products must be registered in the product register in Mamut Business Software (**View- Product - Product Register**). Customers can be registered in both in Mamut Business Software and in Mamut Online Desktop.

Settings in Mamut Online Desktop

Administer user access

The Super user invites other users to Mamut Online Desktop. Read more about inviting users in the section "How to Invite Users to Mamut Online Desktop".

Furthermore, the super user defines which sales functionality the user(s) can access. The different access rights can be configured in the administration window for user access, which can be found under **Settings - Account Administration - User Administration**. Possible access rights for **Custom access** in the Sales work area are: **View own sales orders, Change own sales orders, View all sales orders** and **Change all sales orders**. Read more about the Access administration above.

User settings

After the super user has defined the user access, a user can log into Mamut Online Desktop as described above. Here users can go to **Settings - User Settings - Quotation/Sales order** in order to choose which information and check boxes they wish to display in the sales work area. One of the reasons for defining the user settings could be to avoid displaying sensitive information about your company's revenue and margins. This might be relevant if you are visiting a customer and wish to create new quotations/sales orders.

Report Archive

The Report Archive provides you with an online overview of documents and reports published from Mamut Business Software. You can view, print, or save a copy to your computer; thus giving you the flexibility to work with them anywhere and at anytime.

Mamut Online Desktop

On Mamut Online Desktop you can administrate online documents and reports that have been published from Mamut Business Software. This can be done under **Lists - Report Archive**. It is also possible to view the documents/reports, print them and/or save a copy to your PC.



Tip! When doing changes to a document or report you will have to save a copy of it to your PC. The original document/report on Mamut Online Desktop is not writable.

Read more about documents and reports on Mamut Online Desktop in help.

Mamut Business Software

In order for a document or a report to be available in the Report Archive in Mamut Online Desktop, it must first be published from Mamut Business Software via the following modules.

- You can publish a report directly from Mamut Business Software on Mamut Online Desktop via **File - Print**.
- You can publish a document to Mamut Online Desktop from Mamut Business Software via the document list via **View - Document - Document List**.

Below, you can find more information about publishing documents and reports from Mamut Business Software to Mamut Online Desktop.

Getting started with the Report Archive

Connection to Mamut Online Desktop

In order to get started with the Report Archive, you must first connect to Mamut Online Desktop. The synchronisation between Mamut Business Software and the Report Archive is based on Mamut Online Desktop.

You can read more about connecting to Mamut Online Desktop in the section "Getting Started".

Administration of documents and reports

Each report and document that is published on Mamut Online Desktop has a separate document card in Mamut Business Software. Via the document card you can change the heading or add a note. From the document list in Mamut Business Software you can publish documents to Mamut Online Desktop. In addition, you can use this list to remove documents and reports from Mamut Online Desktop.

Published documents and reports cannot be larger than 2 MB. When a document exceeds this limit, for example due to large image files, it must be adjusted manually before it can be published. If you wish to control the size of an unpublished document, you will find the file path in the **Folder** field on its document card.

You will find more information about administrating documents and reports in Mamut Online Desktop in help.

How to publish reports from Mamut Business Software to Mamut Online Desktop

1. Open **File - Print** in Mamut Business Software.
2. Select the report you wish to print.
3. Choose **Mamut Online Desktop** from the **Send to** list.
4. Click **Print**.
5. Some reports require more detailed information or settings. Please enter the information according to your needs and confirm it.
6. Enter a **Heading** which will be shown in the list with the reports.
7. If you want to publish additional **Notes**, you can enter the text in the **Note** field.
8. If you want to see a preview of the report, click the **Preview** button.
9. If the report's document card is supposed to open after the report has been published, check **Open the document card after have clicked 'Publish'**.
10. Click **Publish**



The report will be published immediately. If you have chosen the option in point 9, the report's document card will be opened. Here you will find the publishing date, your name as Author and the status Published. The heading you have entered will be in the Heading line and the notes you have added will be below the Notes tab.



Tip! Press **[F1]** in the window for publishing reports in Mamut Business Software to open a detailed description of the functions.

How to publish documents from Mamut Business Software to Mamut Online Desktop

Not only can you publish reports to Mamut Online Desktop, but also other document that is linked to your company database. You can find those documents in the document list.

1. Open the document list in Mamut Business Software via **View - Document - Document List**.
2. Select the document you wish to publish to Mamut Online Desktop.
3. Click the **Duplicate to Mamut Online Desktop** button in the toolbar.
4. You can now change the **Heading** or add a **Note** to the Online Document which the users in Mamut Online Desktop can open and read. The document cards of published documents contain some specific information. The **Type** is **Online Document**, the **Status** is **Published** and the **Folder** is **[Published Document]**. Each document card that shows this information refers to a document that is published on Mamut Online Desktop.
5. Click **OK**.




If Mamut Business Software is connected to Mamut Online Desktop, the document will be published immediately. The document list contains the original document and it's duplicate. The duplicate will have the status Published.

How to remove a document or report from Mamut Online Desktop



Note! Take careful consideration as to whether you wish to delete a document or report. There is no copy of published reports saved in Mamut Business Software. A document that has been published on Mamut Online Desktop may no longer be identical to the original document in Mamut Business Software.

1. Open the document list in Mamut Business Software via **View - Document - Document List**.
2. Select the document/report you want to remove from Mamut Online Desktop. Published documents/reports always have the status **Published** and the type **Online Document**.
Tip! If your document list does not display these columns, you can integrate them via the user settings tab **Document List**.
3.  Click **Delete**.
4. A warning will be displayed. Click **OK**.




The document or report will now be deleted from Mamut Online Desktop. It will no longer be available online.



Tip! You can also remove a report/document directly via its document card. Click **Delete** and confirm that you want to delete it.

How to edit notes or the heading of a published document/report

If you want to edit the notes or the heading of a document/report that is published on Mamut Online Desktop, you must follow the below steps:

1. Open the document list in Mamut Business Software via **View - Document - Document List**.
2. Select the document/report whose notes or heading you want to edit.
3.  Click **Edit** to open the document card.
4. Change the heading or the notes in the **Notes** tab according to your needs.
5. Click **Save**.

 *The information will be synchronised and can be read by the users in Mamut Online Desktop as soon as the synchronisation is completed.*

Mamut Online Desktop FAQs

How can I grant other user's access to Mamut Online Desktop?

You are able to grant others access to Mamut Online Desktop by logging into the application and navigating to **Settings – Account Administration – User Administration**.

Invite User gives you the possibility to choose who will receive an invitation from a drop-down list of your users and employees.

User Administration contains a list of all of your users in Mamut Business Software. The list also gives you information about who has been invited to use Mamut Online Desktop and who has not yet received an invitation.

Note! You can only invite users who are registered as users or employees in Mamut Business Software.

Who can connect to Mamut Online Desktop? Which preconditions must be met in order to connect?

This functionality is only available for the super user in Mamut Business Software. The super user must be linked to an employee in the employee register.

Name, the complete address, phone number, e-mail and company registration number must be registered in Mamut Business Software. The name, contact person and phone number must be registered in the licence for Mamut Business Software.

How can I restore a backup copy of a company database which is connected to Mamut Online Desktop?

You cannot restore a backup copy when you are connected to Mamut Online Desktop. In order to restore a backup copy, you must first disconnect the company database currently connected to Mamut Online Desktop. You can then restore the backup.

All web based access to the company database is disabled when you disconnect from Mamut Online Desktop. When the backup has been restored you can re-synchronise if you wish to continue using Mamut Online Desktop.

Note! You should disconnect and restore at a time when other users are not using Mamut Online Desktop and Mamut Business Software.

When synchronising for the first time I receive the message: “An error occurred during the synchronisation service”. What is wrong?

Other users cannot be logged into Mamut Business Software during some parts of the first-time synchronisation. The synchronisation should be performed when no other users are logged into the company database that you are synchronising.

API users and Mamut Business Software integrations with other software must be disabled when synchronising for the first time.

Only the synchronisation service can have access when synchronising for the first-time.

As a Mamut Online Desktop user, can Mamut be used to restore my company database?

No. The database in Mamut Online Desktop does not contain enough data needed for restoring a database in the event of a computer or system crash.

Some buttons are not displayed within Mamut Online Desktop

If some buttons are not displayed within Mamut Online Desktop, this may be caused by the settings in your web browser. JavaScript must be supported in order for all functionality to be displayed.

Allow JavaScript in your web browser in order to solve the problem.

How secure is Mamut Online Desktop?

The security of Mamut Online Desktop is maintained in several different ways. All information in your company database is protected by a firewall when you are logged in to Mamut Online Desktop via a web browser or via the work area in Mamut Business Software.

All communication between Mamut Business Software and Mamut Online Desktop is encrypted (SSL). This means that all synchronised data is secure.

Mamut Online Desktop requires that you log in again if you have been inactive for 20 minutes. This prevents others to gain access to your data if you have forgotten to log out.

Please note that to a large extent, you are responsible for your own security by choosing a secure password. Use a unique password that only you know.

What is Mamut ID? How do I create an account? How do I open an account that has been locked?

Mamut ID is a common login service for a range of applications and services provided by Mamut. The Mamut ID is not the same as the user name and password you use to log into Mamut Business Software.

You must create a Mamut ID in order to access Mamut Online Desktop. Create the Mamut ID in the first synchronisation wizard in Mamut Business Software or via an invitation from a company database administrator on Mamut Online Desktop.

Note! The user name, which is the user's e-mail address, cannot be changed.

If your account has been locked due to too many failed login attempts, you can open it again by using the forgotten password function.

What is displayed in the drop-down list in the company settings for Mamut Online Desktop for Mamut Business Software?

The drop-down list displays from which computer the synchronisation will be performed. You are recommended to synchronise from the computer where the company database is located.

If the computer used for synchronisation is turned off, the synchronisation will be terminated. Any other available computer will be used after 15 minutes.

How long does it take to perform first time synchronisation of a company database with Mamut Online Desktop?

There is no definitive answer to this question, but important factors which influence the synchronisation time are the size of the company database and the speed of the Internet connection.

Note! You cannot use the program, and other users should be logged out, while synchronising for the first time.

I no longer wish to use Mamut Online Desktop. What do I have to do and what happens to the database on Mamut Online Desktop?

You are able to disconnect if you no longer wish to use Mamut Online Desktop. You can disconnect by navigating to **View - Settings - Company - Settings per module - Mamut Online Desktop** in Mamut Business Software.

Click **Disconnect** and follow the wizard. You must log in with your Mamut ID in the first step of the wizard. You must then enter the same user name that you used when synchronising for the first time. Confirm the disconnection in the wizard's next step.

The synchronisation is terminated and the database is disconnected. Disconnected databases will automatically be removed from the server, with the exception of data used if you want to re-connect at a later time (for instance, company information and information about users and access).

How do I reconnect to Mamut Online Desktop?

Only users that are registered as "Super users" in Mamut Business Software have access to the functionality for Mamut Online Desktop in the company settings. They are therefore also the only users that can reconnect to Mamut Online Desktop.

To do so, go to **View - Settings - Company - Settings per module - Mamut Online Desktop** and Click the button **Reconnect**.

How are synchronisation conflicts handled?

A conflict will be registered if a user in Mamut Business Software and a user on Mamut Online Desktop edit the same field in the same item (for instance, change the name of the same contact) during the same synchronisation session.

The conflict is logged in the synchronisation history and will contain information on how the conflict was handled.

In such instances, the change made in Mamut Business Software will always override the change made via Mamut Online Desktop.

However, if a user in Mamut Business Software and a user on Mamut Online Desktop edit different fields in the same item (for instance, the phone number and fax number of the same contact) during the same synchronisation session, the system will not register a conflict.

What do I do if the synchronisation between Mamut Business Software and Mamut Online Desktop has been terminated?

If the data synchronisation has been terminated and no new entries have been logged in the synchronisation log, this may indicate that the synchronisation service has been stopped.

You can verify this by completing the following steps:

1. Go to **Start – Control Panel – Administrative Tools – Services**.
2. Locate **Mamut Synchronisation Service** and verify the status in the **Status** column.
3. If it does not state **Started**, click **Start Service** on the toolbar.
4. Restart Mamut Business Software.

The synchronisation has now been restored.

The changes I make on Mamut Online Desktop are not registered in Mamut Business Software (or vice versa). What is the problem?

Check that the computer used for synchronisation is turned on. The name of the computer is specified on the Synchronisation tab in **Company Settings – Mamut Online Desktop**.

You should then check to see if this computer can connect to the Internet. The information will only synchronise if the Internet connection is active.

How to confirm that the synchronisation service has not been stopped:

1. Go to **Start – Control Panel – Administrative Tools – Services**.
2. Locate **Mamut Synchronisation Service** and verify the status in the **Status** column.
3. If it does not state **Started**, click **Start Service** on the toolbar.
4. Restart Mamut Business Software.

The synchronisation has now been restored.

Read the synchronisation log in Mamut Business Software. Data will be synchronised continuously every 15 seconds. If the entry reads **OK**, including the current time, please contact the Mamut Support Centre.

If the topmost entry reads **Error**, click the button below the list in order to view the error message. Remember to keep this error message at hand when contacting the Mamut Support Centre.

How does the notes field work on Mamut Online Desktop?

In order to add a note to a contact or contact person within Mamut Online Desktop, you must switch to the edit mode. Click **Add text** to the left of the note field and enter the text in the window that opens.

Note! You cannot format text in the notes field in the same way as in Mamut Business Software.

Click the RTF button to the left of the notes field in order to open the text in the rtf format in a Word document. This feature is useful if there is a large amount of text in the notes field. Changes made here will not be saved within Mamut Online Desktop.

Files pasted into the notes field in Mamut Business Software cannot be opened via Mamut Online Desktop.

More information

Service and Support

Mamut Service Agreement

The service agreement gives you the right to make use of the Mamut Support Centre.



Mamut Support Centre

The Mamut Support Centre offers an extensive personal service programme to assist you whenever you may need help. Under the heading **Support** at www.mamut.co.uk/support, you are also able to use the Article search database to find specific tips and tricks that will help you when trouble shooting within the program. Here you will also find a link to the 10 newest support articles and the 10 most read support articles.

How to get in touch with the Mamut Support Centre

Get in touch through the program



The easiest way of getting in touch with the Mamut Support Centre is via the program. The **Mamut Support Centre** focus area allows you to search for answers and send new queries. The status of and answers to your query can be found in the same place. In order to use this feature in the program, you must be connected to the Internet.

Get in touch by e-mail

If you cannot find the answer you are looking for on the Mamut Information Desk or in the online article database you can send an e-mail to support@mamut.co.uk.

Get in touch via fax 020 7153 0901

If you do not have Internet access, you are able to send your query by fax to the Mamut Support Centre. You will receive an answer by fax as well. However, please do provide a telephone where you can be reached during working hours in case we need more information in order to solve your problem.

Get in touch over the phone: 020 7153 0900

Most questions can usually be answered in the course of a phone call but in special cases we may need to record the question and contact you once we have found the solution to your problem.

Letters may be sent to:

Mamut Software Ltd
90 Long Acre
Covent Garden
London WC2E 9RZ

The Mamut Service Agreement

The Mamut Service Agreement ensures that you are prepared and have full control of all challenges you or your business may encounter.

Updates following legislation changes

We make sure that your Mamut system is always fully up-to-date with new laws and regulations, changes to tax-rates and official forms. Extensive user documentation for all such changes ensures that you can adapt to them quickly and easily.

New functionality

Mamut systems are developed and improved continuously in tune with technological advances, new industry standards and trends and feedback from our customers. You are always guaranteed a modern solution, which will simplify your working day.

Mamut Support Centre

We place great importance on providing a responsive and professional support department, which can promptly provide answers to your questions. Your Mamut Service Agreement entitles you to user support via telephone, e-mail, Internet or directly from within your program.

Mamut Information Desk

Within the program you will find an Internet-powered news channel that provides you with daily updates of information, news and user tips directly related to your program and area of business. The Mamut Information Desk lets you communicate directly with our support department as well.

Tips for users

At regular intervals, interested users will receive e-mails with tips about using their Mamut system, news about the product range and other useful information.

Mamut Knowledge Series

Mamut publishes documents and advice on a range of areas including changes from the government, effective use of the system as well as new trends.

Special offers

Mamut gives you special offers on Mamut products as well as on suitable products from other market-leading software vendors.

Additional Manuals and Guides

Mamut Knowledge Series

Mamut is constantly updating the user documentation. These updates are necessary in order to align the documentation with changes in the Mamut system, new and updated functionality that has been incorporated into the program, new laws and regulations along with useful tips that can help simplify your working day. The latest version of the manuals and guides are published to the Mamut website on a regular basis; where they are available for download free of charge. To download any of the documents or guides simply go to the **Download** page of the Mamut website: www.mamut.com/uk/download.

On the Mamut download page you will find the link to the manuals and guides near the bottom of the page: **Mamut Business Software - Documentation & Guides**. Here you will find a list of manuals and guides, each containing a brief summary, which you are able to download and utilise to learn more about specific areas of the program.

Mamut Additional Products and Enterprise Extensions

Mamut offers a number of additional products and enterprise extensions that allow your company to use Mamut Business Software more efficiently. These are available for purchase for those using the Mamut Enterprise series and who require more advanced functionality than what is included within the standard Mamut program. This will allow your business to function more effectively with the Mamut system. Mamut publishes manuals and guides about the additional products and enterprise extensions to the Mamut website. These are updated regularly based on changes, updates and new functionality. You can access these manuals and guides on the Mamut website: www.mamut.com/uk/download and download them free of charge.

Get started with Mamut Online Desktop

This manual provides an introduction to Mamut Online Desktop. You will find a brief description of how you are able to get started, the settings that must be created both in Mamut Business Software and Mamut Online Desktop along with information regarding how you are able to align the system to meet your needs. Furthermore, you will also find a description of the different work areas and how you are able to navigate within them.

You can access this manual free of charge via our website: www.mamut.com/uk/download. All of the manuals and guides produced by Mamut aim to provide you with an overview of the area of interest and to provide you with the necessary information along with tips and tricks to enhance your knowledge. They are defined to be as user friendly as possible, and therefore open as a pdf in your browser set to your screen size, with an easy to navigate structure.

Mamut Academy

Courses at Mamut Academy

Mamut Academy is the name of the course activity offered by Mamut.

Mamut Software Ltd. supplies complete solutions in financial management, sales and contact management, purchasing/logistics, human resources, time sheets/projects and tax/personal finance.

The courses offered by Mamut Academy are for people who wish to work with Mamut and in associated fields as efficiently as possible. They therefore allow you and your colleagues to really make use of the abundance of functions in the Mamut systems; which will stimulate both your business along with the people using them!

Online courses

In addition to classroom courses Mamut also offers online courses. Online Courses are for those people who wish to participate in courses via the Internet. Here you are able to connect to the course via your office computer, with the possibility of connecting to a telephone conference with audio playback. It is worth noting that this course focuses on demonstrating/discussing the functionality, with exercises being performed on your own initiative once the course has been completed.

If you require further details regarding dates and content of the courses offered, please contact us via phone 0800 032 5616 or e-mail at academy@mamut.co.uk.

Mamut Tutorials

Mamut offers you the possibility to watch tutorials from within the program as well as from our home page. To access the tutorials that are available within the program, simply click on the **Introduction to Mamut** focus area and select the tutorial that you wish to watch. Here you will also find a link to additional tutorials that are available online. Mamut's tutorials provide you and your colleagues with short videos of Frequently Asked Questions (FAQs) free of charge. These videos include short and easy-to-follow instructions demonstrating different processes within the system.

You can access a list of available online tutorials at www.mamut.co.uk/tutorials.

If you have special requests for tutorials, please feel free to contact us at academy@mamut.co.uk.

Mamut Alliance Partners



Founded in 1994, Mamut (OSE "MAMUT") is a leading European provider of complete, integrated software solutions and internet services for SME's. Mamut offers complete and user-friendly solutions at the best value for money, integrating CRM, sales force, logistics, accounting, e-Commerce, domains, email, web hosting and security. More than 400,000 European customers simplify their daily business with solutions from Mamut. Further information about Mamut and the company's products can be found at www.mamut.co.uk

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A company in

