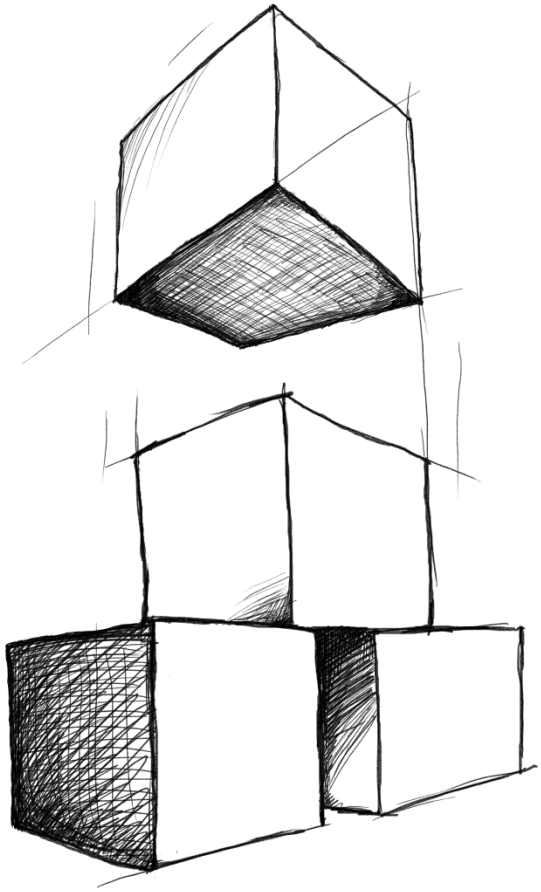

// Mamut Business Software

Complete CRM, Sales Management and Web Solutions

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Welcome as a Mamut User

The three introductory manuals, "Settings, Reports and Filters", "Complete CRM, Sales Management and Web Solutions" and "Financials, Logistics and Human Resources", aim to provide you with a brief introduction to the program. These manuals can be downloaded free of charge from Mamut's website at www.mamut.co.uk/download.

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. For further information about more comprehensive versions, please contact us via e-mail: info@mamut.co.uk or on 0800 032 5616.

It is important that you read the Mamut User Agreement before or during installation. The agreement gives you an overview of the terms and conditions of the agreement that apply between you as a customer and Mamut Software Ltd. as supplier. The Mamut User Agreement is enclosed in the product package, but can also be found on www.mamut.com/uk/license/. By installing, you accept the terms and conditions that are outlined in the Mamut User Agreement.

The introduction manuals will provide you with a basic description of how the system is set up, how to navigate through it, and how you can customise it to suit your own needs. The manuals will also give you an introduction to the main elements of the program and how to perform the most common tasks.

Some features are described in more detail within the program's help files [F1]. In addition to the introduction manuals, Mamut also offers additional user documentation that is continuously updated in accordance with new and improved functionality in the program. The latest version of the documentation is published regularly on our website, where you can download it free of charge. Go to the Download page on our website in order to download the documentation: www.mamut.co.uk/download. We would also like to remind you about our Support website www.mamut.co.uk/support, where you will find answers to the most frequently asked questions about Mamut. It is designed to make it as easy as possible for you to search for answers to any questions you may have - 24 hours a day.

Best of luck with Mamut Business Software!

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Chapter 1: Contact Management

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The functionality described in this chapter may be either partly or fully available within your program version. You will find a detailed overview of all of the functionality included in all Mamut products on our website at www.mamut.com/uk/functionality.

If you are unable to find the answer you are after within this chapter, you can refer to the More Information chapter where you will find tips on how you can get further help. If you wish to order or receive more information regarding Mamut products, you can contact our sales department at sales@mamut.co.uk or by phone on 0207 153 0900.

Contact Management

The **Contact Management** module is where you maintain all information on your contacts.

Please note that contact management consists of customers, suppliers and, possibly, partners and 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) module as an independent registry by clicking **View - Contacts - Contact persons**. You can also launch the module by double clicking the contact person linked to the contact, within the **Contact Management** module.

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. The Contact work area allows you to view and edit the contacts and contact persons already registered within Mamut Business Software. In addition, you can create new, edit and manage all information related to your contacts.

Note! 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.

How to Register a new Contact

During the registration of a new contact, you select the type of contact it is. This allows you to register a contact as both a customer and a supplier, without having to register the same contact twice. To get an overview of purely customers or suppliers, you are able to use the filter to separate the two, and can for example print a Contact list from the Report module.

When registering a new contact, the only required field is the contact name. The procedure below describes the standard registration of a new contact. You are also able to find out about the various fields available for contact management.

How to register a new contact

1. Click **View - Contacts - Contact Management**.
2. Click **New**.
3. Enter the contact's name in the top field.
4. Enter the contact's address into the address field.
   -or-
   Click on the **Address** button and enter each part of the contact’s address into the opening window. If you register more than one address for a contact, e.g. invoice and delivery

addresses, you can select the type of address you wish to use, by clicking the arrow button next to the relevant field and making your selection.

5. Enter the contact's **Telephone** and **Fax** numbers. Use the arrow buttons if you want to register more than one number.
6. Enter the contact's **E-mail** address.
7. Select an employee from your company under **Our reference**. This person will be responsible for any future follow-ups. In order to have an employee available in this drop-down list, you must first register all your employees within the **Employee Register**.
8. Select any combination of contact types, **Customer**, **Supplier**, **Partner**, or **Private** that apply to the contact.

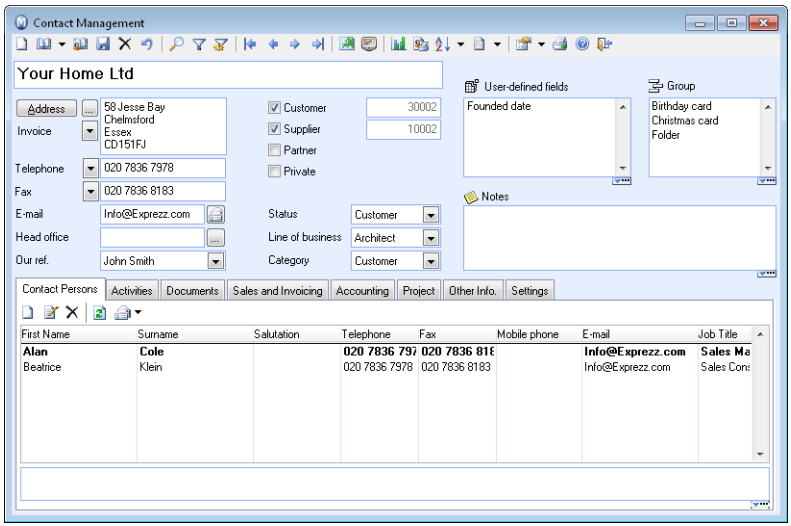
   The program automatically assigns all contacts a customer number (even if the contact is not a customer). If the contact is also a supplier, the program automatically assigns a unique supplier number to the contact.

You can find out more about how to organise and keep up-to-date with your contacts in the section 'About organising and managing contacts'.

The Contact Management Register

The contact card is divided into two components. In the top half, you enter basic information about the contact, and determine which categories the contact will belong to. This categorisation will help you to distinguish between your contacts, so that it will be possible to send them customised material at a later point.

The bottom half of the contact card consists of a number of tabs where you can add relevant information regarding the contact, e.g. data regarding contact persons, activities, documents, sales and invoicing, accounting, projects, purchases and quotations. Read more about the tabs in a separate section.



Address: Click the Address button to register the contact's address(es).

Head office: Use the Head office functionality if you would like deliveries and invoicing to go to different customers.

User-defined fields: You can classify and segment your contacts by using the user-defined fields.

Group: By entering a value in the Group field, you can define accurate and efficient filters.

Notes: Here you can enter any type of text.

New: Create a new contact.

List: Click here to open the contact list. Within the user settings for contact management you are able to select whether you want the contact list to display automatically or not when you open the contact module. It is a useful option if you are looking for various contacts. If you register new contacts you might want to keep it turned off.

Contact persons List: Displays a list of all contact persons.

Delete: You can delete contacts which contain no references to other modules. An alternative method is to set the contact as **Inactive**.

View map: Click this button to view the contact's address on a map. The map opens in a separate window and an Internet connection is required for it to be viewed.

View travel route: Displays the travel route from your address to the contact's address. An Internet connection is required for it to be viewed.

Tip! You can choose the map service provider in the user settings for contact management. You can choose between Yahoo and Google.

The **Contact status** button supplies an overview of all purchase and sales transactions that have taken place between the contact and your company. What's more, it also provides additional key figures. This overview will give you quick access to the contacts sales history, and can be useful when you are on the phone.

By clicking the **Standard Document** button in the toolbar, you can access a number of document templates which can be used to create standard documents for individual contacts.

By using the **Sorting** button you can sort your contacts in a number of different ways: By **Contact name**, **Contact number** or **Supplier number**. Just select the desired sorting criteria by clicking on the arrow to the right of the sorting button.

By clicking on the arrow button to the right of the **Create activities** buttons you can create customised activities. You decide on the content for the activity yourself and which modules the activity template will be available in.

Click the **User settings** button in the toolbar and select the **Contact card** tab. Under the **Other** tab you select the check box "Automatically open contact list when opening the contact card". Click the arrow button in order to access the **Company Settings**.

Click **Print** if you want to print some contact specific reports, for example address labels. A new window will open where you can choose the report and further define the desired settings.

TAPI button: When you click the TAPI button the program will automatically call the phone number in the field belonging to it.

> **Note!** This button will only show if you have the necessary equipment installed. All drives need to support TAPI 3.0 or higher and the phone needs to be connected to your computer via a serial port.

With **Skype** you can ring contacts from the contact or contact person card. You can also receive phone calls. If the contacts are registered with a **Skype name** and **Skype number** in your contact or contact persons register, the contact's card will open in connection with Skype calls. Calls to/from existing contacts are logged as activities so that you can easily access historic information for the contact later. Read more about the Skype integration in a separate section.

Read more about the buttons on the tool bar in the chapter "User Interface" in the introduction manual "Settings, Reports and Filters".

Contact Management Tabs

Different ways of using tabs and modules

You can select how to use the tabs in **Contact Management**. There is no right or wrong way of using them, so find a way that suits you best. Two variations are described below:

Entering new information from the tabs in Contact management:

The **New** button in the various tabs can act as a shortcut to the different modules, for example, If you click **New** in the Sales and Invoicing tab, the Sales and Invoicing module will open automatically and the contact information registered on the order will be retrieved directly from the contact register. This way you create new orders from **Contact Management** via the **Sales and Invoicing** tab.

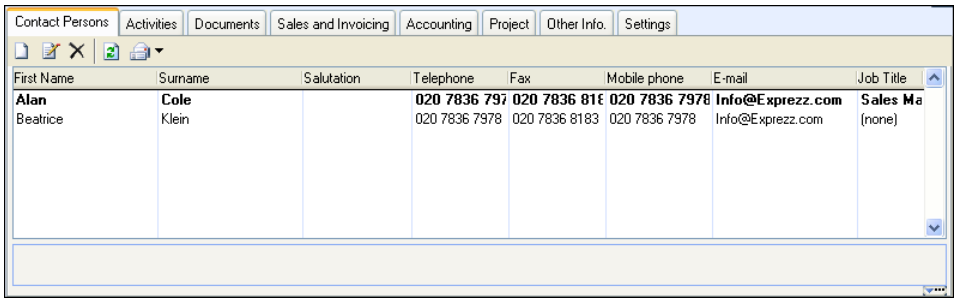
Entering new information in other modules:

You can also enter information directly into the different modules. If you select this method, you can enter new orders by selecting **View - Sales and Invoicing - Order registration**. This could be preferable if you mainly enter orders and do not work with specific contacts. In this case you can use the contact register for an overview on activities, documents and orders linked to each contact. The exception for this method would be the for the Company contact, Other info and Settings tabs, as these are directly linked with the contact module and cannot be opened from other modules.

Exceptions for this working method are the **Company Contact**, **Other Info** and **Settings** tabs because these are directly related to the Contact module and cannot be accessed from other modules.

Contact Person

Under the **Contact Person** tab you enter information about people you have been in contact with or that you know within a specific company. This will make it easier for you to find the people you want to talk to or refer to in various situations.



The person you select as the Default contact will be shown in bold at the top of the list of Contact Persons. Any contact persons you select as **Inactive** will show in grey at the bottom of the list. Those who are neither default nor inactive will be listed in the order they were registered.

By clicking **New**, you can register a new contact, or choose **Edit** to change or edit an existing contact.

By clicking **Delete**, you are able to delete the selected contact person.

Click this button to update the contact person with the latest information from the contact person register.

You are also able to send an e-mail to the Contact Person by clicking **Send E-mail**.

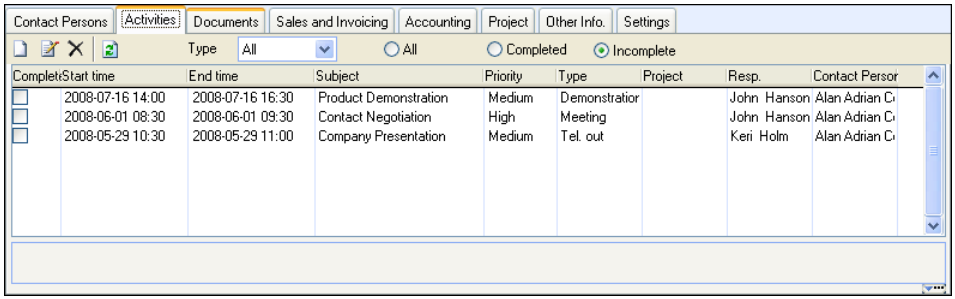
Any notes registered on the selected contact person are displayed below the list. Click the **Expand Note Field** button in the lower right corner to display the entire text.

Tip! In the user settings for contact person, you can choose to display the middle name field.

Read more about contact persons in a separate section.

Activities

Activities linked to the **Company contact** are registered under the **Activity** tab. All information relating to the activity, such as the Company contact, Project, Type, Responsible person within your company etc is entered here. Registered activities could be meetings, demonstrations, telephone conversations, e-mails, confirmation of delivery and price quotations.



Click the **New** button in order to create new activities. Click **Edit** if you wish to edit your existing activities.

By clicking **Delete**, you are able to delete the selected contact person.

Click this button to update the activity with the latest information from the activity module.

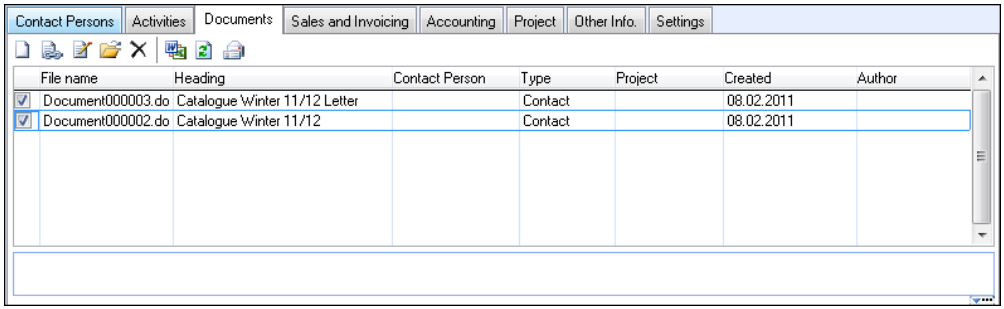
In the **Type** drop-down menu, you are able to sort which types of activities you want the tab to show. You can also select whether or not to show **All, Completed** and **Incomplete** activities. If a large number of activities are registered to the contact, you can choose to display only a certain activity type from the **Type** drop-down list.

Any notes registered on the selected activity are displayed below the list. Click the **Expand Note Field** button in the lower right corner to display the entire text.

You can read more about editing activities in the chapter "Activities and Calendar".

Documents

The **Documents** tab gives an overview of all documents related to the contact. Documents can include letters, minutes from a meeting, contracts, faxes etc. All documents that you create from this tab will also be available from the **Document** module. Here you can create new and edit existing documents. By right-clicking a document in the list you can choose between opening, printing or sending it via e-mail or fax. You can also import documents to the list.



Click **New** to create a new document.

> **Note!** If you create a merged document and try to delete it while a contact is linked to the merged document, you will receive a warning saying that the document will be deleted for all contacts linked to it. This will give you the opportunity to cancel the action unless you actually want to delete the document for all linked contacts.

With the help of the **Link** button, you are able to link documents to the contact. When you have selected a document and clicked **OK**, a window will be displayed in which you can enter more detailed information about the document.

> **Note!** You cannot unlink the contact from the document by clicking the **Delete** button. If you click **Delete**, a message box will inform you that the document will be deleted from the system and the computer if it does not contain any other links. If you want to unlink the document, you must click **Edit** instead. You must then navigate to the **Contact** tab and click **Delete** in order to delete only the link (and not the entire document).

Click the **Edit** button in order to edit existing documents.

Open the selected document.

Here you can **Delete** the selected document(s). Documents with a link to other areas will only be unlinked from this location.

Click the **Import document(s)** button to import documents stored on your computer.

Click the **Refresh** button to update the document information.

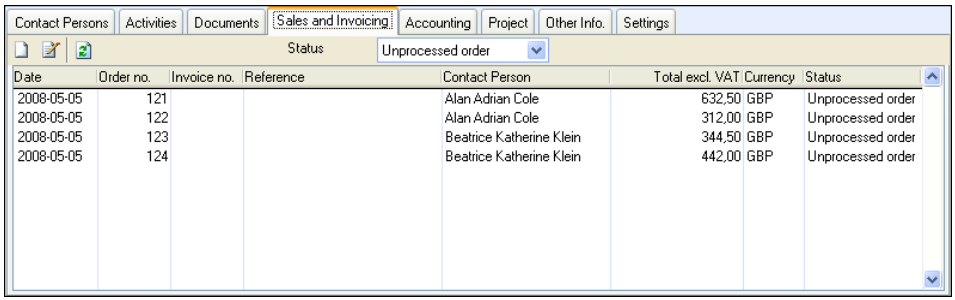
Via **Send e-mail** you can send documents directly to the contact: Select the check box next to the document(s) you want to e-mail and click **Send e-mail**. Your default e-mail editor for Mamut Business Software will open with the selected document(s) attached. Note, that you cannot attach merge documents.

Any notes registered on the selected document are displayed below the list. Click the **Expand Note Field** button in the lower right corner to display the entire text.

Find out more about documents in a separate section.

Sales and Invoicing

The **Sales and Invoicing** tab in the contact card is only available for contacts marked as **Customers** and is accessed by going to **View - Contacts - Contact Management - Sales and Invoicing**. The tab displays an overview of orders and invoices that are registered to the contact.



It is possible to create a new order by clicking on the **New** button, or to edit an order by clicking the **Edit** button.

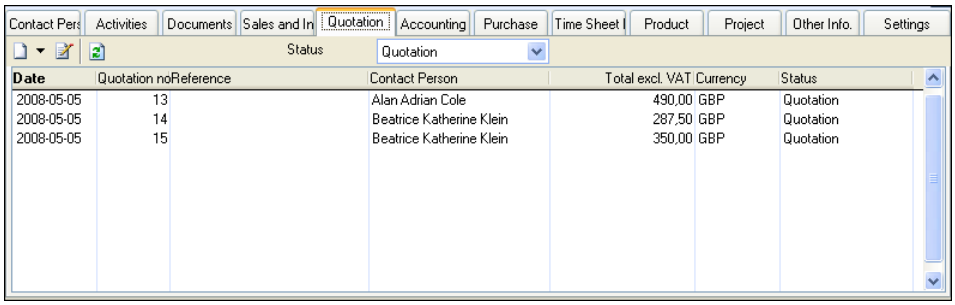
The Sales/Invoicing tab displays an overview of orders and invoices that are registered to the contact.

You can use the **New** button as a short cut to the Sales and Invoicing module: By clicking the **New** button the Sales and Invoicing module opens automatically with the contact information which has been registered to the orders. In other words, you can create new orders directly from the Sales and Invoicing tab within the Contact module.

Note! The **Status** drop-down list on the **Sales and Invoicing** tab acts as a filter. The selections you make here determine what is shown in the tab. If you select **Invoice,** the tab will only show invoices that are registered to the **Contact Person** and not other sales transactions such as unprocessed orders and credit notes.

Quotation

The **Quotation** tab in the contact card is available for contacts that are registered as Customers. It provides an overview of quotations issued to the contact.



You can use the **Quotation tab** to create regular and repetitive quotes. You can do this by clicking on the arrow to the right of the **New** button and choosing from the list shown.

By clicking on **Edit** you will be directed to the Quotation register where you are able to edit the information that is connected to the quotation.

Here you are able to update information about a quotation that has been registered within both the quotation tab and the quotation register.

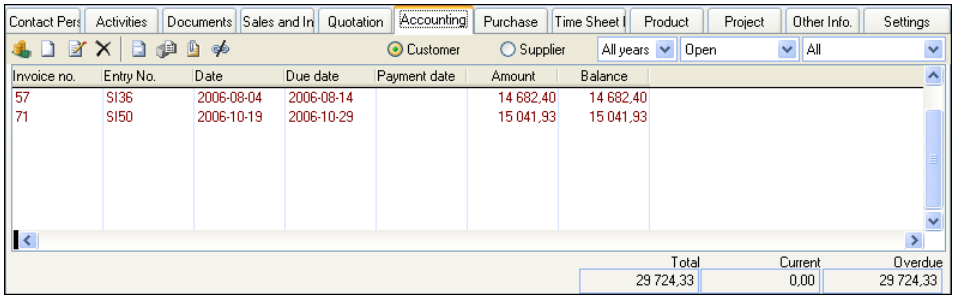
Note! The **Status** drop-down list in the **Quotation** tab acts as a filter. The choices you make here determine what is shown in the tab. If, for example, you select **Quotation repeating**, the tab will only show group quotations and no other categories.

Read more about the **Quotation** module in a separate section.

Accounting

The **Accounting** tab shows all account entries against the contact person within the Financials. If the contact is a customer, all receivables will show. If the contact is a supplier all liabilities are shown. If the contact is both customer and supplier, you can select which of the lists you want to be shown.

The tab can be used as a sort of 'mini ledger' where you are given an overview of all ledger items as well as the amounts for **Total, Current** and **Overdue**. You can register payments and credit notes and you can match open items against closed ones. You can also enter new invoices from the tab. Note that all actions under this tab are registered *directly* into the **Nominal Ledger**.



Here you are able to register receipts and payments for open items in the customer and supplier ledger. Read more about receipts and payments in the chapter "Accounting" in the book "Financials, Logistics and Human Resources".

Tip! It is also possible to register receipts and payments in the journal register.

By clicking on the **New** button you are able to register sales invoices (for the customer) or purchase invoices (for the supplier) in the journal register. You can also choose to do so in the journal register window, which you can read more about in the chapter "Accounting" in the book "Financials, Logistics and Human Resources".

Click on the **Edit** button if you wish to edit the customer or supplier ledger. This can also be done in either the **Customers Ledger** or the **Suppliers Ledger**, which can be found under the **Accounting** focus area.

By clicking here you are able to invoice a credit note, which is then sent to **Financials**. Read more about **Financials** in the chapter "Accounting" in the book "Financials, Logistics and Human Resources". Here you are able to open the marked invoice, and eventually edit the invoice information. Read more about Order/Invoice in the chapter "Sales Follow-up".

If the contact that you have opened is a supplier, you are able to click on this button in order to go to the purchase register and view the information that is connected to the marked invoice.

If you click on this button you will be taken to **Financials** where the marked journal is stored. Read more about **Financials** in the chapter "Accounting" in the book "Financials, Logistics and Human Resources".

Shows scanned journals.

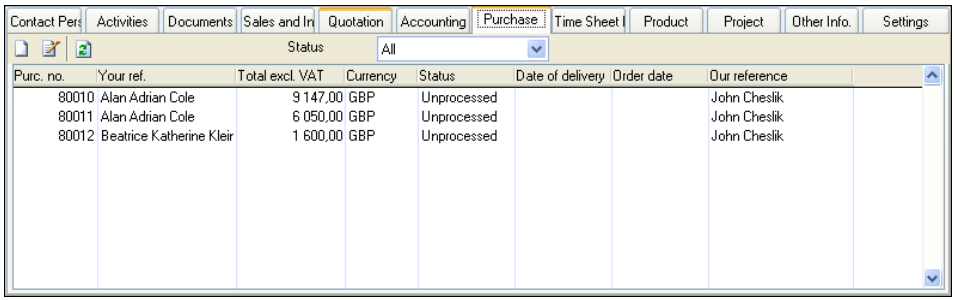
With the Match/link items function, you are able to connect or close multiple open items against each other. In order to do so the particular items must be registered for the same customer or supplier. You can close items (**Match**) if the total of the item is equal to zero. If the total of the item is not equal to zero, they will be connected (**Linked**) and can be closed at a later point.

The drop-down list to the right of the icons can be used to filter and select the information that you want to be displayed. You are able to select which year you wish to display the information for, whether you wish to display open or closed items or both, and finally you are also able to select if you would like to display information about the contact that is connected to **Invoice**, **Bank/Petty ash**, **Credit Note** or **Invoice/Credit note**.

Tip! For an overview of all outstanding amounts, we recommend that you use the customer and supplier ledgers, in which all customers and suppliers are incorporated within the same list. You can also generate payment reminders, debt collection claims and interest calculations from this module.

Purchase

The **Purchase tab** is active for contacts that are suppliers and will help you see what purchases have been made by the supplier. It provides an overview of purchases registered to the contact. You can see the **Purc. no**, **Your ref.**, **Total excl. VAT.**, **Currency**, **Status**, **Date of delivery**, **Order date** and **Our reference**. You can also filter purchases in the various status settings.



In this tab, you can easily keep track of all purchases made from this supplier. You can also create new purchases using the **New** tab. The **Purchase module** will automatically open with the contacts details from the contact card.

Click the icon to update the purchase information with information from the purchase module.

You can also edit an existing purchase order by marking it, and clicking the **Edit** button. The selected purchase order will open and you can make the necessary changes.

Note! The **Status** drop-down list acts as a filter, allowing you to decide what will be shown on the screen. If you select **Received**, only the orders with this status will be shown.

Read more about purchases in the chapter "Purchasing" in the introduction manual "Financials, Logistics and Human Resources".

Time Sheet Input

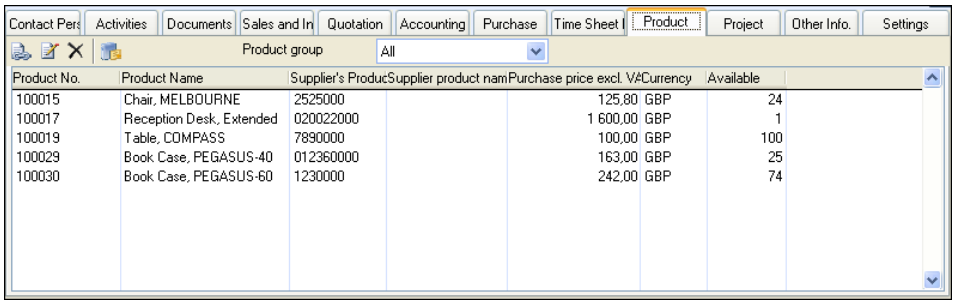
Time sheet input is available for contacts that are marked as customers. Here you will be given an overview of the contact's time sheet lines.

While it is possible to edit time sheet lines via the tab, new time sheet lines must be created within the Time sheet input module.

> **Note!** The **Status** drop-down list acts as a filter. The choices you make here determine what is shown in the tab.

Product

The **Product tab** in the contact card is available for contacts that are registered as suppliers and provides an overview of the products that are available from this supplier. You can easily check price and availability in your own stock and add, edit or remove products. You can see your own name and product number, the supplier's product number and name, purchase price, currency and availability in own stock in the corresponding columns. You can also filter by product groups.



New: Opens the product list so that you can link a product to the supplier. When you have chosen a product by clicking **OK**, a window is shown in which you can add more detailed information about the product, such as the supplier's product number and purchase price.

Edit: The detailed product information window also opens if you click **Edit** after selecting a product from the list.

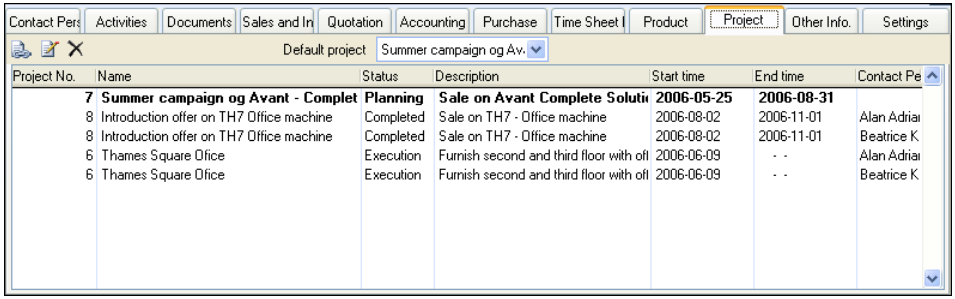
Delete: Click **Delete** to remove the link from the supplier to the chosen product. Note that this does not delete the product itself from the product register.

Go to product card: This will open the product card from the product register.

Product group: You can select to view a particular product group or all product groups at the same time. The drop-down list is a filter that makes it easier for you to find the product you are searching for.

Project

The **Project** tab displays all projects that the contact is participating in. For example, if you wanted to send out an information letter in connection with a project, you can create a merged document and filter all the contacts connected to the relevant project.



With the help of the button **Link** you are able to link a project and/or multiple contact persons to a project.

By clicking on the button **Edit**, you will be directed to the Project Register where you are able to edit the information regarding the project.

Here you are able to delete the contacts link to the project. Note that you are only deleting the contacts link to the project, not the actual project.

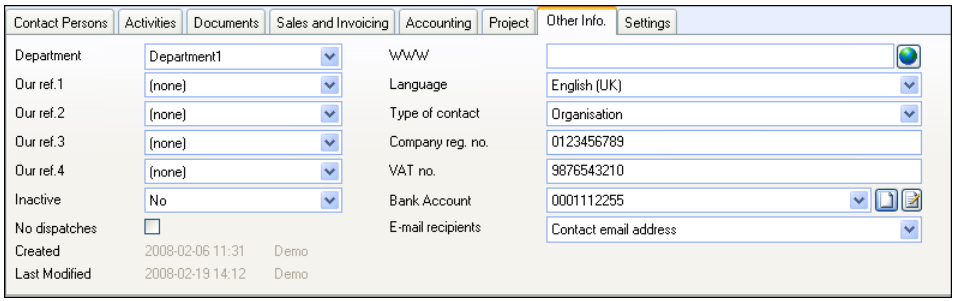
Note! From the Project tab you only have access to active projects. Initially, a project is always active but you can mark it as inactive in the **Inactive** drop-down list on the project card.

Tip! If a contact is linked to several projects, you can select a default project from the **Default Project** drop-down list in the **Project** tab. The project will be suggested for all activities and documents registered to the contact.

Read more about **Project** in a separate section.

Other Info

In the **Other info** tab you can enter useful information about the contact. The tab gives you a quick overview and makes it easier for you to find relevant information when communicating with or managing your contacts.



Department: Specify which department in your organisation is responsible for managing the contact.

Our ref.: Assign one of your employees as responsible for managing and communicating with the contact. You can specify four references in descending priority.

Inactive: Even if you cannot delete a contact that is active in other places within the program, you can select to set the contact as inactive. To do so, select **Yes** from the **Inactive** drop-down list. Once you have done this you will be asked if you want to deactivate the contact persons as well. So you are able to select to keep the company contacts as active even though you no longer have anything to do with the contact.

If you want the contact to remain active, select **No** from the **Inactive** drop-down list.

No dispatches: If the contact does not wish to receive information (e.g. offers and advertising from you) you can tick the **No dispatches** box. When you place a filter in connection with a planned information dispatch you can avoid including customers who do not wish to receive any marketing mail from you by defining this in the filter settings.

WWW: The web address is accessed by clicking on the icon **Go to WWW-page**. When you click the icon the web browser opens on the selected page.

Language: Select which language should be used when communicating with the contact.

Type of contact: Specify whether the contact is an **Organisation** or a **Private Individual**.

Company reg. no.: Enter the contact's company registration number in this field.

VAT no.: Enter the contact's company VAT number in this field. This is of particular importance for international customers: If this field is empty, a warning will be presented when using VAT codes for intra community supply of products/services on orders or offers.

Bank Account: The drop-down list contains the contact's bank accounts, if you have already registered this information. You can add new bank account by clicking **New** to the right of the drop-down list, or edit an existing bank account by clicking **Edit**.

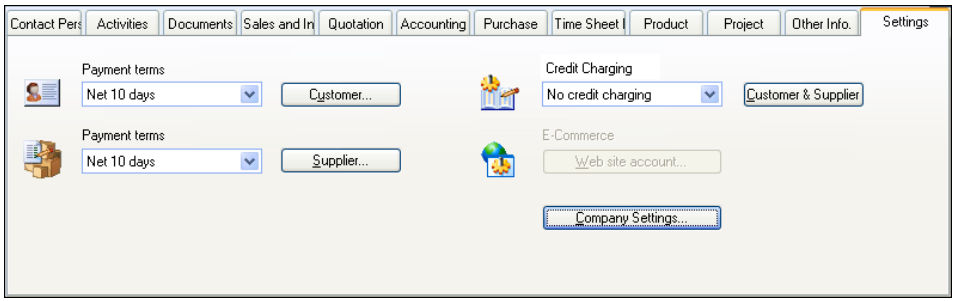
Note! When adding a bank account to an already existing supplier, the bank account will not be linked to any existing purchase orders registered on that supplier. You must edit the purchase, for instance when running the remittance wizard, and select the bank account manually.

E-mail recipients: Choose how you want to select e-mail recipients when communicating business documents via e-mail. This setting will override the settings defined in the company settings for contact management.

Tip! At the bottom of the page you can see when the contact was registered, as well as when and by whom it was modified last.

Settings

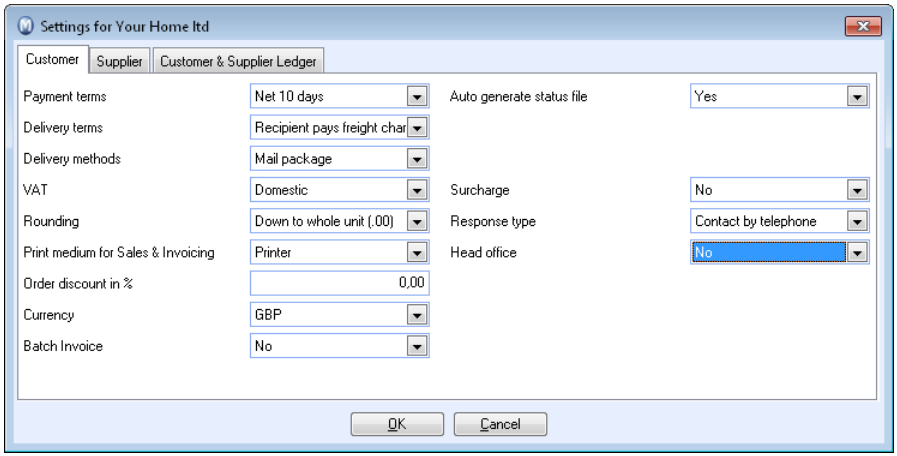
The **Settings** tab allows you to define the settings for **Customer**, **Supplier**, **Accounts ledger** and your **Website account**. The tab can be accessed by clicking **View - Contacts - Contact Management**. You are able to tailor each contact. The information you enter here is important, as it is transferred to the **Sales and Invoicing** module when you create a new order for a contact.



Note! What settings are available depends on whether or not the contact is a customer or supplier.

Customer

Click the **Customer** button to specify the settings for contacts who have customer status.



Payment terms: Select which payment terms should apply to the customer.

Delivery terms: Select which delivery terms should apply to the customer.

Delivery methods: Select which delivery methods should apply to the customer.

VAT: Select which form of VAT applies to the customer.

Rounding: Select in which way you want amounts to be rounded.

Tip! The above-mentioned settings will be used as default values when you create an order for the customer.

Print medium for Sales and Invoicing: Select how the customer will receive Sales orders/Invoices from the drop-down list. This setting is relevant if you have selected **Transfer from the contact** from the drop-down list **Print medium for Sales & Invoicing** in the user settings for reports. If you want to e-mail the Sales order/Invoice you need to use Microsoft Outlook® and to have a registered e-mail account for the customer.

Order discount in %: To give the contact a flat discount on all orders, enter the percentage in the field **Order discount in %**. The percentage you enter here will then automatically be deducted from the price of an order. Read more about discounts in the chapter "Sales Follow-up".

Currency: Decide in which currency you would like to invoice the customer. The currency choice you make here is the currency chosen for your Company database. The currency will automatically be used on orders you create in the **Sales and Invoicing** module. Note that you can override the contact's currency on orders in the **Sales and Invoicing** module.

Batch Invoice: If you select **Yes** in the **Batch Invoice** drop-down list, when you create a new order in the **Sales and Invoicing** module, the order's status will be set to **Unprocessed batch order**. If you select **No** in the **Batch order** drop-down list when you create a new order in

the **Sales and Invoicing** module, the order's status will simply be set to **Unprocessed order**. Note that you can override these settings on individual orders.

Auto generate status file: It is recommended that you select **Yes** in this drop-down list.

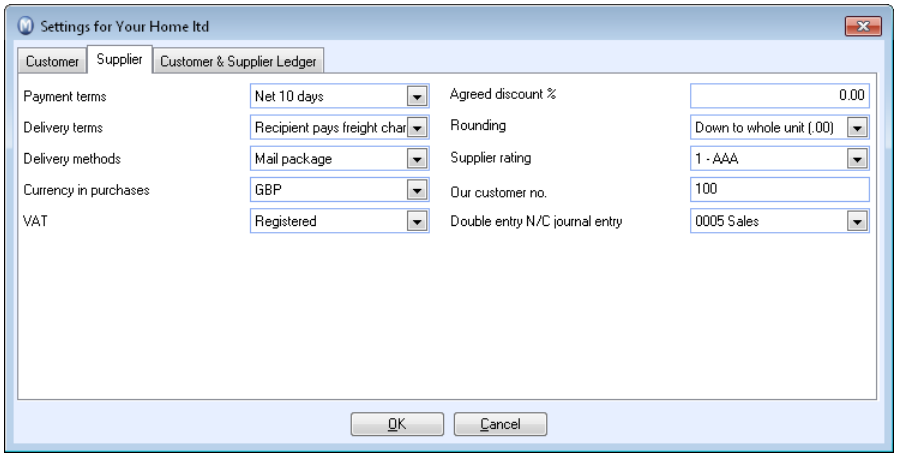
Surcharge: Select whether or not the customer should pay a **Surcharge**.

Response type: Select the response type that applies to the customer; choose from the drop-down list.

Head office: If several of your contacts are part of the same chain, you may want to invoice head office for all sales. If the contact constitutes one such **Head office**, select **Yes** from the drop-down list. Other customers can then be set up with the **Head office**.

Supplier

If the contact is marked as supplier, the **Supplier** button will be active. Here, you can state the terms for any purchases you make from the supplier.



Payment terms: Select which payment terms should be applied.

Delivery terms: Select which delivery terms should be applied.

Delivery methods: Select which delivery methods should be applied.

Currency in purchases: Select which currency should be used when registering a purchase.

VAT: Select which form of VAT should be applied.

Note! Each new purchase from this supplier will be registered under these terms. You can however override the information for each new purchase.

Agreed discount %: If you have a fixed discount with the supplier, enter the amount in this field. The discount you enter will be automatically deducted from the purchase total when you register a new purchase.

Rounding: Select in which way you want amounts rounded.

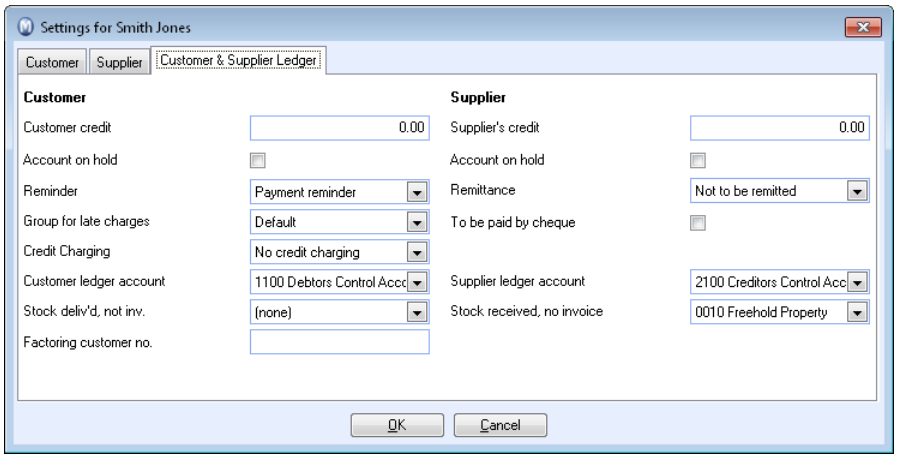
Supplier rating: If you have two suppliers for the same product, you will naturally wish to order from the supplier who gives you the best terms; therefore, a field is set up for supplier rating. Here you can select from the highest A grade, 1 AAA to the lowest, 5C. The evaluation is available in the Purchase module in those cases where you have several suppliers to choose from. Note that you can change the values shown by right-clicking in the drop-down list and selecting **Change in properties register**.

Our customer no.: Enter your own customer number in the field as an easy reference for the supplier.

Double entry N/C journal entry: From this drop-down list you can select the account to use when registering a purchase invoice from the supplier from the chart of accounts.

Customer & Supplier Ledger

In the **Customer & Supplier Ledger** settings you can specify customer and supplier credit details; you also enter if the customer or supplier should be sent payment reminders.



Customer credit and **Supplier's credit**: Use these drop-down lists to limit your customer and supplier credit. You will be notified that the credit limit has been exceeded if you attempt to register/invoice an order/delivery.

Account on hold: You can select whether a customer's or supplier's account should be put on hold by selecting this check box. Accounts on hold will show a symbol for credit block in their contact card and in the Customer & Supplier Ledger's **List of Suppliers** and **Customer list**. You will receive a notification letting you know the account is on hold when trying to register orders or make purchases.

Reminder: Select **Payment reminder** if you want to send payment reminders to the customer. Select **Factoring** from the drop-down list if the customers' accounts receivables should be sent to a factoring company.

Group for late charges: Select to which group for late charges the customer belongs.

Credit Charges: Choose whether or not to credit charge the customer.

Remittance: Select the default payment for purchases from this supplier. If you choose **To be remitted** the default payment is remittance and bank files for remittance will contain the items of this supplier if all settings are used correctly. Read more about remittance in the introduction manual "Financials, Logistics and Human Resources", chapter "Accounting".

To be paid by cheque: Select the check box if the amount will be paid by cheque.

Customer ledger account and **Supplier ledger account**: Customer payments are usually credited to account 1100 the Debtors control account, and supplier payments to account 2100 the Creditors control account. You can override these if other accounts apply.

Stock delivered, not invoiced: Select which account should be used for stock that has not been invoiced.

Factoring customer no.: In this field you can enter the customer's factoring number.

Tip! You can change default settings by right-clicking on several of the drop-down lists and selecting **Change in properties register**.

Website account

Click this button in order to define the contact's access to password-protected websites. Users will generally already have been approved via the process **Get website data**; however, you can change any approval or rejection here. Read more about this in a separate section.

Company Settings

Click this button in order to open the company settings.

Website Account

Note! The functionality is only accessible if you have a licence for the additional product Mamut Enterprise PartnerWeb.

In help (F1), you can find more information about the contact settings for e-commerce.

User Settings for Contact Management

You can use the **User settings** button on the toolbar to tailor the contact management window to your own requirements. You can also select **View - Settings - User - Settings per Module**, and click **Contact**.

Here you can view the fields and tabs you are able to select when working with contact management. You can also set up default values for newly created contacts. Default values are available for **Our reference**, **Status**, **Line of business** and **Category**. You can also select whether a new contact is to be automatically created as a **Customer**, **Supplier**, **Partner** or **Personal**. An example of another setting that you can select is whether the program is to automatically copy a new address into empty address types.

The window consists of three tabs: **Default setup**, **Contact card** and **Tab**.

Default Setup

You can select from three pre-defined settings.

Standard: Keeps the screen as clear as possible showing only some of the fields.

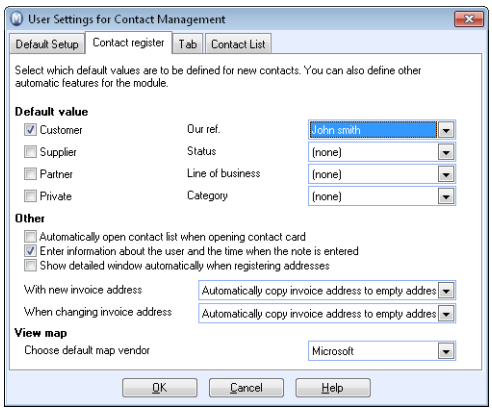
Normal: Displays standard fields and makes standard functions available.

Advanced: Displays all available fields and more functionality.

Click the relevant button to select an option. If you wish to customise the window, you can do so under **Tab**.

Contact Register

This is where you specify guidelines and default values for newly created contacts.



Default value: These values will be automatically filled in when you create new contacts. You can save a lot of time if new contacts can be given default values. The default values are not permanent and can be overridden for each individual contact. You can select

whether the contact will be set up as **Customer**, **Supplier**, **Partner** or **Private**. You can also set default values for **Our reference**, **Status**, **Line of business** and **Category**.

Note! By right-clicking in the drop-down lists for Status, Line of Business or Category, you can edit the values in the Properties register.

Other: You can select whether you want:

- Inactive contacts to be displayed in the contact list.
- The contact list to open automatically when the contact card is opened.
- Information on the user and time to be registered when **Notes** are added.
- A detailed window to appear automatically when entering an address.

Entering a new invoice address: Select what the program should do when a new invoice address is added to the contact. The three options are: Automatically copy to empty address types, select the address types to be updated with the address, or never copy to other address types.

Changing an invoice address: You have the same three options when changing invoice addresses.

Map Search: Select map service provider. The setting refers to the features **View map** and **View Travel Route** to contacts or contact persons. An equivalent setting can be found in the user settings for contact person.

Tab

You can customise which tabs will appear in the contact management window by ticking the boxes next to the various tabs. We recommend that you un-tick any tabs you do not use to keep the window as clear as possible. By clicking one of the buttons in the **Default Setup** tab, the contents will change accordingly.

Under **Other** you can select whether the totals in the **Quotation, Sales and Invoicing and Purchase tabs** shall be displayed including VAT.

Contact List

Choose which columns you want to display in the contact list and define the settings. Please note that the window cannot display more than 5 columns.

Sorting when the contact list is opened: How the list is sorted when you open the contact list. In the window, you can choose how to sort the list by clicking the column headers. Please note that if you have un-checked columns included in the sorting, the sorting criteria will revert to the preceding settings.

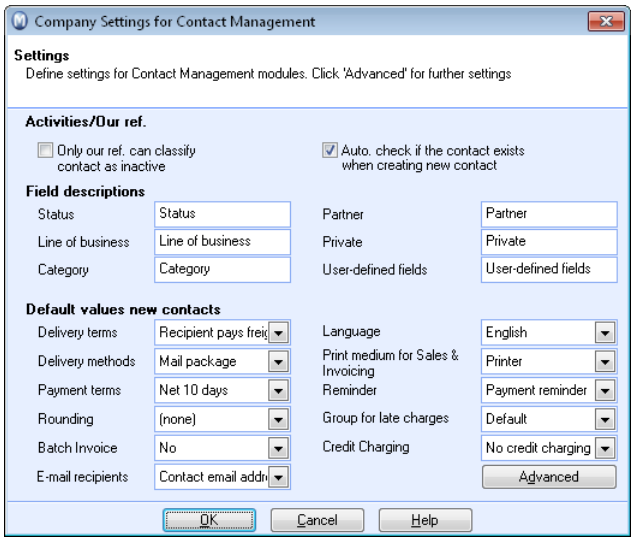
Default selection in contact list: Pre-defined selection when the contact list is opened. Use this setting if you also want to view inactive contacts. You can override the setting when the window is open.

Tip! The system administrator can use the access controls to limit or increase the users' access to the user settings.

Company Settings for Contact Management

In the Module settings for **Contact Management**, you make settings that will apply to new contacts that are created in the Contact register. Settings that are not applied will have no affect on contacts that are already in the register.

Click the arrow button next to the **User Settings** button on the toolbar in order to access the company settings for contact management. You can also go to **View - Settings - Company - Settings per Module - Contact Management**.



Activities/Our references

Mark the **Only our ref. can classify contact as inactive** check box if you don't want anyone other than the person linked to the contact, to set the contact as inactive.

By marking the **Auto check if the contact exists when creating new contact** check box, you are able to avoid registering the same contact more than once. This can be useful if several people register contacts.

Field descriptions

If you want another description of the **Status**, **Line of business**, **Category**, **Partner**, **Private** or **User-defined fields** in the contact register, you can overwrite the existing titles with your own texts in the fields.

Default Value for New Contacts

Here you can decide which description will apply for the new contacts you create. You are able to overwrite this in the contact card for each contact person if desired.

Here you can, for example, choose to round off to the nearest pound on the contact card.

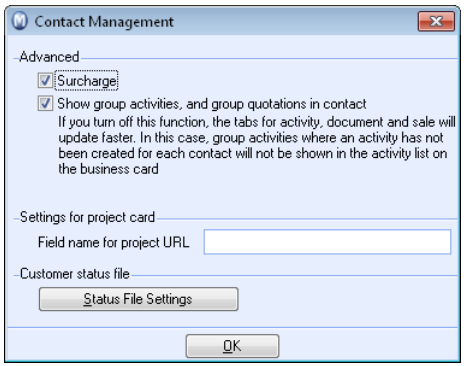
E-mail recipients: Applies to Sales and Invoicing, Purchase and Quotation. Choose which e-mail address will be the default recipient of the e-mail. You can choose between a contacts e-mail address, the e-mail address list or a reference field. If you choose e-mail list, a list with available e-mail addresses will appear when you select e-mail as printer. The reference field applies to the contacts references; from quotes and orders to invoices. You can overwrite this setting for every individual contact on the contact card.

Delivery/Payment terms

This is where you decide which terms will apply for new contacts that are created. You can override terms in the contact card for each contact if necessary.

Advanced

When you click the **Advanced** button, a new screen opens. You can mark and change the following functions:



Surcharge: Check the box if you want to be able to add surcharges/environmental taxes when invoicing customers.

Show group activities and group quotations in the contact card: If you create activities or quotations for more than one contact at a time, you can mark these to be show in the contact register for each contact.

Settings for project card: Specify the field name where you enter the URL in the Project register.

Status file settings: This button opens a new screen where you can make settings for customer status files.

Organising and Managing Contacts

The most basic classification of contacts is pre-defined by the program and can be made via the tick-boxes for customer, supplier, partner and private in the contact card. If a contact is both a customer and a supplier, you simply tick both the boxes. This allows you to edit the contact information that applies to the contact, both as a supplier and a customer.

With the help of **Groups** you can classify your contacts so that they become easier to filter later on. You can use any group you like to categorise your contacts even more thoroughly in order to be able to filter them when you want to send tailor-made information to a specific section of your customers. You can choose contacts from certain groups through the **Filter** function, which you can find in the toolbar at the top of the contact card and in the **Report module**.

Status, Line of business and Category separate the contacts for reports, searches and filter settings. They are all part of the properties register, which means you add new options by right-clicking into the drop-down list and then selecting to **Change in properties register**.

In the contact card you can link contacts to a head office by clicking on the **Search** button next to the **Head office** field. To be able to connect a contact to a head office, the contact that is the head office will need to be marked as such. Using the head office function can be of use if you are looking to deliver goods to one contact but invoice another.

Through **User-defined fields** you are able to classify your contacts according to your own criteria; by dividing contacts into groups you have self defined groups. To create a new group in the drop-down list, go to **Settings - Company - Properties register** and then select **User-defined fields.**

Contact register management

Many users find new ways of dividing their contacts after having worked with the contact register for a while already or when new needs arise. The wizard to change the values for a selection of contacts (see below) is the ideal tool for updating and maintaining the contact register, and it allows you to change values for a selection of contacts simultaneously. For example, you can add or remove group fields and user-defined fields, change common values (such as 'Our ref.' or 'Line of business') or change the settings for customers and suppliers such as payment terms, delivery terms, currency and language.

By using the contact selection wizard, you can define and save fixed filters for contacts. These can be used at a later time if you, for instance, want to create activities or documents related to the contacts or send e-mails. The selection wizard can help you save a lot of time. Learn more about the contact selection wizard in the introduction manual "Settings, Reports and Filters".

Microsoft® Outlook® Integration

With the help of the **Outlook integration** you can keep your contact register up-to-date in Outlook as well as within the program. You can link the contact's e-mail addresses in Outlook to contacts and contact persons in the program and you can ensure that the contacts you create will be synchronised both 'ways'.

Inactive

You cannot delete a contact that is in use in another part of the program. If you do not want a contact to be available anymore, you can set that contact to the inactive status. To do so, select **Yes** in the **Inactive** drop-down list under the **Other info** tab.

No dispatches

Some contacts do not wish to receive bulk mail, such as information about special offers, by e-mail. Under the **Other info** tab you can tick the **No dispatches** box. Using the advanced selection when creating bulk mail, you have the possibility to exclude these contacts.

View Map and Travel Route to the Contact

View a Customer's Location on a Map

You can display a contact's or contact person's address on a map. The map is displayed in a separate window. Open the contact or contact person and click **View map**. The map view refers to the registered address.

View Travel Route from Your Address to the Contact's

You can display the travel route to the contact. Open the contact or contact person and click **View travel route**. The travel route feature uses your address as the point of departure. The travel route is displayed in your web browser and can easily be printed for future reference.

In order for the system to calculate a travel route, you must enter a **Delivery Address** under **View - Settings - Company**. This will be used as the point of departure. The Delivery Address is used since many companies use post office boxes instead of postcodes. The travel route feature can only calculate the travel route from your address.

The map and travel route features require an Internet connection.

Tip! You can select the map service provider by going to the user settings for contact and the user settings for contact person.

The Contact Filter Wizard

You can use the wizard to change values for a selection of contacts simultaneously, such as removing or adding group fields or user-defined fields, change common parameters such as **Our reference** or **Line of business,** or change settings such as payment terms, delivery terms, currency or language.

The wizard may save you a lot of time while managing your contact register, as you do not have to enter each contact card to make the changes.

You can also create and save fixed queries you are running regularly. The last step of the wizard also lets you chose between four routines for the use of the filter, the creation of documents, the sending of e-mails and more.

Start the wizard from the menu **View - Contact - Change values for a selection of contacts**.

Tip! In help (F1), you can find more information about the wizard for changing values for a selection of contacts.

User-defined Fields

The **User-defined field** allows you to classify your contacts according to your own needs, and you can also group your contacts after your own wishes.

For a software company, for example, a possible user-defined field might be 'Licence expiry date'. The value in this case would be the date when the licence expires.

Allocating a user-defined field to a contact

1. Click on the icon directly to the left of **User-defined fields**
   -or-
   Click the **Search** button at the bottom right of the field.
2. Select the **Field type** from the drop-down list and enter its **Value** in the text box below. The field type could be, for example, 'District' with the value 'north', or 'Number of employees' with the value '15'.
3. Click **OK**.

   New User-defined fields are created in the Properties register, which you can access by going to View - Settings - Company - Properties Register. You can also adjust the alternatives for the Type of value drop-down list here.

Groups

Groups allow you to classify your contacts in order to filter out particular groups. You can select any number of available groups to better categorise your contacts in order to filter them out, and send them customised material. You can select contacts placed in a particular group with the **Sort** function in the toolbar of the **Contact** card and in the **Reports** module.

Allocating a contact to a Group

1. Click the icon next to **Group** to make the contact part of a group.
   -or-
   Click the **Search** button at the bottom-right of the field.
2. An overview of all the **Available** groups is on the left side of the window **Group**. Click the desired group, and transfer it to the field **Selected** with the single arrow button in the middle of the two fields.

   The contact is now part of the chosen group.

Note! New groups are created in the Properties register, which you can access by going to **View - Settings - Company - Properties register**.

Head Office/Branch Office

Within **Contact management** you can link a contact to a **Head office** by clicking the search button next to it. The contact needs to be marked as **Head office**. This might be useful if you would like deliveries and invoicing to go to different customers.

How to create a Head Office

1. Select **View - Contact - Contact management**.
2. Find the customer you wish to register as **Head Office**.
3. Choose the **Settings** tab.
4. Choose **Customer.**
5. Choose **Yes** in the **Head Office** drop-down list.

   The head office has now been registered.

How to link a customer to a Head office

1. Select **View - Contact - Contact management**.
2. Find the customer you wish to register as **Head Office**.
3. Click and mark the **Head office** you wish to attach the customer to from the list.
4. Click **OK**.
5. Answer **Yes** if you want the head office's terms of payment, delivery methods and order discounts to be available for this contact.
   Answer **No** if you want the regional office to have its own terms.

   The customer is now linked to the head office.

All customers defined as **Head office** or **Branch office** will have an icon like this in the contact card. By clicking on this icon, a list of the **Branch offices** attached to the **Head office** will appear. In **Main/branch office** you can mark a head or branch office and click the **Go to** button to be taken directly to that company's contact card.

Settings for Branch Office

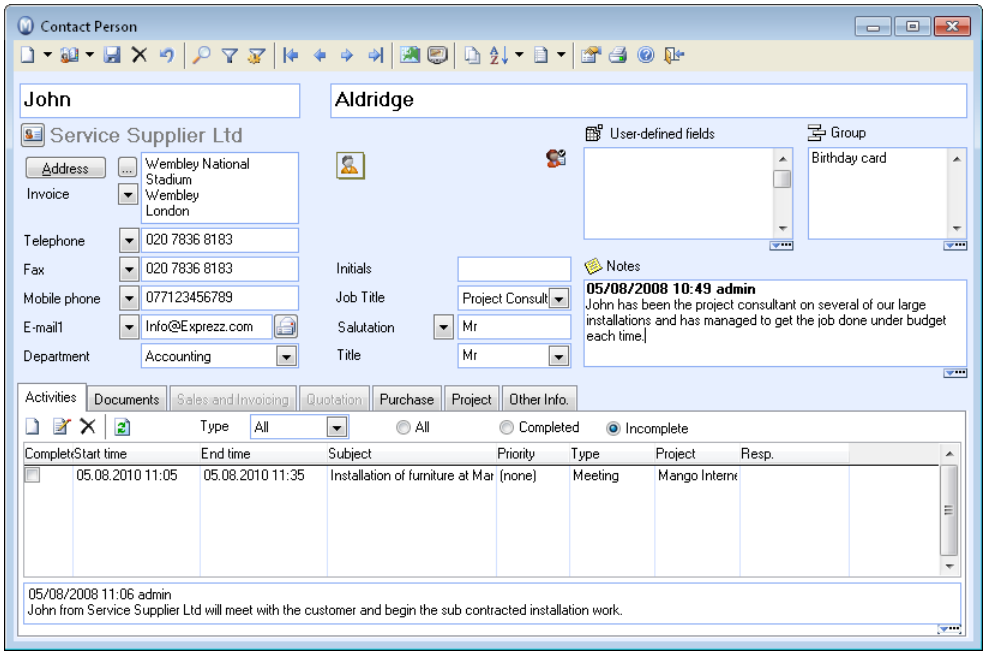
By going to the **Settings** tab and clicking on the **Customer** button, you can decide if the **Branch office** is to be invoiced to the Branch offices' invoice address or to the Head offices' invoicing address. Invoices will be sent to the contact or the **Head office** depending on who you have chosen to be invoiced. It is possible to override the invoicing address manually when creating a sales order, however, note that the **Ledger** entries will still be posted towards **Head office** if this is what you selected in previous settings.

Deliveries can be set to the contact's delivery address or the head office delivery address.

Note! Only mark the Head office contact as **Head office**, not the contact for the Branch office attached to the Head office.

Contact Persons

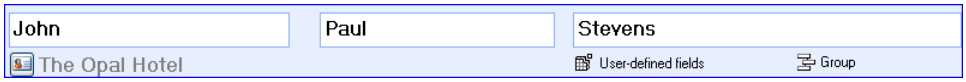
In the module for **Contact Person** you are able to register information regarding the contact persons whom you are in contact with at the customer/supplier. It will be easier for you to find the right person to talk to when they are registered.



The module for Contact Person can be opened as an independent module by selecting **View - Contacts** and **Contact Person**. It is also possible to open the module by double-clicking on a company contact linked to a Contact Person.

In the top half of the screen you register the Contact Person's first name, middle name and surname. If you have chosen for the contact's address to be inherited by the Contact Persons within the **User settings** for **Contact Person**, the address will already appear here. If you want to register a different address for the Contact Person, you can do so by typing directly into the address field or by clicking the **Address** button.

User Settings:



Tip! You can check the box **View column for middle names** in the **Contact Persons** tab.

The Contact Person's telephone number and the E-mail address can be typed directly into the fields for telephone, fax, mobile and e-mail.

You can also insert a picture of the Contact Person by using the **click to insert picture** icon. The picture can be in either JPG or BMP format.

Other useful information you can enter is **Initials**, **Job title**, **Title** and **Salutation**.

Tip! By using the Address Settings, you can define the set up of addresses, contacts' and contact persons' names and how they will be displayed on all reports. The settings can be found under **View - Settings - Report - Address Settings**.

The **User-defined Groups** and **Note** fields work the same way as in the Contact Person card.

By clicking on the arrow button to the right of the **Create activities** buttons you can create customised activities. You decide on the content for the activity yourself and which modules the activity template will be available in.

View Map: Click the icon if you want to view the location of the contact or contact person on a map. The map opens in a separate window and requires an Internet connection.

View Travel Route: Shows the travel route to the contact with your address as the point of departure. The feature requires an Internet connection.

Tip! Choose supplier of map and travel route services in the user settings for contact persons.

Click **Print** if you want to print some contact person specific reports, for example address labels. A new window will open where you can choose the report and further define the desired settings.

The Contact Person is linked to a main contact in the Contact register. Depending on the type (Customer or Supplier) of the main contact, different tabs will be available for the contact person. Tabs can also be made available in the User settings for contact persons. The tabs are identical to the tabs in the Contact register, except the Other info tab.

User Settings for Contact Person

By clicking the User settings icon in the toolbar you can adapt the screen to your needs. You can also choose **View** - **Settings** - **User** - **Settings per Module** and **Contact Person** to open this setting. The screen contains the tabs **Default Setup**, **Contact Persons** and **Tab**.

Default setup

You can select between three predefined settings:

Simple: Simplifies the screen as much as possible and shows only a few fields.

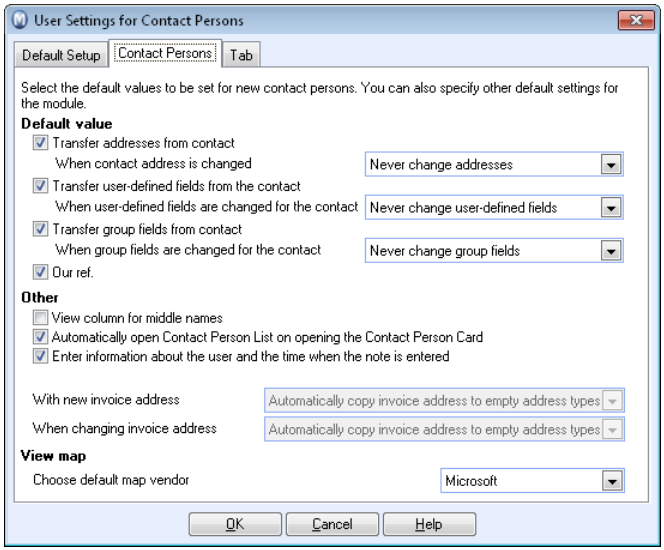
Normal: Shows the most common fields and makes standard default settings available.

Advanced: Shows all available fields and more functionality.

If you want to customise the screen you can do this under the **Tab** tab.

Contact Persons

Default value: This is where you decide what default values to apply for new contacts.



You can select whether you want the **Contact Person** to copy addresses from the contact as well as decide how a change of address will influence the **Contact Person**.

You can also choose whether you want to copy user defined field and groups from the contact. You can decide how changes in these fields are to influence the Contact person.

In addition you can mark whether or not you want **Our ref.** to copy automatically from the main contact.

Other: In other settings for this module you can select whether or not to show fields for **Middle name**, whether to automatically open the Contact register when opening the Contact card and adding information about the user when entering a note.

View map: Select which supplier you want to use for the map features **View map** and **View travel route** on the contact person card. You can find an equivalent setting in the user settings for contacts.

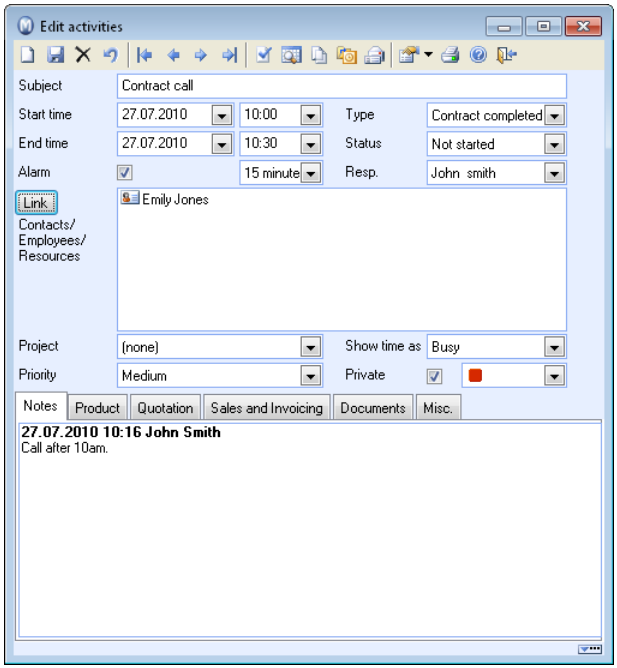
Tab

This is where you can select which tabs you want to show in the **Contact Person** screen. You do this by selecting the check boxes next to tabs you want to include. We recommend that you deselect the ones you don't use for a better screen overview.

Under **Other** you can select whether the totals in the **Quotation, Sales and Invoicing and Purchase tabs** shall be displayed including VAT.

E-Mail

The program contains functionality for sending e-mails to your contacts. For example, you can send a quotation, an order/invoice or a payment reminder to a contact via e-mail. Reports you compile in the program can also be sent via e-mail. By using the program functions to create and save e-mails to and if required, from your contacts you will be able to reap the full benefits of the customer care functionality in the program. E-mails are linked to contacts and you can easily find your communications with them again later.



Read the separate section below for more information on how to get started using e-mail.

System administrator: The e-mail settings are made at the individual user level.

The program sends e-mails from Outlook

You need to have Microsoft Outlook/Outlook Express installed to be able to send e-mails directly from the program. You can choose whether you want to use Mamut as the e-mail editor for creating and editing outgoing e-mail or whether you would prefer to use Outlook for this whenever possible.

Note! If you are planning on using the Outlook integration for more than just sending e-mails you cannot use Outlook Express. Find out more about Outlook integration below.

Create e-mails 'where you are'

The E-mail functionality is integrated with the majority of the system. For example, you can send a quotation, order confirmation or an invoice by e-mail directly from within the system. Or you can create a new e-mail directly from e.g. the Contact card, Project register or Employee register. You can also choose to print a report to e-mail, as well as send other documents.

Printing reports to e-mail (.pdf attachments)

You can choose to print to e-mail. For example, if you choose to print an invoice to e-mail, the program will automatically convert the printout to .pdf format and attach it to an e-mail to the recipient. Most recipients will be able to read .pdf attachments and it is generally regarded to be a safe file type.

Find out more about this in a separate section below.

Outlook integration

You can also choose to integrate the system with Outlook.

Outlook integration can be applied whether you use Outlook's e-mail editor for editing outgoing e-mails or the program's own. Among other things, the integration offers you the possibility to link incoming and outgoing e-mails to your contacts - automatically or manually. You can synchronise e-mails and the calendar and task list as well as being able to create new contacts directly from Outlook.

Note! To be able to activate this integration you need to have Microsoft Outlook installed on your computer. The integration is compatible with Outlook 2003 with SP1 and Outlook 2007. (It is not compatible with Outlook Express.)

The settings for Outlook integration are located under **View - Settings - User**. Select the **Settings per Module** tab and click on the **Outlook** icon.

Find out more about Outlook integration in a separate section below.

Group e-mail

You can use the wizard for selecting a group of contacts to send them a group e-mail. In the wizard you can set up and store fixed selections, which you can use later on. You can base your selection on a number of criteria so that you have access to perfectly matched contacts any time.

E-mail templates

With the help of the program's own e-mail editor, you are able to create e-mail templates. With these e-mail templates you can pre-enter components of the text and format it immediately instead of having to do so every time you send similar e-mails to your contacts. You can create as many templates as you require. Even if you have set the system to use Outlook as your e-mail editor in the user settings for Outlook, those registers that may benefit from the use of e-mail templates will still use the program's own e-mail editor.

Getting started with e-mail

How to get started using e-mail in the program

1. **Register your e-mail address**: First, you need to register an e-mail address in your user profile. You do so by going to **View - Settings - User**. Enter your e-mail address in the **E-mail** field.

   You can import your e-mail address from Outlook by clicking on the search button.

   System administrator: If you are the system administrator, you can register e-mail addresses for all users. You do so by going to **View - Settings - Security - User administration**.

2. **Select your e-mail editor**: You need to decide which e-mail editor you want to use for creating and editing e-mails from within the program. If you use Outlook as your e-mail editor Outlook will open when you want to write a new or edit an existing e-mail.

   Note! The settings only apply to e-mail from the Contact/Contact person, Employee and Activity register. E-mails that are created from the Product module use functions in the program's own e-mail editor and so will use this one regardless. E-mails created directly from reports will always use Outlook as their e-mail editor.
   You choose your e-mail editor under **View - Settings - User - Settings per User - Outlook** from the drop-down list up top.

3. **Decide whether you want to use Outlook integration or not**: If you are not going to make use of the integration with Outlook you are now ready to start sending e-mails from the program.

   If you are going to use Outlook integration you select this option under **View - Settings - User - Settings per Module - Outlook**. With the integration activated, you can specify details for how the integration should work. Find out more about the user settings for Outlook below.

   Now re-start Outlook. If you are using the integration you will see a menu bar for the program in Outlook.

   You can now start using the program to send e-mails to your contacts.

Outlook

If you have selected to use Outlook integration, all **New** elements in Outlook will automatically be synchronised with your Mamut system. Incoming e-mails, sent elements and elements in the calendar and the task lists that were received/registered before you activated the integration, will not be synchronised automatically. You can transfer these manually by marking an element in Outlook and clicking on **Transfer**.

The e-mail editor in the program

The program has its own e-mail editor for creating and editing outgoing e-mails, and is the default choice for writing e-mails.

Note! You can change the e-mail editor to the one in Outlook through the **User Settings for Outlook**.

For example, you can send e-mails directly from the contact card by clicking on **Send e-mail**. Alternatively, you can select **View- E-mail - Contact** to open the e-mail editor and then select which contact person the e-mail should be sent to. If you select to send the e-mail directly from the contact card, the e-mail address will be entered automatically.

How to edit an e-mail with the program's own e-mail editor:

1. Click on the **To..** button and select a recipient for the E-mail. You do this by selecting the contact to the left in the displayed window. You can then select one or more contact persons that will receive the E-mail. Transfer the contacts to the receiver window by using the arrows and click **OK**.
2. Click **Attachment** if you have a document you want to attach.
3. Enter a **Subject** for the contents of the E-mail.
4. Select a template from the **Select template** drop-down list if you want to base the contents on an e-mail template.
5. Select **Project** if the E-mail will be linked to a project.
6. Then enter the contents of the E-mail. By using standard formatting buttons located at the top of the editor, you can format the text in terms of font, colour and size etc.
7. Click **Send E-mail** to send the e-mail.

   The e-mail is now sent via Outlook.

You can find out more about the various alternatives for setting up an e-mail from the program under 'About E-mail in the program'.

Creating an e-mail campaign

You can send personalised e-mail messages to your contacts by using merge fields in Microsoft Word. The e-mails contain the same information except for the contact information linked into the merge fields, making the message more personal. The contact information is retrieved from Mamut Business Software. You can select the recipients of the e-mail via the wizard. By using the merge field feature, you can send the e-mail as a separate message to each recipient and not as a group e-mail or by hiding the recipients by using a blind carbon copy.

Before launching the wizard, you must create the document template which will contain the text and graphics of the e-mail, for instance, the message text and your company's logo.

How to create an e-mail campaign:

1. Click **View - E-mail - Contact Selection**.
2. Choose whether you wish to use a simple or an advanced filter when defining a selection of recipients. Click **Next**.
3. Set up the filter and click **Next**.
   Read more about contact selections in the introduction manual "Settings, Reports and Filters".
4. Select **Create an advanced mass mail via Word for defined selection** in order to use the merged document.
   Click **Next**.
5. Click **Complete**.
6. Enter a document heading. The heading will be used as the subject line in the e-mail. Enter additional information by using the drop-down lists.
7. Select the appropriate template from the drop-down list **Doc. Template**.
8. Click the **Create/merge** button in order to create the document.
9. The document opens with focus on the **Mailings** tab.
   Note! If you click **OK** in the window **Merge to e-mails**, the e-mail will be sent immediately. Click **Cancel** to edit or display the document before sending it.
10. You can now display the document with the correct contact information. To the right of the window, you will find a mail merge wizard. In step five of the wizard (step five is automatically opened), you can use the arrow buttons to display the document containing all contacts' information in the merge fields.
11. Click **Finish and Merge - Send E-mail** on the tool bar.
12. Click **OK** in order to send the e-mails.

The personalised e-mails will now be sent to your contacts.

Note! You can use the document template **Mass Mailing.dot** in step 7 as a point of departure for you own, personalised mass mailing. Please note that this template may be overwritten at the nest program update. You should therefore save you template with a different file name.

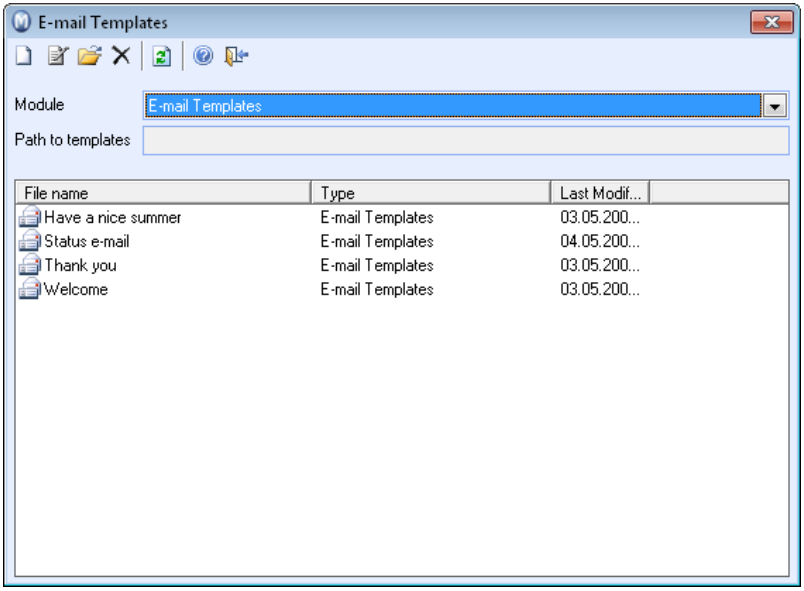
E-mail Templates

If you have recurring e-mails for several of your contacts, you can save time by creating an e-mail template. The text is formatted only once instead of every time a similar e-mail is

sent to another contact. You can create as many templates as you want, as well as editing the standardised templates that come with the program.

How to create a new e-mail template:

1. Go to **View - E-mail** and **E-mail templates**.



2. Click **New**.
3. Enter a **Template name** and **Subject**.
   If you want to attach a file, click **Attachment** and add the file.
4. Enter your text.
5. Format the text for desired font and colour.
6. Click **Save**.

   The template is now available for selection in the Select template drop-down list in the program's own e-mail editor.

You can always edit the e-mail template later. You are also able to edit e-mail templates that come with the program as pre-defined options.

Printing to e-mail attachment

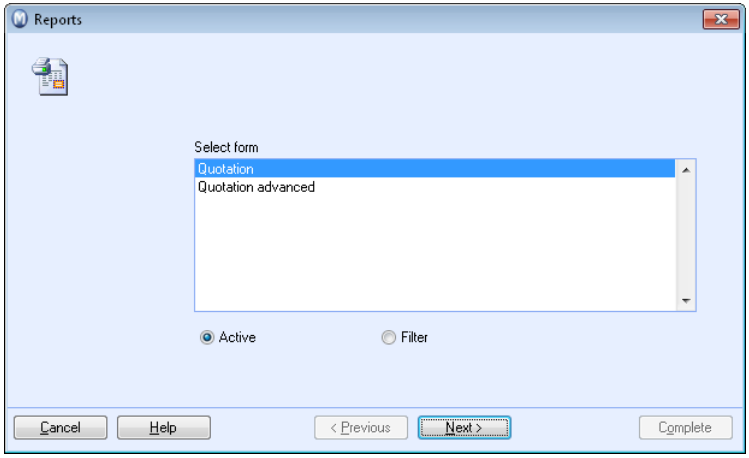
You can choose to print to e-mail. For example, if you choose to print an invoice to e-mail, the program will automatically convert the printout to .pdf format and insert to an e-mail to

the recipient as an attachment. Most recipients will be able to read .pdf attachments and it is generally regarded to be a safe file type.

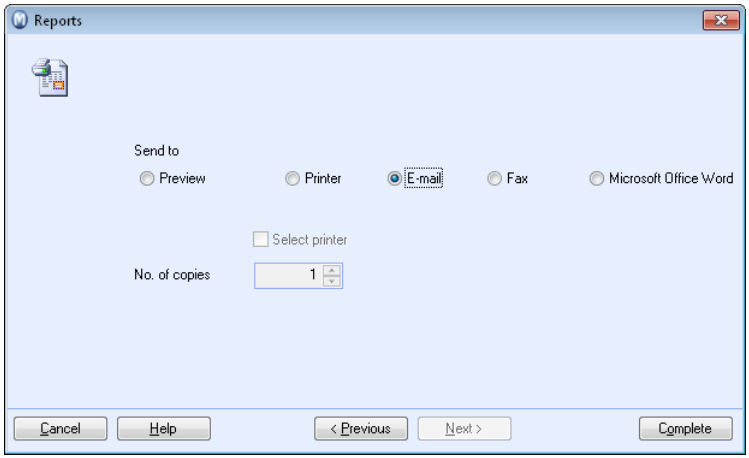
In the example below you are printing a quotation.

How to print a quotation to e-mail

1. Create a new quotation or open an existing one.
2. Click **Print** (Ctrl + P).



3. Select **Quotation** and click **Next**.



4. Select **E-mail** and click on **Complete**.
   An e-mail will now be created with the quotation document attached as a .pdf file. Check that the recipient's e-mail address is correct. You may also want to double-click on the document (Quotation.pdf attachment) to check the document quality before you send the e-mail.

5. Click **Send** in MS Outlook to send the e-mail.

   The e-mail is now sent from MS Outlook with the quotation attached.

> **Note!** The system treats the quotation as a report. All reports use MD Outlook as their e-mail editor even if you have selected the program's own e-mail editor in the user settings for Outlook. Find out more about this topic under 'Getting started with e-mail'.

Sending Documents by e-mail

Documents linked to one or more contacts can be sent to the contact(s) via e-mail. To be able to send a document by e-mail, an e-mail address has to be registered on the contact card for that contact, and the document must be created or imported.

You can send documents by e-mail from the document list and via the **Document** tab in all modules where it is available.

> **Note!** It is not possible to send employees documents by e-mail. You need to have Microsoft Office 2000 or a more recent version installed to allow documents to be sent by e-mail.

How to send a document by e-mail

1. Select the document you want to send by e-mail
2. Click **Send e-mail** (or right-click on the document and select **Send e-mail**).
3. An e-mail will be generated and opened in the e-mail client you selected in the user settings. The recipient field is completed automatically and the document is attached as a file.
4. Fill in any additional details you may have.
5. Click **Send**.

   The document has now been sent via e-mail.

Outlook Integration

The program sends e-mails from Outlook. Additionally, you can select to integrate the system with Outlook so that incoming e-mails in Outlook will be transferred to the program as an activity or so meetings from the Outlook calendar will be transferred to the calendar in your Mamut Business Software, for example. You can use the integration whether you are using Outlook as your e-mail editor for outgoing e-mails or the program's own e-mail editor. To activate the integration you need to go to **View - Settings - User**. Select the **Settings per Module** tab and click on the **Outlook** icon. E-mails received in Outlook can be set to create an activity for the involved contact within the program automatically. This can only occur if the program can locate the sender's e-mail address in one of your contact cards, or you can create such an activity manually. You can also synchronise the task list and the calendar - in both these ways.

In help (F1), you can find more information about integration with Microsoft Outlook.

Activities and Calendars

Activities

Activities allow you to gain full control over both your own and your employee's activities related to customers and projects. You can plan meetings, customer visits, follow-up activities, telephone calls, and keep track of these activities via the calendar, the common calendar, the task list, as well as directly within the contact card, or in the case of a project, within the project register.

Display activities in the calendar or the task list

Activities can be displayed and edited in the task list. In addition, the calendar shows activities that you are responsible for or linked to as an employee. You can choose whether an activity should be shown in the calendar or in the task list to the right. Where it is displayed is dependent on the activity's **Activity type**. Activities of the type Demonstration and Meeting are displayed in the calendar while activities such as Letter, Fax and Telephone show in the task list.

Read more about activities in the calendar in the "Calendar" section below.

Linking a contact

When you create an activity you can use the **Link** button to link a Contact, Employee and Resource so that later you or other users can get access to the information you registered for the activity.

Creating group activities

A group activity is directed at more than one contact. With the creation of a group activity function you define a selection of contacts that will be involved and then set the parameters that will apply for the activity.

Handling several activities with the help of a wizard

With the help of the **Change values for a selection of activities** you define which activities should be edited by making the appropriate selection.

Distributing activities

You can distribute activities between different customer service agents at random when you create several group activities or when changing the values for a selection of activities.

Make use of follow-up activities to keep track of customers and other processes

In the Contact, Sales and Invoicing, Purchase, Logistics and Accounting modules there are a number of processes that can be set up to automatically trigger the creation of a follow-up activity.

Simplify program usage with the help of activity templates

Through easily accessible activity templates in the various modules you can simplify the process of creating a new activity considerably. You can define and customise which activities should be created fast and simply from each of the modules.

Integrating activities with Outlook

Activities from the calendar and task list in Outlook can be transferred to the calendar and task list within the program. Reversely, activities you create in the program can be transferred automatically to the calendar and task list in Outlook.

Using Skype for phone calls and getting calls logged as activities for your contacts

With Skype you can ring contacts from their contact or contact person card. You can also receive Skype phone calls. If the contact is registered with a **Skype name** or **Skype number** in your contact or contact person register, the contact's entry will open. Calls with existing contacts are logged as activities so that you can easily access the contact's call history later.

System-created activities

System-created activities are activities that are created automatically when certain events and processes take place in the program. Examples of events triggering the creation of activities by the system are e.g. changing the company settings, stock counts, various wizards that change the values for a selection of contacts, products etc., Period End, changes to the accounting year, journal number series, creation of new accounts in the Chart of Accounts and more. Read more about this in the introduction book "Settings, Reports and Filters".

Analysing activities (Add-on product)

You can retrieve a list of all activities and enter them directly into a Pivot table.

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 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.

Note! 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.

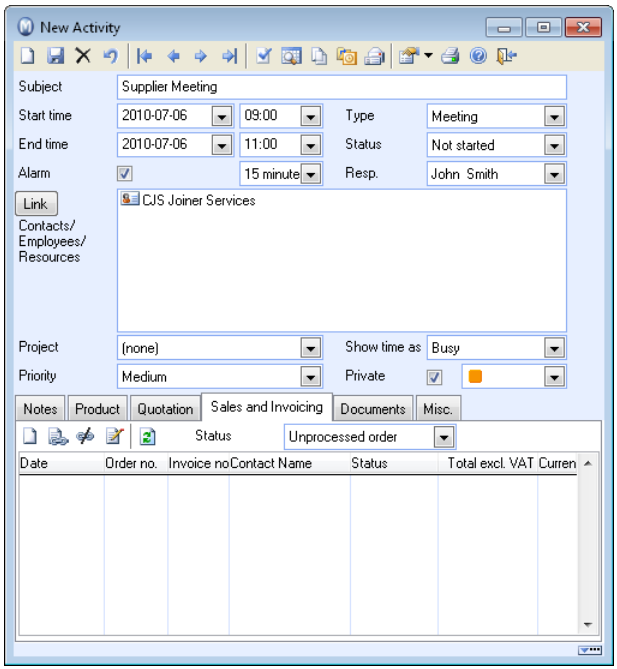
In help (F1), you can find more information about the activity window.

Working with Activities

Creating New Activities

Within your daily work you are most likely to create new activities related to different registers directly from within the relevant register. Activities can be created from the Activity register, Contact register, Company contact register and Project register or by going to the menu selection **View - Activity - New Activity**.

The fields in the activity are not mandatory. A number of fields are already pre-entered. Which these are depends on where in the program you have created the activity from.



You can set default entries for the creation of new activities in the User Settings.

Tip! The program usually displays an interval for the **From** and **To** date when the activity is displayed in the Activity List. If you cannot find an activity in the list this could be because the date is outside the interval.

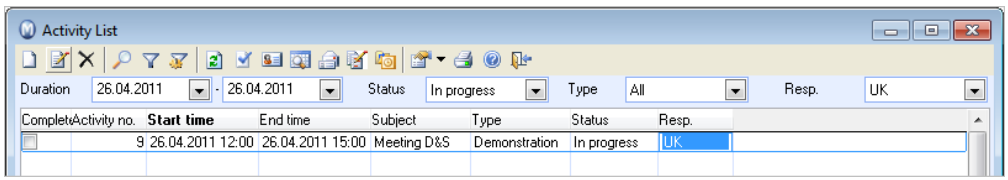
The Activity List

The activity list under **View - Activity - Activity List** provides you with an overview of all activities that are created in the program.

> **Tip!** Through various add-on products you may also have separate activity lists for Customer service, Telemarketing and Product service.

You can create and edit new and existing activities from this window. When you register a new activity you are able to enter contact information and link the activity to a project. From the activity register you have the opportunity to delay an activity or mark it as **Complete**. In the top of the window you can find several filters which limit the activities that are displayed.

> **Tip!** If you create an activity from the **Activity** tab in the **Contact register**, the contact information will automatically be filled out. If you create an activity from the **Activity** tab in the **Project Register**, the project information will automatically be filled out.



Changes in the filters are not shown until you click **Update** or use the function key [F5].

Complete! You can set an activity to complete by selecting it from the list and clicking on the **Complete** button.

Filters in the activity list

Duration: Set the **from date** and the **to date** to show the activities which are allocated for the period. If you cannot find an activity in the list this could be due to the activities' date being outside the preset time interval.
The entries under **Duration** are determined by your user settings for activity under **View - Settings - User - Settings per Module - Activity**, tab **Activity List**, field **Predefined date range for the activity list**.

Status: Select which status the activities you wish to display should belong to. You can also select **All** which will deactivate the filter. By choosing **Incomplete** and then clicking the **Update** icon, all incomplete activities will be shown.

Type: Select which activity type the activities you wish to display should belong to. The filter can also be deactivated by selecting **All**, or you can select **(None)**.

Activity lists for Customer Services, Telemarketing and Product Services only show specified activity types. This is controlled through the activity type settings.

Resp.: Select who is to be responsible for the activities shown in the window. The filter can also be deactivated by selecting **All**, or you can select **(None)**. The latter will only show activities that have not been allocated to a specific person.

> You can also create a **Filter** for the activities in the toolbar. This will override the filters described above, and deactivate them.

Delaying activities! You can delay several activities by clicking on the button Change values for a selection of activities. The **Change values for a selection of activities** wizard will start. Note that this function is only relevant if you want to edit several activities. If you are only editing the time for one activity, select the activity instead and click the **Edit** button.

Open the related element in MS Outlook: This icon only shows if you have chosen to make use of the Outlook integration.

To efficiently manage several activities simultaneously, we recommend that you use the tools **Group Activities** and Change values for a selection of activities.

User Settings and **Company Settings**: The user settings allow you to define the content of the windows for activity management as well as the default values for new activities. Use the arrow button in order to open the company settings.

Linking Activities to Contacts/Employees/Resources

As you create an activity you can click the **Link** button to link the activity to Contacts, Employees and Resources in order for you or other users to access the information you register to the activity at a later stage.

Contacts: Choose contacts from a list of Contact people or from the list of all registered Contact people. You can include as many contacts as you wish, however if the activity cannot be executed as one, we recommend you create an independent activity through the wizard for Group Activity.

Employees: Employees involved in the activity and the employee in charge of the activity is listed here. All employees registered in the Employee register can be chosen.

Resources: Meeting rooms, projectors, demonstration models etc. can be registered in the Product register with a name of up to 50 characters. These will then be available for booking for the activity's duration.

How to link Contacts, Employees and Resources to an activity

1. Click **View** - **Activity** - **New activity** or select an existing activity from the activity list by clicking **View** - **Activity** - **Activity List**.
2.

Click the **Link** button.
3. Select **Contacts** in the **Show selection from** drop-down list.
4. Click on the contact you wish to include in the appointment. If you fail to find the contact in the menu, type the first letter of the name into the **Quick Search** field.
5. If the appointment involves a particular person as the contact, select the person from the **Contact Persons** drop-down list.
   If you choose a contact person through the **Show selection from** drop-down list, you can add contact persons directly.
   The linked Contact will now automatically be included in the appointment.
6. Transfer the Contact and the Contact person to Contacts on the left by using the arrows. You can double click the mouse directly on a contact or contact person to move them.
7. Select **Employee** or **Resource** in the **Show selection from** field and repeat the process.
8. Click **Check availability**. If an employee or a resource is unavailable for the time of the appointment, this will be shown as blue lines in the overview.
9. Click **OK**.

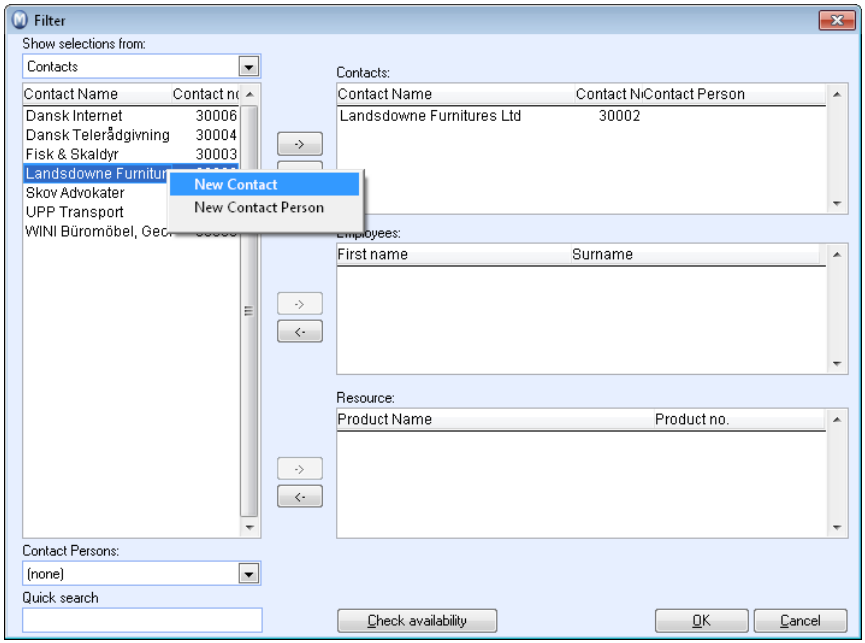
   All Contacts, Employees and Resources will now be linked to the activity.

Creating contacts and contact persons in the activity card

Via the activity list you are able create new contacts and contact persons directly in the activity card. This allows you to create contacts and contact persons without having to leave the activity card and navigate to the contact module to create them.

How to create contacts and contact persons through the activity card

1. Click **View - Activity - Activity List** and double click the relevant activity in the list or click **New** in the toolbar to create a new activity.
2. Then click **Link** in the **New Activity** window. In the upper drop-down list in the **Filter** window, ensure that you have selected **Contacts**.
3. Right click a contact in the list of contacts below and select **New contact**
   -- or --
   New contact person.



4. Enter the relevant information in the available fields and click **OK**.

You have now created a contact or a contact person in the activity card.

Schedule

At activity level, you can click on the **Check availability** button to open a schedule for the employees and/or resources linked to the activity.

If the employee or resource has been reserved by another activity, that time will be displayed as a blue bar within the overview. You are always able to click directly into the calendar to adjust the start and end times for the activity in order to select a time that suits all involved employees and resources.

Changing Values for a Selection of Activities

You use a wizard to define which activities are to be changed by means of a selection. You can then select one or more parameters to be changed, and set new values for these fields. This may prove useful if you are to reallocate responsibility for the activities of a customer service agent who no longer works for the company, postpone a project etc.

Launch the wizard from **View - Activities - Change values for a selection of activities**.

Tip! In help (F1), you can find more information about the wizard for changing values for a selection of activities.

Distributing Activities

You can distribute activities randomly among several customer service agents by creating group activities or you can change the values for several activities.

By clicking **Distribute responsibility** in one of the wizards, you will view a list of everyone defined as customer service agents in the **Employee register**.

How to distribute activities

1. Select **View - Activity - Create Group Activities** or **View - Activity - Change Values for a Selection of Activities**.
2. Create your filter and complete the first steps of the wizard. Then click the **Distribute resp.** button.
3. Select which customer service agents are to be included in the distribution of activities.
4. Indicate how many activities are to be allocated to that person. At the bottom of the window there is a running total of how many of the activities have been distributed.
5. Click **OK** when the activities are distributed.

   You can now complete the wizard.

Duplicating/Copying Activities

You can set an activity to occur one or more times by using the function for duplicating activities. For example, you can repeat an activity every fourth Monday. The advantage with using the duplication function for this is that you do not need to fill in information such as activity type, the individual responsible, contact and contact person more than once.

This advanced duplication means that you can manage your contacts on a regular basis, without having to record each activity manually.

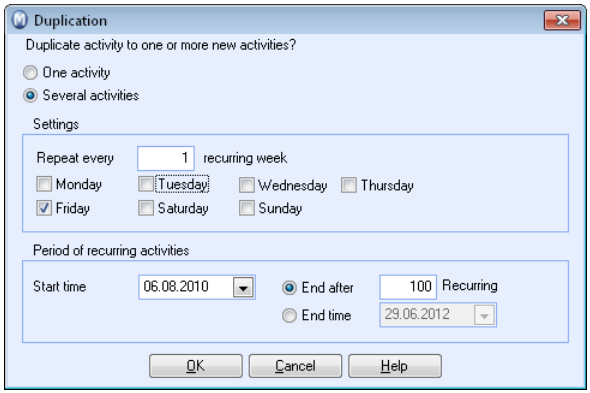
Tip! There are two alternative ways in which to define the end time: The activity can be repeated a specific number of times or you can define a specific end time yourself. You can repeat an activity up to one hundred times, you can either select date or number of times.

How to duplicate an activity

1. Go to **View - Activity - Activity List**, select an existing activity and click **Edit**.

   or

   Go to **View - Activity** and click on **New Activity**.
2. Set up the activity and when you are done click **Duplicate**. Answer **Yes** when asked whether you would like to save changes. You can also duplicate an existing activity by opening it and clicking on **Duplicate activity**.



3. Select whether you wish to duplicate the activity one or several times. If you select **Several activities**, the fields below become active: In **Repeat every X recurring week**, you enter how many weeks the activity should recur, e.g. enter ’r;4’ if you want the activity to be repeated every four weeks. Select one or several weekdays to determine which days of the week the activity should be repeated. Also decide on the date when the activity should start and a date for when it will end. Instead of an end date, you can also select how many times in total the activity is to be repeated before it ends.
4. Click **OK**.

A maximum of 100 activities will be created. The activities can be found in the activity list.

Tip! If you would prefer not to make use of the duplication wizard, you can select **Duplicate: Always to one new activity**' in the User settings. This way only one new activity, instead of multiple new activities, will be created when you click **Duplicate**.

Creating Group Activities

A group activity is directed at more than one contact. The Create group activity function allows you to define a selection of contacts at which the activity is to be directed and other parameters which apply to the activity. You also choose whether to create only one activity that includes all the contacts, or create several activities, one for each contact.

You start the wizard for creating group activities using the **View** menu where you select **Activities** and **Create group activities**.

Tip! In help (F1), you can find more information about the wizard for creating group activities.

Activity Settings

User Settings for Activity

The User Settings allow you to specify how you want to work with activities, e.g. how the windows for activity management look or which default values you want present when creating a new activity.

The user settings are accessed by clicking the **User Settings** button on the toolbar. You can also go to **View - Settings - User - Settings per Module - Activity**.

Default setup

You can choose from three predefined setups:

- **Basic**: Keeps the screen as clear as possible, showing only some of the fields.
- **Normal**: Shows standard fields and functionality.
- **Advanced**: Shows all available fields and more functionality.

Click the relevant button to choose one of the predefined setups.

Activity list

This is where you select which field from each activity is to appear in the activity list. Note that too many columns will make the list somewhat difficult to read, and will also affect the speed of the module. If you click on one of the buttons in the **Default setup** tab the content here will change accordingly.

Predefined date range for the activity list: Each time you open the activity list, the date range you have selected from this list will be displayed as defined under **Duration**.

Activity card

This is where you can set the guidelines for how an activity is to be created.

Default value: Each field for which you enter values will be automatically completed when a new activity is created. If you mostly create activities of the type 'Sales call (outgoing)' you will save yourself time if the field has already been completed.

Tabs: This is where you can select which tabs show when creating activities. For example, for a user who only works with Product services, it may be relevant to show the Product tab only.

Other: Default sizes for note fields can be set here. It is possible to override size manually in each activity. You can also choose whether to automatically fill in information about the user and the time when a note is entered. In addition you can select whether or not you wish to show details about your activities in other peoples calendars and you can automatically link a default Contact person/-or project to an activity when creating it from the contact card. If you want a simpler way of duplicating activities you can select to

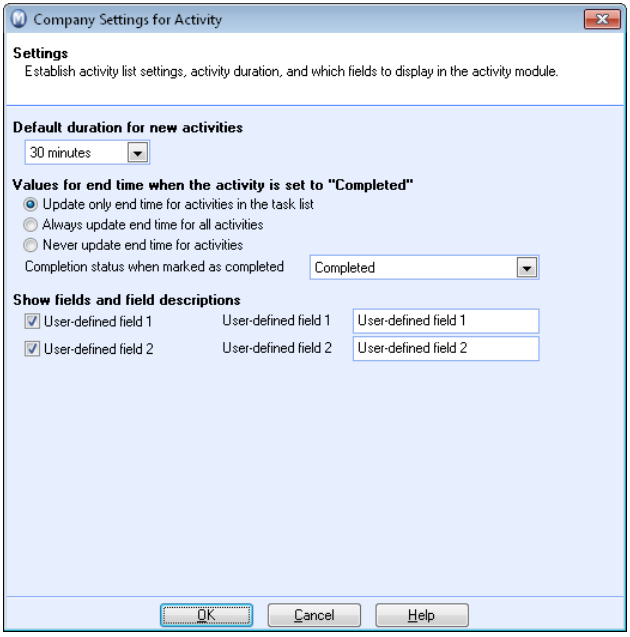
Duplicate: always to one new activity, this way you will be able to duplicate without having to use the wizard.

The system closes the activity you duplicate from automatically. If you would like it to remain open you can remove the tick next to **Duplicate**: **Close the activity being duplicated.**

Company Settings for Activity

Here you will find most of the settings for the activity module, in addition to the controls that you can set for each activity type.

Click the arrow button next to the **User Settings** button on the toolbar in order to access the company settings for activities. You can also go to **View - Settings - Company - Settings per Module - Activity**.



Standard duration of new activities

When creating an activity the end time is always adjusted in line with the start time. You can select how long a standard activity will last and you can change the length for each activity by adjusting the end time.

Values for the end date when an activity is set as 'Completed'

Activities can be set as completed in all modules containing lists of activities. Here, you can choose whether to change the end time or keep the time scheduled when the activity was created.

Update only end date for activities in the task list: This is the most obvious choice, as the activities in the task list are not necessarily set to a specific time. Activities displayed in the calendar will then retain their end time even if they are marked as completed, for example the day after.

Always update end time for all activities: This means that the activities in the calendar (meetings, demonstrations etc.) must also be marked as completed, for example immediately after a meeting is over.

Never update end time for activities: The end time which is set when the activity was created will not be changed when it is marked as completed.

Completion status when marked as complete: When an activity is marked as completed, the Activity status changes. You can choose the status here. You can only select activity status options which have the property Completed, set in the **Properties Register**.

Show fields and field descriptions

If you need additional classifications or more information fields for the activities, you can activate two (2) user-defined fields. The fields can be activated and made available in the Miscellaneous tab for each activity, if you tick the box in front of the field and give a descriptive name for the field.

The fields can be used later when you set selections for activities in the activity list or when printing reports.

User-defined field 1: This field requires you to also create fixed categories through the **Properties Register**.
Please note that the new name will not be available in the Properties register until you have closed and restarted the program. Until then, it will be called User-defined field 1.

User-defined field 2: The field can only be used to enter free-format text.

Available activity lists and types

The separate activity lists for Customer Services, Product Services and Telemarketing make it easier to work with specific activity types. You can for example set up user accesses that will only allow access to certain activity types.

The functionality is available as add-on products.

Activity Types

The **Activity type** that is assigned to every single activity controls among other things, where the activity will be shown - in the calendar or the task list. The system is set up with a number of pre-defined activity types.

The calendar shows the activities assigned to you or to which you are linked as an employee. You can choose whether an activity will show in the actual calendar or in the task list. Activity types Registered, Demonstration and Meeting are shown in the calendar, whereas activities such as Letter, Fax and Tel. out are shown in the task list. Whether an activity shows in the task list however, can always be decided on an activity-to-activity basis.

Activities can be set up with an alarm function that allows you to decide how long before an activity's start time you will be alerted.

Activity types can also be used to control how activities are shown in the calendar: Busy, Free or Out. This is particularly useful information in connection with linking employees to other activities.

You can decide that all activities of a certain type require a **Resp.**, and you can also choose to make an activity type **Inactive** so that it cannot be selected from the drop-down list any longer.

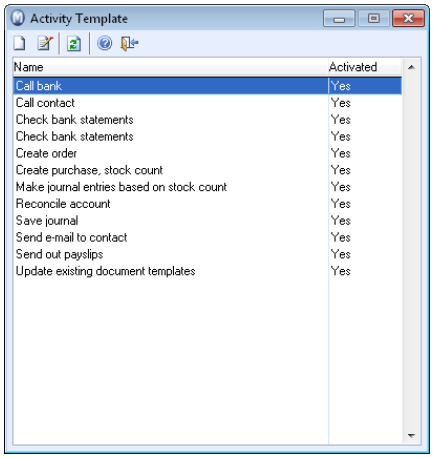
You can edit activity types by right-clicking them in the activity type field and picking **Change in properties register**, or by going to **View - Settings - Company - Properties Register**.

Tip! In the User Settings for Activity you can enter default values for new activities you create, e.g. which activity type a new activity should be assigned to.

In help (F1), you can find more information about the settings for activity types.

Activity Templates

With the help of easily accessible activity templates in the various modules you can noticeably simplify the creation of activities. You can define and customise which activities you want to be able to set up fast and easy from each module.



In modules from which you can create activities directly, the **Create activities** button will become available in the toolbar. Next to this you will find a small arrow button. Clicking it will open a list of activities available for creation from the module you are in.

You decide which activities should be available for creation from the various modules. By clicking on **New** in the **Activity template** window you can create new activity templates. If you would like to edit an existing activity template, simply click on **Edit**.

You can enter default values for each activity template, which will be suggested automatically when creating an activity based on the template. Please note that default values for follow-up tasks will override the activity user settings you make.

Editing Activity Templates

In the editing window for **Activity templates** you can decide which modules the active template is to be available in with the help of the arrow buttons.

In the **Name** field you enter a description of the type of activity to be created by using the template. This is the name that will show when you click on the arrow button to the right of **Create activities** in the modules the activity template is available in.

Under the **Default values for new activities** heading you can enter the **Subject** and **Start time** for the activity, **Priority**, **Type**, **Status** and who will be responsible for carrying out the activity. In the **Note** field you can register additional information if you would like to elaborate on the activity's aim and purpose. The values you register will be suggested automatically when creating an activity based on the template, however, you can overwrite them if needed.

Creating Follow-up Tasks

There are a number of processes in the Contact, Sales, Purchase, Logistics and Accounting modules that can be activated and that will then automatically generate follow-up tasks. You decide yourself, which processes you would like to prompt follow-up task generations. The overview of which follow-up tasks you are able to activate can be found by going to **View - Activity - Follow-up tasks**.

Throughout the program you will encounter question boxes once you have performed a follow-up task prompting process, asking you whether you would like to create a follow-up task. If you would rather not have this box pop up, you can tick the **Do not show this message again** box. The setting is also adjustable when editing follow-up tasks.

Deciding which processes should trigger the generation of a follow-up task in your company requires some serious thought. Think about which functions you regularly use in the program and how far they require follow-up. Activating too many follow-up tasks can easily lead to your activity list becoming crowded and difficult to navigate rather than it being helpful.

One example for when a follow-up activity may be helpful is the **Invoicing** process. You would set the follow-up tasks to commence on the invoice's due date, or another convenient start date. The task could remind you to check for example, whether payment for the invoice has been received.

By highlighting a process and clicking on **Edit** you can activate or de-activate follow-up tasks. You can also enter default values for new tasks that are to be created automatically. If you select **Do not show this message again** you will not receive messages asking you whether you would like to create a follow-up task for this process.

In the **Follow-up task** window for each process you can edit the **Start time** of when a task should commence, the **Priority, Type, Status** and who should be **Responsible**. In the **Note** field you can register more detailed information and if you like, you can choose to **Open activity upon creation**. This will give the opportunity to register more information about every task directly upon creating them.

Note! The settings for how and when follow-up tasks will be created apply per company database. Please also note that the default values for a follow-up task will override the activity user settings.

Calendar

The calendar shows the activities you are responsible for, or linked to, as an employee.

Open the calendar

By going to **View - Activity - Calendar**.

The button on the desktop toolbar.

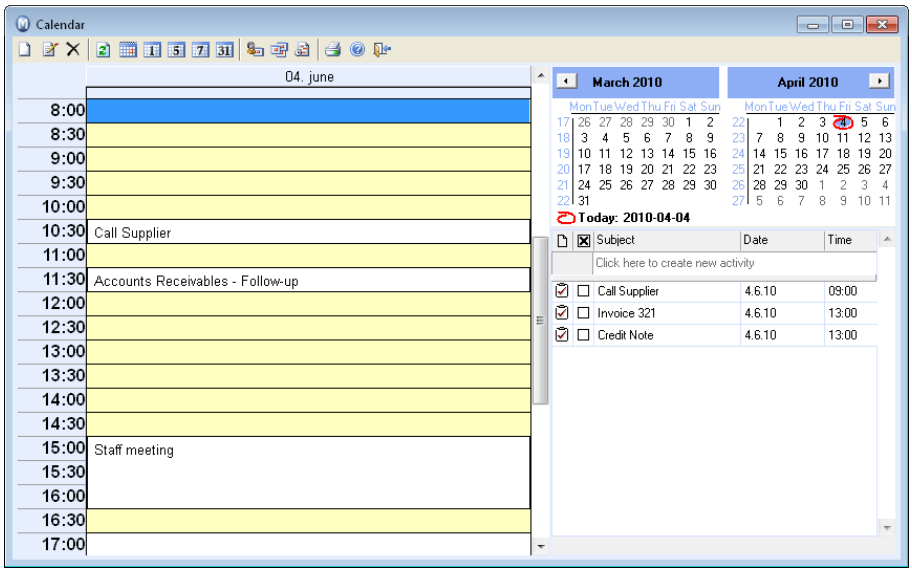
The button in the activity list.

Activities are shown in the calendar display or the task list

You can choose whether an activity is displayed to the left in the actual calendar or the task list to the right. This is controlled by the activity types for the different activities. Activities types Registered, Demonstration and Meeting are shown in the calendar, whereas activities such as Letter, Fax and Tel. out are shown in the task list.

You can edit the activity types by right-clicking the activity type field within the activity card and selecting **Change in properties register**. You can also click **View - Settings - Company - Properties Register**. If you select **Transfer the activity to the task list**, the activity will only be displayed in the task list. If you deselect this option, the activity will automatically be displayed in the calendar. Any changes you make here will not affect existing activities, only new ones.

Read more about editing activity types in the section "Settings for Activity Types".



The activity placement can also be overridden for each activity in the **Miscellaneous** tab, where you can select or deselect **Show activity in the Task list**.

Employee/Resource Calendar

You can view the calendar for an employee or a resource in the regular calendar.

The Common Calendar

The common calendar allows you to see the calendars for several employees or resources at the same time.

Mini-Calendar

You can choose to display a miniature calendar when you open the company database.

Calendar display

Calendar display allows you to see both activities you are responsible for, and those you are linked to as an employee. You can choose whether to display 1 day, 5 days (working week), 7 days (calendar week) or 31 days (month).

You can create new activities directly in the calendar by double clicking on a free area. In the same way, you can directly open existing activities by double-clicking on them.

You can navigate forwards and backwards in time by clicking on the overview calendar in the top right.

Colour coded activities in the calendar

You can associate an activity that is going to be displayed in the calendar with a colour. You can define a default colour for each activity type in the settings for activity types. This way, you will not be required to define a colour for each individual activity.

Task list

The Task list only shows activities for which you are responsible. Completed tasks can be marked as completed by placing a tick in the box to the left of the task.

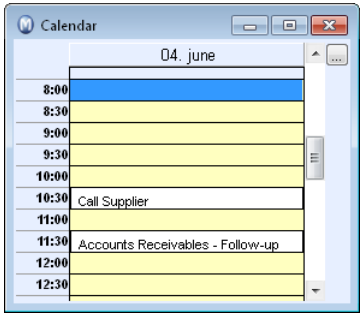
New tasks are created by entering the subject in the field marked 'Click here to create a new activity'. Previously created tasks are opened by double-clicking on them, the same as in the calendar.

Integrating Activities with Outlook

Activities in the task list and calendar can be transferred to the program calendar or task list. The activities you create in the program can be transferred automatically to the calendar and task list in Outlook.

Mini-calendar

The small calendar provides a list of the day's activities for which you are responsible, or linked to as an employee.



You can also navigate to another date by using the button to the right of the calendar.

Tip! You can customise the system so that the mini-calendar is opened automatically when you open the company database. The setting can be found in the user settings, in the **Other** tab.

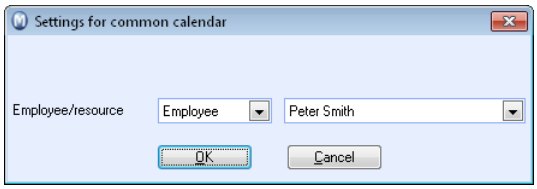
Employee/Resource Calendar

You can display the schedule for one employee or resource in the standard calendar. This can make it easier to get an overview of your company's employees and resources and you can, for example, follow up on the activity level for other employees and resources. You can also make use of this function if you want to create or change activities for other employees or resources.

Tip! You can decide whether or not your own activities will show in the standard calendar of your employees. Activate the function in the user settings for activities. You can also choose to define an activity as **Private**. The details will then only be available for users with the proper access rights.

View other Employee/Resource calendar

1. Select **View - Activity - Calendar** and **Employee/Resource calendar**.
2. Select whether or not you want to view an employee or a resource.



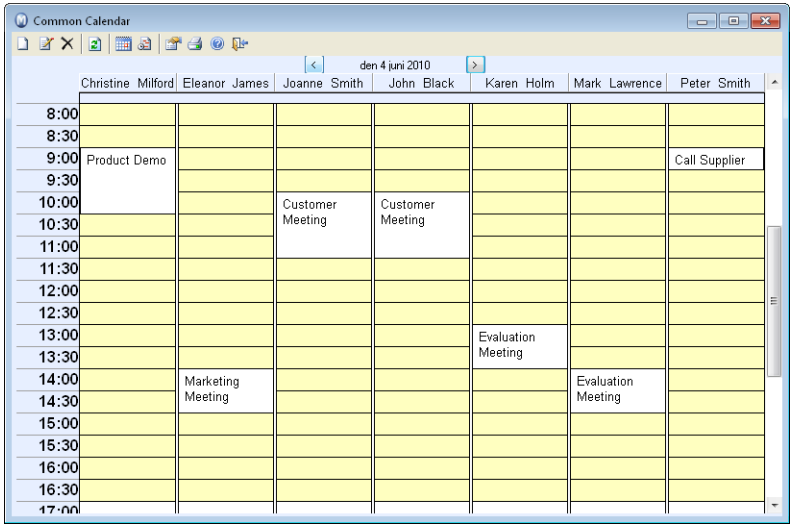
3. Select the specific Employee or Resource.
4. Click **OK**.

The calendar for the chosen Employee/Resource will be shown and you can create new or edit existing activities.

Common Calendar

In the common calendar, you can view up to seven calendars for employees and/or resources at the same time.

Choose the employees and/or resources to be shown using the **Settings for common calendar** button in the toolbar. In each column you first have to choose between employee and resource. You then select a specific employee or resource. The common calendar opens automatically for the current date. If you wish to view the calendar for a different date, click **Select date** in the toolbar.



Please note that the common calendar does not show which activities each individual person has in the task list.

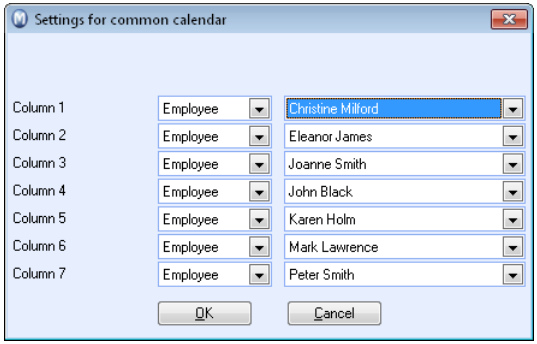
An employee is not the same as a user of the program. If you want to be able to see the activities of a user, you must first set up the user as an employee in the Employee register. A resource can be premises or a meeting room, for example. To set up a resource, create a new product in the product register and select **Resource** in the **Settings** tab.

You can create a new activity by double-clicking in one of the columns in the common calendar. The employee at the top of the column you select is set as responsible for the activity. You can also open an existing activity by double-clicking on it.

You can adapt the common calendar to your company's specific needs with regard to resources. For example, you can use it to set up a meeting with several employees. You can also see whether the meeting room is available and book it.

To set up a person/resource in the common calendar

1. Select **View - Activity** and click on **Common calendar**.
2. Click on **Select date** and enter the date you wish to display.
3. Click **Settings** for common calendar. In the field to the right, select the calendar for a specific employee or resource by choosing the appropriate item from the drop-down menu. In the field to the right, select the calendar for a specific employee or resource.

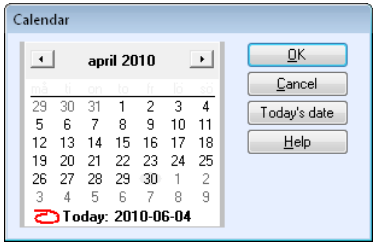


4. Click **OK**.

The calendars of the selected employees or resources are displayed, and you can then create new activities or edit existing ones.

Calendar - Select Date

In a number of date fields, you can click the symbol to the right of the field in order to select date from the calendar.



Insert the date by double clicking the date, or highlight the date and click **OK**.

Today's date: Automatically highlights today's date, based on the computer's calendar. Read more about computer date/program date in the introduction manual "Settings, Reports and Filters".

Tip! Click the name of the month in order to select month. You can also click the year to select year.

Arrow Keys: You can also use the arrow keys on your keyboard to browse the calendar.

Documents

The integrated document module makes it easy to stay on top of all documents regardless of whether they were created in the Contact module, Activity module, the Project register or the Employee register. New documents can be created directly from the Document list or via the **Document** tab in the aforementioned modules.

Documents that have been created outside of the program can be imported and linked to current contacts/customers/suppliers, which helps you keep a better overview of all your documents. If you have chosen to synchronise your program with Microsoft Outlook you will also be able to stipulate that attachments you receive by e-mail should be imported into the document register.

The program comes with a number of document templates, which you can edit and customise to suit your needs; you can also create your own templates. Using document templates gives you the opportunity to merge documents with any required selection of contacts or employees.

In the **User Settings for Document** you can customise which columns you want displayed in the Document list, as well as how the Document card should look and function when creating new documents.

If you would like to send a document by e-mail or fax you can do this from the Document list and the Document card for any document. You can also duplicate a document to .pdf-format if required.

What is the difference between a document and a report?

In the program, the term **Document** is used for documents that are created in e.g. Word, Excel or PowerPoint and that can be edited and customised directly at document level.

A **Report** shows information based on data that is registered in the program and a chosen selection. When a report is generated it is possible to send the contents to preview but it is not possible to make changes to the content directly in the report. Reports may be generated from several of the modules in the program, e.g. **Sales/Invoicing** and **Purchase Order** but also via the **Report Module**.

Access, storage and backup of documents

With the help of different document types it is possible for you to determine where the different types should be stored and you can decide user access rights that will apply to a document type. .

When you take backups, you can decide whether you want to include documents or not, but please note that only documents stored in common folders will be included if you decide to include documents in your backup. Documents saved locally on the user's machines, for example under **My documents**, have to be backed up individually by the user.

Mamut Online Backup: Mamut Online Backup allows you to perform secure and efficient backup and to distribute your files safely in an easy, user-friendly way! is offering free Online Backup to all businesses and individuals through the Mamut Open Services concept. Mamut Online Backup is easy to use and encrypted backups are taken continuously while the user is connected to the Internet. The service does not replace your backups from within the program, but can help you to store the backup copy you are taking through the program's own function for this in a secure manner. Read more about the service at www.mamut.uk/onlinebackup.

Note! The program does not support revision handling for documents. Each document has to be saved with a new file name if you want to hold on to several versions of the same document.

The Document List

The **Document list** gives an overview of all or selected documents you and other program users have created. There are several functions to help you sort the list so that you can easily find what you are looking for. There are also search functions available that could be useful when searching among a large number of documents.

You can create new or edit information regarding documents in the Document List.

Delete: Here you can delete the selected document(s).

By using the Filter Settings in the toolbar, you can define an advanced selection, doing this will override the individual filters at the top of the window (see below). Read more about filters in the introduction manual "Settings, Reports and Filters".

Import documents: Documents created externally of Mamut can be imported into the **Document register**. Documents registered on contacts are automatically imported to the **Document List** while documents sent to you from your contacts can be imported manually.

Document Templates: A document template is a document type containing predefined information about font, size, logo, margins, header, footer and fixed text. Using document templates is a convenient way of creating documents which are similar in style.

Convert to PDF: Create a PDF copy of your documents.

Publish to Mamut Online Desktop: If you have a Mamut One Service Agreement that contains the functionality Report Archive in Mamut Online Desktop, you are able to publish documents to Mamut Online Desktop with the help of this button.

Send e-mail: You can send documents as e-mail attachments from the Document List. Select the check box next to the document(s) you want to e-mail and click **Send e-mail**. Your default e-mail editor for Mamut Business Software will open with the selected document(s)

attached. Note, that merge documents and documents that are published to Mamut Online Desktop cannot be attached. Nevertheless, a document published to Mamut Online Desktop can have an equivalent in your database, which you can attach.

Tip! You can select the default e-mail editor for your user via **View - Settings - User - Settings per Module - Outlook.** Read more below

Send fax: In order to send documents by fax in Mamut Business Software, you must first install WinFax and register the contact's fax number on the contact card.

Tip! By right-clicking on the document in the list you can open it, print it out, edit the document card, or send the document by e-mail or fax.

Create Activity: By clicking on the arrow to the right of the **Create activity** button you can create customised activities for which you can decide the content and which modules the activity template should be available in.

In the **User Settings** for documents, you can define which columns should be displayed in the document list. You can also define the layout and function of the document card.

The filters in the document list

At the top of the window you will find several filters that will limit which documents are displayed. Changes in the filters will display once you click **Update** or use the [F5] button.

Document type: Shows a particular type of document in the window, such as internal documents, documents for employees or documents for contacts, project documents or those marked private.

Author: Shows all documents drawn up by a particular user.

Project: Shows all documents belonging to a particular project.

Status: Shows all documents with a particular status.

Selecting **All** deactivates the filters.

Remember to click **Update** when you have altered a filter.

How to create a new Document

How to create a new document

1. Go to **View - Document - New Document**.
2. Click on **New**.
3. Enter a **Heading** for the document.
4. Select a **Date**, **Author**, **Our ref.** and a **Project** (if appropriate) for the document
5. Select the document **Type**, **Program** and **Doc. template** and if necessary change the **Status**.
6. Enter any notes or information you may have in the **Body text** and **Note** tabs.
7. Add the contacts or employees linked to the document under the relevant tabs.
   Note! You can skip adding contacts and employees manually and instead make use of the wizard that opens when you click on **Create/merge**. Please note that you cannot merge information from both contacts and employees in the same document.
8. Click on **Create/merge** to create the document.

   You have now created a new document, which will be accessible from the Document List and in the Document tabs for the selected contact(s).

In the Document Card that opens when you create a new document, you fill in a number of properties values about the document.

You open the document card by selecting **View - Document - Document List**. If you want to create a new document, click **New**. If you want to edit an existing document or its information on the document card, click **Edit**. Alternatively, if you want to create a new document, you can open the document card by selecting **View - Document - New Document**.

Tip! You can find a **Document** tab in the Contact, Project, Employee Register, Contact Persons and Activity modules. This gives you the possibility to edit/create documents directly from within a module. You will find more information in the descriptions of these modules.

Note! You can link a document to one or several employees or contacts/contact persons. You can do so either by adding the employee or contact to the respective tabs and the clicking on **Create/merge** or you can skip adding contacts and employees manually and instead make use of the wizard that opens when you click on **Create/merge**. Please note that you cannot merge information from both contacts and employees in the same document.

In help (F1), you can find more information about the fields and tabs in the document card.

The Wizard for linking Contacts to a Document

When creating documents you can either link contacts manually via the **Contacts** tab in the document card, or you can add a selection of contacts with the help of a wizard. If the document is to be merged with a small number of contacts, it will be easiest to add these contacts/contact persons manually, whereas it would be quicker to use the wizard when wanting to link a larger selection of contacts that are to receive the document.

Note! The wizard will only start if no contacts/contact persons were added manually in the **Contacts** tab.

The wizard is activated from the document card by clicking on the **Create/Merge** button. The program first checks whether any contacts were added manually in the **Contacts** tab; if not, the wizard will start. In the first step of the wizard you need to select the document which the contact(s) should be linked to. If you select **One Contact** the document will be created and the contact's information will be merged into the document, provided that the document contains the necessary merge fields for this.

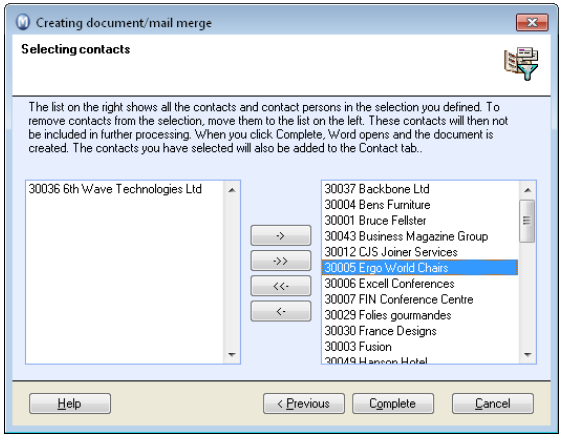
If you select **More than one contact (mail merge)** you are taken to a new screen where you can enter criteria for the selection of contacts to be linked into the document. For example, you can select that all contacts in a specific line of business or Category should receive the document. When the document has been completed it will be available in the **Documents** tab of the contact card for all involved contacts.

Note! It is possible to link contacts and contact persons once the document has been created, but a message will then be displayed stating that the document has already been created and that new contact information will not be merged into the document.

How to link in several contacts via the wizard

1. Go to **View - Document - New Document**.
2. Select **Contact** from the drop-down list **Type**.
3. Click **Create/merge**.
4. Select **More than one contact (mail merge)** and click **Next**.
5. Make your selection for the contacts.
6. Click **OK**.

7. Edit the selection manually as required, to add or remove individual contacts.



8. Click **Complete**.
9. If you wish, you can edit the document that opens.
10. Click **Save** and close the document.

The selected contacts have now been merged into the document and the Contacts tab in the document card is updated with the chosen contacts and contact persons.

Tip! If you would like to view all merged contacts you need to click on the **ABC** button (View merged data). You can browse among the contacts by clicking the arrows in the toolbar.

Wizard for linking Employees to a Document

When creating documents you can either link employees manually via the **Employees** tab in the document card, or you can add a selection of employees with the help of a wizard. If the document is to be merged with a small number of employees it will be easiest to add these manually, whereas it would be quicker to use the wizard when wanting to link a larger selection of employees that are to receive the document.

Note! The wizard will only start if no employees were added manually in the **Employees** tab and if you selected a document template containing merge fields for employees.

The wizard is activated from the document card by clicking on the **Create/Merge** button. The program then first checks whether any employees were added manually in the **Employees** tab; if not, the wizard will start.

Tip! In help (F1), you can find more information about the wizard for linking employees to a document.

User Settings for Document

In the **User Settings for Document** you can customise which columns you want displayed in the Document list as well as how the Document card should look and function when creating new documents.

The settings provide options for customising the software for every individual user and their preferences. Using the Document module will become more efficient once you set default values that apply when you create new documents. Additionally, you can decide to add information about date/time and user when notes are inserted, for example, or that a default company contact should be linked to the document if it is created from the contact card.

Default Setup

You can select between three pre-defined settings.

Simple: Simplifies the screen and displays only some of the fields.

Normal: Displays the most common fields and makes standard functionality available.

Advanced: Displays all available fields and more functionality.

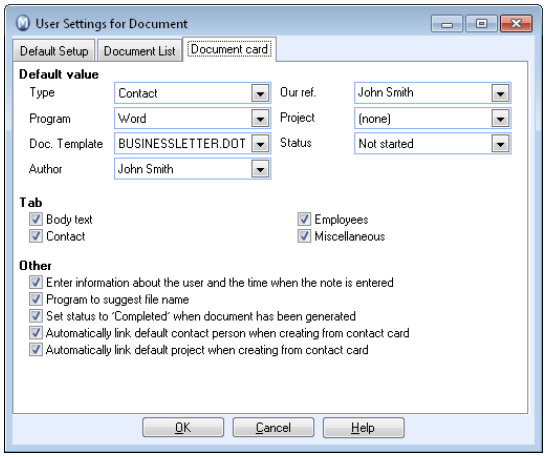
Click the relevant button to select an option.

Document list

Here you select which document fields should be displayed in the document list. Please note that there should not be too many columns in the list. This will make it appear untidy and might also affect the speed of the module. By clicking on one of the buttons in the **Default Setup** tab, the content will change accordingly.

Document card

This is where you can set guidelines for the way a document is created.



Default value: All values you set here will be selected automatically when you create a new document. If you usually create documents of the same type, this saves you a lot of time spent on repetitive routine work because the fields have already been completed.

Tab: Select the tabs to be displayed in the document card here.

Other: Among other things, you can turn on the function for inserting user name and date/time when a Note is started, and specify that the status should be set to **Completed** as soon as the document is generated. Tick the relevant check boxes for the selection desired.

Scanning Documents

Invoices, journal entries and requisitions can be scanned and saved before being processed further electronically. If you have a scanner, you can scan your documents and save them as attachments, e.g. to journal entries in the program.

Some program suppliers deliver custom-made programs for the scanning and further electronic processing of different types of documents. Especially invoices from your suppliers are specifically well-suited for this type of treatment. To facilitate this, you require scanning software and often also OCR software. OCR stands for Optical Character Recognition and is a program which 'reads' and translates texts in an electronic document and which you can gradually 'teach' to translate texts you scan often.

It is possible to import journals that are scanned and posted in the Compello program. This requires an Additional Product licence.

How to create a copy in .pdf-format

Documents created in MS word can be duplicated to .pdf-format as required. The advantage with .pdf-format files is that the content cannot be edited; a useful feature when sending quotes, for example.

Another good reason for converting a document to .pdf is that many companies restrict the file types you are allowed to open within their network. Most people regard .pdf-files as safe and the files can also be read by all recipients regardless of their operating system or software.

Note! PDF stands for *Portable Document Format* and the file format can be opened on all machines that have Acrobat Reader installed.

The **Duplicate to PDF** button is available both from the document list, and from the document card for every single document.

How to duplicate a document to a PDF file

1. Select the document you want to duplicate from the Document list.
2. Click **Duplicate to PDF**
3. Close and save the new document card for the file in .pdf-format.

The new document - with the file extension .PDF - will be available in the Documents list.

Note! The **Duplicate to PDF**-button will only become available once the document is created.

Tip! You can print different items from the system to e-mail, e.g. a quotation or an invoice. The program will then automatically create an attachment to the e-mail in pdf-format.

Document Templates

A document template is a special type of document that contains pre-defined information, e.g. font and font size, logos, margins, headers and footers or set text. Additionally, you can add merge fields, which allow you to merge contact information for employees or contacts/contact persons that are registered in the program with the document.

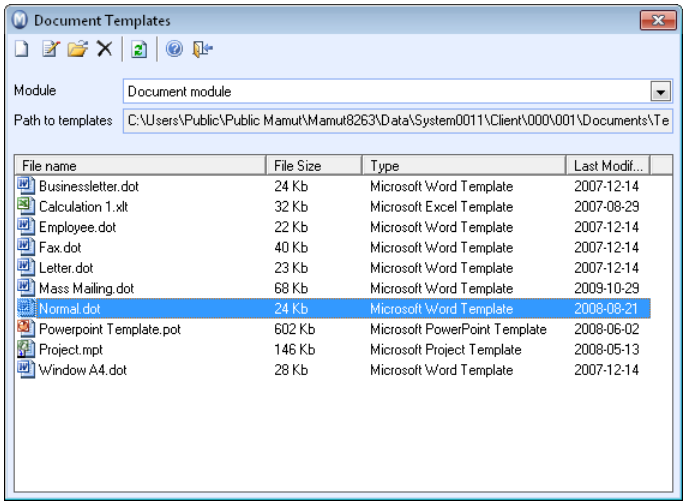
Document templates are used to simplify working with documents that should have the same or similar layout. All documents created based on a chosen template will contain the same information that was pre-defined for the template. This can save you a lot of time when creating documents after you put a little initial effort into preparing and adjusting document templates for documents you use frequently.

The program comes with a number of document templates that can either be applied as they are or you can customise them to match your company's needs. You can also create your own templates from scratch if you want.

Merge fields in Word

For templates in Word it is possible to set in merge fields that merge contact information for employees or contacts/contact persons into the document. Merge fields are inserted by clicking on the **Insert Merge Fields** button in Microsoft Word. This will open a list of possible fields for insertion into the document template. These fields will be filled in automatically afterwards when you create a document based on the document template. Remember that merge fields may also be formatted and moved as you wish.

The Document Templates Window



From the **Document templates** overview window you have access to all document templates belonging to the active company database. The **Module** drop-down list allows you to select which type of templates you want displayed in the list. Document templates are divided into the following groups: Document module, Contact module, E-Mail templates and Quotation template. The **Path to templates** field shows you where the document templates are saved.

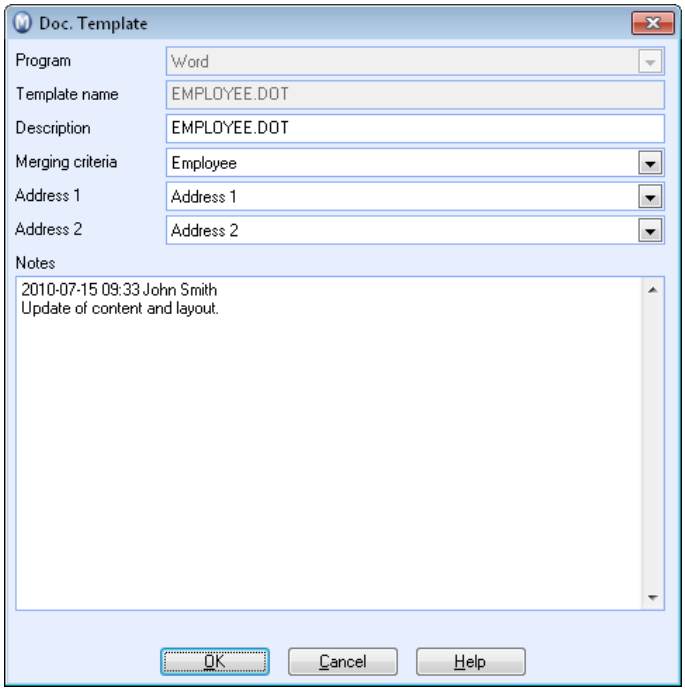
From the list you can create new document templates, edit descriptions, merge fields and other information about a template, as well as open and edit existing templates.

Note! The templates are unique for each company database.

Create a new Document Template

How to create a new document template

1. Go to **View - Document - Document Templates**.



2. Click **New**.
3. Select which program the template should be created in from the relevant drop-down list. Remember that it is only possible to enter merge fields into Word-templates.
4. Enter a **Template name** and a brief **Description** of its purpose.
5. Select whether the **Merging criteria** should be contacts or employees.
6. Select the type of address information you want in the **Address 1** and **Address 2** drop-down lists.
7. Enter any notes about the document template you may have.
8. Click **OK**.
9. Enter any merge fields you require, logos, texts and other elements into the template.
10. Click **Save** when you are done adjusting the template.
11. Click **Close**.

The document template is now ready for use.

Tips for Word 2003: If you cannot see the Merge toolbar when Word opens, you can activate it by going to **View - Toolbars - Mail Merge** in Word.

Tips for Word 2007: If you cannot see the Merge toolbar when Word opens, you can activate it by selecting the tabbed card **Mailing - Start Mail Merge** in Word.

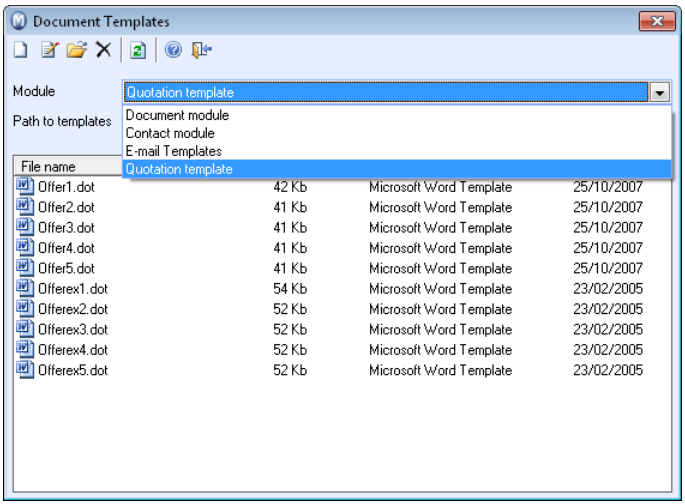
Create new document templates for quotations

In the document module you are able to create and edit document templates for quotations. These will be available when you choose to **Print** a quotation to Microsoft Office Word from the quotation register. The new templates will be stored in the Quotation template module, under the same path as the other quotations. Read more about printing quotations in the Quotation section.

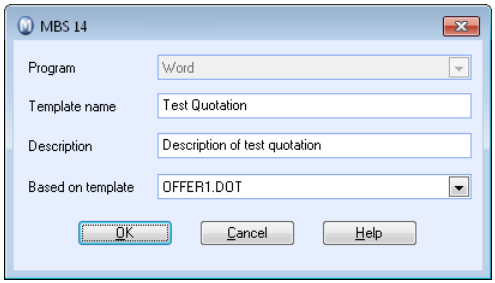
Read more about document templates in the Document Template section.

How to create a new document template for a quotation

1. Click **View - Document - Document Templates**, then choose **Quotation template** from the Module drop-down list.



2. Click **New** in the upper toolbar.
   When you click **New** a pop-up window will appear on the screen.



3. The window consists of the following fields that you need to define:
   Program: This field will always be Word and it will not possible to edit it.
   Template name: Here you can enter the document template name. Note that the template name cannot be edited after the template has been created.
   Description: Here you can add a description of the document template. Max. valid range is 50 characters.
   Based on template: Here you can select from the existing templates, and define which one you wish to use to base the new template on, (None) is not an option.
4. Click **OK** once you have defined these fields. The document template will now open.
5. You can edit the template as required, for example by inserting a logo, text and additional elements that you wish to be included within the template.
6. Click **Save** once you are finished adjusting and editing the template, and close Word.

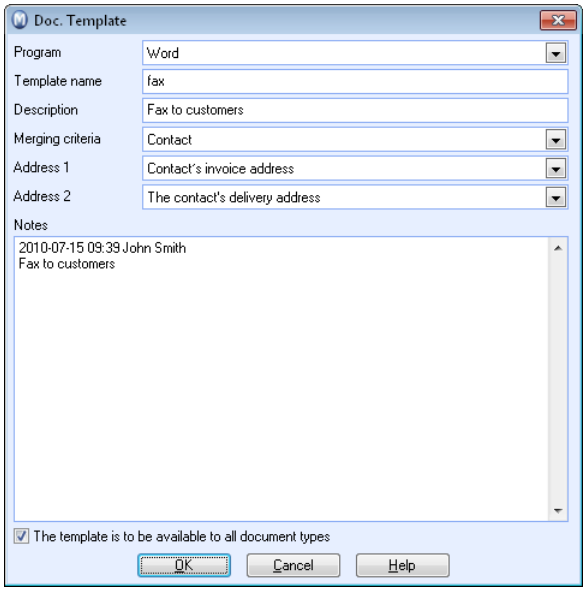
The document template is now ready for use.

The new document will be stored in the Quotation template module, under the same path as the other quotations. Once the template has been created, and you open this window again, the template name will not be editable.

Tip! Once you have created a new quotation template, you are able to edit or delete it. To do so, go to **View - Document - Document Templates**, select the **Quotation Template** module and select the new quotation template and click **Edit** or **Delete** in the upper toolbar.

Document Template Properties

The **Document templates** window opens when you create a new document template as well as when you want to edit information about an existing template. In the window you can, among other things, determine the merge criteria and which addresses should be inserted into the merge fields in the document template.



Field descriptions

Program: By default, Word is pre-selected from the drop-down list, but you can always choose to create a template in Excel, PowerPoint and Project if these programs are installed on your computer.

Template name: The **Template name** field is where you enter the name of the document template. The template name cannot be changed for existing templates.

Note! The file suffix **[.DOT]** stands for Document Template in Word.

Description: Here, you can add a further description of the document template. The information you enter here will not be shown in the document itself.

Merging criteria: For document templates in Word you can select whether the merging criteria should be based on contacts, employees or whether you do not want to apply any. Depending on your selection here, either information about contacts or employees will be merged with the template. It is not possible to merge both contact and employee information with the same document template.

Address 1: This field is only active for document templates created in Word. It allows you to enter which address you want to use for the address merge fields in the document

template. If you select contact as your merging criteria you can choose between different types of addresses for contacts and contact persons; if you selected employee as your merging criteria, you can select between different postcodes.

Address 2: This field works in the same way as the Address 1 field, so you are able to merge two addresses within the template, e.g. the postal and the delivery address.

Notes: Here, you may enter any notes you have regarding the document template. Please note that the notes will not appear in the actual document.

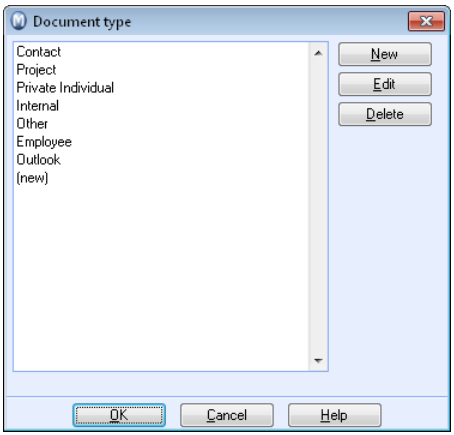
The template is to be available to all document types: This option is selected by default. Since you can decide which templates will be available for the different document types it is recommended that you make new templates available for all document types.

Note! You can change the **Description**, **Merging Criteria**, **Address 1**, **Address 2** and **Notes** fields after a template has been created and is in use. However, usually it is best to create a new document template rather than changing the merging criteria.

Document Types

The program comes with a number of predefined document types, e.g. 'Project', 'Employee', 'Internal', 'Private Individual'. If you require more document types than the default types included with the program you can create new ones in the **Properties Register**. New document types will be available from both the document list and the document card after re-opening the document list or card.

The advantages with using different document types are that documents become easier to filter and review in the document list. It also helps you regulate which document templates should be available for which document types.



Default save location

By default, the storage location is preset to the **Company database directory** for those document types which naturally belong to the company database. Document types classified as private will be saved in the user directory. Employee documents that should not be available to all users of the program will be saved in the individual employee's employee folder, to prevent others from viewing them. You can find the path to the location where documents are saved to in the **Default save location** field.

User directory: When selecting **User directory** as the save location, the document will not be included in backups without system files.

My documents: For documents saved under **My documents**, it is up to each user to ensure that the documents are backed up, as they will not be included in the program's backup function.

Company database registry: For most document types this location will be the default selection. Documents saved here can be read by all users with access rights for reading documents.

System directory: Documents saved in the **System directory** will not be included in backups without system files.

Employee folder: **Employee** type documents will be given a proposed save location in a separate **Employee folder**. Please note that you must tick the **Human Resources** box if you wish to limit access to users with access rights to read Human Resources-related documents.

User-defined: When selecting **User-defined** the field below will be activate so that you can enter your own path to where documents of this type should be saved to. User-defined locations for saving documents have to be backed up manually by each single user.

Tip! Mamut Online Backup allows you to perform secure and efficient backup and to distribute your files safely in an easy, user-friendly way! More information can be found online: www.mamut.co.uk/onlinebackup.

Document templates linked to document types

You can define which document templates should be available for a document type. A document template can be linked to as many document types as you wish.

User access to document types

If you would like to ensure that certain documents are not available to view for all users, you can define user access rights for the document type so that only those users with the appropriate access rights can read those documents.

Human Resources: Documents with this access right restriction will only be available to users with access to Human Resource documents.

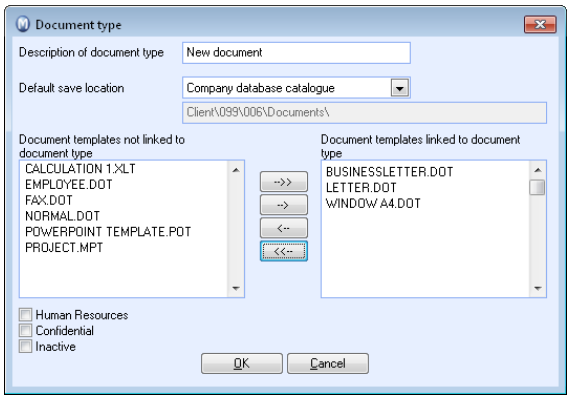
Confidential: Documents with this access right restriction will only be available to users that were given access to confidential documents.

Inactive: An inactive document type can no longer appear when using the filter in the document list and the **Type** drop-down list within the document card. The document type can no longer be selected when creating a new document but it will not affect any documents of this type that were created in the past.

How to Create a new Document Type

Creating a new document type

1. Go to **View - Settings - Company** and click on the **Properties register** button.
2. Select **Document type** and click **Edit**.
3. Click **New**.



4. Enter a suitable name in the **Description of document type** field.
5. Choose where the **Default save location** will be, from the drop-down menu for this.
6. Select the document templates to be linked to this document type using the **Document templates not linked to document type** and **Document template linked to document type** boxes via the arrow keys.
7. Indicate any limitations on user access through ticking the **Human Resources**, **Confidential** and **Inactive** boxes.
8. Click **OK**.
9. Confirm that you want to save the changes by clicking **Yes**.
10. Click **OK**.

The new document type is now ready for use.

Note! If you have created a new document type by right-clicking in the **Type** drop-down list in the document card and selecting **Change in Properties register** you need to close the document card and re-open it in order for the new document type to become available.

Importing Documents

Documents that were created before you started using Mamut or documents that, for some reason, were created outside the program can be imported in the Document Register to provide you with a better overview over all your documents. Documents you import can be linked to a contact, an employee or a project.

Note! The program supports the import of all file formats but please remember that you will need the file-related programs installed on your machine in order to be able to open the documents.

During the importing of a document, a document card opens where you enter information about the document you are importing. Some information will be filled in automatically, depending on the settings you have made in the **User Settings for Documents**.

If you are importing several files at once you will receive a pop-up note informing you that you can fill in common information for the documents you are importing in a blank product card that opens during the import.

Remember that you select several documents at once by holding down the **[CTRL]** key on your keyboard and at the same time clicking on the files you want to import.

During the import, the document names are checked to see if they already exist within the program. If a matching name is found you will be notified about this and told which files are not being imported. If you would like to import a document that appears to exist in the program already, you can import the single document again and change the document name.

How to Import Document Files

How to import documents

1. Select **View - Document** and click **Import document(s)**.
2. Browse for or select the document/documents you want to import.
3. Click **Open**.
4. Fill in any information you want to record about the document in the document card that opens.
5. The program checks whether any of the files you have selected already exist. Only the document name is checked. If it already exists, a message will be displayed showing the files that will not be imported.
6. Click **Save** and close the document card.

   The selected documents are copied to the entered document location and the document list is updated with the documents you have imported.

Furthermore, you are able to import documents with the help of the appropriate button in the **Document** tab in the Contact, Company contact, Activity, Project and Employee Register modules.

Importing using Drag & Drop

Documents can also be imported via the 'Drag & Drop' method. For this you need to open Windows Explorer so that you can see and select the file you wish to import into Mamut. At the same time you need to have the document list in Mamut open. Now hold down the left mouse button and drag the document from Windows Explorer into the document list in Mamut.

Remember that you select several documents at once by holding down the **[CTRL]** key on your keyboard and at the same time clicking on the files you want to import.

Tip! You can also import documents by going to **File - Import - Document - Import document(s).**

Skype Integration

With Skype you can ring contacts from their contact or contact person card. You can also receive calls. If the contact is registered with a **Skype name** and **Skype number** in the contact or contact person register, the contact's entry will open. Calls with existing contacts are logged as activities so that you can easily access the contact's call history later.

What is Skype?

Skype is free software that can be downloaded from www.skype.com. With Skype you can call other Skype users for free, and send direct messages to other users. You can also call regular landlines and mobile phones, but you are required to purchase credit to do so. The program is installed on your PC and you require sound equipment on your machine in order to make and receive calls. You can even get special telephones with Skype software installed.

Skype name

The Skype name is the name users are given when they register with Skype. The name is the user's ID when Skype users are contacting one another. You register this Skype name for your contacts in the contact and contact person card.

Skype number/SkypeIn

You can order the SkypeIn service with Skype. SkypeIn gives you a regular telephone number, which means that others can ring you on a 'regular' number from any type of phone. You will receive your Skype calls regardless of where you are.

SkypeOut

If you purchase SkypeOut credit, you will be able to call regular landlines and mobile phones nationwide and abroad from Skype.

Other services

You can order services that allow you to call regular landlines and mobile phones at home and abroad. You can also order a telephone number - a Skype number - so that you can receive calls from non-Skype phones. You can find more detailed information on Skype on its website at www.skype.com.

Getting Started with Skype

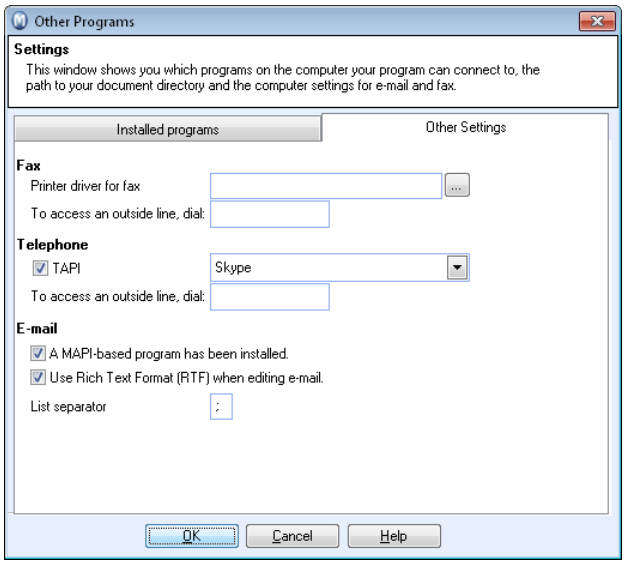
What you need to get started

Skype installation: You need to install Skype on the same machine as your Mamut Business Software and you will need to register yourself as a Skype user. If you would also like to call regular landlines or mobile phones and not only other Skype users, you will have to purchase some Skype credit/SkypeOut. If you would like that non-Skype users can call you from a land line or mobile phone, you will need to get a SkypeIn number. Find out more about Skype on their home page at www.skype.com.

Network: Skype needs to be installed on the machines of all users who will use this function.

How to get started

1. Select **Skype** as **TAPI** in Mamut Business Software.
   This can be done under **Settings - Other Settings - Other programs** in the tab **Other settings**. Tick the **TAPI** box and choose **Skype** from the drop-down list. Allow the program to use Skype if you should receive a warning about this.



2. Enter the **Skype name** for all your contacts that are using Skype as well. You will find the registration field together with the regular Telephone numbers in the Contact card. You can also add a **Skype name** to a Company contact.

   The program is now ready to make and receive Skype calls. Your contacts and contact persons will have been given new fields for Skype number and Skype name in the Telephone field. You will also be able to see the telephone icon to the right of this field.

Note! The **Skype name** is used to call other Skype users. The **Skype number** (SkypeIn) is required to call a Skype user from a regular landline or mobile phone. You do not need this number for your contacts if you are ringing them through Skype.

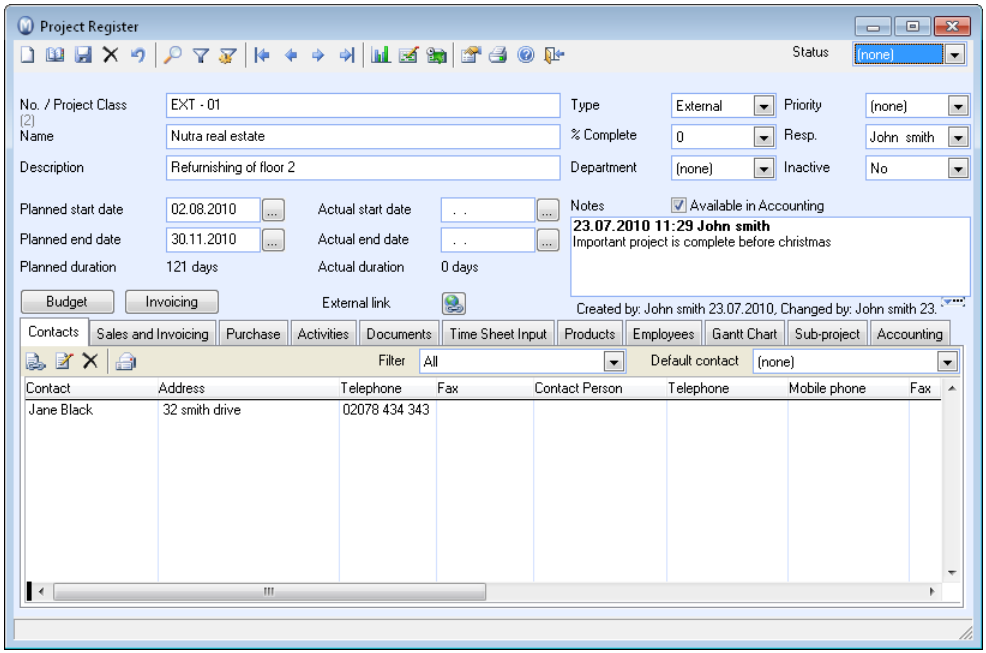
When you activate Skype you will receive a message from the program asking if it should allow Mamut to call. If you at any point answered **No** here, you can undo this setting in Skype under **Tools - Options - Privacy - Manage other programs' access to Skype**. Please refer to the Skype home page www.skype.com for more detailed information.

In help (F1), you can find more information about Skype integration.

Project

The project module has been organised with project management in mind. You can register new contacts, orders, activities etc. through the various tabs in the project register. This module is closely integrated with the other modules in the program leaving you to decide whether you want to work project orientated or not.

The project register can be opened by selecting **View - Project** - **Project Register**. You can select whether you want the project list to open automatically when you open the project module by selecting **View** - **Settings - User - Settings per Module - Project**.



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 project duration and make comparisons with actual hours spent on the project. You can also define a simple **Budget** for the project.

If you have Microsoft Project installed on your computer the **Gantt Chart** tab will be available within the project register. In the **Gantt Chart** tab, you are able to create new Gantt charts through Microsoft Project which enable you to visualise the duration and development of the project.

A project can be part of another project. It is then called a sub-project.

Integration with other modules

Various contacts and contact persons can be involved in a project. They can be linked to the project via the **Contacts** tab in the project register. You can select a contact as **Default contact** for easier overview.

> **Note!** You cannot create new projects from the Project tab in the contact module. You can only edit an existing project by using the **Edit** button on the tab.

Via the **Sales and Invoicing** tab in the project register, you can enter new orders related to the project. In the **Purchase** tab you can view purchases that are registered with a link to the project. You can create activities and documents linked to a project, register time sheet input and link products to the project. You can also link your employees to the project.

Invoicing

You can invoice the project based on two different invoicing methods: Onward billing based on purchasing and time sheet input and Onward billing based on fixed price.

How to create a new project

1. Select **View - Project** and **Project register.**
2. Click **New.**
3. Enter the desired **No. / Project class** and **name** as well as a more detailed description in the **Description** field.
4. When you fill out **Planned start date** and **Planned end date** the program automatically fills out the project's **Planned duration.** Enter the actual start/end dates when you know them.
5. 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.
6. Change the **% Complete** if this is set to 0. You can create your own percentages in the **Properties register** by right-clicking the mouse and choosing **Change in properties register.**
7. Select if the project is linked to a department.
8. Enter the project's **Priority** in the drop-down list.
9. Select the employee in your company who will be **Responsible** for the project.
10. Enter **Notes** if necessary.
11. The **Available in accounting** check box is defaulted to this setting. Un-check this if you do not want the project available in the program's accounting modules.
12. Click on the **Budget** button to enter budget numbers for the project.
13. Click this icon to enter the project's URL should it have a website.
14. You can add more information under the tabs in the bottom half of the **Project Register**.
15. Save the project.

The project has been created.

User Settings for Project

By clicking on the **User settings** icon in the toolbar you can adapt the Project module to your needs. You can also select **View** - **Settings** - **User** - **Settings per Module** and **Project** to open this setting.

The screen contains the tabs **Default Setup**, **Contact person** and **Tab.**

Default setup

You can select between three prefixed settings.

Simple: Simplifies the screen as much as possible and shows only a few fields.

Normal: Shows the most common fields and makes standard default settings available.

Advanced: Shows all available fields and more functionality.

If you want to adapt the screen you can do this under the Tab setting. Click the actual button to make your selection. If you wish to customise the screen you can do this under **Tab**.

Project card

This is where you decide what **Default values** to apply for a new project.

You can enter **Planned start date** and **Actual start date**, or you can select to use the **Program date** instead by ticking the appropriate box. Choose whether you want new projects to automatically be set as 'Internal' or 'External' in the **Type** drop-down list. The **% Complete** field defaults to 0; you can, however, choose other options from the drop-down list.

If you want the **Priority**, **Department** and **Responsible** field filled in automatically for new projects, make your default selection here.

The **Available in accounting** check box is ticked by default, but if you do not want the projects to be available in the accounting modules, you can simply de-select the box.

Under **Other**, you can select whether you want the project register opened automatically when the Project card is opened. This might be useful if you are working on several projects.

Enter information about the user and the time when the note is entered is selected by default; you can un-tick the box if you do not want this information to show.

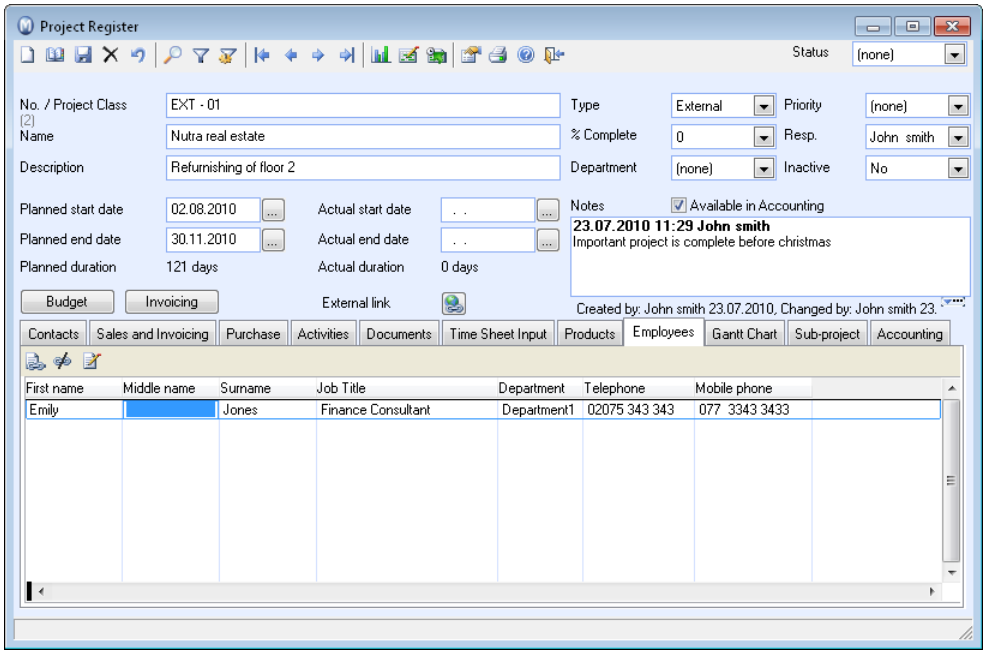
Tab

You can decide what tabs are to be shown in the **Project module** by selecting the corresponding tab boxes. We recommend that you do not select the tabs that you do not use, to obtain a better screen overview.

Under **Other** you can also decide whether the totals for Sales/Invoicing and Purchasing are to be shown **incl. VAT**.

The Project Register

In the **Project Register**, you can register projects and keep an overview of the many Contacts, Sales, Invoices, Quotations, Activities, Documents, Time sheets, Products, Employees, and Sub-projects linked to the project. It could prove helpful to use the Project register in order to be able to monitor expenses and revenues linked to a project as well as being able to see whether or not the project is profitable.



In **User settings for Project** you can define default values for several of the fields in the top half of the project card. When setting up default values you avoid having to fill out information that is the same for all projects.

> **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.

The **Project status** button provides an overview of the displayed project. You can view all registered hours as well as orders and purchases that were made in connection with the project.

By using the **Change Status** button you can change project status and register the date and time it was amended.

The **Project Status overview** button provides an overview of the status changes that have made through the **Change Status button.** You can view date, status and duration for each status the project has had.

The **Status** drop-down list in the upper-right corner of the window indicates the current status of the project. When you open the project module, the last changed project will be displayed. You can use the drop-down list as filter if you want to open other statuses. Read more about how to use the drop-down list in the chapter "Getting to know the Program" in the introduction manual "Settings, Reports and Filters".

More information about the fields in the main window can be found in the section "How to Create a New Project".

The Project Register tabs

Contacts

The **Contacts** tab lets you link contacts to projects, delete links between projects and contacts and edit existing contact information. It is also possible to e-mail contacts directly from this tab.

> **Tip!** You can right-click inside the list; this will give you direct access to **Go to contact** and contact person and to sending an e-mail among other things.

How to add a new contact to the project

1. Click **Link** to create a link between a contact (includes contact persons) and a project.
2. Select which contact and contact person you would like to link to the project in the opening screen. Telephone and fax numbers are automatically included.

   The contact is now linked to the project and you can open the contact card directly from here.

You can delete the link by clicking on the **Delete** button. This action will not delete the actual contact, just the link.

Filter: For a quick overview of the customers and suppliers involved in the project, select **Customers** or **Suppliers** from the **Filter** drop-down list. This acts as a filter and will provide you with the information you need.

Default contact: You can select a default contact for the project in the Default contact drop-down list to the right in the tab. The contact you select here will display in bold type in the top part of the contact card.

> Click on the **Send E-mail** button to send an e-mail to the contact you have marked in the list.

Sales and Invoicing

The **Sales and Invoicing** tab is where you register new orders related to the project. To access it go to **View - Project - Project register - Sales and Invoicing**.

The two columns furthest to the right, **Total excl. VAT** and **Total project excl. VAT**, may show different sums, because:

By selecting the check box **Project** under **User Settings** in the **Sales and Invoicing** module, the **Projects** column appears under the **Product lines** tab. The column allows you to specify which project each product included in an order belongs to. This means that an order can be classified as one project in the **Project** drop-down list in the upper half of the order card, while the products in the order can be registered to other projects.

For this reason you have two separate columns in the **Sales and Invoicing** tab. The column **Total excl. VAT** shows the total amount of all products included in the order, while the **Total project excl. VAT** column shows the amount for the products belonging to the specific project included in the order.

The **Filter** drop-down list acts as a filter, providing you with an overview of various order and offer statuses.

How to create an order relating to the project

1. Click **New** to create an order related to the project.
2. In the screen that opens select contact and company contact. The **Sales/Invoicing** module opens automatically with the contact information.
3. View the chapter on **Sales/Invoicing** for a detailed explanation on how information is registered. When you have completed the order you close the module and return to the **Sales/Invoicing** tab in the project register.
4. Click the **Edit** button to change an order you created.

   The Sales/Invoicing module will open and you can make the amendments you wish.

The **Created from** drop-down list enables you to see where the order was created. Available options include viewing **All orders** regardless of where they were created. You can also filter orders registered in the **Sales and Invoicing** module. If you select **Sales and Invoicing** from the pull-down menu, the orders that were marked with the particular project in the order card, will show in the list on the tab. You can also select **Project register** and filter orders that have been created in the **Sales and Invoicing** tab in the **Project** register.

Quotation

In the Quotation tab in the projects register you can view and create new Quotations related to that Project. If you want to create a repeating quotation click the arrow next to the **New** button and select **Quotation repeating** from the drop-down menu.

> **Note!** The **Status** drop-down list in the **Quotation tab** acts as a filter. The choices you make here determine what is shown in the tab. If, for example, you select **Quotation repeating**, the tab will only show group quotations and no other categories.

From the **Status** drop-down list you can filter and view all quotations in a given status.

Remember to click the **Update** button after changing status.

Purchase

The purpose of the **Purchase** tab is to give you an overview of purchases made in connection with the project. You can also make changes and create new purchase orders here.

You can create a new purchase directly from the tab card by clicking on **New**. This will open the purchase module for a new purchase, where the contact information from the supplier's contact card has been automatically entered already.

If a purchase is already linked to a project, you can make changes to it by clicking on the **Edit** button.

Filter

For a quick overview on purchases involved in the project based on status, use the **Filter** drop-down list. This acts as a filter and will help you find the information you require.

Activities

In the **Activities** tab you can create new activities linked to the project, edit activities already created/linked, or delete activities.

If you have made any changes you will need to click the **Update** button to update the list of activities shown.

In the **Type** drop-down menu you can filter by the type of activity you would like to see in the tab. This may be practical to use if in time the project fill up with registered activities. You can also select whether you would like to see All, Completed or Incomplete activities.

How to link an activity to a contact

1. Click **New** to open the **Edit activities** window.
2. Enter all required information in the **Edit activities** screen.
3. Select which contact the activity involves by clicking on the **Link** button. You can also select a contact person from the drop-down list.
4. Click **OK** to update the list in the **Activities tab**.
5. Select the activity and click the **Edit** button to make any changes. The **Edit activity** screen opens and you can make the changes you need.

The activity has now been linked to the contact.

Documents

The **Documents** tab is where you can create documents connected to the project. You might need to send the same document to several contacts involved in the same project. If this is the case, click the button **Merge document** in the window **New document**.

Be aware that if you decide to **unlink** one document from the project, this action won't delete the document from your machine, just the link to the document.

Note! In the **Filter** drop-down list you can select which type of Microsoft document you want the list for an overview of. The filter allows you to select **all** documents or documents created in Microsoft Excel, PowerPoint, Acrobat, Word or Other.

You can import documents by clicking on the Import button. Read more about Importing documents in a separate section.

Read more about how to create documents from this tab through the **Documents** tab in the **Contact register**.

Time Sheet Input

The **Time sheet input** tab provides an overview of the hours worked that are registered to a project. You cannot register new hours, but you can make changes to the existing time sheets.

To register new hours, select **View** - **Time sheet input - Time Sheet Input**.

Filter! To obtain an overview of the hours in each project related to certain statuses, you can make a selection using the **Filter** drop-down list. The list acts as a filter and by using it, the list will show only the information you are looking for.

Products

In the **Products** tab, you can link products to projects, change product information and delete links between projects and products.

Note! You cannot create new products from this tab.

Employees

In the **Employees** tab, you can link your employees to the project by clicking on the **Link** icon.

To edit employee information, select the employee from the list and click **Edit**. This opens the **Employee Register** and the employee card will be displayed. You can then make the changes.

If an employee is no longer involved with the project, select the employee from the list and click **Delete.**

Note! The employee must be registered in the **Employee Register** first.

Gantt Chart

Note! You must have Microsoft Office Project® installed in order to activate the **Gantt chart** tab. To ensure Mamut has detected this program go to **View** - **Settings** - **Other Settings** - **Other Programs**. You can then see an overview of the programs Mamut has found on your computer. Click the **Search** button to update and add changes to the list.

Microsoft Project provides you with a visually enhanced tool to help you effectively manage a wide range of projects and programs. It can help your company to ensure it meets crucial deadlines, with selecting the right resources and to simplify, plan, manage, and collaborate with individuals, teams and the entire company.

In the **Gantt Chart** tab within the project register, you are able to create new Gantt charts which enable you to visualise the duration and development of the project. To access this tab, go to **View** - **Project** - **Project Register** - **Gantt Chart**. Once you have created a new document and entered the required information, simply click the **Create/merge** button in order to open the Gantt chart. Here you can plan the duration of the project and divide it into sections. This way it will be easier to estimate the amount of time the project will take altogether.

You can create a new Gantt chart by clicking the **New** button. The **New document** screen will open and you can register information about the project.

You can edit the document information by clicking on the **Edit** button. The edit document window will open and you can make the required changes.

You can open the document by selecting it and then clicking on the **Open document** button. The document will then open in Microsoft Project where you can edit and add information as required.

You can delete a document simply by selecting the **Delete** button.

You can update the document with the latest information by clicking on the **Update** button.

Note! It is particularly important that you fill in the **Heading** field when you create a new document. When you click the **Create/merge** document button, Microsoft Project will open.

Once you have created a new document, you can enter and edit plans for the project and any other additional information within the Gantt chart in Microsoft Project. You can, for example, edit the task name, main and sub items, along with the duration, including the start and finish dates. Once this information has been entered, you will be able to see a visual overview of the project.

Tip! It may be wise to divide the project up into several smaller components. The final Gantt chart will show the project's total duration including minor stages.

Sub-project

The **Sub-project** tab provides an overview of all sub-projects that are part of the project and any other projects that the project is part of. There is a direct link between this tab and the selection defined via the **Part of** functionality.

Example: **July-sales** could be part of **Summer-sales**. In the Project list for **July-sales** you select **Summer-sales** from the button **Part of**. When you look at the **Sub-project** tab in the **Summer-sales** project list, you will see **July-sales** listed.

Sub and Main projects

The **New** button (to the left of the tab) and the **Part of** button (to the far right of the tab) have opposite functions:

You click the **New** button to create a new link to a sub-project in order for the specific project (displayed in the top half of the project card) to become a main project. If you click the **Part of** button, the specific project is linked to another main project. Occasionally it is necessary to use both buttons. If, for example, the project that is displayed in the top project card is named 'January', you can link the sub-projects 'week 1', 'week 2', 'week 3' and 'week 4' to this by clicking the **New** button. Simultaneously, you can link 'January' to the larger main project 'Winter' by using the **Part of** button to the right in the tab.

Accounting

The **Accounting** tab gives you an overview of all journal entry lines in Financials and/or Journal Entry that are linked to the current project. You can select to view content by accounting year, source, journal type and/or type of account. This is done with the help of the drop-down list in the top-left.

By clicking on the **Go to invoice** button (F9) the highlighted invoice will open. You will only be able to click on the button if the select item is an invoice.

If the item is linked to a purchase you can click on the **Go to purchase** button (F7) to see more detailed information about the purchase in the purchase module.

The **Go to journal** button (Ctrl+Shift+G) takes you to the Financials where you can take a closer look at the journal entry for an item. The button will only become available for journal entries that have been transferred to the financials.

Tip! You can select which of the tabs you want to display in the user settings.

The system administrator controls whether a user will be able to view this tab through the access controls.

Project Invoicing

The **Invoicing** button is shown in the project card when **External** is selected in the **Type** drop-down list. You can specify the invoicing method in two ways.

> **Note!** You can make a selection only once for each project, which cannot be changed once it has been made.

The two options are: **Onward billing based on purchasing and time sheet input** and **Onward billing based on fixed price**.

Onward Billing Projects Transactions based on Purchasing and Time Sheet Input

You can use **Onward Billing based on purchasing and time sheet input**, providing you have registered the necessary information in the Purchasing and Time sheet input modules in advance.

How to Onward bill based on purchasing and time sheet input

1. Invoicing Click the **Invoicing** button to indicate the project's invoicing method. Select **Onward billing based on purchasing and time sheet input** from the drop-down list and click **OK**.
2. Click the **Search** button if you want to register a bank account for this project.
   If you leave this field empty, the account which is entered in the **Account no. on invoices** field under **View - Settings - Company - Financial Settings** will be used for the project invoices.
3. Enter a **Fixed text on invoice** if you want all invoices for this project to have default text.
4. Click **New** to create a new line in the Invoicing plan. A new line will be inserted where you can select **Status** and **Amount** as well as a **Comment**.
5. Invoicing Click the **Invoice** button to open the invoicing wizard.
6. Follow the five step wizard to complete the invoicing process. Enter contacts, purchase lines, time sheet input, status reports and default information linked to the project.
7. Click the **Search** button in the wizard's first screen to select the contact (and company contact) you wish to create an order for. Click **Next**.
8. The products that can be invoiced are displayed in the **Not included** field. Select which product/projects you wish to invoice and click the arrow button that points to the right. The products will be registered on the invoice. Click **Next**.
9. Select which hours from time sheet input should be invoiced in the next level of the wizard. The process is the same as for products.
10. Click **Next**.
11. Click **Complete** to create an order.

You have now created an invoice based on the purchasing and time sheet input.

Note! The **Invoicing plan** provides you with an overview of invoices linked to the project. There is only one field for user defined information and you can decide whether you want to enter information or not. No information is transferred to other modules from here.

Onward Billing Project Transactions based on Fixed Price

The amounts you enter in 'Onward billing based on fixed price' will override the ones that are registered in the **Sales/Invoicing** and **Product** module.

How to re-bill based on fixed price

1. Invoicing Click the **Invoicing** button to indicate the projects invoicing method. Select **Onward billing based on fixed price** from the drop-down list.
2. Click the **Search** button, if you want to register a bank account for this project.
   If you leave this field empty, the account which is entered in the **Account no. on invoices** field under **View - Settings - Company - Financial Settings** will be used for the project invoices.
3. Enter a **Fixed text on invoice** if you want all invoices for this project to have default text.
4. Click **New** to create a new line in the Invoicing plan. A new line is inserted where you can select **Status** and **Amount** as well as a **Comment**.
5. Invoice Click the **Invoicing** button to open the invoicing wizard.
6. Follow the five step wizard to complete the invoicing process. Enter contacts, purchase lines, time sheet input, status reports and default information linked to the project.
7. Click the **Search** button in the wizard's first screen to select the contact (and company contact) you wish to create an order for. Click **Next**.
8. The lines you entered in the draft order are displayed in the **Not included** field. Select the line/lines you wish to invoice and click the arrow button that points to the right. Click **Next**.
9. Click **Complete**.

   The order is now being created.

Invoiced total! The **Invoiced total** shows the total amount you can invoice for. You will receive a quick overview of the various amounts as well as being assured that the amount you enter in the **Invoiced total** is not overridden. The program will warn you if you try to invoice an amount higher than this.

Chapter 2: Product

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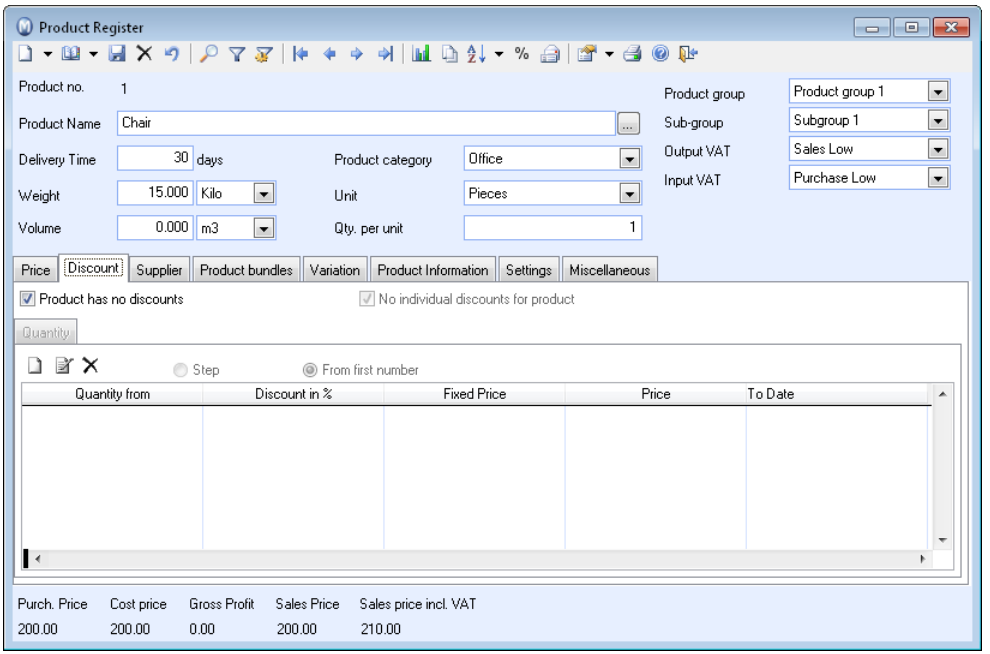
The functionality described in this chapter may be either partly or fully available within your program version. You will find a detailed overview of all of the functionality included in all Mamut products on our website at www.mamut.com/uk/functionality.

If you are unable to find the answer you are after within this chapter, you can refer to the More Information chapter where you will find tips on how you can get further help.
If you wish to order or receive more information regarding Mamut products, you can contact our sales department at sales@mamut.co.uk or by phone on 0207 153 0900.

The Product Module

For a company with thousands of products, hundreds of suppliers and numerous warehouses, it is crucial to have control of every aspect concerning product handling. For example, prices, suppliers, possible discounts, warehouse locations and stock. In the Product & Warehouse focus area you will find a complete overview of these components.



In the product register you enter all data about your company's products. This makes registration of orders and purchasing efficient, as the product information is imported from this module. From within the product register you are able to control the ways of using a product.

Methods of use and functions controlled from the Product Register

Below are some of the methods of use and functions that can be controlled from the Product Register. It is important to consider how the product will be used on creation as this will save additional work at a later stage.

Pricing/Discounts: A product can either have one price or several differentiated prices governed by date. By using a price calculator you are able to add a mark up to your product prices. You can specify expenses both as factor and percentages, and find out how the price will be influenced when for example the purchase price, expenses or the sales price change.

Warehouse: If your program function includes the warehouse function, you are able to enter your stock into the program. This includes functionality for stocktaking, multiple warehouse locations, serial number handling and best before dates along with consignments and product reservations.

Supplier/Purchasing: Suppliers usually have their own terms, prices and codes for the product you order from them. The product register contains options to help you keep track of pricing and conditions from several suppliers offering the same product.

Product bundles: If the company offers products containing several components, the product can be defined as a Product bundle. Imagine a company offering an office solution comprising two book shelves, one chair and a desk. The combined product will be defined as a product bundle. The chair, the desk and the book shelves are defined as components.

Product variation: If the company sells products that are offered in several variations, e.g. with different colours or sizes, these can be entered as variations of a product. Each variation can have its own price, warehouse handling, product information etc. This is controlled through the Variation settings. It is important that you specify variation settings before you create variations in the product register. When a product has variations, the product itself will be called a **main product**, for which you can no longer enter any transactions.

E-Commerce: If you have a licence for E-Commerce, you can sell your products on the Internet, retrieve the orders from there, and further process them within the Order/Invoice window. Your webshop will be directly connected to the **Product register** through the Website settings. You select whether the product will be for sale in your webshop as well as what product information will be displayed.

Intrastat: If you use Mamut Business Software for Intrastat statistics reports, enter the product's **Intrastat Code** under the **Miscellaneous** tab.

Printouts: The product information can be printed directly from the Product register as **product labels** and can be sent to the printer, e-mail, fax, transferred to Microsoft Office Word or to preview. If you have a Pdf printer you can transfer them to a file in Pdf-format.

Product name in several languages: One product can be displayed in multiple languages within printouts.

Other product options

For a company that sells many products it can be very time consuming to maintain the product register. The more fields you use to control your user settings for the products, the more maintenance is required. By using the Change value wizard you can update most fields for several products at a time, saving you a lot of time.

For those who have warehouse products, there is a **Stock taking** option within the **Warehouse** section.

Product settings

In addition to the options mentioned above, there are several general settings for each product. For example, settings for how the product is treated in terms of integration, purchasing, sales and warehouse. These are applied through the **Settings** tab within the Product Register.

Within the user settings for product you can decide what to display in the windows. You can also make a few selections that will simplify the registration process.

In the company settings, the user settings are controlled for all users. You also set what default values are to be applied every time someone creates a new product.

How to create a new product

How to create a new product

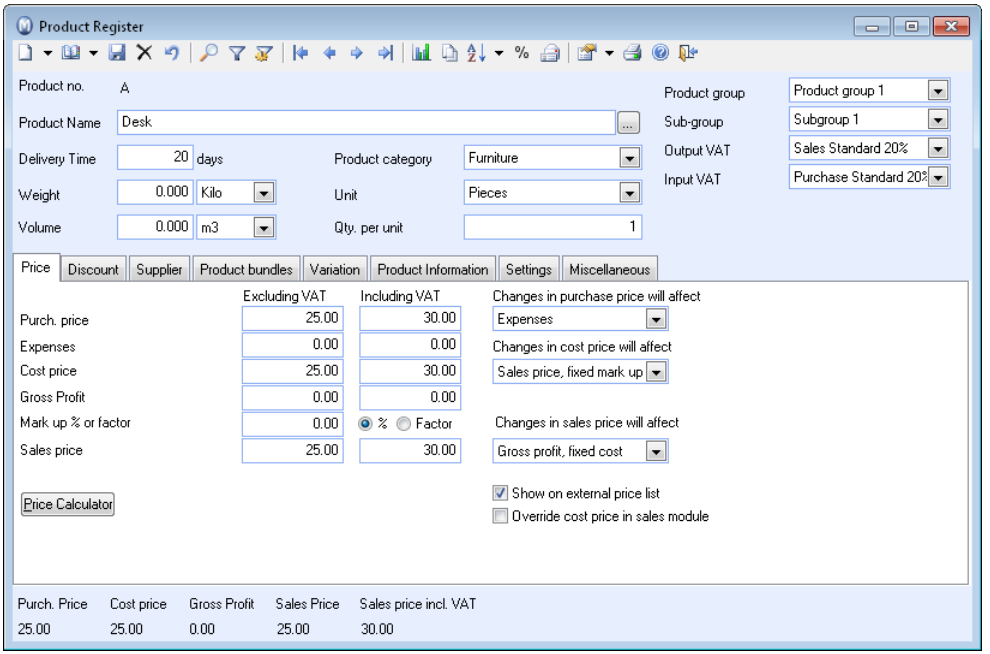
1. Go to **View - Product - Product Register**.
2. Click **New** to create a new product or click the arrow next to the **New** button.
3. Select the type of product you want to create in the pop-up window.

   Note! The window will not be displayed if you previously selected not to display it again. If you have chosen not to show the window, you can create a new product according to a registered template by clicking on the arrow beside the **New** button and selecting a template from the drop-down list.
4. Change the product number if you do not wish to use the suggested one. The change must be made before you save the product.
5. Enter the desired product name in the appropriate field.
6. Complete the fields relevant to the product.
7. Complete the relevant information for the product within the tabs in the lower section of the Product Register.
8. Click **Save** in the toolbar at the top of the screen once you have registered all desired product information.

   The product is being created.

Tip! All products are automatically numbered in a logical number series. These numbers can be overridden and can also be alphanumerical (contain both letters and numbers).

The Product Register



The **Product Register** consists of two sections, similar to that of the Contact register. The upper section contains general information about the product. The lower section consists of tabs with more detailed information about prices, discounts, suppliers and various stock values.

If there are fields or tabs that are not displayed, or which you do not want to be displayed, you can change this within the User settings for Product. You can specify which functions are available in the product register within Company Settings for Product. You will also find settings for integration with the webshop.

When you open the register for the first time, the **Customisation of functions** window will open. It is important that you select which functionality your business is using so that the Product Register can be adjusted according to your company's needs. These adjustments can also be made within the company settings, which you will find under **View - Settings - Company - Settings per Module - Product**.

Field Descriptions

Product No.: All products are automatically numbered in a logical number series. These numbers can be overridden and can also be alphanumerical (contain both letters and numbers). It is not possible to change the product numbers for those products that have already been created and are in use. Most other fields on a product card can be changed after they have been created. You can also use the **Updating a Selection of Products** wizard to change the same value for several products at the same time.

Product Name: Here, you enter a suitable name for the product. By clicking on the browse button to the right of the field you may also register the product name in other languages if you are planning to sell or buy the product abroad.

Delivery time: Register the expected delivery time here.

Weight: Register the weight here. Grams, kilos or tonnes can be selected from the pull-down list.

Volume: Register the product's volume here. You can choose between mm3, cm3, dm3 or m3.

Product category: Select your preferred category from the drop-down list. Product categories are also searchable. You can also remove, change or add categories in the **Properties Register**.

Unit: You can select the desired unit here. New values for unit can be registered in the Properties register.

Qty. **per unit**: Register the quantity per unit here.

Product group: Select the product group which the product is to belong to here. New product groups can be created in the Properties register.

Sub-group: Select the sub-group for the product here. There can be up to 4 levels of product groups and the number that can be displayed on the product card depends on the settings you have selected in **Company settings** for product in the **Default values** tab.

Output VAT: State the output VAT rate for the product.

Input VAT: State the input VAT rate for the product.

Editing or adding information in the Properties Register

You can remove, change or add categories, units, product categories, product groups and sub-groups in the **Properties Register**. You can right-click in the fields containing options from the Properties Register and select **Change in properties register**. This opens the Properties Register so that you can change or add new alternatives directly there.

You can also access the **Properties Register** by going to **View - Settings - Company - Properties Register**.

The Product List

The **Product list** is a list that shows all or a selection of products in the **Product register**. The Product list is used to select which products one wants to look more closely at or used when selecting products that are to be included in quotations, sales orders or purchases.

You can customise the product list to your needs in User settings for Product. The settings here will be common for the various modules in the system.

How do you change how the product list is sorted?

By default, the Product list is sorted by product number. You can easily change how the list is sorted by clicking on each column's heading. The list will then be sorted by the selected heading. The selected column is displayed in bold text.

How do you change which products are displayed in the list?

By default, **All products (not inactive)** will be displayed when the product list is opened. You can select which products you want to be displayed within the product list, from the pull-down list in the top right corner, and in this way limit the number of products displayed. For example, you can choose to only display Campaign products, Stock items, Product bundles, inactive products or a specific product group.

In the **User Settings for Product** you can select that the product list only display products linked to the supplier selected for that purchase, when opening the list from the Purchase module.

Tip! You can export a number of lists and tables to Excel via a right-click menu. You can create a filter for a list, then right-click - and have this selection exported to a report, which opens directly in Excel. Please note that the file is a temporary one. If you would like to keep the report, you will need to save it.

Product Register Tabs

Price

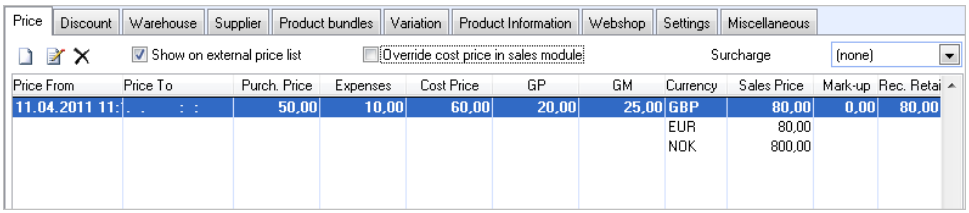
Under the **Price** tab in the Product register you define the product's sales price.

Depending on your settings defined in the company settings for products, you can track the price history for products and add several different prices determined by date. Additionally, you can add fixed prices in different currencies, if you have activated this via the company settings for products.

> **Note!** If you don't activate these settings, you can only have one sales price. The **Price** tab will then be displayed in a more simple view, where you can directly calculate your sales price. Click **Price Calculator**, if you want to use the advanced options of the price calculator.

Product prices with price history

If you have activated the company setting for price history, each price is being displayed in a separate line. The actual price is in bold whereas historic and future prices are shown normally. Prices in different currencies are displayed in the **Sales price** and **Currency** columns below the respective price line.



If you want to add a new price, click New. The price calculator will open. Here you can specify expenses, gross profit (both as factor and as percentage) and sales price, and discover how the price will be affected when, for example, the purchase price, expenses or sale price is changed. If a sales price has been defined before, the values will be inherited from the actual sales price.

If you want to adjust an existing product price or if you want to add/adjust a fixed price in a different currency, select the price line and click Edit. The price calculator will open and help you to edit the price.

> **Tip!** You can change a sales price directly in the company database currency and also in the different currencies by double clicking the respective price line.

Show on external price list: Select this option if you want the product to be displayed in the external price list. The list can be printed out for individual customers with specific discount information, etc.

Override cost price in sales module: Select this option if you want to be able to change the cost price on product lines in orders.

Surcharge: If you have activated **The company sells products with environmental tax or other special charges** in your company settings for products, this drop-down list will be displayed. Here you can add the product to a surcharge group.

Discount

You can offer discounts on each individual product based on various criteria defined in the **Discount** tab in the product register. The tab can be accessed via **View - Product - Product Register - Discount**.

Different Discount Types in the Discount Tab

Product has no discounts: Select this check box if you do not wish to associate the product with any discount. The option removes all discounts linked to the product, including discounts defined for the product group in the discount register.

No individual discounts for product: Select this check box if it should not be possible to register an individual discount for this specific product. Please note that a discount will be applied for the product if you have defined a discount for the product group in the discount register.

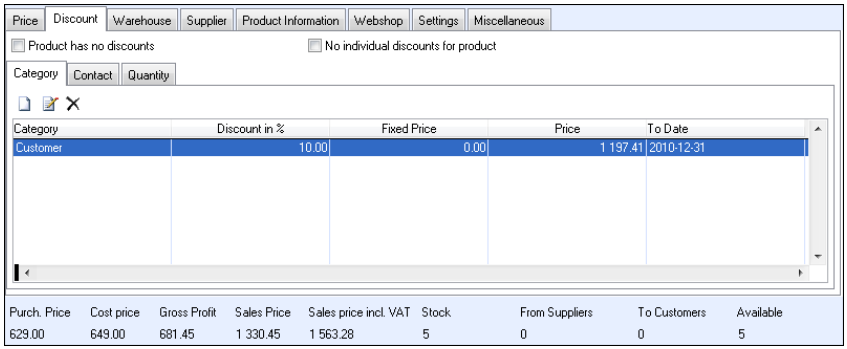
Note! You can overrule these settings in the **Sales/Invoicing** module by manually entering discounts directly on the order line. The discount entered here will overrule all other discounts. This is possible because of the discount hierarchy that is used in Mamut Business Software.

The Discount tab contains three additional tabs:

- Category
- Contact
- Quantity

Use these tabs to create different combinations of discounts.

Note! You must first activate these discount types in the company settings for product.

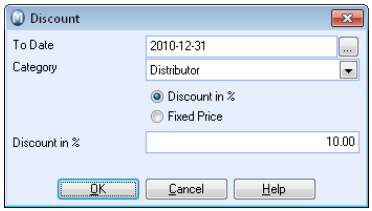


Category

You can offer discounts to one or more customer categories. You can assign your contacts to different categories via the **Category** drop-down list in the contact management module.

How to Give Discounts to a Category of Customers

1. Select the **Category** tab and click **New**.



2. The **To Date** field lets you choose when the discount will expire. If you do not enter a date, the discount will be applied until you delete the discount line.
3. In the **Category** drop-down list, select the customer category that will receive the discount.

   Tip! If you wish to enter a new discount for the same category, you must first delete the old discount for that category before you can register a new discount.
4. Select if you wish to offer the **Discount in %** or as a **Fixed Price** and enter the value.
5. Click **OK** to save the discount.

   The settings will now be added as a separate line in the tab. You can now enter new discounts for other categories.

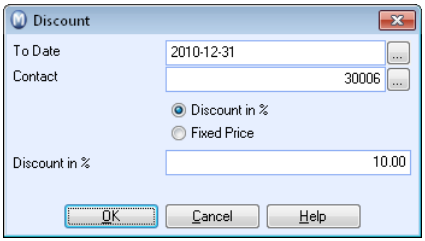
In the discount register, you can access a discount matrix where you can predefine discounts for various combinations of categories and product groups.

Contact

You can also offer discounts to one or more individual contacts.

How to Give Discounts to a Contact

1. Select the **Contact** tab and click **New**.



2. The **To Date** field lets you choose when the discount will expire. If you do not enter a date, the discount will be applied until you delete the discount line.
3. In the **Contact** field, enter which customer will receive the discount. You can either enter the contact number directly into the field, or click the search button to the right of the field and select the contact from the contact list.

   Tip! If you wish to enter a new discount for the same contact, you must first delete the old discount for that contact before you can register a new discount.
4. Select if you wish to offer the **Discount in %** or as a **Fixed Price** and enter the value.
5. Click **OK** to save the discount.

   The settings will now be added as a separate line in the tab. You can now enter new discounts for other contacts.

Tip! You can define discounts for both categories and specific contacts. If the normal "distributor" discount is 15%, you can for example choose to give an extra discount to certain distributors. This is related to the structure of the discount hierarchy in Mamut Business Software. Read more about the discount hierarchy in the "Sales Follow-up" chapter.

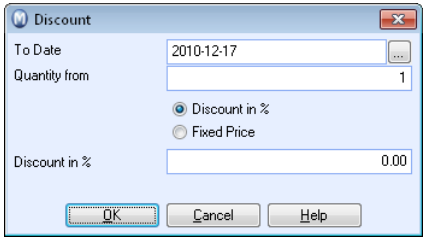
Quantity

You can offer quantity discounts on your products. Quantity discounts can either be offered in **Steps** or **From first number**. For example, if you select **Step**, you can decide to sell the first 500 units of a product with a 5% discount while the following 1000 units will be sold with a 7.5% discount.

If you select **From first number**, the same discount will apply to the entire order.

How to Give Quantity Discounts

1. Select the **Quantity** tab and click **New**.



2. The **To Date** field lets you choose when the discount will expire. If you do not enter a date, the discount will be applied until you delete the discount line.
3. In the **Quantity from** field, enter the quantity that will trigger the discount.

   Tip! If you wish to enter a new discount for the same quantity, you must first delete the old discount before you can register a new discount.
4. Select if you wish to offer the **Discount in %** or as a **Fixed Price** and enter the value.
5. Click **OK** to save the discount.

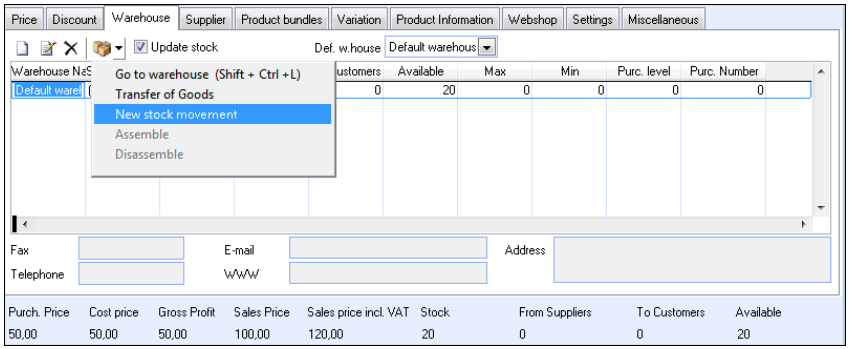
   The settings will now be added as a separate line in the tab. You can now enter new quantity discounts.

Note! If you use a **Fixed Price** when defining a discount for category, contact or quantity, the system will by default select the lowest value of the **Fixed Price** in the discount register and **Sales Price** in the price calculator. You can override this from the company settings for product, so that the fixed price works as a mark-up.

If you have selected fixed price for any of the above-mentioned discounts, any other discounts will be added in addition to other discount types.

Warehouse

Warehouse is linked to the **Sales management** module. The stock will therefore increase/decrease in accordance with purchases and sales. The tab is only available if you have specified that your company keeps products in stock within the company settings.



The only items that can be edited directly within the columns are the **Max** and **Min** stock in the warehouse, as well as the **Purch. level** and **No. purchased**. .

New: Create a warehouse link in order to sell the product from the warehouse you have selected. You are able to create a product link within the warehouse register in the warehouse module.

Delete: Deletes the warehouse link.

Go to warehouse: If you click this icon the information window of the selected warehouse opens.

If you click the arrow next to the warehouse icon, you can in addition select the following functions from a drop-down list:

Transfer of goods: If you have several warehouses or locations, you can transfer stock to one of them.

New stock movement: You can create a new manual stock movement.

Assemble: After you have created a product bundle, you can assemble the bundle in the warehouse. This function is only active for the product bundle itself (check box **Product bundle** with components is ticked on the **Product bundles** tab). Whenever a product bundle is assembled, a stock movement in the category "Assembly" is created for each component used in the assembly.

Disassemble: Here you can disassemble a product bundle in the warehouse. This function is only active if the check box **Product bundle with components** is ticked in the **Product bundles** tab.

Update stock: If the product is a stocked item, you should make sure that the **Update stock** box is ticked.

Def. w.house: The products default/predefined warehouse.

Tip! The user can select default warehouse for all products in the user settings for product.

Supplier

Suppliers usually have their own terms of trade, prices and codes for products you order from them. By linking a product to the supplier(s) you purchase the product from, you are able to register this information, together with supplementary information for the product.

Please note that the purchase price from the default supplier can affect the purchase price you register under the Price tab. When updating the default supplier's purchase price, you must choose whether or not you want to update the corresponding price within the Price calculator.

It will be possible to use the information registered in the **Supplier** tab when purchasing from relevant suppliers. If the product is linked to a supplier, you can click the button **Purchase this product** in order to create a purchase order. If an unprocessed purchase order already exists for this supplier, you can choose to add the purchase to the existing order. If you do not wish to add the order, or if there are no existing order, you can create a new purchase order.

Tip! When the product has already been included in the purchase order, the number of this product purchased will automatically be increased by 1.

You can find out more about Supplier links in the Purchase Module section of the "Financials, Logistics and Human Resources" manual.

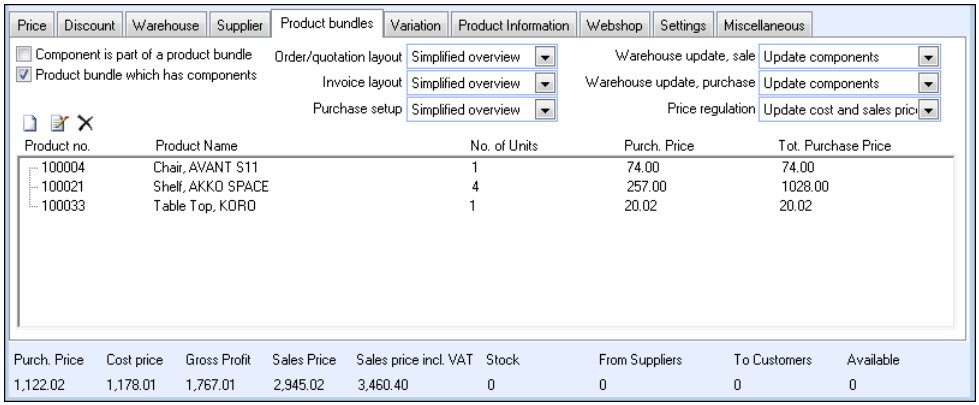
Product Bundles

If the company offers products consisting of several components, such a product can be defined as a **Product bundle**. One can, for example, envision a company that offers an office solution comprising two bookshelves, a chair and a desk. In this case, the whole product can be defined as one product bundle. The bookshelves, chair and desk are defined as components.

Tip! You can also use product bundles as templates. Just create a bundle for product combinations which you often use. You can then enter the bundle into the order and extract it, instead of adding each product one by one. In addition, you can use this functionality when different VAT handling on component level is required.

In this tab you select whether the product is the product bundle itself or whether it is a component that is included within a product bundle. Please note that services can also form part of product bundles.

Read more about how to create a product bundle in the section "Product Bundles" in the introduction manual "Financials, Logistics and Human Resources".



Component is part of a product bundle: Select this check-box, if the product is a component of a product bundle.

Product bundle which has components: Select this check-box, if the product is the product bundle itself. A list opens, from which you can select the single components for the product bundle. Only products with activated **Component is part of a product bundle** are shown in this list.

Order/quotation layout, **Invoice layout** and **Purchase setup**: Here you can specify the settings for how the product bundle should be displayed in sales, on invoices and in purchase orders. Choose **Do not show components**, if the single components shall not be included.

Warehouse update, sale and **Warehouse update purchase**: Choose **Update components**, if warehouse transactions will update the components of the product bundle. Choose **Update main product**, if you want the warehouse transaction to affect the product bundle itself. In this case you have to assemble the product bundle before you sell it.

Price regulation: Choose how the price regulation will work: **Update cost price** regulates the product bundle's cost price in relation to changes in the price for components. **Update cost price and sales price** adjusts the product bundle's sales price in relation to changes in the price for components.

New: Click here, if you want to add a new component to a product bundle.

Edit: Click here, if you want to edit the amount of a selected component.

Delete: Click here, if you want to delete a component from a bundle. You are not able to delete components in product bundles with stock in warehouse. If the product bundle is assembled, it must be disassembled before you are able to make changes.

Variation

If your company sells products that are delivered in several variations, for example in different colours or sizes, these can be registered as variations of a product. Each variation can have its own price, warehouse handling, product information, etc. This is managed through the Variation settings. It is important that you specify settings for variations before you create variations in the product register.

Each individual variation will have a specific product number. You can select whether or not to display the main product or the variation's product number when invoicing and making purchases.

Note! When a product contains different variations you are no longer able to enter transactions for the main product.

Default variation: Here, you can select which variation is to act as the default when a customer in the webshop selects to view detailed information about the product.

New: Creates a variation for the product.

Edit: This opens the variation card, which gives an overview of all product information for the variation of the main product. The variable fields will be editable according to the Variation settings. If they are not editable, they will appear grey to indicate that they cannot be changed.

Duplicate variation: Creates a new variation based on the variation product you highlighted in the list.

Variation matrix: This full functionality is only available if the main product is linked to at least one variation attribute, and if the setting for **Allow duplicate attributes** has not been selected within the section for Variation Settings of the main product.

Tip! There is no field for 'supplier's product number' within the variations. If your supplier uses version handling and needs a unique product number per variation, then you should be particularly careful when you enter the default supplier's product numbers as product numbers for the variations once they have been created.

Product Information

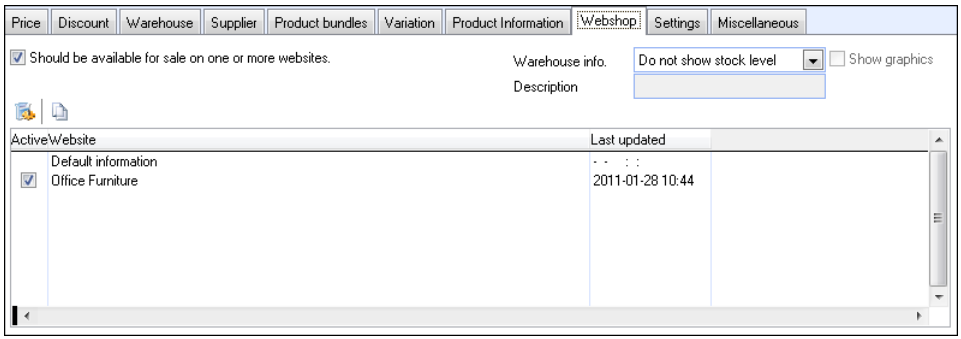
Under the **Product information** tab you can enter **Product information, Sales information, Technical information,** information about **Support** and **Production,** and **Other** information. The **Product information** tab consists of two notes fields that can be used as information fields for the product. You can enter several types of information, as described above, and view two types at the same time.

The information from this tab can be entered into sales orders at a later time. Enable this by checking the check box **Automatically transfer product information to product lines in sales order.**

Webshop

Your webshop is directly linked to the **Product register** through the **Webshop**. Here you select whether a product will be available for sale within your webshop and what product information will be displayed.

Read more about making a product available for sale in the webshop in the chapter "E-Commerce".



Product Information in the Webshop

Should be available for sale on one or more websites: If you wish to sell a product within your webshop you must check this box in order to make the product available within the **Items in your Webshop** list, under **Product Selection**.

Warehouse Information: From the **Warehouse Info.** drop-down list, you can select if you want to display the products' stock levels within the webshop or if you want to display other types of information. If you select "Description" from the drop-down list, you will be able to enter a description in the text field.

Description: If you select "Description" from the Warehouse Information drop-down list (see above), you will be able to enter your own warehouse information text in the field below.

Show graphics: Displays symbols in the webshop signifying different stock levels such as In stock, On order, Out of stock. You can select which symbols to use in the **Website Settings** in the **Settings Webshop** tab.

Tip! In the company settings for product, in the **Default Values** tab, you can define **Show graphics** as activated by default for all new products.

Website List

Default Information: At the top of the website list, default information is displayed. Default information is not a website; however it gives you the possibility of registering the product's default web settings. By clicking the button **Duplicate the webshop for product**, you are able to copy the webshop to other websites at a later point in time. This feature can be used if you wish to prepare your products for sale in the webshop prior to creating and editing the website.

Website Settings for Product: Opens the window **Website Settings for Product** window, where you are able to insert a product image as well as a product description. Read more in the chapter "E-Commerce".

Note! If you have a licence for several websites, you can vary the website settings for a product on the websites.

Duplicate the webshop for product: This button allows you to duplicate the website settings defined for a product and apply them to other websites, if applicable.

Active: Within the **Active** column, you are able to check the websites that the product will be available on. You can check the box when the website has been registered. If you want to delete a product from a webshop, un-check the relevant boxes within the **Active** column. You need to update the website in order to remove the product from the webshop.

Last updated: Displays the time of the last update for the webshop.

Website Settings for Product

Read more about website settings for product in the chapter "E-Commerce".

Settings

You can specify settings for the way each product is to be processed in relation to integration, purchasing, sales and warehouse. You can for example, specify that the product is a stock item, resource or service, and specify how the product should be expensed and which accounts should be used for stock value, product costs and sales income. If you track products, select the settings for this here.

Tip! You can change the values below for a selection of products simultaneously by using the tool **Updating a selection of products**.

Settings for processing products in other modules

Stock items: Warehouse transactions for purchases and sales are only registered for stock items. This field gives you the opportunity to define more sophisticated filters when printing reports and does not affect the way in which the product cost is posted. The settings for expensing product costs can be found in the **Warehouse** tab.

Resource: Resources can be linked to an **Activity**, e.g. meeting rooms, projectors and such.

Work/Services: If you have products that are forms of work or services you may select this option. This setting can be used for example for statistics.

Campaign product: If you have products that are campaign products you can select this option. This field is for your own information.

Commission: Select this option if you would like to calculate your salesmen's pay registration. If the item should not be included in commission calculations, you need to de-select it.

Settings for product tracking

The settings are only displayed if you have activated the functions serial number, consignment number and/or best before date in the company settings for the product module.

These settings affect warehouse transactions performed within the program.

Serial number: Select this option if you wish to make it mandatory to state a serial number for transactions into and out of the warehouse.

Consignment number: Select this option if you want to make a consignment number mandatory for transactions in and out of the warehouse.

Best before date: Select this option if you want to make it mandatory to state best before dates for transactions in and out of the warehouse.

Settings for posting

Here you can specify how a product's costs should be expensed. If you selected the **Individual rule for updating stock value in the accounts** option under the **Price Processing** tab of the company settings for product, you can choose to update your accounts at two different stages/with two different methods. This only applies to products that update their stock value (stock items).

You can select the accounts that apply to the product from the **Balance sheet account for stock value, Account for stock change** and **Cost account for product cost** drop-down lists. This can be of use if you would like these accounts to override the settings made on Control accounts level.

You can also specify the **Sales accounts** you want for the product here. If the fields are empty, default accounts will be used.

Tip! You can change the Sales accounts per **Product group** in the Properties register. To do so can make it easier to maintain the sales accounts for a product group as one. However, if you have entered a sales account directly on the product card, it will override all other settings.

Miscellaneous

In product register, under the **Miscellaneous** tab, you can register product information such as **EAN code**, **Commodity code** as well as **Project** and **Departments** that are relevant cost centres for accounting and trading with the product.

The industry's product number: This field can be used where the existing product number is the same within the industry. The field cannot replace the product number, but with a keyboard entry or an input on offer, order, invoice and purchase, you can enter the number instead of the normal product number. You can use up to 20 characters. You can have multiple occurrences of a similar industry product number. A list of the keyboard entries of the number in offer, order and invoice will be displayed. You can make the selection on industry number within the selection window for **Product list** and **Stock taking**, as well as within the **Advanced selection**.

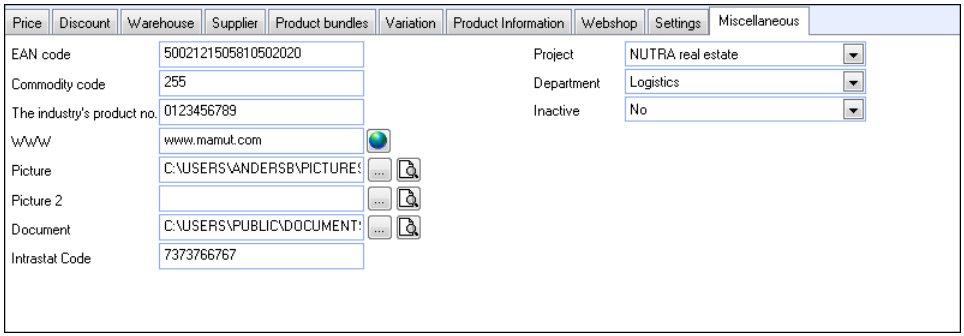
WWW: For access to additional information about a product, it is possible to refer to an Internet site. Enter the Internet address in the **WWW** field. Open the address in a browser by clicking the button to the right of the field.

Picture: You can insert a reference to a picture of a product. By clicking on the button with three dots, you can leaf through to the picture file.

Picture 2: Reference to an alternative picture, for example if you have one picture locally and one on a network resource.

Document: You can enter a reference to a document. By clicking on the button with three dots, you can leaf through to the document file.

Tip! If you are working in a multiuser environment, you should save images and documents to a file path which can be accessed by all users in the network, if you want other users to be able to access the files.



EAN code: Here you can enter the products bar code. Several standards such as EAN, UPC, ISSN and ISBN are supported. You will be informed as to whether the entry fulfils the standard criteria.

Intrastat Code: If the product is relevant for Intrastat reporting, enter the product's Intrastat code here.

Project: If you choose a project on a sales order before the products are entered, the superior project becomes applicable for all product lines.

Inactive: It is not possible to delete a product that has been used in other components of the system; however you can decide to set the product as inactive here. To do so, select **Yes**. If the product is a component in a product bundle, you can set it inactive and additionally select a replacement product for the related product bundles. A prerequisite however, is that product bundles with **Warehouse update, sales** set to **Update main product** must not have stock. Otherwise you would have to disassemble the product bundle.

Product Status

Product status provides an overview of the current and previous year's sales and purchases in numbers, as well as the total turnover. You can open this window by clicking the **Product status** button.

All figures are given in relation to budget (Sales budget), in addition to the current stock in terms of quantity and stock value. You also have access to all invoice lines and purchase orders that have been set up for the product, as well as a list of all customers and suppliers who have participated in the transactions. You can open these lists using the buttons at the bottom of the window.

Product Settings

User Settings for Product

Each individual user can modify the product register for individual use within User settings. The settings will only apply to the actual user.

The user settings can be accessed via **View** - **Settings** - **User** - **Settings per Module** - **Product**.

Default Setup

This tab allows you to modify the **Product register** for your own use. You can chose between three predefined setups.

Basic: Simplifies the screen and displays only mandatory fields.

Normal: Displays default fields and functionality.

Advanced: Displays all available fields and more functionality.

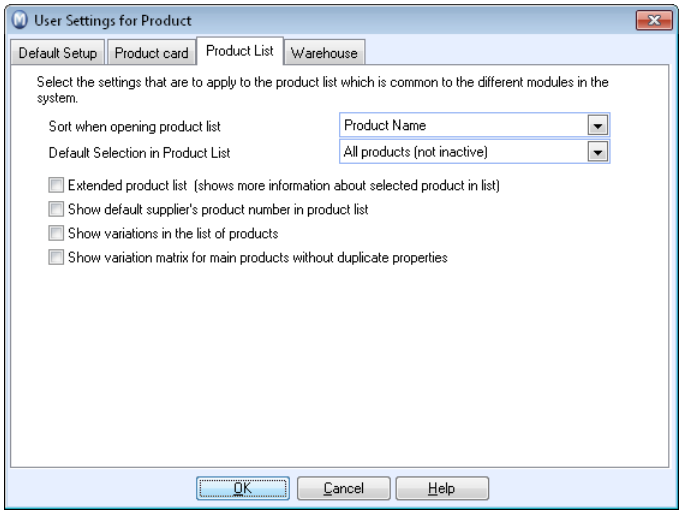
Click on the relevant button to choose the setup. In the **Product card** you will see the result of your selection.

Product card

This tab allows you to manually set precisely which fields and tabs you want to be displayed in the Product register. Note that the default setup changes these settings.

Product list

You can access the **Product list** from the Product register, Sales and Invoicing and Purchase modules. Here you can specify the settings you want regarding sorting and selection when the product list is opened. The settings will apply to all modules in which the product list is available.



Sorting when opening product list: Select whether the product list should be sorted by product number or product name.

Default selection in product list: State the product selection you want displayed by default when the product list is opened.

Extended product list: Select this if you want information about the product's price, stock, gross profit (GP), gross margin (GM), etc.

Show default supplier's product number in product list: Select this is if you want to see the default supplier's product number in addition to your own product number in the product list.

Show variations in the list of products: This selection shows all variations of a product and not just the main products within the product list. You must activate the variation matrix in order to select the variations in Sales/Purchasing and sales orders.

Show variation matrix for main products without duplicate properties: This option opens a screen when entering the product with variations. The variation matrix gives you an overview of available product variations, warehouse status, stock etc.

Warehouse

The tab is only available if you have defined that your company keeps products in stock, within the product company settings.

Default warehouse: If you maintain several warehouses you can define which one should be the default for your user. When creating new stock products, the default warehouse will be suggested automatically.

When you enter products into a quotation, order or purchase; the program will check if the products are linked to your default warehouse. If they are not linked to the default warehouse, you will be asked if you still want to use the products.

Tip! You can choose not to display the above-mentioned prompt again when executing the specific action. This setting is discarded the next time you close the active window - the quotation, order/invoice or purchase windows.

Default Stock location: Only available if you have defined that the company uses the stock location in the product user settings. Choose between the available locations registered under the current **Default warehouse**.

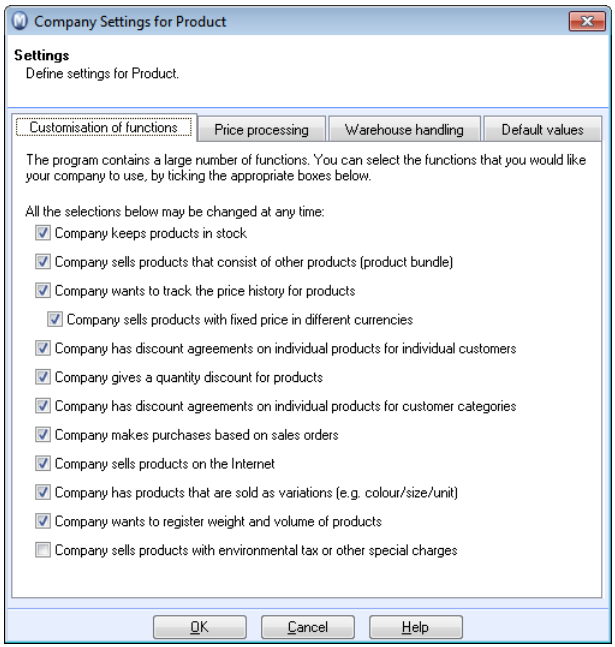
Note! If you have selected a **Default Stock location** which is not associated with the product, it will be deselected.

Company Settings for Product

In the company settings for product, you are able to define the settings for the functions your company wants to use, as well as manage price processing and warehouse handling.

The company settings can be accessed via **View - Settings - Company - Settings per Module - Product**.

Customisation of Functions



Here you specify which functions will be available to your company. The modification provides the product register with a better overview and is tailored for your use.

Company keeps products in stock: Select this if you want to use the warehouse function in the product register.

Company sells products that consist of other products (product bundle): Select this if you want to use product bundles.

Company wants to track the price history for products: With this function the Price in the product register will display historic prices. You can register prices on your products for a certain time period, e.g. for a sales campaign.

Company sells products with fixed prices in different currencies: This function gives you the possibility to create fixed product sales prices in different currencies. These sales prices are set individually for a special product and are independent from the exchange rate defined in the Currency Register. This function is only available if the setting **Company wants to track the price history for products** has also been activated.

Company has discount agreements on individual products for individual customers: Select this if you want to be able to give your customers individual discounts on individual products. By checking this box, the **Contact** tab in the **Discount** tab, within the product register is activated. You can override the setting for each individual product by selecting **No individual discounts for product**.

Company gives a quantity discount for products: Must be selected in order to specify quantity discounts for your products. Checking the box activates the **Quantity** tab, within the **Discount** tab in the product register.

Company has discount agreements on individual products for customer categories: Select this if you want to be able to give specific customer categories discounts on individual products. Checking the box activates the **Category** tab in the **Discount** tab in the product register.

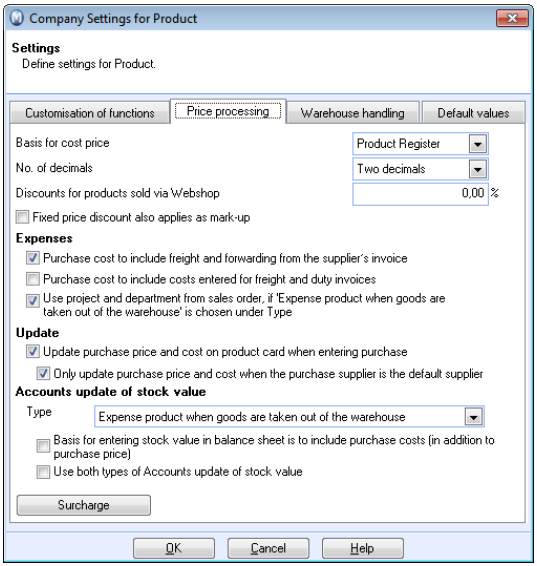
Company makes purchase based on sales order: Select this if you want to be able to create purchases of products from sales orders.

Company sells products on the Internet: Select this if you want to be able to sell your products on the Internet.

Company has products that are sold as variations (e.g. colour/size/unit): Select this if you sell product variants.

Company wants to register weight and volume of products: Select this if these are values you want to register for your products.

Price Processing



Basis for cost price: Here you can define the basis for calculation of cost price when creating a quotatic

- Product Register: Select this option if you want to base the sales and invoicing cost price on the Cost Price field in the product register.
- Purchase Price: Select this option if you want the system to base the sales and invoicing cost price on actual, registered stock movements. If there are no registered stock movements, the data will be fetched from non-delivered purchases. If there are no non-delivered purchases available, the data will be fetched from the **Purchase Price** field in the **Price** tab in the product register.

  If you select **Purchase Price**, the option **The cost price should include 'Expenses' from the Product card in addition to the Purchase Price** will be activated in the **Price/Discount** tab in the company settings for **Sales/Invoicing**. Here you can define if you want the calculated cost to include the **Expenses** field in the product card.

No. of decimals: Select whether product prices should have 2 or 4 decimals. The choice you make will affect the product card, the price calculator, the discount tab and the "Supplier" tab in the product register.

Discount for products via the Webshop: If you want to give a general discount on products ordered in the Webshop, enter the discount percent here.

Fixed price discount also applies as mark-up: The setting applies if you are using **Fixed price** for products in the **Discount** tab in the product register. The system will, by default, suggest the lowest price of the **Fixed price** in the discount register and **Sales price** in the price calculator. If you select this option, **Fixed price** will be used even if the fixed price is higher than the **Sales price**, and will therefore act as a mark-up.

EXPENSES:

Purchase cost to include freight and forwarding from the suppliers invoice: Select whether freight and forwarding costs should be included in the purchase cost.

Purchase cost to include costs entered for freight and duty invoices: Select whether duty and forwarding should be included in the purchase cost.

Use project and department from sales order, if 'Expense product when goods are taken out of the warehouse' is chosen under Type: If your company expenses products when goods are taken out of the warehouse, you can define that the project and/or department from the sales order will be used for the journal entry. If this setting is not activated, the project and department from the purchase order will be used.

UPDATE:

Update purchase price and cost on product card when entering purchase: This will be updated if you change the prices on the product lines in the window for Receive/Return.

Only update the products for which the purchase supplier is the default supplier: Select this if you do not want the setting to apply to suppliers other than the default supplier.

ACCOUNTS UPDATE OF STOCK VALUE:

Expense on purchase: If you select this alternative stock changes will not lead to automatic journal entry. The product cost will be posted when you post the supplier invoice from the purchase.

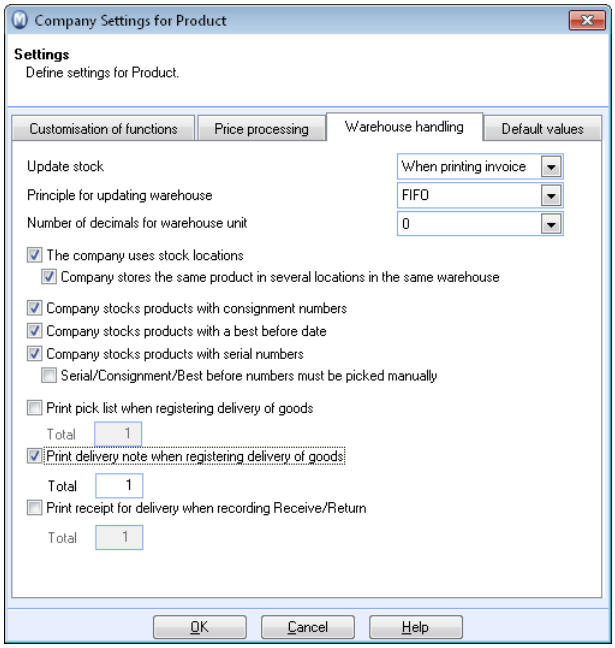
Expense product when goods are taken out of the warehouse: Posting for all products will take place at the time of sale. Other stock movements will be posted so that the amount in stock changes.

Individual rule for updating stock value in the accounts: If you select this alternative you will be shown a setting in the Product register under the Settings tab, which allows you to decide per product, whether its stock value should be posted and updated, or whether it should be accounted for at the time of posting the supplier invoice.

Basis for entering stock value in balance sheet: Select this if you want the purchase price on the sales order line to include purchase costs when entering the stock value for products within the balance sheet. This will appear in the stock value report and within the Warehouse module.

Use both types of Accounts update of stock value: Select whether adjustments should be displayed in both the profit and loss and balance accounts. Two extra journal lines will be posted on the receipt and delivery of goods.

Warehouse handling



Update stock: Choose whether warehouse updates should occur through printing of an invoice, packing list or pick list.

Principle of updating warehouse: Specify whether you want to use FIFO (First In First Out) or LIFO (Last In First Out) here. Please note that products with expiry dates are picked in relation to date. The earliest date is picked first, regardless of the warehouse handling method.

Number of decimals for warehouse unit: You can display stock with up to 3 decimals if you wish to. Selecting several decimals here will also allow you to sell products that are less than an entire unit via the webshop. To activate this feature for a product, you must select this in the **Webshop** tab in the product card.

Company stores the same product in several locations in the same warehouse: Select this if you have warehouses with several locations and want to enter these in the program. You should also select this if Company stores the same product in several locations within the same warehouse.

The company stocks products with consignment numbers: Select this if you want to be able to set whether products require consignment numbers for product transactions. This setting will then be available under the Settings tab for the product.

The company stocks products with a best before date: Select this is you want to be able to set whether a best before date is required for product transactions. This setting will then be available under the Settings tab for the product.

The company stocks products with serial numbers: Select this if you want to be able to set whether a serial number is required for product transactions. This setting will then be available under the Settings tab for the product.

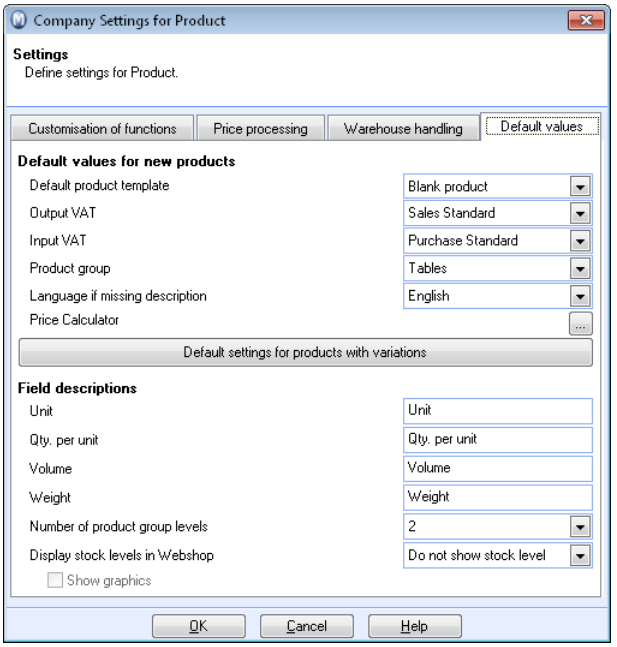
Serial number must be picked manually: Select this if you want to be able to select a serial number for outgoing product transactions.

Print pick list when registering delivery of goods: Select this if you want a pick list to be printed out when registering delivery of goods. You can also specify the number of printouts you want.

Print delivery note when registering delivery of goods: This selection means that a delivery note is printed out when registering Receive/Return. At negative Receive/Return/crediting purchases a Return note is printed.

Print receipt for delivery when recording Receive/Return: A receipt of delivery is printed on Receive/Return. For negative Receive/Return/Crediting a purchase a return note is printed.

Default values



Here you can enter the default values you want to be automatically assigned to new products created. If you want to change the labels of any of the fields in the product register you can do so here.

Default product template: Click the button in order to define what type of product should be created by default when registering new products in the product register.

Output and Input VAT: Here you specify the default VAT rates for the new products being created. This can be overridden on the product card.

Language if missing description: If you are going to enter the product name in several languages you can set the default language if new products are missing descriptions.

The Price calculator: Is used when you want to calculate the sales price for a product. The default values determine how the price calculator will update the various price fields.

Standard settings for products with variations: These settings generally apply to all products that have variations. This will considerably simplify the process of creating a new main product with variations, especially if you have many different products that are being sold with the same variation properties. You can override the default settings for every main product under **Variation settings** in the **Variations** tab. Read more about product variations in the introduction manual "Financials, Logistics and Human Resources".

Field descriptions: The field descriptions can be modified for the products you sell and are common to the entire product register. You can change the field names for Unit, Qty. per unit, Volume and Weight.

Number of product group levels: Here you define the number of product group levels. You can adjust from 1 - 4.

Display stock levels in webshop: The stock levels can be displayed according to different principles in the webshop. You can also **Show graphics** which represents stock levels. Read more about this in the chapter "E-Commerce".

Organising and Managing Products

Generally, it may prove beneficial to separate products into the divisions the system requires in terms of whether a product is a stock item, product bundle, work/service or none of these.

This segmentation is often used very differently from company to company. To divide products, you can use the Product category, Product group and any connected Sub-groups.

The Product category and product group are set up and edited in the Properties register. You can find this register by going to **View - Settings - Company - Properties register**.

Change in the Properties register! You can right-click the field containing the alternatives for selection extracted from the Properties register. This will bring up the option **Change in properties register** and will open the Properties register so that you can edit or add alternatives directly into the register.
Example: In the Order registration window under the **Text** tab. Right-click into the field beside **Select text** and click on **Change in properties register**.

Product category

You can select a product category for the product, from the drop-down list in the upper part of the product card. The product category is often used for a basic segmentation. For example a business selling plumbing services, might set up categories for hours, materials, travel time, sub-contractors and more.

The division into product categories has no effect on the Accounting module.

When printing a report, you can also create a filter for product category if required. You cannot assign discounts per product category but you can adjust prices for an entire category in one, possibly combined with other criteria. This is done with the help of the **Price adjustment** function.

Product categories are set up and edited in the Properties register. You can access this by going to **View - Settings - Company settings - Properties register**.

Product group

You can select a product group for the product, from the drop-down in the top-right of the upper part of the product card.

Product groups may be used according to a company's needs for a more detailed segmentation of their products. A company selling plumbing services, for example, might want to further segment their product category 'hours' into preliminary planning, completed work, travel time and more.

Dividing products by product group can have an effect on the Accounting module if you so wish. A product group can be directed to a specific sales account in the ledger, for example.

When printing a report, you can create a filter for product group when required, and you can also combine the filter with other criteria. It is possible to offer your customers different discounts based on the different product groups. You can also adjust prices for an entire product group in one, possibly combined with other criteria. This is done with the help of the **Price adjustment** function.

In the company settings for **Product** you can decide which product group should be displayed as the default entry in the product card when creating a new product, if this is helpful to you.

Sub-group

A product group can have several sub-groups. These, too, can be set up in the Properties register. Each product group can be edited so that you are able to add sub-groups to them.

The module settings for Product allow you to decide how many product group levels you would like to use. The maximum number of levels available is 4. If selecting the maximum, the product card would then display a field for product group as well as three sub-group fields.

Sub-groups have no effect on accounting processes. It is only for the top level (product group) that you can assign the sales accounts for product groups.

You cannot assign discounts per sub-group either. However, you can create a filter for the sub-group so that you are for example able to change the price for all products in a specific sub-group with the help of the **Price adjustment** function.

How to set up a sub-group

1. Open the **Properties register**, for example by right-clicking into the **Product group** field in the product card and choosing **Change in properties register.**
2. Highlight the product group you want to create a sub-group for.
3. Click **Edit**.
4. Activate (click into) the big field in the window and click **Edit**.
5. Enter a name for the sub-group in the smaller text box up top.
6. Click on **Previous**. Check that the sub-group has been added to the larger bottom window.
7. Click **Previous** and **OK**.

The sub-group is now available for selection.

If you would like to add more sub-groups you can do so directly after step 6 in the instructions above.

If you would like to add a sub-group to a sub-group you can do so by clicking on **New** under step 5 in the instructions above.

Maintenance

The routine for **Updating a Selection of Products** is a tool that simplifies the job of changing the same values for several products in the product register at once. This tool lets you do the job a lot quicker without the need for going through the entire product register manually.

If you would like to duplicate/copy a product you can easily do so by clicking on the **Duplicate** button in the toolbar.

To ensure your products are listed with the most current price, you can make use of the **Price adjustment** routine for adjusting the **Sales price, Purchase price**, **Expenses** and **Gross Profit** for several products at once. First, you create a filter and then you select which prices should be adjusted for the filter results.

A product that is no longer in use cannot be deleted if it has been included in any transactions. However, you can set it to the inactive status, which will exclude it from further activity.

Updating a Selection of Products

The **Updating a Selection of Products** function, acts as a wizard for simplifying the job of changing values in the product register. With this tool you can perform the job faster without having to go through the entire product register manually.

The wizard will help you to specify which fields are going to be changed and which products the changes will apply to.

To activate the wizard, go to **View - Product - Updating a Selection of Products**.

Tip! In help (F1), you can find more information about the wizard.

Duplicating a Product

If you wish to duplicate a product, you have the option of doing this by clicking the **Duplicate product** button. A new window suggesting a new product number then appears. You can override this product number. If you select a number that is already in use, you will be informed of this.

Note! If you have an active **Filter** in the Product overview when the product is duplicated, then the selection will be deactivated when you return to the product overview after saving the new product.

Editing Product Numbers

It is not possible to edit product numbers for those products that are already created and in use within Mamut Business Software.

However, when creating new products you are able to override the suggested product number.

Most product fields can be edited after they are created. You can also use the Updating a selection of products wizard to quickly and efficiently change values for several products at a time.

Product Data Import

In Mamut you can import products and update prices on existing products by using the import of product data function. You can import product and price lists from your suppliers or create your own lists in Microsoft excel that you import. Import of products will be time saving compared to entering all the products manually into the product register.

To import product data you will have to click **New** and create a new import routine. In Import settings you define how the file is created, what will be updated and rules for new products.

When you have selected import settings, you click **Start Import** to begin reading products/prices in the file you selected to import. An overview of Import read products will be displayed for you to import.

Remember that the file you are importing must be closed, if not it will not import.

Tip! Always perform backup before importing data. If importing does not go according to plan, you can easily back copy the backup to the starting point you were before you imported the data.

Surcharges (additional taxes)

By using surcharges, you can add fixed fees to products which are required to include an additional tax. The fees can be calculated using different methods, for instance, per unit price, unit volume, or the percentage of different prices. The settings can be found in the company settings for products. The surcharge will be posted to a separate account.

The surcharge is included as a part of the price of the product. If you, for example, want to calculate a product surcharge of £15, the amount must be included in the sales price.

Note! Some surcharges are calculated in addition to the product price. For these types of surcharges, you can create a separate product and calculate the surcharge on the actual order. Make sure that the product is linked to the correct sales account. You can create a surcharge of 100% of the sales price for this product, so that the accounting functionality is identical to the information below.

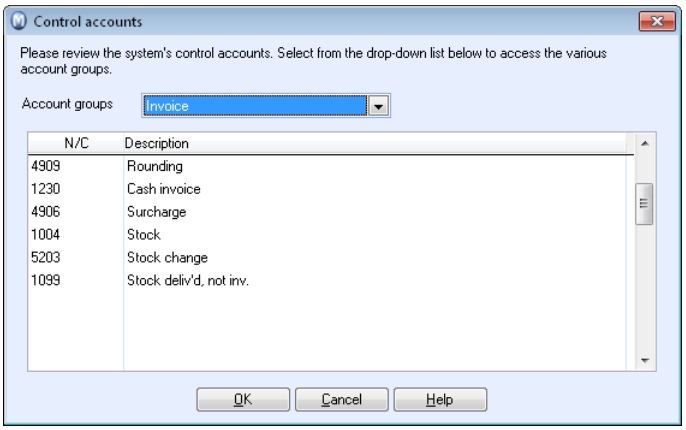
Invoice

The sum of the surcharge is specified on the invoice.

In order to add a surcharge to an order which has already been created, check the **Surcharge** box on the invoice, in the **Miscellaneous** tab.

Accounting

When invoicing, all surcharges will be transferred to the nominal ledger. To which account the charge is posted depends on the settings you have defined in the accounting settings: **View - Settings - Accounting - Accounting Settings - Control Accounts**. By selecting **Invoice** from the **Account group** drop-down list, you will be able to see to which account the surcharge will be posted. Usually, account 4906 is used for surcharges. You can change the account here.



Report

The report **Turnover per product** displays the turnover of one specific product with a surcharge during one period.

Click **New** in the **Advanced** tab in the report wizard. Expand the category **Product**, highlight **Surcharge** and click **Next**. In the **Value** drop-down list, select surcharge group. Click **OK**. In the filter window, in the **Order** tab, in the sub-tab **Date/Amount**, you can also define invoice dates in order to limit the report to one specific period.

Getting Started With Surcharges

How to Get Started With Surcharges

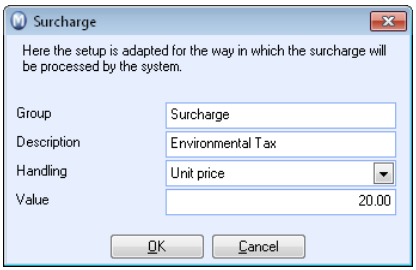
1. Activate the surcharge feature by going to **View - Settings - Company - Settings per Module - Product - Customisation of functions** and checking the option the **Company sells products with environmental tax or other special charges**.
2. Choose if you want to associate new customers with surcharges automatically. This option can be found under the company settings for contact management, by clicking the **Advanced** button.
3. Add or edit surcharge groups in the company settings for products, in the **Price Processing** tab, by clicking **Surcharges**.
4. Activate the surcharge feature for existing customers by navigating to the **Settings** tab in the contact card and clicking the **Customer** button. Select **Yes** from the **Surcharge** drop-down list. You can also use the wizard **Change values for a selection of contacts** to activate the feature for all or a selection of existing contacts. Remember to create a backup copy first.
5. Associate the products with surcharges via the **Surcharge** drop-down list in the **Price** tab.

   The surcharges will now be specified on invoices to customers associated with surcharges, and if the invoice includes products with surcharges.

How to Register a Surcharge/Additional Tax

How to register a Surcharge/Additional tax

1. Go to **View - Settings - Company - Settings per Module - Product - Price processing** and click on the **Surcharge** button.
2. Click the **New** button to add an additional tax or select a line and click **Edit** to change the settings for additional taxes.



3. Enter the tax code in the **Group** field.
4. Enter a **Description** of the tax if you wish.
5. Decide which processing rule to apply to the tax, from the **Processing** drop-down list.
6. Enter the Value that will be linked to the Processing value. If you for example selected **% of cost price** as the processing value, you might select **0.10** under **Value** to indicate that the Additional tax will be 10 per cent.
7. Click **OK**.

The additional tax has been added and can now be used.

Product Variations

A product can be sold in different variations of the same product, for example in different colours and sizes. When a product has variations, the product from which the variations are created is called the **main product**. To simplify the administration of product variations, you can register a main product and then create variations from it. This way it will be easier to purchase products from your suppliers, decide on the differing information per variation, receive help with building product names automatically and enter orders with different variations of a product. Each variation can have its own price, warehouse handling, product information, etc. This is controlled by the variation settings; therefore it is important that you specify variation settings before you create variations in the Product Register.

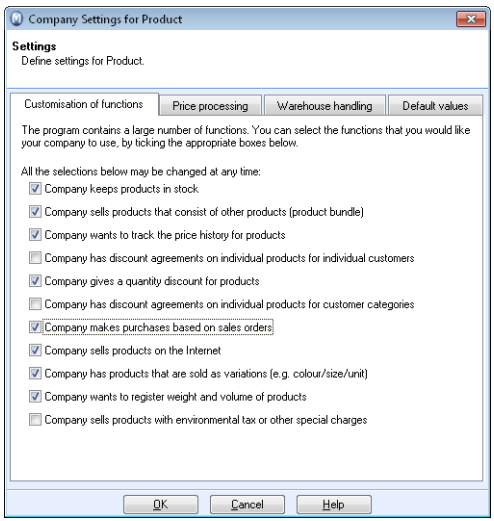
In addition, it is also possible to sell products with variations in the webshop.

Note! A main product with variations cannot be used as an independent product.

Note! To make use of this functionality, you need to have purchased a licence in some program version.

How to start using variations

In order to activate product variations you need to have a program version with a licence that includes this feature. Furthermore, you need to activate the appropriate setting; **Company has products that are sold as variations (e.g. colour/size/unit).** This setting can be activated from the **Customisation of functions** tab in the **Company Settings for Product.**



To simplify creating product variations, you can also select **Default settings for products with variations** under the **Default values** tab in the Company Settings for Product. This

setting will be the default that will apply to all new products. A variation can have up to two different variation attributes. Variation attributes can include colour and size, for instance. Variation attributes are defined from the Properties Register. You can assign the different variation values for the attributes through the Properties Register.

Examples for variation attribute and value

Variation attribute:	Variation value:
Colour	Blue
Colour	Red
Colour	Green
Colour	Yellow
Colour	White

Read more about how to add attributes and values for variations in the Properties Register below.

Once you have specified the general settings for products with variations, you can create the product that will be the main product for the variations. You can also create variations for an existing product, but note that if you do so, this product will no longer be available as a separate product, only its variations. After you have registered all the product information that will apply to all the variations on the main product card, tick the box **Product has variations** which can be found in the **Variation** tab in the Product Register.

The **Variation settings** under the **Variation** tab allow you to establish which values will differ for the product variations. You can also decide how the product name for the variations will be created, making it easier for you to create a uniform product register.

Other settings

Additional settings that you are able to define include the option to **show variations in the list of products.** You can define this setting under the **User Settings for Product - Product List** tab by ticking the box for **Show variations in the list of products**. You can also use the drop-down list in the product list as a filter (for many this will make the product list very long and therefore the setting is not activated as default). You can see the variations at the bottom of the product list window, where you will also find a drop-down list that will show all linked variations.

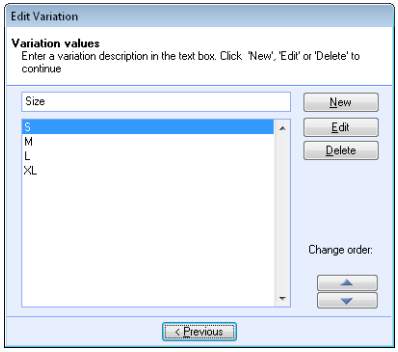
Tip! You can edit previously created products by using the Wizard for product changes which can be found under **View** - **Product** - **Updating a Selection of Products**. You can change the **variation attributes** and product name creation via the **Variation** tab. In addition, you are also able to change stock and location for variation products which vary in the warehouse.

Variation Attributes and Values

The different variation attributes are defined in the **Properties Register**. Variation attributes could for example be colour and size. Each attribute may have different **Variation values** that you are able to define.

You can access the Properties Register by clicking **View** - **Settings** - **Company** - **Properties Register**.

You can create a variation attribute by selecting **Variation attribute** in the Properties Register and clicking the **Edit** button. Click **New** and enter the name of the variation attribute in the top field. You can also create the different variation values that will apply to the variation attribute by clicking the **New** button in the **Edit variation** screen. Enter the variation value and then click **Previous**. Repeat for each new variation value you wish to create for the attribute. Click **Previous** when all values have been created.



If you want to add new variation values later, you can open the variation attribute in the Properties Register and click **Edit**.

Note! The arrows under **Change order** in the **Edit variation** screen decides the order of the variation attributes and the way that they will displayed in the webshop. This way you can ensure that the variation values are shown in a logical way e.g.: **XS - S - M - L - XL - XXL**, and not alphabetically or in the order they were created.

Limits to the number of variation attributes

The different variation attributes are sorted according to the **Properties Register**. Products cannot have more than two variation attributes. If you want more attributes, i.e. sizes, colours and shapes, you will have to create a separate product for one of them.

For a T-shirt this could be:

The T-shirt has the variation attribute for shape (Female/Male), sizes and colours. You can create two (2) products: T-shirt female and T-shirt male. Each with variation attributes size and colour.

Variation Settings

Variations can, to a certain degree, differ from the main product. Through **Variation settings** you specify which settings will vary. Access this window by clicking **View** - **Product** - **Product Register** - **Variation tab** and then select the **Variation settings** button. The product information that does not vary will be retrieved from the main product's product card.

Tip! In Company settings for Product in the **Default values** tab you can set **Default settings for products with variations**. The setting will be the default that will apply to all new products. This will simplify the process in creating new main products with product variations considerably, particularly if you have many products with the same variation attribute. Default settings can be overridden at product level through the **Variation** tab under **Variation settings**. These settings will not apply to existing products.

Default Settings retrieves the default settings that are defined in the Company Settings for Product. This might be helpful if, for example, you made changes to the default settings after a product had been created and you now wish to apply the default settings to that product.

Information that varies for each variation

The **Variation Settings** window allows you to select the information that will differ for each variation. This could often just be warehouse information such as current stock and EAN-code. It is also possible to have individual prices for each variation. You edit the information through the **Variation** tab in the Product Register or in the **Variation matrix**.

Prices: Select this if the variation price differs from the price of the main product.

Stock: Select this if current stock is individual to each of the variations.

Note! If the product shall vary in price, but not in stock, the stock value list report will not be able to show the value of the product. However, you can view the stock value by printing the report **Stock value list (stock movements)**, or the **Stock List** reports.

Unit: Select this to set another unit for the variation that differs from the main product.

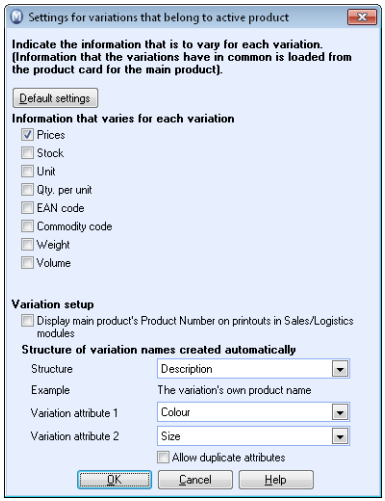
Qty. per unit: Select this to edit the quantity per unit that differs from the main product.

EAN code: Select this in order to enter an EAN code that differs from the main product.

Commodity code: Select this to enter a commodity code that differs from the main product.

Weight: Select this in order to enter another weight for the variation that differs from the main product.

Volume: Select this to enter a volume that differs from the main product.



Variation setup

Display main product's Product Number on printouts in Sales/Logistics modules: Tick this to make use of the main product's product number on printouts for selling and purchasing the product. If this is not selected, the variation's product number will be used.

Structure of variation names created automatically

When you create variations for a main product, the variations are linked to the main product and are treated as sub products; but these will be individual products for your customers. Depending on how you create variation attributes, it could be necessary to build product variation names. The settings simplify this process so you do not have to enter a detailed product name for each variation. The process is automated according to the setting.

The **Structure** drop-down list allows you to set how the name will be structured. **Variation attributes** refer to the attributes defined in the Properties Register, e.g. **Colour**, while **variation value** refers to the different values that can apply to each attribute, e.g. **Green**.

In the line **Example** below the drop-down list, you will see an example of how the product name will look for your selected structure.

Variation attributes

Variation attribute 1 and variation attribute 2: You can define up to two fixed attributes for the variations of your product. Select from the drop-down list the attributes that will apply for the variation. The attributes (e.g. Colour) and the different values (e.g. red, green, yellow) are defined in the Properties Register.

Tip! You can easily access the Properties Register by right-clicking on the variation attribute list.

Allow duplicate attributes: Select this if you want several variations of a main product to have identical attribute values. The box will be ticked if you have already created variations with duplicate values, and you cannot remove the tick before this is corrected.

How to create a Variation of a Product

Follow this procedure to create single variations. To create and edit several variations of a product, use the **Variation matrix** button. Read more about how to create variations through the Variation Matrix below.

Before you create variations you should set the **Default settings for products with variations** under the **Default Values** tab for the Company Settings for Product.

How to create variations

1. Click **View** - **Product** - **Product Register** and select an existing product you want to create a variation for or create a new product.
2. Select the **Variation** tab in the product card.
3. Select the **Product has variations** check box.
4. Make changes to the **Variation settings** if required and click **OK**. If you are creating a new product, the proposed settings are taken from the Company Settings.
5. Click **New**.
6. Enter the **Product name** if it is not predefined by the Variation names created automatically setting. Read more about this setting above.
   If the product name displays **(none)**, it is because you have not specified the values for the attributes on the variation card.
7. Enter the product information that applies to the variation. You can override the suggested product number.
8. Select whether the variation is to be included as a component in a product bundle or whether the variation should be set as inactive and whether the product will be available for sale on one or more websites.
9. Enter specific information about the variation in the **Price**, **Warehouse handling** and **Product information** tabs.
10. Click **OK**.
11. Repeat the procedure for creating a variation until you have registered all variations of the product.
    If you want to create several variations with similar information, use the **Duplicate variation** button located under the **Variation** tab toolbar.

You have now successfully created variations of a product.

Find out more about the **Variation** tab in the Product Register section.

How to create and edit all Variations/Variation Links for a Product

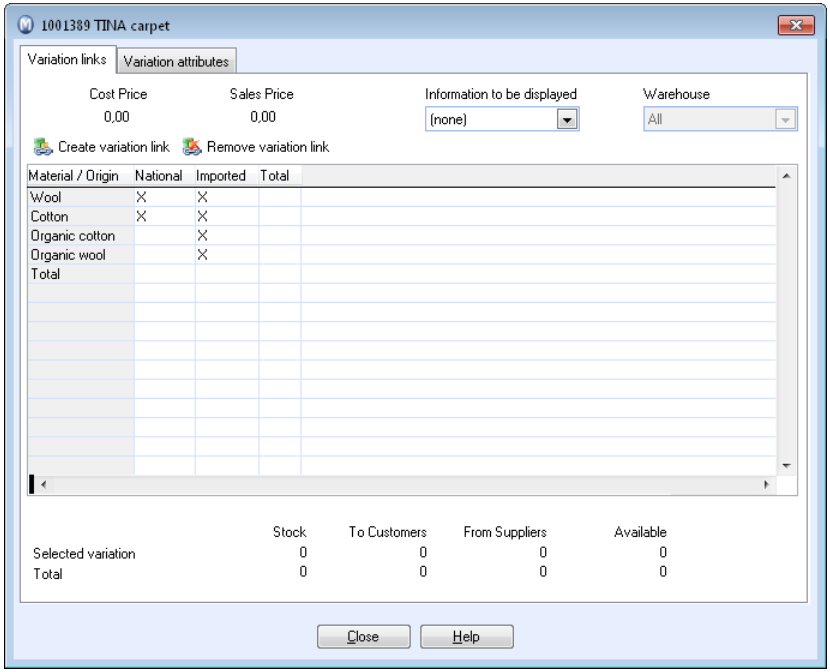
A product that will be sold in different variations requires a link to the main product. You can link variations to the main product through the **Variation matrix**.

Via the **Create variation links** and **Remove variation links** buttons you can create several variation links for the product or remove previously created links.

Note! This procedure presumes that you have created variation attributes, and that you did not select that duplicate variation attributes are allowed in Variation settings for the main product. Alternatively, you may create variations by clicking on **New** in the **Variation** tab of the main product's Product card.

How to create a variation link

1. Go to **View** - **Product** - **Product Register** and open the product you want to create variations for.
2. Click the **Variation matrix** button located on the **Variation** tab toolbar.
3. In the **Variation links** tab, highlight a cell in the matrix and click **Create variation links**. A cross will appear for each variation attribute being created.



4. Once you are finished, click **Close** to exit the window.

   The new variations links will appear in the list under the Variation tab. Check that the product variations have received the correct name. You can edit them by double-clicking them.

   You can remove a variation link by selecting it in the matrix and clicking **Remove variation link**.

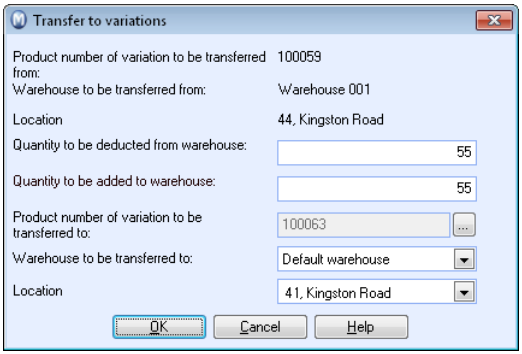
   Note! The fields available for variation are controlled by the **Variation Settings** of the main product. Price information etc. can be edited in the **Variation** tab in the Product Register.

Transferring Stock between Variations

You can transfer stock from one variation to another. To be able to transfer between variations, the check box **Stock** has to be ticked in **Variation settings** under the **Variation** tab in the Product Register.

How to transfer stock between variations

1. Go to **View - Warehouse - Warehouse - Stock**.
2. Select the variation from which you wish to transfer stock.
3. Click **Transfer to another variation**.



4. Under **Quantity to be deducted from warehouse** enter the quantity to be withdrawn from stock for the variation from which you are transferring.
5. Under **Quantity to be added to warehouse** enter the quantity of the variation that should be added to the stock of the new variation. This will normally be the same as the quantity as withdrawn, but may differ if the variations have different unit descriptions.
6. Enter or browse to find the product number for the variation to which you are transferring.

7. Select the warehouse to which you wish to transfer the stock. If this warehouse is not linked to the product, you will be asked whether you want to create a link.
8. Select the warehouse location to which you are transferring. This selection only appears if you have selected **Company stores the same product in several locations in the same warehouse** in the company settings.
9. Click **OK**.

   The stock has now been transferred between variations.

Variations in the Webshop

Note! Product variations require a licence for additional products in some program versions.

If you have a website with a webshop, you can sell your variation products in your webshop.

Enabling variations for sale in the webshop

1. Go to **View - Product - Product Register** and find the main product of the variation you wish to sell on your webshop.
2. Open the **Variation** tab, highlight the variation you want to sell in your webshop and click **Edit**.
3. In the window that opens, tick the box **Should be available for sale on one or more websites**.
4. Click **OK** to close the window.
5. Repeat the above steps for other variations of the main product you wish to enable for sale within your webshop.
6. Open the **Webshop** tab and tick **Should be available for sale on one or more websites** and in the **Active** column tick the website or websites the product is going to be available on.
7. Click **Save** on the main product's product card.

   The variation(s) are now enabled for sale in your webshop.

Tip! Through the **Variation** tab in the product card you select which **Default variation** will show when customers decide to view detailed product information in the webshop.

For the changes to take effect in your webshop, you will need to update your website and webshop

1. Go to **View - E-Commerce - Edit Website** and under the tab **Menu** select **Items in your Webshop**.
2. Ensure that the main product, for which you want to sell variations, is included in the list of products to be sold online.
3. Click **Close** to exit the window.
4. Go to **View - E-Commerce - Update Website** to upload the changes to your webshop.

   The variations are now available for sale in your webshop.

Tip! If you would like to indicate that a product has variations in the webshop product list, you can go to **View** - **E-Commerce** - **Website Settings - Settings Webshop - Other** tab and tick the box **For products with variations: View link to selection of variation in product list. Example: 'Select properties'**.

Chapter 3:
Sales Follow-up

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Prices and Discounts 202

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Program Versions without Accounting Functionality 219

The functionality described in this chapter may be either partly or fully available within your program version. You will find a detailed overview of all of the functionality included in all Mamut products on our website at www.mamut.com/uk/functionality.

If you are unable to find the answer you are after within this chapter, you can refer to the More Information chapter where you will find tips on how you can get further help.
If you wish to order or receive more information regarding Mamut products, you can contact our sales department at sales@mamut.co.uk or by phone on 0207 153 0900.

Quotations

The **Quotation** module is an efficient module designed to create quotations for single customers, or to create larger quotations for campaigns etc, that can automatically be sent to a selection of your registered customers. If the quotations generate sales, you can easily transfer them to the Sales/Invoicing module and follow them through to invoicing and delivery.

Quotation and Repeating Quotation

You can create quotations for a single contact, a **Repeating quotation** for a single contact as well as individual quotations and repeating quotations for a selection of contacts (group quotation). You can also create a Quotation template that can be used as a starting point for group dispatches.

Flexible Printouts and Quotations via E-mail

The quote can be sent to the printer, e-mail or fax, be transferred to Microsoft Office Word or to the Print Preview screen. If you have installed a PDF printer you are able to transfer the quotation to the PDF format as a file.

Create Follow-up Activities for You and Your Colleagues

By clicking on the arrow to the right of the **Create Activities** button you can create customised activities. For these, you decide on the content for the activity and also which modules the activity template should be available in.

Create Advanced Quotations by Using Microsoft Word

If the quotation is transferred to Microsoft word you can edit it by clicking the **Advanced quotation printouts** button. This list gives you easy access to the documents in the document list that are linked to the quotation.

Easy and Efficient Transfer of Quotations

Once a quote has been accepted you can easily transfer the quotation to order by using the **Transfer** button. The system will create an order for you, saving you having to enter the information again. In the company settings, you can choose to create a PDF copy of the quotation documents which can be linked to the order which is created and can be viewed from there.

Status

The quotation is moved between various sub-registers depending on further processing. You can move between the sub-registers by using the drop-down list in the top right corner.

The drop-down list consists of **Quotation cancelled, Lost sale, Quotation, Quotation repeating, Quotation template** and **Group quotation**.

Read more about how to use the drop-down list in the chapter "Getting to know the Program" in the introduction manual "Settings, Reports and Filters".

Integration with Other Modules

Quotations are integrated with other modules in order for quotations to be picked up, created and edited as a natural part of the working process. Quotation tabs can be found under **Contact**, **Contact person**, **Project** and **Activities**. Read more about this below.

Quotation Settings

In the User Setting for Quotation you decide what will be shown in the screen when you are using the program. You can also make a few selections that will simplify the registration process. **Quotation repeating** and **Group quotation** are transferred to quotations with the help of wizards. In user settings under the **Quotation** tab you can decide where the system should lead you after the wizard is complete. This can make routine work much more efficient.

The Company Settings control the usage methods for all users. Be aware that these settings are the same for Quotations, Orders and Invoicing.

Quotation Templates

Quotation templates are created in Quotation registration the same way a regular quotation is created, but without a given customer. You select **Quotation template** from the top right Status drop-down list. Later you can create many quotes by transferring it to group quotations. If you are creating a single quotation, it is recommended to duplicate an existing quotation by using the **Duplicate** icon from the toolbar.

> **Note!** Quotations with status **Quotation template** must not be mistaken with document templates for quotations that you can use for printouts of type **Quotations advanced**.

User Settings for Quotation

Through **User settings** you can specify how the quotation screen will look and work and modify it to suit your own needs. User settings only apply to the current user and will not affect other users.

You can open user settings from **View - Settings - User - Settings per Module** or by clicking on the **User settings** button in the top toolbar.

Tip! User settings for quotation can be found under the **Company Settings for Sales and Invoicing**.

Default Setup

You can select from three predefined setups.

Basic: Keeps the screen as clear as possible, showing only some of the fields.

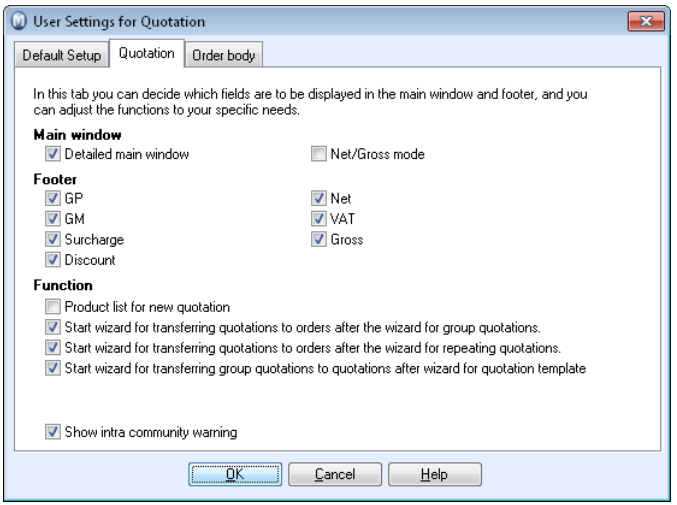
Normal: Shows standard fields and functionality.

Advanced: Shows all available fields and more functionality.

Click the relevant button to choose one of the predefined setups.

Quotation

Here you can select what to display in the main quotation card, the quotation's footer and in function. The **Product list for new quotation** automatically opens the product list when a new order is created.



Group quotation, quotation templates and quotation repeating are all transferred to quotation by using the **Transfer** button in the toolbar. You can efficiently process orders/quotations by using the check boxes and by specifying whether or not the system will proceed to a new wizard after these operations.

Start wizard for group quotation to quotation after the quotation template is complete: The wizard for quotation template can create a group quotation. Once a group quote is created, you will be directly taken to the wizard that transfers from group quotes to quotes, if you selected this option here.

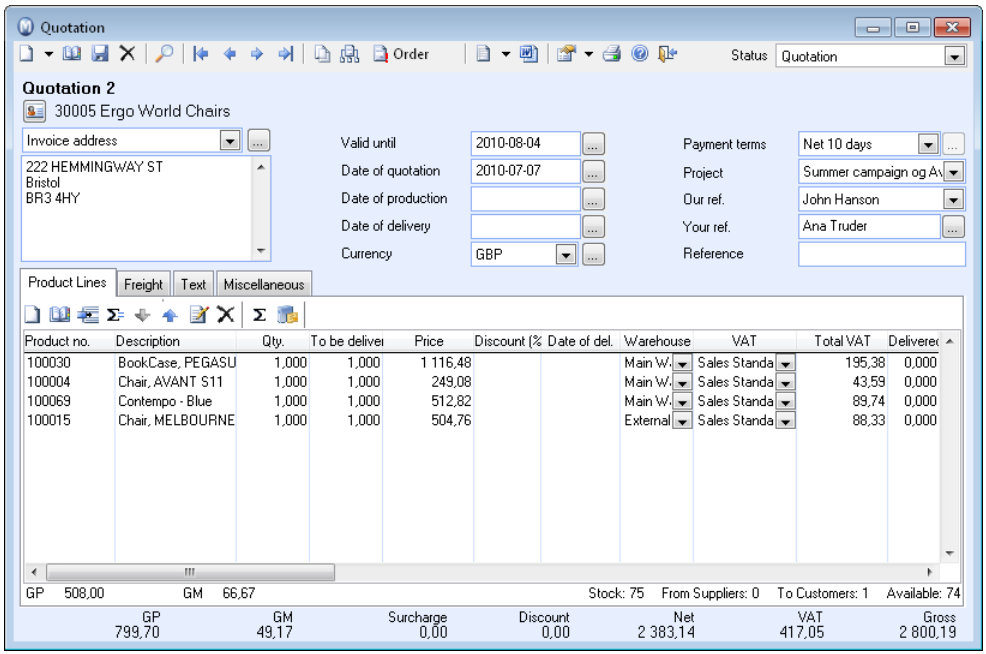
Start wizard for quotation to order after the wizard for Quotation repeating is complete: Repeat quotations are transferred to quotations for each individual customer, and/or the same customer in different intervals, via the **Transfer** button. When you select this option, you will allow the system to take you directly to the wizard to transfer quotation to order when the process is complete.

Start wizard for quotation to order after the wizard for group quotation is complete: The wizard for transferring group quotations to quotations for each customer is run via the transfer button in group quotation. If you select this option, the system will automatically start the wizard for creating orders.

Order body

Under the **Order body** tab you can decide which column settings and footer to display in the quotation card.

The Quotation Register



Read more about **Important Tools** in the introduction manual "Settings, Reports and Filters" for information on the other buttons in the toolbar.

Duplicate: Launches the wizard for duplication of quotation/order/invoice.

Order Hierarchy: The **Order Hierarchy** button gives a hierarchical overview of orders/quotations with invoice numbers/credit note numbers.

Order: Transfers the quotation by creating an order.

Create Activities: By clicking the arrow button, you can choose to **Call a Contact** or **Send e-mail to contact**. An activity linked to the quotation is created.

Advanced Quotation Printouts: Transfers the quotation printouts to Microsoft Word where they can be edited. The button gives you access to documents in the document list which are linked to the quotation.

User Settings: Opens the user settings for quotations. Use the arrow button to open the **Company Settings for Sales and Invoicing**.

Print: The quote can be sent to the printer, e-mail or fax, be transferred to Microsoft Office Word or to the Print Preview screen. If you have installed a PDF-printer you can transfer the quotation to the PDF format as a file.

Status: The drop-down list displays the current status of the quotation. You can navigate through the different registers by using the drop-down list. The list contains the statuses

Quotation Cancelled, **Lost Sale**, **Quotation**, **Quotation Repeating**, **Quotation Template** and **Group Quotation**. Read more about how to use the drop-down list in the chapter "Getting to know the Program" in the introduction manual "Settings, Reports and Filters".

Address: From the drop-down list, you can choose between the recipient's **Invoice address** and **Delivery address**.

Valid until: Click the search button to the right of the field to select a date when the quotation will no longer be valid.

Date of quotation: Click the search button to the right of the field to select a date when the quotation was issued.

Date of production: Click the search button to the right of the field if you wish to enter a date when the product (s) were produced. This field has a purely informative purpose and can for instance be used if your company sells perishable products.

Date of delivery: Click the search button to the right of the field to select a delivery date.

Currency: From this drop-down list you can choose between the most commonly used currencies. You can click the search button in order to open the **Currency** window which allows you to choose from a complete list of currencies.

Payment terms: Select which payment term will be used for the quotation. If you select the option **Visa**, you will be able to click the search button to the right of the list and specify further information about credit card payment.

Project: From this drop-down list, you can choose to link the quotation to one of the projects that you have registered in the project register.

Our ref.: Via this drop-down list you can assign an employee from the employee register as responsible for the quotation.

Your ref.: Enter the name of the person or company who will receive the quotation. You can also click the search button if you want to select a contact person who has already been registered within the system's contact register.

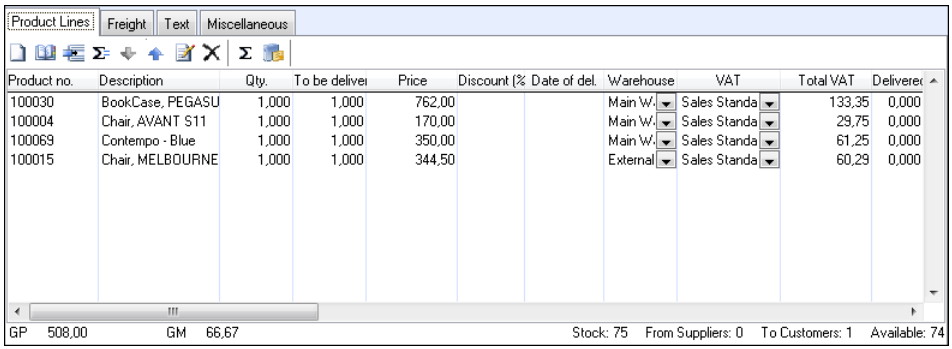
Reference: In this field you can enter a reference code that can later be used to manage or filter your quotations.

The Tabs in the Quotation Module

Product Lines

In the tab **Product Lines** you can define which products will be included in the quotation. The tab is integrated with the product register which means that all necessary product information is automatically retrieved from the product register.

Tip! Press [**Enter**] or [**Tab**] on the keyboard to move between the columns.



New: Click the **New** icon in order to insert a new product line. You can also press **[+]** on your keyboard. Enter the product number in the **Product No.** column. The product information is retrieved automatically from the product register. You can change any of the values, such as price, discount or VAT, in the respective columns.

Note! Any changes you make in the **Product Lines** tab will not affect the information registered in the product register.

Show product list: Click this icon to open a list containing all products registered within the system. You can use the filters in the window's toolbar in order to limit the contents of the list. Select a product and click **Insert**.

Insert product line: Click this icon if you want to insert a product line between two existing lines. A new line will be inserted above the highlighted line.

Show partial sum: Click this icon if you want to see net, vat and gross sum based on the active product and all above, but not including any previous sums.
Click **Remove partial sum** if you want to deactivate the function. Note, that you cannot select a component; if a product bundle shall be the last product for the sum, you will have to select the bundle's main product.
Note! When the function is activated, the sum(s) will also be shown on the reports for quotation, order, invoice and credit notes.

Move up product line: Click this icon if you want to move this product line one position up. In case the icon **Show partial sums** is selected, the sums will be adjusted.

Move down product line: Click this icon if you want to move this product line one position down. In case the icon **Show partial sums** is selected, the sums will be adjusted.

Edit order line description: Click this icon if you wish to insert a text describing or commenting on the product line. In the window that opens, you can the select text category from the drop-down list in the upper left hand corner. When you have registered the text, the field **Order line text** will be displayed to the right of the toolbar to indicate that the product line contains additional text.

Delete: Click the **Delete** icon in order to delete the selected product line.

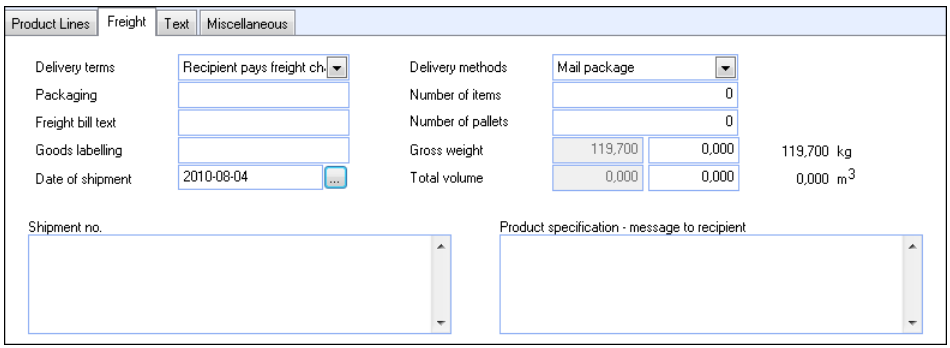
Regenerate order lines: By clicking this icon, you can restore individual values. In the window that opens you can choose to restore all product lines or just the active one. You can also select which columns you want to restore to the default values as they are registered in the product register: **Unit price**, **Expenses**, **Discount**, **Warehouse**, **VAT code** and **N/C**.

Go to product card: Click this icon to open the product register.

Freight

You can state details of the consignment in the **Freight** tab. When registering a quotation, it may prove useful to enter information about **Delivery terms**, **Delivery methods**, **Number of items** and/or **Number of pallets**, **Gross weight** and **Total volume**.

More detailed information about the actual consignment can be registered when the quotation is transferred to an order since this information is used when printing out consignment notes, for example.



Delivery terms: From the drop-down list you can select which term will be applied to a future delivery.

Packaging: In this field you can enter a description of the type of packaging that will be used.

Freight bill text: In this field you can enter information that you want to be included on future freight bills.

Goods labelling: You can use this field if the recipient wants the shipment to be labelled with an internal identification code.

Date of shipment: In this field you can enter the date of shipment when the quotation has been transferred to an order, and the products are ready to be sent to the customer.

Shipment number: Here you can enter information such as the shipment number used by the transportation company.

Delivery methods: From the drop-down list you can select how the products will be delivered.

Number of items: Here you can indicate how many individual items the consignment will contain.

Number of pallets: Here you can indicate how many pallets the consignment will include.

Gross weight: The weight is retrieved automatically from the product card. In the field to the right, you can enter any additional weight, such as the weight of the pallet or packaging material.

Total volume: The volume is retrieved automatically from the product card. In the field to the right, you can enter any additional volume, such as the volume of the packaging material.

Product specification: Use this field to write a message to the recipient if the quotation is transferred to an order and subsequently delivered.

Tip! In the drop-down lists for **Delivery terms** and **Delivery methods**, you can right click and select **Change in properties register** in order to edit or add delivery terms or methods.

Text

From the **Text** tab you can enter text that will be shown on your printouts. You can either write the text directly into the text field or select the required text type from the **Select text** drop-down list. It is possible to have several texts displayed on various reports.

Select text

If you wish to choose between all existing text types registered in the properties register, select the text type from the drop-down list before clicking the search button.

Regular text: The text will be displayed on the order and invoice reports.

Pick list text: Enter the text that will be displayed on the pick list.

Text for delivery note: Enter the text that will be displayed on the delivery note.

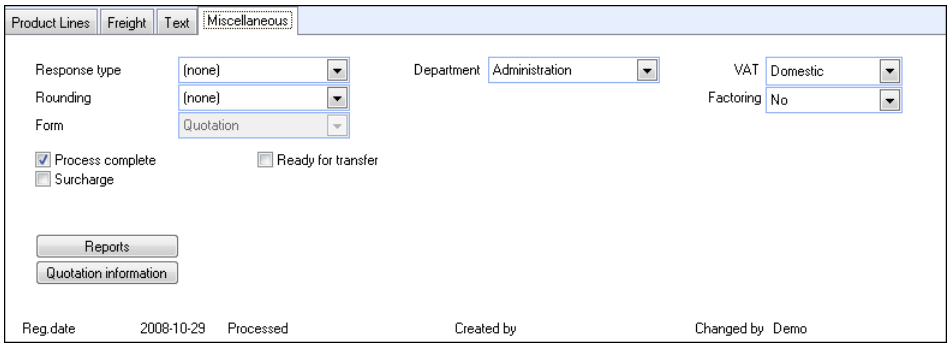
Text for service order: If you select Text for service order you can enter text in the left field which will be shown on service order printouts. Use the arrow button to move the text to the right field to display on service order printouts.

Intra community text: The text is displayed on invoices with order lines that have a VAT code for intra community supply of products and services.

Tip! The fixed texts can be edited in the properties register, by selecting **Fixed text, order**. You can open this window directly by right clicking in the field and selecting **Change in properties register**.

Miscellaneous

The **Miscellaneous** tab allows you to register information about the quotation and its recipient, for example response type, rounding and department.



Response type: From the drop-down list you can choose how the quotation recipient will be contacted. You can right click the drop-down list and select **Change in properties register** in order to edit or add new response types.

Rounding: Select how the sum in the quotation should be rounded.

Form: The field specifies which form will be used when printing. The field cannot be edited.

Department: From the drop-down list you can select which department within your company should be linked to the quotation. You can right click the drop-down list and select **Change in properties register** in order to edit or add new departments.

VAT: Here you can specify which type of VAT should be used if the quotation is to be transferred into a sales order.

Factoring: If the quotation is transferred to a sales order, use this drop-down list to specify if the accounts receivable should be available for factoring.

Process complete: Check this box when you have entered all relevant information.

Ready for transfer: Check this box when the quotation is ready to be transferred to an order. In the company settings for sales and invoicing, you can activate the setting **Do not transfer before 'Ready for transfer' (quotation) or 'Ready for invoicing' (order)** in the **General** tab, in order to prevent quotations from being transferred before this check box has been ticked.

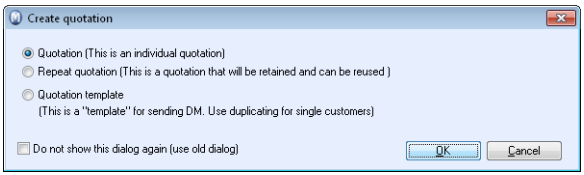
Surcharge: This check box will be displayed if you have defined that the company sells products with environmental tax or other special charges in the company settings for product. Select this check box if any of the products in the quotation are associated with environmental tax or other special charges.

Reports: Click this button to change the language for printouts and/or how product bundles are displayed in the reports.

Quotation information: Click this button in order to register internal information about the sales process.

Working with Quotations

When you click the **New** button, a window will open which allows you to choose between a **Quotation**, **Repeating quotation** and a **Quotation template**.



If you do not want this dialogue box to open when clicking New, check the box in the lower left corner. You are able to select quotation type later, by using the small black arrow next to the **New** button. This method is used within the description below.

How to create a standard quotation

1. Go to **View - Sales/Invoicing - Quotation Registration**.
2. Click the black arrow next to the **New** button and select which quotation type you would like to create.
3. Select **Customer**.
   All fields in the window's upper half will be filled in automatically, including the various information registered regarding the customer. You are able to override this information if necessary. In addition, you are able to specify which product is linked to the quotation and who the reference person at your company is. You are now able to register the product information in the **Product Lines** tab, within the window's lower half.
4. Click **Show Product List** in the **Product Lines** tab, in order to display the product list and select which products to include in the quotation. Within the product columns, you can edit the number of products, prices, discounts etc.
   You are also able to click **New** in the **Product Lines** tab. If you remember the product number you are able to enter this directly into the field. The same result is achieved by double-clicking an empty product line or entering '+' using your keyboard and then entering the product in the column **Product No**.
5. Repeat the step above in order to insert more product lines.

   When you have entered all products, the quotation is ready to be sent to the customer.

Select the type of quotation you want from the **Status** drop-down list. You then select the name of the customer you want to create a quote for and click **OK**. The quotation cannot be linked to a contact if you select **Quotation template** from the Status drop-down list. You can do this by transferring the quote to **group quotation** after the template is created. If you chose **Quotation repeating,** from the Status drop-down list, you can repeat quotes for a contact without having to create it several times. You can choose how often you wish to send the quote by using the **Frequency** button under the **Miscellaneous** tab.

Tip! You are able to right-click within the fields that contain selection alternatives from the properties register. This selection is called **Change in properties register**, and will open the properties register in order to make amendments or add new alternatives directly. Example: In **Quotation**, in the **Text tab**, right-click in the field next to **Select text** and click **Change in properties register**.

Processing Quotations to Orders

If a quotation is accepted, it is transferred to the **Order module** for further processing. You should be aware that the quotation will no longer exist in the **Quotation module**. The transfer takes place via a wizard.

How to transfer a quotation to order

1. Go to **View - Sales/Invoicing - Quotation Registration**.
2. Select **Quotation** in the drop-down list at the top right of the quotation card and click the **Order** button on the toolbar. The wizard will start.
3. This wizard will lead you through all necessary settings and filters.
4. First mark the quotation you wish to transfer, either the one which is currently **Active**, **All** or Filter. If you select **Filter**, a screen will appear where you can specify the criteria further.
5. Click **Next** when you have read the contents of the welcome window and marked the correct alternative. Follow further instructions of the wizard.

The order is not created and can be accessed from the Order/Invoicing screen.

Printing Quotations

Depending on how you create quotations (group quotations, repeating quotations, etc.) they can either be printed individually or as a selection of all created quotations in the module.

The quotation can be sent to printer, e-mail or fax, be transferred to Microsoft Office Word or to the Print Preview screen. If you have a PDF printer installed, then the quotation can be transfer to PDF format as a file.

How to print a quotation

1. Click **Print** (Ctrl + P) in the toolbar to print a quotation.
2. Select between an individual **Quotation** and an **Quotation advanced**.
3. Select if you wish to print the **Active** quotation or if you wish to define a **Filter** and then click **Next**. . You can find out more about Queries in the "Settings, Reports and Filters" manual.
4. Specify the properties required for the quotations you are going to print out, and click **Next**.
5. Select which media you want to use to print the quotations, and click **Complete**.
6. If you selected to print to **Microsoft Office Word**, you will now receive a window where you can select the document template for the print out. Select the desired template, and click **OK**.

You have now printed a quotation.

E-mail: One of the printout options is to print to e-mail. The program will then automatically convert the printout to pdf format and attach it to an e-mail to the recipient.

Tip! In the company settings for contact management - and on the contact/contact person itself - you can define default **E-mail recipients**.

Microsoft Word: If you select Microsoft Office Word when printing, this will create a Word document based on the document template for the quotation included in the program. New document templates can be created and edited from **View - Document - Document templates** menu, where you select the **Quotation template** module from the drop-down list. You can find out more about templates in a separate chapter.

Group Quotations

A group quotation is a quotation that goes out to many customers. You can create a one-off quotation from a group quotation or transfer the group quotation into a one-off quotation. Each and every contact can have a quotation created from the Group quotation.

This way you can, for example, create a group quotation and distribute the quotations as the sales process is directed towards each customer. When all the customers included in the group quotation have had quotations created, you will not be able to create more individual quotations from group quotations.

Quotation templates are created in the Quotation Register without entering a customer. Select the **Quotation template** status from the drop-down list at the top right of the screen. Later, you can create several quotations from the template, which will be transferred to the **Group quotation** status.

You can also create quotations to several customers directly from the quotation template by using this wizard.

If you are creating a single quotation it is recommended to duplicate an existing quotation by using the **Duplicate** icon from the toolbar.

In help (F1), you can find more information about how to create a group quotation.

Transferring from a Group Quotation to Individual Quotations

A group quotation is a quotation created for several customers at the same time. A group quotation is created via a quotation template with the help of a wizard.

As you generate quotations for individual customers from **Group quotation**, the related group quotation will be 'emptied' of customers. This means that you are not able to generate individual quotations for the same customer more than once.

How to transfer from group quotation to individual quotations

1. Click the **Transfer** button in the toolbar. This opens the first window of the wizard.
2. The wizard will lead you through all of the necessary settings and selections. Select which contacts in the group quotation you wish to send the quotation to - either **All** or **Query**.
3. Click **Next** when you have read the contents of the welcome window and selected the correct alternative. Follow the wizard's instructions.

   Separate quotations have now been created for each of the customers you selected in the wizard.

Note! By using the **Order hierarchy** button in the toolbar you can see the invoices that are generated as a result of the Quotation template.

Repeating Quotation

A repeating quotation is linked to a contact and can be generated several times. It retains its status, irrespective of how many quotations have been generated.

How to Create a Repeating Quotation

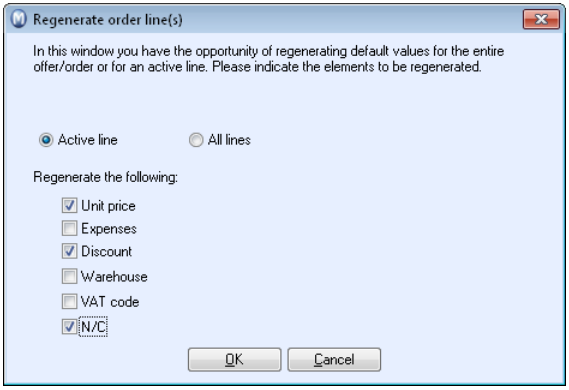
Repeating Quotations are created as regular quotations with the status **Quotation repeating** and are selected from the Status drop-down list at the top right of the quotation card.

Click the arrow next to the **New** button and select **Quotation repeating**. You can now create the quotation in the usual way.

In help (F1), you can find more information about how to create an individual quotation based on a repeating quotation.

Regenerating Order Lines

The **Regenerate order lines** button allows you to regenerate default values for the entire quotation or for the active line.



This could prove necessary if there have been price changes in the price list, or if VAT and N/C changes have occurred etc.

Note that the function can update **Active line**, i.e. the marked line in product lines, or **All lines** in the specific quotation that is open.

Σ To update an order line on a quotation, you simply open the quotation and click on the **Regenerate order line** button in the **Product lines** tab. Indicate which elements you wish to update and click **OK**.

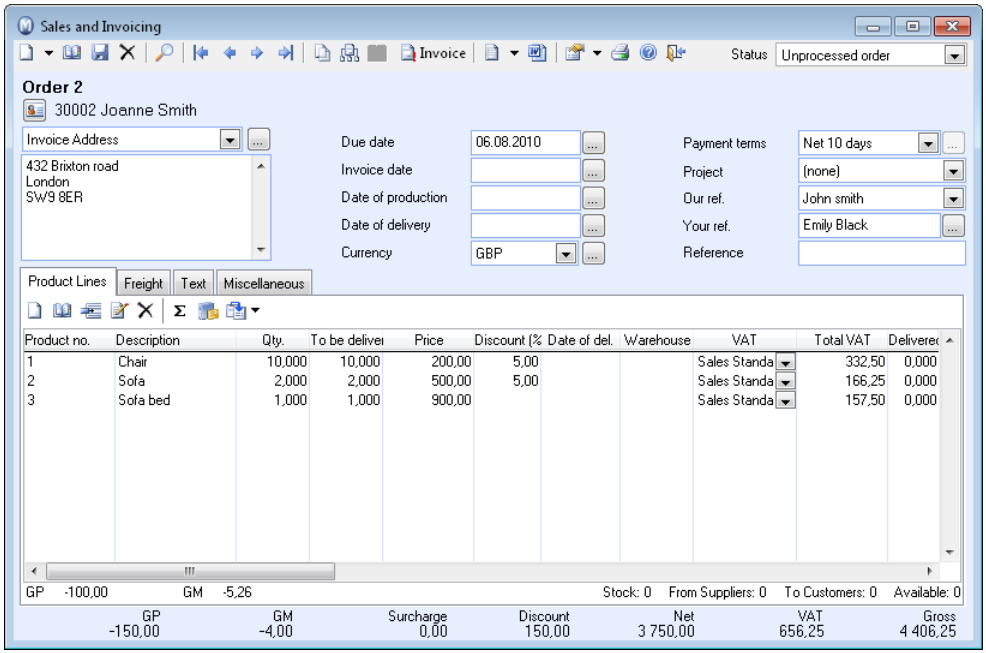
Order Line Text

The **Edit order line description** button, in the **Product lines** tab under **Sales and invoicing,** allows you to enter text that describes each product. The button will open the **Order line text** window.

If you have entered information about the product in the **Product register** under the **Product information** tab, you can select to add this text by using the drop-down list.

Sales and Invoicing

A created order forms the basis for the invoicing of that order. Information about the customer and products is inherited from the order's registers and taken from order to invoice. This makes registration much easier.



Order Status

An order has different statuses depending on how far it has been processed. You can view what status an order is in by looking at the **Status** drop-down list in the top-right corner. Read more about how to use the drop-down list in the chapter "Getting to know the Program" in the introduction manual "Settings, Reports and Filters".

The status represents the different stages in the sales process. An order usually starts out as an **Unprocessed order**. You can **Transfer** the order by clicking on the **Invoice** icon in the toolbar. Transferring involves printing out an invoice. The order will then change status to **Invoiced** or **Invoice (not delivered)**. An invoice can also be a cash invoice, meaning an invoice that is paid as it is issued.

The invoicing process can either start after the products are delivered, or before they are delivered. If invoicing is to be allowed before delivery you select this option in Company Settings. Alternatively, you can also decide whether the order will be invoiced when you have set the invoice to **Ready for invoicing**. You can select the **Ready for invoicing** check box via the **Miscellaneous** tab.

Backorders

An order can be defined with the status **Backorder**. This means that components of the order have been delivered and invoiced.

A backorder is generated when you choose to invoice an order after you have altered the quantity which is being delivered. The backorder is handled as a new order in the system. If you choose to print the backorder, the original order number will appear on the printout.

In order to use the backorder functionality, make sure that the box **Do not invoice before all products on an order have been delivered** is un-ticked in the company settings for Sales and Invoicing.

You also credit an invoice from here by clicking the **Delete** button. Read more under Cash Invoice, Backorder and Crediting.

Printouts

Orders can be printed in a number of different ways and can be sent to the printer, e-mail, fax and to a screen preview. If you have installed a PDF printer you can transfer the document to PDF format as a file.

Tip! You can use the filter settings to invoice several sales orders and credit notes at the same time. You can also create individual reports for the invoicing. The individual reports supplement the system reports which can be accessed by clicking **File - Print**. An example of how to use this functionality can be found below.

Language and customising the appearance

The order can be printed in a different language and/or with a logo added to the printout and you can enter your own fixed text.

Read more about adding logos to printouts in the introduction book "Settings, Reports and Filters".

Batch Invoicing

You can create orders with status **Unprocessed batch order** to collect them for batch invoicing.

Credit Limits and Credit Stops

You can set up credit limits and account on hold statuses for orders. These will prevent the creation of any orders for customers whose accounts are on hold or who have exceeded their credit limit.

Integration with other modules

If you created a quotation to a customer, you would normally have registered the necessary information to create an order once the customer accepts it. Therefore it is possible for you to create an order from the quotation in just a few clicks. Product deliveries are processed through the Warehouse module, if you keep products in stock. The module is integrated with the orders by a number of available buttons and options that open orders from overview screens in the warehousing module. The warehousing module gives information on **Orders, not delivered** and **Stock**.

In order registration you will be able to get an overview of the warehouse status for the various products. If it is necessary to purchase products, you can create a purchase order based on the current order. Maybe you have already ordered the products but they have not yet arrived? In this case you can make a purchase reservation for this particular order.

You can also choose to view the **Delivery Plan** window which displays products that have been purchased but not yet delivered. See Creating a Purchase Order Based on a Sales Order, Reserving a Sales Order against a Purchase and Delivery Plan.

By clicking on the arrow to the right of the **Create Activities** button you can create customised, often-used, activities. Some add-on products allow you to define customised activities in addition to those activities which are pre-defined in the system.

Sales and Invoicing is integrated with other modules in order to retrieve, create and edit quotations as a natural part of the working process. You will find tabs for Order in the following modules: **Contact**, **Contact person**, **Project** and **Activities**.

In **Time Sheet Input** there are options that will allow you to transfer completed hours to Order/Project, in order to bill the hours onwards to your customer (Onward billing).

Note! If you regularly invoice the same customer for the same products and/or services, you might want to consider using the **Subscription Invoicing** module for this. This module gives you a complete overview of which subscriptions and contracts should be invoiced to which customers and how often.

Sales and Invoicing Settings

In the User Settings for Sales and Invoicing you can decide what you would like to display in the Sales and Invoicing screen. You can also make selections to simplify the registration process.

The Company Settings control the usage methods for all users. Be aware that these settings are the same for Quotations, Orders and Invoicing.

Note! It is possible to edit posted invoices and journals without needing to credit the item or redo work already done. You can activate this setting within the Company Settings for Sales and Invoicing by going to **View** - **Settings** - **Company** - **Settings per Module** - **Sales and Invoicing** then under the **General** tab you are able to select **Edit posted invoices and journals**. Read more about this new functionality within the "Financials, Logistics and Human Resources" book in the "Accounting" chapter.

How to Create a New Order

How to create a new order

1. Go to **View - Sales/Invoicing - Order registration**.
2. Choose if you want to create an **Unprocessed order**, **Unprocessed batch order** or an **Unissued credit note** in the **Status** drop-down list at the top of the window.
3. Click **New** and select a customer.
4. Click **OK**.

   An order is generated. Information regarding addresses, payment and delivery terms, etc. is automatically imported from the contact management module. You can override this information by entering new information in the Sales/Invoicing module.
5. Click **New** in the **Product Lines** tab in order to add a product. Repeat this process for all products you wish to include in the order. Read more about Product Lines below.
6. Enter the relevant information into the other tabs.
7. Click **Save**.

   The order has been created and is given the status Unprocessed order.

Click the **Print** button to print an order, a sales order confirmation, a consignment note, etc.

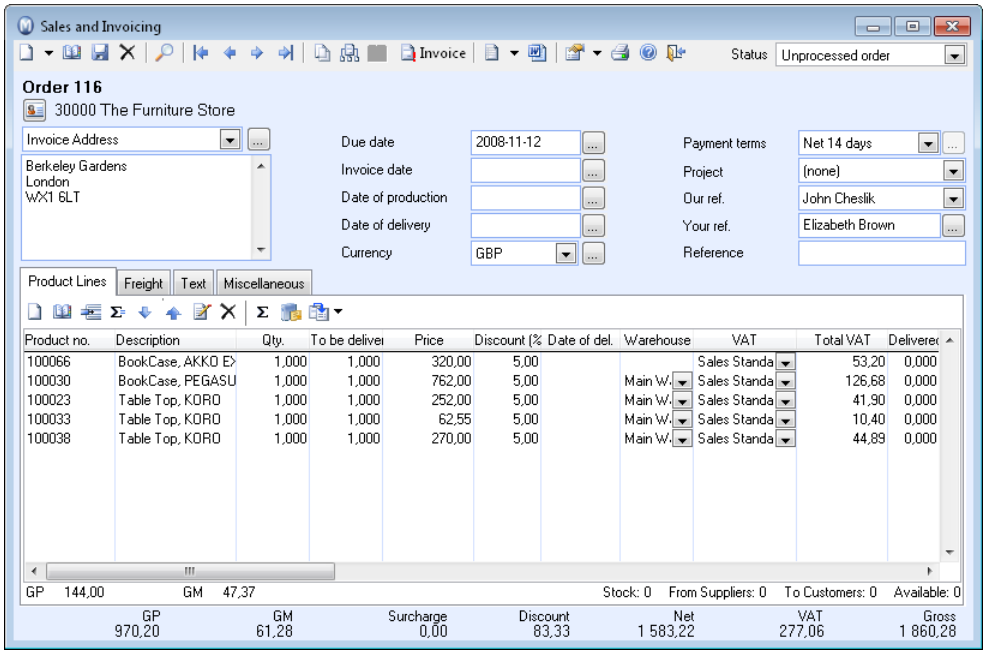
Click the **Invoice** button to invoice the order via the invoicing wizard.

Please note that you cannot delete a contact from the order once it has been registered. If you have entered the wrong contact, click **Delete**, and choose either **Cancelled** or **Lost sale**.

Tip! It is possible to edit invoices after they have been posted. This functionality allows you to edit posted invoices without needing to credit the item or redo work already done. Read more about this new functionality within the "Financials, Logistics and Human Resources" book in the "Accounting" chapter.

The Sales/Invoicing Register

The Sales and Invoicing register is built the same way as most other registers in Mamut, with a main window and several tab cards where you can register information.



Read more about Important Tools in the introduction manual "Settings, Reports and Filters" for information on the other buttons in the toolbar.

New: Create a new order, batch order or unprocessed credit note.

List: Display a list of registered orders. You can choose default sorting of this window in the user settings. You can define a filter in the window in order to find certain items. Read more about Filters in the introduction manual "Settings, Reports and Filters".

Delete: The function of the delete button differs depending on the status of the order. The items are not deleted from the system; an unprocessed order can for instance receive the status Cancelled or Lost Sale. The items are therefore available for certain order reports.

If you **Delete** an invoice, a credit note is generated automatically.

Duplicate: Launches the wizard for duplication of quotation/order/invoice.

Order Hierarchy: The **Order Hierarchy** button gives a hierarchical overview of orders/quotations with invoice numbers/credit note numbers.

Show Journal in Ledger: Display the journal entry in the customer ledger. The button gives you easy access to the ledger overview.

Invoice: The order is invoiced when you click the **Invoice** button. The invoicing process consists of creating an invoice printout. The order will then be transferred from the status **Order** to the **Invoice** status, or **Invoice, not delivered**.

Create Activities: By clicking the arrow button, you can create customised activities. By using Activity Templates, you can choose which activity types should be available in each module.

Open Sales/Invoicing document list: Access documents linked to the order/invoice. You can choose create a PDF copy of an invoice during the invoicing process by going to the Export tab in the company setting for Sales and Invoicing.

User Settings for Sales and Invoicing: Opens the user settings for Sales and Invoicing. Use the arrow button to open the Company Settings for Sales and Invoicing.

Print: Orders can be printed to several different document forms. You can also send it to printer, e-mail and fax or on-screen preview.

Status: The status of the order represents how far it has come in the invoicing process. An order is usually created as an **Unprocessed Order**. Choose which status you wish to view from the drop-down list. Read more about how to use the drop-down list in the chapter "Getting to know the Program" in the introduction manual "Settings, Reports and Filters".

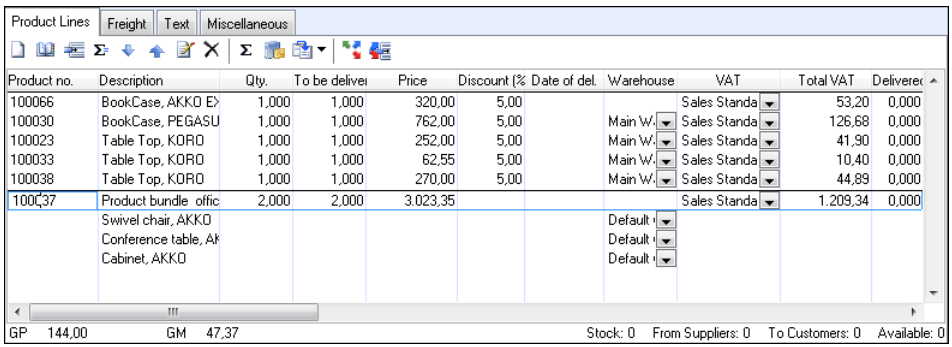
Tip! If you want to assign an **Early Payment Discount** for future payment, select the discount under **Payment terms**.

The Tabs in Sales/Invoicing

Product Lines

When you have selected the products from the **Product register** the necessary information such as prices and discounts will be retrieved from the **Product** and **Contact Registers**.

Press [**Enter**] or [**Tab**] on the keyboard to move between the columns.



Select the products to be sold. This can be done in two ways:

Click **New** to register the product number in the new line. The relevant product is registered together with all of the information from the product card. If you want to change the information, you can do this in each individual column in the product line.

or

Click **Show product list** to display a list of the products. The drop-down list in the top right window that is displayed works like a filter, allowing you to select a product type. Only products belonging to the chosen product type will be displayed in the list. Select the desired product and click **Insert**.

> **Tip!** If you change the ordered quantity in the sales order the cost price will be updated again from the **Product card**. If you created the order from a purchase you should transfer the purchase again as the cost price on the purchase varies from the one in the product card.

If you want to insert a product line between existing product lines, you can do this by using the **Insert product line** button. A new line is inserted above the selected product line.

With **Show partial sum** you add a partial sum. This can be beneficial for orders with multiple products, as it allows you to organise products into groups and assign partial sums for the groups: Select the last product you want to include into a partial sum calculation. Then click this icon. All lines above will then automatically be grouped together into a partial sum (not including any previous partial sums) and the sum of the group will we be shown below the product lines list.
Partial sums are also shown on all sales reports (i.e. invoices) you send to your customer.

You can delete a certain partial sum again by clicking the **Remove partial sum** icon.

Click **Move up product line** and **Move down product line** if you want to sort your products in a certain order.

Click **Edit order line description** in the **Product lines** tab if you want to register a specific text to describe each product line. You can also enter text from the product register that you select from the drop-down list.

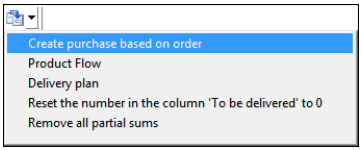
The **Delete** button in the **Product Lines** tab deletes the product line which has been highlighted in the list. You cannot delete an invoiced product line,

> **Note!** If you are using the system's warehouse functionality, deleting products will generate stock movements in the warehouse module. The products will be restored to the warehouse. In addition, if you have set up the system to expense products to P/L when items are removed from stock, a journal entry will be created. These processes are carried out automatically "in the background". You can view the stock movements via the **Product Flow** window (more information below).

Σ Click **Regenerate order lines** to update/regenerate default values for the entire quotation/order, or for the selected line.

Click **Go to product** card if you want to check or change product information.

Click the **Arrow** to the right of the button to select an action:



The buttons may differ, depending on which functions you have activated.

Create purchase based on order: When receiving an order from a customer and need to order products, you can **Create purchase based on order**. The feature must be activated in the company settings for products.

Linking/Reservation of Purchase: You can link the products in an order to a specific purchase by clicking **Linking/Reservation of Purchase**. The feature must be activated in the company settings for sales and invoicing.

Reserve Stock Items: By **Reserving Stock Items** included in an order, you can reserve products which are in stock or which have been ordered for the specific order. The feature must be activated in the company settings for sales and invoicing.

Product Flow: The **Product Flow** window gives you an overview of all stock movements. The window lets you track the items which caused the movement and locate the journal entry in the Nominal Ledger, if such en entry has been registered.

Delivery plan: The **Delivery plan** feature lets you keep an overview of expected delivery dates of purchases containing the product which has been highlighted in the list. The option is only available in orders/invoices which have not been fully delivered. This applies to products which have been ordered, but note delivered.

Reset number in the column 'To be delivered' The value in the column is by default retrieved from the original order. Here, you can reset all order lines in a backorder to zero.

Remove all partial sums: Click here if you wish to delete all partial sums from the product lines list. Note, that they will also be removed from sales reports you might want to create.

Extract components: Click here if you wish to extract the bundle's components. A security warning will be shown, click **Yes** to continue. The components will now be extracted into separate, independent product lines; individual attributes such as VAT handling and discounts will be re-assigned. Only the amount in the **Qty.** column will be adjusted according to the amount of the former product bundle. This means that if you, for example, have a product with quantity "2" in a bundle with quantity "3", the result will be "6". This button is only shown when you have selected a product bundle.
Note that sub-bundles of the selected product bundle will not be extracted. You will have to select the sub-bundle separately and re-do the procedure.

Insert component: If you wish to add a new component, simply select the correct product bundle or a component in the bundle and click **Insert component**. Choose the product you wish to add as a component from the product list. It will be inserted below the selected component. If wanted, you can also change its quantity.
There are some preconditions: The product bundle must be linked to a warehouse and on its **Product bundles** tab the setting **Warehouse update, sale** must be set to **Update components**.

Freight

You can specify details of the consignment in the **Freight** tab. The information that you register here will be transferred to any future orders and applies when printing consignment notes, for example.

Complete the various fields for information about freight and consignment costs. It is a good idea to enter the **Consignment no**. from the delivery company. This will prove extremely helpful if you later have to trace the product in the case of delay, loss, etc. Information concerning **Gross weight** and **Total volume** is automatically retrieved from the product card.

The fields to the far right of **Gross weight** and **Total volume** allow you to enter an additional weight in the editable fields.

> **Note**! The product's weight will appear as the default **Gross weight** and **Total volume** but you can add to the total in the editable fields to the side. This may prove useful if, for example, you have a pallet that adds an additional 10 kg to the weight of the product.

Text

From the **Text** tab you can enter text that will be shown in your printouts. You can either write the text directly into the text field or you can select among different text types in the drop-down list. It is possible to have several texts that are displayed on various reports.

If you select **Regular text**, you can click the search button on the right and select among predefined texts from the **Properties register**. The **Regular text** will show on the **Order and Invoice reports**.

> **Tip!** The fixed texts can be edited in the properties register, by selecting **Fixed text, order**. You can open this window directly by right-clicking in the field and selecting **Change in properties register**.

Pick list text is entered if you have text that you want displayed on printouts of picking lists.

Text for list of contents can be displayed on lists for content printouts.

If you select **Text for Service order** you can enter text straight into the left field when printing work orders. Text in the right hand field will display when printing a service order. It is possible to move text from the left field to the right by using the arrow.

Miscellaneous

This tab allows you to specify, for example, the type of response, rounding rules, and factoring for individual orders. You also select the **Form** for the order here. The order can also be linked to a **Department**, and the selection you make in the **Batch Order** drop-down list determines whether the order is an unprocessed order or an unprocessed batch order.

At the same time, you indicate how far the order has been cleared for invoicing.

Make any selections from the **Response type**, **Rounding**, **Form**, **Department** and **Batch order** drop-down lists. If you wish to use a different alternative from the ones in the drop-down list, go to the Properties Register in order to define your own alternatives.

VAT: From the VAT drop-down list you can choose between **Domestic**, **Export outside EU**, **Export EU**, **VAT exempt customer** or **Export to EU 3rd Part**.

Factoring: If you use an external factoring company, select **Yes** from the drop-down list.

Select or clear the check boxes below the drop-down lists so that they are appropriate to the relevant quotation. Some of these check boxes are more relevant for multi-user systems so that all users can see how far the order has been processed:

Process complete: By selecting this check box, you tell the other users that you have already registered all necessary information. If there is any part of the order, for example information concerning prices, discounts, freight, etc. that has not been completed, you clear this box to show that the order is not ready.

Surcharge: This setting is inherited from the contact register, but you can also change the setting here. Remember that the surcharge depends on the product, which means that you may also have to register the setting in the product register.

Ready for invoicing: This check box is only relevant if one user registers an unprocessed order and another user invoices it. If you select this box, you show the other user that the order is ready for invoicing.

Picked: If you select this check box, you are communicating to the other users of the program that the ordered products have been picked from the warehouse. This does not, however, necessarily mean that the warehouse itself has been updated.

Report: Click the **Report** button to set the printout language and to specify how product bundles are to be shown in reports.

Order Information: Click **Order information** to register any details about the sales process, such as **Start date**, **Expected end date**, **Probability of sale**, as well as **Status** and **Notes**. If you actively consider **Probability of sale,** and update the field for that, you can in time print out reports showing how many future sales you will possibly win. At the bottom of the **Miscellaneous** tab you can see the name of the person who has raised the order.

Branch network management: If the contact is linked to a **Head Office**, the **Branch network management** button becomes available. This is where you can modify the settings for where the invoice is to be sent, where the products should be delivered and who the discount settings will apply to.

Settings

User Settings for Sales and Invoicing

Via the different tabs under user settings you can customise the appearance of your screen for Sales and Invoicing, allowing you to customise the screen to your needs.

Note! User Settings only apply to the current user and do not affect the settings for other users.

You open user settings by going to **View - Settings - User** and selecting **Sales and Invoicing** in the **Settings per Module** tab or directly in the module by using the settings icon in the toolbar.

Quotation! Please note that the company settings for the quotation module are grouped together with the company settings for sales and invoicing. However, the quotation module has its own user settings.

Default Setup

You are able to define the appearance of the Sales and Invoicing screen. There are three pre-defined settings available.

Simple: Simplifies the screen as much as possible and displays mandatory fields.

Normal: Shows default fields and makes default functions available.

Advanced: Shows all available fields and more functionality.

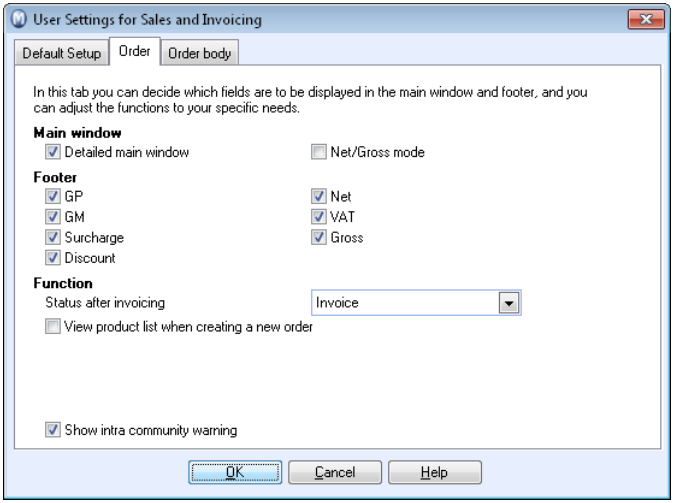
Click on the relevant button to select an option. The screen for Sales and Invoicing will then change accordingly.

Tip! From the other three tabs you can change your setup manually rather than using predefined settings.

Order

Here you can select what is to be displayed in the main window and in the footer, and you select certain functions.

In the **Detailed main window** all details for the top half of the main card are shown, no matter which tab is active. If you remove the tick from the check box, the user will not be able to see the information in the main card other than the order number and the contact's phone number and name.



Net/Gross mode: In the top half of the order card there is a drop-down list where you can select to see the order amount as net or gross. If you remove the tick you will simplify the screen and remove the option (net mode is default).

Status after invoicing: An invoice receives the status Invoiced after invoicing. You can change this to Order, if you prefer.

View product list when creating a new order: Automatically opens the product list when a new order is created.

Show intra community warning: This check box only applies to customers without a VAT number. A warning will appear when adding a VAT code for intra community supply of products/services to a product when there is no VAT no. recorded for that customer.

Order body

Here you select which **Column settings** to display in the Sales and Invoicing card. Choose the columns you want displayed. Note that selecting all will reduce the space for each column. Most users only display a selection of the columns. By un-checking boxes a simpler screen picture is presented and you only display a few columns that are relevant to you.

Footer of product tab: Select which fields you want in the product line tab. This is the footer for each product. The order will still display GP and GM for the whole order at the bottom.

Company Settings for Sales and Invoicing

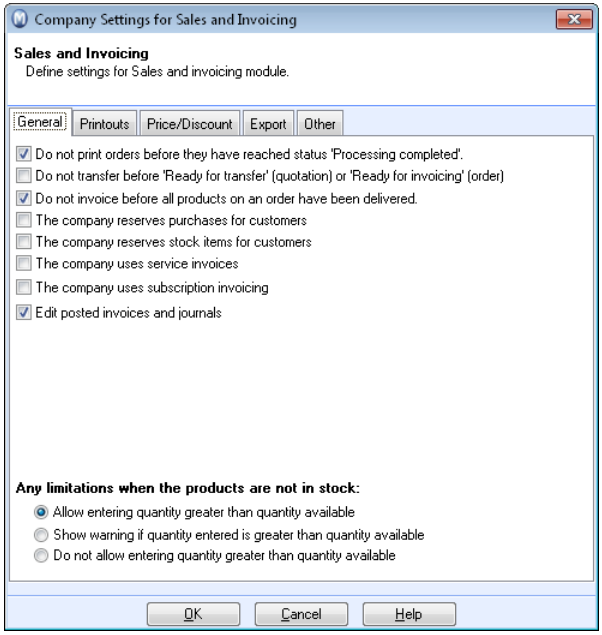
As a rule, invoicing routines vary greatly from company to company. This module is therefore designed to allow the thorough modification of how these routines are carried out in the **Sales and Invoicing** module. The transition from order to invoice with approval routines and printouts is particularly central here.

You can access the company settings for Sales and Invoicing by clicking **View - Settings - Company - Settings per Module - Sales and Invoicing**.

Note! Here you will also find the company settings for quotations. The user settings for the quotation module can be accessed in a separate register.

General

In the **General** tab you will find check boxes regarding order status. These are particularly important if the program is being used by several users, e.g. one registers orders while another registers invoices.



Do not print orders before they have reached status 'Processing completed': Leave unticked to allow for printing of orders before you finished processing them.

Do not invoice before 'Ready for transfer' (quotation) or 'Ready for invoicing' (order): By activating the setting, you will not be able to transfer a quotation to order, or an order to invoice unless the check boxes 'Ready for transfer' (quotation) or 'Ready for invoicing'

(order) have been checked. The 'ready for invoicing' status depends on how you apply the **Ready to invoicing will be updated by printing...** function in the **Printouts** tab.

Do not invoice before all products on an order have been delivered: Leave this box un-ticked if you want to be able to invoice even though the order contains items that have not yet been delivered. You may apply these settings for customers where you have agreed not to invoice before the full order content has been delivered or if you do not want to use delivery registration. A partly delivered/invoiced order will in that case generate a **Backorder** when invoicing. You can change the number of products to be delivered in the field **To be delivered** in the Sales and Invoicing window. The backorder is processed like a new order.

You can allow the company to reserve products for an order from a specific purchase by selecting **The company reserves purchases for customers** and **The company reserves stock items for customers**.

If **The company uses service invoices** you will have opportunities to print out a job description for an order and printout a service invoice, with or without product lines.

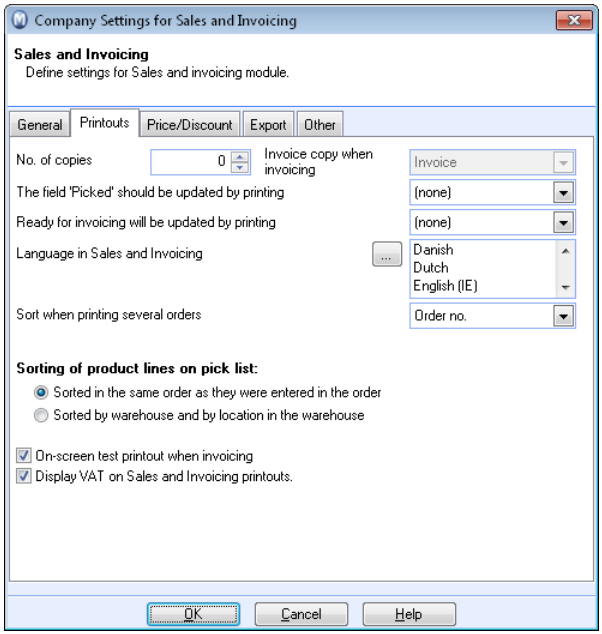
The company uses subscription invoicing should be selected if you would like to be able to easily generate invoices for your customers that have subscribed to a service or regular delivery of your products. The functionality is available only as an add-on product in certain program versions.

Edit posted invoices and journals should be selected if you wish to be able to edit posted invoices and journals without needing to credit the item or redo work already done. Read more about this new functionality within the "Financials, Logistics and Human Resources" book in the "Accounting" chapter.

Any limitations when the products are not in stock: Here you can determine in how far quotations / sales orders with larger quantities of products than what is in stock can be registered: You may decide to ignore this possible issue (**Allow entering ...**). You may like to display a warning to alarm the user that the product is not in stock (**Show warning ...**). Or, for sales orders, you can also prohibit registration when the quantity is higher than the current stock (**Do not allow ...**).

Printouts

Here you can specify settings that determine how your sales reports are to look:



Enter the **No. of copies** (in addition to the original invoice) and which **Invoice copy** you want to print out in the sales and invoicing module.

Invoice copy when invoicing: Select which report should be used when printing invoice copies during invoicing.

The field 'Picked' should be updated by printing: This setting applies to the **Picked** field on the order. Select **Delivery note** or **Picking list** depending on what is best suited to your business.

Ready for invoicing will be updated when printing: Select **Delivery note** or **Picking list** depending on what best suits your business. If you would like to invoice as soon as the picking list has been printed it would make sense for you to select to update to 'Ready for invoicing' status after printing the picking list.

Language in Sales and Invoicing can be selected if you want to print out invoices in a different language. The language will be available as an option in the Sales and Invoicing module and Quotation in the **Miscellaneous** tab when you press the **Reports** button.

Sort when printing several orders: When printing out several orders it might be useful to select a certain sorting order. You could sort by customer no., for example, instead of by order no., which is the default sorting setting. If you use subscription invoicing you might want to sort by subscription no.

You can print out the pick list in two ways, either **Sorted in the same order as they were entered in the order** or **Sorted by warehouse and by location in the warehouse**. The latter can be very useful in achieving efficient picking in the warehouse.

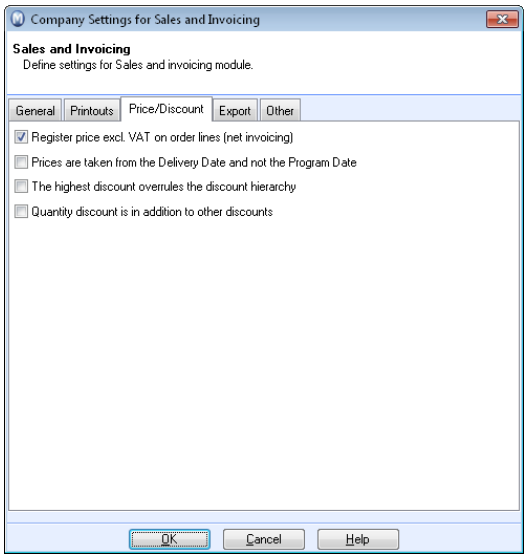
If you always want an on-screen print preview before you print invoices, you can activate this by selecting the **Test printout when sending invoice to screen** check box.

If you do not tick **Display VAT on Sales and Invoicing printouts** this field will not be displayed.

Note! If you remove the tick here, please ensure that this concurs with the rules in your company.

Price/Discount

Here you select the rule that will apply for prices and discounts when registering products for an order.



Register price excl. VAT on order lines (net invoicing): If you select the price is shown without VAT on the product lines.

Prices are taken from the Delivery Date and not the Program Date: By default, the price is retrieved on the program date when the item is created. This means that the system retrieves the price that applies when the order is created. If you enter prices that will be applied in the future, you can select this setting in order to use the new prices automatically based on the sales order's delivery date instead of program date. You must then use the field **Date of delivery** when creating the sales order. The delivery date will indicate an "intended delivery date". If you at a later time change the date of delivery, you will be asked if you wish to regenerate the order lines.

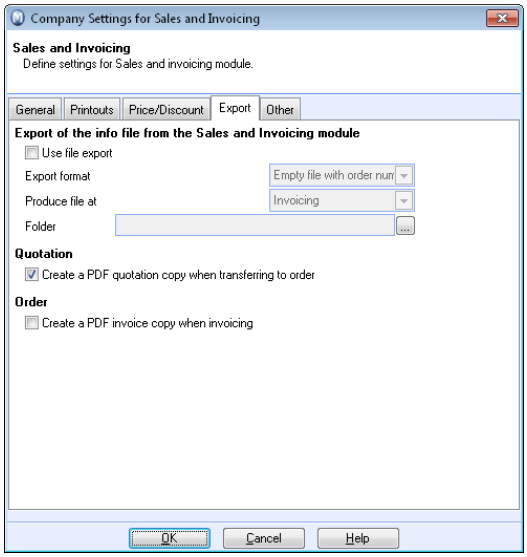
The highest discount overrules the discount hierarchy: If you want to override the discount hierarchy, you should select this option.

Quantity discount is in addition to other discounts: You can also add quantity discounts by selecting this option.

The cost price should include 'Expenses' from the Product card in addition to the Purchase Price: The option is only available if you have selected Purchase Price as the Basis for cost price in the company settings for products, in the **Price processing** tab. If you select this option, the cost price for quotation and order/invoice will be based on purchase price and the expenses in the **Expenses** field in the product card, in the **Price** tab.

Export

You can automatically export information files from the program and the settings for this can be found here.



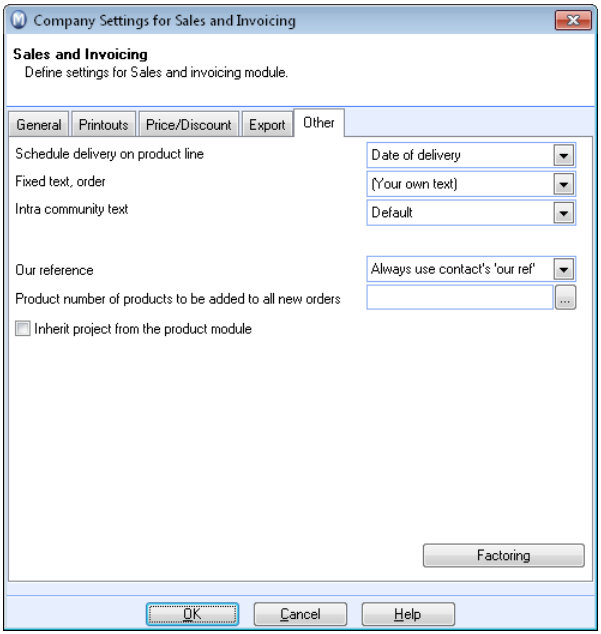
If you want to export orders from the program, you must select **Use file export** and select the **export format**. You can choose whether the export is to occur by printing out a **Picking list**, **Delivery note** or **Invoice**, and in the **Catalogue** field you state where the file should be saved.

Create a PDF quotation copy when transferring to order: The transferred quotation will be saved as a PDF document. The quotation copy can be opened from the order/invoice.

Create a PDF invoice copy when invoicing: Save a PDF copy of the invoice when invoicing. If you have selected the option, you will be able to access the copies from the Sales/Invoicing and Contact modules.

Other

Tab for other settings:



In **Delivery period on product line** you select whether you want to display the delivery week or the delivery date on reports. You can also add **Fixed text, Sales/Invoicing**. The text itself is retrieved from the **Properties register**. This text will then be displayed on invoice printouts.

Intra community text: From this drop-down list you can choose the text shown on invoices with order lines that have a VAT code for intra community supply of products and services. If you choose **Default** the following text is added to the invoice: **Intra community supply of products and services**. You can change this text or alternatively create your own text in the **Properties Register** and add this instead. In the invoice the related products will contain an asterisk (*).

From the **Our reference** drop-down list you decide how Our reference will be selected when creating sales orders.

A product can be added to all orders as they are created by registering the product number in the **Product that shall be added to all new orders**. This could for example be used if you always add a dispatching fee.

You can mark the **Inherit project from product module** check box if you wish.

Factoring: By clicking on the **Factoring** button you can add information about your factoring company.

Invoicing and Crediting Invoices

How to Create an Invoice

Tip! You can choose to view an **On-screen test printout when invoicing** in the company settings for sales and invoicing.

How to create an invoice

1. Go to **View - Sales/Invoicing - Order Registration**, or click the shortcut button on the desktop.
2. Click the **Invoice** button in the toolbar to begin invoicing.
3. Select the type of printouts you require and click **OK**.
   Tip! You can invoice several orders at once by selecting **Filter** to the left in the invoicing window.
4. If you answer **Yes** when asked whether the order is to be invoiced, the **Nominal ledger** and **Customer and Supplier Ledger** will be updated with the relevant changes.

   The original invoice is now printed and you will be asked whether you approve the printout. Note that the order is transferred to the Invoiced status, irrespective of whether or not you have approved the printout.

Tip! If you do not approve the printout, a report will be generated containing all invoices that have not yet been printed. You can later print the invoices at a time that suits you. Please note that the report is not stored within the system and should therefore be printed at once. You can at a later time print the invoices by defining a selection in the print menu. Read more about this below.

How to print an invoice copy

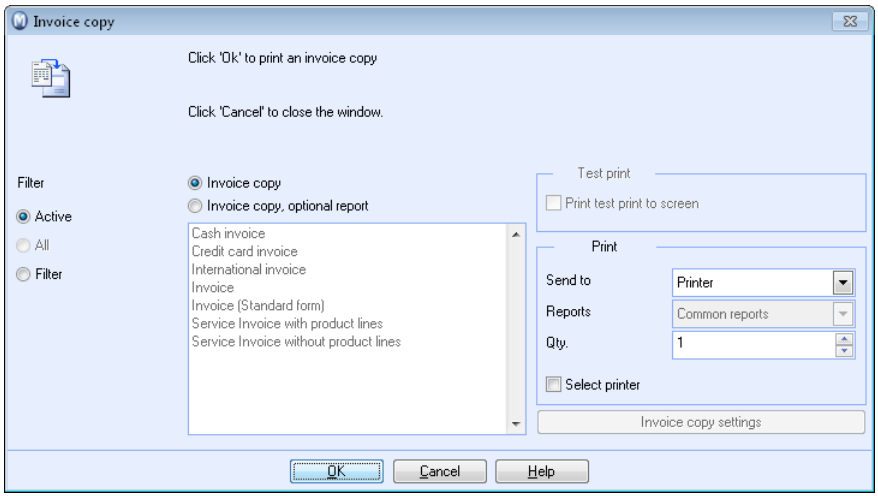
You are strongly recommended to print an invoice copy every time you create an invoice. The setting can be defined in the company settings for Sales/Invoicing.

You can also print invoice copies at a later time. The system saves information about which report and report group were used when the original report was printed.

Tip! It is possible to edit invoices after they have been issued and then print them again. Read more in the introduction manual "Settings, Reports and Filters", chapter "Accounting".

How to print an invoice copy

1. Locate the invoice in the order registration module.
2. Click **Invoice**.



The system suggests an **Invoice copy** and the report group that was used when printing the original report.

3. Click **OK**.

The copy is printed.

> **Note!** If you choose to print an **Invoice copy, optional report**, the copy will not be identical to the original invoice. The same is true if you have edited the report after you printed the invoice.

PDF Copy

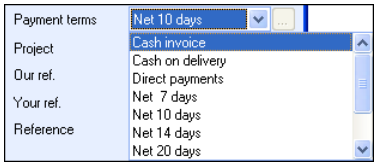
It is also possible to convert an invoice copy to PDF format, so that you always have the possibility to print en exact copy of the invoice.

In the **Company Settings for Sales/Invoicing**, in the **Export** tab, you can choose to create a PDF invoice copy every time you create an invoice. If you activate the setting, you will be able to open the PDF copy directly by clicking the **Open Sales/Invoicing document list** in the Sales/Invoicing module. The copy can also be opened from the **Documents** tab in the contact module. To print the PDF copy, open the file and click **Print**.

Creating a Cash Invoice

How to create a cash invoice

1. Select **View** - **Sales/Invoicing** and **Order registration**.
2. Click **New**.
3. Select the contact and click **OK**.
4. Select **Cash invoice** from the **Payment terms** drop-down list.



5. Fill out the rest of the order and enter the relevant products.
6. Click the **Invoice button** (Transfer).
7. Select **Cash invoice** from the list and click **OK**.
8. Check that the print form to screen is correct (test) if this is displayed. Click **Close Preview**.
9. Answer **Yes** to the question whether the order should be invoiced.
10. Answer **Yes** to whether you want to approve the invoice.

You have now created a cash invoice.

Note! The **Cash invoice** is automatically posted via the customer or supplier ledger if no other settings are made. To check which settings apply to the payment term **Cash invoice** you can select **View - Settings** and **Company database**. Open the properties register and select **Payment terms**. Select **Cash invoice** and click **Edit**. Click **Advanced** to see details.

Crediting an Invoice

How to credit an existing invoice

1. Select **View** - **Sales/Invoicing** and **Order registration**.
2. Select **Invoiced** from the status drop-down list.
3. Browse to the invoice you wish to credit.
4. Click **Delete**.
5. Answer **Yes** to the question whether you want to generate a credit note for this invoice.
6. An unprocessed credit note for this invoice will be created. You can edit it if you need.
7. Select the **Invoice** button in the toolbar to transfer the credit note. If you are informed that the credit note is unprocessed you will have to go to the **Miscellaneous** tab and tick the **Processed** box.
8. Select **Credit note** and **Send to printer**.
9. Click **OK**.
10. Check the preview. Close preview by clicking **Close preview**.
11. The **Credit note, update of warehouse** window will be displayed. If all products are to be updated in warehouse, click **Close**.
12. Answer **Yes** to invoice the order. The credit note will now be posted.
13. Answer **Yes** to approve the printout, if it is correct.

The existing invoice has been credited.

Note! You cannot credit an unprocessed order. If you click **Delete,** a window will pop up where you can select to register the order as a **Lost sale** or **Cancelled**, or you can cancel the action.

How to create an independent Credit Note

Normally, a credit note will have a reference to an existing invoice; however, situations may occur in which you need to create an independent credit note.

How to create an independent credit note

1. Select **View** - **Sales/Invoicing** and **Order registration**.
2. Select **Unissued credit note** from the status drop-down list.
3. Click **New**.
4. Select the customer from the list and click **OK**.
5. In the screen that appears, you will have the option to link against an invoice, either by selecting it from the list or by entering the invoice number directly into the field for this. If this is an independent credit note, you do not link the credit note to any invoice.
6. Click **OK**.
7. Select the **Product lines** tab.
8. Click **Show product list**.
9. Select the product you want to credit and click **Insert.**
10. In the **Number** field you enter how many will be credited. Make sure that the number is entered with a negative sign, i.e. a minus sign.
11. Click the **Invoice button.**
12. Select **Credit note** and **Send to printer**.
13. Click **OK**.
14. Check the printout and close the preview by clicking **Close Preview**.
15. The **Update of warehouse** screen will appear. If all products are to be updated in the warehouse, click **Close**.
16. Answer **Yes** to invoice the order; the credit note will be posted.
17. Answer **Yes** to approve the printout, if correct.

The credit note has no reference to a previously raised invoice and can be matched/linked to open items later.

Printing a selection

You can use the filter feature for invoicing if you want to print multiple invoices at the same time, or if you want to print invoices which have not yet been printed.

How to print multiple invoices or credit notes

1. Go to **View - Sales/Invoicing - Order Registration**.
2. Open an **Unprocessed order** or **Unissued credit** note by selecting a status from the drop-down list **Status** in the upper right corner.
3. Click **Invoice**.
4. Select **Filter**.
5. Select print medium in the **Send to** drop-down list.
6. Click **OK**.
7. Select relevant filter criteria in the window that opens.

   --or--

   Click the **Filter** button to open the advanced filter options which let you refine your selection.
8. Define the common criteria for the orders or credit notes you wish to print. You can read more about the tabs in the window in the chapter "Search and Filters" in the introduction manual "Settings, Reports and Filters". Below, you can find an example of how you can use the **Advanced** tab.
   Confirm the filter by clicking **OK**.
9. Click **OK** to open a list containing all orders/credit notes that fulfil your criteria. You can limit the selection further by using the arrow buttons.
10. Click **OK** in order to print the selection.

    The selected orders/credit notes will now be printed.

How to print invoices that have not yet been printed:

When invoicing an order, you can choose not to print the invoice by clicking **No** when asked if the printout is approved. When you want to print these invoices, complete the following procedure:

1. Go to **View - Sales/Invoicing - Order Registration**.
2. Open the invoice in question by selecting **Invoice** from the **Status** drop-down list in the upper right corner.
3. Click **Invoice**.
4. Select **Filter**.
5. Select print medium in the **Send to** drop-down list.
6. Click **OK**.
7. Click the **Filter** button and open the **Advanced** tab.
8. Click **New**.
9. Expand the Sales and Invoicing category by clicking the plus sign. Expand the sub-category header **Order** in the same way. Select the option **If the invoice printout is accepted**.
10. Click **Next**.
11. Select **No/not checked** in the **Value** field. Make sure that the [=] sign has been selected in the **Conditions** field.
12. Click **OK** in order to display the selection in a list. Review the selection and click **OK** to confirm that the selection is correct.

The invoices will now be printed.

Tip! If you click **No** when asked if the printout is approved, an overview will be displayed listing all invoices that have not yet been printed. You can print the list in order to cross check the selection.

Duplicating Quotations/Orders/Invoices

By using a wizard you can duplicate a quotation, an order or an invoice to one or several of your customers. The duplication wizard starts via the **Duplicate** button in the Quotation or the Sales/Invoicing module.

How to duplicate a quotation, an order or an invoice

1. Select **View - Sales/Invoicing** and click **Quotation Registration** or **Order Registration**.
2. Locate the Quotation/Order/Invoice you want to duplicate.
3. Click on the **Duplicate** button located in the top toolbar.
4. The wizard opens and you can select which customers you want to duplicate.
   Active: The quotation/Order will be duplicated to the same customer as you are duplicating from.
   All: The quotation/Order will be duplicated to all the customers in your contact register. You can pick single customers out from the wizard from the selection.
   Query: If you select query you can specify the selections you are duplicating to.
   You can select to **Go directly to the report showing the customers which are to be included in the selection**, however this is not recommended if you have previously completed the process.
   As default **Show status reports** is marked. In the wizard you are able to print a report that displays which customers Quotations/Orders are created for. You can remove the marking if you do not want to view status reports in connection with duplications.
5. Click **Next** and follow the wizard.
6. Click **Complete** in the last step of the wizard to start generating the Quotation/Order. Be aware that this operation cannot be reversed.

   After the Quotations/Orders have been generated you can continue working with them in their modules and process them when you see it fit.

Batch Invoicing

Batch invoicing is based on several **Unprocessed batch orders**.

Contacts can be set up with batch orders as default using the **Settings** in the **Contact Register**. The **Batch order wizard** is activated by clicking the **Invoice** button. You then select one or more customers and retrieve the orders to be included in the batch invoicing.

Select the relevant orders and move them to the **Included** window using the transfer arrows. You now receive a report of all invoices that are included in the batch invoice. When these are approved, one unprocessed order is generated for each **Customer** and **Currency** from the selection. These will form the basis for further invoicing.

The **Unprocessed batch orders** that are included now change status to **Order basis for batch order**, and cannot be edited or processed. The invoicing itself takes place through the status **Unprocessed orders**.

Creating Credit Limits and Account on Hold for a Customer

If you want to create rules for which credit you want to give particular customers you can set up a Credit limit or put an Account on hold.

Credit limit is an amount limit that sets out how much credit you want a customer to have in the customer ledger. **Account on hold** is a selection, which implies that the customer should not be granted any credit in the customer ledger.

The amount limit is set through the contact card under the **Settings** tab. Click the **Customer** button and select the **Customer & Supplier Ledger tab** in the **Settings for (...)** window. In the **Customer credit** field you select the amount that will apply for the specific customer. There are also fields for Credit limits and Accounts on hold in Supplier settings.

Note! If you tick the box for **Credit limit** the amount will be irrelevant. Account on hold means that the customer will not be granted credit.

By default, Credit limits/Account on hold works in the following way for users that are not super users

The credit limit that is given is checked against the outstanding amount in the customer ledger. Unprocessed orders that are already registered will not be included.

When creating a new sales order, invoicing a sales order or delivering goods, the user will receive a note that the customer has passed the credit limit, or that the customer has their account on hold. It will not be possible for the user to complete the operation.

Access for using Credit limits and Accounts on hold

Credit limit and Account on hold setting are controlled by the Access controls. By applying these, the system administrator can decide whether certain users will be able to override these settings.

Under Sales/Invoicing in Access templates you can find the following access control:

Creating sales orders for customers that have exceeded the credit limit or have their account on hold: With this access control activated it is possible for users to create sales orders, even if the customer has exceeded the credit limit or has their account on hold. The user will be warned that the customer has exceeded the credit limit or has their account on hold, but can still select to create the order.

Note! It is still not possible to deliver the products, or to invoice the order. To be able to make a delivery or invoice, the customer's outstanding amount must be lower than the credit limit. When this is exceeded, you must change the Credit limit, remove the Account on hold selection or reduce the customer ledger in order to make the delivery and to invoice the order.

Specific to single-user installations/super users

If you are named as a **Super user** in your User profile the option that allows you to create the sales orders will be active by default. You are able to create a sales order despite of Credit limits/Accounts on hold. In a single user installation one user will be the super user. The Credit limits/Accounts on hold functions work differently for single users.

If you want to prevent yourself as a single/super user to create sales orders in the same way as described above you will have to create a separate user that you can then link to an access template.

Tip! You can search for customers with accounts on hold: In contact management, click the **Search** icon in the toolbar. Click **Multiple criteria**, and select **Customers with accounts on hold** from the **Extended** tab. You can also print a **Contact list**. In the report selection screen you can select the report to display **Customers with accounts on hold** from the **Extended** tab.

Printouts and Reports

Order and Warehouse Reports

You can click the **Print** icon in the order registration screen to print various reports from the order.

You can select between a variety of reports to suit your company. You can print sales order confirmations, a picking note or a delivery note.

Note! You can only select one report at a time.

Filter

As default the order that is active is selected i.e. the order you worked in when you clicked the **Print** button.

You can select several orders at once by selecting **Filter**. A screen opens and you can choose Print criteria to select what orders to print.

Note! Note that you can make selections based on the **Our ref**. field, making it possible to only print orders you created yourself.

You can also use the filter button to access the regular selection screen where you select more advanced selection criteria. If you select **All**, all of the items will be printed. Be aware that all items can be a large and time consuming print job.

Printers

The program sends the report to the **Printer**. Your default printer is usually selected however you can activate the **Select printer** check box. The print dialogue will open where you select printers installed on your machine or the network.

If you select to send the report to **Preview** the report will be displayed on the screen.

You can also print to e-mail or fax, if you have a fax printer installed.

You can select the number of **Copies.** One (1) means that One (1) document will be printed.

How to add Fixed text to an Order or Invoice

Fixed text that will be used on invoices first has to be entered in the **Properties Register**. You then select this text when you create an order.

How to retrieve fixed text when creating an order:

1. Create the order.
2. Select the **Text** tab before you process the order.
3. Click the search button to the right of the **Select text** field.
4. Select the fixed text.
5. Click **Insert.**

   The fixed text has now been inserted into the order.

Note! If you want the text to be included on one or several orders that are created you will have to enter each one of them and repeat the points from 2 and out.

If you want this text to be included on newly created orders every time, you can do the following:

How to select fixed text to always be included on newly created orders:

1. Select **View - Settings - Company - Settings per Module - Sales and Invoicing**.
2. Enter the text in the **Fixed text, order** drop-down list.

   The text will show on new orders automatically.

Printing an Invoice in a Foreign Language

A contact can be set up to receive communication, including quotations and invoices from you, in another language. Products can also have their names registered in other languages, so you can add them to foreign customer communications. If the language has been set for the contact, this will happen automatically.

How to set up a contact with another language

1. **Open** the contact's Contact Card.
2. Select the **Other info** tab.
3. Select the relevant **Language** from the drop-down list.

   This language will be transferred to new orders from now on.

> **Note!** If an order or quotation was created **before** the language settings were made in the Contact Card, the order will still be printed in the language of the company database.

If the contact is not set up for a certain language or the contact's language changes after the order was created, you can still print documents in any language you select.

How to print an invoice in another language

1. Select **View** - **Sales/Invoicing** and **Order registration**.
2. Create a **New order** or select an existing unregistered order.
3. Select the **Miscellaneous** tab.
4. Click **Reports** and select a language e.g. Norwegian.
5. Click **OK**.

   When you invoice the order the invoice will be printed in the selected language. If you created a product name in this language the product names will also be changed.

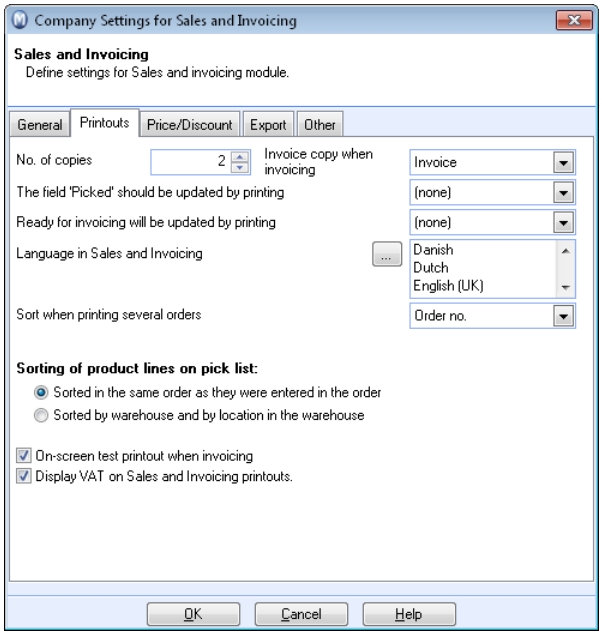
Printing Invoice Copies

Through company settings you can specify how many invoice copies you want to print out when invoicing.

> **Tip**: You can also edit posted invoices. Read more in the introduction manual "Financials, Logistics and Human Resources" under "Accounting".

How to decide invoice copy numbers

1. Select **View** - **Settings - Company**.
2. Go to the **Setting per Module** and click **Sales and Invoicing.**
3. Select the **Printouts** tab.



4. In the **No. of copies** field you can select how many copies you want to print for each invoice.
5. Click **OK**.

Next time you invoice you will have the selected numbers of invoices printed out.

Currency

Using Foreign Currency on Orders/Invoices

The currency that is registered for a contact will also be the prevailing currency on orders created for that contact. For example, if the contact uses USD, the currency on the order will automatically be USD as well. If you select a different currency for the order than you have for the company database (which you fixed under **View** - **Settings - Company - Financial Settings** and which is also the currency for your product prices), you will first need to update the exchange rate for the currency on the order. After you have done so you can enter the products under the **Product Lines** tab on the order card. The program will automatically convert the product price from the product's currency to the currency of the order according to the exchange rate you determined in the currency register.

It is important that you at all times remember to update the exchange rate before you enter the products into an order. If you update the active currency rate after you have added the products to the order, the product price will not be updated automatically. If, for example, you add a product to the order, re-open the order later to add another product and want to update the price for the product you entered first with the new exchange rate, you will need to update the rate in the currency register and then add the product to the order once more. Only this way will guarantee that the product's converted price is being calculated based on the latest update exchange rate.

Clicking on the search button to the right of the **Currency** drop-down list will open a window displaying all registered currencies.

Directly click into the **Exchange rate** to edit the rate that is registered already and in this manner, make the changes you require.

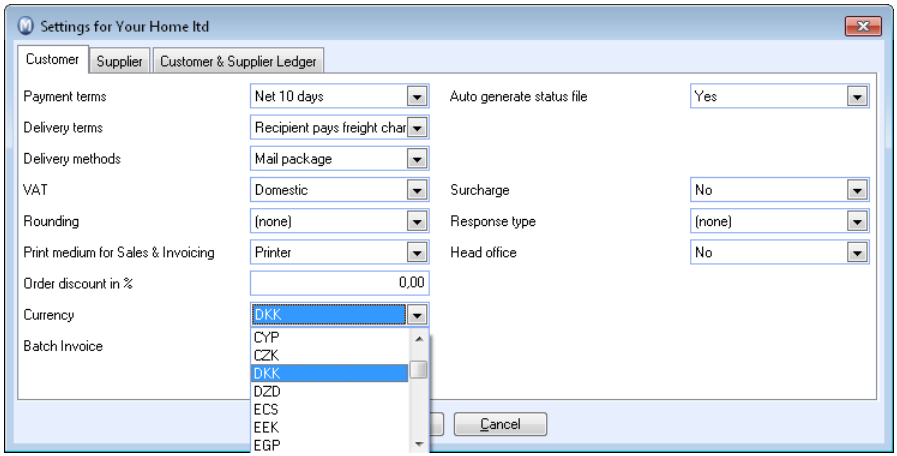
Invoicing in the Customer's Currency

Sometimes you want to be able to invoice the customer in their own currency. If the customer is always to be invoiced in their currency you should select the currency in the customer's contact card. In some cases you might want to override the currency directly in the order.

The program will convert the postings to your local currency; you will however be able to enter the items in the relevant currency. Therefore, it is important that you keep the currency exchange rates updated. The currency register is located under **View - Accounting - Currency**.

The following settings apply if the customer is invoiced in their own currency

1. Select **View - Contacts - Contact Management**.
2. Select the customer using the List button or the blue arrows.
3. Select the **Settings** tab.
4. Click the **Customer** button and select the desired currency in the **Currency** field.



All new orders for this customer will now have this as the default currency.

How to override currency

1. Select **View - Sales/Invoicing** and **Order Registration**.
2. Select **New** to create an order.
3. Select the desired currency in the **Currency** field.

The currency you selected will be applied to the order.

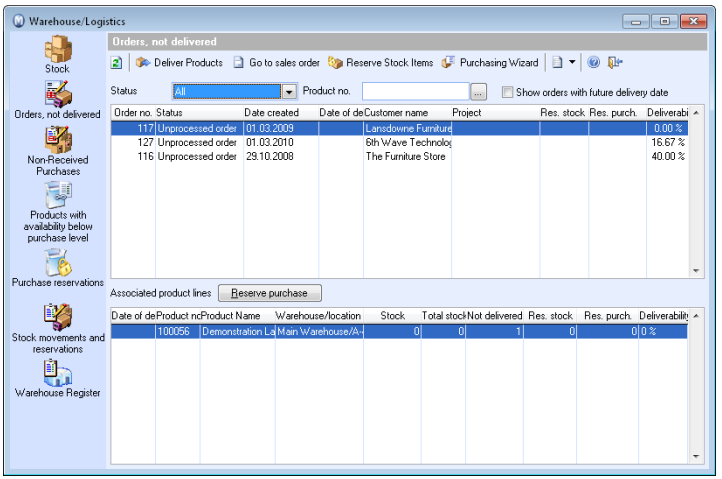
Purchase and Warehouse

Delivering Products

An expedient way of delivering products is by clicking **Deliver Products** in the **Product & Warehouse** focus area. If you choose this method, you will be able to choose from a list displaying **Order number** and contact **Name**. You also have the possibility to deliver products via the warehouse module, from the **Orders not delivered** window. This method gives you more detailed information regarding order lines as well as shortcuts to any existing purchase reservations and the purchase wizard.

How to deliver products

1. Go to **View - Warehouse - Warehouse - Orders, not delivered**.



2. Select an order at the top of the window for which you will withdraw one or more items from the warehouse to deliver to the customer.
3. Click **Deliver products**.
4. Change the figure under To be delivered if not all of a product is to be delivered from the warehouse. If all available products are to be delivered, click **Update all available products with 'to be delivered'** to automatically adjust the figure in the **To be delivered** column. If not all products in the order are to be delivered, a backlog is created when the order is invoiced.
5. You can select one or more pick lists and packing lists for printout if required. Adjust the date for Picked, Packed and Sent if they do not have the current date.
6. Click **Print and update warehouse**.

The stock and 'to customers' are automatically adjusted.

If you are delivering a product marked as **Required serial number for receiving goods and withdrawing goods** in the **Settings** in **Product Register** tab and you have selected **Serial number must be picked manually** in Company settings for Product/Warehouse handling, a screen will appear in which you have to select the unit (serial number) of the product that is to be delivered.

Tip! You can register the delivery of products in an order and print the related reports **Pick list** and/or **Packing list**. This is an alternative to updating stock and printing reports from the Sales and Invoicing module.

Tip! If a customer has exceeded their credit limit, you will not be able to deliver any products to them. The outstanding payments must be reduced first, or the credit limit will need to be expanded on the contact card.

Backorder

An order can have the status **Backorder**. This means that components of the order have been delivered and invoiced.

A backorder is generated when you choose to change the quantity to be delivered and then invoice the order. The backorder is handled as a new order. The original order number will be displayed on the printout when printing a backorder.

In order to change the quantity, enter the new amount in the **To be delivered** field in Sales/invoicing. The backorder which is created when you invoice the order can be found by selecting **Backorder** from the **Status** drop-down list.

In order to use the functionality, you must make sure that the box **Do not invoice before all products on an order have been delivered** is un-ticked in the company settings for Sales and Invoicing.

Price and Discount

Prices and discounts are transferred from the order to the backorder. Quantity discounts will also be transferred in order for the backorder to retain the same discount as the original order.

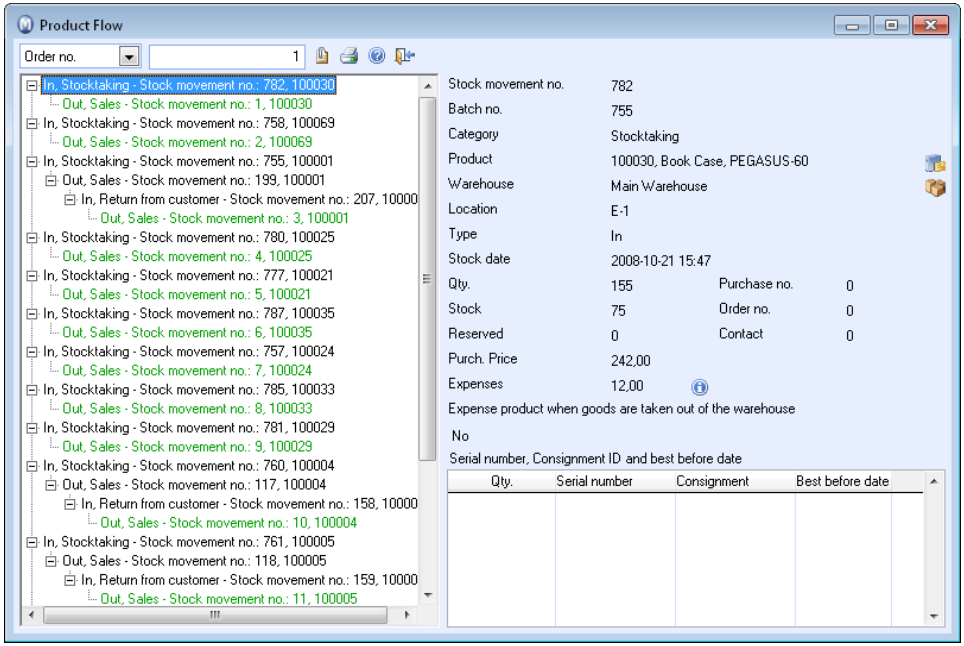
Note! Please note that the quantity discount will not be recalculated in relation to quantity. If you want to recalculate it, click **Regenerate Order Lines** and choose to include discounts. You will thereby calculate the quantity discount in relation to the quantity on the backorder and not in relation to the original order.

The Product Flow Window

The product flow window gives you complete control of all stock movements. The window lets you track those transactions which caused the stock movement as well as locate the journal entry in the Nominal ledger, if an entry has been registered. You can access the window from the **Stock Movement and Reservations** view in the **Warehouse** module.

You can also open the product flow window from **Sales/Invoicing** and **Purchases** in the **Product Lines** tab.

The window lets you track those transactions which caused the stock movement as well as locate the journal entry in the Nominal ledger, if an entry has been registered.



The Toolbar

By using the two fields in the top left corner as filters, you will be able to view the relevant movements. Use the fields to define what kind of movement you want to view and the number of the movement. If you choose **Entry no.**, you will also be able to select the accounting year.

List: Opens a list of Orders or Purchases.

Show Journal list: Displays all journal entries linked to the displayed movements. If a movement has been registered, you have the possibility to open the journal entry linked to a given movement by highlighting it in the list and then clicking the icon in the bottom right corner of the window.

Print: Opens the printout window from which you can print reports on stock movements with or without journal entry information, based on the selection you made in the product flow window.

The Left Side of the Window

Stock movements are displayed in a tree structure in the left of the window. You can thereby track the information both "ways". Highlight a stock movement in the field to the left in order to view updated stock movement information in the field to the right.

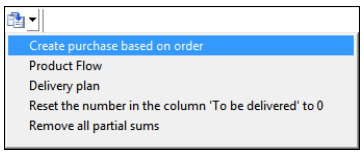
The Right Side of the Window

In the window's right half, you will be able to view detailed information regarding the stock movement highlighted to the left. The buttons will only be available if the related items have been linked to the movement.

You can find more information regarding the buttons within Help (F1).

Delivery Plan

In the order registration window, you can view purchase and delivery information related to the products in the order. The overview is displayed in the Delivery Plan window and contains purchased products which have not been received.



Open the delivery plan window from **Product Lines** tab in the Sales and Invoicing window. Click the arrow button to the right of the button and select **Delivery Plan** from the drop-down list.

> **Note!** The button may have different names depending on which functions have been activated.

Order Number, **Contact** and **Order Date** are displayed at the top of the window.

Product Lines

The window's top half displays order details, including delivery information.

List of Non-received Purchases

The bottom of the window displays a list of non-received purchases of the product highlighted in the window's top half.

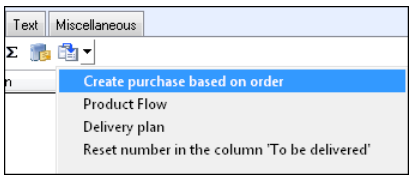
You can navigate directly to the purchase by clicking the icon in the bottom half of the window. You can also double click the list entry to open the purchase.

Creating Purchases based on Sales Orders

You can create purchase orders based on sales orders if you have activated the functionality in the company settings for product.

When the customer orders products you can create a purchase based on a sales order. A wizard will help you with this. Before the purchase order has been transferred to the status Purchased, you are able to accumulate the quantity in new purchases based on sales orders from the same supplier.

Start the wizard from the **Product line** tab on the sales order. Click the arrow to the far right and click **Create purchase based on order**. If you cannot find this option, you will first need to select that you wish to use this functionality in the company settings for product.



Tip! If you do not have this option, you must first activate the functionality in the company settings for product.

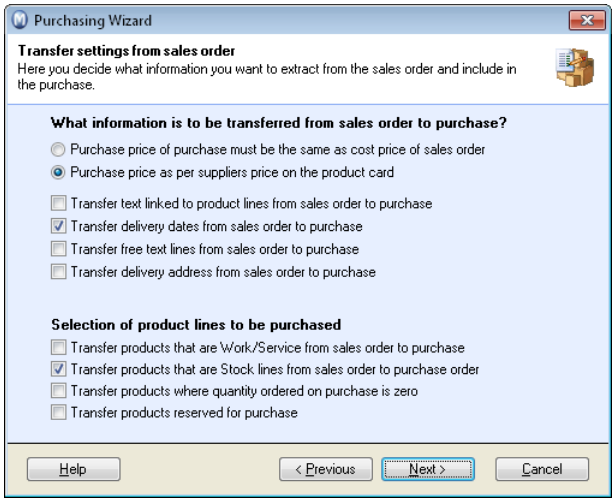
The wizard consists of 3 steps:

Step 1

Select whether to purchase the products from the default supplier or another supplier and click **Next**.

Step 2

In this window you select which information you want transferred from the sales order to the purchase.



What information is to be transferred from sales order to purchase?

Select whether the purchase price for the purchase should be set equal to the cost price in the sales order or retrieved from the product card.

Select the check boxes for the information you want to transfer from the sales order to the purchase. If you select to combine several product lines on the sales order against the same product, it is not possible to transfer information from each individual product line.

Selection of product lines to be purchased:

Select the check boxes to select which product lines are going to be purchased. You can select whether products that are Work/Services and Stock items are going to be purchased, and whether products, where quantity ordered on purchase is zero are to be transferred.

Step 3

You have now completed your selections and made all the settings for the purchase order proposal. Tick the box for **Automatically add all products from the selection in suggested purchase** if you would like to enter the product lines into the purchase order proposal automatically. If this box remains blank, the selection will come up empty and you can enter the desired product lines manually. The original sales order continues to be displayed in the background.

Once you are finished, click **Complete** to execute the selections/settings and continue in the **Products to be purchased** window.

Note! If you click **Cancel** the Filter settings will not be stored.

The **Products to be purchased** window is displayed inactively in the background until you have made the necessary settings for the purchase proposal.

Prices and Discounts

Product Pricing

Price handling provides great flexibility in determining sales prices and maintenance of the purchase and sales prices in the product register.

Tip! In the company settings for product - in the **Default Values** tab - you can define default values which will be used automatically when you register a new product. These settings will be used for all new products. Already existing products can be edited by using the **Price Adjustment** feature.

Sales price

A product's sales price is in the field for **Sales price** via the **Price** tab in the product register. If you have activated the company setting **Company wants to track the price history for products** you must first click **New**. You can enter the amount in the **Excluding VAT** column or in the **Inclusive VAT** column. The system will calculate the VAT amount and enter it in the opposite column.

You can use different prices for different periods, e.g. a campaign that runs for a limited period. If you use differentiated prices you should activate the display of price history in company settings for product.

You can also use the **External Price list** to show adapted prices, which apply to one particular customer or to a selection of customers.

Discounts

You can offer various discounts to single customers or a selection of customers. Discounts can be given as quantity discounts, as a percentage or as a nominal value.

You activate the usage of discount deals for individual customers for single products, quantity discounts and discount for customer categories through company settings for product.

To simplify the maintenance of discounts you can predefine prices and discounts for a variety of combinations of customer categories and product groups through the Discount register.

Mamut Business Software includes functionality for **Early Payment Discounts**. This means that customers who pay before the due date stated on the invoice can be offered a discount. The reason for this is to give the customer an incentive to pay on time and thereby ensuring your company's profit margins and cash flow. The early payment discount can be set up in two levels in the **Properties Register**. The basis for the discount is the product price including VAT. This means that the discount will reduce the VAT.

Surcharges

In addition to the ordinary sales price you can add a surcharge. You will have to activate this in the company settings for product. The surcharges are registered in the **properties register** under Surcharges. These can be calculated as unit price, price per unit weight, price per unit volume or as a % of sales value or % of cost price.

Cost price

If you want to estimate gross profit etc. you will have to register the **Purchase price**. This can be entered directly or be estimated on the bases of the purchase prices in the **Supplier info** tab.

In addition to the purchase price, expenses such as freight, duty etc may apply. They can be registered in the **Expenses** field. Together, the purchase price and expenses make up the product's **Cost price**.

With two ways of registering extra cost for purchasing, i.e. posting Duty/Freight invoice or post freight and handling directly in the supplier invoice, available, you can select whether these two types of expenses will be included in the cost price. You will find the selections for this in company settings for product.

The Cost price field is automatically calculated as the sum of the purchase price and expenses.

Price Changes

The sales price can be changed directly in the product card. If the sales price is changed manually, you can decide that this will update the price calculated in % or by a fixed gross profit. The default setting is that a change in the sales price does not change the cost price, only gross profit.

The wizard for **Price adjustment** makes it possible to adjust the prices for a group of products in one operation, as well as fixed sales prices in different currencies.

You can choose whether the purchase prices will continuously affect the sales prices and if so, how it will be updated. If you want to estimate gross profit manually, you can do this directly through the **Price calculator** without further settings. You can also automatically update the sales price in the following ways:

- Changes in cost price will affect sales price, fixed gross profit in %
- Changes in cost price will affect sales price with a fixed gross profit

If you do not want the changes in cost price to affect the sales price, you can let the changes in cost price influence gross profit and the sales price remain unchanged.

You can select that the purchase prices will update the purchase prices and expenses in the product card when the purchases are posted. This selection is activated through company settings for product.

Note! Be aware that if you update both cost price at posting and leave cost price changes to influence sales price then sales prices will automatically change when purchasing is posted.

Prices in different currencies

On a product's product card you can enter fixed sales prices in one or more different currencies. These prices are fixed for a single product and you can individually define them according to your company's needs. In addition to this, you can adjust fixed sales prices with the **Price adjustment** functionality. Fixed sales prices in different currencies have to be activated via the company settings for products.

If you do not want to enter a fixed sales price for a product, you can nevertheless create orders in different currencies. If you add a product to a sales order in a different currency, the product's sales price will be re-calculated based on the actual sales price in company currency and the exchange rate defined in your Currency Register.

In order to add a product with a sales price in a different currency to a sales order, the order has to be set to the currency: If a customer has defined a different currency on his contact card, new sales orders will contain this currency per default. Furthermore, you can change the currency directly on one particular sales order.

Settings

In User Settings for Product you decide what is to be displayed in the screen. You can also make selections that will simplify the registration process.

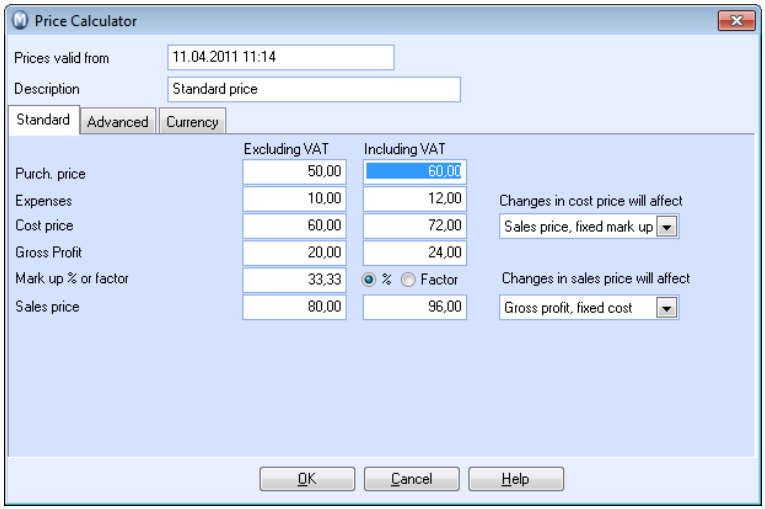
Company Settings control the manner of program usage for all users.

How to change/edit the Product Price

The **Price Calculator** is used when you want to calculate the optimal retail price for a product, when you want to set prices determined by date and when you want to enter fixed prices in different currencies.

Adding/editing the default sales price in company currency

The **Standard** and **Advanced** tabs within the Price Calculator help you to find your optimal sales price, i.e. by calculating the cost price, gross profit and retail price. You can experiment with different prices and gross profit margins, making it easier to optimise the combination.



How to add/change the price for a product

1. Open **View - Product - Product Register**, tab **Price**.
2. Is the company setting for products **Company wants to track the price history for products** under **View - Settings - Company - Settings per module - Product** activated? If so, then select the price line and click **Edit** to edit an existing price. If you want to add a new price, click **New**.

   If this setting has not been activated? Then click the button **Price Calculator** in order to change the existing product price. You cannot add further prices.
3. Enter **Date** and **Time** in the **Prices valid from** field.
4. Then enter a **Description** in the field below, for example "autumn sales". It is not mandatory to enter anything in this field.
5. In the **Standard tab** you can enter the most common price adjustments while in the **Advanced** tab you can perform more advanced calculations.

   Enter the **Cost price**, **Expenses** in terms of labour, warehousing, transport etc. The **Cost price field** displays the **Purchase price** and **Expenses**.

   Gross profit can be entered as either a **Factor**, **Amount** or as a **Percentage**. If you enter an amount the percentage is automatically calculated. Furthermore, if you enter a percentage or a factor the amount is also calculated automatically.

   Note! If you make changes to the **Cost price** or **Gross profit** you must select how this will influence the price calculation. You do this in the drop-down list to the right of the window.
6. Click **OK**.

   The new price is now being saved.

Fixed prices in different currencies

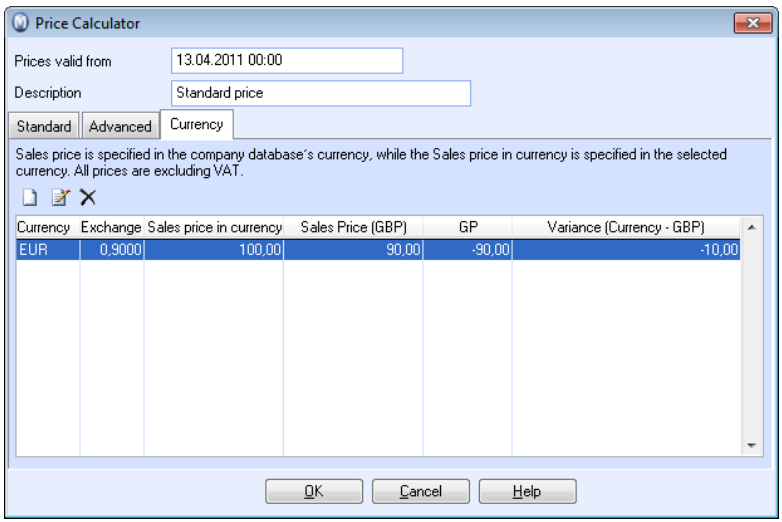
Under the **Currency** tab, you can add fixed sales prices for products in one or more different currencies than the company currency. You can, for example, define a sales price in Euro which is individually adjusted to the continental market.

Settings

To activate the setting for fixed prices in different currencies, open the company settings for products. Make sure the check box **Company wants to track the price history for products** is activated and then select **Company sells products with fixed prices in different currencies**.

In the Currency Register under **View - Accounting - Currency**, the check box for all currencies you want to add fixed prices for, has to be activated in the column **Show**.

Note! A fixed price in a different currency on product level is independent from the exchange rate defined in the Currency Register. Nevertheless, you should always have an updated Currency register with actual exchange rates for all currencies you trade with. The exchange rate is also displayed on the **Currency** tab in the Price Calculator and influences the values displayed in several columns. It helps you to get a proper overview of e.g. the **Variance** between the foreign currency and your company currency.



How to enter fixed prices in different currencies

1. Open the product you want to add a fixed price in a different currency for via **View - Product - Product Register**.
2. Select the price line with the correct company price on the **Price** tab. Click **Edit**.
3. Open the **Currency** tab and click **New**.

4. Select the **Currency** from the list and enter the sales price in this currency under **Sales price in currency**.
5. Click **OK** to save the new sales price in the different currency.
6. You can now find the new sales price in the list of the **Currency** tab.

   Tip! It is possible to see how much the Sales price in the different currency differs from your sales price in company currency (column **Variance**). A negative value indicates a lower sales price in the different currency. Furthermore, you will find the Gross profit (**GP**) and the new Sales price both in the different currency (**Sales price in currency**) and re-calculated into your company currency (**Sales Price (<company currency>)**). All this information will help you to find the correct sales price.
7. If necessary, adjust your sales price via **Edit**
8. To save the sales price, click **OK**.

   You have now defined a fixed sales price in a different currency. You will also find the fixed sales price on the Price tab of the Product card, below the respective sales price in company currency .

Changing Prices for a Selection of Products

Here you can adjust **Sales price, Purchase price, Expenses** and **Gross profit** for several products at once. Create the filter first, and then select which prices to adjust for the selection.

Note! This price adjustment cannot be undone. The products will be changed according to your selections.

How to change the price for a selection of products

1. Go to **View - Product - Price Adjustment**.
2. Set a filter for the products to adjust and click **OK.**
3. The settings for price adjustment window will open. Select whether you want to adjust the **Sales Price**, the **Purchase Price**, the **Expenses** or the **Gross Profit**.

   Note! If you want to adjust the **Sales Price** for fixed prices in foreign currencies, make sure you choose the correct **Currency** from the drop-down list. Please ensure that you have defined the appropriate settings in order to use this functionality. You can also perform a price adjustments for **All** currencies at once, but in this case you can only adjust the percentage in step 4.
4. Decide whether to use **Percent** or **In company currency**.
5. Select the date for the adjustment to take effect, within the field for **The new prices take effect on**.

6. Select **Rounding rule for changed prices**.
7. Tick the check box, if you want to **Update prices of bundles** by adjusting the components' prices. Note, that you cannot adjust product bundle prices directly via the price adjustment functionality.
8. Select the **Recommended retail price** tab.
9. As for the price, the **Recommended retail price** can be adjusted in **Percent** or **In company currency.**
10. Click **OK**.
11. If you have changed a price in company currency, compare the results with the original prices, and correct errors for the products if necessary.

    The original price information for the selected product is shown at the bottom of the window, to help you evaluate the changes before they are completed.
12. Click **New criteria** if you want to decline and return to the **Settings for price adjustments** window.
13. Click **Complete**.

    The changes are now executed.

Discounts

In Mamut Business Software there are a number of different types of discount. These discounts are structured in a hierarchical system which overrule each other. This means, for example, that discount no. 6 can be overruled by discount no. 5 and so on. In this way, only one discount will be applied in the end. Therefore, if you have registered a fixed price on a product for a customer, the discount will be applied on top of - or in addition to - this price, if the customer is also associated with some other product discount.

The Discount Hierarchy in Mamut Business Software

1. Manual Discount

This discount type is entered directly on the order's product lines and overrules all other discounts in the hierarchy.

2. Discount on a Combination of Product and Contact

The discount is created in the **Discount** tab in the product register.

3. Default Discount in % of Order Total for a Customer

Registered as default discount in the **Settings** tab in the contact management register which can be accessed via **View - Contacts - Contact Management**. Click the **Customer** button and enter the **Order discount in %**. Read more about this in the chapter "Contact Management".

4. Discount on a Combination of Product and Category

The discount is registered in the **Discount** tab in the product register.

5. Discount on a Combination of Category and Product Group

The discount is created in the **Discount Register**, accessed via **View - Product - Discount Register**, or by clicking the **Discount Register** button in the product register tool bar.

6. Quantity Discount

This is a special type of discount which can be both included in, and independent from, the discount hierarchy. For example, you can choose to define the quantity discount as a discount that is in addition to other discounts. Activate this setting by selecting the check box **Quantity discount is in addition to other discounts** in the tab **Price/Discount** in the company settings for sales and invoicing. There are also a number of other factors affecting the discount hierarchy. Read more about this below.

You can manage all of these discount types from the **Discount** tab in the product register. The only exceptions are discount no. 1 which is defined directly on the order and discount no. 3, which is defined in the contact management register. Read more about this in the "Product" chapter.

Settings

Even if you are working with the discount hierarchy in Mamut Business Software, there are a number of exceptions and settings which can overrule the hierarchy. These settings can be accessed via **View - Settings - Company - Settings per Module - Sales and Invoicing -** the **Price/Discount** tab.

The highest discount overrules the discount hierarchy: Select this setting if you wish to offer your customer the highest possible discount. If you activate the setting, the discount hierarchy will be overruled.

Quantity discount is in addition to other discounts: By activating this setting, any quantity discount will be added in addition to discounts from the discount hierarchy. The quantity discount cannot be overruled by other discounts you may wish to create.

If you select both check boxes, the highest discount will overrule the discount hierarchy and any quantity discount you wish to give will be added in addition to the highest discount. If you do not select any of the two check boxes, the discount hierarchy will function in the normal way. Read more about the hierarchy above.

More information about other settings in the tab can be found in the "Sales Follow-up" chapter.

Note! A discount will not function if the price is lower than the discount.

You cannot add two discount % to the same invoice. You must instead create a discount for the product from the product register, in the **Discount** tab where you enter the discount as a fixed price.

Early Payment Discount

Early payment discount is a payment term which gives you the possibility to give a discount to customers who pay before the due date stated on the invoice. The reason for this is to give the customer an incentive to pay on time and thereby ensuring your company's profit margins and cash flow.

Discount in the Webshop

The only discount available in the webshop can be defined in the company settings for products. The setting can be found by clicking **View - Settings - Company - Settings per Module - Product** and selecting the **Price processing** tab.

Tip! If you wish to offer individual discounts for each customer or customer group in the webshop, you must purchase a licence for the Mamut Enterprise Extension PartnerWeb. Read more on our website: www.mamut.co.uk.

Read more about settings and prices on your website and webshop in the "E-Commerce" chapter.

Supplier discount - Purchase discount

It is also possible to enter the discount you *receive*, when purchasing from your suppliers. To do so, go to **View - Contacts - Contact Management** and open the supplier for which you want to set a discount. Select the tab **Settings** and click on the **Supplier** button below. Enter the discount in the **Agreed discount %** field under the **Supplier** tab.

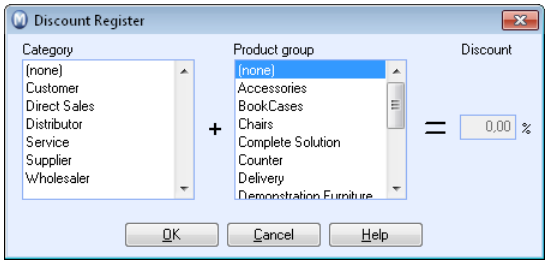
When linking products to suppliers you can set supplier discount for single products as well. You can do this by clicking **View - Product - Product Register**. Open the product for which you want to set a discount, and then open the tab **Supplier**. Click **New** to link the product to a supplier, and select the supplier from the list. If the product is already linked to the supplier that the discount applies to, select the supplier and click **Edit**. Enter the product discount in the field **Discount percentage on purchase**.

Note! This discount type overrules the general supplier discount which you have set in the contact register.

Tip! You may also choose to enter the supplier discount manually in the purchase line when you register a purchase. Read more about purchases in the "Purchasing" chapter.

The Discount Register

% The **Discount register** is a discount matrix where you can predefine prices and discounts for various combinations of customer categories and product groups. To get to the discount register, select **View - Product - Discount Register** from the menu, or click the **Discount register** button in the product register toolbar.



In the **Discount Register**, select a category and a product group and enter the discount rate that will be applied to this combination. This discount type has the lowest priority if the discount hierarchy is not overruled by the setting **The highest discount overrules the discount hierarchy** found in the company settings for sales and invoicing.

Tip! You can choose to apply discounts for individual products for customer categories and/or individual customers by defining the setting in the company settings for products. You will then be able to enter your own discounts for each individual product which will apply to the various customer categories or customers. Enter the discount into the product register, in the **Discount** tab.

Delivery and Payment Terms

Delivery and payment terms are created and edited in the **Properties Register**. The Program comes with a set of pre-defined delivery and payment terms.

The due date for an invoice is controlled by the payment terms. Usually, the due date cannot be changed after invoicing but should you wish to allow changes to the due date after that, you can specify this in the payment terms.

Tip! When you create an order you may specify how much you are invoicing in the **To be delivered** field. This allows you to print partial invoices if only part of an order is to be paid for.

Changes to your terms

Delivery and payment terms can be decided for the entire company database so that you can set default terms and conditions to apply for all contacts. The terms and conditions are set in the company settings for contact management. Please note that these settings then only apply to new contacts you create after making the settings.

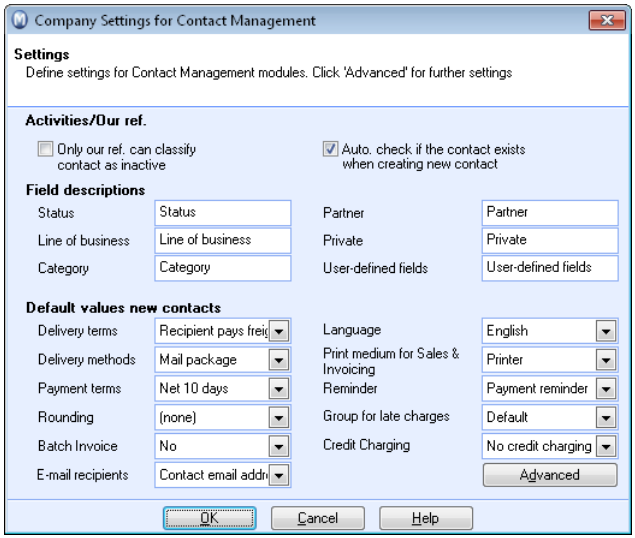
Additionally, it will also be possible for most settings to override the company settings for a single contact and for orders/invoices.

If you would like to change the terms and conditions for several contacts, you should still first change the company settings, so that all new contacts being created will have the correct settings. After that you can use the **Change values for a selection of contacts** function to update already existing contacts.

Example: Determining the Payment terms for all new and existing contacts:

A: Settings for all new contacts:

1. Go to **View - Settings -Company - Settings per Module - Contact Management**.



2. Select your preferred payment term from the **Payment terms** drop-down list.

   All new contacts will be set up with the selected payment term.

B: Updating existing contacts registered as customers:

1. Go to **View - Contacts - Change Values for a Selection of Contacts**.
2. Select **Simple selection** and click **Next**.

   If you would, for example, like to change values for contacts with a specific payment term only, you can do so via the **Advanced selection** option. You can find more information on **Advanced selection** in a separate section.
3. Select the **Default** tab and click the **Customer** box.

   Please note that you have the possibility here to update Suppliers and Customers, Suppliers, Partners, Private and Head office individually or together. The company settings, however, will apply to all new contacts.
4. Click **Next**.
5. Select **change status fields/other contact information** and click **Next**.
6. Open the **Customer settings** tab and select your preferred option in the **Payment terms** field.
7. Click **Next**.
8. Select whether you want to generate a report listing the changes you made. This report can be printed to the screen or directly to your printer. If you decide to generate the report, you will return to the wizard once you close the report.
9. Click **Complete**.

   The changes that you have made cannot be undone.

C: Overriding at Order level

If you have orders that were created before you made your changes, you can make the changes directly on the order. You can also use this method if you want to override a single order regardless of whether you made setting changes.

1. Go to **View - Sales/Invoicing - Order Registration** and browse for the relevant order.
2. Change the **Payment terms** by selecting the option you want from the drop-down list.
3. Save the changes.

   The changes are saved and override the company settings for this order.

D: Overriding at Contact level

You can also override the setting for individual contacts:

1. Go to **View - Contacts - Contact Management** and browse for the contact you want to change.
2. Open the **Settings** tab.
3. Change the **Payment terms** for **Customer** or **Supplier** according to your new preference.
4. Save the changes.

The payment terms will now override the company settings for new items being created for this contact.

How to create a new Payment Term

In the **Properties Register** you can customise existing payment terms and create new ones to match your requirements.

How to create a new payment term

1. Go to **View - Settings - Company - Properties Register**.
2. Select **Payment Terms**.
3. Click **Edit**.
4. Click **New**.
5. Make the settings that are to apply to the payment term here.
6. Click **OK**.

The payment term is created and available for selection throughout the program.

Subscription Invoicing

Mamut Enterprise Subscription Invoicing is a tool for invoicing customers with fixed agreements or subscriptions. The solution is included in Mamut Enterprise E5.

You now have the possibility to invoice customers that have fixed agreements or subscriptions with you. If you regularly invoice the same customer for the same products and/or services you can now invoice these in one simple operation including invoices for periods ahead. The revenues will be posted automatically - with the right date and in the right period.

You create the subscriptions, which customers can consequently be linked to, in a separate Subscription register. A subscription can be created for products and services with specifically defined prices and discounts and you can make settings as to how the system should handle the subscription regarding the frequency for sales order creations.

The module allows you full control and overview over which customers should be invoiced for which subscriptions/agreements and how often.

Important! The function needs to be activated. Go to **View - Settings - Company - Settings per Module - Sales and Invoicing** and select the **General** tab. Select that you want to use subscription invoicing by ticking the box for **The company uses subscription invoicing**. You then need to restart the program.

Note! For some program versions, the function is only available as an additional product. Contact your software supplier to find out whethe2r the function is available for your version of the program.

Subscription Register

The module consists of a **Subscription Register**, where you create the various subscription types/agreements your customers can then subscribe to. The subscription can be set up with products and services with specifically defined prices and discounts and you can select settings as to how the system should handle the subscription.

The subscription is given a frequency, which governs when/how often an order, based on the customer subscriptions linked to it, will be created. It is also possible to edit existing subscriptions in the register and to set subscriptions to 'stopped' status, should you need to. When a subscription is made inactive the customer subscriptions connected to it will no longer show in the customer subscription register and no more orders that are based on these customer subscriptions will be created.

Customer subscriptions

A Customer subscription is an agreement with an individual customer. The subscription is linked to the subscription register. If you wish to invoice a customer based on a subscription, you must link the customer to the subscription in the customer subscription register. **The Customer subscriptions register** displays which subscriptions customers are linked to. From this window, you can link customers to subscriptions and you can edit existing customer subscriptions as well. You can also set/change an end date for a subscription, pause a customer's subscription or terminate it altogether. You can set a start and, if you wish, an end date for every single customer subscription as well as specifying the frequency governing how often/when the customer subscription can be 'run', thus creating an order, from which you can invoice. It is possible to terminate a customer subscription by changing its status to 'stopped', or you can 'pause' it, e.g. if the customer wants a break from deliveries/invoicing. Customer subscriptions put on hold/paused or stopped can be re-activated at any time.

Create Sales Orders and Invoice them from the Sales/Invoicing Module

You have the opportunity to select which subscriptions and customers should form the basis for sales creation in the function-specific wizard for the creation of orders for active customer subscriptions. Your selection can also include the point in time that orders should be created. Once you have made your selection, you will be presented with a list of all customer subscriptions to be included in the order run, giving you the opportunity to remove from the list any customer subscriptions you do not wish to include this time. These removed subscriptions will then be proposed again in the next run. You can also place the selection date back in time, if you would first like to create orders for customer subscriptions that should have been executed previously. After this, you can initiate another order run based on a new date.

Frequency

Each subscription can be linked to a frequency, which determines when/how often the subscription can be 'run', that is to say how often each customer subscription can form the basis for the creation of a sales order. The frequency is handled by the Properties register, which you can open by clicking on the **Frequency register** button in the toolbar up top in the **Subscription register** window or by going to **View - Settings - Company - Properties register**. You can create new frequencies for a set date every month or every x number of days, respectively.

Report

You can print the **Future subscription invoices** report, showing which orders you will be able to generate and invoice for in the future based on existing active customer subscriptions.

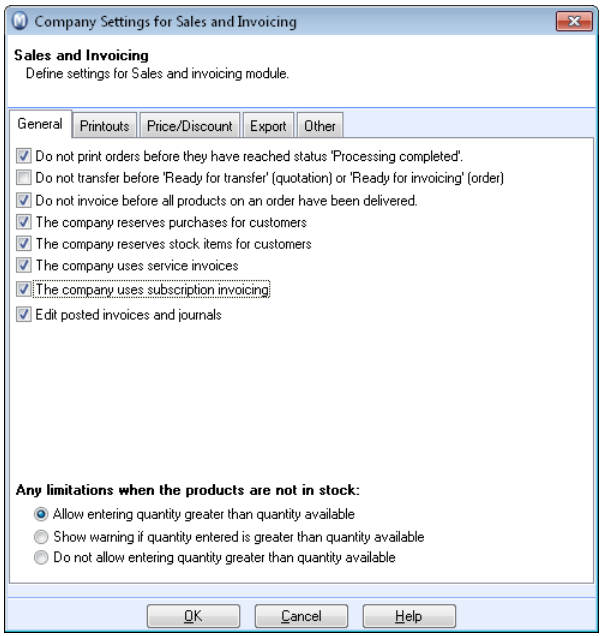
In help (F1), you can find more information about Subscription Invoicing. You can also download further information from our website: www.mamut.co.uk.

Getting Started with Mamut Enterprise Subscription Invoicing

This functionality is only available as an additional product for certain program versions. Contact your software supplier to find out whether the functionality is available for your version of the program.

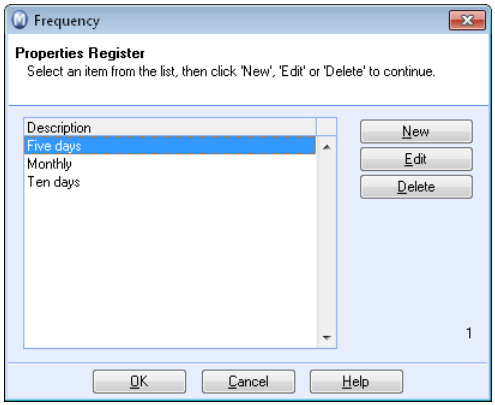
How to get started

1. Activate the functionality by going to **View - Settings - Company -Settings per Module - Sales and Invoicing**. Under the **General** tab, tick the box for **The company uses subscription invoicing**.



Now restart the program.

2. Set up your required frequencies in the **Properties Register**. The frequency determines when/how often sales orders may be generated based on customer subscriptions linked to a subscription. Go to **View - Settings - Company - Properties Register** and browse for **Frequency**.



3. Create your subscription.
4. Create your customer subscriptions.

You are now ready to generate sales orders based on customer subscriptions.

Program Versions without Accounting Functionality

Invoicing

Detailed Invoice List

Note! This chapter only applies to versions of the program which do not contain the Accounting module. For program versions, see the 'Customer and Supplier Ledger' chapter in the "Complete CRM, Sales Management and Web Solutions" introduction manual.

Through the **Detailed invoice list** you can keep track of all outstanding invoices. By registering payments, you have all the necessary information for customer follow-up after the final sale.

Click **Show in detailed invoice list** on the toolbar in the **Sales and Invoicing - Order Registration** window. It is possible to open the same window from **View - Sales and Invoicing - Detailed invoice list**.

For a better overview, you can set the filter so that you only see invoices that **Must be reminded** or that are **Overdue for payment**, or **Open items**.

When you have defined a selection, you must click **Update** in order to update the content of the window.

Select an invoice and click **Edit** to adjust the information about Payments and Reminders for the invoice.

Detailed Invoice list

Filter -> | Must be reminded | Current | Not paid

Invoice no.	Customer no.	Name	Overdue	No. of payment rem	Invoiced	Paid / Credited	Currency
1	30012	CJS Joiner Services	11/04/2007		3,732.69	3,732.69	GBP
2	30006	Excell Conferences	14/04/2007		3,773.59		GBP
3	30038	Unicorn Conference Center	18/04/2007		17,243.96		GBP
4	30002	The Design Centre	26/04/2007		4,570.77		GBP
5	30005	Ergo World Chairs	27/04/2007		1,466.40		GBP
6	30009	Lansdowne Furnitures	02/05/2007		3,066.81		GBP
7	30049	Hanson Hotel	27/04/2007		15,041.93		GBP
8	30002	The Design Centre	03/05/2007		4,275.24		GBP
9	30009	Lansdowne Furnitures	04/05/2007		3,375.55		GBP
10	30001	Bruce Fellster	04/05/2007		5,712.68		GBP
11	30007	FIN Conference Centre	04/05/2007		4,073.77		GBP
12	30045	Times Square	04/05/2007		4,162.59		GBP
13	30042	Professional Interiors Ltd	08/05/2007		9,810.64		GBP
14	30041	Your Home ltd	04/05/2007		29,418.38		GBP
16	30009	Lansdowne Furnitures	15/05/2007		75,672.62		GBP
17	30042	Professional Interiors Ltd	12/05/2007		5,750.62		GBP
18	30036	6th Wave Technologies Ltd	16/05/2007		26,899.70		GBP
19	30007	FIN Conference Centre	13/06/2007		10,948.00		GBP
20	30000	The Furniture Store	17/06/2007		23,259.71		GBP
21	30041	Your Home ltd	13/06/2007		77,037.05		GBP
22	30002	The Design Centre	15/04/2008		49,690.73		GBP
23	30009	Lansdowne Furnitures	15/04/2008		4,589.40		GBP
24	30042	Professional Interiors Ltd	15/04/2008		20,074.88		GBP
25	30006	Excell Conferences	15/04/2008		9,404.58		GBP
26	30004	Bens Furniture	25/04/2008		5,546.04		GBP
27	30038	Unicorn Conference Center	25/04/2008		8,078.13		GBP

The **Register Payment** button allows you to register the selected invoice as paid.

Payment Reminder and **Debt collection** are generated automatically by their own procedures from the window. You can also print out a list of the invoices that will be sent to **Factoring**.

The button **Payment reminder/Debt collection settings** opens a settings window in which you can define the number of payment reminders before debt collection; along with the amount of the reminder fees, amount limit per invoice, payment term for the payment reminder as well as how many days after the payments due date a payment reminder should be suggested. The settings for **Payment reminder fee** can also be found in the company settings for **Sales and Invoicing** in the tab **Other**.

Note! The amount of the payment reminder fee is regulated by law.

The **Print** button provides you with an overview of the content of the window. You are able to print the report from the preview window.

Note! The products that contain accounting functionality have a more powerful accounts ledger. This makes it easier for you to keep track of **Payment Reminders** and **Debt Collection**, in addition to giving you the possibility to utilise automatic **Interest calculation**.

Important! Be aware that items in some detailed invoice lists will not be displayed in the ledgers when upgrading to a larger program/higher version with a customer/supplier ledger, due to a missing chart of accounts reference.

Registration of Payments

Note! This only applies to versions of the program which do not contain the Accounting module.

After an invoice has been paid, you should register the payment. Paid invoices will not be put forward for automatic reminders, factoring or debt collection.

The amount the customer pays is not always the exact amount given on the invoice. Therefore, you are able to adjust the amount here. The Invoiced column will then be updated with the payment that is made, so that the next time you register a payment in connection with a specific invoice, the outstanding balance will be shown.

Select the invoice you have received the payment for and click **Register Payment** in the toolbar.

The window automatically shows the total amount of the invoice, and the current date as **Payment date**. Click **OK** if all the information in the window corresponds correctly with the actual payment you are registering.

Adjust the **Payment** field if the amount paid is different to the invoiced amount, and change the **Payment date** if you registered the payment on a different day than the day you received it.

If the payment is made in a different **Currency**, you can select the currency in the drop-down list to the right, and edit the amount in that currency.

Tip! To simplify the registration of several payments, you can easily obtain the next invoice in the list without closing the window. Press the plus sign [+] next to the numbers on the keyboard, and [Enter] to obtain the next invoice.

After invoices are registered as paid, the invoice list will be updated with the paid amount. If the entire invoice is paid, it will be renamed as **Paid** invoice. If you have activated the filter in the invoice list, you must choose to show the invoice as **Paid** in the drop-down list to the right to see the invoice.

Payment Reminders

Note! This only applies to versions of the program which do not include the Accounting module.

Throughout this process you will have complete control over which invoice payments the reminders will be issued for.

How to issue payment reminders for your invoices

1. Click on the **Reminder** button in the toolbar.
2. Select the actions that you wish to be carried out and click **Next**.

   Decide whether you would like to run all four actions at once. For example, if you make use of **Factoring**, it would be natural not to run the other actions.

   Note! You are the one who decides the settings regarding how many days after the due date the payment reminders should be sent. All invoices that fulfil the specified criteria will then be included in the payment reminder proposal. If you would like to defer sending a reminder to certain customers or for certain invoices, you can easily remove them from the list.
3. Set the filter to only show the invoices that are **Due after** a particular date.
4. Clear the check boxes of the customers to whom you do not want to send reminders to, for example if you have a special agreement with them. You can also control this for an individual invoice.
5. Select the line for the customer whose invoice you wish to view and click **View invoices**. This expands the window, providing you with a list of invoices due for that customer.
6. Click **Next** when you are satisfied with the selection. You can select between sending one reminder to each customer or one reminder per invoice. If you have several reminders for the same customer, you are able to group them together in one printout.

   The procedure will now continue with a selection of invoices for **Factoring** and **Debt collection**, if you chose this from the first window. The factoring list will be printed out after you have set all of the selections
7. Click **Next** to print the reminders. You will see a preview of the invoices on the screen.
8. Print the reminders, and check the printouts before you approve them.
9. Click **Complete** to approve the results.

   The invoice list will now be updated with the Number of reminders and the date of the last reminder.

Further follow-up

Note! This only applies to versions of the program which do not contain the **Accounting** module.

When sending a Reminder, a new invoice with the calculated reminder fee will automatically be printed out. The invoice list will be updated with the number of reminders sent and the date of the last reminder.

Settings

You can decide how many reminders will be sent before the invoice goes to Debt collection. After the last reminder is sent, the relevant invoice will be put forward for Notice of debt collection and later to Debt collection.

Specify the settings for your reminder schedule by clicking **Reminder/Debt collection** settings in the toolbar.

All of the information regarding reminders is entered here. If the invoice exceeds the **No. of reminders before notice of debt collection**, a reminder invoice will not be generated. Instead, the invoice will be entered into the process of generating a notice of debt collection.

With each reminder, any **Reminder fee** you enter here will automatically be added to the invoiced total. With the second reminder, the reminder fee will be added for a second time, etc.

You can also enter a **Limit for amount per invoice**. The costs of reminders for small amounts can quickly exceed the payment due!

You can also specify your own **Terms of payment** for reminder invoices, if you want a different due date for the reminder than the usual invoice.

Also set the **No. of days after due date before reminder shall be suggested**. It is normal for companies to pay the bill on the due date, and it may take a little time before the payment is registered with you.

Factoring

Note! This only applies to versions of the program which do not contain the **Accounting** module.

If you do not wish to handle the follow-up of your invoices yourself, you can hire a Factoring company to take care of this and send all your invoicing information directly to them.

Which of your invoices will be sent to Factoring is selected in the settings window in the Detailed Invoice List before you get started with the procedure.

If you run the complete process with payment reminders, factoring, notice of debt collection and debt collection, the invoices to factoring will be suggested after the payment reminder section.

Tip! Factoring can be set as default for your company database, for single customers and can be overruled for individual orders.

How to print a list of invoices to be sent to Factoring

1. Clear the check box for the invoices you do not wish to send all invoices to factoring.
   The procedure will now continue with proposals for **Notice for Debt Collection** and **Debt Collection** if you chose so in the first window. The factoring list will be printed after all selections have been made.
2. Click **Next** to print out the factoring list. You will first be shown a preview on your screen.
3. Print the list and check the printout before approving it.
4. Click **Complete** to approve the printout.

   The invoices are removed from the invoice list since any further follow-up is no longer your responsibility.

Notice of Debt Collection

Note! This only applies to versions of the program which do not contain the **Accounting** module.

In the **Settings for payment reminders and debt collection**, you enter the number of reminders to be sent before a notice of debt collection is issued. An invoice for which a payment reminder has been sent that amount of times will not be suggested for another payment reminder the next time, but instead a notice of debt collection will be issued.

Should this still not lead to the payment of the invoice, it will go straight to Debt Collection the next time.

How to print debt collection notices

1. Clear the check box for the invoices you do not wish to send a notice of debt collection for and click **Next**. The wizard will now continue with suggestions for Debt collection if you choose so in the first window. The printing of notices of debt collection will then take place after the selection for the debt collection list has been made.
2. Click **Next** to print out the **Notice of Debt Collection**. You will first be shown a preview on your screen.
3. Print all your notices of debt collection and check the printouts before approving them.
4. Click **Complete** to approve the printouts.

   The invoices are updated in the No. of payment reminders column and will be sent to Debt Collection in the next round.

Debt Collection

Note! This only applies to versions of the program which do not contain the **Accounting** module.

Invoices that are not being paid after you sent a notice of debt collection will now be suggested for Debt Collection.

These invoices will be printed out on a debt collection list with all necessary information about the customer and the claim, so that your chosen debt collection company can collect the debt.

How to print out the debt collection list for your debt collection company

1. Clear the check box for the invoices you do not wish to be sent to debt collection and click **Next**.
2. Click **Next** to print out the list of invoices for Debt Collection and any other printouts you may have selected in previous screens. All printouts will first be shown as a preview on your screen.
3. Print all reports and check the printouts before approving them.
4. Click **Complete** to approve the Debt Collection list.

   The invoices are removed from the invoice list since any further follow-up is no longer you responsibility.

Tip! Remember that all payment reminders, the factoring list, notices of debt collection and the debt collection are printed before you approve them. Should you detect an error or are missing a particular printout; you should abort the process and go back to address the errors, before resetting all selections and printing all documents again.

Sales Budget

Sales Budget (Systems without accounting functionality)

Note! The Sales budget functionality only applies to systems that do not contain any accounting functionality. If you have a licence for a system containing accounting functionality, all budget functions are available by going to **View - Accounting - Budget**.

The sales budget function provides easy and efficient sales budgeting for sales people and sales managers. In addition to generating budgets, the module also provides a simple overview of company revenues, both on a superior level as well as on customer, sales and project or product levels.

To open a sales budget, select **View** - **Sales and Invoicing** and **Sales budget**. This opens the settings window for Sales budget. You specify how the budget is linked to customers, products, sales persons and projects in the top part of the window. The accrued budgetary figures (monthly) are then entered in the matrix below.

- Before you can enter the figures in the budget fields, you must specify which combination of customer, products, salesperson and project the budget is to apply to.
- First select the desired combination of customer, products, sales person and/or project to which the budget applies. All categories must be filled in. Note that you have the option of selecting Miscellaneous in each of the drop-down lists. Click the browse button to choose from a list of options. The budget fields will remain inactive until you have defined your criteria.
- Select the year the budget will apply to, whether the budget is to be updated Automatically and whether Actual figures will be updated continuously. You can also select whether to show variances as percentages or in actual figures.
- Enter the budgetary figures for all combinations of customers, products, sales persons and projects you are creating the budget for. You are then given the option of checking the budgetary figures for the combinations in each period. The budget figures are registered specifically for each period, and are totalled in the top row for the whole year.
- If you need to change the budget later, you set the new filter in the combination of customer, product, salesperson and project you want to make amendments in.

Drilldown - Sales Budget (Systems without accounting functionality)

Note! The Sales budget functionality only applies to systems that do not contain any accounting functionality. If you have a licence for a system containing accounting functionality, all budget functions are available by going to **View - Accounting - Budget**.

To see which values the budget figures for a defined period are based on, you can click on the period you wish to examine in more detail. You will now be presented with the underlying budget figures that have been entered for the various combinations of customers, products, sales persons and projects for this period.

The table for the underlying budget values appears when you select the desired period and left-click the mouse.

The figures in the table specify the budgetary figures for the selected period and selection. This gives a full overview of the values that have been budgeted for each individual salesperson down to the product, contact and project levels.

Tip! Click outside the window to return to the budget.

Chapter 4: E-Commerce

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The functionality described in this section may be either partly or fully available within your program version. You will find a detailed overview of all of the functionality included in all Mamut products on our website at www.mamut.com/uk/functionality.

If you are unable to find the answer you are after within this chapter, you can refer to the More Information chapter where you will find tips on how you can get further help.
If you wish to order or receive more information regarding Mamut products, you can contact our sales department at sales@mamut.co.uk or by phone on 0207 153 0900.

About E-Commerce

In a world where "everyone" is searching for information on products and services on the Internet before they buy, it is easy to get left behind if your company lacks web presence. By utilising the possibilities afforded by your Mamut-system you can easily create your own website with webshop and be available to both existing and potential customers around the clock.

What is a website?

A website is a space on the Internet, where you store a collection of pages with information about your company, for example. A website usually consists of a main page from which links the visitor to several sub-pages with information on, for example, the company and services offered. A webshop, where customers can purchase the company's products, can also be part of a website.

Why should I have a website?

Even if you do not have your own website already, you may have thought about it before? There are many advantages with having a website where customers can find information about your company, around the clock.

Prerequisites

If you have a program from the Mamut Business Software series or Mamut Web Free installed, you already have everything you need in order to get started and create your own professional website with webshop facility in a few simple steps.

Previous knowledge

Creating a website through your Mamut program requires no previous knowledge or website publication experience. The editing process takes place in the **E-Commerce** module, which contains a user-friendly publishing tool, so that you don't have to worry about HTML-coding and upload via a FTP-server. If you are familiar with regular word processing and formatting in e.g. Microsoft Word, you will recognise many of the editing options in the **Edit website** module.

E-Commerce with Mamut Business Software

You can create your own website with a webshop from the **E-Commerce** focus area or by going to **View - E-Commerce**.

Website with design templates

You can create your own website with the help of an extremely user-friendly module that does not require any previous website building knowledge, where you can choose between a wide selection of flexible design templates, developed by professional web designers. How often the site is updated is also completely up to you. For example, you can set up and, when necessary, update your site with separate pages for news, information, marketing, user support, contacting you and a webshop. Why not place more focus on your marketing initiatives by creating a special campaign page that will be seen by all your visitors? You will receive your own web address and also have space allocated to you on our net server. If you have your own domain name, you can use this as well. The transfer of your website from your PC to the server happens automatically at the push of a button.

Webshop wi6th shopping cart

The advanced webshop including shopping cart functionality makes shopping easy and safe for your customers. Integration with your product list ensures your shop is easy to set up and maintain. All orders are transferred to the Order module automatically and order confirmations are sent to your customer's e-mail address automatically. When ordering, the order and customer card are being created in the system automatically as well.

You decide yourself which delivery and payment terms you would like to offer in your webshop. There is also support for credit card payments, including handling of security code and SSL (Secure Sockets Layer), which ensures the security of web transactions.

Web enquiries

When a potential customer contacts you via your website, a customer card will automatically be created and will contain all of the necessary information for further follow-up. If the customer is already registered, the query will be automatically assigned as an activity on the customer card. Based on the type of query, it will be categorised automatically in the Contact register. When buying items from the webshop, the order will be created in the Order module automatically.

Visitor statistics

The E-Commerce module gives you full access to the visitor statistics for your website, which can help you with developing your website's look and functionality further. The traffic summary gives you a quick overview of the number of visitors in a certain period or for the total happiness of your site, as well as visitor record numbers. More detailed statistics can be exported to Microsoft Excel and contain information about the number of visitors for each day. You will also receive separate statistics for your website and your webshop. The update-history functionality ensures that you keep track of how often your website is being changed. The statistics can be found on the Mamut Information Desk.

Editing the website

The **Edit website** function is the area of the **E-Commerce** module, where you should spend most of your time. It contains five tabs where you register the content for your website and webshop.

Preview

A preview function is available and lets you see how your website or webshop will look on the Internet. However, you cannot preview the shopping cart from here. This is only possible once you have published your website.

Updates

You always need to make sure that you update our server with your latest website content after making changes. For this, you use the **Update** function. Simultaneously, the program will also automatically check for updates to templates or other items that you should install so that you always have the latest functionality available to you.

Get website data

To download the latest customer orders from your webshop into the Order module, use the **Get website data** function. If your website contains a contact page as well, the download will include this information as well, and it will be saved as activities. Websites allowing the registration of password-protected pages will also download information on new members.

Website Settings

In this part of the module you adjust your settings for the website and webshop, e.g. the display of VAT, price rounding, password protection and credit card payments.

How to get there

Go to **View - E-Commerce** and pick out the function you want to use or select **E-Commerce** as the focus area in the menu to the left of the desktop. This will give you access to the shortcut to the various connected modules.

Note! In the program the term 'website' usually refers to your entire website. Websites can also contain a webshop section, which is where you offer your products to your customers to purchase via the Internet.

Additional products and Enterprise Extensions

If you require more advanced functionality than what is included in your Mamut program by default, then you can purchase additional products and extensions for your program.

You can find more information about Mamut's additional products and services at www.mamut.co.uk/addons.

Tips - What to consider before you start

Before you start setting up your own website it is a good idea to sit down and think about what it is you want to get out of your web presence. Think about which message you want to communicate to website visitors and also consider how you can achieve a clean look that makes it easy for visitors to navigate and find information. Many Internet users can be rather impatient and will not go back to a website they found hard to navigate and where they were unable to locate the information they were after within a few clicks.

First impressions

It is important to make a good first impression if you want visitors to spend time - and possibly money - on your website. Make sure that the text content you publish is free from spelling mistakes as these can give off a bad impression and visitors may perceive this as a sign of unreliability.

Your website should have a welcoming and user-friendly design, making it easy for one to find their way around the site. Therefore, it is a good idea to spend some time looking at other websites to see how they are structured and made accessible for visitors.

Structured content

Before you start entering and editing the content for your website you should give some thought to which information you want to provide and communicate to visitors. Why not draw up a plan in advance where you specify which pages you will need in order to present all information in an easily accessible manner. It is also a good idea to allocate the different content/information to the relevant pages.

Company information

To create a level of reliability and to give website visitors information as to who is behind the website, you should introduce your company and possibly say a few words about your company vision, employees, history and so on. If you would like to sell products on your website you should also inform visitors about the terms and conditions of your webshop.

Contact information

In order to be perceived as a credible business, it is important that you provide information regarding various ways of getting in touch with your company. It is a good idea to provide your trading and/or visiting address, telephone number, fax number and e-mail address. Most people also appreciate information about employees and opening hours. You may want to create a separate contact page that website visitors can use for getting in touch with you easily.

Customise the website for your company

If you plan on selling products via a webshop you need to give some thought to which product groups and sub-groups could be useful in simplifying the search for the correct product. If you are using the Product register in Mamut from earlier, you may have already created the product groups you require. If not, you can customise the product groups and sub-groups within the Properties Register.

Customer satisfaction and routines

Once you have created and published your website on the Internet you should make it a habit to download data from your website on a regular basis, preferably daily. Follow up any enquiries you receive and provide feedback within a reasonable time frame. It is also important to process orders quickly and send ordered products to your customers as soon as possible.

Quality checks for content and links

Following publication of your website, it is important that get into the habit of quality checking all content you have put out on the web. At regular intervals, check that links are working, pictures are being displayed properly and that text and other content is up-to-date with the latest information. A website that is not managed properly and updated regularly is easily perceived as unreliable and possesses little credibility.

Design tips for Websites

Before creating your own website, ensure you spend some time considering the colours and design you want to use. The selections you make for your website should be in line with your company and its identity.

Font, size and colour

When you come to deciding the font to be used on your website, your main concern should be for its readability. Verdana and Arial are fonts that are used on the web a lot and are considered easy to read on a computer screen. The font size should not be too big or too small. In most cases, font sizes 8-10 will be adequate. Also make sure to apply the same font to all your pages to achieve a uniform look for your website.

Underlining text on websites should be avoided because most people will assume that underlined text represents a link.

Another thing to consider is the use of colour on your website. Text should be in a colour that is easy to read on the background colour you select. Try and avoid using too many different colours in your text as this can look confusing and unprofessional.

Use of logos, pictures and graphics

If you have your own company logo, you can upload it and use it on your website. A logo is a good way of marketing your company and will help you to create a recognisable brand and credibility with your customers. Another idea is to use relevant pictures and graphics to bring your website pages alive and make them more attractive to potential visitors. Websites with too much text can appear boring, though you should of course be careful not to go overboard with illustrations. It is also possible to use background pictures on your website, but again you should be careful with how you use them. A background picture can easily end up taking too much focus away from the text and be too distractive.

Use of tables for more editing flexibility

To structure the content of a website it could be a big advantage to use a combination of tables, pictures and text. Tables enable you to specify the placement of the different elements more precisely. Without tables it is more difficult to control the placement of elements in relation to another. For example, if you like to place text next to a picture this is tricky without the use of tables. Tables also make it possible to apply minimum heights or widths for content.

You can find more tips on website editing and the use of tables in our article database at www.mamut.co.uk/support/search.

Getting Started with your own Website

It should not take you more than half an hour to have a basic website up and running on the web. A little more time invested and you will be able to present an appealing and professional-looking website including a webshop, if you like.

Below is a simple step-by-step guide of the minimum requirements for registering and creating your own website.

> **Note!** In the program the term 'website' usually refers to your entire website. Websites can also contain a webshop, which where you offer your products to your customers to buy via the Internet.

How to register your website and get it onto the web

1. Select **View** - **E-Commerce** - **Edit Website**.
2. Click **New** to create your own website and select a name for it.
3. **Register website** and follow the wizard helping you to create an address for the website and to register it on the Mamut server.

   You can now open your web browser, e.g. Internet Explorer, and go to the address you registered.

Editing content on your website

Once you have registered your website you can start to customise and edit the content you would like to fill your website with. The editing takes place in the **Edit Website** module, which you will find by going to **View - E-Commerce - Edit Website**. The module is built in the form of a wizard taking you from one window to another by clicking **Next**. This guides you through all the tabs where you are able to register information. You can also go to the **About the Company**, **Content**, **Webshop** and **Design template** tabs and their respective sub-tabs directly.

You can find out more about how to edit the content on your website in a separate chapter.

Once you have added all information for your website, you need to update/publish the content in order for it to show on your website on the Internet. You do so by going to **View - E-Commerce - Update Website**.

You can find out more about how to update/publish your website in a separate chapter.

Tip! If you cannot see your changes after you have updated your website, hold down the **[Ctrl]** and press **[F5]** a few times to update the content on the screen.

Find out how to get started with your own webshop in a separate section.

Website Content

A well-presented website can easily become one of the most important channels for you to relay information to your customers. Not simply because you provide information about your products but also because you are conveying information about your business, campaigns and other things of interest to both customers and partners.

Content

A website consists of several web pages, one of which is the main page that visitors will see first when they go to your website. Additionally, you can build up your website with any number of sub-pages and news-pages as and when you need. You can also create a 'Contact Us' page to make it easier for visitors to get in touch with you.

The actual content you would like to present on your website has to be entered under the **Content** tab and its sub-tabs.

If you would like to be able to sell your products on your website you need to use the webshop functionality. You can decide whether you want to have a website only or a website with webshop. Find out more about webshops in a separate chapter.

Note! The term 'website' when used in the program denominates your entire website. A website can also contain a 'webshop', which is the area of the website where your customers can purchase your products.

Editing content

There are a number of tools built into the program to help you edit and format the content of your website. E.g. you can insert pictures, link to other web pages, tables or entire HRML files you have created in a different program. You can find a complete overview of all available editing tools in a separate section.

> **Note!** You can go back to edit and adjust content as many times as you like and whenever you need. Just remember to re-publish your website so the changes will be shown on the web.

Settings and adjustments

Under **Website Settings** you can make your preferred settings to apply to your website and webshop. You can also customise labels (headers) that will show on your website and register search engine keywords. Find out more about Website Settings, Labels and Search Engine Keywords in their respective sections.

Updating/Publishing a website

Once you have added all of the content you want for your website you need to select **Update website** so that your website will be published on the web. The same applies after you have made changes to the content. You can find out more about updating your website in a separate section.

Get website data

The **Get website data** function checks whether any new activities were registered on your website and if so, will download orders that have been made in your webshop and queries you have received via your contact pages. You can find out more about website data in a separate section.

> **Note!** The E-Commerce Module can only be used by one user at a time, even if you own a multi-user licence version of the program.

Updating your Website

After editing your website, or changing user permissions (in the case of password protection), you must **Update** or publish the website to the server. None of the changes will be available on the Internet until you have gone through this procedure.

A standard update will only upload your changes on the website. Since you have limited storage space, you should periodically perform a **Full update** (see point 3). This will delete all information on the server and upload only the information you wish to display on the website.

How to update your website

1. Start updating from **View - E-Commerce** and **Update Website**. The system will automatically check if design template updates are available. If updates are available on the server, you will be notified. You can then download these as described below, and then begin the update of your website again.
2. Select the website you wish to update.
   If you have made major changes, you should also select **Full update** to clear the content on the server.
3. Click **Update**.
   The program will now generate the updated website, pack the information and upload it to your area on the server.
4. Click **Go to website** or click the link to the website in the e-mail you receive when updating is complete.
5. Check that the content is presented the way you want it to.
   If you are not satisfied, open **Edit Website** or **Website Settings** and correct any errors before you update again.

   Your website has now been updated.

Tip! If you are unable to see any changes after updating your website you can hold down the **[CTRL]** key and press **[F5]** a few times to update the content on the screen.

Updated design templates

At regular intervals we offer updated design templates. The program automatically searches for design updates, each time you choose to edit, preview or update your website via **View** - **E-commerce** - **Edit/Preview/Update Website**, and you will be notified when new updates are available.

How to retrieve updated design templates

1. Click **OK** in the dialog box notifying you that updates are available. You will now be taken to the update wizard, where you will be able to see more detailed information about the update.
2. Click **Next** to start the download.

   Note! You will not be able to edit, preview or update your website until you have retrieved the updates. You are able to interrupt the wizard by clicking **Cancel**, but this will also interrupt the process you originally started.
3. Once the update has completed, you will get a dialog box confirming this. Click **OK**.

   The new design templates will now be available from the Design templates tab under Edit Website.

About Webshop

If you would like to put your products out for sale on the Internet, it is easy to set up your own webshop with the help of the E-Commerce solution in Mamut. The products you wish to sell need to be registered in the Product Register in Mamut first and you can then make them available for sale in the webshop.

Choose which of your products will be available for sale on the webshop

You yourself are able to control which of your products will be available for sale in the webshop. Below you are able to read more about how you can make products available for sale in the webshop.

Tip! Remember that the payment terms are defined in the company settings in Mamut Business Software along with any discounts you wish to use in the webshop. Read more about discounts in the chapter "Sales Follow-up".

Include product photos and descriptions for use on the webshop

You can include product pictures and product descriptions for each individual product. The photo and description will be shown in the webshop after updating the webshop.

Show Stock, exact or as intervals

The webshop can show the stock status for all of the products held in stock that are offered on the webshop. The warehouse status is the number in stock minus the number that is already on the order or reserved for customers in another way. The warehouse status supports all design templates that show the products on the front page. Stock status is also shown per variant (additional product in some program versions) when a product is sold in different variations.

Payment Services

If you wish to offer payment with credit card on your webshop, you must have a Mamut system with support for shopping cart, and you must enter into an agreement with a payment party. For more information about payment service solutions in Mamut Business Software you can contact our sales department at info@mamut.co.uk or by phone on 020 7153 0900.

Product Variations in the Webshop

You can sell products in different variations in the webshop. Read more about this in the chapter "Product".

Note! Product variations demand a licence on additional products in some program versions.

Mamut Enterprise PartnerWeb

To make your webshop more professional, you can purchase the additional product Mamut Enterprise PartnerWeb. With this additional product your customers can create user accounts within the webshop so that they are able to log into the shop themselves. This allows you to provide discounts to chosen customers that are able to see the adjusted prices when they log in. In addition, they will receive e-mails after changes to their orders and their customer information is saved in their user profile so that customers do not have to enter this information more than once.

You can find more information about additional products and Enterprise extension on www.mamut.co.uk/addons

Getting started with your own Webshop

For you to be able to sell a product in your webshop, the product needs to be registered in the program's Product Register first. You must also select the option **Should be available for sale on one or more websites** on the **Webshop** tab. New products are added to the register by going to **View - Product - Product Register** or by clicking on the **New** under **View - E-Commerce - Edit Website - Content - Product Selection**.

> **Note!** If the **Webshop** tab is not displayed in the product register, you must select the option **Company sells products on the Internet** in the company settings for products.

Additionally, you have to set up a minimum of one delivery method and one form of payment so that it is possible to complete a sale in the webshop. You may use as many delivery methods and forms of payments as you need.

How to get started with your own webshop

1. Go to **View - E-Commerce - Edit Website**, select the **Content** tab and then the **Product Selection** sub-tab. Add the products you want to sell in your webshop by clicking **Items in your Webshop** and using the arrow buttons in the window that opens.
2. Move to the **Webshop** tab and select its **Company Information** sub-tab. Tick the boxes to select which information about your company will show in your webshop.
3. Move to the **Store Policy** sub-tab and formulate your terms and conditions for purchasing items in your webshop.
4. Move to the **Customer Info** sub-tab and tick the relevant boxes to determine which information you need your customers to provide when shopping in your webshop.
5. Go to **View** - **Settings** - **Company** - **Properties Register**, and find **Delivery method**. Tick **Available on the web** for the delivery methods you wish to be used in the webshop.
6. Go to **View** - **Settings** - **Company** - **Properties Register**, and find **Payment terms**. Tick **Available on the web** for the Payment terms you wish to be used in the webshop.

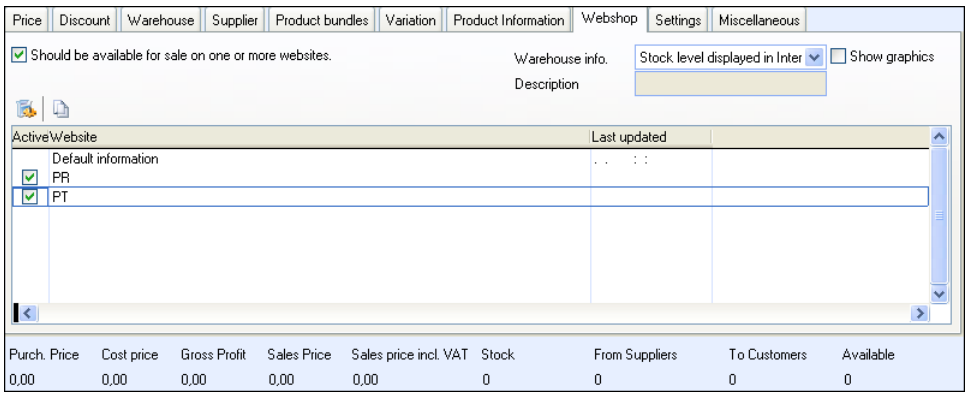
7. Finally, go to the **Design template** tab and choose which template and colour style you would like to use for your webshop.
8. Go to **View - E-Commerce - Update Website** to publish the content on the Internet.

Your webshop is now open and visitors can order your products there.

How to Make a Product Available in the Webshop

How to add a product to the Webshop

1. Select **View - Product - Product Register -** then choose the **Webshop** tab.



2. Select **Should be available for sale on one or more websites**.
3. In the **Active** column, check the website in which the product will be available.
4. Click **Website settings for product** in order to add an image and/or a description of the product.
   . Click **OK** when you have entered the information.
5. Click **Save**.

The product will be available for sale in the webshop the next time you update the website.

How to add a selection of products to the Webshop

1. Select **View - Product - Updating a Selection of Products**.
2. Click **Next** in the wizard.
3. Define a selection of products groups, for example, or let the fields remain blank if you want to make all your products available in the webshop.
4. Click **Next**.
5. Select the **Webshop** tab.
6. Check the box **Should be available for sale on one or more websites** and choose if the products will be available on all websites or select one from the drop down list.
7. Click **Next**.
8. Click **Finish** in order to make the products available for sale in the webshop.
9. Click **Close** to close the wizard.

The products will be available for sale in the webshop the next time you update the website.

Tip! You can also make products available for sale in the webshop through the **Items in your webshop** feature in the **Product Selection** sub-tab in the **Edit Website** module. To do so, you must first select the box **Should be available for sale on one or more websites** in the **Webshop** tab in the product register.

Product Picture and Product Description: In the **Website Settings for Product**, you can insert a product image and product descriptions for every individual product. The image and description will be displayed in the webshop when you have updated your website. You can access the **Website Settings for Product** from the **Webshop** tab and from the **Product Selection** tab in the **Edit Website** module.

Linking to other Websites

If you have a supplement licence to create several websites in the same database you can add one or more links between the websites. The link is created either in the Main page or the campaign page, if you have created one.

Before creating a link, you must create the page to which the link leads.

How to create a link to another website

1. Open the website in which you want to add the link.
2. Select **Link to other websites** in the **Menu** tab.
3. Click **New** to create a link.
4. Select the **Website** to which you wish to add a link.
5. Select where you are going to create a **Link from**: Main page or Campaign. If you want links from both pages, you must create two different links.
6. Enter a **Name of the link**. This is the name which will appear on the link. The text may be descriptive, e.g. 'Click here if you are a dealer!'
7. Click **OK**. The list has now been updated with the new link.
8. **Update** the changes to Mamut's server.

The list is now updated with the new links.

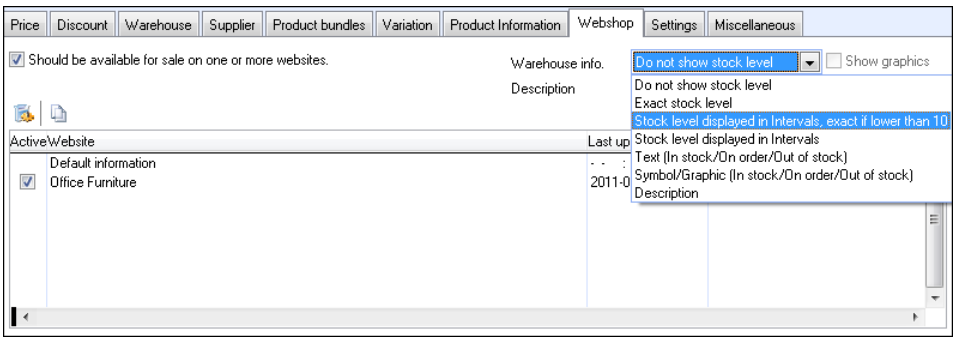
Make sure to update your website as well.

Note! In certain design templates the link is displayed in a drop-down list on the main page and does not appear immediately.

Showing Current Stock Levels in the Webshop

The Webshop can show the stock level for all stocked items, which are offered online. The Stock level is the number of products in stock minus the number of products already allocated to customers by order or reservation or any other way. The stock level is supported by all website templates that show products on their front page and the stock level will also be shown per variation (add-on product for some program versions), where a product is sold in variations.

> **Note!** The stock level, which will be shown in the webshop, is defined as the stock available to sell. Thus products, which have already been linked to a client, will not be included.



You can select whether or not a product is displayed with a stock level in the webshop from the **Warehouse info** drop-down menu in the **Webshop** tab in the **Product register**. Should you wish not to show the stock level, you leave the drop-down menu set to **Do not show stock level**. If you do want to show stock levels, you can select between various ways of doing so:

The stock levels can be displayed in different ways:

Exact stock level will show the exact number of the product in the warehouse, which is available for sale. Example: **Availability: 29 items in warehouse**.

Stock level displayed in Intervals, exact if lower than 10: Shows the stock level in intervals, but once stock levels drop below 10 items, the exact number in stock will be displayed. Example for 26 items remaining in stock: **Availability: 20 - 49 items in warehouse**.

Stock level displayed in intervals will show stock levels in intervals.
Example for 26 items remaining in stock: **Availability: 20 - 49 items in warehouse**.

You can edit the text used to display the stock level. The default lead text is Availability. Thus, the text - as it appears to the customer - is, for instance, **Availability: 20 - 49 items in warehouse**. Read more about labels in a separate section.

Text will show a set text for each status:

- In stock
- From suppliers
- Out of stock

Note! These are predefined texts. The user defined field below is used with the user defined text. You can edit these texts by editing the labels.

Symbol/graphics: Show symbols for In stock, From suppliers and Out of stock only. You can select which symbols to display in Website settings via the **Website settings** tab.

Description: Lets you choose your own text and show it in the webshop instead of displaying the number of items in stock. The text you wish to display is entered in the Description field. You also need to select Description from the drop-down list in order to display the text.
Example: "Sale: Only a few left!"

Product's product category: Instead of warehouse status, the product category selected in the product category field on the product card will show. You can create product categories from the **properties register**.

Tip! You can define the selection criteria in the **Default values** tab in **Module settings for product**, so that you will not have to enter them every time you create a new product.

To administer several products you can edit the display mode for stock for a selection of products by using the Updating a Selection of Products functionality.

Note! Stock level shows the level at the last webshop upload. Thus the levels will only be completely accurate from right after an upload up until the first order, either in the webshop or directly in the program. It is thus recommend that the import of web orders is routinely followed up with a webshop upload to allow for maximum accuracy in the stock level display. It might also be a good idea to publish a disclaimer in your webshop stating that stock levels are not binding.

Payment Services

Payment Services for the Webshop

If you would like to offer payment by credit/debit card in your webshop you need to have a Mamut system containing Shopping cart functionality. Additionally, you will also need to enter into an agreement with a payment service provider.

Payment service provider's act as web based payment terminals, which take care of the entire payment process when a customer in your webshop wants to pay by credit card. The payment service provider ensures the security of the transaction against fraud or other types of problems.

To receive credit/debit card payments from your webshop you will also need to set up one or more credit/debit card types in Forms of payment.

Supported Payment Services Provider(s) - PSPs:

Mamut Enterprise DIBS: By using Mamut Enterprise DIBS, you can now offer your customers a fast, easy and secure online payment service. DIBS Payment Services is the leading provider of Internet payment services in Scandinavia. Mamut Enterprise DIBS supports Barclays as a payments clearing supplier.

When making an online payment with Mamut Enterprise DIBS, the DIBS payment solution transfers the customer to the DIBS payment site. Sensitive credit card information is only handled by DIBS, which means that all transactions are kept secure and confidential.

Note! Mamut Enterprise DIBS is available as an extension to Mamut Enterprise.

Note! You need to publish your website again after you have made your payment services settings and set up your forms of payment to make the payment solution available on your website.

About Mamut Enterprise DIBS

By using Mamut Enterprise DIBS, you can now offer those customers paying by credit card a fast, easy and secure online payment service.

When making an online payment with Mamut Enterprise DIBS, the DIBS payment solution transfers the customer to the DIBS payment site. Sensitive credit card information is only handled by DIBS, meaning all transactions are kept secure and confidential.

Note! If you would like to offer payment by credit/debit card in your webshop, you require a valid licence for Mamut Business Software as well as an agreement with your bank/acquirer.

The online payment solution settings can be found by clicking **View - E-Commerce - Website Settings**. On the **Payment Services** tab, select **DIBS**. The option will be enabled for customers who have acquired a licence. If you do not have this option, you need to contact your Mamut contact person, as your licence must be upgraded.

Note! Mamut Enterprise DIBS is available as an extension to Mamut Enterprise.

Mamut Enterprise DIBS - Secure and Reliable Online Payment

- Standardised and user-friendly online payment terminal when paying with a credit card.
- Fully integrated with your Mamut Webshop.
- Supports VISA, MasterCard and Maestro.
- Sensitive credit card information is handled only by DIBS - a secure third party.
- "Verified by VISA (3d secure)" and "MasterCard SecureCode (3d secure)" secures sensitive information.
- DIBS provide an admin site where you obtain a full overview of all orders and payments.
- No minimum transaction amount for payments.
- Supports Barclays as a payments clearing supplier.

How to use the Mamut Enterprise DIBS Payment Service

If you would like to offer payment by credit card in your webshop, you need a valid licence for your Mamut software, an agreement with a payment provider as well as an agreement with your bank/acquirer. If you want to use the Mamut Enterprise DIBS credit card payment service, please contact Mamut's sales department for information about licencing and handling.

To activate the payment service, go to **View - E-Commerce** and click **Website Settings**. In the **Payment Services** tab, select **DIBS** from the drop-down list. If DIBS is not available in the list, please get in touch with your Mamut contact person - your licence may need upgrading. Payment service provider's act as web based payment terminals, which take care of the entire payment process when a customer in your webshop wishes to pay by credit card. The payment service providers ensure the security of the transaction against fraud or other types of problems.

Note! Mamut Enterprise DIBS is available as an extension of Mamut Enterprise and supports Barclays as a payments clearing supplier.

Once you have entered into an agreement with the payment service provider, and defined the correct payment service settings (see above), you must register the **ID** you have received from the provider.

In order to handle credit card payments in your webshop, you must create one or several **Forms of Payment** specific for payment using credit cards.

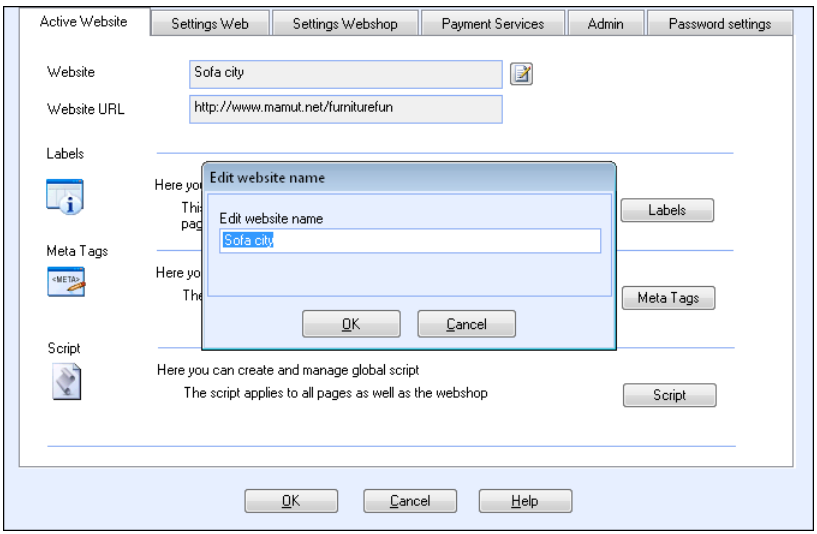
Note! The settings you have defined for the online payment service will only be available in your webshop once you have clicked **Update Website**.

Below is a detailed description of the various settings you must define within your Mamut program.

Step 1

Checking the name and address (URL) of your website

1. Go to **View - E-Commerce - Website Settings**.
2. Your website's name and address appears on the **Active Website** tab. Change the name by clicking the **Edit** button.

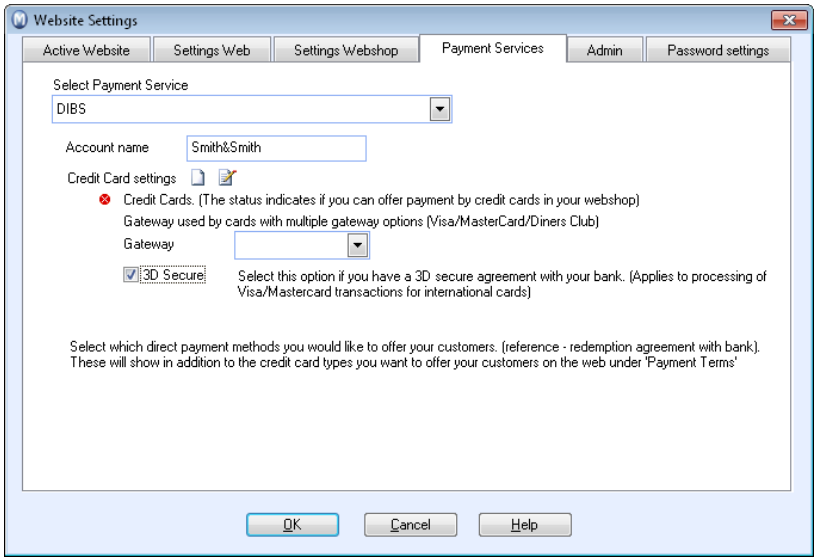


Your website name has now been changed.

Step 2

Define the Payment Service settings

1. In the **Payment Services** tab, select **DIBS** from the drop-down list. If you do not have this option, please contact Mamut's sales department, your licence needs to be upgraded.
2. Enter the **Account name** in order to activate the connection to DIBS. The name, which you will receive from DIBS, must be identical to the one you have received.



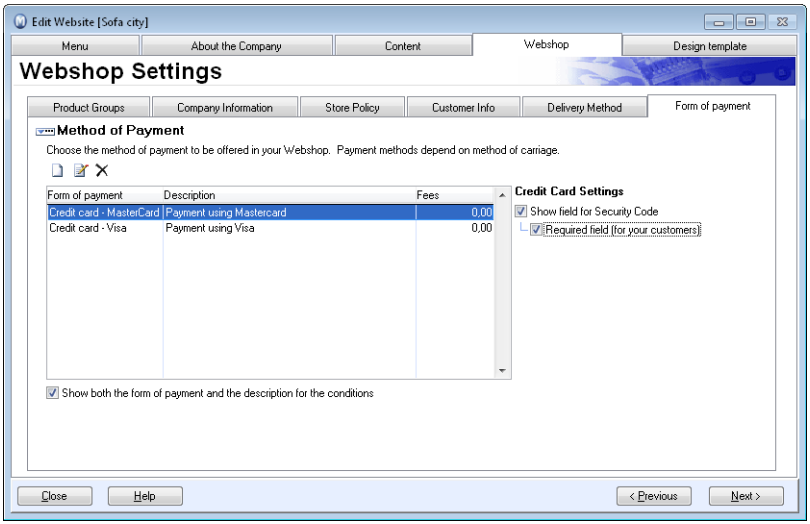
3. Select which direct payment alternatives you want to offer your customers from the **Gateway** drop-down list and/or which are included in the agreement with your bank/acquirer.
4. Check the **3D Secure** box (included in the agreement with DIBS).
5. Click **OK** to complete the process.

The payment service settings have now been defined in Mamut.

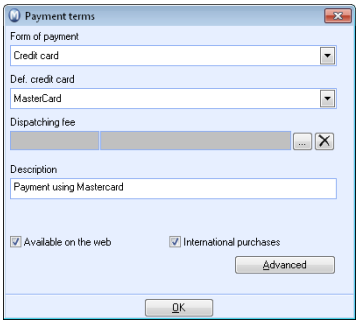
Step 3

How to customise your webshop

1. Go to **View - E-Commerce - Edit Website**. Select the sub-tab **Form of payment** in the **Webshop** tab.



2. Select the **Show field for Security Code** box (for manual credit card handling).



3. Enter payment terms by clicking the **New** button (or **Edit** to edit an existing payment term), select a credit card and enter the description which will be used in the webshop.

The webshop settings have now been defined. Remember to differentiate between shipping costs, etc. if you are selling your products to other countries. The best way to do that is to create two payment terms per credit card type.

Note! Once you have defined these settings, you must update your webshop by selecting **View - E-Commerce - Update Website**. **Payment Management**: To track customer payments, log on to your DIBS administration tool. Read more about this in the information from DIBS.

Website Editing

Once you have registered your website you can start to customise and edit the content you would like to fill your website with. The editing takes place in the **Edit Website** module, which you will find by going to **View - E-Commerce - Edit Website**. If you have created more than one website in the company database, you need to choose which of the websites you wish to open both when editing the website, and when changing the website settings.

The **Edit website** window is built in the form of a wizard taking you from one window to another by clicking **Next**. This guides you through all the tabs where you are able to register information. You can also go to the **About the Company**, **Content**, **Webshop** and **Design template** tabs and their respective sub-tabs directly. Read more about this below.

Selecting a Website

If you have created more than one website in the company database, you need to choose which of the websites you wish to open both when editing the website, and when changing the website settings.

You can also create new websites and change names of, or delete, existing websites in this window. The list provides information about:

Web site: The working title for a website.

Registration: The Internet address at which a website is registered.

Last updated: The date and time a website was last updated on the Mamut server.

How to select a website

1. Select **View** - **E-Commerce** - **Edit website** and **Website settings**.
2. Select the website you want to change.
3. Click **OK**.

   You will now be able to access Settings or the Edit Website feature for the website you selected.

How to create a new website

1. Click **New**.
   If you do not have an available licence to create more than one website, this option is not available. Licences are administered using **Administration of websites**.
2. Enter the name of the new website. This will be the working title of the website.
3. Complete the wizard **Website registration.**

   You can now begin to edit your Website.

How to create a copy of a website

1. Select the website you wish to copy.
2. Click **Duplicate**.

   If you do not have an available licence to create more than one website, this option is not available. Licences are administered using **Administration of websites**.
3. Enter the name of the new website.
   This will be the working title of the website.
4. Complete the wizard **Website registration**.
   If you want the new website to take over the name of the old one, you must first de-register the old website using **Administration of websites**.

   You can now begin to edit information from the old website using Edit Website.

How to delete a website

1. Select the website you want to delete.
2. Click **Delete**. If the website is registered, you will be connected the Internet and the website will be de-registered. This will delete all information stored on the website from the Mamut server.

   The website licence will still be reserved for this website. Thus the licence should be released in Administration of website licenses.

Changing the website name

1. Select the website you wish to change the name of.
2. Click **Edit**.
3. Change the website name. This will be the new working title of the website.
4. Click **OK**.

   The list will be updated with the new name.

You can also change the name of the website under **Website settings - Active website**.

Menu

The **Menu** tab contains links to some of the most central functions within this module.

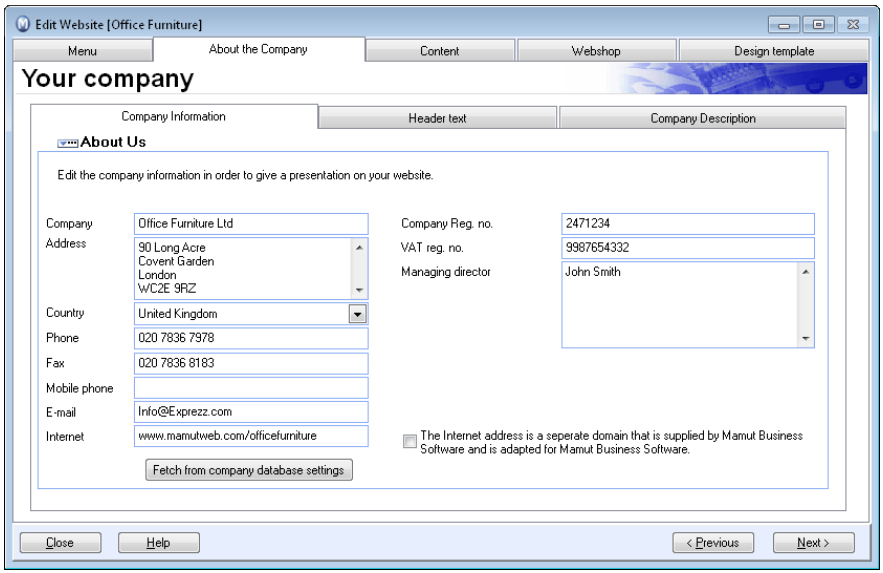
When editing the website you can go through the entire module, step by step, by using the **Next** button or by using the links in the **Menu** tab. You can also go directly to the following tabs: Company information, Main page, Webstore and Design templates.

The links under **Admin** go to functions that are not part of the module for Edit Website, and are described within the documentation for the respective modules. Remember that you can also click **[F1]** within the window in order to get a detailed description.

Company

Company Information

In the **Company information** tab you can enter name, address and other contact information you want available for customers who visit your website. By clicking the **Fetch from company database settings** button, the information entered into the company settings will be retrieved.



The link/button to the company information page is called **About Us** and will be displayed on the website, in the webshop and in the check out. If you want to change the text "About Us", you can click the **Edit text** button to the left of **About Us** in the **Company Information** tab.

Header Text

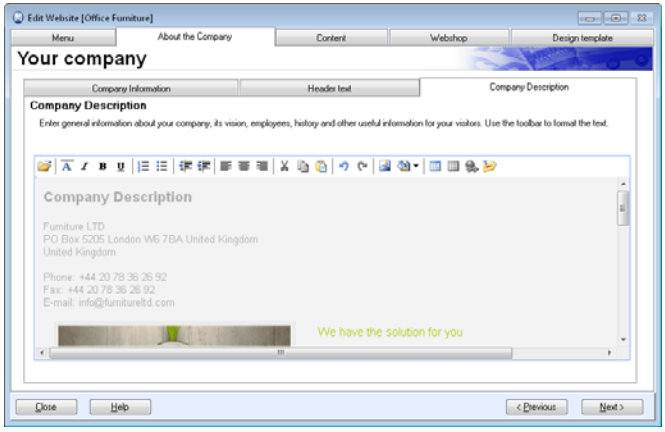
In the **Header text** tab, you can choose between a **Simplified header with company logo** and an **Advanced header with personalised content**. If you select a **Simplified header with company logo**, you can insert a company logo by clicking Select Logo. You will then be able to browse to the folder containing your logo files. Recommended logo size is 120 x 70 pixels in the GIF or JPG formats. You can use a wider logo in several design templates. If you select an **Advanced header with personalised content**, you will be able to customise your own header which can be displayed on all pages on the website, in the webshop and in the check out. The header can contain both text, logo and other image files. The contents can be edited in the same way you would edit all other pages on the website.

Note! The **Header text** feature is not available in all program versions and/or design templates. This applies to design templates where the header field has been located to the side of the content field and not above or below it. In these cases, a small company logo will be best suited.

Tip! The use of a company logo (in the form of a GIF image with a transparent background colour), placed on a background image related to your company/industry, is currently very common in web design. Simple methods such as this make it possible for you to create a professional-looking and unique website. You can also insert links referring to other pages on your website or external links. Use of tables can help you structure the page.

Company Description

In the **Company description** tab, you can enter general information about your company, its vision, employees, history and anything that you would like your customers/users to know about your company. You can also format text, insert images, tables, and links, etc. By clicking the **Insert company information** button, the contact information registered in the **Company Information** tab will be fetched.



Content

Main Page

The **Main page** tab of the websites content area is where you enter the information and/or insert pictures to be shown on the websites main page. Once you have written the information you can format the text by using the tool buttons.

> **Tip!** Remember that the first page on your website will be the first impression a customer will get of your company. It could be a good idea to talk about the purpose of the website and what the customer expects to find there in terms of information, contacts, products etc.

Click **Next** to continue to the next tab.

Campaign

From the **Campaign** tab you can present special offers for visitors to your website. This campaign page is the first page your customers encounter when they visit your site. The page disappears automatically following the **Time delay in seconds** you select, and visitors will be taken to the website's main page.

Click **Next** to proceed to the next tab.

Product Selection

In the **Product Selection** tab you decide which products you want to have available for sale in your webshop. Additionally, you can sort the product list in your webshop by product nr., product name and price; simply click the header of the regarding column so that it is shown in bold.

By clicking the **New** button you can add new products to the product register.

Highlight a product in the list and click on **Edit** to make changes to the product.

By clicking **Items in your webshop** you will be able to administer which products will be available in your webshop. For more information go to the separate topic for this function.

> **Note!** To make your products available for transfer, you must tick the box for **Should be able to be sold on one or more websites** under **Webshop** in the **Product register**.

If you have made changes in the product register that affect products you have or intend to have available in your webshop, click **Update**. This will update the list with the new changes.

The Website settings for products button opens the website settings for the selected product.

User-defined field for products: Here you can enter a short message, which will display in the webshop for all products, for example: "All prices indicated are inclusive of VAT".

Default product group: Here you can select which of your product groups will display as default when customers visit your webshop.

Webshop Products

By clicking on **Items in your Webshop,** a window will pop up where you can easily administer which of your products you want to be available in your webshop.

You do so by highlighting the products in the above list and then moving them to the bottom window by clicking on the arrow-buttons. The items available in your webshop are those displayed in the bottom window.

Website Settings for Product

In the **Website settings for products** window, you can define settings for displaying products in your webshop. The settings window can be opened both via the **Product Selection** tab in **Edit Website - Content** and via the **Webshop** tab in the product register.

Default

Product image: You can either select **Insert picture** from the drop-down list and then click **New** in order to insert images stored locally on your computer, or you can select **Link to picture** if the image is available on the Internet. In that case, enter the address to the image in the **Picture URL field**.

> **Tip!** The product page can display the image in its original size. To do this, you must select **Detailed description** from the **Product description** drop-down list.

The **New** button opens a window in which you can browse for the image you wish to insert.

Deletes the selected image from the website settings (not from your computer).

If you have selected **Link to picture** and entered the address to the image, click **Go to WWW -page** in order to display the image in the web browser.

Product Description: You can enter two different product descriptions per product. One brief description which is displayed in the product list beneath the product list and one detailed description which is displayed when you click the **More Info.** link, the product image, or the product name.

Edit or add product descriptions. Select a brief or detailed description before clicking **Edit**.

Resets the product information to the state it was in before the last edit.

Advanced

Allow sale of less than an entire unit: If you want to sell products constituting less than one entire unit in the webshop, you must check the **Allow sale of less than an entire unit box**. The setting is available if you have defined that the product **Should be available for sale on one or more websites** and if you have chosen to use one or several decimals for warehouse units in the company settings for products. The setting can be found be going to **View - Settings - Company - Settings per Module - Product** and clicking the **Warehouse handling** tab.

> **Note!** You have to republish your website when you have defined the setting for the products you want to be able to sell in quantities less than one entire unit.

News

In the **News** tab you can enter news and articles you want published on your website. If you want the news/article to be displayed on the main page on your web site, you can tick the **Show on main page** box.

How to create a new article?

1. Click **New** to create a new article.
2. Enter **Title**, **Summary** and **Text**.
3. Format the text as you want it to appear on your website.
4. Click **OK**.

The article is now available for display on your website.

How to change order for articles?

By using the up and down buttons you can move the articles around so that they appear in the desired order.

Sub-pages

Sub-pages are separate pages on your website where you can provide additional information to your customers. Usually they consist of different pages under a major category. An example of this is a Sports page with sub-pages for Football, Athletics, Skating and Ice Hockey.

How to create a new Sub-page

1. Click **New** to create a new sub-page.
2. Enter a **Title**, **Introduction** and **Text** for the sub-page.
3. Use the editing tools in the toolbar to adapt the text to your own preferences.
4. Select the **Show in menu** check box if you want the sub-page to appear in the side menu on the main page.
5. Click **OK**.

You have now created a new sub-page.

How to change order for articles?

By using the up and down buttons you can move the articles around so that they appear in the desired order.

Tip! You can also link attachments to sub-pages.

Contact Pages

The **Contact pages** enable customers to contact your company in a simple way. When you create a contact page, you are actually creating a form, which the customers can complete online with the information you chose as necessary. Contact pages can be created for general contact, registering to receive newsletters, free catalogues etc.

You can download information entered by the customer as an activity by clicking **Get site data**. Imported activities are automatically transferred to the activity register.

By clicking **New** you can create a new contact page. Enter **Title** and **Description** in the screen that opens. The title you enter here will show in the Website menu.

Default

Select the check boxes in the **Default** tab to decide which fields are to be shown on the contact page. Select **Show** for customer information you want to show and **Required** for information that the customer must fill out.

> **Show** and **Required!** When you select a check box in the **Required** column it means that the customer has to fill out the field to proceed. If you only select **Show** the field is visible, but optional to fill out.

At the **User-defined field** at the bottom of the right-hand column you can enter other information e.g. 'Enter your message here'.

Also enter a **Reply E-mail** address for the messages. If you select **Receive via E-mail** you will receive an e-mail with information from the customer in addition to downloading the activity when retrieving website data.

> **Note!** Customers, who get in touch with you via a contact page, will receive an auto-generated e-mail confirming that their enquiry has been received. In addition to a copy of the original information they entered, the e-mail will also inform the customer that the confirmation in itself is not an indication that the query has been read or processed.

Advanced

In the **Advanced tab** you can select what **Further information** you wish to receive from the customer. From the drop-down lists you can select between the various **User-defined fields**. You can edit the alternatives from the properties register by right-clicking in the drop-down list and selecting 'Change in properties register'. Mark which fields you want to show for the contact and which information the customer is required to fill out. By selecting **Update contact** the contact register will automatically update information for existing customers.

Select which status information you require from the customers by using the check boxes. You can edit the alternatives through **View - Settings - Company - Settings per Module - Contact Management** and **Field descriptions**.

> **Tip!** Below you can link those who send information through the contact pages for a group. This will update the contact card and will make it easier to follow up the contacts later e.g. by sending a group e-mail to them.

Tools

Tools for Website Content

Icon	Description
	The **Open HTML File** feature lets you import HTML files created in other programs. In that way, you can insert HTML code which is more advanced than the one you can create in the editor. **IMPORTANT**: When importing HTML pages created in a different editor, please note that the file will not contain any images or other objects inserted into the file. The imported file will only contain references to such objects. You must insert the images manually in Mamut via the **Insert Image** button.
	Use these buttons to change the font.
	Use the button on the left to automatically number a list or the button to the right to create a bullet list.
	The **Decrease** and **Increase Indent** buttons allows you create or remove indentations in the text.
	Use these buttons to align the text to the left, centre it, or align it to the right.
	You can cut text by using the button to the left. Use the button in the middle if you want to copy text. The button to the right can be used to paste text.
	Click the **Undo** or **Redo** buttons to undo or redo the changes.
	The **Insert Table** button to the left lets you insert tables. The button in the middle lets you **Show/Hide Grid**, if you want to create a table without displaying its borders. The **Insert Hyperlink** button lets you create a link to another website. Select the text/image you wish to link and click the button to enter the target address (URL). More information can be found below.
	Click this button to insert an image. A dialogue window will open through which you can locate the file, enter a tooltip and define the image's position along with height and width. More information can be found below.
	Click the arrow to the right of the icon to choose a background colour for the text, for instance. If you want to choose a colour, a window will open in which you can select the colour combination of your choice. Click **OK**. If you select an image, you will be able to place and/or repeat the image in a new window.

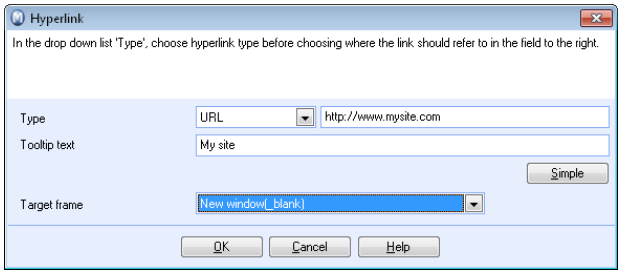
All written content for the website is created as in a normal word processing program.

Tip! By pressing **[ENTER]** a new paragraph is started; if you press **[Shift] + [Enter]** a normal line break is inserted.

Hyperlink

By clicking the **Insert Hyperlink** button, available in the toolbar on all content pages under **Edit Website**, you can insert links to other websites, internal product pages, news pages, sub-pages, contact pages, etc.

In order to create a link you must first highlight the text/image you wish to link and thereafter click the **Insert Hyperlink** button. Select what kind of link you want to insert in the **Hyperlink** window.



In the **Tooltip text** field, you can enter a text describing the link when the visitor places the mouse pointer directly on the link.

By clicking the **Advanced** button, you can specify a **Target frame**, which means that you can choose if you want the link to open in a **Standard Frame**, **New Window**, **Parent Frame**, **Same Frame** or a **Top Frame**. As the administrator, you will be able to customise your website.

Tip! You can also enter a link directly into the text, for example www.mamut.co.uk. The text will automatically be converted to a link.

URL: Enter the URL of the website to which you want to link. http:// is predefined; all you have to enter is the www address.

URL stands for Uniform Resource Locator and provides a description for the way documents and other resources on the Internet are addressed. E.g. your website with Mamut is addressed the following way: http://www.mamut.com/yourcompany. This URL consists of a prefix http:// which means that the address is for a page on a web server, while mamut.com is the domain for the web server. After this, a catalogue name and file name might follow, e.g. /yourcompany (where your pages with Mamut are).

Product: Link to a product page by clicking the search button and locating the product. If you want the product to be added to the shopping cart when the link is clicked, select **Add to shopping cart automatically**.

Note! This feature will not work identically when selling the main product of products with variations. The visitor will instead be referred to the variation page.

News: Link to pages containing news/articles.

Sub page: Link to any of your sub pages.

Contact page: Link to any of your contact pages.

Product group: Click the search button and locate the product group in the overview containing all groups and sub-groups.

Attachment: Link to existing attachments on your website. If you want to insert a new attachment, first click the search button and then **New**. Locate the file on your hard drive.

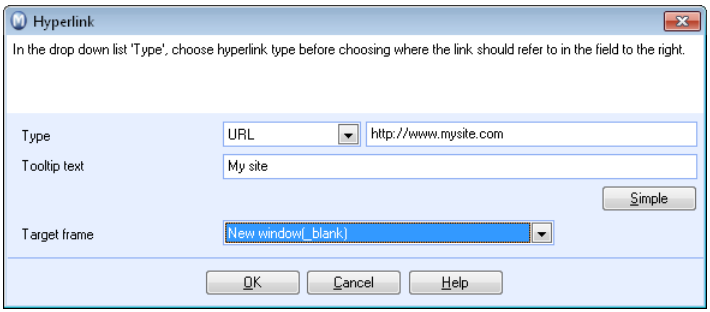
Website: Link directly to the Main page, the News list, the Campaign page, the Login page, Alert a friend or the Site map page.

Note! The options may vary, depending on your program version and add on products.

Inserting Hyperlinks

How to insert a hyperlink

1. Select the text (or image) you want to link.
2. Click **Insert Hyperlink**.



3. Select **Type** from the drop-down list.
4. Enter the URL or select what you want to link to from the drop down list to the right.
5. Click **Advanced** if you want the link to open in another way than default.
6. Click **OK**.

After you update your website you will be able to click on the hyperlink, which will take you to the linked item/place.

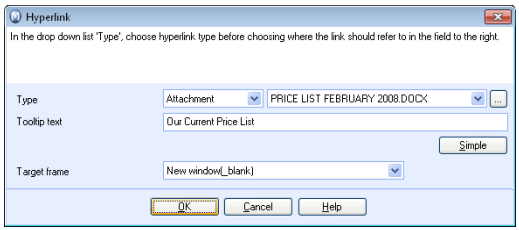
Inserting Attachment

It can sometimes be useful to publish documents containing large amounts of information as downloadable attachments instead of publishing the text on the website. An attachment can, for instance, be a price list in Excel format, large Word* documents, or information booklets in PDF format.

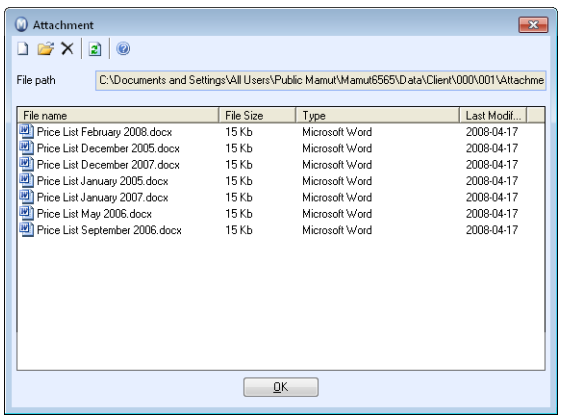
You can insert attachments in your website by using the **Insert Hyperlink** feature.

How to insert an attachment

1. Highlight the text you want to link to the attachment.
2. Click **Insert Hyperlink**.



3. Click the search button.
4. Click **New**.
5. Locate the document you wish to insert as an attachment.



6. Click **OK**.
7. Highlight the document.
8. Click **OK**.

The attachment is now linked to your specified sub-page and can be accessed by all visitors as soon as you have republished your website.

* Microsoft Excel®, Microsoft Word®.

Tip! You can inform visitors of the attachment format, so they know which application is needed to open the file. For instance: "Click here to download a PDF catalogue".

Inserting Images

The **Insert image** allows you to add images to your website. Mamut supports the graphic formats JPG, GIF and BMP. JPG is used for images of high quality with many colours while GIF is a format that is used for images with fewer colours. You should think about this if you have limited storage capacity on your server or if you have customers with line capacity or modem.

One tip is to insert images which have the same colour as the design theme you have chosen. In this way you can influence the design of your website.

Before you insert a picture, make sure that its file is stored locally on your computer and that it does not contain special characters or spaces.

How to insert an image

1. Go to **View - E-Commerce - Edit website - Content**.
2. Click the **Insert** button to add images. This opens the **Image properties** window.
3. Specify the location of the image on your hard disk in the **Image source** field. You can also browse to find the file by clicking the button with three dots to the right of the field.
4. Use the **Tooltip text** field to insert a 'tool tip' for the image. This is a small explanatory text (in a yellow sticker), which appears on the screen when you move the cursor over the image.
5. You can select where you want to place your image in the **Position** field.
6. The **Width** and **Height** fields allow you to adjust the size of the image.

   Note! There may be a reduction in image quality when you use this function. To retain the highest image quality, you should edit the size of the image using image processing software.
7. Click **OK**.

   The image will now display on the page when you have updated your website.

Inserting Tables

It is often useful to create tables in order to structure the information in the website. Tables can help you place images and text exactly where you want it as opposed to not using them. If you want to place text next to an image, this is more complicated without tables. In Mamut you create tables by clicking on the **Insert table** button.

How to insert a table

1. Go to **View - E-Commerce - Edit website - Content**.
2. Click **Insert table**.
3. Enter the number of rows for the table.
4. Enter the number of columns for the table.
5. Select which **Position** the table will have on the web page. Select between **Left, Right** or **Centre**.
6. Select **Heading** if the table will have one.
7. Tick the **Show table outlin**e box if you want to display a visible outline for the table on the web page. By default, this is not selected, since tables usually display better without frames.
8. Click **OK**.

   The table will now display on the page.

Show/hide gridlines

It may be difficult to enter information into the table if you have chosen not to show the borders. This can be resolved by clicking the **Hide/show gridlines** button. You can then see the borders when entering information. To remove the borders click the same button again.

Opening HTML Files

By using the **Open HTML file** option you can import HTML files created in other programs. That way, you can insert a more advanced HTML coding than what is possible through the editor.

How to open HTML files

1. Click **Open HTML file**.
2. A warning is displayed notifying you that by importing HTML files, you will overwrite all content on the active page will display. Click **OK.**
3. Browse to the HTML file you wish to insert.
4. Select the file and click **OK**.

   The content of the HTML file will now show on the page you imported the file to.

Important! When you create a HTML page you have created in another program, it is important to remember that the file will not upload images or other objects you have in the file, but have references for them. There will be saved space for them, but you will have to manually insert them to Mamut by using the **Insert Image** button.

Design

Design Templates

In **Design templates** you are able to decide on the layout and colour options for your website. The design templates are arranged according to tabs, one for the website and one for the webshop.

Tip! The web design templates are regularly updated and can be downloaded to the program. The program will automatically search for updates, when you choose to edit, preview or update the website, and you will receive a message informing you when updates are available. Read more under "Update Website" about how to run these updates.

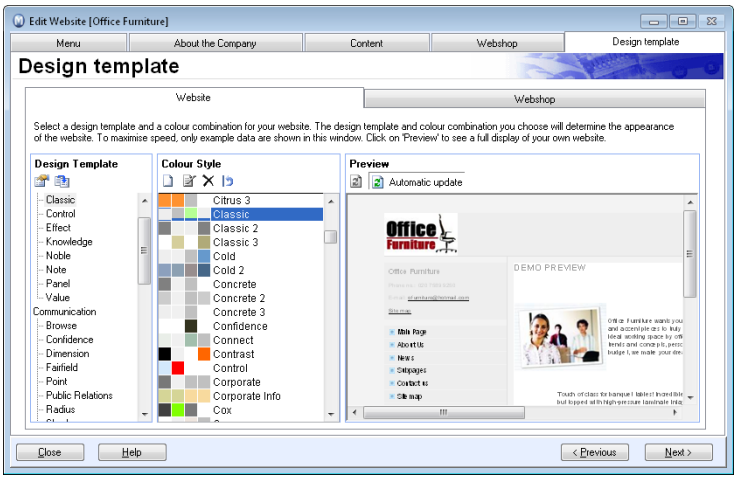
Colour Scheme, website

By using design templates you can give your website a uniform design based on a specific theme or form.

How to decide the colour scheme for your website

Select **Design template** in the left-hand window. To use frames, select this under **Template Properties**. Select the **Colour style** you wish to use.

You can also create new or edit existing colour schemes as well as resetting to default. Read more about to create new colour combinations below.



Check the preview of the design template and colour scheme you have chosen. The preview will automatically update when **Automatic update** is activated. If this has been de-activated, click **Update** to see the changes.

Note! This is only a preview of a sample template and not an actual preview of your website.

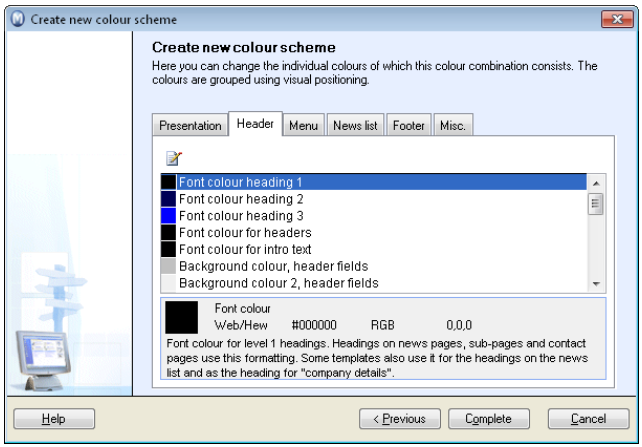
You can update the website by clicking the **Update website** icon.

Creating a new Colour Scheme

Defining your own colour schemes allows you to give your website a personal touch that corresponds with the rest of your company profile. This can be done using a wizard where you can either create a colour combination from scratch, or create a colour combination based on an existing colour scheme.

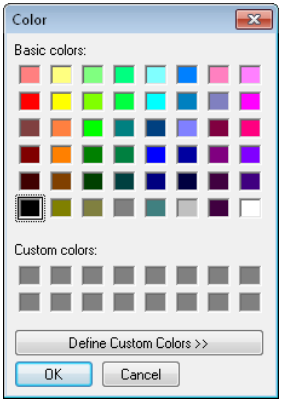
How to create a new colour scheme

1. Select **View - E-Commerce** - **Edit Website** - **Design template**- **Website**.
2. Click **Create New Colour Scheme**.
3. Enter the **New colour scheme name**.
4. If you would like to start off from an existing combination select to **Copy colours from existing colour combination** and pick the colour combination you want to copy the colours from.
5. Click **Next**.
6. Select the desired colour field. Each colour field has been sorted into several tabs according to its position on the website. Choosing a colour field provides you with extra information about where the field is on the website and colour codes for the selected colour.



7. Click **Change value of selected colour**.

8. Select the colour you wish to use from the colour chart. To define your own colour, click **Define Custom colours**.



9. Repeat the steps above for all of the fields you want to change.
10. Click **Complete** to save the new colour combination.

You have now created a new colour scheme which will be available from the list.

Tip! You can reset colours to the original departing point in a colour combination by clicking the **Reset** button.

Template Properties

In template properties you can decide if the design template you selected will use frames or not, as well as which font type you will use in menus and body text on your website.

Design templates that use frames by default will be checked but in some cases it is possible to override this manually. This also applies to design templates which do not use frames. Default settings are usually selected by what suits a module best, but you can override if you wish.

Advantages with using frames

- It is easier to navigate especially where there is much content on each page. The navigation menu will not move when you scroll the content (depending on the navigation menu's placement).
- Provides clearer page dividing.
- You can select among certain fonts that are suitable for websites. The fonts are used in the menus and contents of the website.

Advantages with not using frames

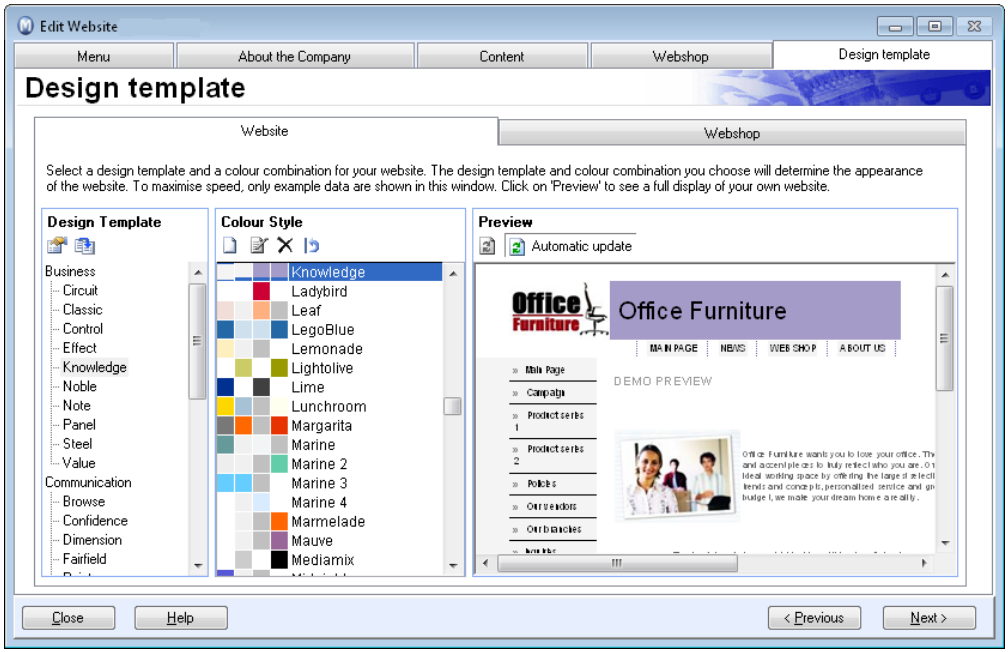
- You avoid scroll bars if there is not much content on the page.
- Often provides a cleaner design.
- The content is ranked higher in search engines.

Design Templates, webshop

Use design templates to give your webshop a uniform design based on a specific theme or form.

How to determine the visual appearance of your website

1. Select a design template by clicking on one of the template names.
2. Specify the colour for the various colour fields and text.
   All templates contain predefined colour schemes, but you can also define your own colours.
3. Click **Next** to check a preview of your webshop in the field at the far right. You can also choose the size of the preview by zooming in and out using the **Zoom** function.
   You can also preview the webshop in a web browser by selecting **Show in browser**.



Once you are happy with the appearance of your webshop, you can create a website and webshop from here by clicking on the Update website button.

How to change the colours in your webshop

1. Click on the text in the list for the colour description you want to change.
2. Click the **Edit** button.
3. Select the colour you wish to use from the colour chart. To define your own colour, click **Define custom colours**.
4. Click **OK** to save your changes.
5. Repeat the steps above for all of the fields you want to change.

Once you have changed the colours for your webshop, you must run a Full update of your website in order for the new colours to be visible on your website.

Tip! If you wish to undo a colour selection, you can select the colour and click **Reset** in order to revert to the original colour.

Webshop

Product Groups

In the **Product Groups** tab, you can define settings for what will happen when you click a product group or sub-group in the webshop. Every product group and sub-group can be displayed in a separate customised page.

Note! This feature is only available as an extension of the program versions E3 and E4. The functionality is included in the program version Mamut Enterprise E5.

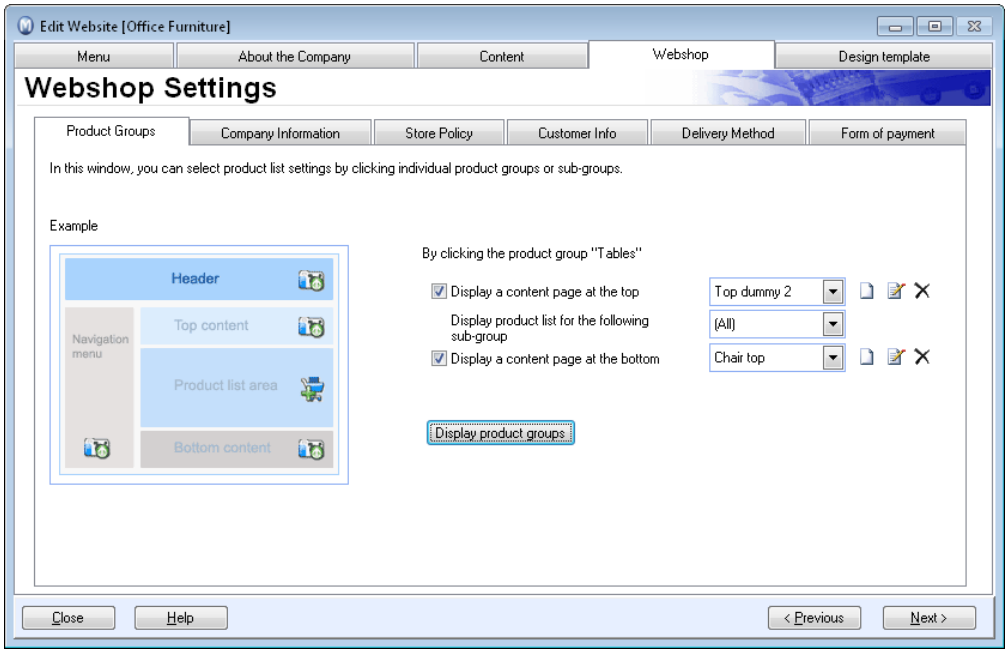
The page which the customer will see in the webshop when clicking a product group or sub-group consists of several different elements. The elements are header, left-side menu and product list. You can also display a content page above or below the product list.

A content page can be used to present campaign products, new products or general information about the product group or sub-group. It can also contain **Add directly to shopping basket** links or general information about the product group or sub-group.

If you want to **Display a content page at the top**, check the box and click **New** in order to create a new content page. If you want to edit or delete a content page, select the page from the drop-down list and click the button representing the action. The **Display a content page at the bottom** feature works in a similar way. The only difference is that the content page is placed below the product list. You can create new content pages for each individual product group and sub-group, but you can also use the same content page for several groups.

When highlighting a product group, you will be able to **Display product list for the following sub-group** (select the relevant sub-group from the drop-down list). The sub-group's product list will be displayed when the customer clicks the product group in the webshop. You can also open other sub-groups from this view.

Note! Products not placed in a sub-group will always be displayed when clicking the main product group; otherwise it will not be displayed.



The **Display default graphic example** gives you a preview of how the content is structured. When you have chosen to display the default graphic example, the button will change name to **Display product groups** and will direct you to the product group view.

The content pages will be displayed when you click one of the product/sub-groups in the webshop. You can choose to display the page above or below the product list. New content pages can be created by using the drop-down lists in the **Product Groups** tab, in the **Webshop** tab in the **Edit Website** module.

Tip! If you are using a webshop template that displays all products in all sub-groups when clicking the product group, you will be able to select **(None)** as sub-group and instead create your own content page containing a customised selection of products. This feature can be combined with the **Add directly to the shopping basket** feature. By doing so, you will reduce loading time while retaining mobility within your webshop.

Company Information

Here you select what type of information about your company you want to display in the webshop. The information will be retrieved from the Company Information registration form/tab.

Webshop Policy

This is where you set policies for purchase, payment, return, delivery etc, and all other conditions you want to inform customers about when shopping in your webshop.

Policy types are created by clicking the **New** button to the right of each drop-down list. You can enter Title, Summary and Text to describe the policy.

According to EU directives, the policies for shopping online must be presented to the customers before they enter their personal details. Select the following: **The customer must accept "the conditions" in order to shop in the Webshop**.

> **Note!** In addition, the policy must be shown on the order confirmation if possible. This is selected by ticking the box for **Show conditions on the order confirmation and in the E-mail that is sent to the customer**.

Click the button on the top left to enter settings for the website. The settings window opens where you can set up user-defined lead texts for your website.

Customer Info

In the **Customer info** tab you can select which fields to show when customers shop in your webshop. Under each of the tabs you decide which fields to show and which fields are obligatory to fill out. If you select the **Required** column, the text box will be marked with a red star, meaning that the customer cannot complete the order without having filled in this field.

By using the two categories **Domestic purchase** and **International purchase**, you can distinguish between information that is required from domestic and international customers. You may, perhaps, wish to have phone numbers for domestic customers but not for international ones.

At the bottom of the window you may overwrite the text which appears at the top and bottom of the webshop's main page. You do this in the **Top text** and **Bottom Text** fields.

Click the button on the top left to enter settings for the website. The settings window opens where you can define user defined lead texts for your website.

Invoice Address

Customers often wish to be invoiced to a different address from the delivery address. For this reason, it is possible to create separate fields for the invoice address. It is also possible here to distinguish between domestic and international customers.

Delivery Method

In **Delivery Method** in the Webshop area you decide which delivery methods are available in your webshop. In order for a customer to complete a purchase in your webshop, you must register at least one method of delivery available for your online customers.

Click **New** to create a new method of carriage or click **Edit** to change an existing one.

Tip! In help (F1), you can find more information about creating and editing methods of carriage.

Form of Payment

This is where you specify which methods of payment can be accepted in the webshop. In connection with this, you should consider which methods are easiest and most secure for customers and your company.

If you offer payment by credit card, you can also specify that the customers need to enter a **Security code**. This code is only visible on the actual credit card, and makes it impossible for others to shop from the account without having the card itself in their possession.

If you offer payment by Solo and/or Maestro card, the customer will also be able to enter the **Issue number** and **Start date** in addition to standard credit information such as card holder's name, card number, expiry date etc. This information will be available in the **Credit card** window in the order module to where new web orders are imported when you get website data.

Click **New** to create a new method of payment. This opens the Terms of payment window.

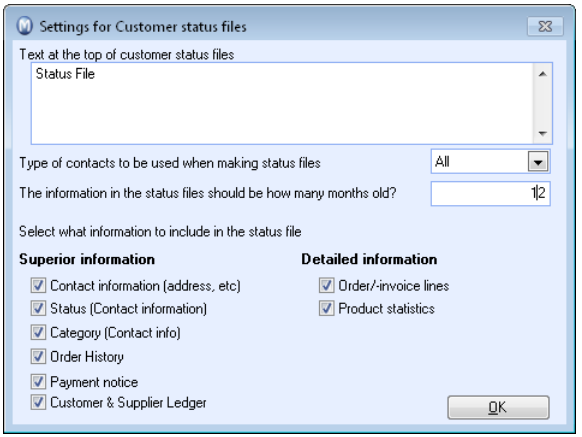
Tip! In help (F1), you can find more information about creating and editing payment forms.

Customer Status Files

The settings for customer status files can be found under the module settings for Contact management. You can also reach the settings via the **Edit website - Menu** shortcut.

How to get started with customer status files

1. Go to **View - Settings - Company - Settings per Module - Contact Management** and then click on the **Advanced** button and thereafter on the **Status File Settings** button.



   Select which information should be included in the customer status files.

2. Ensure that you have registered a sender address. Sender addresses are required and are retrieved from the **E-mail** field in the top half of **View - Settings - Company**.
3. Select which customers you would like to receive customer status files. The settings for this are situated in the Contact card under the Settings tab. Click on the **Customer** button and select **Yes** or **No** from the **Auto generate status file** drop-down list.

   Note! By default this field is set to **Yes** for all customers.

4. Enter a title for the e-mail to be sent to the customer. This is done by going to **View - E-Commerce -Get website data,** clicking on **e-mail** and entering a title. You can also enter text at the top and bottom of the e-mail. The title is required in order for you to be able to send the customer any files. What you enter here will be saved until the next time you run the wizard.

   You have now got everything ready for sending the customer status files. These can be sent manually or as part of the Get website data routine.

Sending contact status files

How to send a customer status file manually

When you send a customer status file, an e-mail is being sent to the customer. This e-mail contains a link to an html-site, which the customer can open by clicking on the link. The page displays the information that you specified under the customer status file settings.

The customer status file can be sent to your customer by clicking on the **Send E-mail** button in the Contact register. This will open the e-mail editor in the usual way. Now you need to select **Status e-mail** as the template for this e-mail. Selecting this template will automatically include the customer status files as an attachment. The content of the customer status file depends on the selections described below.

Automated customer status files

Automate customer status files give the opportunity to keep your web customers updated about the progress of the order with information on the date of invoicing and delivery and more. The system allows for certain flexibility so that you can customise the functionality according to your needs.

When the status of a web order is being changed, a new **Customer status file** is generated automatically. For example, this would happen when you invoice a web order or click on **Get website data**. These actions will trigger the sending of information to the server to inform it that the order has changed status from 'order' to 'invoice' and a separate site is created for this on the Mamut server. For automated customer status files the status file is sent as an e-mail to the customer and contains a unique link to the 'status' of the customer's order. In these cases, the content is located on Mamut's server. The remaining e-mail content can be edited according to a template, which is stored under **Get website data - E-mail**.

The window this opens allows you to add any relevant information such as, for example:

'*Your web order has been processed. All our web customers receive an automated notification to let you know that we have despatched your order items. Follow the enclosed link to view your current order status. Thank you for shopping with us.*'

When are customer status files being generated automatically?

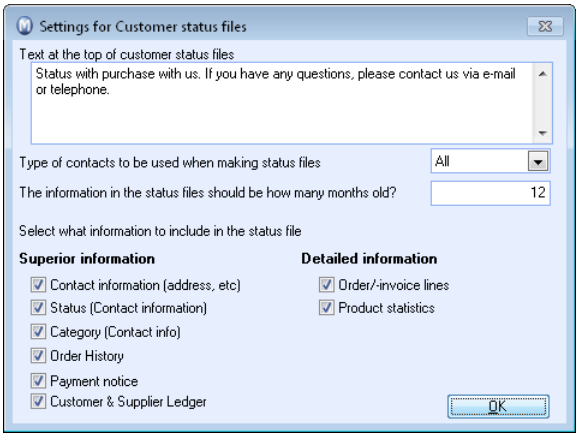
The prerequisite for the automated generation of a customer status file is that you have changed the status of a web order and downloaded the website data. It is also necessary that the contact has been set to receive customer status files. The most common occurrence of automated customer status file generation is when you have invoiced a web order and then click on **Get website data**. The customer status file will also be generated/sent after crediting an invoice, cancelling an order, part-delivery of an order or at generation of a credit note. It is important to remember that customer status files will not be generated before you click on **Get website data** following any changes you have made to a web order.

Contact Status Files Settings

Based on the settings in this window, you select what information is to be made accessible to customers.

You can access the settings under **View - Settings - Company - Settings per Module - Contact Management - Advanced - Status File Settings.**

The **Text at the top of contact status files** is displayed at the top of the contact status file. Examples of this include: '*The status of your purchases from us is attached. If you have any questions, please contact.....*' Please note that this is the content of the home page. You can also edit the content of the e-mails your customers receive. This is done via the **Get website data** wizard.



In **Type of contacts to be used when making status files** you can select 'All', 'None', 'Only private individuals' or 'Only companies'. The Type of contact is set in the **Other Info** tab in the contact card.

In the **Settings** tab of the contact card, under **Customer**, you can also control whether the contact is to have an **Automatically generated status file**. This will override the settings in this window.

The information in the status files should be how many months? You can use this field to adjust how old the information in the contact status file will be.

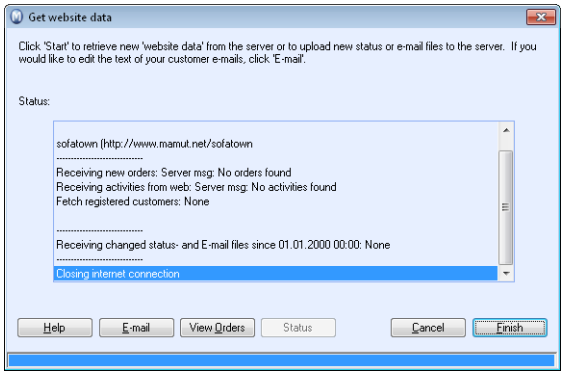
You can also select which information to include in the contact status file by using the various check boxes at the bottom of the window.

Get Website Data

Get website data is used to retrieve enquiries and orders that customers have made on your website.

Enquiries are subjected to a so-called 'data wash' where information from the website is compared with entries in your contact register. You can approve the information that the customer has registered to avoid double entries cluttering up your contact register.

You will find the function under the menu **View - E-Commerce - Get Website data.**



The window gives you the following options

E-mail: Opens a window where you enter the E-mail content..

View orders: Opens a preview of all previously loaded activities, which you can access and examine in detail.

Start: Downloads new orders and activities from the website.

Downloading data

1. Click **Start** to begin downloading data. The program will now connect to the Internet and find any new orders and activities.
2. The result will be continuously displayed in an overview window. If the search found no results, the window closes when you click **Complete**.
3. Click **Next**.
4. Check all enquiries and import or reject them in **View new orders/activities**. If you do not process all the enquiries immediately, they will still be available next time you import data.

If you downloaded any orders and activities these will be available in the Sales and Invoicing Module and Activity Module respectively.

Note! Registered users will have a **Website account** created. You can edit this through the **Contact register** via the **Settings** tab in **E-Commerce**.

Customer Information/Address

This window shows detailed information from Get website data, together with an existing or potential customer from the Contact register. Each field shows data registered in the Contact register under **Contact overview**, corresponding fields from **Incoming data** and what will be imported under **Result**.

The enquiry can be dealt with in one of the following ways

Click **Reject** if you want to ignore the enquiry. It will then be deleted from the database.

Click **Contact list** to link the import to another contact.

Click **New** to create a new contact in the contact register on the basis of the import.

Click **Import** to update the contact register with information from the enquiry.

Read more about the various options below.

Adjusting the import

1. Check the data from the **Contact overview** against the **Incoming data**.
2. Select which of the texts is to be updated in the **Contact Register** under **Result**.
   If none of the suggestions are suitable, you can also enter new information straight into the field.
3. Repeat the process in all the tabs: **Company information**, **Address** and **Additional info** (only for activities).
4. Click **Import** to update the contact register with information from the enquiry.

   The Contact Register is now updated with the included information.

Linking the imported contact to another contact

1. Click **Contact list**.
2. Select the contact to which you want to link the enquiry.
3. Click **OK**
4. Go through all the fields and adjust the import as described above.

   The information is now linked to the specified contact.

Creating a new contact from the imported contact

1. Click **New**.
2. Go through all the fields and adjust the import as described above.

   The customer is added to your Contact Register.

View New Orders/Activities

After importing website data, you receive a list of all the enquiries. The column on the far left of the list specifies whether the enquiry is an activity, an order, a new registration or a change to a previous registration.

Each enquiry is checked against the contact register. If the contact has not been previously registered, a new contact will be set up. If the contact already exists, the information from the contact register is displayed under **Contact overview**.

Checking an enquiry

1. Check all enquiries, depending on their **Status**:
   New customer: No contact was found in the contact register which matched any of the fields in the enquiry.
   Should be verified: An existing customer was found with the same **E-mail address, Postcode**, Contact person or **Telephone number**. Here you should verify which information should be overwritten in the contact register.
   Existing customer: The enquiry contains a **Company name** or **Company reg. no.** which corresponds to a contact in the contact register. It is highly likely that the enquiry comes from this contact.
2. Click **Edit** or double click on enquiries you are uncertain about to check what Company information is imported.
3. Click **Import all** when you have gone through the information.

Note! At the bottom of the window is a line about whether you should **Go directly to update in order to update stock after importing order.** This is a recommendation/reminder that you should update the website to avoid discrepancies between the stock levels displayed in the webshop and actual current levels.

New customers are now created in the contact register. Existing customers and Probable customers will keep the information from the contact register unless you choose to overwrite it.

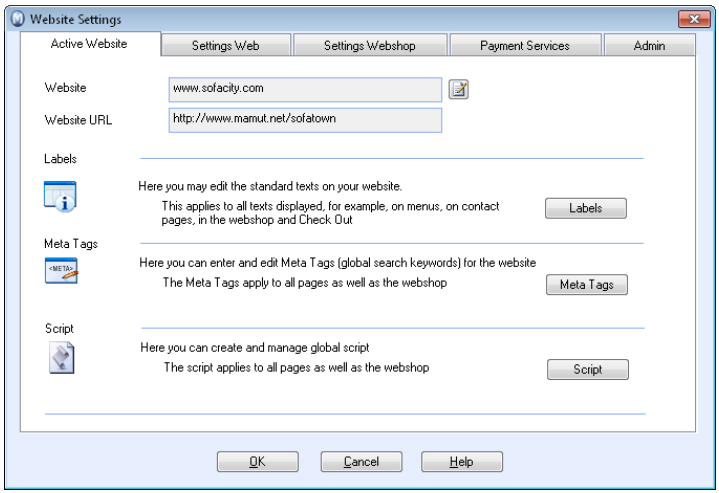
Note! You will find the imported orders in the Order module in Mamut. You can also print a report of all web orders. To do so go to the Report modules, select Sales and Invoicing and select the report **Order/invoice list** or **Order/invoice list, detailed.** In the **Filter** window that opens, tick the **Web order** box in the selection window to only show orders imported from the webshop. If you have several websites, you can also select to view results for a certain website only.

Website Settings

In **Website Settings** you are able to select which settings you want to apply to your website and webshop. What tabs are available depends on the type of program and supplementary licences you have. You can access website settings from the menu **View - E-Commerce - Website Settings**.

Active Website

In the **Active website** you can edit the name of your website if needed. You can also edit **Labels**, insert **Meta Tags** and **Script**.



How to change the name of your website

1. Go to **View - E-Commerce - Website Settings - Active website**.
2. Click **Edit**.
3. Enter the new name.
4. Click **OK**.

Your website has now been given a new name.

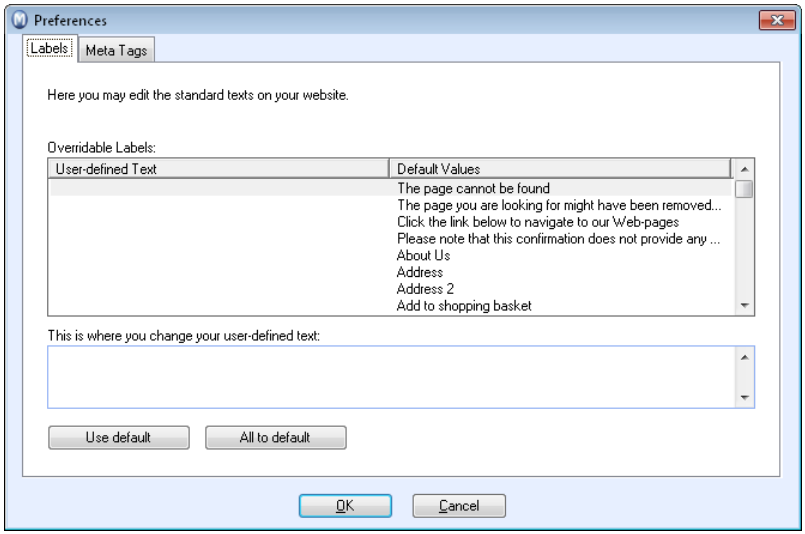
Note! The website name change will only display internally in the program and will not influence your web address in any way. If you would like to change your web address as well, you need to de-register your website and the re-register it with the new address. You can deregister your website by going to **Website Settings - Admin**.

Labels

In Mamut, you can customise headings and texts on your website to suit your specific needs. You can, for instance, edit texts that describe fields, links, drop-down lists, etc.

How to edit Labels

1. Select **View - E-Commerce - Website settings - Active website** and click the **Labels** button.



2. Select the text you want to edit from the **Default value** column.
3. Then activate the **This is where you change your user-defined text** field.
4. Add the text you wish to use instead of the default value. If you want none to show enter * in the field.
5. Click the default text in the **Default values** column.
6. The value (text) you entered is added in the **User-defined Text** column.
7. **Update website** to publish the changes you made.

Your changes will show on your website after you have updated it.

Tip! If you regret any of changes you have made, you can select the relevant text and click the **Use default** button. If you wish to change all overwritten labels to default values, click the **All to default** button.

Search Engine Keywords

In the **Meta Tags** tab, you can enter information about the website, such as keywords, description, title, etc. Many search engines read Meta Tag information and rank the websites accordingly. Some search engines do not utilise registered Meta Tags.

Enter the tag name in the **Name** field, for example: KEYWORD, DESCRIPTION, AUTHOR, TITLE, CONTENTS. In the **Content** field, enter the value, for instance, the keywords.

Note! Use comma to separate the keywords.

Note! Please note that not all search engines utilise Meta Tags.

Tip! You can enter both English and foreign language keywords, if you are selling to customers across national borders.

Registration in a Search Engine

So that your website will show when a relevant search is made online, you need to register your website first. The registration of your website at the Search Engine is free. However, it is important that you read the instructions carefully when registering. Below is a list of selected, popular search engines.

www.altavista.co.uk

www.live.co.uk

www.ask.co.uk

Script

By clicking the **Script** button, you will be able to insert your own script or script from a third-party provider.

By using script, you can set up a web traffic counter with providers such as Google Analytics. A web traffic counter can be used as a tool for tracking and analysing the normal traffic on your website as well as incoming web traffic from Google AdWords web ads. In order to start using these tools, you need to enter a script attained from the web service provider. You can also enter your own script.

Placing the Script

HTML <Head> tag: Default location of script. The script is placed before the </head> tag in the HTML code.

On top in HTML <Body> tag: The script is placed after the <Body> tag in the HTML code.

On the bottom in HTML <Body> tag: The script is placed before the </Body> tag in the HTML code. This location is used by Google Analytics, among others.

Note! The software vendor does not provide user support for third-party script.

Settings Web

In **Settings Web** you can set the following website settings:

Use website/webshop should be selected if you do not wish to use the website but only the webshop.

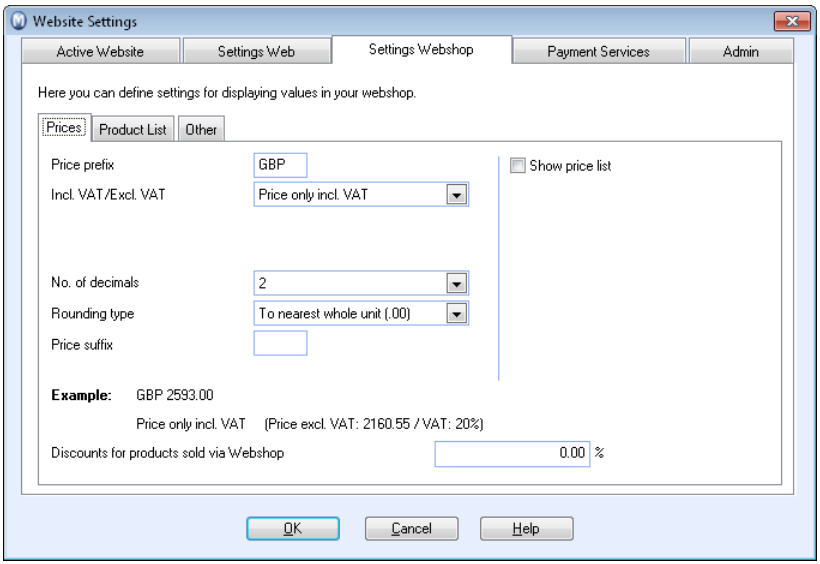
Website area links to: If you selected **Webshop** from **Use website/webshop**, you can select here if your registered area will link to your Mamut webshop or to an external domain.

Sitemap: Here, you are able to select if you would like a link to a sitemap on your website. A Sitemap is a separate website which contains information regarding categories, content along with all web pages contained within your website. Viewing of the sitemap on your website will help both visitors and the search engine to gain a better overview of the contents of your website.

Note! Sitemap is developed according to the standards for search engine optimisation. Mamut uses xml-based sitemap index files to index all customers' websites. These indexes are automatically and regularly submitted to Google, so the user does not need to think about it. Furthermore, xml-based sitemaps are used by other big search engines such as MSN, Yahoo and Ask.

Settings Webshop

In the **Settings webshop** tab you define settings for e.g. displaying prices in your webshop. In the **Example** field at the bottom of the screen, you can see how the various settings will be displayed.



Prices

Price prefix: The currency code specified in company database settings (financial settings) is suggested. If you wish, you can change this. If you prefer the currency code to appear after the price, you can enter it in the **Price suffix** field below.

Incl VAT/Excl VAT: Choose whether the prices are to be shown as gross or net. Wholesale prices are quoted without VAT, as they are usually able to reclaim the VAT in their own turnover. Retail prices are usually expected to include VAT.

Rounding type: If you select to show prices as whole currency units, the orders from the webshop will also be rounded. This is done regardless of settings in the Sales and Invoicing module.

No. of decimals: Select how many decimal places you want to show in prices. The higher the unit prices, the less usual it is to include decimal places. The rounded prices will also be transferred to the order.

Price suffix: If you wish, you can also add a suffix after the price, such as GBP, Euro or similar. If you select to show prices without decimals, you can add a suffix, e.g. '.-', after the price. If you also wish to use **Price prefix**, both may be added.

Discount for products in the Webshop: Here you can specify the general discount available on all products in your webshop.

Show price list: Tick this box if you want to display a price list in the webshop.

Product List

Here you can define the appearance of the product list in your webshop.

Optional display of VAT in product list: Select this setting if you want to add a check box to your webshop, where the user can decide if he wants to see the product prices with or without VAT.

Maximised image width in the product list: The standard is 100 pixels.

Create a product page for all products: Select this setting if you want to add a link for each product in the product list. When clicking this link, a separate page with product details opens.

Customer communication

Here you define the exact conditions for order e-mails which the program sends automatically to your customers as soon as there an order has been changed.

Please be aware that you need a special licence to use this functionality.

Other

Graphic display of stock status: To view stock status in your webshop you can select between three icons. To view stock status you will have to select stock status to show on the product card through the **Web settings**.

Format for auto-generated e-mails: Some users may come across the problem that e-mails sent from their webshop get caught in the recipient's spam-filter or that the recipient, for security or other reasons, does not allow for HTML-display in e-mails. In this field you can select to send pdf-attachments, HTML-attachments or HTML directly in the body text. You can also select to display your company logo. In order for this to work, you need to select a logo under **View - E-Commerce - Edit website - Edit company information - Company Information**.

For products with variations: You can select this box if you want to show a link to the selection of variations in the product list.

Payment Services

If you would like to offer payment by credit/debit card in your webshop you need to have a Mamut system containing Shopping cart functionality. Additionally, you will also need to enter into an agreement with a payment service provider.

Payment service provider's act as web based payment terminals, which take care of the entire payment process when a customer in your webshop wants to pay by credit/credit card. The payment service providers ensure the security of the transaction against fraud or other types of problems.

Read more about which payment Service providers (PSP) are accessible under "payment services for the webshop".

Select Payment Service: When you have entered into a contract with a payment service provider you can select the appropriate provider from the **Select Payment Service** drop-down list. You then need to register an **ID**, which you will have received from the provider.

To receive credit/debit card payments from your webshop you will also need to set up one or more credit/debit card types in Forms of payment.

Note! You need to publish your website again after you have made your payment services settings and set up your forms of payment to make the payment solution available on your website.

Admin

In the **Admin** tab you are able to register and de-register your website and you can bind or unbind a domain.

Register Website: By using a wizard you enter company and contact information and decide the name of your website.

Deregister Website: If you wish to deregister your website click here. Be aware that your website will be deleted from the server and you will lose e.g. statistics and orders that have not been updated.

Bind/unbind domain: If you want to bind a Mamut/Active 24 domain with your website click here. You can also use this button if you want to unbind a linked domain.

Password Settings

Note! This tab will only show if you have a licence for the additional product Mamut Enterprise PartnerWeb.

You can offer your customers to create their own user account, with a user name and password for accessing your website. Registered customers can view discounted prices available to them and do not have to enter information every time they shop.

In this window you select which components of the website will be password protected, and whether customers will be able to create their own user account.

In help (F1), you can find more information about password settings.

Additional Products - E-commerce

If you require more advanced functionality than what is included in your Mamut program as standard, you can purchase additional products and extensions for your program.

There are a number of additional products, which offer extra functionality connected to your website and webshop. Domain and E-mail accounts can be used regardless of which Mamut program you are running, the other additional products require that you own a program version from the Mamut Enterprise series.

You can find out more about Mamut's additional products and services at www.mamut.co.uk/addons.

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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.

Note! Mamut One is only sold in combination with Mamut Enterprise and Mamut Office. In order to start working with Mamut Online Desktop, you must first install one of these programs. In this documentation, Mamut Enterprise and Mamut Office are referred to as Mamut Business Software.

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.

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.

Best of luck with Mamut Online Desktop!

What can Mamut Online Desktop do for you?

The following services are available within Mamut Online Desktop

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.

Contact: 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.

Online Time Management: 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.

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.

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.

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.

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.

Mamut Online Survey: 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.

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.

Activity and 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.

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.

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.

Note! Additional licences can be purchased for Mamut Online Desktop that give you access to some of the areas mentioned above. To find out more, visit our home page.

Service and Support

Mamut Service Agreement

The service agreement gives you the right to make use of the Mamut Support Centre. Find out more about the Mamut Service Agreement below.

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 utilise this feature within 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. Once you have navigated to the **Download** page you will find a link to **Add-on products – Documentation & Guides** where you will find useful manuals and guides relating to Mamut's Enterprise Extensions and Additional products.

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.

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