

// Mamut Business Software

Settings, Reports and Filters



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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: User Interface

In this chapter:

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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 on sales@mamut.co.uk or by phone on 0207 153 0900.

Getting to know the Program

Finding your way around the Program

A program that is completely new to you can easily become confusing. The program will contain screens you are not used to working with, and buttons and menus with names and contents you may not recognise. A modern system also contains many different user options, and thus at times, you may need to create many settings.

We are trying our utmost to make the use of functions within the program, as easy as possible for you. However, in order for everyone to get the most out of the program, the functions are able to be customised to match the requirements of an individual user. This applies both to which functions work, and also to how screens, buttons and menus are displayed for each user.

Below is more information about the various elements found in the program screens.

The Main Menu



At the very top of the screen you will find the Main menu. The Main menu covers the upper field of the window, and consists of five different headings: **File**, **Edit**, **View**, **Window** and **Help**. You can reach all functions in the program via this menu. It is also this menu that is being referred to throughout the documentation when explaining how to find the various functions. The reason for this is that the Main menu is 'fixed'. Below you can discover how to reach the functions via various shortcuts. Many shortcuts can be edited, making access to those functions you use most often, both quicker and easier.

In the main menu/menu bar at the top of the screen you can activate keyboard shortcuts by pressing [ALT]. You will see an underscore below one letter for each of the menu bar options. This letter is the shortcut key for activating the related menu.

The Desktop

By desktop we mean the 'background' in the program, which is constantly displayed behind the various module windows you are opening. The desktop is not the same as the Windows-desktop, where you can find shortcuts to programs, files and other items on your computer.

The desktop will give you an overview of the information flow throughout the various components of the program. It will also give you direct access to status information for every focus area - you define what this information should be. All of this offers you a quick overview and increased control. In addition, the desktop acts as a web browser, giving you access to up-to-date tips, offers, and other user information that can help in your daily work.

It is easy to make adjustments, so that the desktop best fits your way of working.

Focus areas

The focus areas on the left-hand side of the desktop provide quick access to sets of functions that are naturally connected to one another.

For example, when you click on **Customer Service** in the left-hand menu, the main window to the right will display buttons for the various functions within the module. These are organised according to their relationship to one another and illustrate the process flow within the module. Clicking on the buttons will open the relevant module.

Modules

By **Modules** we mean a set of functions that are naturally connected to one another. Most of these will be accessible from the **View menu** as individual choices. An example of a module is all of the functions found under the **View - Contacts** menu.

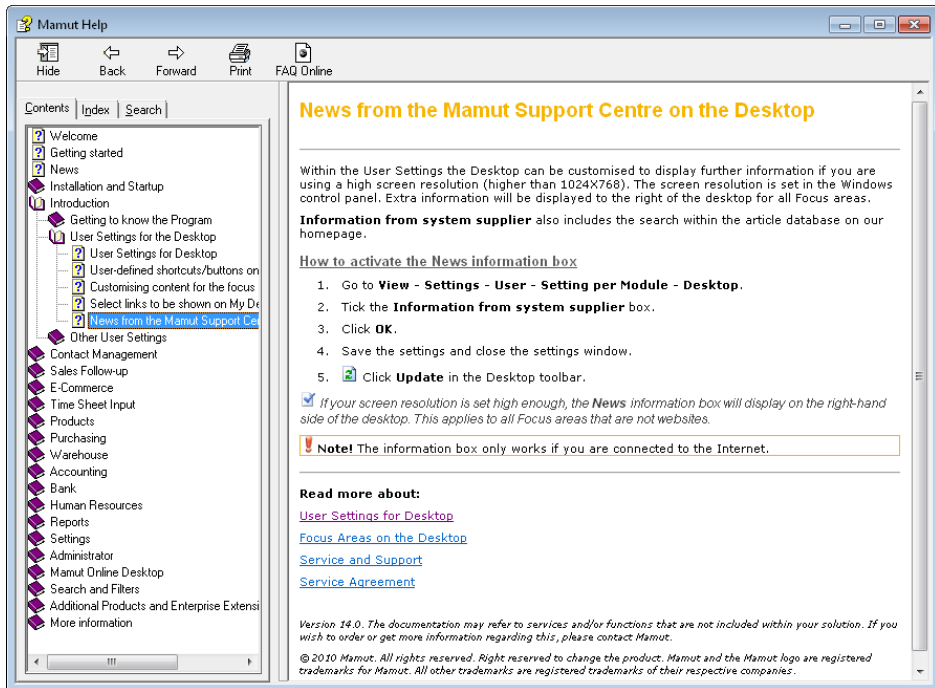
Screens in the program

When you open a module, a new screen for the module will also open. The windows in the program are built with the same template for all modules, making it easier for you as a user, to become familiar with the various functions available. There is no need to get your bearings from scratch every time you enter a new window.

A tab is a part of a window. Windows often consist of more information than is possible to present clearly in a single window. Therefore they are often divided with the help of tabs. A tab will always have a name, e.g. the **Freight** tab within the Sales/Invoicing module. In this tab you are able to view and add information in regards to the freight and delivery of an order.

Help in Mamut Business Software

Within Mamut Business Software there is an integrated Help function that is context sensitive. This means that you are provided with help from where you need it, when you need it. You can activate Help by pressing the F1 button on the keyboard. In many places you will also find a separate button for Help. Both of these alternatives open help for the window or module you are working in.



You can find information by browsing through the Contents and identifying help by category, searching within the Index or using Search to identify the information using associated words.



Tip! Help is also available Online. The online version contains the latest version of Help, including screen shots with examples, links to additional articles and more content. You will find the settings for help via the menu **View - Settings - User** and the tab **Other**.

Under **Contents** you can double-click on the category you need help with and in this manner browse through to the information you need.

Under **Index** you can search for a help topic by pre-defined search words.

Under **Search** you can search for a word contained in the help text. Searching in this manner, will bring up hits for all occurrences of that word throughout the help files.

If you experience problems in connection with your Mamut program, you can access many useful user tips on our support pages: www.mamut.co.uk/support.

You will also find many specific tips and tricks in the Article search database that you can find at www.mamut.co.uk/support/search.

On the support page you are also able to read the 10 most read and 10 newest support articles.

The Desktop

By 'Desktop' we are referring to the background when inside the actual Mamut program. This is always on view behind the various module windows that you open. Therefore the desktop is not the same as the Windows® desktop, where you can find shortcuts to programs, files and other items on your computer.

The desktop gives you an overview of the information flow between the various components of the system. It also gives you direct access to the status information for every focus area - you define yourself which one. This gives you a quick overview as well as increased control of your business operations. In addition, the desktop acts as a browser, giving you access to current tips, offers, and other user information to help with your daily work.



Note! When you have made changes and saved the settings for the desktop, you can click on the **Update (F5)** in the toolbar menu on the desktop to view the changes.

Easy and flexible customisation

The desktop can be customised so that each focus area contains the information and links to match your personal use. Most of the desktop can be modified in the User Settings. You can also right-click on buttons and information boxes in order to replace them with another one. The content of the desktop is set up to fit your product, along with your access rights and eventually user settings where you can choose which functions will be displayed. Within the user settings, the desktop provides the possibility for further information to be displayed, if you use the high screen resolution (higher than 1024X768). See the section on 'Customising the desktop' below links for more information on how to customise the desktop for your use.

The toolbar

You can create new entries into all of the most common registers directly from the **New** button on the desktop. There is a shortcut key for opening lists, and in addition the toolbar gives you access to calendar functions, reports, the settings window, and many other functions. This means that the toolbar offers you quick and easy access, to the most commonly used functions, at all times.

The left-hand side menu/Focus areas

The focus areas on the left-hand side of the desktop, give you quick access to a number of functions that naturally connect to one another. For example, if you click on **Contact service** in the left-hand menu, the bigger window to the right will show buttons for the various functions in that module. These buttons are arranged in such a way, as to portray a picture of the process-flow within the module. Clicking on the buttons will open the related window.

Flow charts/Shortcuts

The buttons for each focus area are organised in relation to one another in order to illustrate the process flow within the module. The buttons function as a short cut which can be used to open the related module.

Information routes

The desktop also shows a number of information routes, containing key information that has been extracted from your data. By default, there are a number of different information routes that will vary according to the active focus area. You can remove information routes from the display, or choose to show a different information route instead.

Update information



The information boxes are not updated automatically while the program is in use. You are able to update the information displayed on the desktop, by clicking on the **Update** button in the toolbar. In addition to this, the User Settings allow you to select whether information should be updated at program startup or once a day.

Your personal shortcuts/buttons

Below the information boxes, you will see a display of buttons. These act as shortcuts to various registers or functions that are relevant for the active focus area. Here too, you can adjust which buttons you want to have displayed. For example, you can right-click on a button in order to replace it with a different one, or adjust several buttons at once within the User Settings. Additionally, the **My functions** button allows you to put together your personal set of shortcuts to various functions within different modules, which will be displayed regardless of which focus area is active.










Web pages with continuously updated content

In the program, you will find the **Mamut Information Desk** - an optional news channels that is updated daily via the Internet with information, news, user tips related to your program and area of work and much more. The Mamut Information Desk is displayed as a focus area in the left-hand menu. Via the **Mamut Support Centre** you have the opportunity to contact our user support department by typing in a query and sending it to the support centre. You can also search for answers to your questions yourself within our article database.

The Desktop Toolbar

You can create new entries into all of the most common registers directly from the desktop, via the **New** button. There is also a shortcut key for opening lists, and furthermore, the toolbar gives you access to both the calendar functions and the settings window. Therefore, the toolbar offers you quick and easy access to the most commonly used functions at all times.

The desktop has a fixed toolbar. However, the various module windows within the program, have toolbars adjusted to match the functions available within that window.

Icon	Function	Description
	New	Sets up an empty register card for creating a new register unit.
	List	Displays a sortable/searchable list of all created units in a register. The arrow on the right gives access to the ten last edited units.
	Reports	Shortcut to the report module.
	Calendar	Shortcut to the calendar.
	Common calendar	Shortcut to the common calendar.
	Update	Updates the information boxes on the desktop. You can decide whether these should be updated continuously or only when you click on Update in the desktop user settings.
	Settings	Shortcut to the settings.
	Minimise	Minimises (whites out) the content of the information boxes on the desktop. To re-instate the content, click on Update or change the focus area and then go back.
	Help	Opens the help files. Remember that you can also press [F1] to get specific help for every window.

Focus areas on the Desktop

The focus areas on the left hand side of the desktop, provide quick access to those functions that have a natural connection with one another. For example, when you select **Contact Management** in the left hand menu, the window to the right will display buttons for the various functions within the module. These are organised in such a way as to visualise the process flow within the module. Clicking on a button will open the relevant module window.



Within the user settings you can select which of the focus areas should be active when you log in. This allows you to, directly access the functions most frequently used. If you have set your monitor to a high screen resolution, you will be able to see fixed information to the right of the desktop for all focus areas that are not websites. Read more about this in the section 'Desktop user settings'.

The buttons showing the process flow in the main window, act as shortcuts to the various functions. Which buttons are displayed, depends on your licence and the functions you have access to.

Below this flow diagram you will find information boxes, buttons/shortcuts to other functions and a user-defined 'My functions' button containing further shortcuts. You can decide which information boxes and buttons each focus area should display within this part of the window.



If you wish you can select to **Show buttons for the module instead of focus area in the left hand menu**, within the user settings for the desktop. If you tick this box, the desktop will display module buttons which take you directly to a module. This is opposed to the focus area buttons, which take you to a selection of functions. This will make the left hand menu act as a shortcut directly into a single module.

Websites on the Desktop

You can find some of these focus areas on the left-hand side menu on the desktop. Which buttons you are able to see depends on your product and which functions you have access to.



Note! Websites require you to be connected to the Internet.

Offers from Mamut



This button leads you to a page where you can find current offers from Mamut and our co-partners.

Startup



Mamut Startup is a complete entrepreneurial program that assists you with planning and starting up your own business. The program provides you with information and advice on how to get started with your own business, and in a separate module, offers step-by-step help for writing a professional business plan. You also have the opportunity to create your own website including a webshop. Additionally, the program helps you keep an overview of all your contacts, activities and documents.

Mamut has set up a separate Startup portal which can be accessed directly from within the program. The Startup portal is an information service, offering you information and advice that may be useful during and after the establishment of your business.

If you are already a Mamut customer you can order the Mamut Startup guide, a free add-on product that will give you access to the Business Planner and Startup Portal directly from within your Mamut program.

Mamut Online Desktop



Mamut Online Desktop provides you with web based access to information and functionality from Mamut Business Software along with services included in Mamut One.

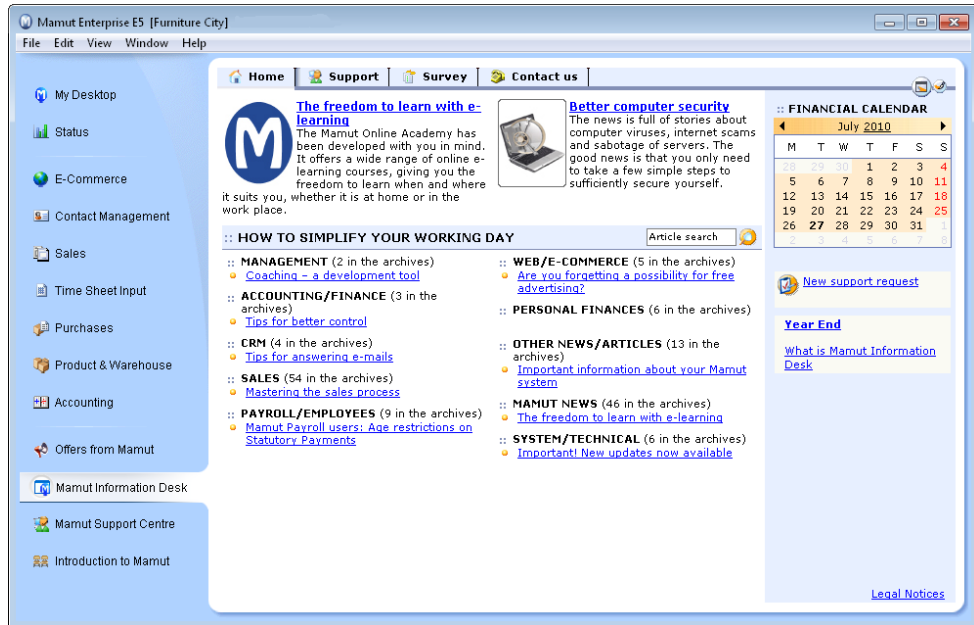


Note! In order to gain access to Mamut Online Desktop, you must have a valid agreement for Mamut One. The services that you have access to within Mamut Online Desktop are dependent on your Mamut One Service Agreement.

Mamut Information Desk



You can find the **Mamut Information Desk** in the program. This is an optional news channel that is updated daily via the Internet, with information, news, user tips related to your program and area of work, and much more. The Mamut Information Desk is displayed as a focus area in the left-hand menu.



The Website statistics gives you information, which can be a helpful guide in devising a website strategy and deciding on the look for your site. The traffic summary provides a quick overview over the number of visitors for a certain period, total statistics as well as visitor records. A more detailed statistic can be exported to Microsoft Excel and contains a detailed summary of visiting numbers for every day. You also get separate statistics for your website and the webshop.

Mamut Support Centre



The **Mamut Support Centre** allows you to contact our user support department, through typing in your query and then transferring it to the support centre. You are also able to search for an answer to your questions by using our article database.

When you create a case for the Mamut Support Centre, you are able to follow its status and progress. Via an icon on the desktop toolbar, you will also quickly see if any information has been added to your case.



If you are using a screen resolution that is set to 1024x768 or higher, you can select to show support news on your desktop as an option in the user settings.

Introduction to Mamut



Clicking on this button will lead you to a short introduction to Mamut. This also contains information on the options found within the program, a product overview, how to evaluate the program yourself, as well as contact and order information. Until a licence agreement has been signed with Mamut, this page will show as default when you start up the program.

Information Boxes on the Desktop

The desktop shows a number of information boxes, containing key information extracted from your data. By default, there are numerous information boxes that vary depending on the active focus area.

You can exclude information boxes from being displayed, or can select to show a different information box instead. For example, if you would like to replace the **My Activities** information box under the **Contact Management** focus area, with another box, you can click on the downwards arrow in the top-right of the relevant information box, and select **Change information box**. Select the information box you would like to display in place of the current one, from the list that appears.

If you would like to edit the information box in more detail, right-click into it and select **Adjust**. In the window that appears, select which information boxes you wish to display from the list. Please be aware that different focus areas have different amounts of space available. The **Contact Management** focus area, for example, offers room for 2 information boxes. Any changes you make will apply to your own user profile only. Other users can choose their own settings.

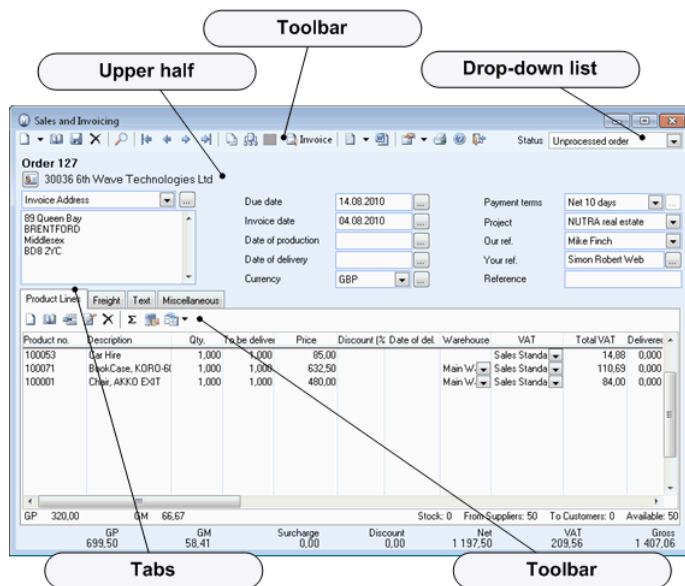


The user settings allow you to decide whether the information boxes should be updated when starting up (the window) or when the user clicks on **Update**. The latter option may be especially useful for multi-user environments where the network has a lower capacity. Read more about this in the section 'Desktop user settings'.

The information boxes are limited to 200 items.

Screens in the Program

When opening a module, a new screen for this module will also open. The windows in the program are built on the same template for all modules. This makes it easier for you as a user to become familiar with the different functions available without needing to establish your bearings from scratch every time you enter a new window.



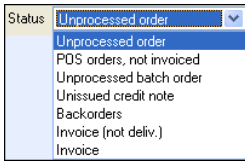
The toolbar

At the top of the screen you will find the toolbar. Generally, this contains buttons for creating new items, deleting items, duplication etc., buttons for going back and forward within the register, as well as buttons for functions that go hand in hand with the processing of items. If this involves a process over several steps, the buttons are usually placed from left to right and activated according to how far you are within the process. An example of this is the Purchase screen, where the 'Update ledger' function will not be available until you have registered the receipt of the goods. You can read more below about the tools in the screen shots.



Drop-down lists

You will often find drop-down lists to the left of the toolbar. These act as filters and will limit items to those that fulfil the chosen drop-down list criteria, when moving back and forth between the items. For example, when selecting **Unprocessed order** from the drop-down list in the Sales and Invoicing window, only entry items that fulfil this criteria will be displayed when you move through the window via the 'Previous' and 'Next' arrows. Read more about the Status drop-down list below.



The top half

The top half of the screen contains the screens fixed content. These are the fields, which will be available regardless of how you move between the screens for the tabs below.

Tabs

A **tab** is a part of a window. Windows often consist of more information than is possible to present clearly in a single window. Thus they are often being divided with the help of tabs. A tab will always have a name, e.g. the **Freight** tab within the Sales/Invoicing module. In this tab you can view and add information to do with the freight and delivery of an order.

Tabs contain special functionality that may be relevant to the current item. The first tab is usually the one that is used the most. In the Sales and Invoicing window for example, this would be the Product Lines tab, where you enter the products you are going to sell. A tab may also contain its own separate toolbar line.

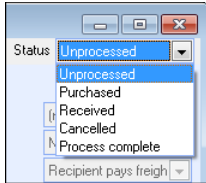
List windows



You may also often prefer to open a module as a list instead of it opening on a specific item page. You can define this in the **User Settings** where they are available. See the user settings for Sales and Invoicing, for example.

The Status Drop-Down List

The **Status** drop-down list can be found in the upper right hand corner in a number of modules. The list contains all statuses available in the module in question. The list can thus be used as a filter that lets you define what is displayed in the window.



An item, such as a sales order, a quotation or a time sheet, goes through different stages and this progression depends on where in the overall process the item is located. These stages are called **Statuses**. Each status represents one stage in the overall process so that you always know how the item should be handled. In some modules, you can change the status of an item by processing it via the buttons on the toolbar, while other modules require that you change the status manually by editing the item and selecting a different status from the drop-down list.

The **Status** drop-down list in the upper right hand corner of the window indicates the current status of the item. A sales order, for instance, is automatically assigned to the status **Unprocessed order** when it is created and then transferred to the status **Invoice** when you invoice the order. By default, the filter follows the status of the item which you are currently with.



Tip! In the modules **Sales/Invoicing** and **Time Sheet Input** you can define whether or not you want the filter to follow the status change of the item or if the filter will remain in the original status when you have processed the item.




When you open the registration window in most modules, the last changed item will be displayed. You can use the arrows to browse to other items with the same status. If you want to locate an item with a different status, simply select the desired status from the drop-down list and browse for the item.





In the user settings in some modules you can choose to open a window listing all items when opening the module. By using the Status list in these list windows, you can filter the result to only display items with a certain status.


List Windows


 In many modules in the program, you will find the **List** button in the toolbar at the top. Clicking on the button will open a list window with information about the module you are working in. Examples of modules where you can find the list button are: Contact, Product, Employee register, Project, Time Sheet Input, Quotation, Sales and Invoicing and Purchase.


In several of the lists there are a number of default buttons that have a similar function, independent of which module you are in. Not all buttons are available in all lists, and not all buttons will be activated and available even if they are displayed in the list window.

 **New** allows you to create new entries.


 **Edit** allows you to edit the item you have selected.

 **Delete** allows you to delete the entry.

 By using **Selection Off/On** you can turn off and on the selection you specified in filter settings. Read more about Filter.

 Through **Filter settings** you can apply settings for one or more properties that the entries will have to be included in the selection.

 **Print** provides you with the opportunity to print the contents in the list window.

 Click on the **Help** button if you are stuck in the program and need help to proceed.

 Click **Close** to close the list window.

Sorting

By clicking on the column headings you can sort the contents in the list window per Name, Number, ID, Description, Telephone number etc. The column headings in the list are displayed in **bold**. In several modules you can decide how the lists are sorted as a default when opening the list window. You do this through User settings.

Search

At the bottom of the list window you can search by entering search words or numbers. The search will be carried out based on the sorting criteria you apply. This means that if you sort by name and start entering the letter S.... the list will display all contacts that start with S, and as you enter the rest of the word e.g. 'Smith', the search will stop on the first contact that starts with 'Smith'.

Status

In several of the list windows you will find one or more drop-down lists where you can make a selection and set the status. This can be helpful in the product list if you for example have several hundred products. In the first drop-down list you can select product group and in the other for example 'Stock item'. This will reduce the contents of the list, improve the overview and will make it easier for you to locate the product you are looking for.

Important Tools

In most of the modules within Mamut Business Software, you will find the same functions within the toolbar for editing and navigating. Here is an overview of the most important functions.

Icon	Function	Comment
	New	Opens a new, empty registration card where you can create a new item in the register.
	List	Shows a sorted, searchable list of all created items in the register. The arrow to the right gives access to the last ten edited items.
	Save	Saves changes made in the register. If you work with several windows at the same time, it is important to save your work when moving between windows.
	Undo	Reverses all changes you have made in the card since it was last saved.
	Delete	Deletes the item that is open in the register. Notice that you cannot delete items that are referred to in other modules.
	Search	Searches for items in the register with a selection of search criteria.
	Filter off/on	Activates/de-activates the filter set in Filter Settings.
	Filter settings	Sets the filter by the items properties. When the filter is activated, only those items with the selected properties will be available in the register.
	First	Moves to the first item in the register.
	Previous	Moves to the previous item in the register.
	Next	Moves to the next item in the register.
	Last	Moves to the last item in the register.
	Print	Prints various simple reports in the register.
	Settings	In most modules, you can set up the format and functionality according to your preferences.
	Sort	Sorts the register by number or name that you select by using the arrow to the right.
	Help	Opens the help file. Note that you can press [F1] to get help in each individual window.
	Quit	Quits the module and saves entries.

The Desktop has its own fixed toolbar.

Shortcuts in the Program

The most commonly used functions in the program have been assigned their own shortcut keys. This enables experienced users to navigate through the program in the fastest and easiest way possible.

The program supports the default specifications for Microsoft Windows. This means that you may use the [TAB] key to move to the next field in a screen or [SHIFT]+[TAB] to move back to the previous field in a screen. Furthermore, you may press the [ENTER] key to complete a registration. It is also possible to use the [ENTER] key on the numerical keyboard for this purpose, which you may find useful when entering financial, number based data. This allows you to enter information quickly and efficiently from the keyboard and many professional computer users prefer working this way.

List windows

In windows showing a list of items, you can use the arrow keys to move the focus up or down in the list. Here too, [ENTER] may be used for selection purposes.

Drop-down lists

With drop-down lists, you can use the [SPACE] key to open the list in order to display the various options. Enter the first letters of the entry you are looking for, so the focus will jump to the appropriate place, and then use the arrow keys to navigate up and down the list. If there are several options starting with the same letter, the focus will move along the entries by repeatedly pressing the key for the letter. You may also enter the entire name you are looking for. This will take you directly to the entry you are looking for rather than to the options with the first letter matching. Press the [TAB] key to move on to the next field.

The Main Menu

In the main menu/menu bar at the top of the screen you can activate keyboard shortcuts by pressing [ALT]. You will see an underscore below one letter for each of the menu bar options. This letter is the shortcut key for activating the related menu.

Journal Entry

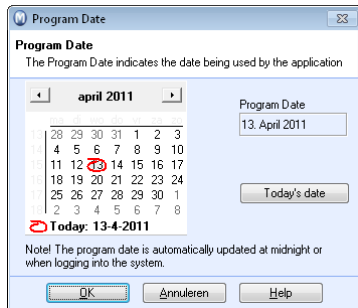
Journal Entry has its own shortcut keys. It is possible to use some of these shortcuts in other windows.

General shortcuts

Function	Keys	Description
File	Alt + F	Opens the File menu
Edit	Alt + E	Opens the Edit menu
View	Alt + V	Opens the View menu
Help	Alt + H	Opens the Help menu
New	Ctrl + N	New item
Open	Ctrl + O	Opens a file/document
Edit	Ctrl + E	Edits a file/document
Complete	Ctrl + U	Sets an activity as Complete
Save	Ctrl + S	Saves an item
Delete	Ctrl + D	Deletes an item
Print	Ctrl + P	Prints the item
Undo	Ctrl + Z	Undoes the last action
Cut	Ctrl + X	Cuts a highlighted selection
Copy	Ctrl + C	Copies a highlighted selection
Paste	Ctrl + V	Pastes a previously cut or copied selection
List	Ctrl + L	Shows a list of items
Search	Ctrl + F	Initiates the Search window, where you enter you search criteria
Quit	Ctrl + Q	Closes the active window
First in list	Ctrl + Home	Moves to the first item in a list
Previous	Ctrl + Page Down	Moves to the previous item in a list
Next	Ctrl + Page Up	Moves to the next item in a list
End of list	Ctrl + End	Moves to the end of a list
Insert	Ctrl + Insert	Inserts an object
Open drop-down list	Space	Reveals the option in a drop-down list
Help	F1	Opens the help files

Program Date

The **Program date** is automatically set at each startup and at midnight, and can be retrieved from the machine date on your computer.



Note! The machine date on your computer is not the same as the Program date in the program, even if it is identical.

You can change the **program date** manually within the program. This will not have a consequence for the machine date on your computer.

How to change the program date within Mamut Business Software:

1. Select **File** and **Program Date** from the main menu.
A calendar screen will open.
2. When you change the date, select month first and then the year from the drop-down list.
Tip! You can select the month using the arrows, or by clicking on the month to enable the pop-up menu. To change the year, click year first, and then use the up and down arrows.
3. Mark the date (new date) by using the mouse.
4. Click **OK**.



You have now changed the Program date. The program date on your computer does not influence the program date on other computers for multiple user installations.



Note! The program date is automatically updated to the machine date on your computer at midnight (if you don't log out of the program) or when logging into the program. If you are logged in at midnight, the new program date will be shown in the title bar (next to the name of your company database), until you log out or open a different company database.

The **week number** is retrieved from settings on your computer in the same way. In Windows the week number is set according to the Control panels **Regional and language settings** on your computer. Some regions use irregular week numbers. This means that you should check the setting and machine date in Windows, as well as the program date in Mamut Business Software if the week numbers within the program are incorrect.

Getting Started with the Number Series

Several of the most important modules in the program are larger registers containing a large number of registrations. Each entry is thus registered with its own unique number, acting as an important reference.

Before you start using the program you can adjust the number series for every register. This might be useful if you have used a different system previously and would like to continue with the same number series as before. You can add a **First no.** up to the point when you enter the first data into the register. You can then only make changes to the **Last used** number. If you add the last used number, the next number in the number series will be used for the next registration.

Once a number series is in use, only the last used number may be changed.

First-time Startup of the program

During the first time startup you are given the opportunity to make changes to the different number series. Both the first and last used number may be overwritten at this stage.

How to change a number series

Go to **View - Settings - Company**. In the **Company Settings** tab you will find the **Number Series** button. Clicking on it opens the **Company Settings for Number Series** window, where you can change the first number for contacts or suppliers, for example, by clicking inside the **First no.** column and entering your preferred start number. This number may only be changed to a higher value. Fields that may no longer be changed are marked in red.

Overriding product numbers

When you create a new product or duplicate a product you can overwrite the automatically assigned product number. The **Last used** field in the **Company Settings for Number Series** will then be updated accordingly.



Note! If you create a 'hole' in the number series in this way, you can fill it by overwriting product numbers later. However, the **Last used** field in the number series will nonetheless remember the highest number that has been used, as you cannot reset the last used number to a lower value.

Invoice and Credit Note numbers

These two number series should not overlap. By default, invoice number start from 1 and credit note numbers start from 90,000. If you would like to changes this you should ensure to leave a suitable 'gap' between the two number series so that they will never overlap.

Number series for journal entries in the Accounting module

These are controlled by a separate setting in the Accounting Settings. You can find out more about Journal numbering in the introduction manual "Financials, Logistics and Human Resources".

Number series at the start of a new year

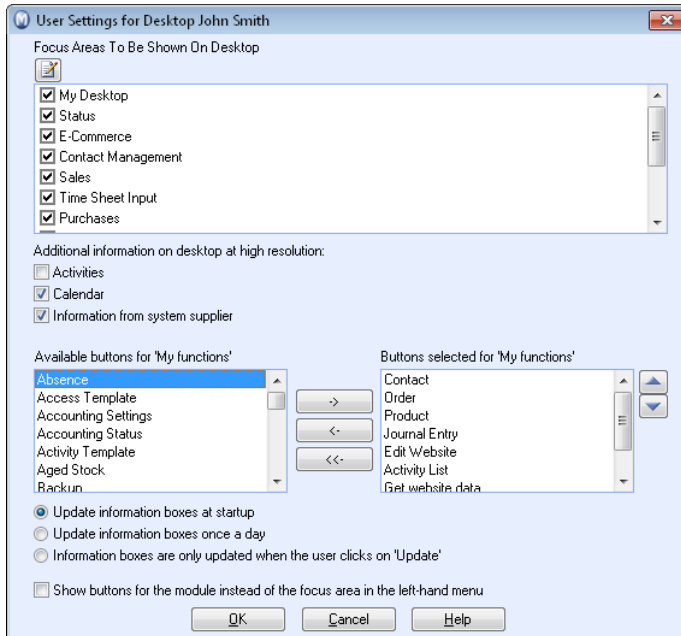
By default, each journal type is given its own number series. Each number series starts afresh at No.1 every new year unless you override this manually before you start posting journal entries. Other number series, e.g. Order number, Invoice number and Customer number will continue where they ended the previous year.


Note for starting a new accounting year: It is important to bear in mind that the invoice number series, for example, cannot be reset to 1 at the start of a new accounting year. Your books should never contain two invoices with the same invoice number. Thus the invoice number series is continuous year on year.

User Settings for the Desktop

The desktop can be adjusted so that you can find the information and shortcuts that match your program usage for every single focus area.

You can access the user settings for the Desktop by clicking **View - Settings - User - Settings per Module - Desktop**.



 You can also get to the settings by clicking the **Settings** button directly from the toolbar on the desktop. For the information boxes and buttons, you are also able to right-click in to customise a button or to change the user settings for the current focus area.

Select which focus areas to display

Here you select the focus areas you want to have displayed on the desktop. You can only choose focus areas you have access to and that are included in your licence.

Additional information on desktop at high resolution: Within the user settings, the desktop offers options for further information if using a high screen resolution (1024x768 and higher). The screen resolution is set within the Windows Control Panel. The selection you make here in the user settings will show on the right of the desktop for all focus areas. **Information from system supplier** also includes the search in the article database on our home pages.

Select shortcuts to be displayed under the My function button

The content of the desktop depends on your licence, and access rights, as well as any user settings you may have created, such as selecting not to display certain functions.

Select when to update your desktop's information boxes

The information boxes contain information extracted from the company database, and can be compared to taking out a report. So that this does not take up too much capacity, especially in regard to multi-user environments, you can select when information boxes should be updated. By default, the boxes are updated upon starting up the program. Many might prefer to steer the updates themselves and thus you can select to update the boxes only when you click on the **Update** button in the desktop toolbar. But please remember that the information will not be updated unless you click on that button, including when you start up the program.

The information boxes are limited to 200 items.

Match the focus areas for your use - information boxes and buttons

You are able to select which information boxes to show and which buttons/shortcuts should be displayed at the bottom of the screen for each focus area. The different focus areas offer room for various numbers of information boxes and buttons. The maximum number available is shown in the window.

Read more about how to customise the focus areas below.

Would you prefer to show shortcuts directly in the left-hand menu?

Show buttons for the module instead of the focus area in the left-hand menu: If you tick the box here, the desktop will show buttons for modules, instead of the focus areas which offer a shortcut to a selection of functions. The left-hand menu will then act as a direct shortcut to the separate modules. You are still able to select which buttons should be shown in the left-hand menu. These are the buttons you selected under My functions (see above).

User-defined Shortcuts/Buttons on the Desktop

Buttons/shortcuts

Below the information boxes on the desktop you will see a number of buttons. These act as shortcuts to various registers or functions that are relevant to the active focus area. In the same way as is possible for the information boxes on the desktop, here too, you are able to customise which buttons you would like to show. Right-click on a button to replace it with another one.


Each focus area has room for a fixed number of buttons at the bottom of the window.

My functions

Alongside the shortcut buttons you will also find a button called **My functions**. This acts as a list of further shortcuts to other functions. The content of this list is extracted from the user settings and is the same regardless of the active focus area.

Customising Content for the Focus Areas on the Desktop

How to customise the focus area content

1. Got to **View - Settings - User - Settings per Module - Desktop**.
2. Select the focus areas you want to edit in the list in the top part of the window.
3.  Click on **Edit**.
4. Select the information boxes that should be available in the top half of the window.
5. Select the buttons that should be available from the bottom half of the window.



The buttons at the bottom of the desktop will change according to your selection as will the information boxes.

When you have made changes and saved the settings for the desktop, you can click on the **Update (F5)** in the toolbar menu on the desktop to view the changes.


The number of information boxes that can be selected varies for the different focus areas.

Selecting Links to be shown on My Desktop

You can create your own links on the desktop, which might be links to your own web pages or to other web pages you visit regularly. These pages will open in your default web browser. The links are displayed under the **My links** information box, which you can find among the information boxes you select for display within the various focus areas.

The **My links** information box has room for up to 6 links. By default, **My links** is shown under the **E-Commerce** focus area, for those customers with a licence for, and access to this module.

How to add a link to the information box My links

1. Select a focus area showing the **My links** information box. Read more about how you can customise the desktop in the section 'Customising content for a focus area on the desktop'.
2.  Click on the arrow to the right of the heading and select **Enter the links to be displayed on My Desktop** from the drop-down list.
3. Enter or paste the link into one of the fields.
4. Click **OK**.




The link will now show in the My Links information box.


News from the Mamut Support Centre on the Desktop

Within the User Settings the Desktop can be customised to display further information if you are using a high screen resolution (higher than 1024X768). The screen resolution is set in the Windows control panel. Extra information will be displayed to the right of the desktop for all Focus areas.

Information from system supplier also includes the search within the article database on our homepage.

How to activate the News information box

1. Go to **View - Settings - User - Setting per Module - Desktop**.
2. Tick the **Information from system supplier** box.
3. Click **OK**.
4. Save the settings and close the settings window.
5.  Click **Update** in the Desktop toolbar.

 *If your screen resolution is set high enough, the News information box will display on the right-hand side of the desktop. This applies to all Focus areas that are not websites.*



Note! The information box only works if you are connected to the Internet.

Other User Settings

The user settings give each user the opportunity to customise the program according to their needs. Everyone working in the program should therefore be registered as a user. Which information the user has access to is defined by assigning access control templates. More information about User Administration and User Access Rights can be found in the chapter "Administrator". The user can open the user settings from the toolbar within the individual modules. The user settings can also be accessed via **View - Settings - User**.

User name and password

Under User administration you enter the employee's **Username** and **Password** that are used when logging in to the program. Both can be changed if your user access template allows this.




Tip! If you have forgotten your password you should contact a user with **Full access/Super user** rights in order to get a new password.

Customising modules and company databases

The user settings give you the opportunity to customise all accessible modules according to your needs. You can also define a default company database, language and which window should be opened when opening the company database.

More information about the user settings can be found in the chapter "Settings".

Setting up the system's startup window

You can set up the system so that your most commonly used window starts automatically when you log in. The setting is found within your User Profile information. You can either change your own user profile or a system administrator can change the user profile of every user. This is done via **View - Settings - Security - User administration**. Select the user you would like to edit and click **Edit** .

How to specify the window that opens automatically following login:

1. Select **View - Settings - User** and the **Setup** tab.
2. Specify the window using the **Window when opening company database** drop-down box.



The window will open automatically when you next log in.



Tip! You can select to **Automatically open the Contact List when opening the Contact card**. This is specified in the User settings for the Contact module. A similar choice also exists for contact persons. Both of the settings work together with the automatic opening of the Contact Register/Contact Person window following login.

Chapter 2:

Search and Filter

In this chapter:

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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 on sales@mamut.co.uk or by phone on 0207 153 0900.

Search

If you want to get hold of a particular unit in a module, which you cannot find using the list, it may be worth running a search using simple criteria. When searching in the Contact module, you can also search for information about contact persons if you do not know the company against which the person in question is registered.

Searching for information

1. Click **Search** in the module in which you are going to use the function.

2. Select **Search for**, if it is available (applies to the Contact register, where you can select between Contact, Contact person and both simultaneously).
3. Define the criteria you are searching for. The fields work in the same way as for filter. If the criterion you are searching for is not available you can click **More criteria** for access to all searchable fields.
4. Click **Search**. A list of all contacts that fulfil the criteria you defined will be shown.
5. Select one of the contacts and click on **Go to...**




The Contact is now retrieved from the contact register. If there are several hits for your search, you can browse forward and backward using the Next and Previous buttons.



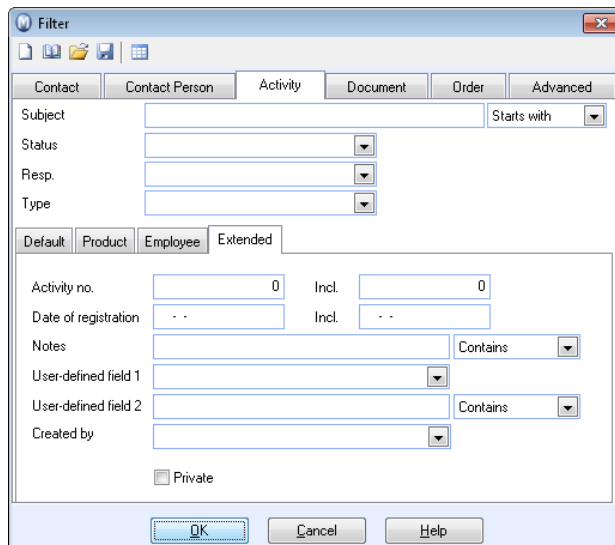
Remember that you can sort the search window by clicking on the heading of the column you want to sort by.

Selection

Filters


 In all modules you can simplify the registration- and retrieving processes by setting a specific filter. You then set up one or more properties that the units to be included in the selection are to have.

To be able to make use of the **Filter** functionality you have to set criteria in one or more of the fields so that the information you are looking for can be filtered out. The tool searches across modules and could practically find any information you require if you set the right search criteria.




Many of the windows contain drop-down lists that sort items, e.g. based on status. Such filters are described in separate, relevant chapters. In your daily work it can be important to find the right contact as quickly as possible.

You can access the filter in different ways:

 Click the **Filter Settings** button in the toolbar at the top of the module or in the list you are working with.

 Click **Print** in the **Reports** module. This activates the Filter window.

 Click the printer icon in the module you are working in.

Go to the **File** menu and select **Print**.

Click **More criteria** when undertaking a **Search**.


Go to the **View** menu and select the **Contact Filter Wizard**.

The appearance of the window will depend on the module for which you are creating the filter. A common feature is that you can choose between most fields in the module, along with fields from other integrated modules. You can, for example, use three criteria to find all the contacts(1) to whom you sold a specific product(2) in the last month(3).

The **Contact filter wizard** allows you to set up fixed queries that you often run. Each time you run the filter, you can also choose from several actions for which you are going to use the selection.

Filter On/Off

When you set filter criteria via the Filter settings you determine that a list, for example, should only show a certain amount of available entries. Screens that allow you to set filters thus also contain a button in the toolbar allowing you to disable the filter again so that all items show.

 This button is called **Filter Off/On**.

How to make a selection filter

1. Open the Filter module as described above.
2. Enter the criteria the relevant fields have to fulfil.
3. Enter any combination (Boolean) criteria via the **Advanced** tab.
4. Click **Display Selection** to see a list of the units that fulfil the criteria you have set. If the selection is too broad/narrow you can go back to the Filter window and edit the criteria.
5. Click **Save** in the toolbar if you would like to save the filter for repeated future use.
6. Click **OK** to activate your selection.

 *The Report module will now produce a printout for the selection you made. If you made your filter in a module the Selection Off/On button will be activated and you can move back and forth within it via the arrow buttons in the toolbar.*

The Fields within Search and Filter

You can use **Search** and **Filter** to choose from as many fields as there are options for registering data in the module. Below you will find a description of the various ways in which you can set criteria.

The screenshot shows the 'Filter' dialog box with the 'Contact' tab selected. It contains several input fields and dropdown menus for filtering contacts. The 'Contact' tab includes fields for Subject, Status, Resp., and Type. The 'Contact Person' tab includes fields for Activity no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Activity' tab includes fields for Activity no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Document' tab includes fields for Document no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Order' tab includes fields for Order no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Advanced' tab includes fields for Advanced no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Default' tab includes fields for Default no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Product' tab includes fields for Product no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Employee' tab includes fields for Employee no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Extended' tab includes fields for Extended no., Date of registration, Notes, User-defined field 1, User-defined field 2, and Created by. The 'Private' checkbox is also present.

Custom fields

Custom fields are open so that you can enter the filter criterion that you want. All these fields are followed by a drop-down list containing three options:

Starts with: the selection will start with the letter(s) or word(s) you enter in the custom field.

The screenshot shows the 'Filter' dialog box with the 'Contact' tab selected. The 'Contact Name' field is entered with the letter 'M'. The dropdown menu next to it is set to 'Starts with'.

Exact: the field in the selection corresponds exactly to the letters/words you have entered in the custom field.

The screenshot shows the 'Filter' dialog box with the 'Contact' tab selected. The 'Contact Name' field is entered with the word 'Furniture'. The dropdown menu next to it is set to 'Exact'.

Contains: the field in the selection contains the letters/words you enter in the custom field, but it can also contain other letters/words.

The screenshot shows the 'Filter' dialog box with the 'Contact' tab selected. The 'Contact Name' field is entered with the word 'Furniture'. The dropdown menu next to it is set to 'Contains'.

Drop-down lists

The drop-down lists contain several options, from which you can select one.

From/to fields

In the From/To fields you can make queries from one number (in the field on the left) to another number. Everything from/to these numbers inclusively will be included in the selection. If you only want to search for one number, you enter it in both fields. If you only enter something in the left hand field, the filter will go from this number and to the end of the register.

Contact No.	<input type="text" value="3010"/>	Incl.	<input type="text" value="3030"/>
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Check boxes

By selecting check boxes you can specify the categories the selection is to be part of. You can select several check boxes at once.

<input checked="" type="checkbox"/>	Customer
<input type="checkbox"/>	Supplier
<input type="checkbox"/>	Partner
<input type="checkbox"/>	Private
<input type="checkbox"/>	Head office

Radio buttons

Radio buttons are similar to check boxes, but you can only select one option.

Search buttons




When you click the search buttons, a window opens with a complete overview of the data. From this overview you can select the object you wish to put in the current field and click OK.

Advanced Selection

In the **Advanced** tab you can combine several different criteria to set more complex, logical filters (Boolean). You are free to set up advanced criteria in combination with fields from the other tabs in the Filter window.

You can set up both linear criteria such as 'A or B', and parenthetical expressions such as 'A or (B and C)'

How to make an advanced selection

1. Open the selection module as described above and select the **Advanced** tab.
2.  Click **New** for each criterion you are going to define for the filter. This opens a wizard that will guide you through the process.
3. Click on the plus sign to the left of the module in which the variable is located.
4. Select the variable for which you are going to set a criterion.
5. Click **Next**.
6. Choose between **and/or** as the prefix to the criterion, along with the condition to be fulfilled in the **Default** tab.
7. If you wish to start a bracket before or after the criterion, you can do this in the **Extended** tab.
8. Click **OK**, and the criterion will be added to the list.



The criteria has been added to the list.

Repeat the routine for all the criteria that are to make up the requirements for the selection.

You can find an example of an advanced selection below.



In help (F1), you can find more information about the fields in the **Default** and **Extended** tabs under advanced selection.

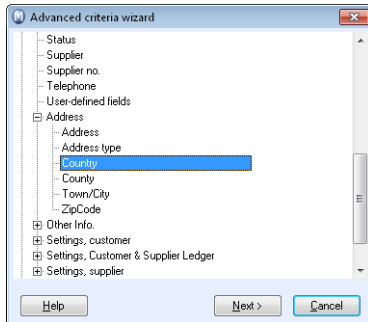
Example of an Advanced Selection

You want to view a selection of contacts based in the United Kingdom and which have the statuses **Customer** or **Near sale**.

In help (F1), you can find more information about advanced selections.

Step 1: Specify a selection of contacts based in the UK:

1.  Go to **View - Contacts - Contact Management** and click **Filter Settings** in the toolbar.
2.  Click **New** in the **Advanced** tab.
3. Click the plus sign (+) to the left of **Contact** and click the plus sign to the left of **Address** in the list that opens. Select **Country** and click **Next**.



4. Since you only want to view contacts with addresses in the UK, regardless of their sales status, select **and** as **Operator** in the **Default** tab.



In the **Conditions** drop-down list, select "equals" (=) and choose **United Kingdom** in the **Value** drop-down list.

5. Click **OK**.



The filter criteria will now be displayed in the Advanced tab.

Step 2: Specify customer status for a selection of contacts:

1. Click **New** in the **Advanced** tab.
2. Click the plus sign (+) to the left of **Contact** and **Status** from the list that opens. Click **Next**.
3. Click the **Extended** tab since you need the bracket located there. Select the **Operator** "and" since the selection will be combined with first criteria (United Kingdom).
4. Select the bracket (from the drop-down list **Opening bracket**. This step is required since this criteria will be grouped with another, for instance: contact can have the status (**Customer** or **Near sale**).
5. In the **Conditions** drop-down list, select "equals" (=) and choose **Customer** in the **Value** drop-down list.

The screenshot shows the 'Advanced criteria wizard' dialog box with the 'Extended' tab selected. The 'Operator' is set to 'and'. The 'Opening bracket' is set to '('. The 'Field' is 'Contact.Status'. The 'Conditions' is '='. The 'Value' is 'Customer'. The 'Closing bracket' is '(none)'. Buttons for 'Help', 'OK', and 'Cancel' are at the bottom.

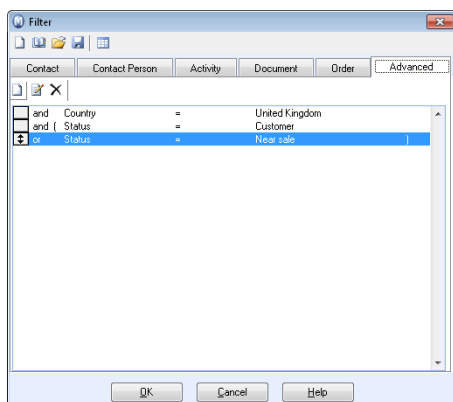
6. Select **(None)** from the drop-down list **Closing brackets** since the selection criteria is not yet complete.
7. Click **OK**.



The filter criteria will now be displayed in the Advanced tab along with the previous criteria.


Step 3: Specify a selection of contacts based on the status "Near Sale":


1. Click **New** in the **Advanced** tab.
2. Click the plus sign (+) to the left of **Contact** and **Status** from the list that opens. Click **Next**.
3. Click the **Extended** and select the **Operator "or"** since the criteria should exclude the previous criteria (contacts with a customer status).
4. Select **(None)** from the drop-down list **Opening brackets** since this criteria is a part of the previous.
5. In the **Conditions** drop-down list, select "equals" (=) and choose **Near sale** in the **Value** drop-down list.
6. Select the bracket **)** from the drop-down list **Closing bracket** to complete the criteria for customers near sale.
7. Click **OK** in order to transfer your filter criteria in the **Advanced** tab, where the two previous criteria are saved:



Tip! You can save the filter for later use. Click **Save** in the toolbar before the next step and enter a filter name and description.

8. Click **OK**.

 *The contact register will now only contain contacts with UK-based addresses and with customer statuses defined as customer or near sale. The selection is made via the following expression: United Kingdom + (Customer or Near sale).*

 **Note!** In this example, the **Status** field was used twice to define two different statuses. This selection can only be defined using the **Advanced** tab. If you use the **Status** field in the **Contact** tab, you will only be able to define 1 status.

Contact Filter Wizard

Through the wizard for contact selection, you are able to set up and store fixed contact selections that you can run regularly. These can be re-used at a later time to perform different tasks, for instance to create activities or documents related to contacts or send e-mail. The contact wizard can thereby save you a lot of time and effort.

If your contacts are organised by, for example, Group or Category, the wizard can be used as a powerful contact management tool. Read more about organising and managing contacts in the chapter "Contact Management" in the introduction manual "Complete CRM, Sales Management and Web Solutions".

You can select between **dynamic** or **static** filter. The dynamic filter is further specified in a window, and is most suitable in cases where you can easily specify the selection criteria, such as a selection of a specific group of contacts. The static filter can be much more precise by manually adding or removing contacts/contact persons.

The wizard can be launched from **View - Contact Filter Wizard**.



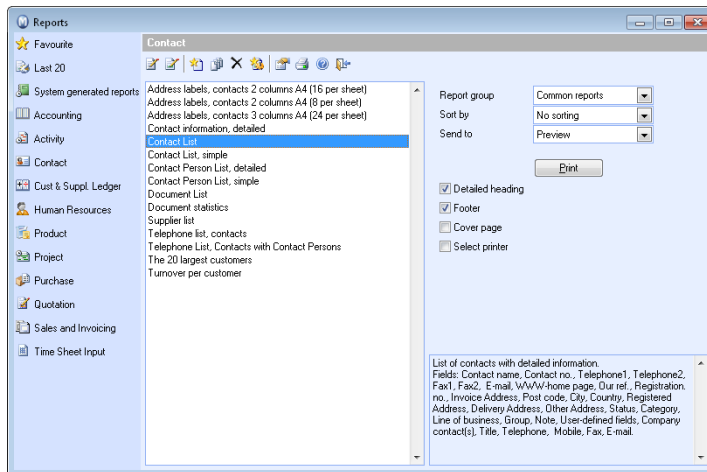
Tip! In help (F1), you can find more information about the contact filter wizard.

Period Filter - Print Contact List

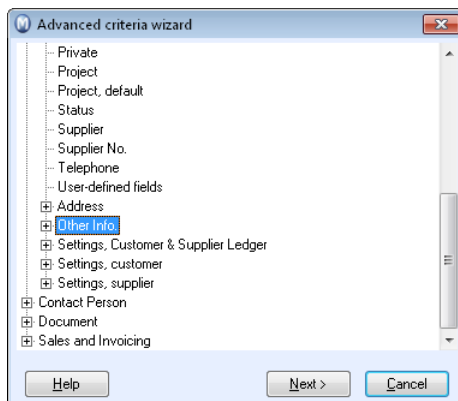
In Mamut Business Software, you can print lists displaying contacts created within a given period of time.

How to print a list of contacts created within a given period

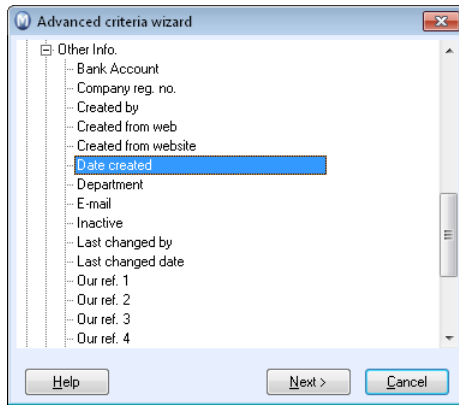
1. Click **File - Print**.
2. Choose the **Contact** category on the left of the window.
3. Double click **Contact List** in the report overview.



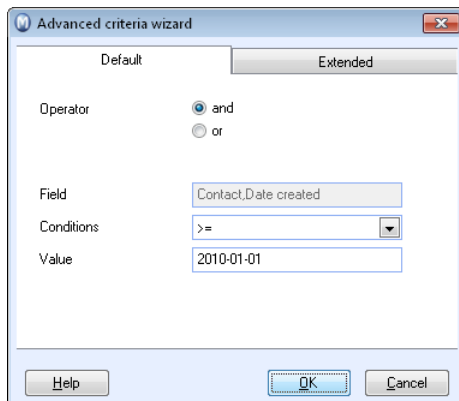
4. Click the **Advanced** tab and then the **New** icon.
5. Click the plus sign (+) next to **Contact**.
6. Scroll down and click the plus sign next to **Other Info**.



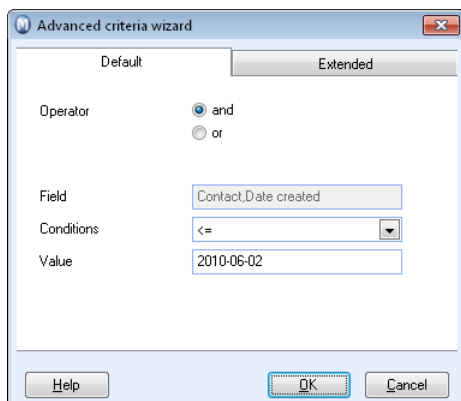
7. Select the option **Date created** and click **Next**.



8. In the **Default** tab, select **and** as **Operator**. Select **>=** from the drop down list **Conditions**. Enter the start date of the selection period.



9. Click **OK**.
10. Click the **New** icon again in the **Advanced** tab.
11. Click the plus sign (+) next to **Contact**.
12. Scroll down and click the plus sign next to **Other Info**.
13. Select the option **Date created** and click **Next**.
14. In the **Default** tab, select **and** as **Operator**. Select **<=** from the drop down list **Conditions**. Enter the end date of the selection period.



The image shows a dialog box titled "Advanced criteria wizard" with a close button (X) in the top right corner. It has two tabs: "Default" (selected) and "Extended". Under the "Default" tab, there are three sections: "Operator" with radio buttons for "and" (selected) and "or"; "Field" with a text box containing "Contact, Date created"; "Conditions" with a dropdown menu showing "<="; and "Value" with a text box containing "2010-06-02". At the bottom, there are three buttons: "Help", "OK" (highlighted with a blue dashed border), and "Cancel".

15. Click **OK**. A preview of the report will be displayed.

 *You have now printed a report listing customers which have been registered in Mamut Business Software within the given period.*

Chapter 3:

Settings

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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 on sales@mamut.co.uk or by phone on 0207 153 0900.

Settings

The Settings are what allow you to customise the system to meet your personal requirements. Within Mamut Business Software all of the central settings for users, the system and company database along with accounting, security, reports and other settings are available via a single window.

You can access the main settings window via **View - Settings** from the menu.

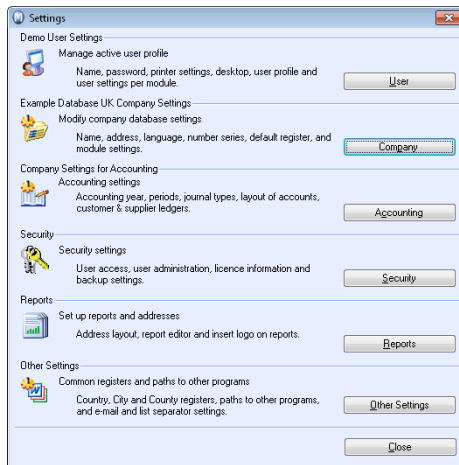
In addition, the settings window is usually accessible from all focus areas via a shortcut in the menu.



From the desktop you can click **Settings** in the toolbar, or use the shortcut [Ctrl + I].

If you have a module open, you will generally find the shortcut to the user settings and in some instances the company settings within the toolbar.

If you are a **System administrator**, all the settings will be available via shortcuts in the **Administrator** focus area.



Note!

The information below refers mainly to settings which are common to all modules. **User Settings per Module** are described in detail in the chapters concerning the individual module.

Company Settings per Module are described in detail in the chapters concerning the individual module.

Accounting Settings are described in the introduction manual "Financials, Logistics and Human Resources", in the "Accounting" chapter.

Report Settings are described in the chapter "Reports" in this introduction manual.

User

User Settings

Everyone working in the program should have their own user profile in the User settings. The User Settings need to be created by a user with system administrator or super user status, via the **View - Settings - Security - User administration**. However, later on the individual user can adjust their own settings if their access rights permit this. The access rights are determined by the original settings made by the system administrator or super user.



The user can open the user settings from the toolbar within the individual modules. The user settings can also be accessed via **View - Settings - User**.

Who is the administrator?

The system requires that at least one user is set up with full access/super user status. Full access/super user is a separate option, but if you are to set up a user with system administrator status you also assign that user certain access rights. The difference is that a Super user has access to everything, whereas the system administrator has access to functions that naturally belong to the work processes associated with system administrator tasks. A user whose access profile includes **Full access/Super user** is usually the same person who has the ultimate administrative responsibility within the system.

User name and password

Under User administration you enter the employee's **User name** and **Password** that are used when logging in to the program. The Password must be entered both into the **Password** field and the **Confirm Password** field. This is to ensure that the password is correct.

Link to employee

You can link a user to an employee from the Employee Register. If the user is not created as an employee, you can create a new employee when saving the user details.

E-mail

This is where you enter your e-mail address. This address will later be the sender's address for all your e-mails sent from the program.



If you have Microsoft Outlook installed on your computer, you can click on the search button to retrieve your e-mail address from your user account there. The program can also be synchronised with Outlook. Read more about: e-mail in the chapter "Contact Management", in the introduction book "Complete CRM, Sales Management and Web Solutions".

Automatic log on when user name is the same as in operating system:

Select this option if your Mamut user name is the same as your user name for logging in to Windows. This way you avoid having to log into Mamut Business Software upon starting the program.

User Access Rights

The function for assigning user access rights in Mamut Business Software has been developed bearing in mind that several users are working with the same system. With the help of the user access rights, the system administrator can ensure that the various users do not have access to all components of the system, but only those functions they need in order to complete their work.

Other

Under the **Other** tab you can enter several more settings which may help to simplify the startup and usage of your program.

User Settings - User Access Rights

Within the user settings, the tab for **User Access Rights**, defines the access for each individual user, based on pre-defined templates or individually defined templates.

Full access/Super user: Provides full access to all functions in the program.

Access template: An access template is a setup containing certain user access rights for a defined selection of program functions. A different access template can be created for employees working in Sales, Logistics or Accounting, for example. When selecting an access template you can then also pick the required user access rights for the user. You can select between default access templates that are included in the program or user-defined ones. By clicking **Show contents**, a complete overview of the functions contained in the access template will be displayed.

There is also an access template for **System administrator**. This template gives access to the typical administrating tasks in the system such as changing the backup settings, editing user access rights etc. You can see the content of every access template by clicking on **Show contents** for the chosen template.

User-defined: A user-defined access template defines which functions a specific user should have access to. The access profile can be defined in the same way as an access template, but it will not show in the list of access templates. In the wizard for the administration of user access rights you can base a user-defined access profile on an access template or an existing access profile.

Company databases: The list of company databases displays all the available company databases that a user has access to. By clicking **Clear all** you can remove access to all company databases except the one you are logged onto. It is also possible to clear the check-boxes for individual company databases that the user should not have access to.

Read more about user administration and user access rights in the chapter "Administrator".

User Settings per Module

In **Settings per module** each user (or system administrator) can adapt and set desired settings for the various modules within the program.



The User settings are also available from each individual module by clicking on the **User Settings** button.

Please note that the Company settings you make for the company database, apply to all users that work in the company database, while User settings only apply to the single user.

The User Settings are explained in more detail within the individual module chapters.

User Settings - Other tab

In the **Other** tab you can select several settings that may help you to simplify startup procedures and program use.

Default company database: Mark this and select the company database you want from the drop-down list. The selected company database will open automatically when you log in.

Language: Every user can use the program in his or her **Language**, if the desired language is available. Note that the program must be restarted before the settings take effect.

Window when opening company database: Provides direct access to key figures for logistics, finance, sales or for the selected module when opening the company database.

Open mini-calendar when opening company database: Select this if you want a mini-calendar to open automatically when you open a company database.

Automatically open project list on opening of the project card: Select this if you want the project list to open automatically when you open the project card.

Separator: By default an option is selected that ensures the program complies with the regional settings on the computer. If you want to change the decimal or thousand separators, you must clear the option to comply with regional settings and select the desired character from the drop-down list.

Options for Help: Choose whether you want to use the Online or the Offline (integrated) help. The Online help requires an Internet connection. If you select this option while not being connected to the Internet, the system will automatically launch Offline help.

Notes: In the **Notes** field you can enter any free text about the user or the user can add his/her own notes here.

Company

Company Settings



In the Company database you register all central information about the company. Names, addresses and other contact information will be retrieved by creating quotations and orders and reflects in reports that contain company information. Most of the fields will be pre-filled for the first time startup wizard of the program or for the wizard for the creation of a new company database.

CEO: The name of the company's CEO. The field can be used when printing reports.

Country: You cannot change the country once the company database has been created.

Language: It is possible to select a different language from the default language associated with a country. Please note, however, that the program functionality is based on the country setting, as are VAT rates and rules, the Chart of Accounts, accounting settings, etc. If you would like that certain users will be able to use the program in their own language then this change can be made at user settings level.

The **Company Settings** tab is where you register information about the company's bank accounts, company registration number, VAT treatment, currency, VAT rates, and number series and from where you can manage the default values of the Properties Register.

Under the **Settings per Module** tab you may enter default settings for the various modules in the program. The settings you make here will apply to all users of the company database. The different module settings are explained in more detail in their specific chapters.

In the **Notes** tab you may enter information about the company.



Tip! Changes to a number of company settings automatically generate System-created Activities which contain information about who performed the change and when. Read more about System-created Activities in the "Administrator" section.

Financial Settings

To profit fully from the integration between modules in the program, significant information is stored in the main database.

Enter **Bank accounts** and **Account no.** on invoice along with the settings for **VAT no**, **VAT** and **Currency**. The integration means this information is stored once and for all, and will be reused in the other modules and at relevant reports.

If you click the **Number verification** button you will be able to choose from the drop-down lists if you want **No number verification**, **Number verification, notify in the event of error** or **Number verification, do not allow errors**. If you choose the last option, you will not be permitted to save the changes in the **Account information** window before a correctly formatted number has been entered.

The number verification feature can validate British, Irish, German, Norwegian and Danish bank account numbers.

Enter your company's **Company registration number**. Enter whether or not your company is **VAT** registered and the **Currency** in which you generally trade.

The drop-down list **Include country in the address** allows you to decide whether you wish to include or exclude the country name when showing addresses in the different modules of the program as well as when printing reports and labels. You also have the possibility to include the country only if it is different from the company database country.

In addition, by selecting the check box you are able to decide whether you would like to **Display the country code before the post code**.




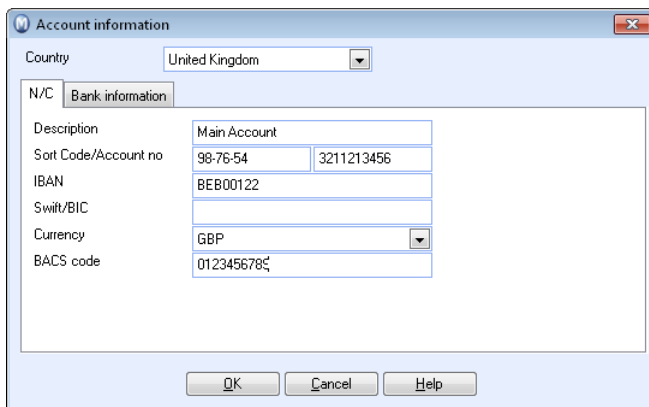
Click on the browse button to the right of the **Account no.** field to add information about the account, bank and account owner.

Account Information

The **Account information** window is a standard window which is used everywhere in the program where account numbers are entered. In addition to information about the account and the bank you can enter information on the account owner name and address.

Account information for your company is entered under the **Financial settings** button.

 Account information for your contacts is entered in the contact card under the **Other Info.** tab.



In order to avoid errors when entering IBAN and Bank account numbers, the system has been equipped with a number verification feature. Verification of numbers can be activated in the **Number verification** window, by going to **Settings - Company** and clicking the **Financial Settings** button.

Country: Select to which country the account belongs. Some fields are only available for certain countries.



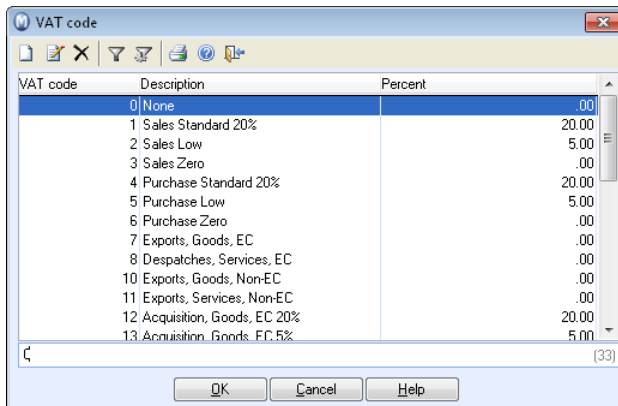
Note! Remember to click **OK** in order to save the information you may have entered before selecting **Country**.

You can find more details about account information in the help files.

The VAT Code Register



The **VAT Register** is where you can find an overview of all of the VAT codes that are available in the program.



VAT code	Description	Percent
0	None	.00
1	Sales Standard 20%	20.00
2	Sales Low	5.00
3	Sales Zero	.00
4	Purchase Standard 20%	20.00
5	Purchase Low	5.00
6	Purchase Zero	.00
7	Exports, Goods, EC	.00
8	Despatches, Services, EC	.00
10	Exports, Goods, Non-EC	.00
11	Exports, Services, Non-EC	.00
12	Acquisition, Goods, EC 20%	20.00
13	Acquisition, Goods, EC 5%	5.00



New: You cannot create your own VAT codes, only edit existing codes.



Edit: Changes an existing VAT code.



Delete: You cannot delete VAT codes.



Filter Off/On: Inactive for this window.



Filter Settings: Inactive for this window.



Print: Prints a list of all codes in the register.

Read more about the VAT register and VAT codes in the VAT section of the Introduction manual "Financials, Logistics and Human Resources".

Editing the VAT Codes



Editing VAT codes is limited to editing existing codes. In addition, the majority of settings in the VAT code window will be locked for changes; however, you will find that the current VAT codes cover most purposes.



You can edit a VAT code by going to the VAT code register, selecting the relevant VAT code from the list, and then clicking **Edit**.



If you wish to duplicate a VAT code then simply select the relevant code from the list, and click **New**.



Tip! If your business was not liable to pay VAT previously, you can change this under **View - Settings - Company - Financial Settings**. You will then also have to set VAT codes for accounts in the Chart of Accounts that are liable for taxation.

By editing a **VAT** code, which controls the position of the code in the list, you can adjust the order in the list for selections in other modules. This makes it easier to access the VAT codes you use most often.

The **Description** may also be changed if you want to indicate more clearly what the individual code will be used for.

You will find a more detailed explanation of the different fields in the VAT Code window in the "Settings, Reports and Filters" introduction manual.

Main window

VAT Code: Denominates the VAT type's place in the list. By changing the code you can adjust the order in the list for selections in other modules. This makes it easier to access the VAT codes you use most often.

Description: Can be changed if you want to indicate more clearly what the individual code will be used for.

Show in Journal Entry: Whether the code will display as an option in Journal Entry.

Show in Product: Whether the code will be linked to a sales product.

Show in Sales and Invoicing: Whether the code will be used in the Sales/Invoicing module.

Show in Purchasing: Whether the code will be used in the Purchase module.

The VAT tab

The top three fields (**None**), **VAT** and **Export** indicate whether the code is a VAT code or not. (**Export** does not have a VAT code, only because it is Export)

Percent: Indicates the percent rate used for calculating VAT. In United Kingdom this is 20%.

Function: Can be **Input** or **Output**. **Sales** are 'Output VAT' and **Purchases** are 'Input VAT'.

Default Sales N/C: This account will always be credited when invoicing products with this VAT code. The exception is if a different Sales N/C has been specified particularly for this product.

Default Purchase N/C: This account is always debited on entering purchases with this VAT code. If your program version contains Logistics functionality the account can be changed when posting a purchase. There are also individual settings at product level that will override the default cost account.

VAT Account: This is the account into which the VAT amount is entered in the balance sheet.

VAT Proportion Numbers: Are used by companies with operations that are partially VAT exempt and partially VAT liable. For joint purchases, a percentage distribution is used, indicating how much of the price of a product is to be included in the VAT calculation.

Show on Turnover statement: This applies to program versions not including Accounting, where you can extract a turnover statement. Here you choose whether the code is to be included on the statement.

The Foreign Service tab

The screenshot shows the 'VAT code' dialog box with the 'Foreign service' tab selected. The 'VAT code' field contains '4' and the 'Description' is 'Purchase Standard 20%'. Under 'Show in Journal Entry', 'Show in Product', and 'Show in Purchasing' are checked. The 'Foreign service' section has 'Foreign service' checked and 'Deductible' selected. The 'N/C for estimated VAT' is '0010 Freehold Propert'. The 'Basis N/C 1' and 'Basis N/C 2' are both set to '(none)'. The '1. VAT due in this pe' field is empty. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Foreign Service: If this setting is selected, services purchased from abroad will be tax-processed. You can read more about this below.

Deductible/Non-deductible: Determines whether taxes paid on services purchased abroad are to be deducted.

N/C for estimated VAT: This is the N/C under which the tax is entered on the balance sheet.

Basis N/C 1: This is the N/C against which the VAT base for the calculation is entered.

Basis N/C 2: This is the N/C against which the VAT base is balanced (to make the journals balance).



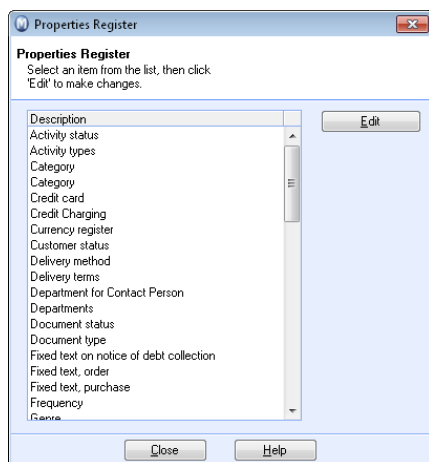
Tip! Amounts entered into an account with a VAT code set as a **Foreign service** are always entered as net, even if the option **Enter amount without VAT (net)** has been activated in the user settings for journal entry.

Properties Register

The properties register consists of various definable groups, categories, and variables that are used in one or several components of the program. You can adapt the values in the register to your own company and routines.

You can enter values for Department, Payment terms, Document types, User-defined fields, Fixed text on Sales reports, Groups, Categories, Delivery terms, Product groups, Titles, Currency etc.

The properties register can be found by navigating to **View - Settings - Company - Properties Register**.



Editing directly in the Properties Register

1. Select the register that you wish to change and click **Edit**.
All the options in this register will become available.
2. Click **New** to create a new value or **Edit** to edit an existing value.



Depending on which register you are editing, there are separate settings for the options.

Editing through drop-down lists

From several of the drop-down lists in the program you can right click and go directly to the **Properties Register** to edit.

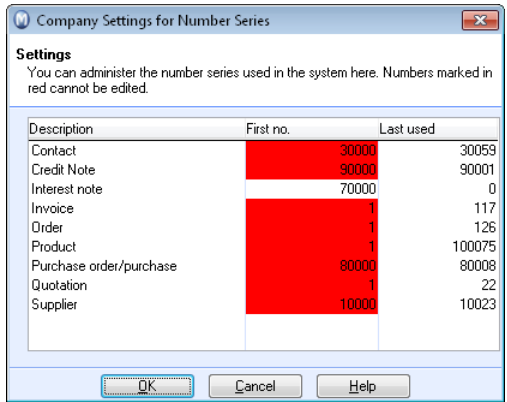
1. Right-click the mouse directly in the drop-down list you wish to change.
2. Select **Change in Properties register** from the shortcut menu.



This opens the same window as above, where you can edit the values and immediately use them in the module.

Number Series

Several of the most important modules in the program are larger registers containing a large number of registrations. Each entry is thus registered with its own unique number, acting as an important reference.



Description: This column shows which registers contain number series that you can control. Note that the number series for journals are controlled from the Accounting Settings.

First no.: Shows the first (lowest) number in the series.

Last used: Shows the highest number in use or the last used number.

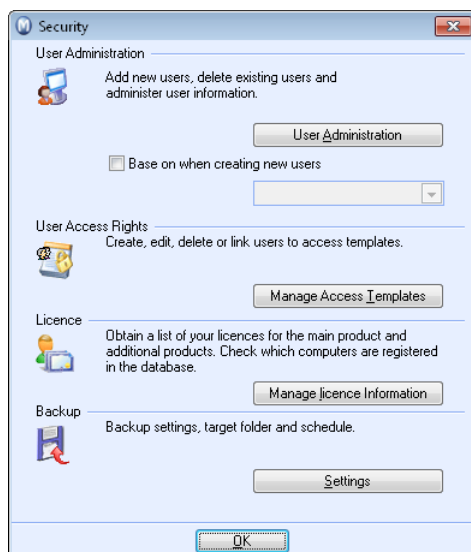
Numbers that cannot be changed are highlighted in red.

You can find out more about number series in the program in the chapter "Getting to know the Program".

See the chapter "Accounting" in the "Financials, Logistics and Human Resources" introduction manual for more information on journal numbering.

Security Settings

In the **Security** settings window you have access to all the settings that apply to users, user permissions and security in the program.



User Administration

Here you can create new users, specify settings and administer access for users. You can also choose to create new users based on existing ones by copying the default settings of the user you are basing the new one on. This can easily be done by checking **Base on when creating new users** and selecting the employee you want to base on from the drop-down list.

Manage Access Templates

An access template is a set of permissions that applies to all users linked to the access template. Here you can specify important security settings for controlling access to the database. You will be able to create new access templates, edit and delete access templates that you created yourself and link users to an access template. Each user can only be linked to one access template. The Super user can export the user access rights to Excel for a detailed overview over the access rights for every single user.

Manage Licence Information

Lists your licences and allows you to administer who will have access to additional products. You also see an overview of which computers in the network the program is installed on.

Settings

You define settings for automatic backup here.



Note! 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.

Who is the system administrator?

The systems requires that at least one user is created with Full access/Super user status in his/her user profile. When selecting Full access/Super user you do so as a separate choice. However, when as system administrator you then create users later on, you need to assign the user an access template. Thus, the difference is that a Super user has access to all components of the program while the system administrator has access to functions that naturally form part of system administrator tasks.

More information

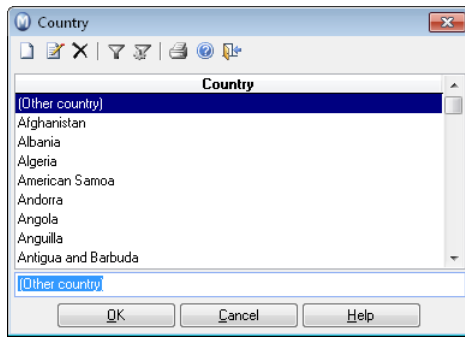
You can find out more about these functions in the Administrator section of the "Settings, Reports and Filters" introduction manual.


Other Settings


Under **Other settings** in the main **Settings** window you will find common registers and paths to other programs (e.g. Microsoft Office).

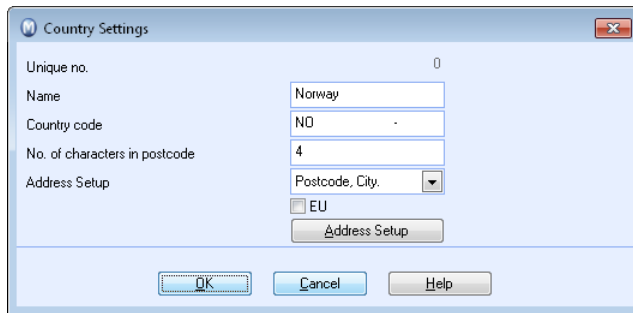
Country Register

In the Country register, you can specify the registration method for recording addresses and codes in different countries.



 If you need to make changes for a country you can mark the country in the list and click **Edit**.

 If you need to add a country, click **New**.



You can then change **Name**, **Country code**, **No. of characters in Post code** and decide **Address setup**. Select the check box **EU** if the country is a member state.

If you click the **Address Setup** button, you can define how set up of Addresses, contact name and contact person is displayed in all reports. Read more about address setup in the chapter "Reports".

City Register

In the **City Register** you can create and enter postcodes and cities when you need.

How to register a new city into the City Register

1. Go to **View - Settings - Other Settings - City register**.
2. Click **New** to register a new postcode or City.

The **settings** window for Town/City opens.

3. Enter the new Postcode, Town/City and Country.
4. Click **OK**.



The new entry is now available for selection.



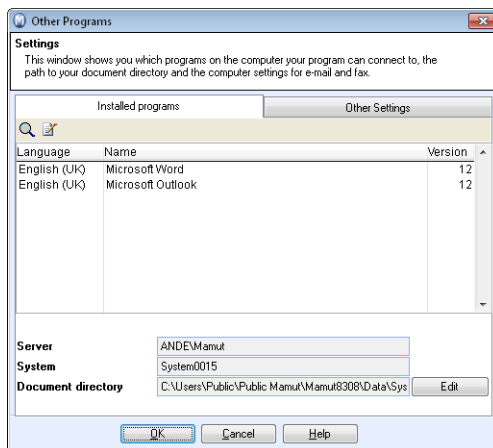
Tip! If you want to display the country code before the postal code, select the setting **Display country code before the postcode** under **Company Settings - Financial Settings**.

Other Programs

You select the settings for Microsoft® Office® programs that are integrated with Mamut Business Software in the **Other programs** settings window under **View - Settings - Other Settings - Other programs**. You can also select the settings Telephone/Fax, E-mail and List separator here.

Installed Programs

Displays the programs you have installed which are integrated with your Mamut program. If the information displayed is not consistent with what is actually installed on your workstation, you can click **Search** to update the information. Alternatively you can double click the relevant line and make changes manually.



Server: Displays the server name and instance.

System: Displays the system database on the SQL Server.

Read more about the database in the chapter "Administrator" within the introduction book "Settings, Reports and Filters".

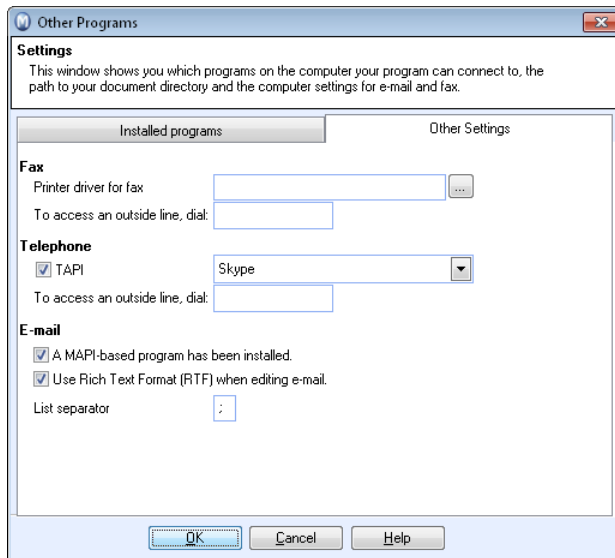
Document directory: Displays the location to the document directory for Mamut Business Software. Files that are not a part of the database are saved in the document directory, for example word documents, PDF and more. The location is decided in connection with the first time startup of the program. The document directory must be shared within the network if you have installed a multi-user installation. Furthermore, the document directory can be placed in a different location to the database.

Edit: You can change the document directory by writing in a new file path here. The documents will then be copied to the new area and the system will then save new and edited documents to this area.



Note! In a multi-user environment you must ensure that no other users are logged on when you change the file path. In addition, you must ensure that you have the access rights of a Super user in order to be able to move the document directory.

Other Settings



Telephone/Fax: Here you can select the fax printer driver and register a number to get an outside line if necessary. The printer driver selected will be used when printing to a fax. In order to fax documents directly from the program, you must install WinFax.

TAPI: If you have a TAPI 3.0 or higher driver installed on the PC, you will be able to select this option to use TAPI and call out directly from Mamut. You can also select the **Skype** program for telephone calls directly from the program. To find out more about Skype integration see the help files. In order to use the program's TAPI-functionality, you must first activate your computer's Telephony' service. You can activate this function by opening the Windows® Explorer® and right-clicking **My Computer - Manage - Services and Applications - Services** (in Windows XP®) or **Computer - Manage - Services and Applications - Services** (in Windows 7®).

E-mail: Select this if you have a MAPI based E-mail program installed. Also select this if you want to use Rich Text Format (RTF) when editing E-mails you create using Mamut.

List separator: You can change the list separator here. It is important that the list separator in Mamut is the same as the one specified in the regional settings in Windows. If this is not the case, problems will arise when, for example, you merge documents.

Chapter 4:

Administrator

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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 on sales@mamut.co.uk or by phone on 0207 153 0900.

The Database

Microsoft® SQL Server® Database

Mamut Business Software is based on the Microsoft® SQL Server database. The Mamut Business Software installer will detect any previous Microsoft SQL Server installations automatically. Microsoft SQL Server will be installed if no previous installations are detected.

If you choose the default single-user installation, the program will only be used on one computer; this computer will act as the database server.

If you choose a multi-user installation, one of the computers within the network will act as the database server. If no previous installation can be detected on this server, the Microsoft SQL Server will be installed.

If you choose a client installation - through which you connect to a database server already available within the network - you will not be required to install Microsoft SQL Server when installing the Mamut Business Software program files.



Note! You should avoid changing the name of the computer containing the SQL Server database since this may create problems for other programs using SQL Server.

Instance

A database server can have several different instances. When installing Mamut Business Software, MAMUT will be suggested as the default instance name. You can enter a different instance name if you already have access to an existing instance for example. In order to get a full overview of the systems, it is recommended that you create your own instance for the Mamut Business Software database.

The database server name will often consist of the server name plus the instance name. An example of a database server can be: SERVERNAME\MAMUT.



Note! Instance name is only required if you will be running several SQL Servers on the same computer.

An instance can contain one or several databases. The Mamut Business Software database consists of one system database and one or several company databases.

System Database

The program's database consists of company database files and system files. The company database files contain data relevant to the various company databases, while the system files contain data which is shared by all company databases. Shared information can, for example, include information about users and access information.



Tip! Information about the server name, instance and system database is stored in the settings under **View - Settings - Other Settings - Other Programs**.

Company Database

A company database represents one business or part of a business. Where book-keeping agencies refer to 'clients', other users handling several companies may view one company database as one company/organisation. It is possible to manage several company databases in a single program installation. The maximum number of company databases is determined by your licence.

Security

The SQL Server installed with Mamut Business Software uses SQL Authentication by default. The system administrator can differentiate between the users' database access in the SQL Server.

Database Maintenance

Maintenance tasks such as repairing, re-indexing, or compressing the database are performed using a separate application called DataTools. DataTools is a tool for database administration, and supports the most common administrative tools for the SQL Server-based databases. The application is automatically installed with the installation of Mamut Business Software and it can be launched by double-clicking the file MDataTools.exe. This is located in the DataTools folder, where the Mamut Business Software program files were installed. You can find the location of the program files by navigating to **File - Database Utilities - Go to the System's Program Folder** within Mamut Business Software.

In addition to maintenance tasks, you are also able to create and restore backup copies using DataTools. More information can be found within the DataTools help files.

Performance

The Microsoft SQL Server has its own limitations which are handled by Microsoft. You can upgrade to a larger version of the SQL Server database software or install a larger version side by side of Microsoft® SQL Server® Express. Read more about this on our website.

Complete and updated system recommendations can be found here:

www.mamut.co.uk/system

Company Databases

A company database within Mamut represents one accounting set/one unit. Accounting firms often refer to this as 'clients', whereas a company database for others, handling several companies, means one company/business. You can have several company databases in a single installation of the program. The maximum number of available company databases depends on your program licence.

When starting the program for the first time, you will be guided through a wizard that will help with the most important settings required to get started. A number of settings are set by default. Much of the core data is already included and you can select to use some of this data, e.g. you can choose to apply the chart(s) of accounts that come with the program.

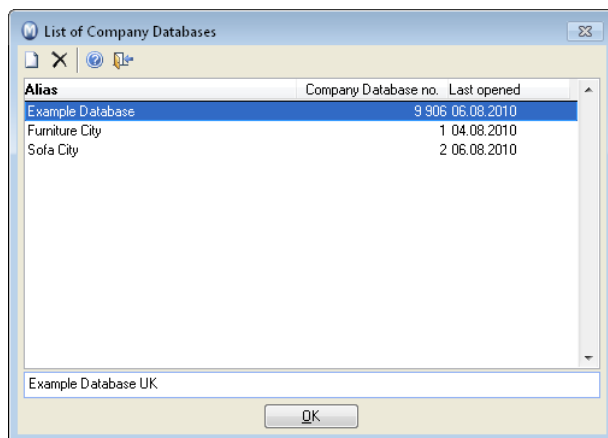
Later on, you can create more company databases. When you do so, you will be able to select whether you want to 'take information with you' from another company database. This will help you save time adjusting the settings for the new company database. You can also select to copy contacts and other information to the new database.

It is possible to create a new company database on a work station within a multi-user environment; this can take a long time. If you may are running Windows XP with Servicepack 2, it is recommended that you create new company databases on the server machine.

When you create a new company database, you may also select to do so with the help of a wizard.


Opening a Company Database

Once you have logged into the system, the **Company database list** will be displayed. Here you can select which Company database you will work in. The list displays the **Alias name** for each company database in your installation. Double-click a line in the list to open the relevant company database.




A company database is registered with an **Alias** name. This is meant to be a short name for the Company database, and is used when you log on and select which Company database to work in. The Alias name can be changed. The name should not include special characters, spacing, full stops etc. The Alias name will be shown in the title line at the top of program window when you are logged on.

 Create a **New company database** by clicking **New**.

 If you delete a company database all the data stored in it will be lost.

If you wish to switch from one company database to another, you can select **File - Open Company database**.

 **Tip!** You can select a **Default Company Database** in the user settings. This saves you having to select a company database for opening in this window every time you login.

Creating a New Company Database

A Company database in Mamut represents one account/one unit. Accounting firms usually refer to 'Clients', while for others who handle several companies; a database is the equivalent of firms/companies. You can have several company databases in each Mamut installation. The maximum number is limited by your licence.

You can have several company databases in a single installation of the program. At the first time startup you are asked to create a company database. Later on you can always create more company databases.

Creating a new Company database during the first time startup

As part of the first time startup wizard you will be offered help with setting up a Company database. The first step of the wizard is to enter all Company Settings.

Creating a new company database in an existing installation

When you create a new company database you can select to copy information from another database in your installation. The information you bring with you includes, the Product Register, the Chart of Accounts, and the Employee register, for example. This allows you to save the time it takes to create/edit these from scratch, if they are similar or almost similar for the various companies.

How to create a new Company database with your own/new data:

1. Log into the program and select **File - New Company database**. You can also click **New** in the window named **List of Company databases**. This window will open after you have entered the user name and password.
2. Enter an **Alias name**. A company database is registered under an Alias name. This is meant to be a short name for the company database that you use when you log on and are selecting which company database to work in. The alias name can be changed and should not include special symbols, spacing, full stops etc.
3. Select **New company database** from the list of options. This will initiate a wizard that will guide you through the most vital settings.
4. Select whether you wish to make use of the wizard or not. If you decide not to work with the wizard, you should only register your Company settings before the company database is being created. You need to enter the **Accounting Year**, **First month of the accounting year**, the number of **VAT periods** and the company's **VAT** no.
5. If you are working with the wizard, you will need to enter you Company Settings first. .



A new company database is being created. You can now start entering data into it.

How to create a new Company database based on data from an existing company database:

1. Log into the program and go to **File - New Company database**. Alternatively, you can click **New** in the **Company database list** that opens after you have entered your user name and password.
2. Enter an **Alias name**. A company database is registered under an Alias name. This is meant to be a short name for the company database that you use when you log on and are selecting which company database to work in. The alias name can be changed and should not include special symbols, spacing, full stops etc.
3. Tick the box for **Copy information from an existing company database** if you would like to base your new company database on information retrieved from an existing company database.
4. Select which company database to base your new company database on. First, select the company database. Next, select which registers should be copied to the new company database.
5. Click **OK**.



A new company database is being created. You can now start entering data into it.

How to delete all data in a System Database

If you have just started/installed, and have not registered any data within Mamut that you would like to keep, you can cut out numerous folders from the **Data** folder. This way you delete everything that has been stored, allowing you to start over.



Note! This procedure deletes all data stored in your database. Therefore it should only be used if you do not wish to keep any of the data. The advantage of this method is that you can start working with an empty database without having to go through the installation process again. The procedure does not remove all files installed by the program.

How to delete all data in a system database and start again

1. Close the program.
2. Open the **Windows Explorer**.
3. Find the location of the data folder.

From version 12.1, the data folder is usually located here:

Windows XP®: C:\Documents and settings\All Users\Public\Mamut\Mamut

Windows Vista® and Windows 7®: C:\Users\Public\Public Mamut\Mamut

The update will not change the location of Data folders installed for versions prior to version 12.1. Only the mamut.ini file will be moved if you are updating from a version older than version 12.1.

4. Delete the Mamut folder.
5. Start the program.



The program will start the First time startup wizard, create a new empty database and you will be able to enter your preferred user name and password.

Uninstalling the program

Use the Windows Add/Remove Programs tool, located in the Control Panel, if you wish to remove the entire program. You can also use the install application on the DVD. The procedure outlined above should only be used if you want to restart the program without any data.

Database Utilities

There are a number of database utilities to help you manage the program. Some of these are password protected, in order to protect your system from unauthorized use, among other reasons. Others have been created purely for use by the Mamut Support Centre or authorised retailers.

The utilities can be found under **File - Database Utilities**.

In help (F1), you can find more information about the database utilities.

Example Database

Install a new company database containing sample data.

Edit posted invoices and journals

Opens a window for editing posted invoices and journals. You are required to authenticate yourself to use this functionality and will not be able to access it if you are not set as a **Super user** or have not activated it within the Company Settings for Sales and Invoicing.

System Information (Microsoft Info)

Displays system information if Microsoft Info has been installed on the computer.

Go to the System's Program Folder

Opens the folder containing the system's program files in Windows® Explorer.

Go to the System's Data Files

Opens the folder containing the system's data files in Windows® Explorer.

Go to the Company Database's Document Directory

Opens the folder containing the system's company database files in Windows® Explorer.
Read more about the document directory .

Go to the System's System Data Files

Opens the folder containing the system's system data files in Windows® Explorer.

For Support

This contains the functions that are for use by the Mamut Support Centre only.

Translate system tables

This tool translates the language in the system tables to the operating language. This may become useful when you have changed the language of your program installation.

Download system files

Every now and then the software provider offers a system update which is available for download via the Internet. To update, use the database utility **Download system files**. Please note that this function is only available to the system administrator/super user. Read more about updates .

Company Handling

Company handling helps you create accounts within your Chart of Accounts for several company databases/clients at once. This may be particularly useful if you have a number of company databases with identical or very similar Charts of Accounts. Read more about company handling in the section on Chart of Accounts in the introduction manual "Financials, Logistics and Human Resources".

Installed Files

Division of Files

The program's database consists of company database files and system files. The company database files contain data relevant for the various company databases, while the system files contain data which is shared by all company databases. Shared information can, for example, include information about user and access information.

The program files are divided so that files created or changed, when installing and updating the system, are saved to a separate location. In Windows Vista® and Windows 7®, files saved to C:\Program Files can only be created or changed by using Windows® Installer.

Files which are meant to be created or changed by the user are saved to a location to which the user(s) have access. Managing user access is the responsibility of the system administrator, externally to the program, which means that it is the system administrator's responsibility to allocate the relevant user access when installing a multi-user version of the program.

Default File Location when Installing

You can install the program files anywhere you like, however the default file path is:

Program files:

Windows XP® and Windows Vista®: C:\Program Files\Mamut.

Windows 7®: C:\Program Files (x86)\Mamut.

Document files and mamut.ini:

Windows XP®: C:\Documents and settings\All Users\Public Mamut\Mamut.

Windows Vista® and Windows 7®: C:\Users\Public\Public Mamut\Mamut.

Each system database gets its own area, system0001, system0002 etc. In a multi-user installation the user must provide a network path during the installation/update. The location needs to have shared access for all users. We advise you to use the structure \Public Mamut\Mamut.

System and Client Databases:

Windows XP® C:\Documents and settings\All Users\Public Mamut\Databases.

Windows Vista® and Windows 7® C:\Users\Public\Public Mamut\Databases.



Tip! The system administrator can override the location of the database files by defining an "Environment Variable" in Windows command prompt: SET MamutDatabaseLocation=c:\databases (example). Users must then be given access to the area.

C:\ represents your computer's hard drive.



Tip! You can easily access the file locations from Mamut Business Software. Within the program, navigate to **File - Database utilities**. Here you will find links to the system's program files, data files and system files along with the document directory of the active company database.

Installation

New installation: When installing for the first time, the program will suggest C:\Program Files as the location for the program files. The suggested location of the Library folder and the mamut.ini file is described above in the section "Default File Location when Installing".

If you choose to install the program files to another location, the structure of the data area will mirror the structure of the program files.

Updating: When updating, the new program files are installed to the file path you specified during installation. The Library folder and the file mamut.ini are installed to the location as described above in the section "Default File Location when Installing".

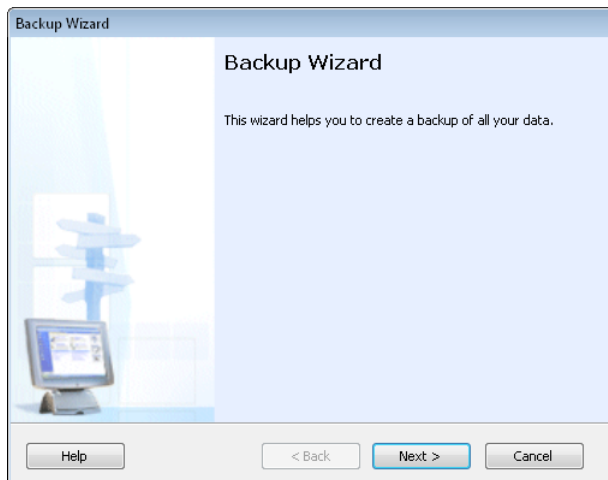
API

API (Application Programming Interface) is a technical interface for programming toward an application.

Mamut API is a supplementary product to Mamut Business Software, which makes it possible to export information from and enter information into the Mamut systems without using Mamut's normal user interface.

API integrators will receive the relevant API documentation.

Backup



The importance of creating a backup can never be emphasised enough. Sadly, the importance of backing up your work is something which becomes apparent when it is too late, for instance when a computer crashes or is stolen. If you do not have a backup copy, all your work will be lost and you will have to start over again. The user, or your IT department is responsible for implementing routines for regular backup of your data.

Frequency

The frequency of backup depends on how often the program is run, and the way the program is used. As a general rule, you should perform a backup every time you have worked in the program. By default, you will be asked whether or not you want to automatically create a backup every time you shut down Mamut. If you answer **Yes** to this question, you will always have an updated backup available.



Note! If you are not prompted about whether or not to create a backup when exiting the program, this may be because your backup settings have been changed.

In the event of a system crash, it will be time-consuming and difficult to reconstruct the database. Therefore, for frequent program use we recommend that backups are taken daily. You can customise backups in accordance with your own requirements and storage possibilities. Backup copies can be made for one or more company databases at a time, and can be split into smaller files for storing media with limited space.

It is possible to create User access rights so that only a few select users can create backups.

Storing backups

Backups can be taken to the hard drive, a shared folder in the network, or to an external media such as USB pen drives, Zip drives or similar. We recommend that you store at least one complete backup in a separate location from the computer using the program, in case the computer is damaged or stolen.

Password protected backup copies

You can restrict access to your backup copies by using a password. Please note that you must remember the password in order to restore the data. Please be aware that Mamut Support Centre will not be able to help you to re-obtain the password.

Restoring backups

Backups are restored with the help of a wizard. Program data is then overwritten with the data from the backup so that your company database is restored to the state it was in when you originally created the backup. If you have registered any data in the program since, it will be lost.

About the database

The database program consists of company database files and system files. Company database files contain data for the different company databases, while the system files contain data common to all company databases. An example for system files are user information and user access rights.

Mamut Online Backup

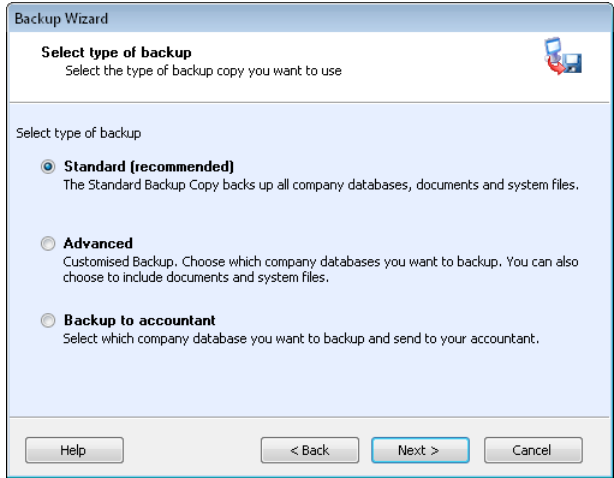
Mamut Online Backup allows you to perform secure and efficient backup and to distribute your files safely in an easy, user-friendly way! More information can be found online: www.mamut.co.uk/onlinebackup. Mamut Online Backup is easy to use and encrypted backups are taken continuously while the user is 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 programs own function for this in a secure manner. Read more about the service at www.mamut.co.uk/onlinebackup.

Different types of backups

You can choose which type of backup you would like to create. The standard (recommended) backup type is pre-selected when launching the **Backup Wizard**. If you are in need of a more advanced backup, you are free to choose one of the other alternatives. If your program licence includes accounting functionality, you will also be able to create backups which can be sent to your accountant for review.


Standard backup

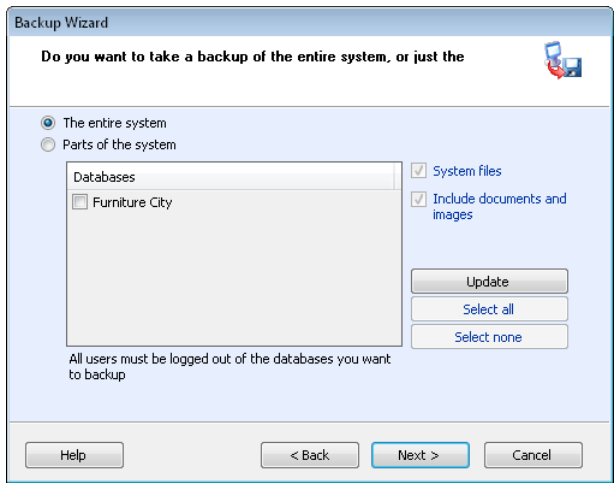
Standard backup creates a backup copy of all company databases, documents and system files. This alternative is set as a default backup since it creates a backup of all data.




Advanced backup

The purpose of creating advanced backup can vary. It provides the opportunity to separate company databases, as well as excluding some data. Through advanced backup you are able to select which company databases the backup should include, and whether the backup should contain system files and/or documents and pictures.

 **Note!** Backup without system files must be the same version as the program in order to be restored.

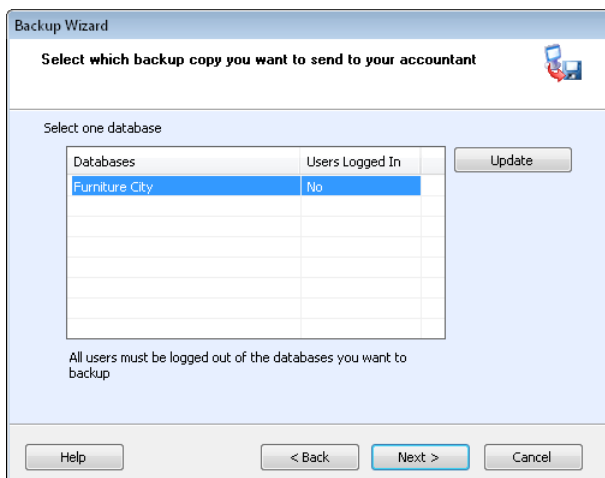


By excluding unnecessary information that is not required in the backup, the backup process will be quicker and the backup copy will be smaller and take up less space.

 **Note!** It is recommended that the routine backup should include all data.

Backup copy to accountant

This is only available if you have an Accounting program included in your licence. If you want to send a copy to your accountant or others, you can tailor backups to suit your specific needs. The selection gives you the opportunity to choose which company database the backup should include.



Backup Wizard

Select which backup copy you want to send to your accountant

Select one database

Databases	Users Logged In
Furniture City	No

Update

All users must be logged out of the databases you want to backup

Help < Back Next > Cancel

General information about System Files

The database program consists of company database files and system files. Company database files contain data for the different company databases, while the system files contain data common to all company databases. An example of system files, include user information and user access rights.

Backup copies **with** system files can be of the same or lower program version number than the one which is installed. Backup copies with system files of a lower version number will be updated automatically when they are restored.

Backup copies **without** system files, must be of the same program version number in order to be restored. This type of backup contains less data and is therefore quicker to create/restore.

Backup to accountant

If you need to send a backup copy of one or several of your company databases to your accountant, select this alternative in the backup wizard.

You will be given the opportunity to select the company database that you want to create a backup copy for. It is not possible to create a backup copy of multiple company databases at the same time when you make a backup for your accountant. If you wish to create a backup copy for more than one company database, you will have to go through the wizard for each company database.

Since backup copies intended for accountants, do not contain system files, you and your accountant must have the same program version. If you have different versions, you will not be able to exchange data in the form of backup copies. The version number can be found under **Help - About**.

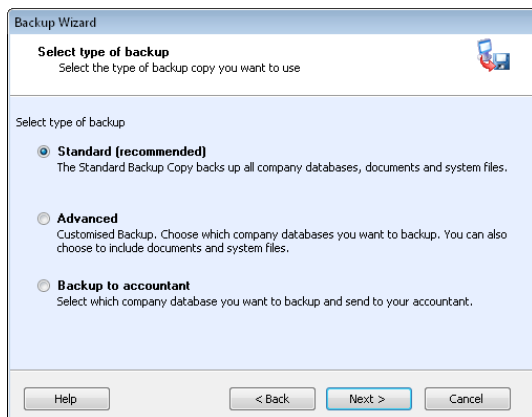


Note! You cannot continue working in the company database when it is being reviewed by your accountant. You must wait until your accountant has finished updating the database and returned the files to you - in the form of a new backup copy - before you can enter new data.

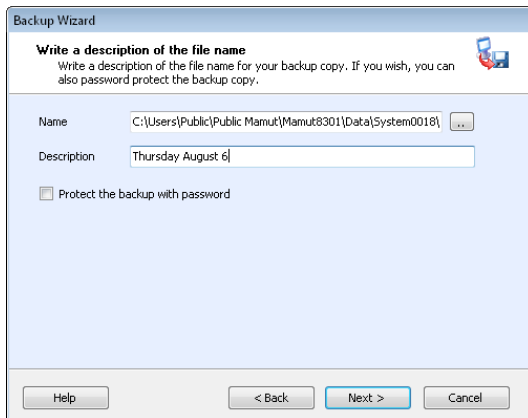
How to Create Backups

How to create a default backup copy

1. Go to **File - Backup - Create backup** and click **Next**.
2. Select which backup type you wish to create (**Standard** in this example) and click **Next**.



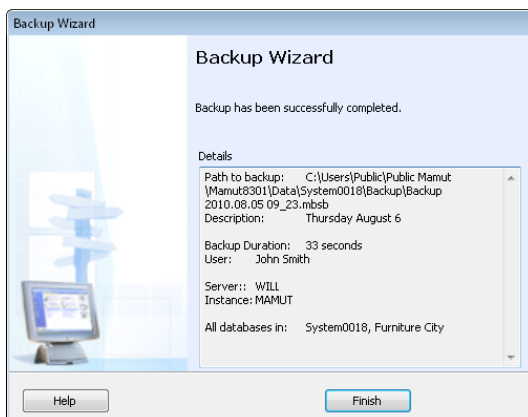
3. Enter a **Description** of the backup if you do not want to use the default description.




Name: A file path and name will be suggested based on the backup settings. You can override the file path by clicking on the search button and then entering the file path of your choice. The file path can also be a network file path, for example: \\SERVERNAME\DATA\System001\Backup\<filename>.mbsb.

You can select the option **Protect the backup with a password**. However, if you select this option, you **must** enter the password when you want to restore the backup.

4. Click **Next** to create the backup.
Detailed information about the backup will be displayed when the backup has been created.
5. Click **Finish** to complete the process.



 *The backup has now been successfully created.*

 **Note!** Creating backups may take some time, especially if the database contains a large amount of data.

About Restoring backups

There are several things you should keep in mind when restoring a backup copy via the wizard. You should be aware that the data in the program **will be overwritten** by the backup data. This means that if you restore a backup copy created a week ago, the data you have entered since the backup was created will be lost.

In order to restore a backup, the program files in the system where the backup will be restored, must be of the same version as the program files in the system where the backup was created. However, it is possible to restore an old backup containing system files onto a more recent program version. Please note that doing so will update the data and make it impossible to restore it on the original computer.

It is also possible to restore a backup during the installation, in the wizard for first-time startup, if you for example are moving the program to another computer. This will close the wizard and opens the wizard to restore the backup.



Note! It is **not** possible to restore a backup created in version 11 of Mamut Business Software using Mamut Business Software version 15.0.

When restoring backup copies, you have two alternatives:

Restore an existing backup of your database/program

If you wish to restore a backup which has been created in your program, or on a computer connected to the same database as yours, choose to restore an existing backup. A list of available backups will be displayed. Choose which backup you wish to restore.

Select the backup you wish to restore or if the backup is located elsewhere in the system, select **External Backup** and browse for the backup.

Restore an external backup

Select this option if you want to restore a backup which has not been created in your program or within your network. Enter the file path, or click **Browse**, to locate the folder containing the backup. The option could be used, for instance, if you want to restore a backup which has been reviewed by your accountant and returned as an e-mail attachment. In that case, you must first save the file on your computer and then locate the file using the **Browse** button.



Note! When restoring a backup, all information entered into the program since the backup was created will be overridden. In other words, your system will revert to the point in time when the backup was created.

How to Restore a Backup



Note! Backups that do not include system files must be of the same version as the program in order to be restored. Read more about this above.

How to restore a backup

1. Select **File - Backup - Restore backup** and click **Next**.
2. Select **Previous backup copy** and choose which of the backup copies you would like to restore.
Enter your password if you have protected the backup with a password.
3. Click **Next**.
4. Information about the backup is displayed in the information window. Ensure that the information is correct and click **Next**.
5. Read the **Important Information** and select **I have read and understood the information above** before clicking **Next**.



The backup is being restored. This can take some time, especially if the backup contains a large amount of data.

How to restore an external backup

1. Select **File - Backup - Restore backup** and click **Next**.
2. Select **External backup**. Enter the file path to the backup. You can either enter the path directly or click **Browse** to load the backup copy.
Enter your password if you have protected the backup with a password.
3. Click **Next**.
4. Information about the backup is displayed in the information window. Make sure the information is correct and click **Next**.
5. Read the **Important Information** and select **I have read and understood the above warning** before clicking **Next**.



The backup is being restored. This can take some time, especially if the backup contains a large amount of data.



Note! The program will close automatically when restoring a backup. Start the program when the restore wizard has been completed.

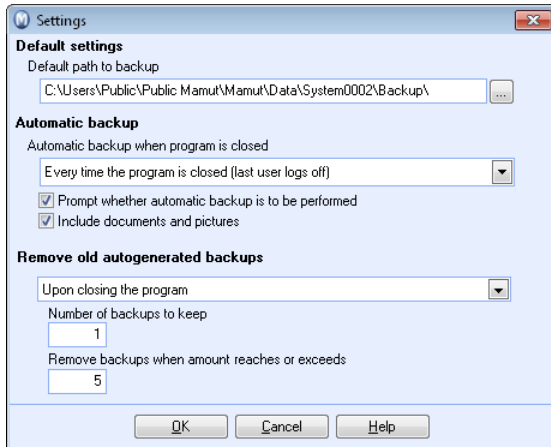
Settings for Backup

Within the backup settings you can specify a default location to which the backups will be saved. You can also specify when automatic backups are to be carried out and when old autogenerated backups should be removed.

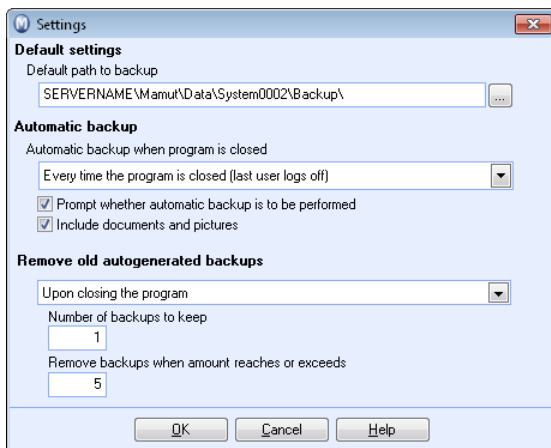
Default settings

Default path to backup copy: This is where you define the directory that the program will use during automatic backup and what the program is to suggest during standard backup. You can either enter the path directly in the field or click the **Select folder** button to specify one.

The system asks if you would like to create the folder you state, if it does not already exist.




Above: Example of a local file path.



Above: Example of a network file path.

Automatic backup

 **2Note!** Automatic backup means that the system will backup your system when the last user has logged out of the program. If one or more users remain logged in, no backup will be created. The timing of the backup is based on dates, which means that if you select "Every day", a new backup copy will be created when the last user has logged out and the latest backup copy was created at an earlier date. Click **View - Settings - Security - User Administration** to open a list of users who are logged in.

Automatic backup when closing the program: This is where you can define whether an automatic backup should be taken when you close the program. Automatic backups are only performed when closing the program. If, for example, you have set the backup to be taken once a week, the system will suggest creating the backup when you close the program after a week has passed.

The automatic backup copy contains all system databases and files for the system database.

Prompt whether automatic backup is to be performed: Select this if you want to be asked whether an automatic backup should be taken when you close the program.

Include documents and pictures: If you uncheck the check box, the automatic backup copy will not include documents and images. By doing so, the backup process will take less time and the backup copy will take up less space. The setting pertains to backups created automatically when you close the program.

Remove old autogenerated backups

In order to prevent a lot of space being used to store old backups, it is possible to remove old autogenerated backups. Autogenerated backups are backups that are created upon closing the program. Backups that have been manually created will not be removed by using this functionality. You can define when these old backups should be removed:


- **(none):** This means that the window **Remove old backups** will not automatically be shown upon closing or opening the program. However, you can still remove old backups via **File - Backup - Remove old backups**.
- **Upon closing the program:** When selected, the window **Remove old backups** will be shown when the last user closes the program (if the amount of backups exceeds the amount set below).
- **Upon opening the program:** When selected, the window **Remove old backups** will be shown directly after the first user logs into the system when opening the program (if the amount of backups exceeds the amount set below).

Keep number of backups: The amount of backups that should always be kept. The most recent backups will always be kept.

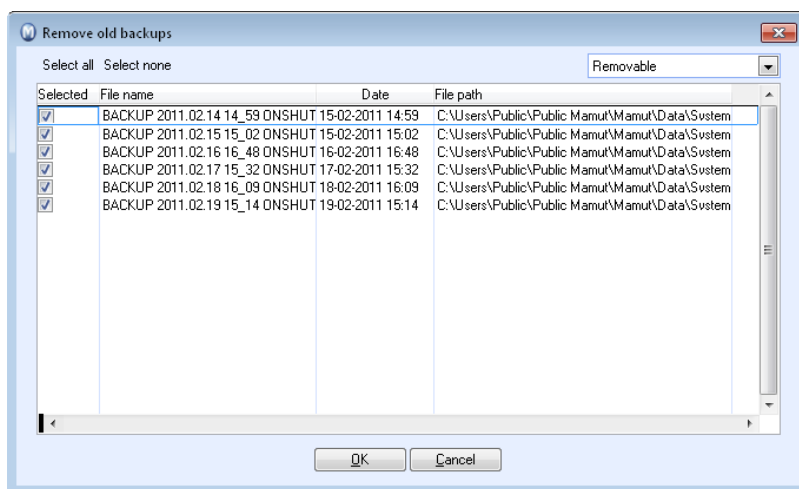
Remove backups when amount reaches or exceeds: This is the amount of backups that should be reached to trigger the automatic removal.

Read more about the window **Remove old backups** in the paragraph "Remove old backups".

Remove old backups

 **Note!** This functionality will only remove autogenerated backups. Backups that you have created manually, by going to **File - Backup - Create backup**, will not be visible in this window, and therefore not removed.

The window **Remove old backups** will be shown automatically upon closing or opening the program (based on your settings), or when you go to **File - Backup - Remove old backups**. Read more about the settings in the paragraph "Settings for backup".



Using the drop-down list in the top right corner, you can define whether you want to see the **Removable**, **To keep** or **All** backups. By default, only the backups that are removable are shown. It is not possible to remove the most recent backups using this functionality. The amount of most recent backups that will be kept is defined in the settings for backup.

Within this window, you can decide which backups you wish to remove by selecting them (by default, all removable backups are selected), or you can click **Cancel** to abort the operation. Only click **OK** when you are sure that you want to permanently remove the selected backups.

 **Note!** Automatically removed backups cannot be retrieved.

Moving the Program to a Different Computer/Server

It is possible to move the program and the database, for example from an old to a new computer or server.

Note that the only way to move the database is by using a backup. It is not possible to move the program files for Mamut Business Software; you need to install the program on the new computer. The procedure is dependent on the type of installation. After the installation, you will have the possibility to restore the backup in the wizard for first-time startup.

If you are installing a version that is newer than your current one, the database will be automatically updated. We recommend that you use the latest version at all times.



Note! If you are running an old version, you may have to restore the backup copy via a newer version and not directly to the most recent version. More information can be found on the Internet: www.mamut.co.uk/update.

Moving Single-User Installations

Single-user installation means that you are licensed to use the program on one computer. The program files must be installed on the computer on which you will be using the program, and uninstalled on the computer which you are moving from. You can, however, share the computer with other people and add users in the program.

Moving Multi-User Installations - Server

If you have installed a multi-user installation, you must move the document directory before moving the program. You must also make sure your users have access to the shared directories on this computer in order to access the document directory and database. The computer you choose to function as the server can be a dedicated server computer, or one of the users' computers.

Moving Multi-User Installations - Client/Workstation


If you are switching workstations, you must first set the "old" workstation as **Inactive** before installing on the new one and connecting to the server.

How to move: Single-User

How to move Mamut Business Software and the database to another computer:

1. Go to **Help - About - Manage licence Information - Installed computers** and select **Inactive** next to the computer name that you no longer wish to use, and click **OK**.
Note! Do not close Mamut Business Software, but immediately go to the next step.
2. Create a default backup via **File - Backup - Create Backup**. Read more about creating a backup in the chapter "Administrator". Make sure you save the backup to a location that the new computer has access to, or from where you can easily restore it, for example a memory stick.
3. Install the program files of Mamut Business Software on the new computer.
Read more about installing the program above.

Note! If you install a version which is newer then your current version, the database will automatically be updated. We recommend that you always use the newest version.

4. Start Mamut Business Software. This will open the wizard for first-time startup.
5. Select **Restore Backup** in the first step of the wizard and click **Next**.
The wizard for first-time startup will now close and the wizard to restore a backup will open.
6.  Select **External backup** and use the button to browse to the backup location.
If you have protected your backup with a password, you will be asked for the password upon selecting the backup.
7. Then click **Next** and again **Next**.
8. Read the **Important Information** and select **I have read and understood the information above** before clicking **Next**.
The backup will be restored and information about the backup will be shown once the restore has been completed.
9. Click **Finish** to close **MDataTools**.



The procedure is now complete and you can use Mamut Business Software on the new computer.

How to move: Server Installation




Note! All users have to be logged off before you start the below procedure.

How to move Mamut Business Software and the database to another server:

1. Move the document directory.
Information about how to move the document directory can be found in the paragraph "How to move the document directory".
2. Go to **Help - About - Manage licence Information - Installed computers**. Select **Inactive** next to the computer name that you no longer wish to use, and click **OK**.
Note! Do not close Mamut Business Software, but immediately go to the next step.
3. Create a default backup via **File - Backup - Create backup**. Read more about creating a backup in the chapter "Administrator". Make sure you save the backup to a location that the new server has access to or from where you can easily restore it, for example a memory stick.
4. Install the program files for Mamut Business Software on the new computer.
Read more about installing the program above.

Note! If you install a version which is newer then your current version, the database will automatically be updated. We recommend that you always use the newest version.

5. Start Mamut Business Software. This will open the wizard for first-time startup.
6. Select **Restore Backup** in the first step of the wizard, and click **Next**.
The wizard for first-time startup will now close and the wizard to restore a backup will open.
7.  Select **External backup** and use the button to browse to the location of the backup.
If you have protected your backup with a password, you will be asked for the password upon selecting the backup.
8. Then click **Next** and again **Next**.
9. Read the **Important Information** and select **I have read and understood the information above** before clicking **Next**.
The backup will be restored and information about the backup will be shown once the restore is completed.
10. Click **Finish** to close **MDataTools**.



The procedure is now complete and you can use Mamut Business Software on the new server.

As the database is now moved, the clients/workstations will no longer be able to connect to the database. Follow the steps below to reconnect the workstations to the database.

How to connect a client/workstation to a database:

1. Remove the mamut.ini from the client/workstation. By default you will find this at the following location:
Windows XP®: C:\Documents and Settings\All Users\Public Mamut\Mamut.
Windows Vista® and Windows 7®: C:\Users\Public\Public Mamut\Mamut.
2. Start Mamut Business Software.
3. Select **Connect me to an existing multi-user installation** in the wizard.
4. You can see which database server you connect to by clicking **Select database server**. In this window you can also test if you have access to the server.
5. Click **Next**.
6. Select the database, and click **Next**.
 If there are multiple databases on the server, you will receive a list over all of the existing databases.
7. Log in with the user name and password that you have received from your system administrator, and click **OK**.
8. Repeat these steps for all clients/workstations.



The connection to the database has been established.

How to move the Document Directory

It is very important that all users have full access to the document directory. If this is currently set to a location where you do not want to provide full access for all users, you can move the document directory. If you wish to start using a new server, you also have to move the document directory. In that case, first complete the procedure below before moving the server.



Note! The document directory is the folder **System000x** and all sub folders. The number which replaces the **x** is dependent of the amount of SQL databases that are created. In this example we will use **System0001**.

How to move the document directory:

1. Open Windows Explorer and browse to the current document directory.
Tip! You will find the current location of your document directory by going to **View - Settings - Other Settings - Other Programs** within Mamut Business Software.
2. Copy the document directory (the folder **System0001** with sub folders) to the new location. It is very important that you copy and do not cut and paste.
3. Write down the new path. Keep in mind that this has to be a network path, for example \\server\Mamut\Data\System0001.

4. Make sure that the other users of the program have full access to the new location. In the help section [F1], you can find more information about how to share the document directory.
5. Within your Mamut-program, go to **View - Settings - Other Settings - Other Programs**.
6. Click on **Edit** beside the **Document directory**.

Server	SERVER\MAMUT	
System	System0001	
Document directory	\\Server\Mamut\Data\System0001	<input type="button" value="Edit"/>

7. Enter the new location and then click on **Refresh**.

Server	SERVER\MAMUT	
System	System0001	
Document directory	\\NewServer\Mamut\Data\System0001	<input type="button" value="Refresh"/>

You will get an error message if the location is invalid or if the folder is not shared correctly.

8. Remove the old document directory. Make sure that you only remove the folder **System0001**.



The document directory has now been moved.

How to move: Client/Workstation

It is possible to move the program and the database, for example from an old to a new computer or server. Note that the only way to move the database is by using a backup. It is not possible to move the program files of Mamut Business Software; you need to install the program on the new computer. The procedure is dependent on the type of installation.



Note! Make sure that you install the same version of the program on the new computer. If you currently have an older version of Mamut Business Software, we advise you to update the version first.

How to use a new client/workstation:

1. Check the current version of the program via **Help - About**.
2. Go to **Help - About - Manage licence Information - Installed computers** and select **Inactive** beside the computer name that you no longer wish to use and then click **OK**.
3. Install the program files of Mamut Business Software on the new computer. If you still have access to the **Client Installation Set** (which can be created during the server installation), then we advise you to perform the installation from that file.
4. If you have installed the program using the **Installation files** for **Client installation**, then you will directly see the login screen when opening the program. If you have not used this file, then you need to follow the steps below.
5. Select **Connect me to an existing multi-user installation** in the wizard.
6. You can see which database server you connect to by clicking **Select database server**. In this window you can also test if you have access to the server.
7. Click **Next**.
8. Select the database, and click **Next**.
If there are multiple databases on the server, you will receive a list over all of the existing databases.
9. Log in with the user name and password that you have received from your system administrator, and click **OK**.



The procedure is complete and you can now use Mamut Business Software on the new computer.

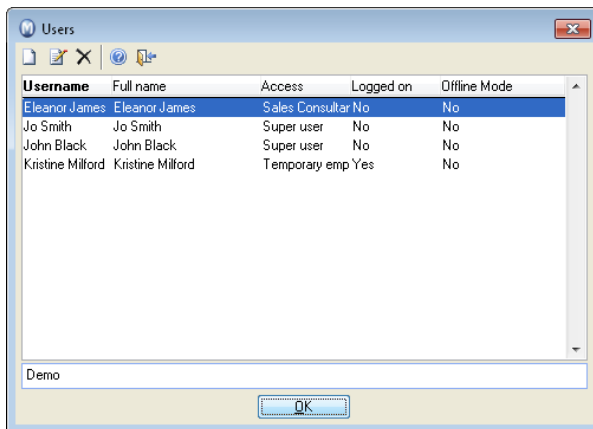
User Administration and Access Rights

User Administration

Everyone that is to use the program needs to be set up as a user. Users need to be created by a user that has been given program access as system administrator, or Super user, under **View - Settings - Security - User Administration**. However, user settings may be changed by the individual users afterwards if their user access rights allow this. This is determined by the access rights the system administrator assigns each user.

The user administration settings can be found under **View - Settings - Security - User Administration**.

In the **Users** window, you can view all registered users with User name, Full name, Access, which users are logged on and who is in disconnected mode.



If you have been assigned Full access/Super user status in your user settings, you can add, edit and delete system users. The same applies if you are set up with the **System administrator** access template. You will have access to all settings for all users, while each individual user will only have access to their own settings.

If you want to create a new user you do this by clicking **New**. Editing the user profile is done by selecting the user you want to make changes to and then clicking **Edit**.

In the User Settings you can link a user to an employee in the Employee Register. When a user is linked to an employee, fields such as "Our ref." will be filled out automatically; when the user is logged on and creates a document. In order to use the web based functionality Mamut Online Desktop, the user must be linked to an employee in the employee register.

Who is an administrator?

The system requires that at least one user is set up with Full access/Super user access. Selecting Full access/Super user is done as a separate choice, but if you want to create a user as system administrator you assign him/her the relevant access template. The difference is that a Super user has access to everything whereas a system administrator is only given access to functions that are naturally part of the work processes of a system administrator. A user whose access profile includes **Full access/Super user** is usually the same person who has the ultimate administrative responsibility within the system.

Security

The SQL Server installed together with Mamut Business Software uses by default SQL Authentication. The system administrator can differentiate the users' database access from the SQL Server.



Tip! System administrator can override this so that Windows authentication is used. In order to do so, you need to install SQL Server Management Studio Express. Disable login for the user <Mamut> or disable all SQL authentication for all programs.

Linking a User to an Employee

In the User profile you can also link the user to an employee in the employee register.

Linking a user to an employee who is not in the employee register

1. Select **View - Settings - Security - User Administration**.
2. Click **New** to create a new user, or select an existing user and click **Edit**.
3. Select **Create new user** and from the drop-down list **Link to employee** select **Create employee**.
4. Click **Save**.



The employee is created in the employee register and connected to the user. You should then ensure the facts are correct on that employee in the employee register.

Linking a user to an employee who is in the employee register

1. Select **View - Settings - Security - User Administration**.
2. Click **New** to create a new user, or select an existing user and click **Edit**.
3. Select the person and in the drop-down list **Link to employee** select **Create employee**.
4. Click **Save**.



The user is connected to the employee in the employee register.

None

(None): Select this if you do not wish to link the user to an employee.

User Access Rights

The User profile needs to be set up by the system administrator or Super user. However, once set up it can be modified by the user if he/she has the user access rights to allow this. You can change your own user settings by going to **View - Settings - User**. The Super user or another user with access to User administration may also change the settings via **View - Settings - Security - User Administration**.

The User Access Rights function within Mamut was developed on the basis that several users are using the same system.

Access Templates

Access templates help the system administrator make sure users only have access to those components of the system they require. It is extremely useful to work with access templates when there are several users spread over different business components using the same system, e.g. sales consultants and logistics staff do not usually require access to Human Resource information or accounting functionality.

Individual users are assigned a previously defined access template in the User Settings.

Manage Access Templates

The functionality that should be available to the different users of the program is registered under **Manage Access Templates**. You can also export the list of access controls to Excel to obtain a detailed overview over the access rights for every individual user.

In help (F1), you can find more information about creating, editing, deleting, and exporting access templates.

User-defined Access Templates

A user-defined access profile defines which functionality an individual user has access to. The access profile is built in the same way as access templates but will not be shown in the list of access templates. In the wizard for access template administration, you can base a user-defined access profile on an access template or an existing access profile.

In help (F1), you can find more information about creating user-defined access templates.

System Log

For an overview on all important events in Mamut, you can export logged system activities into a Microsoft excel file. You do this by selecting **File - Export and System Log**.

When exporting System logs you can select between the following:

- All incidents: Provides an overview on all logged system activities. This report can appear a bit unclear so it can be better to select one of the reports below instead.
- Error messages: Provides an overview of all error messages the system registers. This information is important if you are in contact with support.
- Backup/System: All maintenance incidents of system level type, backup etc.
- Account Updates: All transactions that involve entries into the accounts, such as VAT reports and Year end.
- Report on Functions in use: The report displays company databases, full names on all registered users, language and which user group they belong to, along with other settings that apply to the users.
- Other incidents: All other incidents that are not in any of the above categories, but are still important system wise.


System-created Activities

System-created activities are activities that are created automatically when particular events or processes take place in the program. Some examples of events that trigger the automatic creation of an activity are: Changes to the company database settings, stock count, various wizards that change the values of a selection of contacts, products etc., Period End, change of accounting year, journal entry number series, creation of new accounts in the Chart of Accounts, import of contacts and more.

Complete	Activity no.	Start time	End time	Subject	Type	Status	Resp.
<input checked="" type="checkbox"/>	102	01.03.2010 14:07	01.03.2010 14:07	Changes to Cha	System-created	Completed	admin
<input checked="" type="checkbox"/>	101	01.03.2010 12:04	01.03.2010 12:04	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	100	01.03.2010 12:04	01.03.2010 12:04	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	99	01.03.2010 12:03	01.03.2010 12:03	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	98	01.03.2010 12:01	01.03.2010 12:01	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	107	01.03.2010 11:44	01.03.2010 11:44	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	106	01.03.2010 11:22	01.03.2010 11:22	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	105	01.03.2010 11:02	01.03.2010 11:02	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	104	01.03.2010 10:52	01.03.2010 10:52	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	112	01.03.2010 10:27	01.03.2010 10:27	Accounting year	System-created	Completed	admin
<input checked="" type="checkbox"/>	111	01.03.2010 10:21	01.03.2010 10:21	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	109	01.03.2010 10:15	01.03.2010 10:15	Changes to Cori	System-created	Completed	admin
<input checked="" type="checkbox"/>	110	01.03.2010 08:56	01.03.2010 08:56	Change Values	System-created	Completed	admin


The following changes to account '%c1' have been implemented:
 The VAT code has changed from 'None' to 'Sales Low'
 'Goodwill' : 'Sales'

The **Activity list for system-created activities** shows information on when the various activities were created, which event generated the creation, and which user was responsible for that event.

 At the top of the list you can make selections that allow you to view only activities that have been created during a certain time period or by a certain employee. To update the list content according to your selection, you must click on the **Update** button.

The activities will not be visible within the regular displays, but in a separate activity list for system-created activities. This activity list can be accessed by going to **View - Activity - System-created activities**.

Which events that trigger the automatic creation of activities, are pre-defined in the program and cannot be overridden.

 **Note!** It is not possible to edit or delete system-created activities from the activity list.

Licence

What is a licence?

When you purchase a data program, you buy the right to install and use the software on the number of computers you specified and purchased a licence for.

You will receive a licence number as proof of having paid the licence fee. The licence number acts as a key that 'unlocks' functionality when you register the number within the program.

The licence number controls your access to the software. You can use the program without a licence number, however this will only grant you access to an evaluation version. This kind of version is only available for a limited number of days.

The licence number is used for one or more of the following circumstances

- You are a new Mamut customer and are using the program for the first time.
- You wish to extend the period of the existing Mamut Service Agreement.
- You wish to increase the number of program users.
- You are going to upgrade your version of the program and want additional functionality.

Where do I find the licence number?

As a new customer, you will receive a licence number. If you have purchased the program from a retailer, you will find a letter containing the licence number within the product pack. If you have bought the program directly from Mamut, you will receive an e-mail with your licence number. Should you not have an e-mail address, you will receive a letter with the licence number by post.

How do I register my licence number?

The licence number is registered either by filling in the registration form during the first time startup of the program, or by going to **Help - About - Register Licence number** when in the program.

Downloading licence files

When you renew your licence agreement, upgrade to a more extensive Mamut program, expand your program with additional products, or increase the number of user licences, you are required to download the licence file in order to update your licence information. The new functionality will then become available. Usually, you can update your licence information directly via the Internet by clicking on **Help - About - Licence file**.

Read from licence file

Under certain circumstances you will be asked to read in your licence information from a file you receive from the software supplier, either on a disc or via e-mail. The feature can be found under **Help - About**.

Manage licence information

The functions under **Help - About - Manage Licence Information** provide you with an overview of all your licences for websites, main as well as additional products. You can also adjust which machines the licences apply to, if you are operating with a multi-user installation, how you want to divide the licences for additional products, and which of your websites should be active at any given point.

Users without Internet access

During the registration of your licence number you will be asked whether you have access to the Internet. If you answer 'No' to this question, you will have the option of printing a licence letter, which you will need to send to Mamut by post or fax. Once we have registered your licence letter we will send you a licence disk in the post. You need to import the licence disk content into the program, by going to **Help - About - Licence file**.

Register Licence Number

If you upgrade your software, or expand it with additional products or users, you must register a new licence in the program. The new functions will then become available.

How to register your licence number

1. Select **Help** and **About**.
2. Click **Register Licence number**.
3. Enter the licence number into the field.
Tip! The licence number can be entered using both upper- and lower-case letters. In the licence number, <0> is always a digit, not a letter.
4. Click **OK**.
 The program will connect to the Internet.
5. Click **Yes** when asked whether you are connected.



After your program and Mamut have communicated, the extended functionality will become available.

Additional Products

In order to be able to use additional products, you must register the licence number you receive after you ordered the product. You must also set up which users, or which company database, should have access to the extra features. Once you have done this, the additional product is ready for use.

How to get started with add-on products

1. Go to **Help - Order**, to order add-on products.
2. You will receive your licence for the ordered add-on product. You can start using it as soon as you have registered your licence.



*Some add-on products will also need to be activated for every user. This is done by going to **Help - About - Manage licence information**.*

The About Window

In the **About** window you will find all the information about your licence and the active company database. From this window you can also administer licences for functions, users and websites.

Version: The **Version** of the program you are using will always be relevant when contacting the Mamut Support Centre.

Contact Person: The contact at your end as registered with the software provider.

E-mail: The e-mail address you entered upon registration, and that the software provider uses for e-mail communication with you.

Customer no.: The customer number under which you are registered with the software provider. Include this number when contacting the software provider.

Licenced users: Shows how many machines you may install the program on.

No. of users logged on: This field also acts as a link displaying which users are logged on. This overview is useful when you want to make use of different database utilities - which require all users to be logged off.

Date of expiry: Applies to your licence.

Company databases: The number of company databases you are entitled to as per your licence.

List of Modules: Lists the modules in the program to which you are given access to as per your licence.

List of website functionality: Lists are available for e-commerce functionality to which your licence entitles you.

Manage Licence Information

Here you have a full overview of all your licences for websites, main products, and additional products. You can also define the computers on which your licences will be valid (in multi-user configurations), how the main products are distributed, and which of your websites are to be active.

Choose what you would like to do, using the options on the left-hand side of the window. Read more about the various options, using the links at the bottom of this window.

Additional products

Under **Additional products** you can register which users, and company databases, should have access to any additional products you may have.

Installed computers

Here you have an overview of all computers within the network that are linked to the database. You must have a licence for every computer on which you wish to install Mamut.

If you have used up your **No. of licences** (see below the list), you can deactivate any computers which are not in use, enabling you to release licences.

How to re-allocate your licences

1. Select the check box to the right of the computer you want to deactivate, in the **Inactive** column.
It will now not be possible to open Mamut on this computer.
2. Install Mamut on a new computer.



The new computer will now be linked to the available licence.

Website licences

Here you have an overview of all your websites with the following information:

Website: The working title of the website

Registering: The Internet address at which the website is registered.

Type of website: Specification of the type of licence linked to the website, with the following options:

- No website: No licence linked to the website.
- Website: Website with limited functionality, no cart.
- Pro site: Website with cart.

You cannot register more websites than the number for which you have licences (the number of licences you have is shown in the About window under **List of website functionality**).

This means that you have to deactivate websites that are not in use, before you can register a new website.

How to deactivate a website and register a new site

1. Select the **Company database** in which you created the old website.
Now you have an overview of all the websites that have been created for the company database.
2. Select the website for which you want to remove the licence.
3. Set the status of the website in the drop-down list below to **No website**.
4. Select the **Company database** in which the new website will be created.
If the old and the new website are linked to the same database, you can skip this step.
5. Set the status of the website in the drop-down list below to **Pro site** or **Website**, depending on your licence.
6. Register the new website.



You have successfully deactivated the website, and registered a new one. You may continue editing the new site.

Find out more about editing your website in the "Complete CRM, Sales Management and Web Solutions" introduction manual.

Overview

A window opens containing an overview over:

Main product/Additional product: Displays the name of the product, which is covered by the licence.

No. of licences: Displays how many users have access to the product.

Expires: Displays the last day on which you can use the product. When you extend the Licence Agreement you will be able to Download a new licence file and extend the expiry date.

Licence File

If you have received your licence via e-mail or another medium, you are able to select to read the licence file in the following way:

How to read in a licence file

1. Go to **Help - About**.
2. Click **Licence file**.
3. Browse to the licence file, and select it.
4. Click **OK** to read in the licence file.



Your program is now updated with the new licence information.

Download Licence File

When you renew your Mamut Service Agreement, upgrade to a more extensive Mamut program, expand your program with additional products, or increase the number of user licences, you need to download the licence file in order to update your licence information. The new functionality will then become available.

In general, you can update your licence information directly over the Internet by clicking **Help - About - Download licence file**.

Your licence information will now be synchronised over the Internet with Mamut's licence database. Once synchronisation is complete, you will be informed that your licence is updated and are able to distribute any additional products through the **Manage licence information** function.

How to change your registration information

All contact information, such as **Contact Person** or **Password for Internet support**, can be edited from **Help - About - Register**, and can be sent to Mamut over the Internet.

How to change registration information

1. Select **Help** and **About**.
2. Click **Registration**.
3. Make the changes in all the relevant fields.
4. Click **OK**.
5. Answer **Yes** when asked whether you have access to the Internet.
If you answer **No**, the alterations will be deleted, and the window will be reset to the previous information.



The program connects to the Internet and updates your information.

Chapter 5: Reports

In this chapter:

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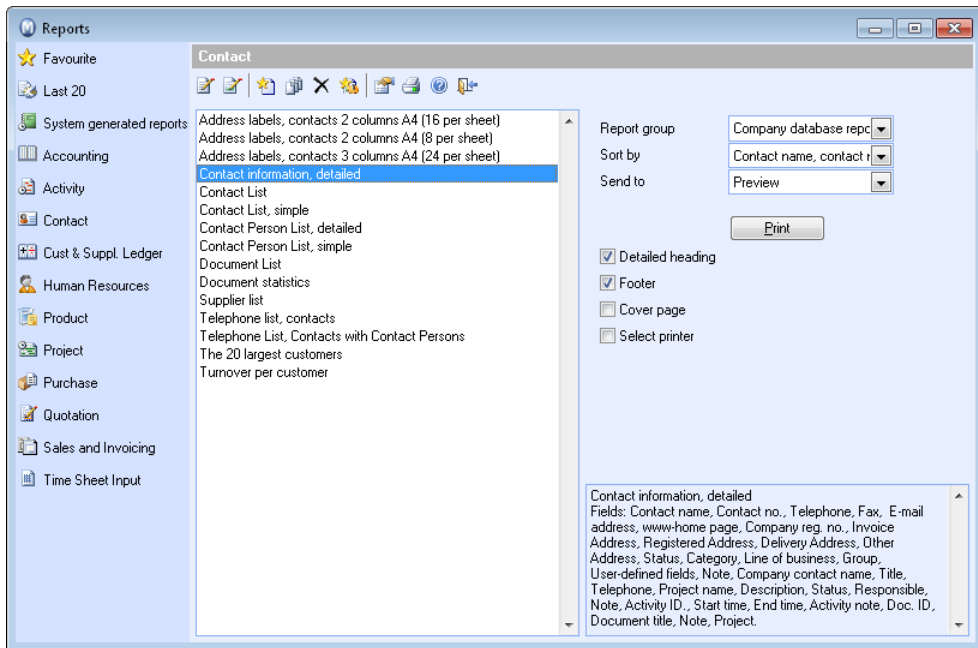
The functionality described in this chapter may be either partly or fully available within your program version. You will find a detailed overview of all of the functionality included in all Mamut products on our website at www.mamut.com/uk/functionality.

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 on sales@mamut.co.uk or by phone on 0207 153 0900.

About the Report Module

In the Report module you will find all reports that you have access to, except reports that can only be printed through particular modules such as purchase orders and invoices. The report module contains many reports and is therefore divided into modules.



Common Reports and Edited Company Database Reports

In the Report module you can select if you want to print from **Common reports** or **Company database reports**.

Common reports are the original reports that are included in the program and are identical for all company databases. These reports cannot be edited and will be updated when updating the program.

Company database reports are copies of the common reports that you can edit in the report/label editor. On a company level, only the report belonging to the active database will be changed.

You can edit reports from the report module by selecting the report you wish to edit and clicking **Edit**. If you want to open the report editor you can click the **Go to report/label editor button**.

When you have edited the report you can select whether you want to print a **Common report** that came with the program or the edited version of the report, which is called a **Company database report**. The edited report can be found in the report group **Company database reports**, with the same name as the common report.

If you have several company databases, the edited company database report will only appear in the database in which you edited the report. You can copy the report to other company databases by using the report/label editor.

You can read more about report editing below.



The user settings allow you to select which of report groups will be the default selection for printing reports. You can read more about the user settings below.

Favourites, Last 20 and System Generated Reports

In addition to the modules there is a selection for **Favourites**, **Last 20** and **System generated reports**. In the **Favourite** tab you can add reports that you print often, either individually, or in report bundles. You can read more about this below. **Last 20** will display the last 20 reports the user has printed for the active company database. Under **System generated reports** you will find important journals that need to be printed directly to the printer for processing.

Access to Reports

If you want to limit the access to reports for some users you can do this through the User access rights. Read more about user access rights in the chapter "Administrator".

Barcodes

In Mamut Business Software, barcodes can be used to represent Product number, Serial number, the Industry's product number or Customer number. Read more about barcodes below.

How to get there

You can open the report module from File - Print. In each module there is a selection for reports, e.g. **View - Contact - Reports**. This screen will start with focus on the relevant reports for the module.


In some screens the print icon will also lead you to a screen where you can open the **Report module**.

Printing a Report

Reports can be printed in different ways. You can for instance, choose to send the report to Printer and E-mail.

You can define a default output in the user settings.

How to print a report

1.  Open the **Report Module**. More information on how to get there can be found above.
2. Select the report you want to print.
3. Select whether the report group is **Company database report** or a **Common report**.
4. Select the type of **Sorting** you want for the report.
5. Select the print medium the report will be printed to under **Send to**.
You can select between Preview, Grid, Printer, File, Fax, HTML, E-mail, PDF or RTF.
6. Click **Print**. Depending on the report you are printing, you will now be able to set a filter for the data to be included within the report.



The report is printed using the selected media.



Note! When you have edited reports, you will be able to choose between printing the **Common Report** included in the system as default, or the edited report, called **Company Database Report**. In the user settings, you can define which report should be pre-selected. The edited report version retains the original report name and can be printed by selecting the Report Group Company Database Reports.

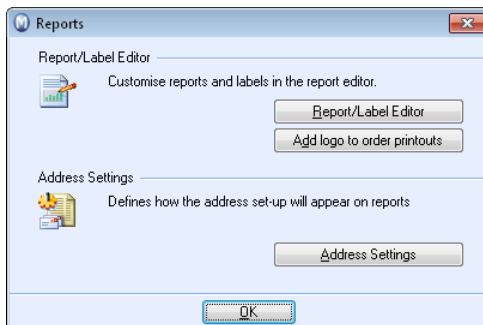
Report Settings

You can access the report settings by going to **View - Settings - Reports**.

Report/Label Editor: From this window you can select and customise reports and labels. You can also add a logo to order printouts, expand, move or delete data fields in the report. The reports are divided by the two tabs **Report** and **Labels**.

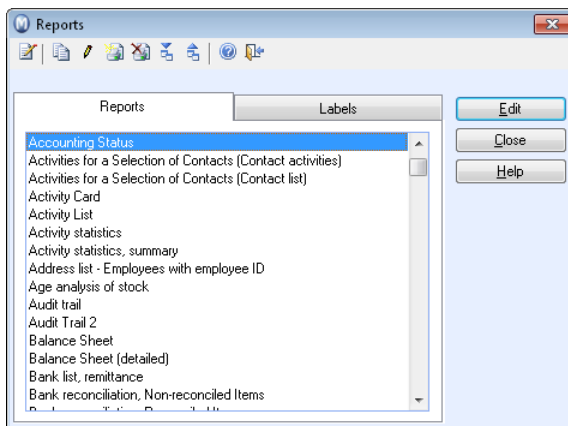
Add logo to order printouts: By launching the wizard, you can insert a logo and remove existing information for a selection of default quotation, order and invoice documents.

Address Settings: This window allows you to define how names and addresses will be displayed on all reports.



Report/Label Editor

You can edit and adapt reports by going to **View - Settings - Reports - Report/Label Editor**. By editing reports you can add the company's logo, and expand, move or delete data fields in the report. The reports are divided into one tab for normal **Reports** and one for **Labels**.



The toolbar

The toolbar gives you additional options for administering reports (place the mouse pointer over each button to find the name used in the description below):



Edit: Double-click on the report or label you wish to edit, or select the line and click **Edit**. The editor then opens with the report you selected. Here you can add or move the company's logo, delete or edit fields.



Copy company database report to all other companies: Copies the changes from the report to all other Company databases.



Edit constants: Opens a list of labels, or field descriptions that can be used in the reports. You can also edit their texts here.



Copy printer settings from Contact list: All reports will now have the same paper size, paper tray and resolution as the settings defined for the Contact list report. You will also be asked whether you want to copy information about the printer driver or printer name. If you do this, it will override the settings for the default printer.



Delete printer settings for selected report: The printer settings for the selected report will be deleted, and will be set to the printer settings for the Windows print driver.



Import report file: Retrieves a new original report from the library area (**Common reports**). This will be useful if something has gone wrong during editing, or if you simply wish to start again.



Export report file: Copies the report files for the relevant report to another directory of your choice - for example, if you want to keep the amended report in another directory/medium (e.g. on network drives).



Note! To be able to print the reports you have edited, you will have to print **Company database reports** and not **Common reports**. You can define which report group should be used as default in the user settings.

Address Settings

In this screen you define the layout of addresses, contact names and contact people who will be displayed on all reports. Please note that you should not enter specific addresses here, as only references are used.

How to change the address layout:

1. Select the **Country** from the list on the left, e.g. United Kingdom.
2. Select the reference (value) you wish to enter from the **Name** drop-down list. Only by first selecting the correct value and then clicking the **Insert** button, the correct value is entered. You can see the results at all times in the example field. You can easily delete fields by selecting the field and pressing **Delete** on your keyboard.
3. Define how the address will be shown. You do this in the **Address** drop-down list.
4. Click **OK** when you have changed the setup.

 *The address layout has now been changed.*

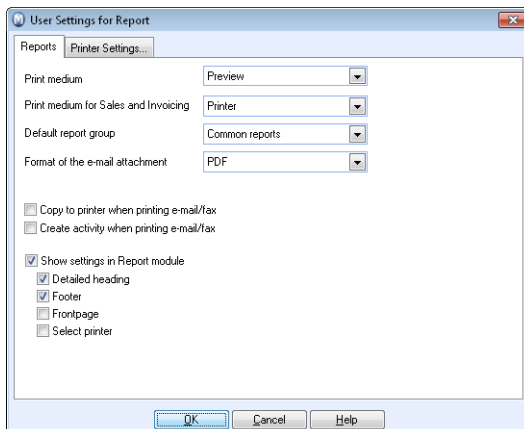
Settings for Reports and Printers



Every user of the system can specify their own print medium and specify default printers for printing various reports. The settings selected apply to the individual user and will follow the user upon login, regardless of the PC.

The user settings for reports can be found via View - Settings - User - Settings per Module - Reports.

The Reports tab



The screenshot shows a dialog box titled "User Settings for Report" with a tab labeled "Reports". Inside the dialog, there are several settings:

- Print medium:** A dropdown menu set to "Preview".
- Print medium for Sales and Invoicing:** A dropdown menu set to "Printer".
- Default report group:** A dropdown menu set to "Common reports".
- Format of the e-mail attachment:** A dropdown menu set to "PDF".
- Copy to printer when printing e-mail/tax:** An unchecked checkbox.
- Create activity when printing e-mail/tax:** An unchecked checkbox.
- Show settings in Report module:** A checked checkbox.
- Detailed heading:** A checked checkbox.
- Footer:** A checked checkbox.
- Frontpage:** An unchecked checkbox.
- Select printer:** An unchecked checkbox.

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Print medium: Select whether the default print medium should be Preview, Printer, Fax or E-mail. The print medium can be overridden in most cases regardless of the choice.

Print medium for sales and invoicing: In addition to Preview, Printer, Fax or E-mail you can select "Transfer from the contact" when printing sales and invoicing reports. If you select "transfer from the contact", the print medium chosen for the contact will be used when printing sales and invoicing reports.

Default report area: Specify which reports are to be used in the Report module. Company database reports (company name) is selected if you have edited one or more reports and want to print these out as printouts. Common reports, is selected if you wish to print out the default reports included with the system.

Format of the E-mail attachment: If you print to E-mail, you can choose between the following formats for the attachment: HTML, PDF or RTF.

Copy to printer when printing E-mail/fax: Mark this if you want a copy on paper as well.

Create activity when printing E-mail/fax: Mark this if you want to create an activity for each E-mail or fax you send.

If you want to display a **Detailed heading**, **Footer**, **Front page** or **Select printer** on printouts, you can mark the selection here. If you want to view and change settings for the report module mark the **Show settings in report module** check box.

The Printer Settings tab

Different reports can easily be sent to different printers: packing lists and pick lists to the warehouse printer, invoice copies to the accountant, invoices to the sales department, while other reports can in turn be printed out for the management.

You can specify the desired printer driver for each of these printouts if you do not wish to use Windows' default printer for printing. The settings selected apply to the individual user and will follow the user upon login, regardless of the PC. If a specific printer is defined for a specific report, this will override the printer defined here.

Levels for printer settings:

There are 3 levels of printer settings in Mamut. In addition to this, in most modules it is possible to select the printer when printing.

First level: If no printer settings are specified, Windows' default printer is used.

Second level: The printer settings selected in the **Printer settings** tab apply to the individual user and override the Windows' default printer.

Third level: The printer settings selected directly for reports via report editing, override other printer settings. This saves detailed settings for name, driver, source, driver settings, etc, in the report itself.

Finally, in most modules in Mamut you can select to choose the printer when printing. When printing you will be able to select which printer is to be used for that precise print job.

How to decide that the default report area is to be Company Database Reports

1. Go to **View** and click on **Settings**. Click on **User**.
2. Select the **Settings per Module** tab.
3. Click **Reports**.
4. Change the default report area to **Company database reports** instead of Common reports.
5. Click **OK**.
6. Confirm that you want to save the changes.



The default report area is now set to Company database reports.

Editing Reports

Getting Started with Report Editing

When editing reports you can add the company's logo and expand, move or delete data fields in the report. You can edit the report by selecting the report in the **Report module** and by clicking **Edit** or you can select **View - Settings - Reports** and **Report/label editor**.

Reports are divided into several areas or fields. These fields can consist of one or more lines, or they can be completely blank. In these fields, frames have been set with codes for different types or groups of information to be included in the report.

You can change the position, size, etc. of these frames. You can also delete the whole frame. If you do this, the information that the frame represented will not be included on the printout.

The screenshot displays the 'Report Editor' window for a report titled 'Contact List: g_001012'. The interface is organized into several sections, each with a set of fields for editing the report content:

- Page Header:** Contains fields for 'Name', 'Telephone', 'Fax', 'E-mail', and 'WWW', each with a corresponding data source or formula (e.g., 'oClient.Fields.name', 'oClient.Fields.Telephone', etc.).
- Group Header 1: contid:** Contains fields for 'Title', 'Telephone', 'Mobile phone', 'Fax', and 'E-mail', with data sources like 'oClient.Fields.Title', 'oClient.Fields.Telephone', etc.
- Detail:** Contains fields for 'Title', 'Telephone', 'Mobile phone', 'Fax', and 'E-mail', with data sources like 'oClient.Fields.Title', 'oClient.Fields.Telephone', etc.
- Group Footer 1: contid:** Contains a field for 'Title' with data source 'oClient.Fields.Title'.
- Page Footer:** Contains a field for 'Title' with data source 'oClient.Fields.Title'.

On the right side, there is a 'Report Cor' panel with icons for report settings and a lock icon.

Title: Title text is only displayed on the first page of the report. The Title field is not included in all reports.

Page Header: This field contains the report page's heading. In this field, you can insert headings for all columns, report name etc. The Page Header is displayed on all pages of the report.

Group Header: Contains the information group's heading, for example contact name and address in a contact report.

Detail: Contains additional information about, for example, a contact (contact person, title and telephone number).

Group Footer: Bottommost line marking the end of the group field. You can insert a line in order to separate the different groups or data calculations in the group.

Page Footer: This is the footer text on each page of the report, for example the page number, print date, etc.

Summary: Total amount, etc. for the entire report. This field is only displayed on the report's last page. The summary field is not included in all reports.



Tip! You can backup (export) your reports so that any changes you may regret are able to be reset. The Report-/label editor has functions for export and import, which make a copy of the report setup. Read more about report -/label editor below.

Inserting a Logo

You can insert your company's logo in report printouts. Read more about this below.

Edit Fields and Labels

You can move, duplicate, expand and delete report fields in order to customise the reports. Read more about this below. Read more about adjusting fields in labels below.

Importing Report Files

If the report you are currently working on has been changed and must be restored, you can use the import feature. Read more about importing report files below.

How to edit a report so the fields are aligned with the form

If your report data appears incorrectly when printing reports onto ready-made forms, you need to edit the report and try again. The reason for the data not appearing correctly on the form may be differences in printers and printer drivers.



Important! You must change the **Report group** to **Company database Reports** in order to print edited reports. Otherwise, the original, unedited report will be printed. Read more about this above.

How to move all fields within a report

1. Go to **View - Settings- Reports - Report/label Editor**.
2. Locate the relevant report.
3. Click **Edit**. The report opens in edit mode.
5. Select the menu **Edit/Select all**. All fields will be highlighted.
Tip! If you only want to move one field, highlight the field by clicking it once.
6. Use the arrow keys on your keyboard to move the fields.
7. Choose **File/Save**.
8. Choose **File/Close**.
9. Print the report again.



Make sure the report has been printed correctly. You may need to edit the report several times.

How to adjust the fields on an invoice

1. Click **View - Settings - Reports**.
2. Click **Report/label Editor**.
3. Locate the relevant report, for instance Interest note - invoice with giro.
4. Click **Edit**. The report opens in edit mode.
5. Place the mouse cursor on the line **Page Footer**.
6. Drag the line upwards or downwards according to your needs. If you move the Page footer upwards, the report fields will be moved downwards and vice versa.
7. Click **File - Save**.
8. Click **File - Close**.
9. Print the report again.



Make sure the report has been printed correctly. You may need to edit the report several times.

Inserting a Logo on Printouts

Before getting started, you must have access to the image file which will be used as the logo. Preferably, the image should not exceed 120 x 70 pixels. If your logo does not conform to the recommended size, you can adjust the size and quality of the image in an image processing program.



Note! The image file is not imported into your Mamut system - the system creates a link to the area where you have saved the image file. It is therefore important that you save the image file saved at a location that is unlikely to be moved.

How to insert a logo in a report

1. Go to **View - Settings - Reports - Report/Label Editor**.
2. Select the report you wish to edit and click **Edit**.
3. The report opens in the Report Designer.
4. You must first decide where you wish to place the logo. You must move, re-scale or delete any fields that are in conflict with the logo field.
5. In the **Report Controls** panel which is displayed in a separate window, click the **Picture/ActiveX Bound Control** button (Image/OLE).
6. The feature for inserting images is now activated. When you move the mouse cursor over the report, you will notice that the cursor changes from an arrow to a plus sign.
7. Select the report area where you wish to insert the logo. Press the left mouse button and keep it pressed down before dragging the cursor over the area where you want to insert the image.
8. The **Report Picture** window is displayed. In the **File** field, enter the file path to the image file, either by entering the path or by clicking the search button and navigating to the file manually.
9. When you have chosen the logo, you can continue by defining the how the logo will be displayed in relation to the selected area:

Clip Picture: The image/logo is displayed in its original size. If the image is larger than the frame, the image will be clipped.

Scale picture, retain shape: Scales the image/logo to fill the frame without changing the width/height ratio.

Scale picture, fill the frame: Scales the image/logo to fill the frame without retaining the width/height ratio.

10. Click **OK** in order to insert the image in the report/invoice. You can still select and move the logo by clicking and dragging the image or by using the arrow keys on your keyboard.
11. Save the changes by clicking **File - Save**. Close the window.



The logo will be displayed on the report the next time it is printed.



Note! Remember to select **Company database** reports instead of **Common reports** in order to print the customised report.

You can also add a logo to all order printouts simultaneously by running the wizard **Add logo to all order printouts** which you can find by clicking **View - Settings - Reports**. The logo will then be added automatically to the reports of your choice.



Note! You cannot undo the wizard **Add logo to all order printouts**. You must edit each report in which there is a space conflict etc. It is recommended to create a backup before completing the wizard.

If the edited report does not meet your standards, you can easily restore the original report file. Read more about this below.

Editing Labels

There are a number of different labels you can use for addresses, products or telephone lists. You can use the settings for labels to adjust the height, width and spacing, so that the printouts fit the labels.

How to adjust the label position

1. Select the label report which is to be altered.
2. Click **Edit**. The label editor then opens.
3. Click and hold on the frame, for instance Page Header or Page Footer.
4. Drag the frame to the position in which you want it.
5. Click **OK**.



The label position has now been adjusted.

How to adjust the label height

1. Select the label report which is to be altered.
2. Click **Edit**. The label editor then opens.
3. Double-click on **Detail** and open the **General** tab.
4. Measure the exact height of one of the labels you are going to print. The measurements of the labels can usually be found on the packaging, or you can use a ruler.
5. Enter the number of centimetres in the **Height** field.
6. Click **OK**.



The label height has now been adjusted.

How to adjust the label width

1. Select the label which is to be altered.
2. Click **Edit**. The label editor then opens.
3. Click **File** and select **Page setup** from the menu. The **Page setup** window then opens.
4. If the label sheet contains more than one column, enter the number of columns in the **Number** field.
5. Measure the exact width of one of the labels you are going to print. The measurements of the labels can usually be found on the packaging, or you can use a ruler.
6. Enter the number of centimetres in the **Width** field.
7. If there is spacing between the labels you are going to print, measure this.
8. Enter the measurement in the **Spacing** field.
9. If there is one, measure the left margin of the sheet on which you are going to print the labels.
10. Enter this measurement in the **Left margin** field.
11. Click **OK**.



The label width has now been adjusted.



Note! When printing labels, you must select the report group **Company database reports**.

How to Import Report Files

Sometimes it is necessary to restore the original report files, for instance, if you want to re-edit the original version of a report, or if the report file has been damaged. Other scenarios where this feature may be useful is when a report has been updated with new data or when new regulations have been introduced which affect the layout of the report.

How to import report files

1. Go to **View - Settings - Reports**.
2. Click the **Report/Label Editor** button.
3. Highlight the report which you want to re-import.
4. Click the **Import Report File** button.
5. Click **Import**.
6. Click **OK** when the import has been confirmed.
7. Click **Close**.



The imported report files can now be printed.

Favourites

Favourite Reports

The reports that you print most frequently can be set up as favourite reports. This can be done by defining a fixed selection for the report and giving it a report name and description.

It is then easy to print out the report directly from the **Favourite** tab in the Reports module. The reports can also be grouped together as a report bundle to allow more efficient printing of multiple reports or to enhance the overview in the window.

Printing a favourite report

1. Select the **Favourite** tab.
2. Select the report you wish to print.
You can also select one of the reports from a report bundle.
3. Click **Print**.



The report is then printed, with the fixed selection saved with the favourite report, if applicable.

Printing a report bundle

1. Select the **Favourite** tab.
2. Select the report bundle you wish to print.
3. Click **Print**.



All the reports in the bundle are printed, each one with any fixed selection saved with it.

Settings for Favourite Reports

Before you complete settings for a favourite report you have to define the report as a favourite. You can then select the report and click **Settings**.


Creating a favourite report

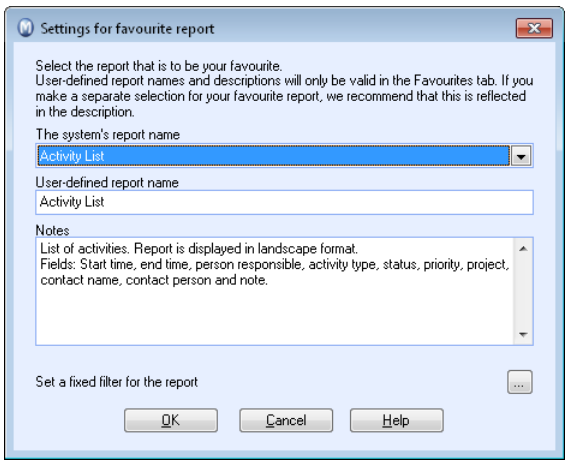
Method 1

- 1. Open the report module and select the report you want added as a favourite.
- 2. Right-click the report.
- 3. Select **Add as favourite report**.

 *The report is now available under Favourites in the Report Module.*

Method 2


- 1.  Open the report module and click **Favourite**.
- 2. Click **New Favourite report**.



- 3. Select the report you want added.

 *The report is now available under Favourites in the Report Module.*

Settings for favourite reports

 Select **Favourite** on the report menu on the left hand side and select the report you want to change settings for in the list. You can then click on the **Settings for Favourite** button in the toolbar. The settings window provides you with the following options:

The system's report name: Select the report you wish to add, if you have not already done so. Please note that any fixed selection will be deleted if you change the report.

User-defined report name: Enter your own name for the report as it will appear as Favourite report. If you make a fixed selection, you can reflect this in the name.

Notes: Change or add additional information about the report. These notes will be displayed in the **Description** field below **Favourite**.


Apply fixed selection to the report: If you want to apply a fixed selection for the report when you print it out from the **Favourite**, you can define it here. You can still adjust the selection each time you print them out.

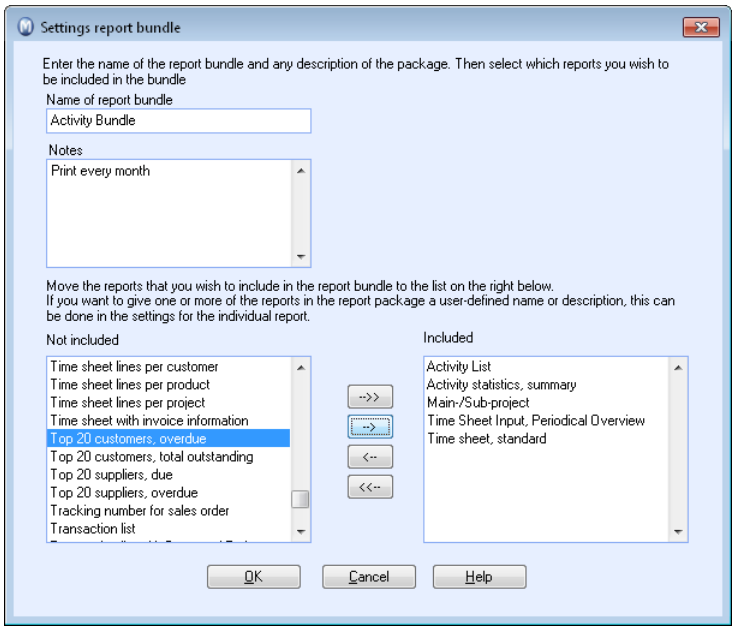
Include in Report bundle: Only applies to favourite reports that are created in connection with a Report Bundle. The field cannot be changed.

Settings for Report Bundles

Before you complete settings for a report bundle you have to create a report bundle. You then click on the **Settings** button and make necessary changes and settings.

Creating a report bundle

- 1. Click the **Favourite** button.
- 2.  Click **New report bundle**.
The **Report bundle settings** window now opens.



- 3. Enter a descriptive **Name of report bundle**.
- 4. Give any additional information about the report bundle in the **Notes** field.
This note will be displayed in the **Description** field when you select the report bundle below the **Favourite** tab.
- 5. Move the reports you wish to include in the bundle from the **Not included** window to the **Included** window.
You do this by double-clicking the reports in the left-hand list or by selecting them and clicking on the arrows between the two fields.
- 6. Click **OK**.

  *The report bundle is added below the Favourite tab with the list of reports it contains.*

You can edit the reports in the bundle individually if you wish.

Barcodes

Barcodes are mainly used to make product handling easier for trading companies. Some businesses use barcodes to simplify the registration of product numbers while others assign a barcode to every single delivery (parcel). Some products, which are unique in their unit for serial number, production number or similar, sometimes also have barcodes. Certain businesses also use barcodes to handle their despatches to customers.

Barcode fonts

Bar codes are merely another way of presenting information other than ordinary text and numbers. In practice, every letter and number is being replaced with a line /bar, so one might look at a barcode as a kind of font. Bar code fonts are used to convert text and numbers, e.g. product or parcel numbers, into a barcode. A barcode reader is then used to read the barcode, and then turn it back into text/numbers.

There are many different barcode fonts and generally the newest fonts offer the greatest flexibility and functionality. Older barcodes only support numbers as a basis for barcode conversion.

EAN 13 is one of the most commonly used barcodes on products. For more information on barcodes you can consult the Internet, e.g.

<http://www.barcodingfonts.com/barcode.htm>.



Example of an EAN 13 barcode font

Many printer manufacturers sell barcode fonts as well. A number of printers also include barcode fonts in the software that comes with them. You can also purchase barcode fonts on the Internet.

Barcode readers

Most barcode readers connect to the keyboard port of a personal computer. The barcode readers translate the barcode, which is being input as text/numbers in the same way as if it had been entered by the user with a keyboard.

Printouts

To be able to print out barcode labels you need a label printer. You can select the type you need based on your requirements regarding label quality, label size etc.

Barcodes in Mamut Business Software

In Mamut Business Software, barcodes can be used to represent the Product number and Serial number along with the industry's product number or Customer number.

Product number

If you would like to use a barcode to represent the product number in Mamut, the first thing you have to do is to ensure that the textual content of the barcode is entered either into the product number field or the EAN code field (under the Miscellaneous tab in the Product card). After that the labels will show the product number as a barcode. If the EAN number should show on the label instead, you will need to change the label layout so that it contains the EAN code instead of the product number.

If you would like to have the barcode displayed on the pick list, you will need to make the necessary changes to the pick list template.

When registering sales, Receive/Return, stock counts etc, you can use a barcode reader instead of manually registering the products via the keyboard.

Serial number

It is possible to use the barcode reader instead of the keyboard for entering the serial number in the registration windows for incoming and outgoing products. Any serial number labels need to be created individually and are best printed from Microsoft Word or other text editors.

Customer number

The customer number can be presented as a barcode on internal printouts such as pick lists, order verifications etc. You can also select to use barcodes on letters, direct marketing documents and other material you send out. The use of barcodes on internal documents can help to simplify the process of finding a customer in the system based on paper printouts. The handling of returned mail, too, can be simplified by using barcodes on external documents you send to your customers.

Chapter 6:

More Information

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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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Mamut Alliance Partners



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

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A company in

