😹 IES Client(Q) v8.24 : My II				
Help Submit Quit Functions Co	ommands			
? Q	v ()	« » 11	_	* 🗸 X
	· · ·			
	a contrat			
<u>1</u> Main <u>2</u> Settings	3 Contact Detail 4 Notes			
Account Key	01202		2: Currency Management	
AR / Debtor Account	01202	Managed Currency	LOCAL R	
Туре	d debtor	Financials: -		
	1: Main Settings	Current Month	0.00	Date Drill
*Co Name / Cust Name	ARS TECHNICAL IMAGES	Balance YTD	10 10 10 10 10 10 10 10 10 10 10 10 10 1	Receipts and Credits
First / Given Names		A Physicals: -		Invoices
		Qty Current	0.00	Matching
		Qty Ytd	0.00	Statement
	<	Sales: -		CRM Connect
		Sales Current	0.00	CRM Other
Cheque Beneficiary	ARS TECHNICAL IMAGES	Sales YTD	0.00	
Client Ref		Ageing: -		
CRM Number	00069	Current	0.00	
Contact Master	3430	30+	0.00	
	Synchronize With Crm ?	60+	6,675.69	
		90+	0.00	
Last Upd By		120+	0.00	
Last Upd		Unallocated Receipts	-5,307.79	
Sec				1
6				
E				
				-

Slide notes: We will now use the example of a Customer Record screen to discuss a few basic principles that apply when working with screen forms.

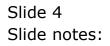
IES Client(Q) v8.24 : My IE Help Submit Quit Functions Co				
• 9 Q	Ŷ			4) Ø (X)
1 Main 2 Settings	3 Contact Detail 4 Notes			
		/ DEBTOR MASTER		
Account Key	01202		2: Currency Management	
AR / Debtor Account			LOCAL R	
		Financials: -		
	1: Main Settings	Current Month	0.00	Date Drill
*Co Name / Cust Name			1,367.90	Receipts and Credits
First / Given Names		IES Client 🔀 🔤 YID		Invoices
	4	Record in look-only mode! Current	0.00	Matching
	4	Gty Ytd	0.00	Statement
	<	ОК		CRM Connect
		sales Current	0.00	CRM Other
Cheque Beneficiary	ARS TECHNICAL IMAGES	Sales YTD	0.00	
Client Ref		Ageing: -		
CRM Number		Current	0.00	
Contact Master		30+	0.00	
	Synchronize With Crm ?	60+	6,675.69	
		90+	0.00	
Last Upd By		120+	0.00	
Last Upd		Unallocated Receipts	-5,307.79	
Set.				

Slide notes: In the current example, we are using an Enquiry screen, which means that we cannot make changes and save the data. If we attempt to save, the system tells us that we are in 'look only' mode.

- ? Q	•	0 « » it		* 0
<u>1</u> Main <u>2</u> Settings	3 Contact Detail <u>4</u> Notes			
	AR RECEIVABLE	/ DEBTOR MASTER	·	
Account Key	01202		2: Currency Management	
AR / Debtor Account	d debtor	Managed Current Financials: -	DUCAL R	
Туре	1: Main Settings	Financiais: - Current Mon	0,00	Date D
*Co Name / Cust Name		Balance Y1		Receipts and Cred
First / Given Names		Physicals: -		Invoic
		Gty Curre	et 0.00	Matchi
		Gty Y		Stateme
	<	Sales: -		CRM Conne
		Sales Curre	et 0.00	CRM Oth
Cheque Beneficiary	ARS TECHNICAL IMAGES	Sales Y1	D 0.00	
Client Ref		Ageing: -		
	00069	Curre	nt 0.00	
CRM Number			0.00	
	3430	30	14	
CRM Number	3430 Synchronize With Crm ?	30		
CRM Number			0+ 6,675.69	_
CRM Number		60	6,675.69 0+ 0.00	

Slide notes: On this type of screen, with existing data, we can generally click anywhere on the screen, as the sequence of data fields is quite irrelevant. Generally, we move from one field to another by pressing ENTER or TAB, or we can just click anywhere.

			MASTER		
Account Key	01202			2: Currency Management	
AR / Debtor Account	01202		Managed Currency	LOCAL R	
	d debtor		Financials: -		
	1: Main Settings		Current Month	and the second se	Date Dr
*Co Name / Cust Name	ARS TECHNICAL IMAGES		Balance YTD	1,367.90	Receipts and Credit
First / Given Names		~	Physicals: -		Invoice
			Qty Current	10 C C C C C C C C C C C C C C C C C C C	Matchin
		~	Gty Ytd	0.00	<u>Statemer</u>
	<	>	Sales: -	0.00	CRM Conner CRM Othe
	ARS TECHNICAL IMAGES		Sales Current		
	ARS IECHNICAE INAGES		Sales YTD	0.00	
Client Ref CRM Number	00069		Ageing: -	0.00	
	3430	-	Current 30+	0.00	
	Synchronize With Crm ?		30+	6,675.69	
			90+	0.00	
Last Upd By			120+	0.00	-
			Unallocated Receipts	-5,307.79	
Last Upd					



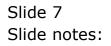
- 9 Q	V (D ((» 1T		45 🔗
1 Main 2 Settings	3 Contact Detail 4 Notes				
	AR RECEIVABLE / D	EBTO	R MASTER		
Account Key	01202			2: Currency Management	
AR / Debtor Account	01202		Managed Currency	LOCAL R	
Туре			Financials: -		
	1: Main Settings ARS TECHNICAL IMAGES		Current Month		Date Dri
	ARS TECHNICAL IMAGES		Balance YTD	1,367.90	Receipts and Credits
First / Given Names		-	Physicals: -	0.00	Invoices Matching
			Qty Current	0.00	
		~	Gty Vtd	0.00	Statemen CRM Connec
	<u>K</u>	>	Sales: -	0.00	CRM Connec CRM Othe
	ARS TECHNICAL IMAGES		Sales Current	0.00	<u>CRW Othe</u>
Chiedrie Denemeral A	ARS TECHNICAL TRAGES		Sales YTD	0.00	
Client Ref	00069		Ageing: -	0.00	
CRM Number	3430		Current	0.00	
Contact Master	Synchronize With Crm ?		30+ 60+	6,675.69	-
				0.00	
Last Upd By			90+	0.00	-
Last Upd By Last Upd			120+ Unallocated Receipts	-5,307.79	-
Last upd			Unallocated Receipts		

Slide notes: If the screen form has tabs at the top, then it means that we have a multi screen form, and we can click any tab to visit different parts of the screen.

IES Client(Q) v8.24 : My IES Help Submit Quit Functions Con				
• ? Q	• () «	» IT 🔲	\$	 ×
<u>1</u> Main 2 Settings	3 Contact 4 Notes			
			·	
	3: Internal Management		4: Internal Issues and Retail	
Transaction Status Control Acct	10-00-00-35 DEBTORS CONTROL (1) : TRADE	Profit Fin Limit (in Local Currency!)	def Default - no markup 1,000.00	
Open Item Management	Extended Open Item	Credit Status	Normal	-
Tax: Tax Reg Number	Tax Exempt Customer ?		Disallow Retail Charges	
Tax Number Date	def Standard	Retail Direct Discount % Formula Indicator	0.00	
Category Group	td Trade AR Debtors	Retail Terms Rate Book		
Security No				
See				
E				

Slide 6 Slide notes:

	3 Contact					
<u>1</u> Main <u>2</u> Settings	Detail <u>4</u> Notes					
			R MASTEF			
Account Key	01202			2:	: Currency Management	
AR / Debtor Account	01202		Managed Curr	ency L	OCAL R	
Туре			Financials: -			
	1: Main Settings		Current N		0.00	Date Dri
	ARS TECHNICAL IMAGES		Balance	YTD	1,367.90	Receipts and Credit
First / Given Names		^	Physicals: -			Invoices
			Qty Cu		0.00	Matching
		~		y Ytd	0.00	Statemen CRM Connec
	<u>×</u>	>	Sales: -	11	0.00	CRM Othe
	ARS TECHNICAL IMAGES		Sales Cu Sales		0.00	
Cheque Beneticiary Client Ref			Ageing: -	YID	0100.	
CRM Number	00069			rrent	0.00	
Contact Master	3430	_		30+	0.00	-
	Synchronize With Crm ?			60+	6,675.69	-
				90+	0.00	-
Last Upd By				120+	0.00	
Last Upd			Unallocated Rec	eipts	-5,307.79	-
Last opa				0.010		



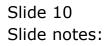
ES Client(Q) v8.24 : My IE Help Submit Quit Functions Co	ommands	» 11		
1 Main 2 Settings	3 Contact Detail 4 Notes			
		R MASTER	·	<u>Save</u>
Account Key AR / Debtor Account	01202	Managed Currency	2: Currency Management LOCAL R	Contact Manage
Туре	1: Main Settings	Financials: - Current Month		CRM Connect CRM Other
*Co Name / Cust Name First / Given Names	ARS TECHNICAL IMAGES	Balance YTD Physicals: -		Date Event Drill Receipts and Credits Invoices
	×	Gty Current Gty Ytd Sales: -		Matching Statement(s)
Cheque Beneficiary	ARS TECHNICAL IMAGES	Sales Current Sales YTD		Delete Account
Client Ref	00069	Ageing: -	0,00	
CRM Number Contact Master	3430	Current 30+		-
	Vith Crm ?	60+		
		90+		-
Last Upd By Last Upd		120+ Unallocated Receipts		-
Set E				

Slide notes: Next, we move to an update type of screen. That means that we can make changes and save the data. If it is an existing data record, then we can also click or move to different fields in any order, perform any listed functions, etc.

? Q	٣	Ø «	≫ i⊺		4) (V)	-
1 Main 2 Settings	3 Contact Detail <u>4</u> Notes					
	AR RECEIVABL	E / DEBTO	R MASTER	<u>.</u>	₽ <u>8</u>	ave
Account Key	01202			2: Currency Management		
AR / Debtor Account	01202 d debtor		Managed Currency	LOCAL R	Contact Mana CRM Conr	
Туре			Financials: -	0.00	CRM Of	_
*Co Name / Cust Name	1: Main Settings ARS TECHNICAL IMAGES		Current Month Balance YTD	and the second se	Date Event [
First / Given Names		~	Physicals: -		Receipts and Cree	_
First / Given Hames			Gty Current	0.00	Invoi	
			Qty Ytd	0.00170.001	Match	
	<	×	Sales: -		Statemen	nt(s'
		<u></u>	Sales Current	0.00	Delete Acco	bun
Cheque Beneficiary	ARS TECHNICAL IMAGES		Sales YTD	0.00		
Client Ref			Ageing: -			
CRM Number	00069		Current	0.00		
Contact Master	3430		30+	0.00		
	Synchronize With Crm ?		60+	6,675.69		
			90+	0.00		
Last Upd By		_	120+	0.00		
Last Upd		_	Unallocated Receipts	-5,307.79		

Slide notes: Fields that are not accessible for typing will usually be dimmed.

R RECEIVABL	.E / DEBTOR			Save
		MASTER		Save
			••••	
1202			2: Currency Management	
1202			LOCAL R	Contact Manage
debtor				CRM Connec
Main Settings		Current Month	0.00	CRM Othe
RS TECHNICAL IMAGES		Balance YTD	1,367.90	Date Event Dri
	~	Physicals: -		Receipts and Credit
		Gty Current	0.00	Invoice
	100	Gty Ytd	0.00	Matchini
	5	Sales: -		Statement(s
		Sales Current	0.00	Delete Account
RS TECHNICAL IMAGES		Sales YTD	0.00	
		Ageing: -		
		Current	0.00	
130		30+		
Synchronize With Crm ?		60+		
		90+		_
		120+		
		Unallocated Receipts	-5,307.79	
	202 debtor Main Settings S TECHNICAL IMAGES S TECHNICAL IMAGES	Adebtor Main Settings IS TECHNICAL IMAGES AS TECHNICAL IMAGES AS TECHNICAL IMAGES AS TECHNICAL IMAGES	1202 Managed Currency debtox Financials: - Main Settings Current Month Its TECHNICAL IMAGES Physicals: - Its TECHNICAL IMAGES City Current Its TECHNICAL IMAGES Sales: - Its TECHNICAL IMAGES Sales: - Its TECHNICAL IMAGES Sales: - Its TECHNICAL IMAGES Current Its TECHNICAL IMAGES Sales: - Its TECHNICAL IMAGES - Its TECHNICAL IMAGES -	L202 Managed Current (Current Month) LOCAL R debtor Financials:- Urrent Month 0.00 St ECENTICAL INAGES Balance District Month 0.00 St ECENTICAL INAGES Physicals: - Ody Current Month 0.00 St ECENTICAL INAGES Sales: - Sales: VTD 0.00 St ECENTICAL INAGES Sales: VTD 0.00 Synchronize With Crm ? Gebing: - Gebing: -



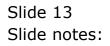
	S Client(Q) v8.24 : My IE Submit Quit Functions Co					
•	? Q) () ((>> 1⊺		🔅 🖉 😣
	1 Main 2 Settings	3 Contact Detail 4 Notes				
				R MASTER		Save
	Account Key	next			2: Currency Management	
	ACCOUNT Key AR / Debtor Account			Managed Currency	LOCAL R	Contact Manage
		d debtor		Financials: -		CRM Connect
		1: Main Settings		Current Month	0.00	CRM Other
	*Co Name / Cust Name			Balance YTD		Date Event Drill
	First / Given Names		~	Physicals: -		Receipts and Credits
				Qty Current	0.00	Invoices
				Qty Ytd	0.00	Matching
		<	5	Sales: -		Statement(s)
				Sales Current	0.00	Delete Account
	Cheque Beneficiary			Sales YTD	0.00	
	Client Ref			Ageing: -		
	CRM Number			Current	0.00	
	CULLACT MASTER	1534653633		30+	0.00	
		Synchronize With Crm ?		60+	0.00	
				90+	0.00	
	Last Upd By			120+	0.00	
	Last Upd			Unallocated Receipts	0.00	
Ser E						

Slide notes: And then, we use an example of an update screen where we capture a new data record. In this case, we still move from one field to the next by pressing ENTER or TAB, but in this case the sequence or order of the fields may be important and may be forced by the system.

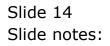
	E <mark>S Client(Q) v8.24 : My l</mark> E Submit Quit Functions Co					
•	- ? Q		Ø (» it		 * • •
	1 Main 2 Settings	3 Contact Detail <u>4</u> Notes				
				R MASTER	ا	Save
	Account Key	D00031			2: Currency Management	
	AR / Debtor Account	D00031		Managed Currency	LOCAL R	Contact Manage
	Туре			Financials: -		CRM Connect
		1: Main Settings		Current Month	0.00	CRM Other
	*Co Name / Cust Name			Balance YTD	0.00	Date Event Drill
	First / Given Names		~	Physicals: -		Receipts and Credits
				Gty Current	0.00	Invoices
				Qty Ytd	0.00	Matching
		<	3	Sales: -		Statement(s)
				Sales Current	0.00	Delete Account
	Cheque Beneficiary			Sales YTD	0.00	
	Client Ref			Ageing: -		
	CRM Number			Current	0.00	
	Contact Master	D00031		30+	0.00	
		🔽 Synchronize With Crm ?		60+	0.00	
				90+	0.00	
	Last Upd By			120+	0.00	
	Last Upd			Unallocated Receipts	0.00	
Ser E]

Slide notes: For example, if we try to click the "Client Ref" field before we have done the "Customer Name" field, then there is a light beep, and the cursor moves back to the "Customer Name" field. This means that the system expects that field to be done first, before we can move further.

1 Main 2 Settings	3 Contact Detail 4 Notes			
	AR RECEIVABI	LE / DEBTOR MASTER		Sav
Account Key	D00031		2: Currency Management	
	D00031	Managed Currency	LOCAL R	Contact Manage
	d debtor	Financials: -		CRM Connec
	1: Main Settings	Current Month	0.00	CRM Othe
*Co Name / Cust Name		Balance YTD	0.00	Date Event Dri
First / Given Names		Physicals: -		Receipts and Credits
		Gty Current	0.00	Invoice
		Gty Ytd	0.00	Matchini
	<	Sales: -		Statement(s
		Sales Current	0.00	Delete Account
Cheque Beneficiary		Sales YTD	0.00	
Client Ref		Ageing: -		
CRM Number		Current	0.00	
Contact Master	D00031	30+	0.00	
	Synchronize With Crm ?	60+	0.00	
		90+	0.00	
Last Upd By		120+	0.00	
Last Upd		Unallocated Receipts	0.00	



	3 Contact			
1 Main 2 Settings	Detail <u>4</u> Notes			
	AR RECEIVAB	LE / DEBTOR MASTER		Sav
				-
Account Key	D00031		2: Currency Management	
	D00031		LOCAL R	Contact Manag
	d debtor	Financials: -		CRM Connec
	1: Main Settings	Current Month	0.00	CRM Othe
*Co Name / Cust Name		Balance YTD	0.00	Date Event Dri
First / Given Names		Physicals: -		Receipts and Credit
		Gity Current	0.00	Invoice
		Qty Ytd	0.00	Matchin
	<	Sales: -		Statement(s
		Sales Current	0.00	Delete Accour
Cheque Beneficiary		Sales YTD	0.00	
Client Ref		Ageing: -		
CRM Number		Current	0.00	
Contact Master	D00031	30+	0.00	
	Synchronize With Crm ?	60+	0.00	
		90+	0.00	
Last Upd By		120+	0.00	
Last Upd		Unallocated Receipts	0.00	



IES Client(Q) v8.24 : My IES Help Submit Quit Functions Commands				
e () Q	» ۷ «	» îT	-	\$\$ \$\$ \$
1 Main 2 Settings 2 Contact Detail	4 Notes		_	
AR R		R MASTER		Save
Account Key D00031			2: Currency Management	
AR / Debtor Account D00031		Managed Currency	LOCAL R	Contact Manage
_{Type} d debtor		Financials: -		CRM Connect
1: Main S		Current Month		CRM Other
*Co Name / Cust Name New Custo		Balance YTD	0.00	Date Event Drill
First / Given Names	<u>~</u>	Physicals: -		Receipts and Credits
		Gty Current	100 Y 100 Y	Invoices
	~	Qty Ytd	0.00	Matching
 	X	Sales: -		Statement(s)
		Sales Current		Delete Account
Cheque Beneficiary New Custo	omer	Sales YTD	0.00	
Client Ref		Ageing: -	0.00	
CRM Number		Current		
Contact Master D00031	onize With Crm ?	30+	0.00	
I ∨ Synchroi	nize With Crm ?	60+	0.00	
		90+	0.00	
Last Upd By		120+		
Last Upd		Unallocated Receipts	0.00	
Ses				
f				

Slide notes: A multi-line Text Field will not move the cursor to the next field when we press ENTER, and will give a new line within the multi-line text field instead. In this case, we have to press TAB or click the next field to move along.

IES Client(Q) v8.24 : My IE					
Help Submit Quit Functions Co	ommands		: 0.00-0 (51///G-		
(?) Q,		<i>(</i>) <i>(</i>	>> iT		(\$) (\$) (\$)
1 Main 2 Settings	3 Contact 4 Notes				
			R MASTER	چ الج	B Save
					àò
Account Key				2: Currency Management	
ART DONIOL MOCOUNT	D00031		Managed Currency	LOCAL R	Contact Manage
Туре	d debtor		Financials: -	0,00	CRM Connect CRM Other
*Co Name / Cust Name	1: Main Settings		Current Month	0.00	Date Event Drill
*Co Name / Cust Name First / Given Names	New Cuscomer	~	Balance YTD Physicals: -	0100	Receipts and Credits
First / Given Names			Gty Current	0.00	Invoices
			Gity Current Oty Ytd	0.00	Matching
		×	Sales: -		Statement(s)
			Sales Current	0.00	Delete Account
Cheque Beneficiary	New Customer		Sales YTD	0.00	
Client Ref			Ageing: -		
CRM Number			Current	0.00	
SOUTEDED MUSED	D00031		30+	0.00	
	Synchronize With Crm ?		60+	0.00	
			90+	0.00	
Last Upd By			120+	0.00	
Last Upd			Unallocated Receipts	0.00	
Ses					
E					

Slide notes: Other than that, it is quite simple and intuitive to use the screen forms. An update screen will often have a specific SAVE or UPDATE function, but even if it is absent, we can always use the save icon at the top.

Help Submit Quit Functions C					
e ? Q	×.) () ((» iT		4 🖉 🕅
1 Main 2 Settings	<u>3</u> Contact Detail <u>4</u> Notes				
			R MASTER	ء 速	Save
Account Key	D00031			2: Currency Management	
AR / Debtor Account	D00031		Managed Currency	LOCAL R	Contact Manage
Туре	d debtor		Financials: -		CRM Connect
	1: Main Settings		Current Month	0.00	CRM Other
*Co Name / Cust Name	New Customer		Balance YTD	0.00	Date Event Drill
First / Given Names		~	Physicals: -		Receipts and Credits
			Gty Current	0.00	Invoices
			Qty Ytd	0.00	Matching
	<	(N)	Sales: -		Statement(s)
			Sales Current	0.00	Delete Account
Cheque Beneficiary	New Customer		Sales YTD	0.00	
Client Ref			Ageing: -		
CRM Number			Current	0.00	
Contact Master	D00031		30+	0.00	
	Vith Crm ?		60+	0.00	
			90+	0.00	
Last Upd By			120+	0.00	
Last Upd			Unallocated Receipts	0.00	
P200					
Sec					
É					

Slide notes: Of course, if the record is still incomplete and demands further fields to be filled in, then the system will beep and refuse to save the record until the required fields have been satisfied.

1 Main 2 Settings	3 Contact Detail 4 Notes			
	AR RECEIVABI	E / DEBTOR MASTER		Saw
Account Key	D00031		2: Currency Management	
AR / Debtor Account	D00031	Managed Currency		Contact Manage
Type	d debtor	Financials: -		CRM Connec
	1: Main Settings	Current Month	0.00	CRM Othe
*Co Name / Cust Name	New Customer	Balance YTD	0.00	Date Event Dri
First / Given Names		Physicals: -		Receipts and Credit
		Gty Current	8.00	Invoice
		Qty Ytd	0.00	Matchini
	1	Sales: -		Statement(s
		Sales Current	0.00	Delete Account
Cheque Beneficiary	New Customer	Sales YTD	0.00	
Client Ref		Ageing: -		
CRM Number		Current	0.00	
Contact Master	D00031	30+	0.00	
	Vith Crm ?	60+	0.00	
		90+	0.00	
Last Upd By		120+	0.00	
Last Upd		Unallocated Receipts	0.00	

