

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

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AR RECEIVABLE / DEBTOR MASTER

Account Key: 01202

AR / Debtor Account: 01202

Type: d debtor

*Co Name / Cust Name: ARS TECHNICAL IMAGES

First / Given Names:

Cheque Beneficiary: ARS TECHNICAL IMAGES

Client Ref:

CRM Number: 00069

Contact Master: 3430

☒ Synchronize With Crm ?

Last Upd By:

Last Upd:

2: Currency Management

Managed Currency: LOCAL R

Financials: -

Current Month	0.00
Balance YTD	1,367.90

Physicals: -

Qty Current	0.00
Qty Ytd	0.00

Sales: -

Sales Current	0.00
Sales YTD	0.00

Ageing: -

Current	0.00
30+	0.00
60+	6,675.69
90+	0.00
120+	0.00
Unallocated Receipts	-5,307.79

[Date Drill](#)

[Receipts and Credits](#)

[Invoices](#)

[Matching](#)

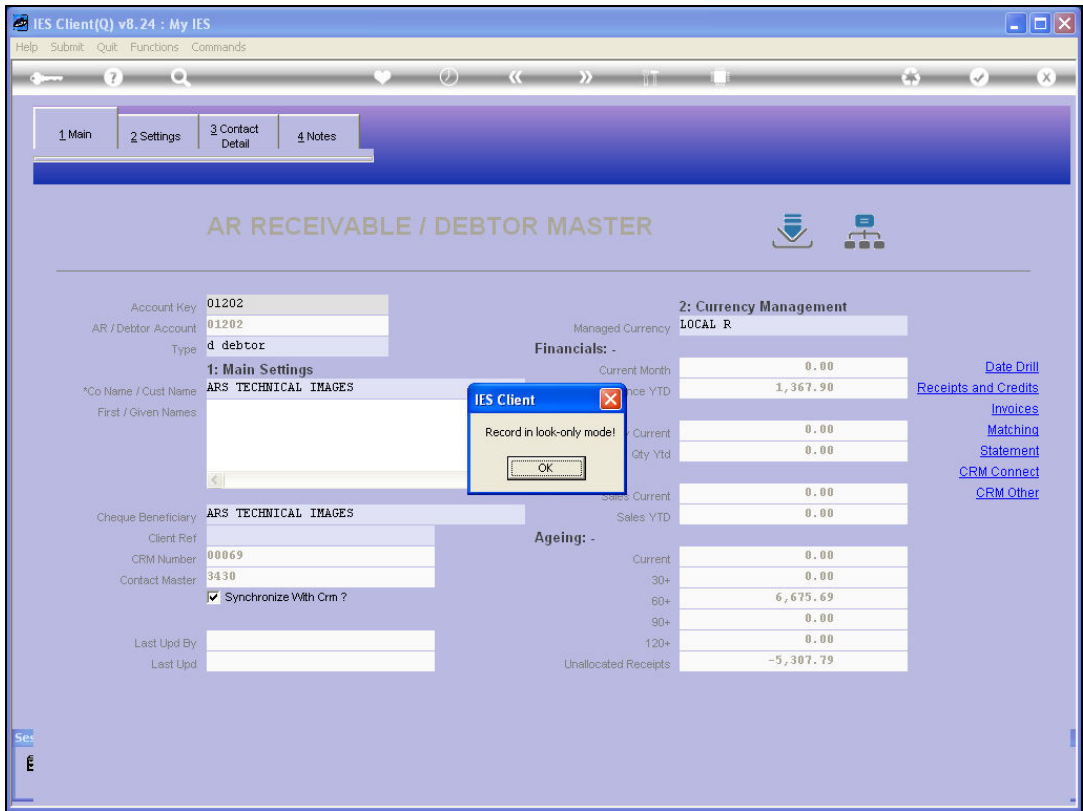
[Statement](#)

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Slide 1

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.



Slide 2

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.

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AR RECEIVABLE / DEBTOR MASTER

Account Key: 01202
AR / Debtor Account: 01202
Type: d debtor

1: Main Settings
ARS TECHNICAL IMAGES
*Co Name / Cust Name: ARS TECHNICAL IMAGES
First / Given Names:
Cheque Beneficiary: ARS TECHNICAL IMAGES
Client Ref:
CRM Number: 00069
Contact Master: 3430
☒ Synchronize With Crm ?
Last Upd By:
Last Upd:

2: Currency Management
Managed Currency: LOCAL R

Financials: -
Current Month: 0.00
Balance YTD: 1,367.90

Physicals: -
Qty Current: 0.00
Qty Ytd: 0.00

Sales: -
Sales Current: 0.00
Sales YTD: 0.00

Ageing: -
Current: 0.00
30+: 0.00
60+: 6,675.69
90+: 0.00
120+: 0.00
Unallocated Receipts: -5,307.79

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Slide 3

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.

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AR RECEIVABLE / DEBTOR MASTER

Account Key01202

AR / Debtor Account01202

Type debtor

1: Main Settings

ARS TECHNICAL IMAGES

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryARS TECHNICAL IMAGES

Client Ref

CRM Number00069

Contact Master3430

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD1,367.90

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+6,675.69

90+0.00

120+0.00

Unallocated Receipts-5,307.79

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Slide notes:

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1 Main 2 Settings 3 Contact Detail 4 Notes

AR RECEIVABLE / DEBTOR MASTER

Account Key: 01202
AR / Debtor Account: 01202
Type: d debtor

1: Main Settings
ARS TECHNICAL IMAGES

*Co Name / Cust Name
First / Given Names:

Cheque Beneficiary: ARS TECHNICAL IMAGES

Client Ref: 00069
CRM Number: 3430
Contact Master: ☒ Synchronize With Crm ?

Last Upd By:
Last Upd:

2: Currency Management
Managed Currency: LOCAL R

Financials: -

Current Month	0.00
Balance YTD	1,367.90

Physicals: -

Qty Current	0.00
Qty Ytd	0.00

Sales: -

Sales Current	0.00
Sales YTD	0.00

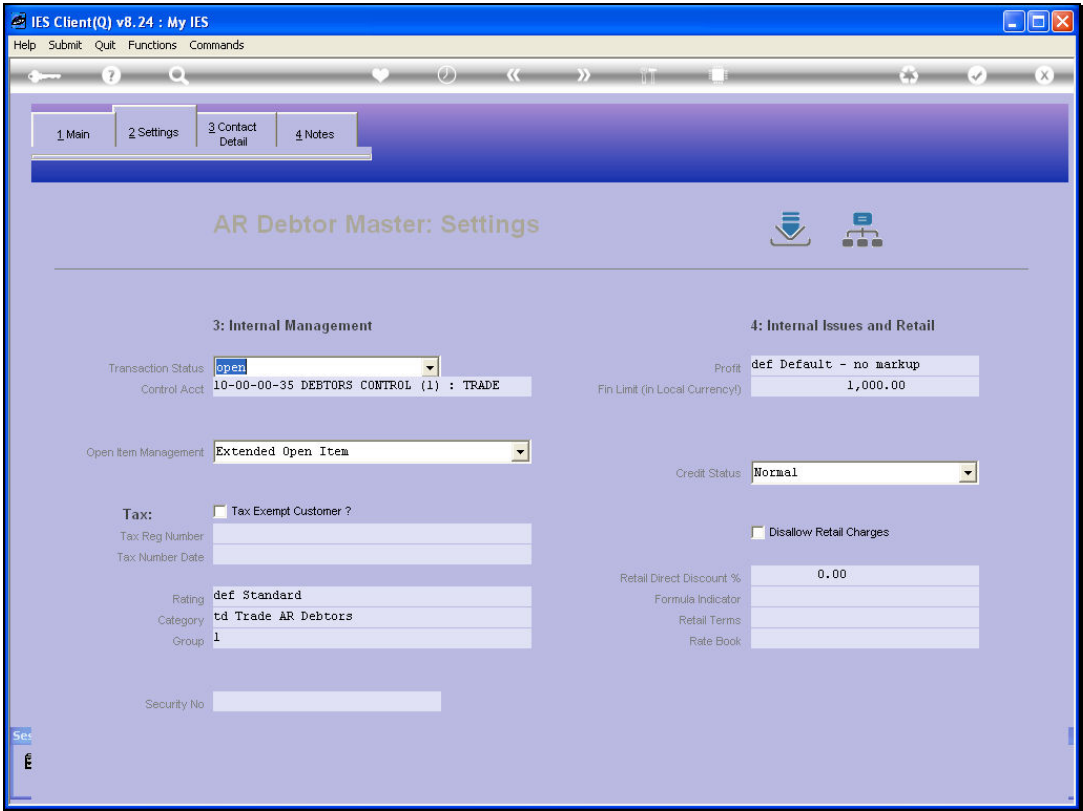
Ageing: -

Current	0.00
30+	0.00
60+	6,675.69
90+	0.00
120+	0.00
Unallocated Receipts	-5,307.79

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Slide 5

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.



Slide 6

Slide notes:

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AR RECEIVABLE / DEBTOR MASTER

Account Key01202

AR / Debtor Account01202

Type debtor

1: Main SettingsARS TECHNICAL IMAGES

*Co Name / Cust NameFirst / Given NamesARS TECHNICAL IMAGES

Cheque BeneficiaryARS TECHNICAL IMAGES

Client Ref

CRM Number00069

Contact Master3430

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency ManagementLOCAL R

Managed Currency

Financials: -

Current Month0.00

Balance YTD1,367.90

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+6,675.69

90+0.00

120+0.00

Unallocated Receipts-5,307.79

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Slide 7

Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

1 Main 2 Settings 3 Contact Detail 4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account Key: 01202
AR / Debtor Account: 01202
Type: 1

1: Main Settings
ARS TECHNICAL IMAGES

*Co Name / Cust Name
First / Given Names: ARS TECHNICAL IMAGES

Cheque Beneficiary: ARS TECHNICAL IMAGES

Client Ref: 00069
CRM Number: 3430
Contact Master: ☒ Synchronize With Crm ?

Last Upd By:
Last Upd:

2: Currency Management
Managed Currency: LOCAL R

Financials: -

Current Month	0.00
Balance YTD	1,367.90

Physicals: -

Qty Current	0.00
Qty Ytd	0.00

Sales: -

Sales Current	0.00
Sales YTD	0.00

Ageing: -

Current	0.00
30+	0.00
60+	6,675.69
90+	0.00
120+	0.00
Unallocated Receipts	-5,307.79

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Slide 8

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.

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1 Main 2 Settings 3 Contact Detail 4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account Key: 01202
AR / Debtor Account: 01202
Type: d debtor

1: Main Settings
ARS TECHNICAL IMAGES

*Co Name / Cust Name
First / Given Names

Cheque Beneficiary: ARS TECHNICAL IMAGES

Client Ref
CRM Number: 00069
Contact Master: 3430
☒ Synchronize With Crm ?

Last Upd By
Last Upd

2: Currency Management
LOCAL R

Financials: -
Current Month: 0.00
Balance YTD: 1,367.90

Physicals: -
Qty Current: 0.00
Qty Ytd: 0.00

Sales: -
Sales Current: 0.00
Sales YTD: 0.00

Ageing: -

Current	0.00
30+	0.00
60+	6,675.69
90+	0.00
120+	0.00
Unallocated Receipts	-5,307.79

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Slide 9

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

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1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account Key01202

AR / Debtor Account01202

Type debtor

1: Main Settings

ARS TECHNICAL IMAGES

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryARS TECHNICAL IMAGES

Client Ref

CRM Number00069

Contact Master3430

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

LOCAL R

Financials: -

Current Month0.00

Balance YTD1,367.90

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+6,675.69

90+0.00

120+0.00

Unallocated Receipts-5,307.79

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Slide notes:

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1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account Keynext

AR / Debtor Account Type

d debtor

1: Main Settings

*Co Name / Cust Name

First / Given Names

Cheque Beneficiary

Client Ref

CRM Number

Contact Master

1534653633

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed Currency

LOCAL R

Financials: -

Current Month

Balance YTD

0.00

0.00

Physicals: -

Qty Current

Qty Ytd

0.00

0.00

Sales: -

Sales Current

Sales YTD

0.00

0.00

Ageing: -

Current

30+

60+

90+

120+

Unallocated Receipts

0.00

0.00

0.00

0.00

0.00

0.00

Contact Manage

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Slide 11

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.

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1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

TypeA

1: Main Settings

*Co Name / Cust Name

First / Given Names

Cheque Beneficiary

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month

Balance YTD

0.00

0.00

Physicals: -

Qty Current

Qty Ytd

0.00

0.00

Sales: -

Sales Current

Sales YTD

0.00

0.00

Ageing: -

Current

30+

60+

90+

120+

Unallocated Receipts

0.00

0.00

0.00

0.00

0.00

0.00

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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.

IES Client(Q) v8.24 : My IES

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1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

*Co Name / Cust Name

First / Given Names

Cheque Beneficiary

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

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Slide notes:

IES Client(Q) v8.24 : My IES

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1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

*Co Name / Cust Name

First / Given Names

Cheque Beneficiary

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

Contact Manage

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Slide notes:

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

New Customer

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryNew Customer

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

Contact Manage

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Slide 15

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.

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Help Submit Quit Functions Commands

1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

New Customer

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryNew Customer

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

Contact Manage

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CRM Other

Date Event Drill

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Slide 16

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.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

New Customer

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryNew Customer

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

Contact Manage

CRM Connect

CRM Other

Date Event Drill

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Delete Account

Slide 17

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.

IES Client(Q) v8.24 : My IES

Help Submit Quit Functions Commands

1 Main2 Settings3 Contact Detail4 Notes

AR RECEIVABLE / DEBTOR MASTER

Save

Account KeyD00031

AR / Debtor AccountD00031

Type debtor

1: Main Settings

New Customer

*Co Name / Cust Name

First / Given Names

Cheque BeneficiaryNew Customer

Client Ref

CRM Number

Contact MasterD00031

☒ Synchronize With Crm ?

Last Upd By

Last Upd

2: Currency Management

Managed CurrencyLOCAL R

Financials: -

Current Month0.00

Balance YTD0.00

Physicals: -

Qty Current0.00

Qty Ytd0.00

Sales: -

Sales Current0.00

Sales YTD0.00

Ageing: -

Current0.00

30+0.00

60+0.00

90+0.00

120+0.00

Unallocated Receipts0.00

Contact Manage

CRM Connect

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Date Event Drill

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Slide 18

Slide notes: