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1 System requirements

1.1 System requirements client

	Suggested configuration	Minimum configuration
Computer	Intel Core i5 PC	Intel Core Duo PC
Memory	> 4 GB	2 GB
Hard drive	> 1 GB	1 GB
Monitor	22" color monitor 1980 x 1050 resolution	19" color monitor with 1280 x 1024 resolution
Operating system	Windows 7 Professional	Windows XP SP 3 / Vista
Network	Gigabit network	100Mbit TCP/IP - Network

1.2 System requirements server

The optimum configuration of the server depends on the number of users and on the database size. In order to achieve optimum performance, individual settings are essential. The following table applies to a database size of up to approx. 1 GB for 2-5 users who work simultaneously with Ingenious.V12.

	Suggested configuration	Minimum configuration
Computer	Intel Core i5 PC with hardware RAID	Intel Core Duo PC
Memory	> 4 GB	> 2 GB
Hard drive	> 20 GB	> 10 GB
Monitor	19" color monitor with 1280 x 1024 resolution	19" color monitor with 1280 x 1024 resolution
Operating system	Windows 7 Professional or Windows 2008 R2 Server	Windows XP SP 3 / Vista
Options	Uninterrupted power supply (USV) External drive for data backup, DSL internet access	Disk drive for data backup DSL internet access
Network	Gigabit - Network	100Mbit TCP/IP Network

1.3 Installation of multiple servers

The 4D server was developed as the only application to run on a computer (dedicated server). Only that way the highest stability and performance can be ensured. In some cases it is better to start the server a second time in order to be able to operate a second application. In practice this "good conscience" can be recommended only with

Windows 7 / 2008 R2 servers, since these systems offer multitasking and storage protection. On all other operating systems, neither the integrity of the RAM nor sufficient computing performance are ensured. If two 4D servers run on a machine then the use of two processors makes more sense.

The 4D Server – 4D Client Communication with TCP/IP

During communication with TCP/IP between the client and servers, the "Ports" also always come into play. The standard port number used during communication between the 4D server and the 4D client is:

Port 19813

In order to be able to use TCP/IP communication, the TCP configuration must be correctly installed on the respective computer. This means a distinct IP number and sub-network screen, for example:

4D Server: 192.168.10.10

4D Client 1: 192.168.10.11

4D Client 2: 192.168.10.12

Sub-network: 255.255.255.0

Example of a configuration with two 4D servers for TCP/IP operation

It is possible to change the port number directly in the settings of the 4D server.

This information is stored in the structure file of the database and on each client computer. The 4D server and 4D client use the standard port number 19813. When you change this value on the 4D server or the 4D client, it will be automatically transferred to all 4D client computers that are registered on the database. Other off-line computers will update when you enter the new port number during the next registration in the connection dialogue on the side adapted. This will be attached to the IP address of the server computer separately by colon.

Accessibility: expanded log on dialog

- Start the 4D Client.
- Select the "adapted" register map.
- Enter name for the database.
- IP number of the 4D Server "colon - changed Port Number", i.e. 192.168.10.112:19814.
- Confirm by clicking on "OK"!

Result: The client is configured as such that you can log on to both servers. When starting the 4D client a second time, you will find the manually-setup 4D server in your favorites.

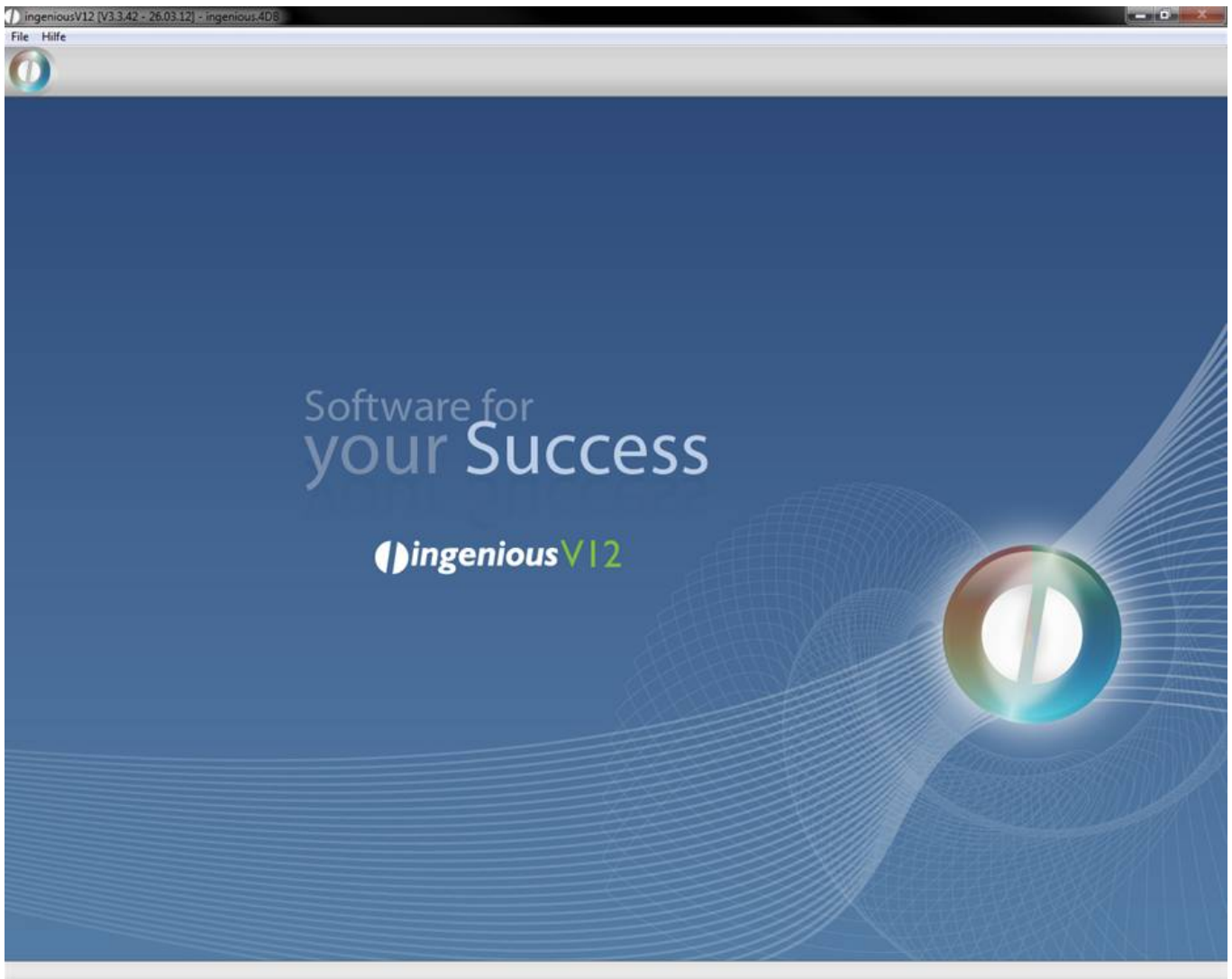
2 User interface

2.1 The user interface

During the entire software development process, the Ingenious team placed a lot of attention on the easy operation of all modules as well as on an ergonomic user interface. Therefore, starting Ingenious.V12 is intuitive and does not require too much instruction. Ingenious.V12 operates entirely with a mouse. Memorization of keyboard commands is therefore unnecessary. The use of a mouse is very significant, especially when quickly navigating in the list view by scrolling. This useful function is consistently supported by Ingenious.V12. Fundamental operation principals are briefly described in the following chapter in order to make it possible for you to have an effective entry into Ingenious.V12.

2.2 Main menu and work area

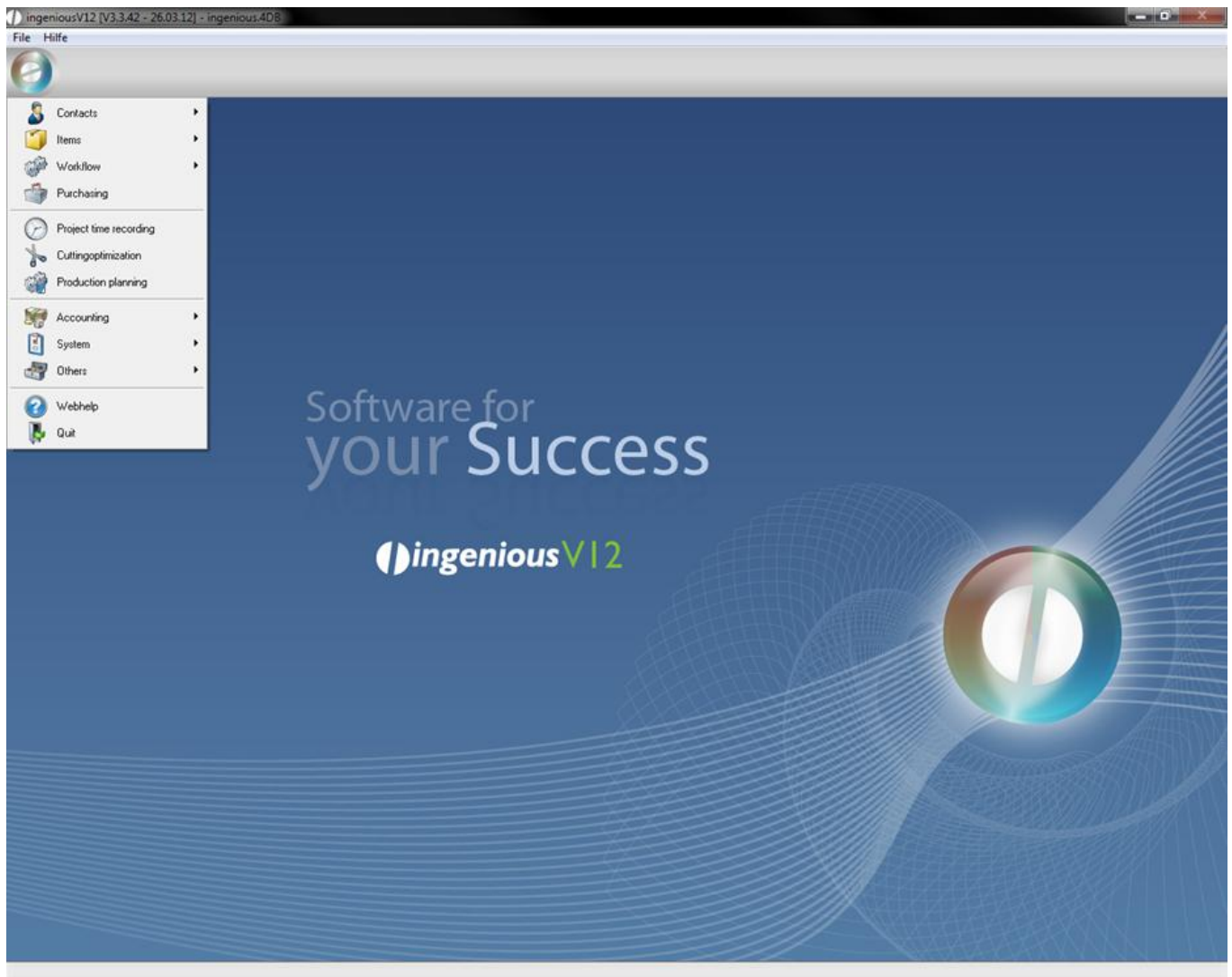
After starting and logging on to Ingenious.V12, you will have an initial view of the work area of Ingenious.V12. This consists of a main window that is opened in full view and that is automatically adapted to your selected monitor resolution.



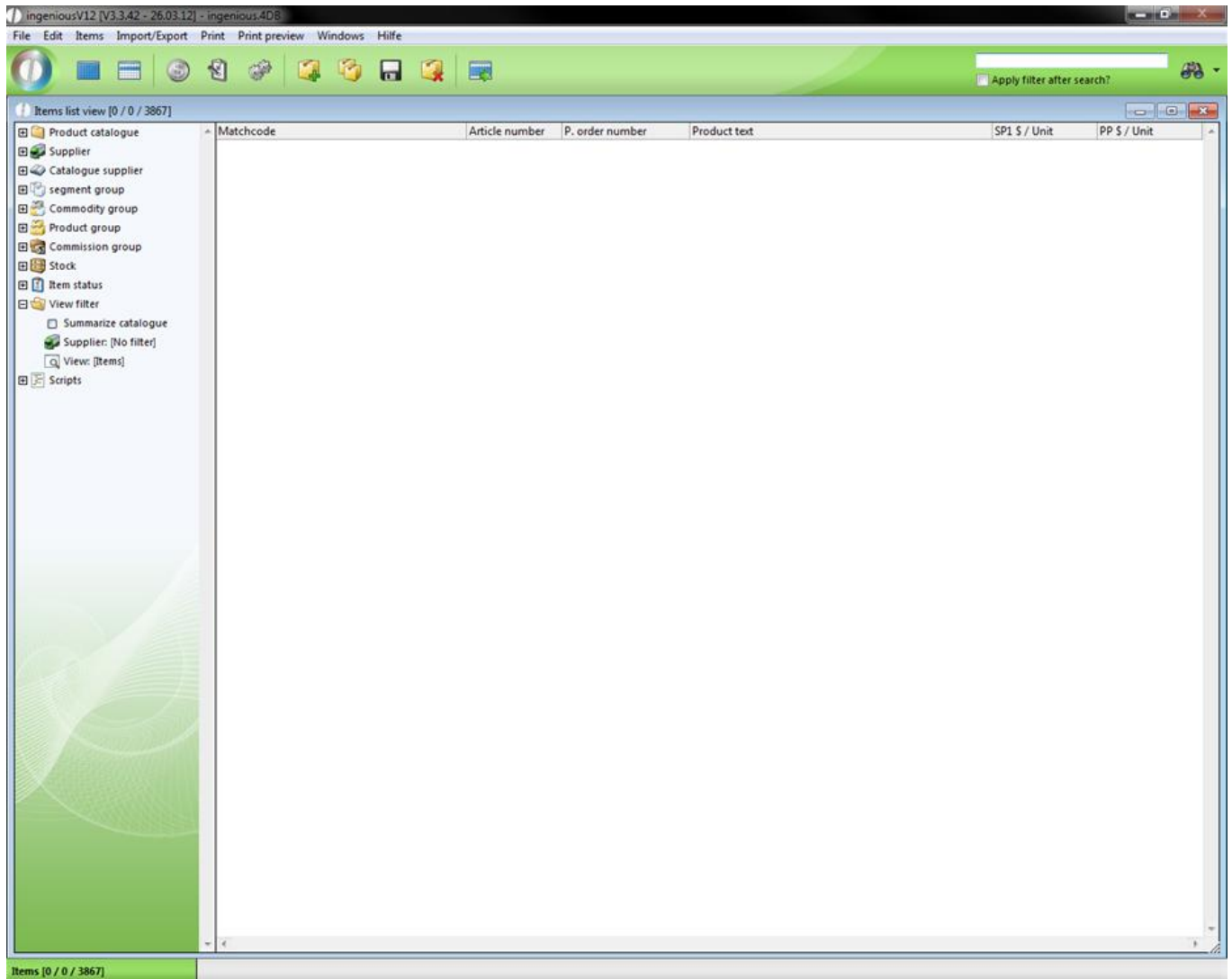
Ingenious.V12 work environment

You can open the main menu by clicking on the round ingenious V12-symbol in the left upper corner.

More windows can be simultaneously opened within this main window. From here, you can easily access the individual modules and management tools with the click of a mouse.



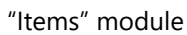
As soon as you move the cursor over an area, the color of the tab will change. With a simple mouse click you can open the desired module in a separate window.



Work environment with an open window in Ingenious.V12

2.3 Maintaining an overview with color

Each module in Ingenious.V12 has a symbol and its own color area: Contacts are orange, Items green, Workflow blue and Purchasing yellow. Administrative tool modules such as Time Management, accounting, system areas and miscellaneous areas are uniformly displayed in light gray. The identification colors of these areas are used consistently in the entire program and thus always act as a clear point of orientation. Therefore, working with several windows in particular becomes very easy since each window can already be assigned by a color characteristic at the initial view - fast and problem-free.



ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Contacts Print Print preview Windows Hilfe

Apply filter after search?

Contacts list view [1 / 9 / 11]

☒ Contact type
☐ Prospect [Off]
☒ Customer [On]
☐ Employee [Off]
☐ Supplier [Off]
☐ Manufacturer [Off]
☒ View filter
☒ Disabled [Off]
☐ View: [ABC Customer]
☒ Representative
☐ Trip
☐ Area
☐ Group
☐ Contacts folder
☐ Country
☐ Method of payment

Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	

ABC Customer [1 / 9 / 11]

"Contacts" module

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File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 11 / 44]

Project filter

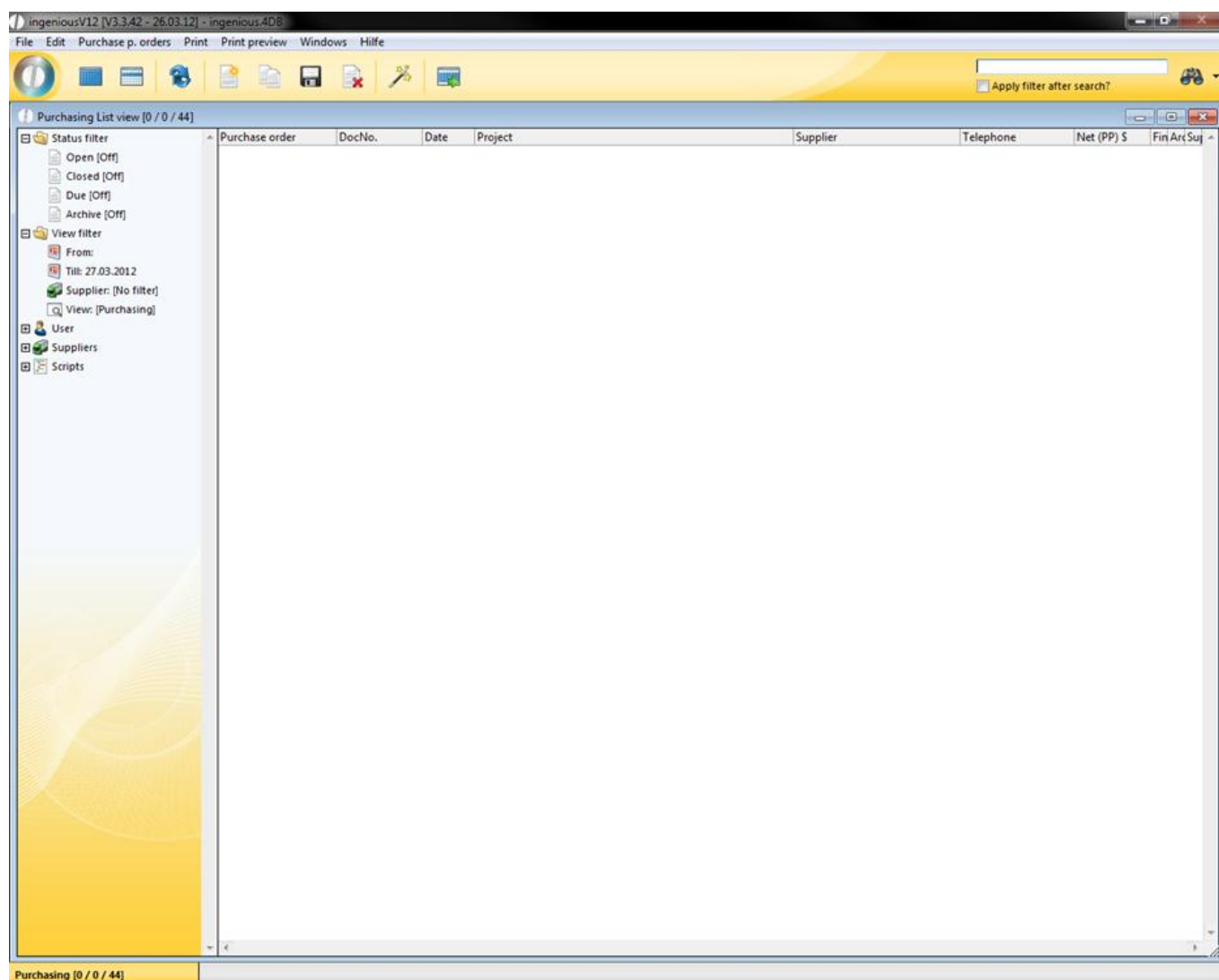
- Quotations [On]
- Orders [Off]
- Delivery notes [Off]
- Invoices [Off]
- Credit notes [Off]
- Status filter
 - ☐ Paid inv. [Off]
 - ☐ Archiv. documents [Off]
- View filter
 - From: 02.06.2011
 - Till: 27.03.2012
 - Customer: [No filter]
 - Status: [No filter]
 - Client: [No filter]
 - View: [1 Quotes]
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	fin. arc
Quotation	03232012/00037	23.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763,20 \$	
Quotation	03232012/00036	23.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0,00 \$	
Quotation - HV	03162012/HV000	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3.738,00 \$	
Quotation - Roll	03162012/Roll000	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$	
Quotation	03152012/00033	15.03.12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13.105,53 \$	
Quotation	03152012/00032	15.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$	
Quotation - HV	03142012/HV000	14.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1.526,40 \$	
Quotation	03142012/00030	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$	
Quotation	03142012/00029	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1.198,80 \$	
Quotation	03142012/00028	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$	
Quotation	03142012/00031	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55,00 \$	

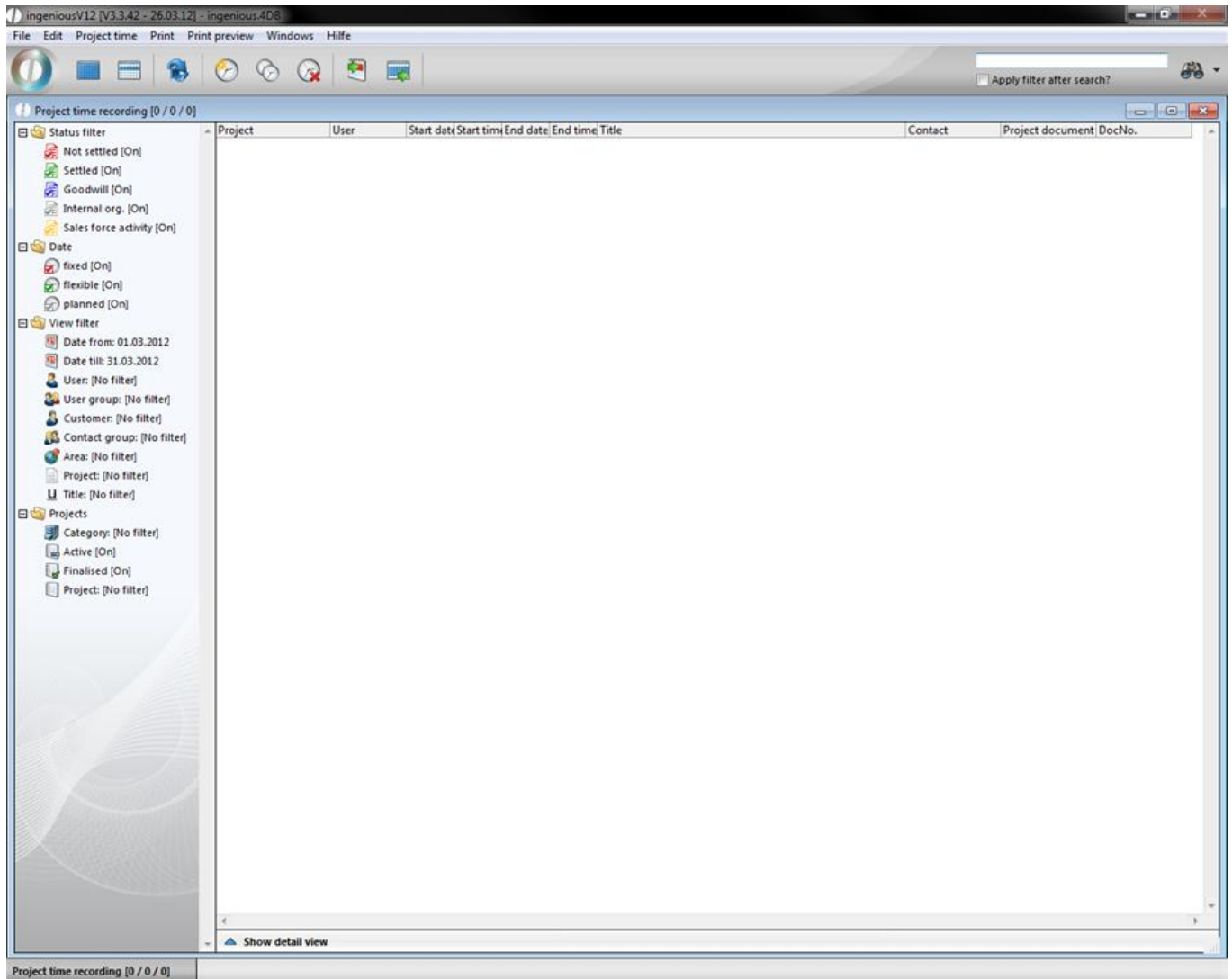
Show project totals

1 Quotes [1 / 11 / 44]

“Workflow” module



"Purchasing" module



“Project time recording” module

2.4 Working with multiple windows

With a simple click on an entry in the tab bar, a window is brought to the foreground. The menu bar of the main window changes accordingly, and adapts in a context sensitive manner to the window that is centered in the foreground.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious4DB

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 42 / 44]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- Paid inv. [On]
- Archiv. documents [On]
- View filter
- From: 01.01.2012
- To: 31.03.2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	03232012/00039	23.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763,20 \$	763,20 \$					
Order confirmation	03232012/00067	23.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2.862,00 \$						
Quotation	03232012/00038	23.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2.862,00 \$						
Quotation	03232012/00037	23.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763,20 \$						
Quotation	03232012/00036	23.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0,00 \$						
Credit note	03162012/00001	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$	1.598,70 \$					
Order confirmation	03162012/00066	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$						
Delivery note	03162012/00001	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$						
Quotation - HV	03162012/HV000	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3.738,00 \$						
Invoice	03162012/00038	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$	1.598,70 \$					
Quotation - Roll	03162012/Roll000	16.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.598,70 \$						
Quotation	03152012/00033	15.03.12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13.105,53 \$						
Quotation	03152012/00032	15.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$						
Quotation - HV	03142012/HV000	14.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1.526,40 \$						
Quotation	03142012/00030	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$						
Quotation	03142012/00029	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1.198,80 \$						
Quotation	03142012/00028	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0,00 \$						
Quotation	03142012/00031	14.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55,00 \$						
Order confirmation	03142012/00062	14.03.12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763,20 \$						
Order confirmation	03132012/00057	13.03.12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88.560,00 \$						
Order confirmation	03082012/00052	08.03.12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11.246,40 \$						
Order confirmation	03082012/00051	08.03.12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18.660,80 \$						
Order confirmation	03082012/00050	08.03.12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18.134,40 \$						
Order confirmation	03082012/00049	08.03.12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10.062,28 \$						
Order confirmation	03082012/00048	08.03.12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12.932,00 \$						
Order confirmation	03082012/00047	08.03.12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15.934,16 \$						
Order confirmation	03082012/00046	08.03.12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7.116,91 \$						
Order confirmation	03082012/00045	08.03.12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18.660,80 \$						
Order confirmation	03082012/00044	08.03.12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16.076,00 \$						
Order confirmation	03082012/00043	08.03.12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7.384,42 \$						
Order confirmation	03082012/00042	08.03.12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9.264,00 \$						
Order confirmation	03082012/00040	08.03.12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4.764,80 \$						
Order confirmation	03082012/00041	08.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637,56 \$						
Invoice	03082012/00037	08.03.12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5.000,00 \$	5.000,00 \$					
Invoice	03082012/00036	08.03.12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10.000,00 \$	10.000,00 \$					
Invoice	03082012/00035	08.03.12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5.000,00 \$	5.000,00 \$					
Invoice	03082012/00034	08.03.12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10.000,00 \$	10.000,00 \$					
Invoice	03082012/00033	08.03.12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40.000,00 \$	40.000,00 \$					
Invoice	03082012/00032	08.03.12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50.000,00 \$	50.000,00 \$					
Order confirmation	03082012/00039	08.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2.263,74 \$						
Order confirmation	03082012/00038	08.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1.097,00 \$						
Order confirmation	03072012/00037	07.03.12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31.329,92 \$						

Show project totals

Items [0 / 3867] ABC Customer [1 / 9 / 11] 2 Projects [1 / 42 / 44]

View of multiple windows in Ingenious.V12

With a mouse-click, the menu instructions can be retrieved and implemented in the selected module. Anything within the work area of the windows opened by Ingenious.V12 has its own icon bar with self-explanatory icons.

The screenshot shows the 'ingenious.V12' application window. The title bar indicates the version is V3.3.42 and the date is 26.03.12. The menu bar includes File, Edit, Contacts, Print, Print preview, Windows, and Hilfe. The toolbar has icons for creating a new contact and applying filters. The main window displays a 'Contacts list view' with a table of 11 contacts. The sidebar on the left contains a tree view with categories like Contact type, View filter, and other filters.

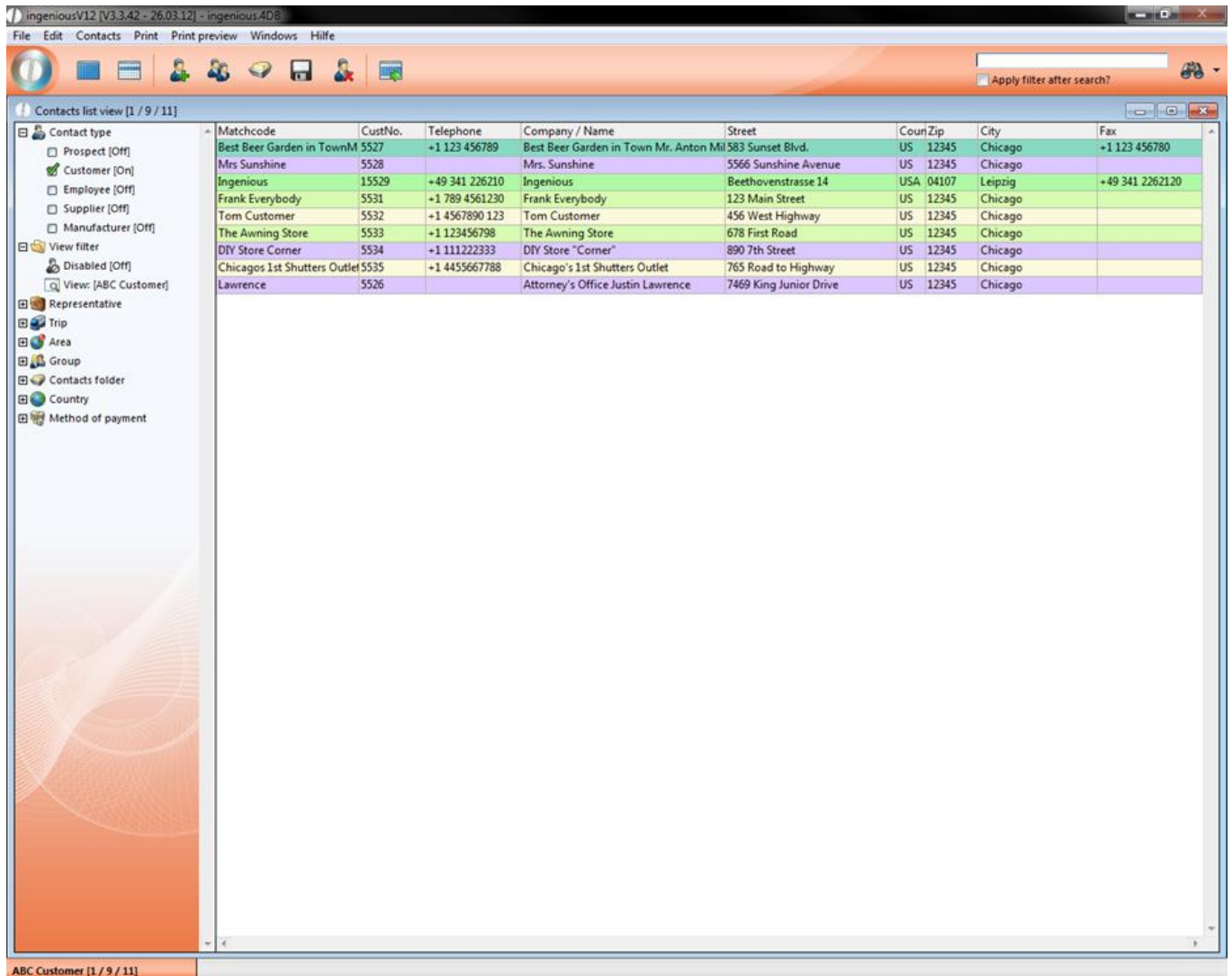
Matchcode	CustNo.	Telephone	Company / Name	Street	Coun	Zip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US	12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US	12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA	04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US	12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US	12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US	12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US	12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US	12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US	12345	Chicago	

View of the icon list

Thus one can easily implement instructions with the click of a mouse. If the meaning of an icon should not open for you immediately, it is sufficient to keep the cursor of the mouse over an icon. Within a short time, significant explanation texts appear.

2.5 The list views

In this view, multiple data phrases are illustrated in a tabular format. Therefore, the list view is also the "Standard view" in every module.



List view in the "Contacts" module

Every list view consists of two parts. They are the list view for the display of the data phrases and the selection area for the selection of the data phrase in the display.

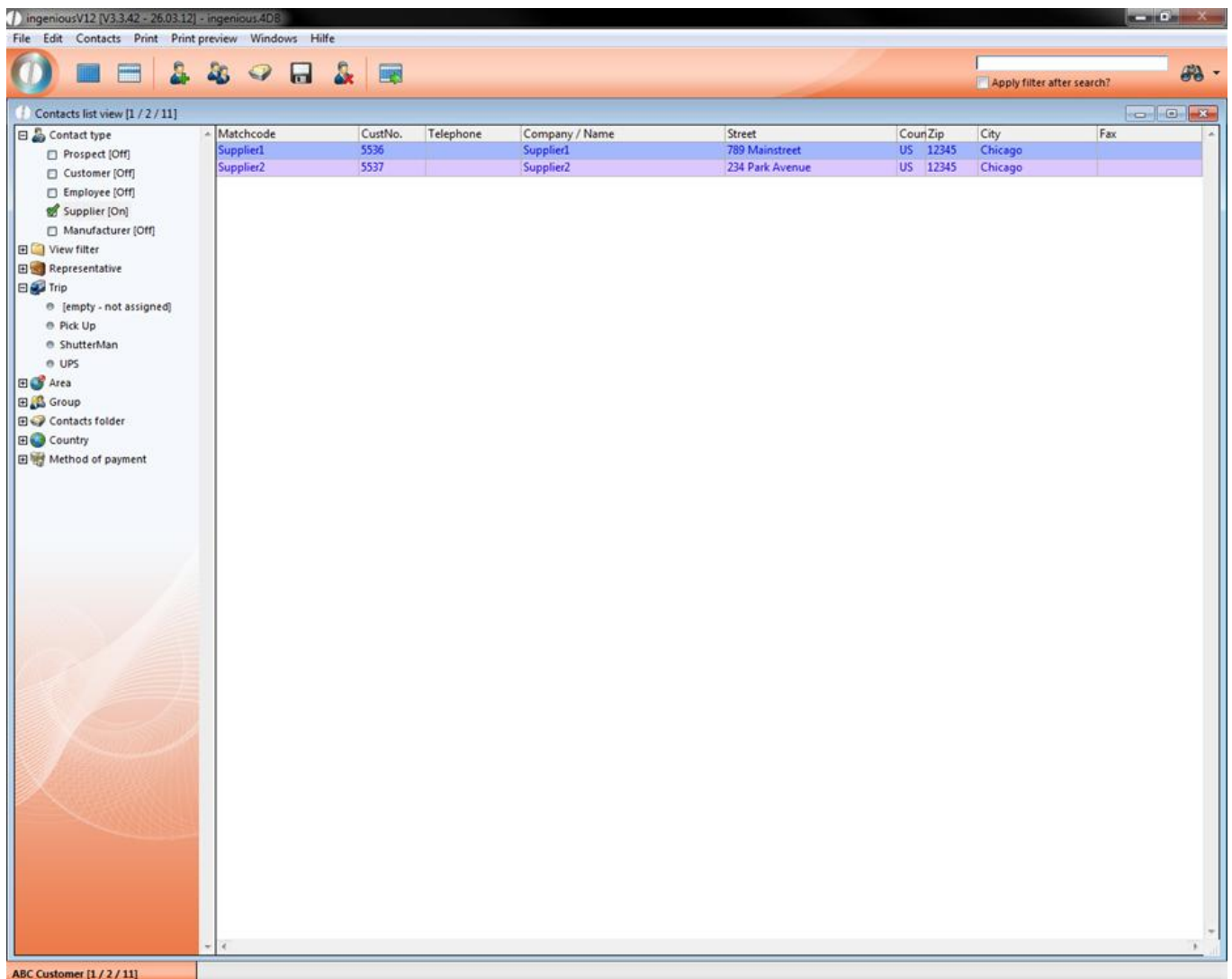
List area

In order to always be able to see all data records, a so-called "scroll bar" is included in the list area. These can be simply clicked and moved around in order to be able to move the visible range. The sorting of data records can be executed with a click on the header of the respective column. With each repetition the data records are sorted in ascending or descending order.

Selection area


In the selection area, filters are given, after which the data records within the list range can be indicated. In each file there are different filter possibilities that are represented by an icon. In order to open a file, click on the small plus in front of the file in order to close it to the small minus.


In order to use a filter, is sufficient to click on the icon with your mouse. Through filtering one separates "The chaff from the wheat", so to speak. If one selects the supplier filter in the "Contacts" module, then only contacts who are suppliers appear, etc.



List view in the "Contacts" module with active supplier filter

The filters such as purchasing in the "Selection" areas of the workflow module are a little more complex. Here one can switch several filter combinations on and off.

With the view filters, one can filter all orders, for example, for one specific period of time. Simply double-click on the calendar icon  and a calendar will appear, in which you can select the start and/or end of the time period.

Now you only have to update the switch button  to refresh the view.

In the list view, you can select multiple or all data records with the click of a mouse. All subsequent activities are then limited to these data records. This is significant when printing lists for example.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 12 / 44]

Project filter

- Quotations [On]
- Orders [Off]
- Delivery notes [Off]
- Invoices [Off]
- Credit notes [Off]
- Status filter
- Paid inv. [On]
- Archiv. documents [On]
- View filter
- From: 1/16/2006
- Till: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						

Show project totals

ABC Customer [3 / 9 / 11] 2 Projects [1 / 12 / 44]

List view with selected data record

Workflow List view [4 / 12 / 44]

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						

ABC Customer [3 / 9 / 11] 2 Projects [4 / 12 / 44]

List view with multiple selected data records

2.6 The detailed view

In order to change from the list view to the detailed view, it is sufficient to double-click on any data record! The detail view stores all information of a data file, while the list view offers only a rough overview. With the icons within the data selection area (left), the individual detail areas (right) for example, the address data, financial data, etc. are clearly divided. Simply click and the detail range changes respectively. In the different modules you will encounter completely different detail views with completely different detail areas. Among them are entry forms, text processing, table views, calculation views and product views. With the help of the data selection area, you can select the different detail views of the respective data record. The detail area is essentially responsible for the data or data output.

Entry forms

Entry forms assist in the input of data. In such a form, you can find popup fields, protected and un-protected data input fields as well as clickable selection fields and various switch buttons that facilitate the input of data for you.

The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42' and the database 'ingenious.408'. The menu bar includes 'File', 'Edit', 'Contacts', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains various icons for navigation and actions. A search bar with the text 'Apply filter after search?' is located in the top right corner.

The main window is titled 'Contacts detail view [Tom Customer]'. It features a left-hand sidebar with a tree view containing the following items: 'Contact data', 'Additional addresses / Trips', 'Financial data / Classification', 'Special prices', 'CRM information', 'Documents & Dates', 'own fields', 'File attachments', 'Webservices', and 'Show projects'. The 'Contact data' item is currently selected.

The main content area is divided into several sections:

- Miscellaneous:** Includes a 'Matchcode' field with the value 'Tom Customer', a 'Customer number' field with the value '5532', and a 'Contacttyp' field with a user icon.
- Company / Name:** A text field containing 'Tom Customer'.
- Street:** A text field containing '456 West Highway'.
- Country:** A dropdown menu set to 'US'. To its right are fields for 'State' (set to 'IL'), 'ZIP' (set to '12345'), and 'City' (set to 'Chicago'). Below these are fields for 'State', 'ZIP', and 'P.O. Box'.
- Contact person:** A text field.
- Salutation:** A dropdown menu set to 'Dear Mr. Customer'.
- Communication:** Includes a 'Phone' field with the value '+1 4567890 123', a 'Fax' field, an 'Email' field, and a 'WWW' field.
- Notes:** A large text area with the label 'PinUp note'. Below it is a checkbox labeled 'Show notes in project'.

At the bottom of the window, there is a status bar showing 'Created 4/25/2007 16:07:53 - cjaeger' and 'Modified 3/14/2012 14:20:53 - admin'.

Entry form in the "Contacts" module

Table view

Tables provide an overview. For this reason, you will also find tables for the fast creation of invoices in the detailed view.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.ADB

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Best Beer Garden in Town/Mr Anton Miller] - [Order confirmation 03232012/00067]

Header text

File Edit View Insert Style Colors Paragraph Format Tools

Normal Arial 9 B I U

(Salutation)

thanks for your order

Item	Items	ArtNo.	Name	Quantity				Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	2.00	56.000	56.000		35.04	763.20	1,526.40	0.00	1,526.40	310.
002	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	1.00	50.000	60.000		33.58	699.60	699.60	0.00	699.60	148.
003	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	1.00	48.000	56.000		34.07	636.00	636.00	0.00	636.00	139.

PP [USD] 598.29 Before CM = 2221 USD 371% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 2,862.00 After CM = 2221 USD 371% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 2,862.00

File Edit View Insert Style Colors Paragraph Format Tools

Normal Arial 9 B I U

kind regards

Alfred Tester

Footer text

[Order confirmation 03232012/00067]

Table view in the "Workflow" module

Price tables

Calculation tables, on the other hand, provide the automatic calculation of products and product prices.

The screenshot displays the 'ingenious.V12' software interface, specifically the 'Items detail view [-Accordion_HV_Price_Matrix]'. The main window shows a large table with columns labeled A through P and rows numbered 1 to 31. The table contains numerical data, likely representing prices or costs. A sidebar on the left lists various modules: Product texts, Parameter, Product picture, Accessories, own fields, File attachments, Stock monitor, Orderparameters, and Prices. The 'Prices' module is currently selected. At the bottom of the window, there is a control panel with fields for 'Price per unit' (set to 1), 'Weight [kg]' (set to 0.000), 'Conversion' (set to 1), 'Min. CM [%]' (set to 0.00), 'Waste [%]' (set to 0), and 'Rounding to' (set to 0). The status bar at the bottom indicates the current view is '[-Accordion_HV_Price_Matrix]'.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	C
1		42	48.5	55	61.5	68	74.5	81	87.5	94	100.5	107	113.5	120	126.5	133	139.5
2	18	272.4	302.4	333.6	366	397.2	427.2	459.6	490.8	523.2	553.2	584.4	616.8	648	678	710.4	741.6
3	24	321.6	358.8	396	433.2	470.4	506.4	543.6	580.8	618	655.2	691.2	728.4	765.6	802.8	840	876
4	30	373.2	416.4	458.4	500.4	543.6	585.6	628.8	670.8	712.8	754.8	796.8	841.2	883.2	925.2	967.2	1010.4
5	36	424.8	472.8	519.6	568.8	616.8	663.6	712.8	760.8	807.6	856.8	904.8	951.6	1000.8	1047.6	1095.6	1144.4
6	42	475.2	529.2	582	636	688.8	742.8	796.8	849.6	904.8	957.6	1011.6	1064.4	1118.4	1171.2	1225.2	1276
7	48	526.8	585.6	645.6	703.2	763.2	822	880.8	939.6	999.6	1057.2	1117.2	1176	1236	1293.6	1353.6	1412.4
8	54	578.4	643.2	708	770.4	835.2	900	964.8	1029.6	1094.4	1159.2	1224	1288.8	1353.6	1417.2	1480.8	1545.6
9	60	628.8	699.6	769.2	840	909.6	979.2	1050	1119.6	1189.2	1258.8	1329.6	1400.4	1470	1540.8	1610.4	1680
10	66	680.4	754.8	831.6	907.2	981.6	1058.4	1134	1209.6	1284	1360.8	1436.4	1512	1587.6	1663.2	1738.8	1813.2
11	72	730.8	812.4	894	974.4	1056	1136.4	1218	1298.4	1381.2	1461.6	1543.2	1623.6	1705.2	1785.6	1868.4	1948.8
12	78	781.2	868.8	955.2	1042.8	1129.2	1215.6	1303.2	1388.4	1476	1562.4	1648.8	1736.4	1822.8	1909.2	1995.6	2083.2
13	84	832.8	925.2	1017.6	1110	1202.4	1293.6	1386	1478.4	1570.8	1663.2	1755.6	1848	1940.4	2031.6	2124	2216.4
14	90	884.4	981.6	1080	1177.2	1275.6	1372.8	1470	1568.4	1665.6	1764	1861.2	1958.4	2058	2155.2	2253.6	2350.8
15	96	936	1039.2	1142.4	1244.4	1348.8	1452	1555.2	1658.4	1762.8	1864.8	1968	2071.2	2175.6	2278.8	2380.8	2481.6
16	102	986.4	1095.6	1203.6	1314	1422	1530	1639.2	1747.2	1857.6	1965.6	2074.8	2182.8	2293.2	2401.2	2509.2	2618.4
17	108	1038	1152	1266	1381.2	1494	1609.2	1724.4	1837.2	1952.4	2067.6	2180.4	2295.6	2409.6	2523.6	2638.8	2752.8
18	114	1089.6	1208.4	1328.4	1448.4	1568.4	1688.4	1808.4	1927.2	2047.2	2167.2	2287.2	2407.2	2526	2647.2	2767.2	2887.2
19	120	1138.8	1264.8	1389.6	1515.6	1640.4	1766.4	1891.2	2017.2	2142	2268	2392.8	2518.8	2643.6	2769.6	2895.6	3021.6
20	126	1190.4	1321.2	1452	1584	1714.8	1845.6	1976.4	2107.2	2239.2	2370	2499.6	2630.4	2761.2	2893.2	3024	3154.4
21	132	1242	1377.6	1514.4	1651.2	1786.8	1924.8	2060.4	2196	2334	2469.6	2607.6	2743.2	2878.8	3016.8	3152.4	3288.8
22	138	1292.4	1435.2	1575.6	1718.4	1861.2	2002.8	2145.6	2286	2428.8	2571.6	2713.2	2854.8	2996.4	3139.2	3282	3422.4
23	144	1344	1491.6	1639.2	1785.6	1934.4	2082	2229.6	2376	2523.6	2671.2	2820	2967.6	3114	3261.6	3409.2	3556
24	150	1395.6	1548	1701.6	1855.2	2007.6	2161.2	2313.6	2467.2	2618.4	2772	2925.6	3078	3231.6	3384	3537.6	3691.2
25	156	1446	1604.4	1764	1922.4	2080.8	2239.2	2397.6	2557.2	2715.6	2874	3032.4	3190.8	3349.2	3508.8	3667.2	3825.6
26	162	1496.4	1660.8	1825.2	1989.6	2152.8	2318.4	2481.6	2647.2	2810.4	2973.6	3139.2	3302.4	3466.8	3631.2	3795.6	3958.8
27	168	1548	1717.2	1887.6	2056.8	2227.2	2396.4	2565.6	2736	2905.2	3075.6	3244.8	3415.2	3584.4	3753.6	3922.8	4093.2
28	174	1599.6	1773.6	1950	2124	2300.4	2473.2	2650.8	2826	3000	3177.6	3350.4	3526.8	3700.8	3877.2	4051.2	4227.6
29	180	1651.2	1831.2	2011.2	2191.2	2374.8	2551.2	2734.8	2916	3096	3278.4	3456	3639.6	3818.4	3999.6	4179.6	4363.2
30	186	1702.8	1887.6	2073.6	2258.4	2449.2	2629.2	2820	3006	3190.8	3380.4	3561.6	3751.2	3936	4122	4306.8	4497.6
31	192	1754.4	1944	2136	2325.6	2522.4	2707.2	2904	3096	3285.6	3482.4	3667.2	3864	4053.6	4245.6	4435.2	4631.2

Calculation table in the "Product" module

Text processing

In Ingenious.V12, integrated text processing provides the fast and uncomplicated creation of texts and a print preview.

Purchase order 03142012/00009

Item	Product	Qty	Unit Price \$	Extend. Price \$
001	HV Blade no.3 16.5ft white FL 345302-01 - Length: 198"	120.00	19.31	2,316.60
002	HV #3 Long Screw FL 343003-00 -	8,000.00	0.13	1,040.00
003	HV CENTERMATE no.1 20ft beige FL 341400-03 - Length: 240"	6.00	56.20	337.20
004	HV CENTERMATE no.1 20ft white FL 341400-01 - Length: 240"	126.00	56.20	7,081.20
005	HV CEILING HEADER No.1 20ft beige FL 340000-03 - Length: 240"	4.00	56.80	227.20
006	HV CEILING HEADER No.1 20ft white FL 340000-01 - Length: 240"	100.00	56.80	5,680.00
007	HV CORNER CENTERMATE no.3 20ft Ivory FL 341402-02 - Length: 240"	6.00	60.40	362.40
008	HV FLOATING CENTERMATE no.2 20ft Ivory FL 341401-02 - Length: 240"	4.00	52.20	208.80
009	HV 3/8 inch DIRECT MT STARTER 20ft beige FL 341201-03 - Length: 240"	4.00	49.20	196.80
010	HV 90/180 STARTER 20ft beige FL 341200-03 - Length: 240"	14.00	16.40	229.60
011	HV 90/180 STARTER 20ft white FL 341200-01 - Length: 240"	140.00	16.40	2,296.00
012	HV Long Screw FL 343000-00 -	4,000.00	0.13	520.00
013	HV Short Screw FL 343001-00 -	2,000.00	0.10	200.00
014	HV Hat Bushings FL	4,000.00	0.01	40.00

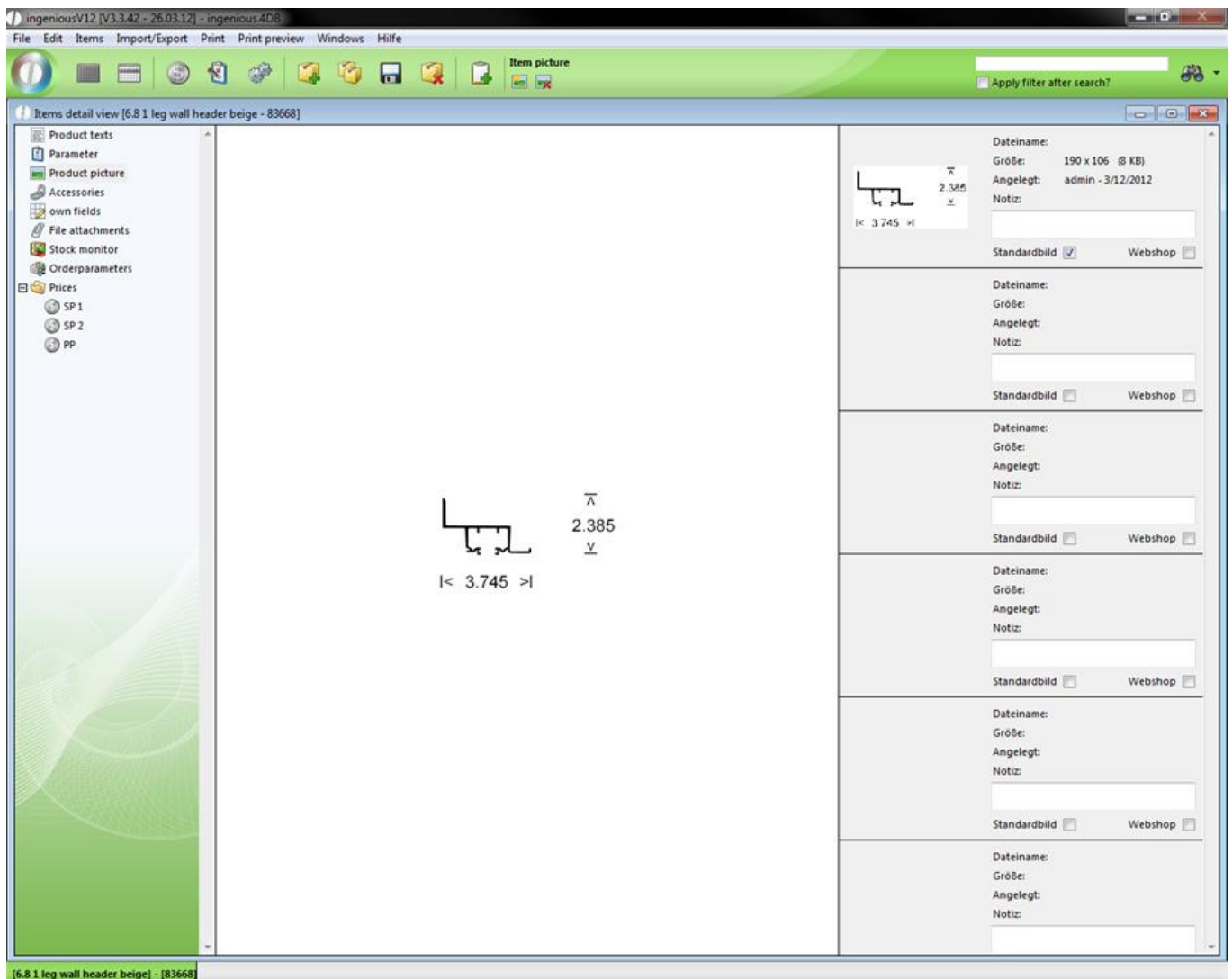
Ingenious Shutters - Any shape, Any size, Any time
 555 Sunset Blvd. Phone: 480-834-0028, Fax: 480-833-5204
 Internet: www.ingenious-shutters.com - Page: 1 of 2

Page 2 2/2 Line 1, Col 44 NUM CAPS

Text processing in the "Purchasing" module

Image views

Ingenious.V12 offers you the possibility to assign a corresponding image to the product.



Product picture view in the "Items" module

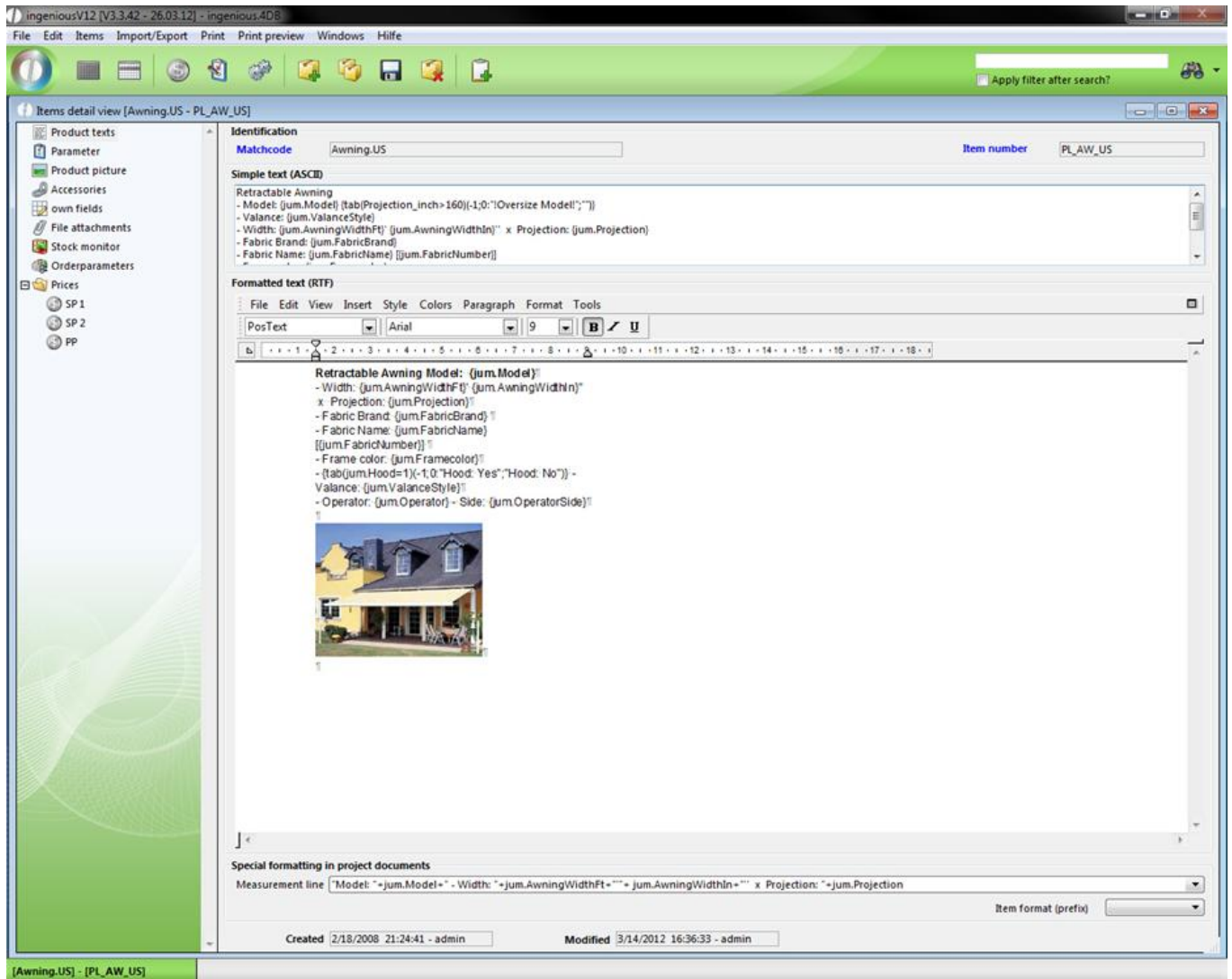
Data selection area

There are four different data selection areas: one for contacts, one for products, one for the workflow modules and one for purchasing. In the "Contacts" module, you will find the following data selection area in the detail view:

The screenshot displays the 'Contacts detail view' for 'Tom Customer' in the ingenious.V12 application. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains a tree view with the following items: Contact data, Additional addresses / Trips, Financial data / Classification, Special prices, CRM information, Documents & Dates, own fields, File attachments, Webservices, and Show projects. The main content area is titled 'Contacts detail view [Tom Customer]' and contains several sections: 'Miscellaneous' with fields for Matchcode (Tom Customer), Customer number (5532), Company / Name (Tom Customer), Street (456 West Highway), Country (US), State (IL), ZIP (12345), City (Chicago), P.O. Box, and Birthday (00/00/00); 'Communication' with fields for Phone (+1 4567890 123), Fax, Email, and WWW; and 'Notes' with a PinUp note field. At the bottom of the main area, there is a 'Show notes in project' checkbox and a status bar showing 'Created 4/25/2007 16:07:53 - cjaeger' and 'Modified 3/14/2012 14:20:53 - admin'.

Detail view in the "Contacts" module

Within the "Contact Data" area, you will find "Name", "Address", "Telephone Number", "Fax" and "Contact Type" for each contact, for example. Within the section "Additional Addresses/Routes", additional address and routes can be added to the contact. The area "Financial Data/Classification" contains all pertinent information regarding invoices, payment method, reminders and bank account information. Under "Special Prices" you can assign special prices to each contact. Within the "CRM Information" area, quotes and orders, sales, invoices and credits as well as client reminder letters, among other things, are represented in either a monthly or annual overview. In the column "Documents & Notes" you can create and file different documents yourself. This has the advantage that you can directly tie documents to your contacts, and therefore have an overview of the entire communication with the contact. Under the "Individual Fields" area, you have the possibility of making individual comments about each contact. In the "File Creation" area, important external documents can be assigned to the individual contacts, centrally managed and stored. In the "Variant Column" templates, it is possible to save specific contact-specific measurement data of a product as a template (Template/ Setup) under one client. By clicking on "Show Projects", the module production window opens with collected contact projects.




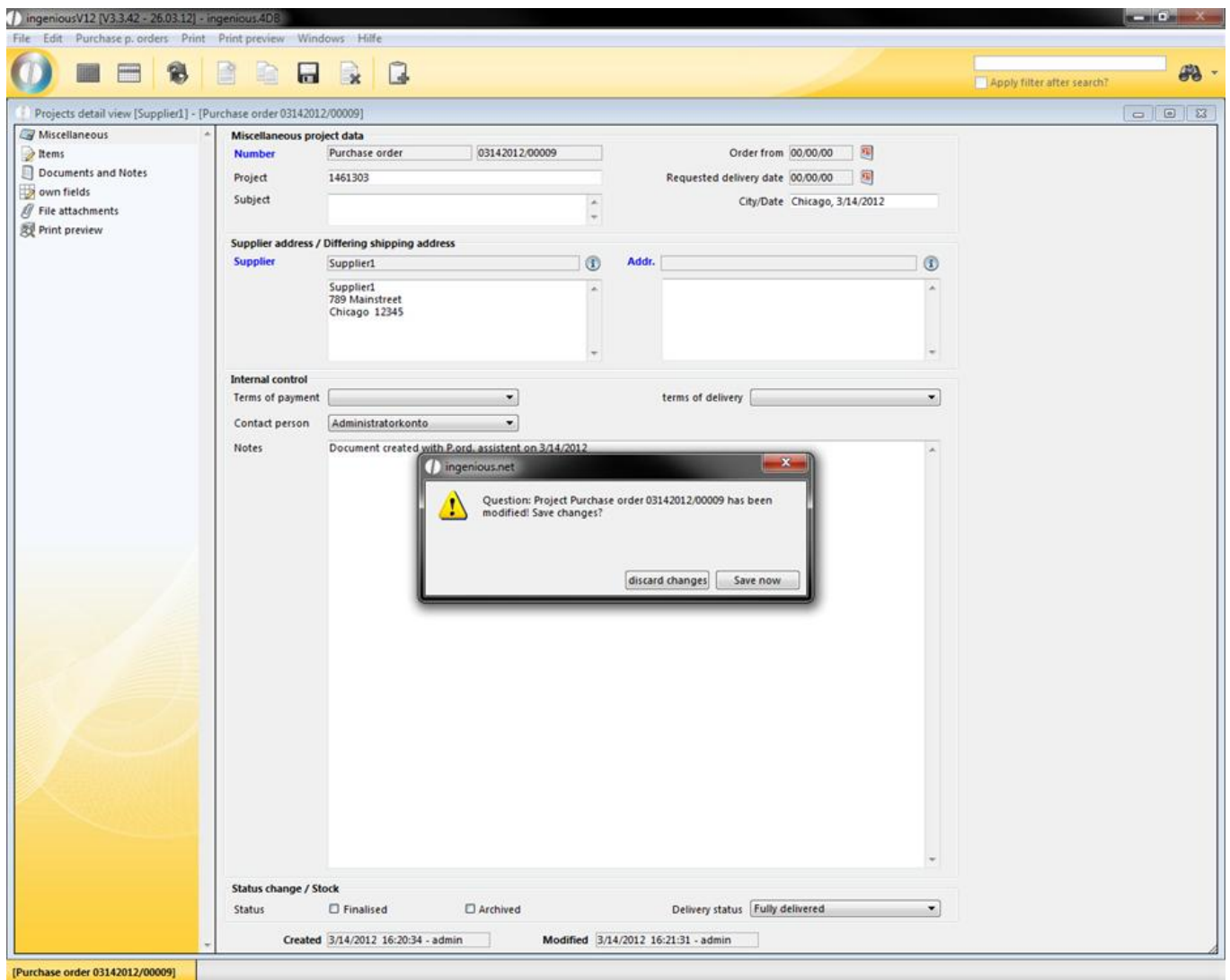
Within the data selection area of the items module, you will find product texts in the area "Product Texts." In the "Parameter" area, you can store financial accounting and product classification details. In the "own Fields" area, you have the possibility to make individual comments about a product under "File attachments" where you can organize, centrally manage and save important external documents of individual products. With the "Stock Monitor" and "Orderparameters" areas, you have an overview of the current status of your inventory and you can also leave the automatic inventory management to Ingenious.V12. In the file "Prices", you can secure the purchase price (PP), the first (SP 1) and the second purchase price (SP 2).

In the selling, production, logistics and invoice modules, you will find the following data selection range. This consists of the "Miscellaneous" field in which all general project data, invoice and delivery addresses, internal controls and the status of projects are contained. When you select the "Items" area, then a preset table and header and footer are available for the easy creation of quotes or cost estimates. With the "Times" area, you can accurately plan the manufacture or the installation of a product. In the "Parameter" area, all documents and anticipated payments that have accrued in a project are available. Aside from that, this area consists of pricing for the respective project. In the "own Fields" area, you have the possibility to make individual comments regarding a project, and under the "File attachment" area, important external documents of individual projects can be filed, centrally managed and saved. The "Print Preview" area consists of the Ingenious.V12 text processing for the fast creation of documents.

The data selection range in the "Purchasing" module, consists again of other areas. The "Miscellaneous" area displays the general project data, invoice and delivery addresses, internal controls and the status of projects. In the "Items" area, you will find a preset table and header and footer for the easy creation of an order. In the "Individual Fields" area, you have the possibility to make individual comments about a purchase order, and in the "File attachment" area, important external documents of individual orders can be assigned, centrally managed and filed. The "Print Preview" area also consists of Ingenious.V12 text processing.

Switch to the list view

In order to switch between the detail view to the list view, a right click of the mouse on the  button of the detail window is sufficient. Afterwards you will be asked if you want to accept the data.



Confirmation Window Overview

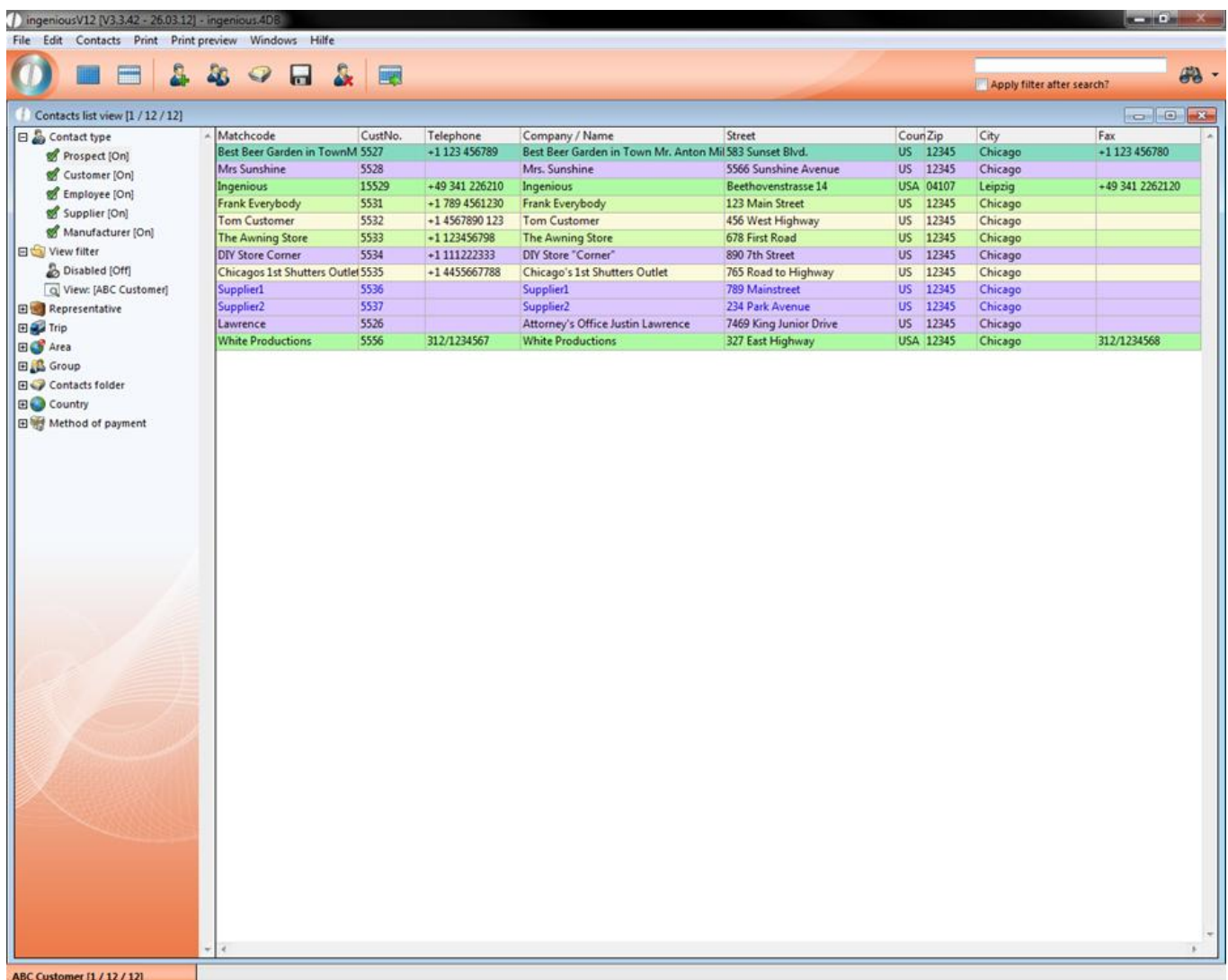
3 Main modules

3.1 Contacts

3.1.1 The contacts list view

3.1.1.1 The contacts list view

When you open the "Contacts" module in the main menu, the following window is displayed. In the list view, the contacts are displayed in different colors: blue = suppliers, black = customers, gray = blocked contact.



Initial view of the contacts module

The title bar of the module window

All 12 sample records are displayed. One identifies this in the title bar of the module window.

This shows you to which module this window belongs, which view is active and how many records are selected at once. The number of the active records is shown in parenthesis. In our example this is: (12/12). This means that 12 records are found in your database and that also 12 records are shown. The formula is easy to understand: (Number

of active indicated records / Number of all records)

The icon bar of the module window

You will find the icon view under the title bar.

In the icon bar, the fast search is provided and the buttons for the detail search as well as other diverse module-dependent buttons.



With this button you can retrieve all records



With this button you only retrieve selected records



With this button you insert a new contacts



With this button you duplicate the selected records



With this button you reassign the selected records to a contacts file



With this button you save the changes to the records



With this button you delete the selected record

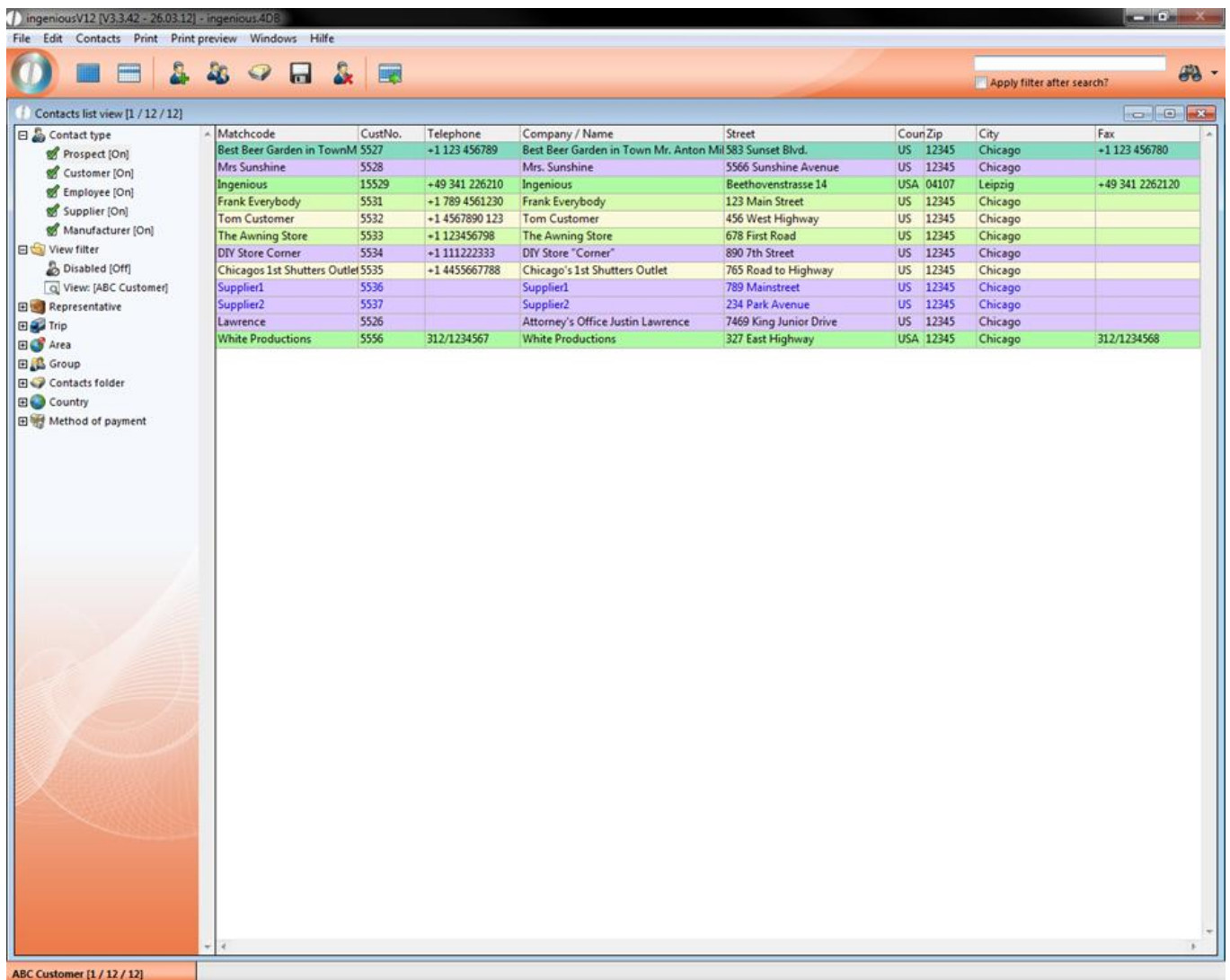



With this button you can export your contact list to excel

Ingenious.V12 quotations you its large selection of presorting. This way you can sort by clicking on the corresponding icon for contacts type, region, group, country, the representative's route or the payment type, for example.

Practice sorting and retrieving records


1. Retrieve all records with the  "List all contacts" button.

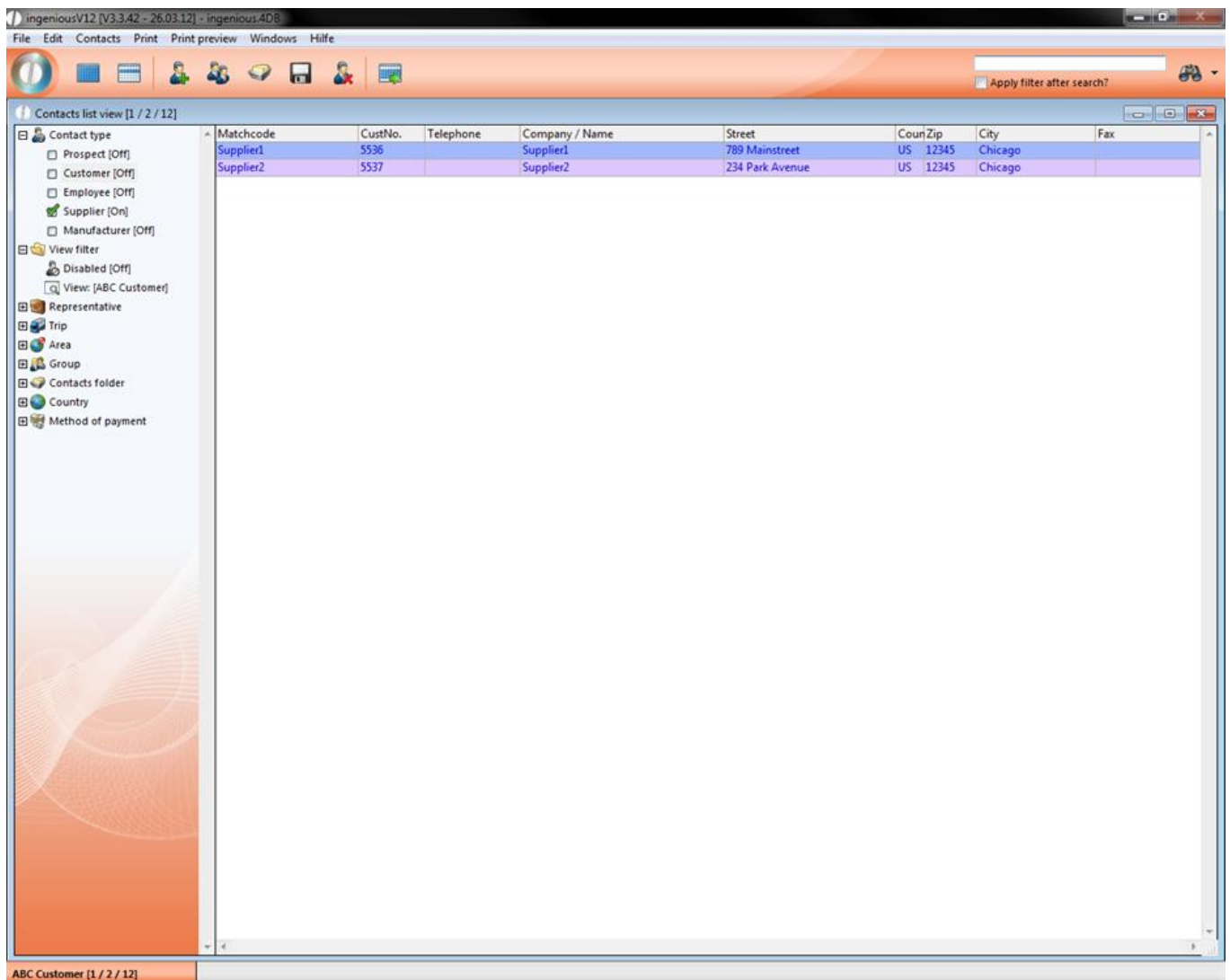


2. In the left area of the module window that contains the icons for presorting, you will uncheck all filter except for "Customer" and click the  button

Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568

Now there are only 10 to 12 records to be seen.

3. Now uncheck "Customer", check "Supplier" and click the  button in order to display all suppliers. Two records will be shown.



4. In order to sort the records for example according to "Contacts Nr.", simply click on the corresponding column head in the list view (right). The records are sorted in descending order. If you click on the column head again, the records are sorted in ascending order.

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File Edit Contacts Print Print preview Windows Hilfe

Apply filter after search?


Contacts list view [1 / 10 / 12]

Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mi	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120

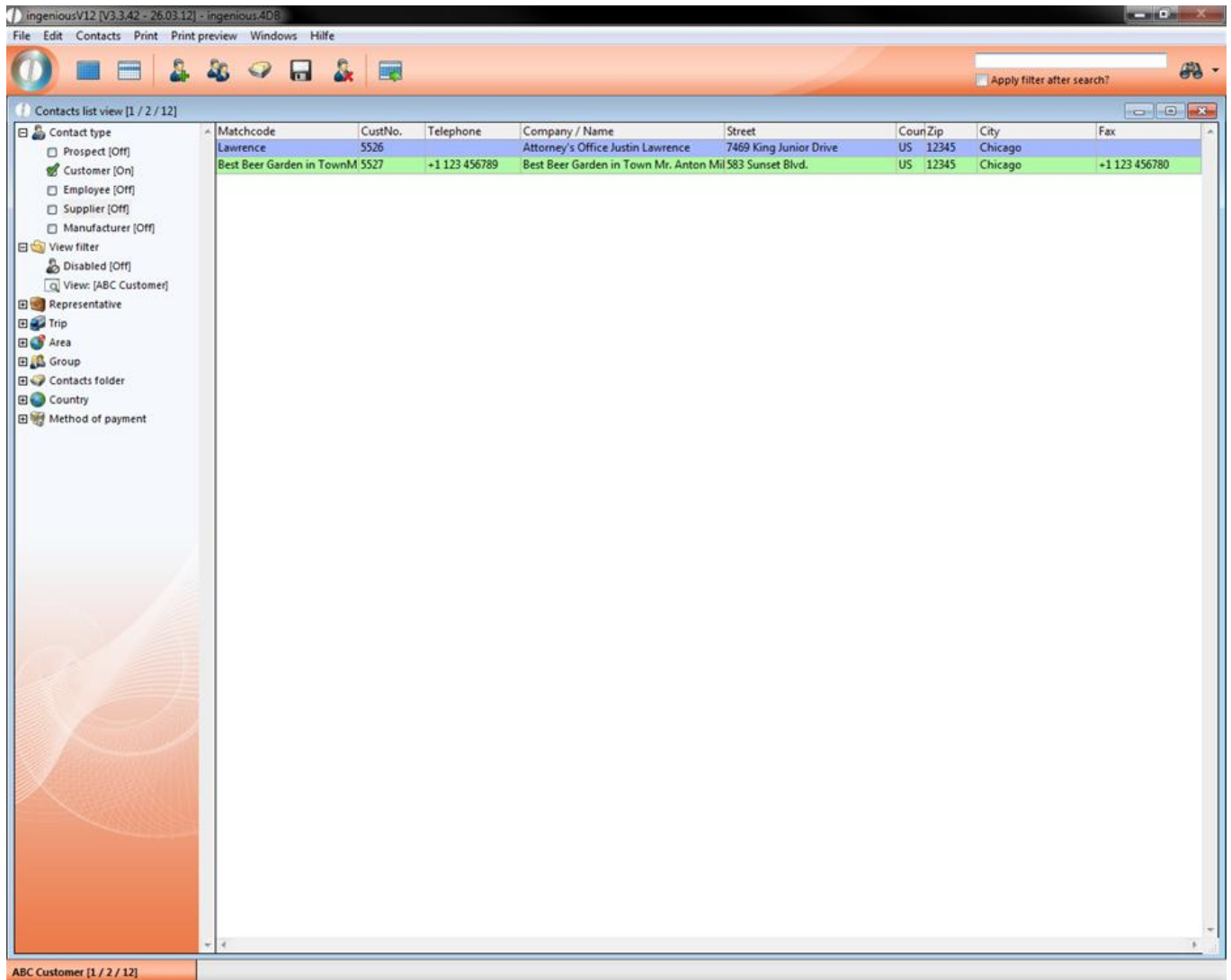
ABC Customer [1 / 10 / 12]


5. If you would like to sort the records by city then you only need to click on the column header "City".

6. Now select the records "Lawrence" and "Best Beer Garden in Town" with your mouse.

7. In order for only these records to be displayed, click on the button  "List selected contacts".

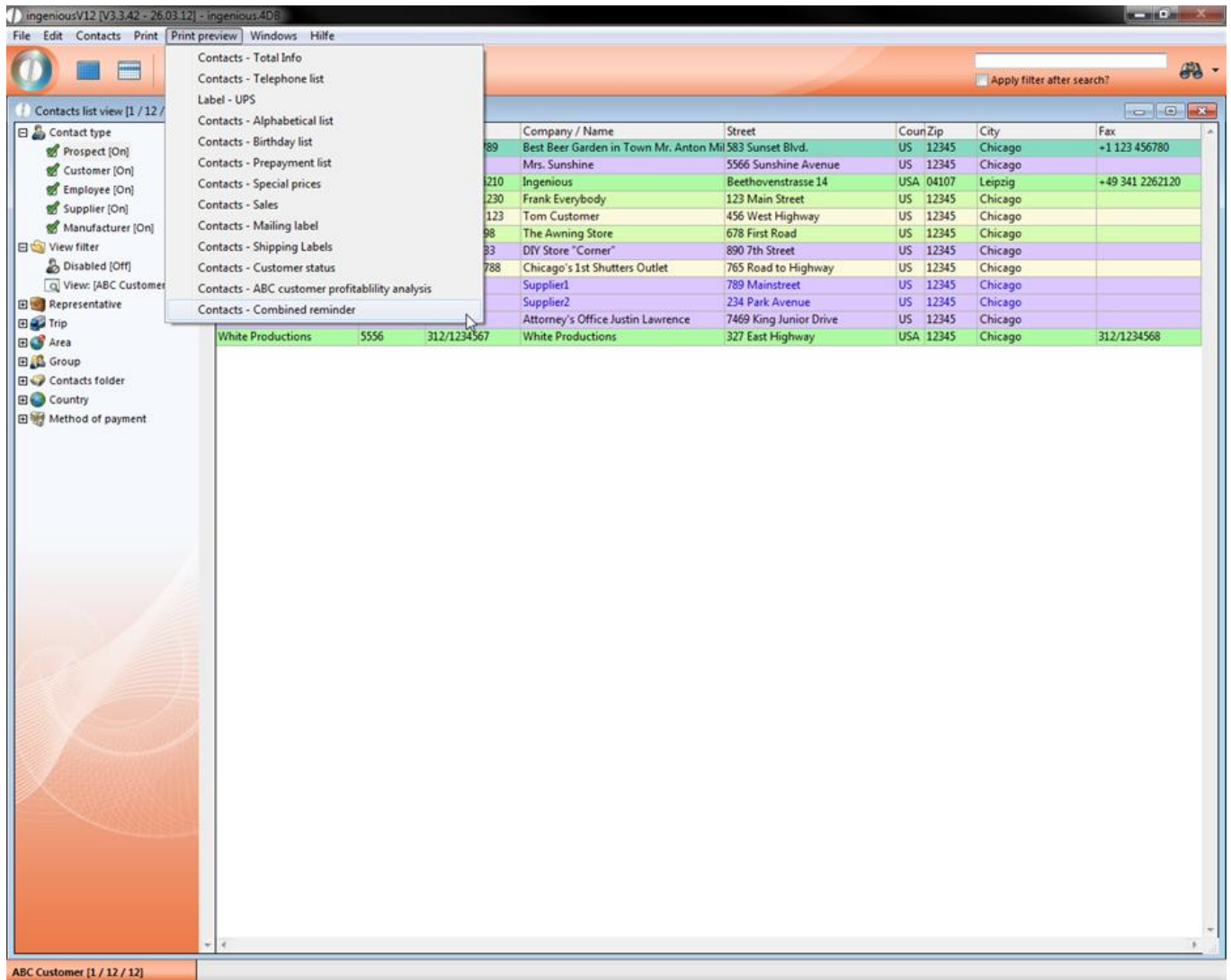
The module window appears as follows:



8. To display all records, just click on the button "List all contacts"  in the icon bar.

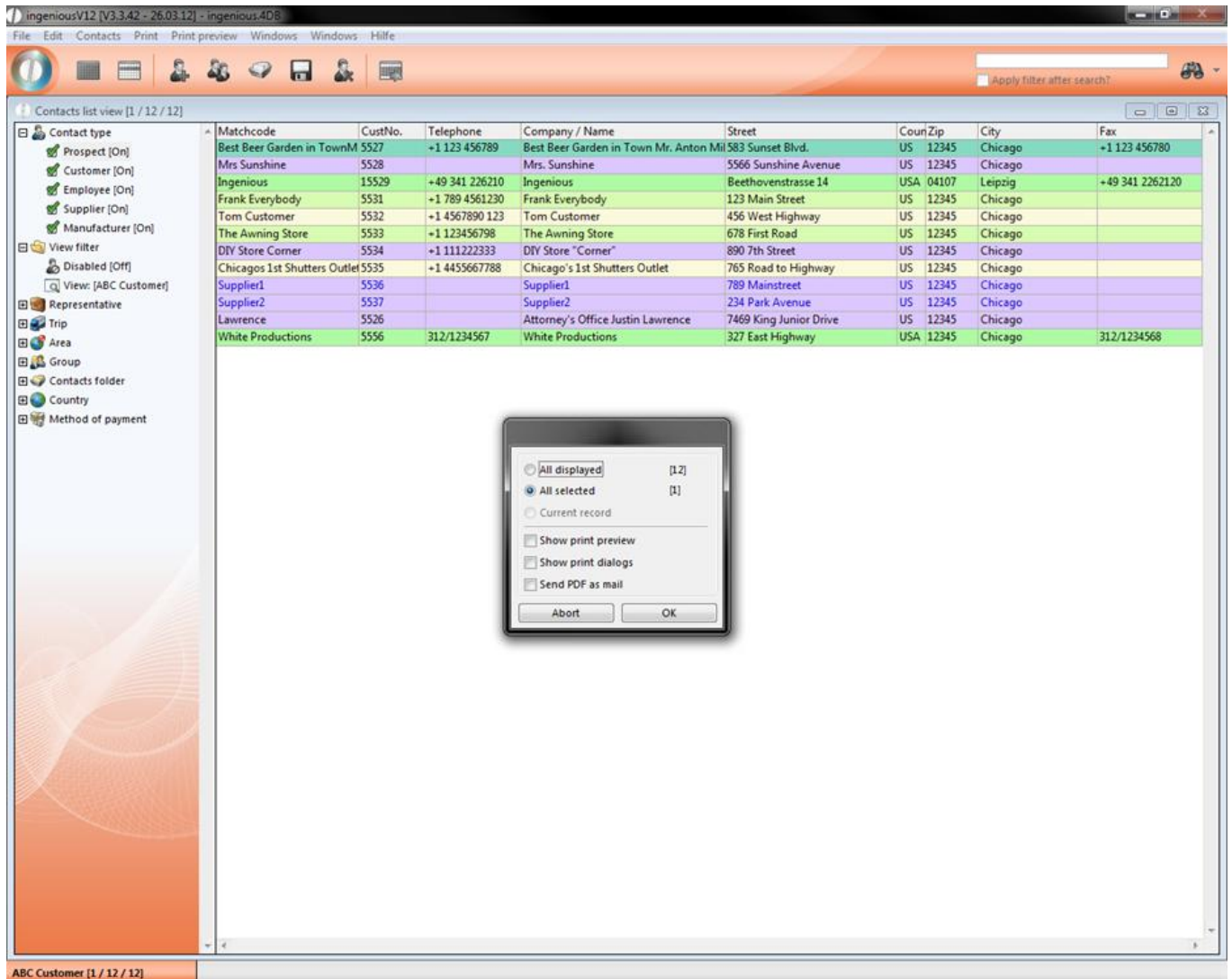
3.1.1.2 Printing contacts lists

Under the menu option "Print" in the main window of Ingenious.V12, you will find different print lists. Among them are "Simple lists" such as the "Alphabetical list", for example. With their assistance, you can print the selected contacts records in alphabetical order. Here you will also find lists with complex integrated functionalities that not only print data, but that process and edit them beforehand according to the set target. These are the "Complex lists", such as the "ABC contacts profitability analysis", for example.



Simple lists

The printing of data is still essential today. Therefore Ingenious.V12 quotations a range of possibilities that handle this quickly and easily. You only have to click on the menu bar on the menu item "Print" or "Print preview" and select the desired printing preferences from the pop-up menu. All printing reports in the global settings are only optionally selected as advanced and customizable.



After you have selected a menu item, another window appears in which, among other things, the number of records to be printed can be selected. Among all records, you have the choice to select (marked) records and the current record (this is only activated in the contacts detail view).

An example:

Practice printing records

1. With the  button retrieve all contacts.

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File Edit Contacts Print Print preview Windows Hilfe

Apply filter after search?

Contacts list view [1 / 12 / 12]

Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Supplier1	5536		Supplier1	789 Mainstreet	US 12345	Chicago	
Supplier2	5537		Supplier2	234 Park Avenue	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568

ABC Customer [1 / 12 / 12]

2. Sort the records according to city. Click on the same title in the column header.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Contacts Print Print preview Windows Hilfe

Apply filter after search?

Contacts list view [1 / 12 / 12]

Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in Town	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Supplier1	5536		Supplier1	789 Mainstreet	US 12345	Chicago	
Supplier2	5537		Supplier2	234 Park Avenue	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120

ABC Customer [1 / 12 / 12]

3. Mark the first four records.

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File Edit Contacts Print Print preview Windows Hilfe

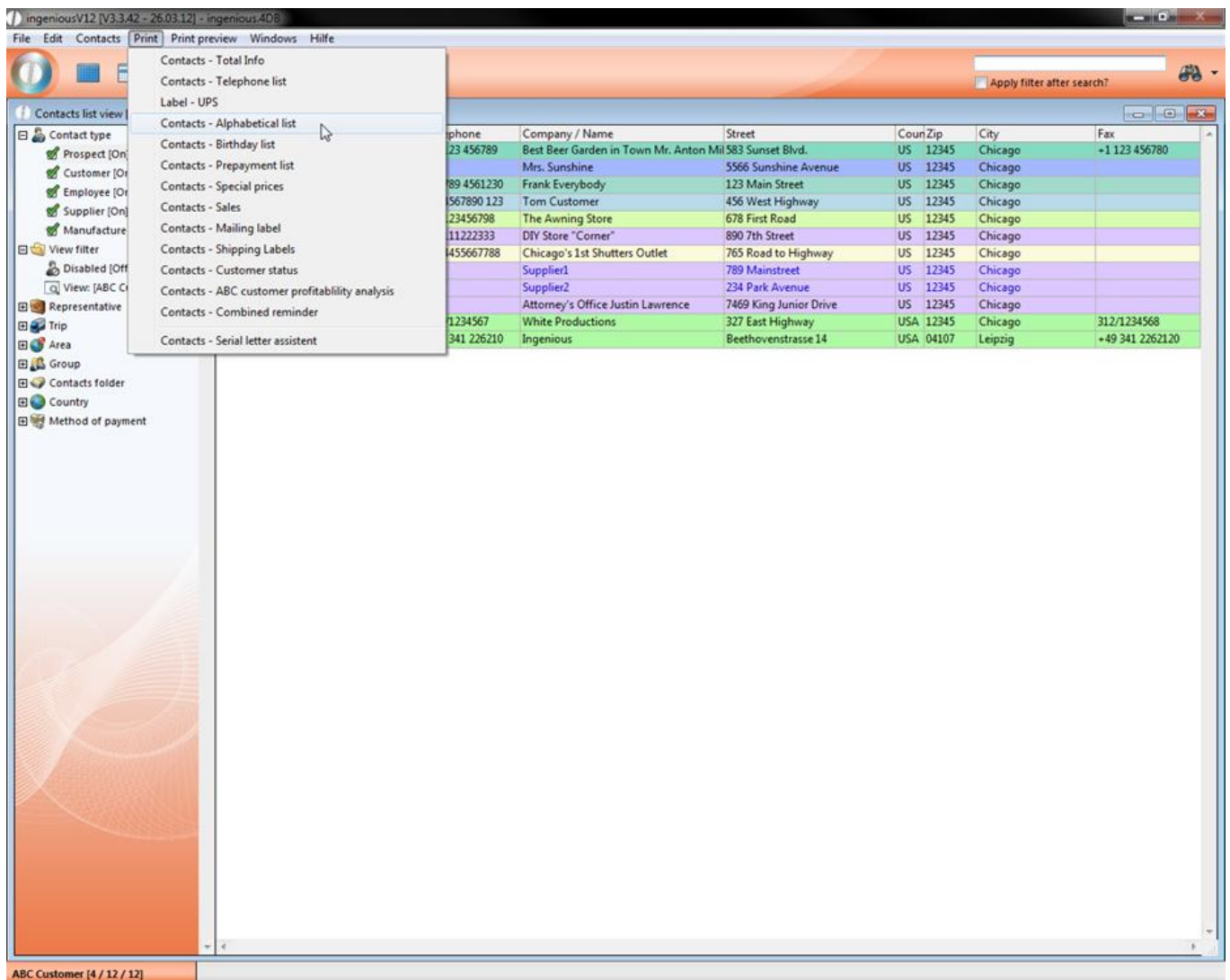
Apply filter after search?

Contacts list view [4 / 12 / 12]

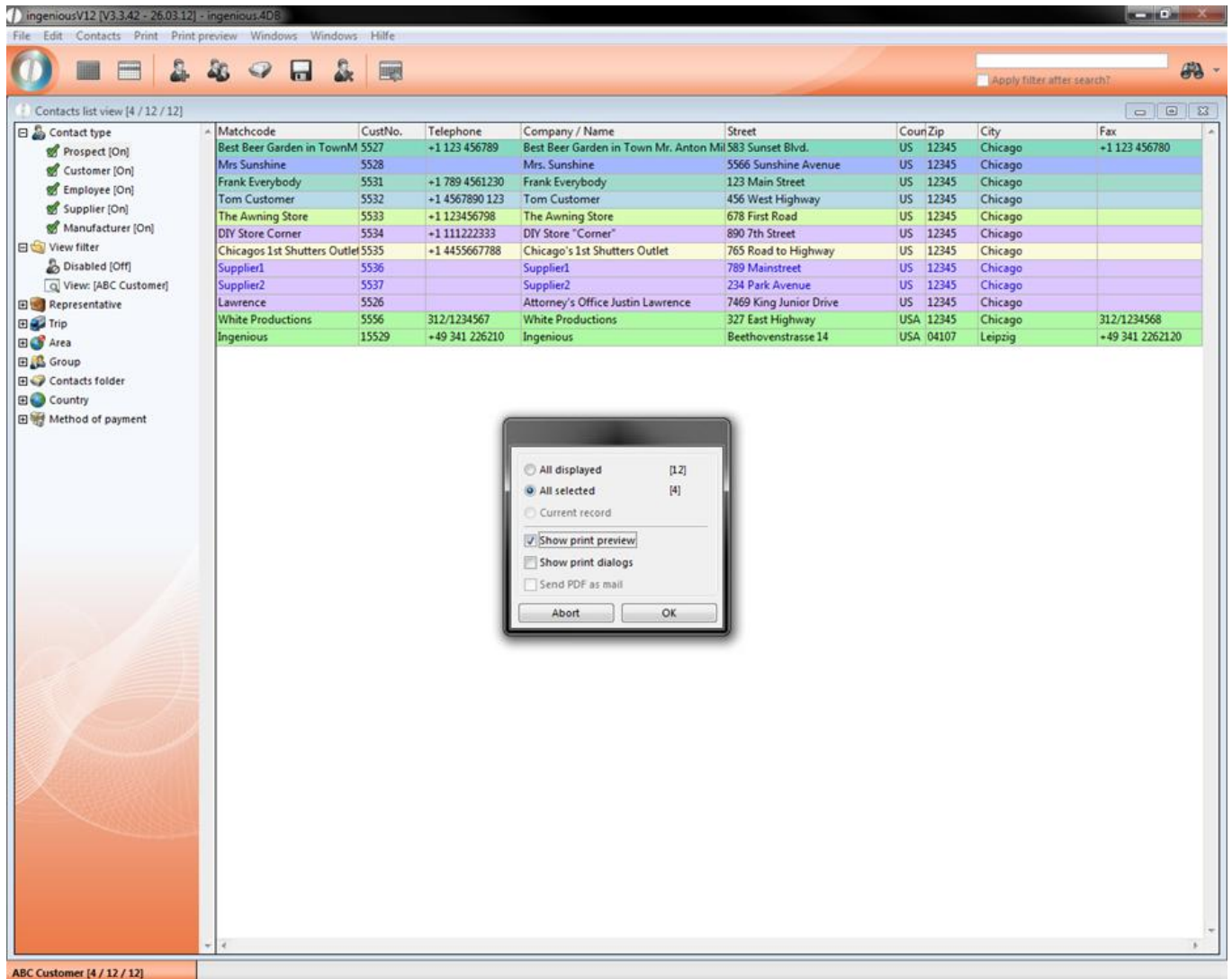
Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	Chicago	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	Chicago	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Supplier1	5536		Supplier1	789 Mainstreet	US 12345	Chicago	
Supplier2	5537		Supplier2	234 Park Avenue	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120

ABC Customer [4 / 12 / 12]

4. Select "Print" from the main menu and select the entry "Contacts - Alphabetical List".



Now you see the following monitor.



5. Select the setting "All selected" and "Show print preview".

If you select the option "All displayed (12)", then all 12 records will be printed alphabetically. With the option "All selected (4)", then only those records that you selected will be printed. The checkmark next to "Show print preview" means that you will first see a page view. Click on "OK". A new window with the print preview will appear.

Print Preview

Alphabetical list

Matr.no.	Cust.No.	Name	Contact person	Street	ZIP	City	Telephone	Fax
Awing Side	0533	The Awing Side		678 First Road	12345	Chicago		
Best	0527	Best Beer Garden & Tavern Mr. Andy Miller		983 Grand Blvd.	12345	Chicago		
Crabber	0532	Tom Crabber		456 West Highway	12345	Chicago		
Bennybody	0531	Frank Bennybody		123 Main Street	12345	Chicago		
Great One	0520	Mr. Great One		0006 Great One Avenue	12345	Chicago		

Window with the page view of the printing job

In the upper left corner, you will find the following buttons:



This button closes the window



This icon prints the pictured page(s)



When you update this button, the previous page will be displayed. In case there is no previous page, then it is inactive (grey display)



The next page is displayed with the help of this symbol.



This button increases or minimizes the page layout.

6. Click on the button to print the records

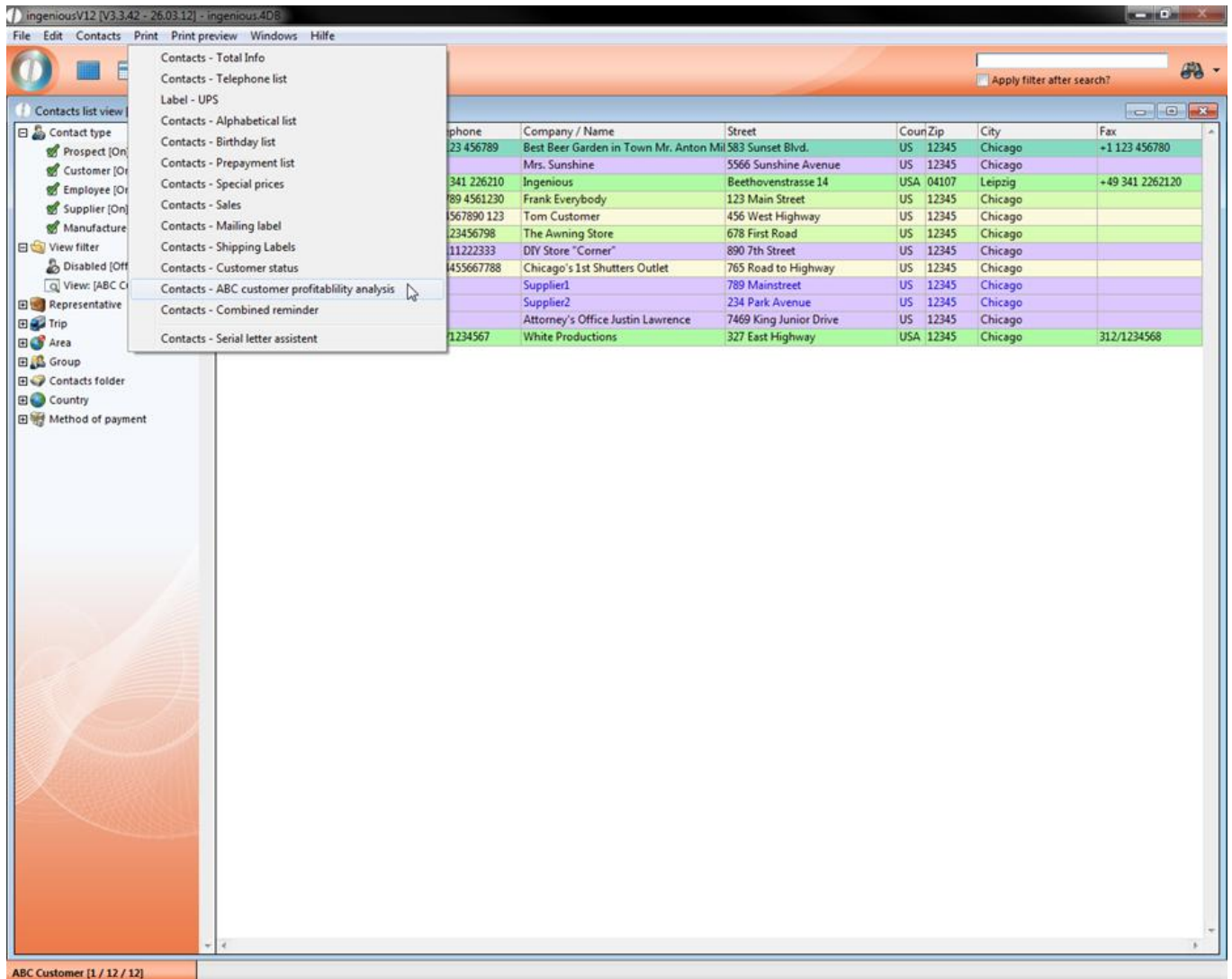
The list will be sent to the initialized printer.

Complex lists

In the "Print" menu of the complex lists, you will find the "ABC contact analysis". This list analyses your best customers for you and gives you the overview of their sales volume for this year as compared to last year. With the help of this list, you can then for example, decide on the quotations for rebates, special prices or incentives. In order to conduct an ABC analysis of the 10 best clients, please proceed as follows:

Practice with ABC contacts profitability analysis

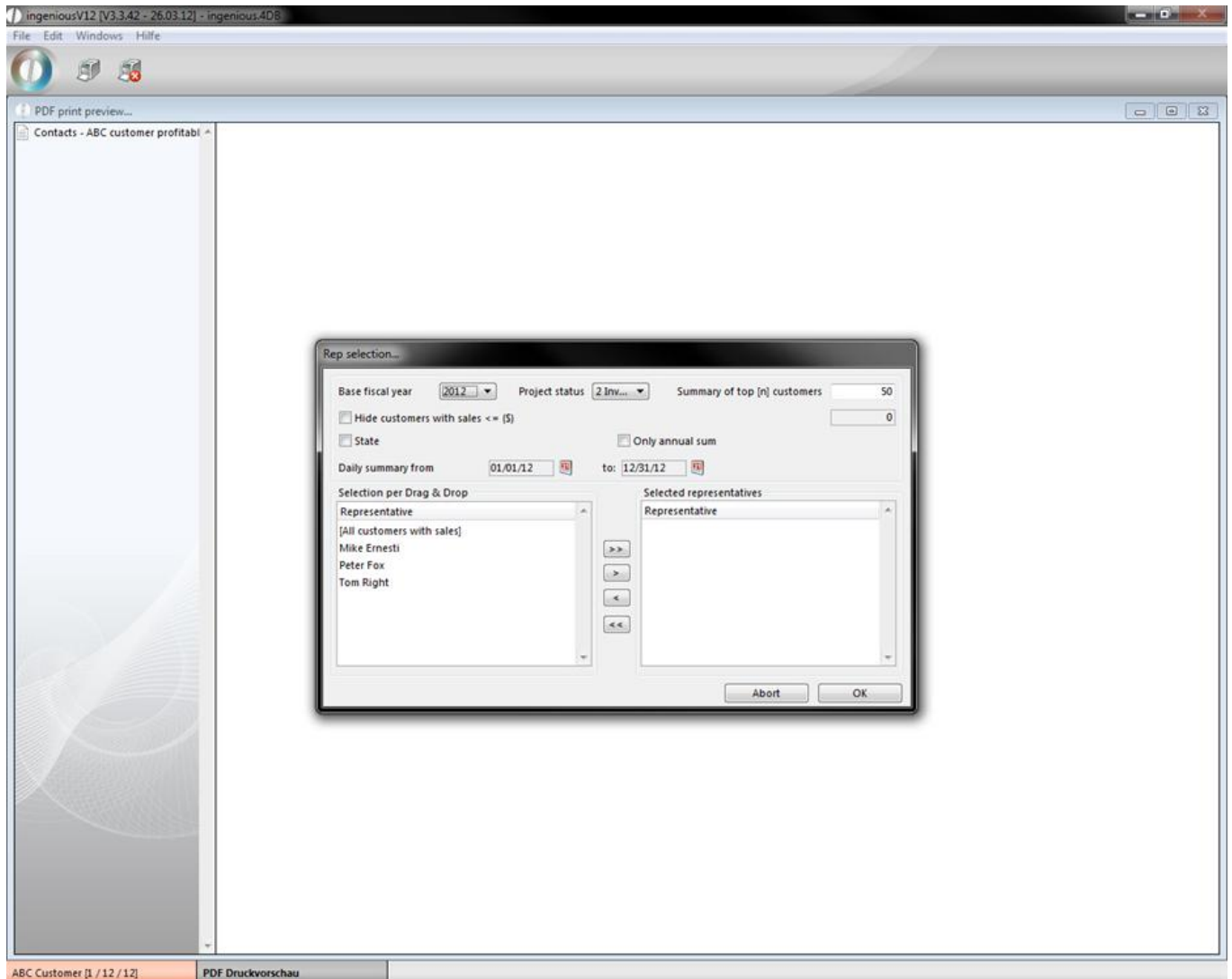
1. First retrieve all of your contacts with the  button.
2. Afterwards, select the menu item "Print/Contacts - ABC contact profitability analysis".



A window will appear where you can do a query for the number of records for the ABC analysis.

3. Click here on "All displayed" and confirm with the "OK" button.

In the window displayed, you have the opportunity to more closely define the contents of the ABC analysis. The base fiscal year of the analysis can be specified. In addition, you can enter how many contacts (up to max. 30,000) should be added to the complete list. You also have the possibility to determine a sales amount for the selected contacts, respectively contacts with fewer sales who are hidden.



ABC contact analysis setup

You can select whether the analysis for all contacts is to be provided, or only customers with one/several selected contact representatives (s). In order to create these settings, you must drag the desired representatives with the mouse from the left field ("Selection with Drag & Drop ") into the right field ("Representatives will be selected"). In order to analyze all contacts, you drag only the top line ("All contacts with sales") into the right field.

4. Select all contacts for the analysis and limit the number of the best contacts to "10". Then press the "OK" button to start the analysis.

Since the analysis must examine and compute the calculations of more than 100,000 contacts, this can take some time. However, you are always informed about the current status of the analysis. As soon as the analysis is finished, the resulting list appears.

ABC customer analysis by rep...

File Edit View Insert Style Tools Database

<

An example of a completed ABC contacts analysis

If you look more closely at the completed analysis, you will find all of the important information that is necessary for evaluating the change in sales of each contact. This way you can compare the individual monthly sales and the current (cumulated) annual sales with that of the previous year for all contact as well as for each individual contact. In addition, the finished analysis as well as the underlying color variation of the annual sales is available as a USD amount and as a percentage value. In the standard setting, the colors appear in the following scheme:

Annual sales turnover < 0 % Previous year sales turnover => RED

Annual sales turnover <= 3 % Previous year sales turnover => YELLOW

Annual sales turnover > 3 % Previous year sales turnover => GREEN

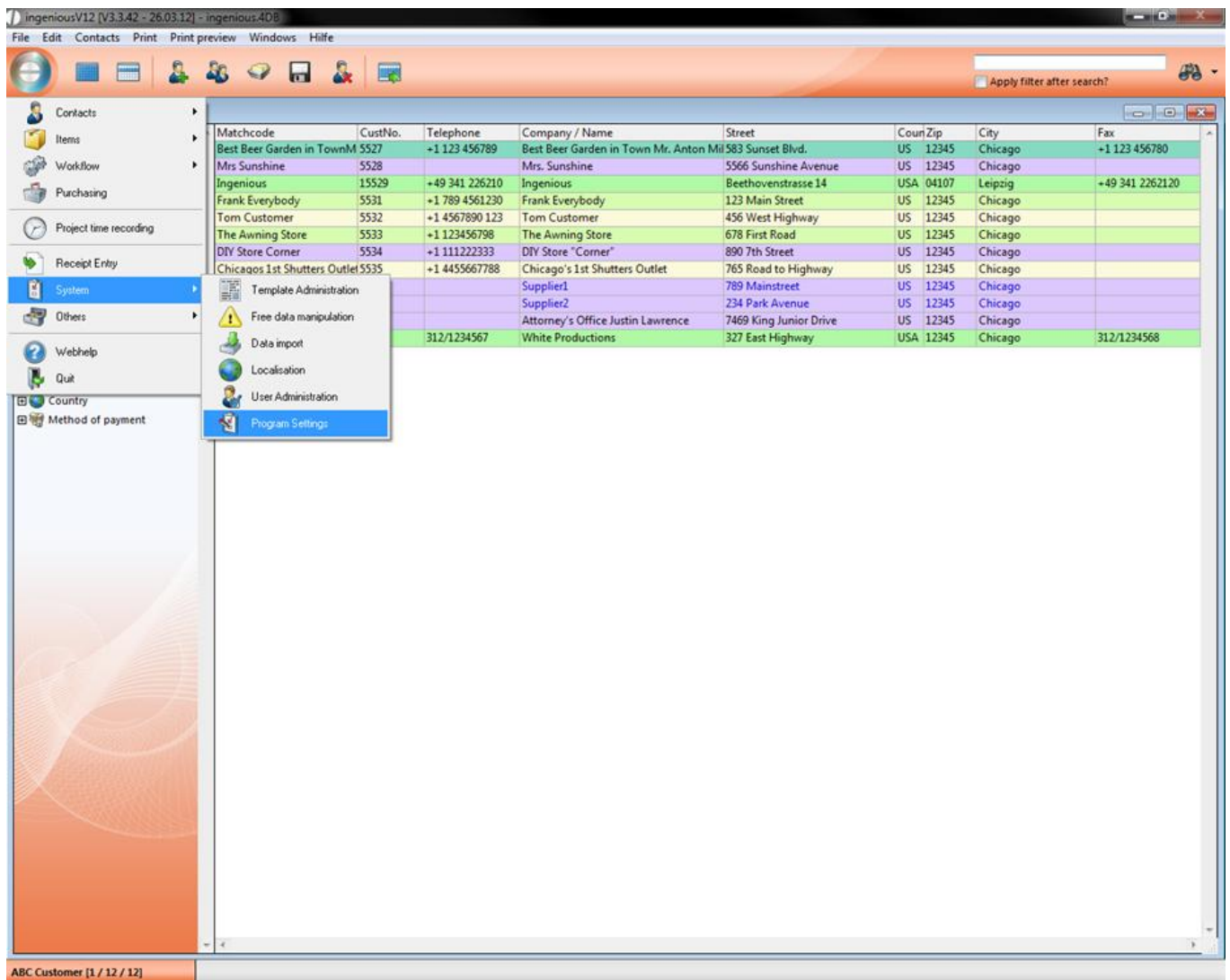
Individual color schemes can also be implemented.


Report „Contacts – Sales statistic“

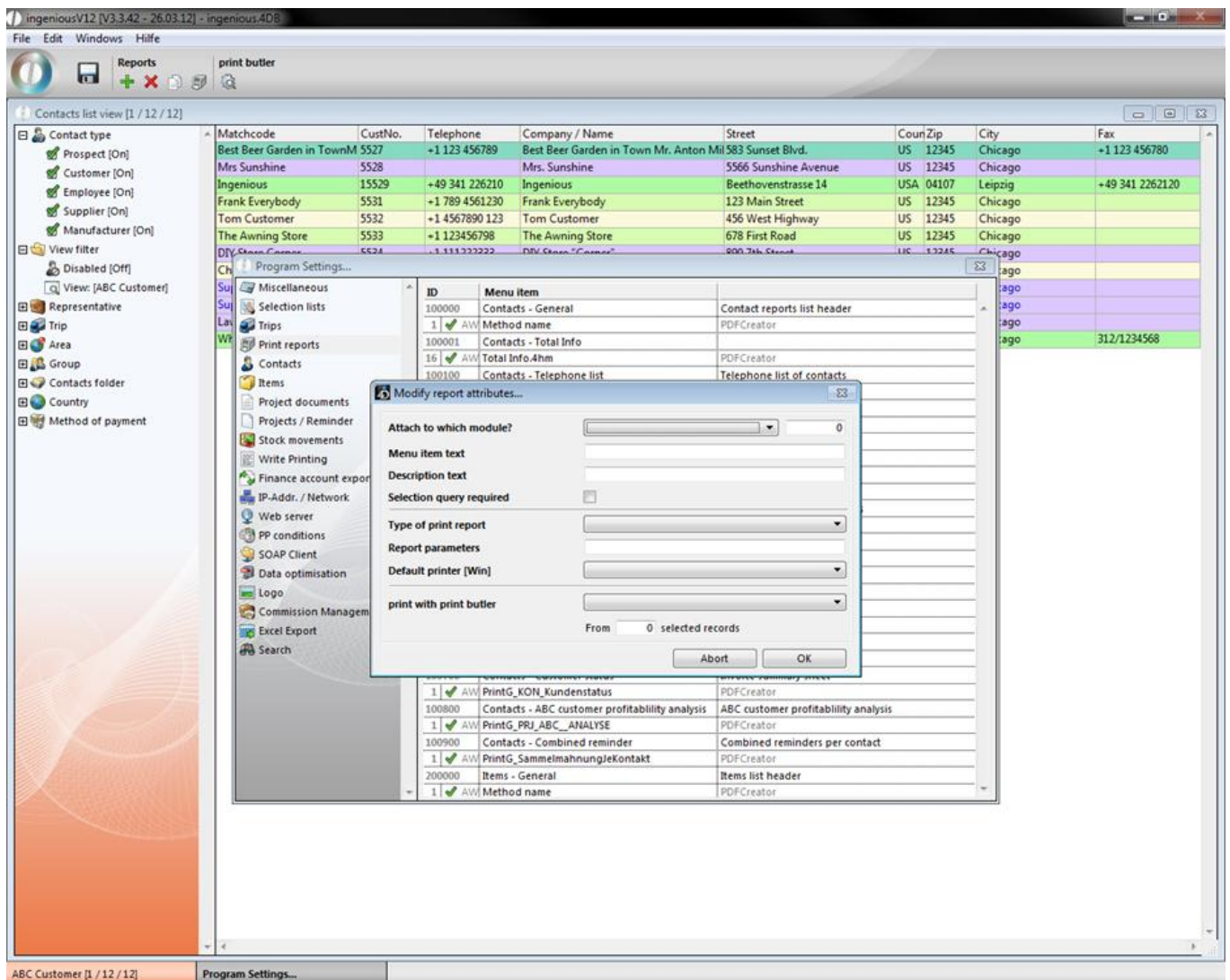
The report “Contacts – Sales statistic” is not included in the standard configuration of ingenious V12, but you can create it. He works similar to the “ABC contact profitability analysis” and lists the sales for specific contact groups in a time span, but it is more complex.

Create the report “Contacts – Sales statistic”

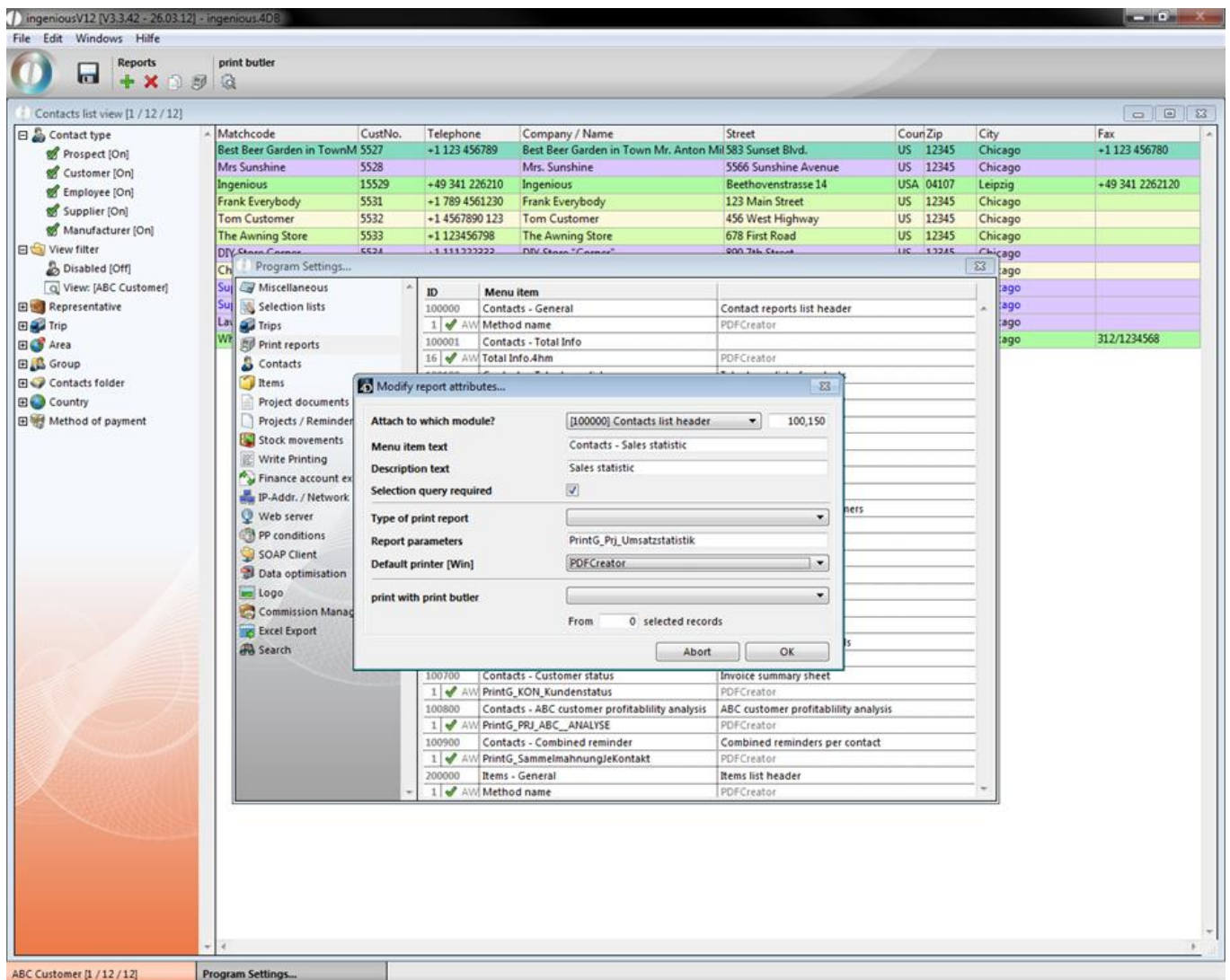
1. Open program settings



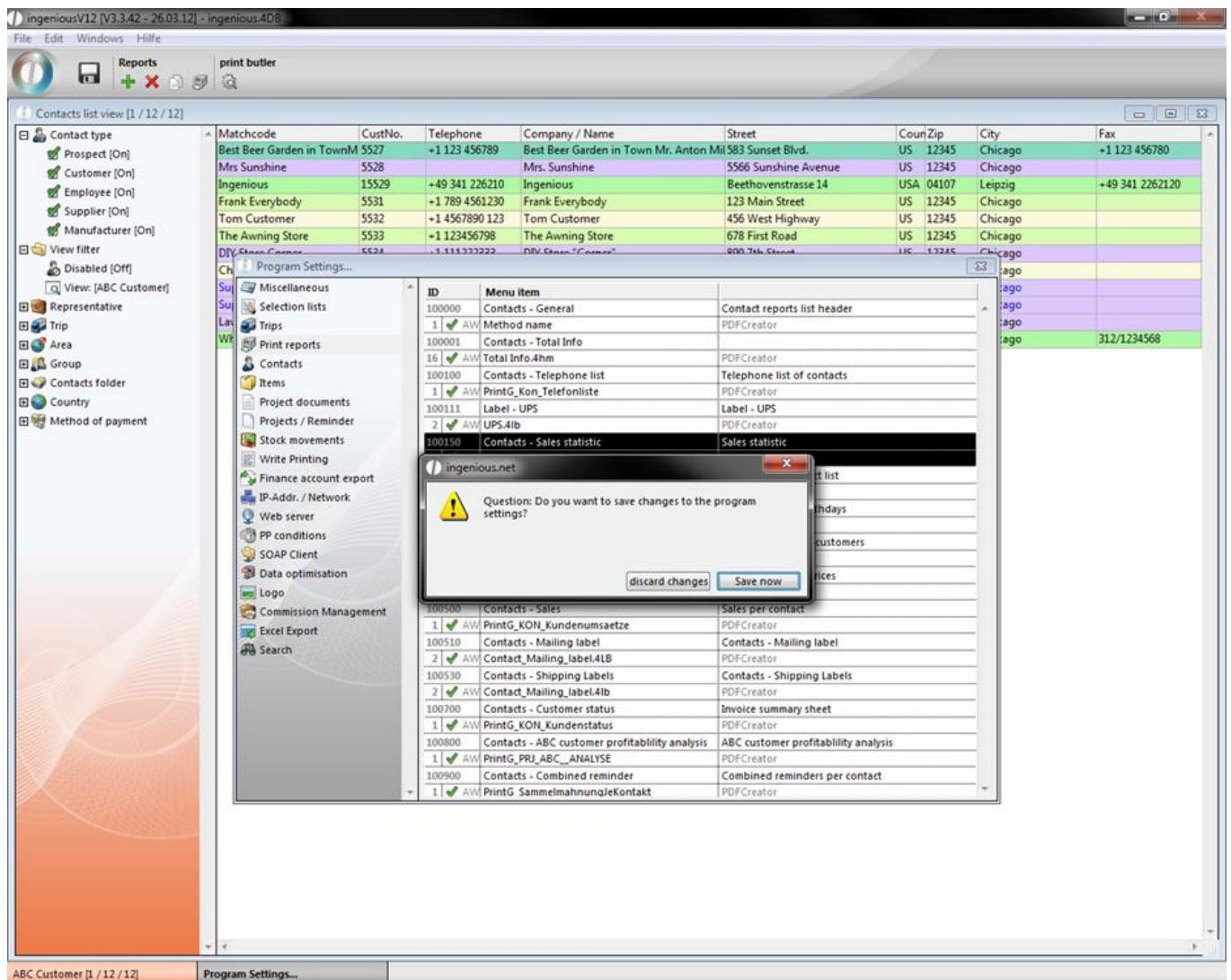
2. Choose "print report" in the left area and click on  in the icon bar



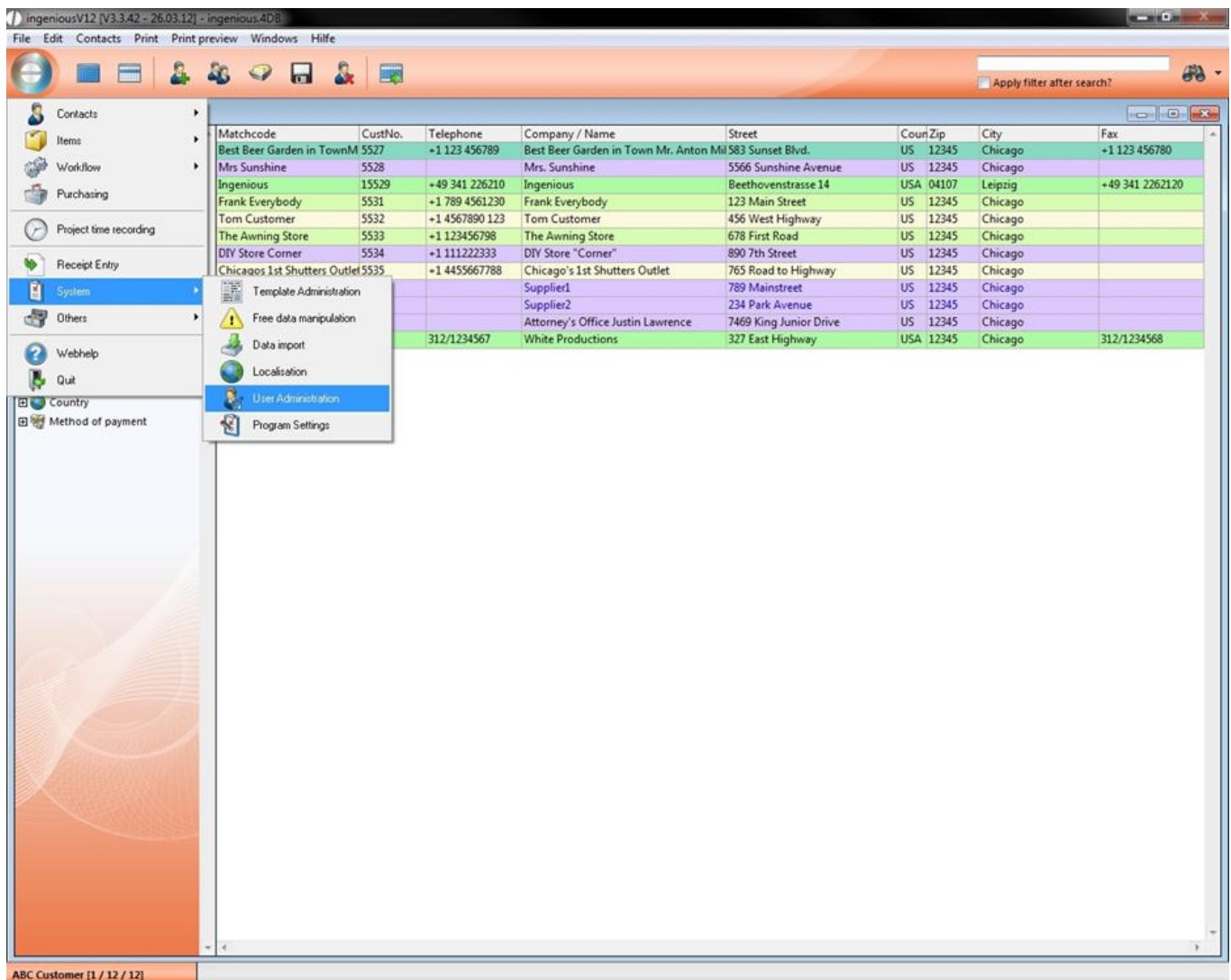
3. Fill in the data as shown in the next picture. It's important, that the report is connected to the contacts module, is named "Contacts – Sales statistic" and the value of report parameters is "PrintG_Prj_Umsatzstatistik"



4. Commit the dialog with OK and the new report will be shown in the list. Close the program settings und save the changes



5. To be able to use the report, you have to activate the specific report right in the user administration. Open up the user administration.



6. Choose the tab "Report rights" and activate with a double click the report right "[100150] Contacts – Sales statistic"
7. When you open the "Contacts" module, in the print menu you can find the new created report now. (hint: if you can't find it, just restart ingenious v12)
8. When you click on the report a window will open up where you can make various settings, to customize the sales statistic to your individual wishes.

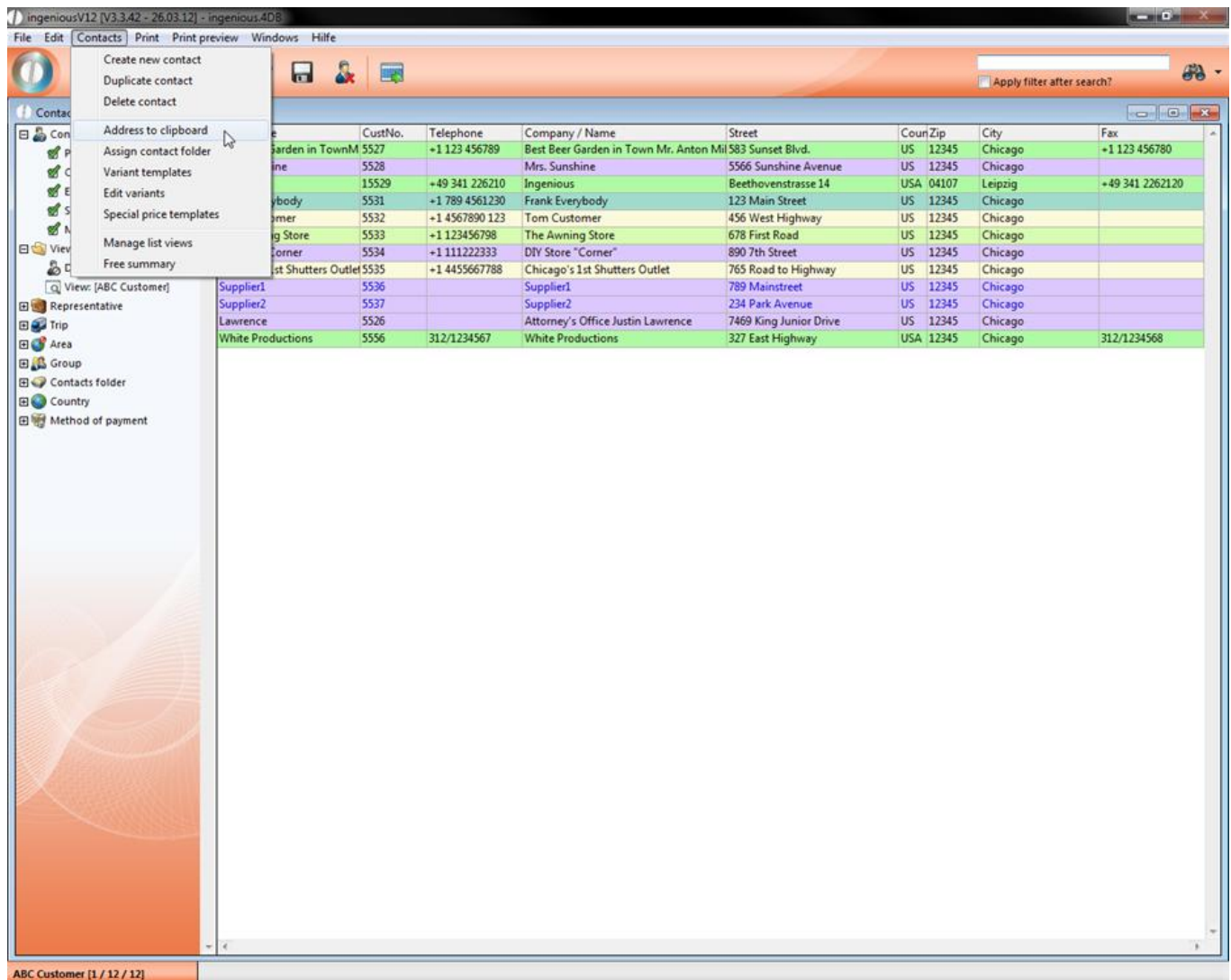
You can choose the regarded project state, time span, compression (CW, month, fiscal year), contact group of a customer number range (only possible if all customers have a numeric customer number), a assignment to a representative or an area, the selection best customer (or all) and the masking of customers having sales less than x. Furthermore you can set different colors for the ABC customers, by double clicking the color area. It is also possible to make subtotals and/or sales rep appointments visible. Likewise you can color new customers. By clicking "Show selection" relevant records will be listed in the contacts list. When you click the "OK" button the sales statistic will open up in an ingenious v12 table.

3.1.1.3 Contacts clipboard

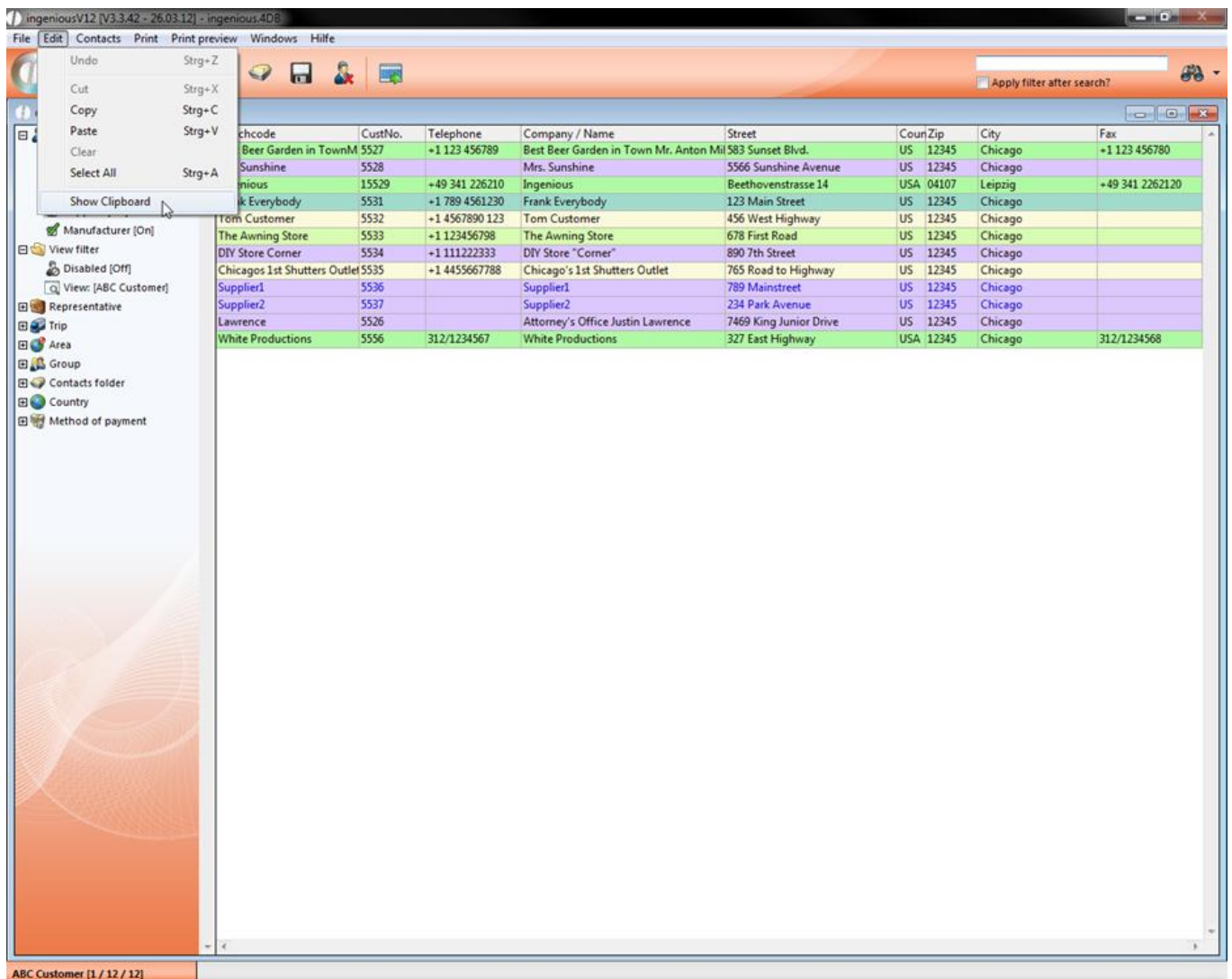
The menu item "Contacts/Addresses to clipboard" gives you the possibility to copy the contact addresses in the clipboard. From there, you can enter data in any field within Ingenious.V12 and/or in every other windows application. This is very fast and easy.

Practice with the clipboard

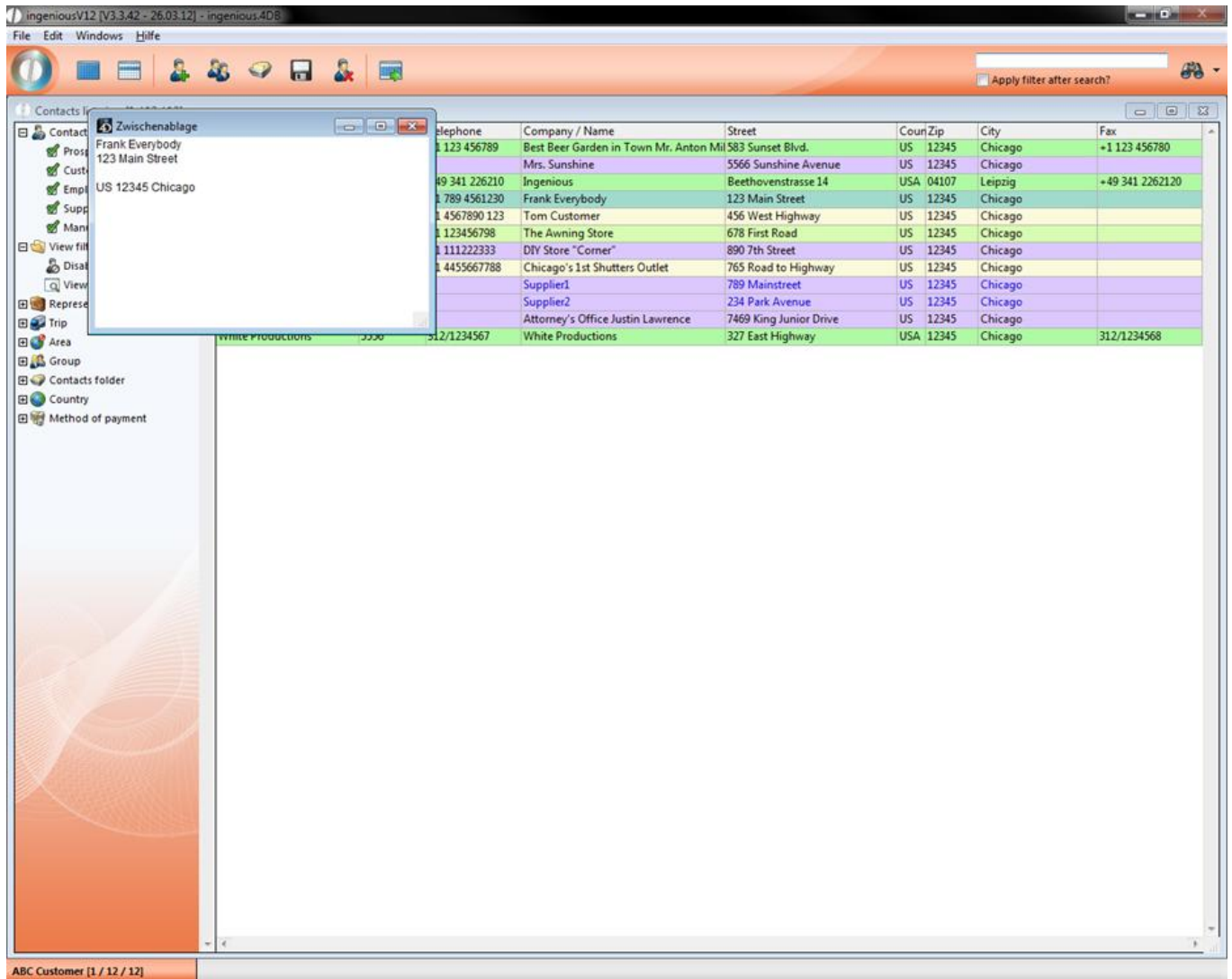
1. Select the contact with the customer number (CustNo.) "5531".
2. Select the menu item "Contacts/Addresses to clipboard"



3. To check if the data was really copied into the clipboard, select the menu item "Edit/Show clipboard".

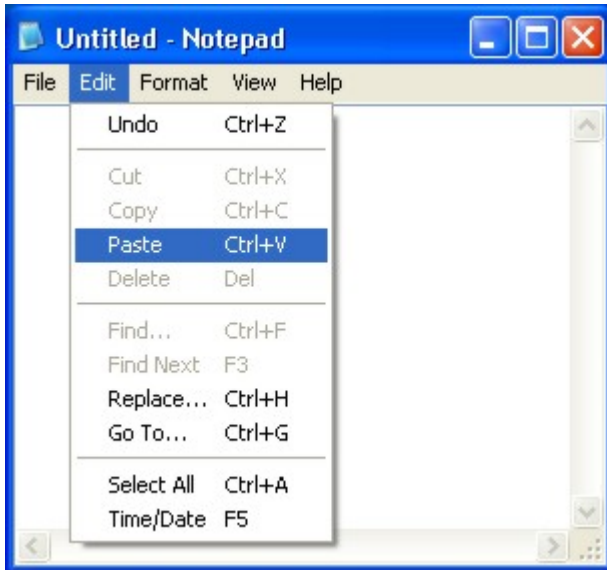


A window with the current clipboard content appears. As expected, the address and selected records are shown in the window. The data remains in the clipboard until you enter something new.



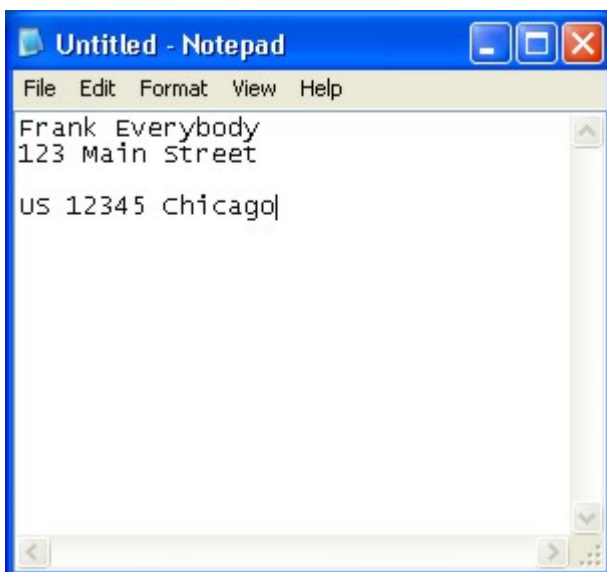
Tip: You also can work at any time in Ingenious.V12 with the well-known combination of keys Control + C (copy) and Control + X (cut) and Control + V (paste). In order to insert the data again into a text field, select the menu option in the target program "Modification/Entering" or the key combination Control + V.

4. "Start/Program/Accessories/Editor" from the Windows start menu in order to start the Windows text editor.
5. When the Windows Editor has started, select the menu option "Modification/Entering" in the menu bar.



Menu in the Windows Editor

The address data are entered in the Windows Editor and can be used further. This is very significant for the creation of individual mailings.



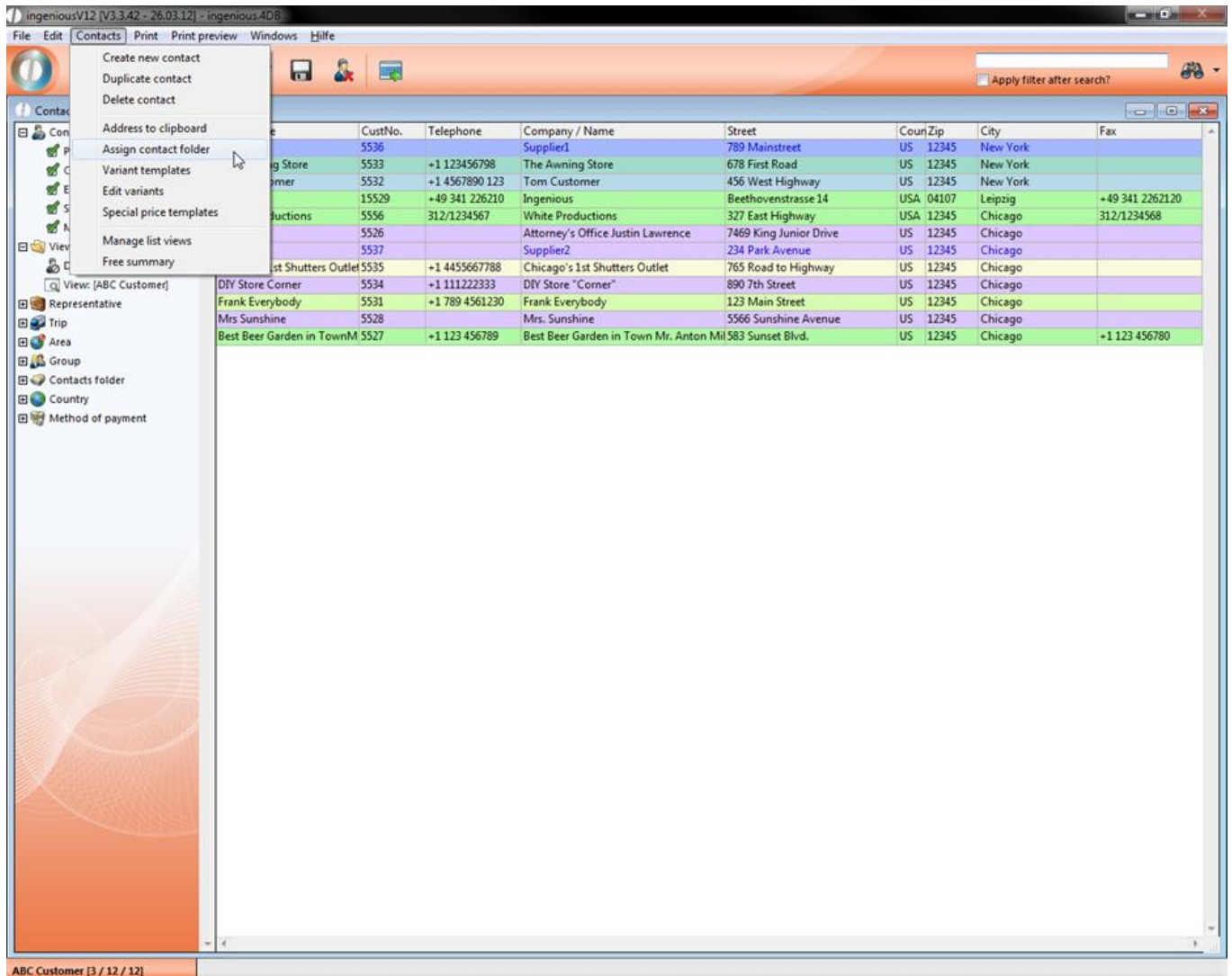
The entered address data in the Windows Editor


3.1.1.4 Contact file

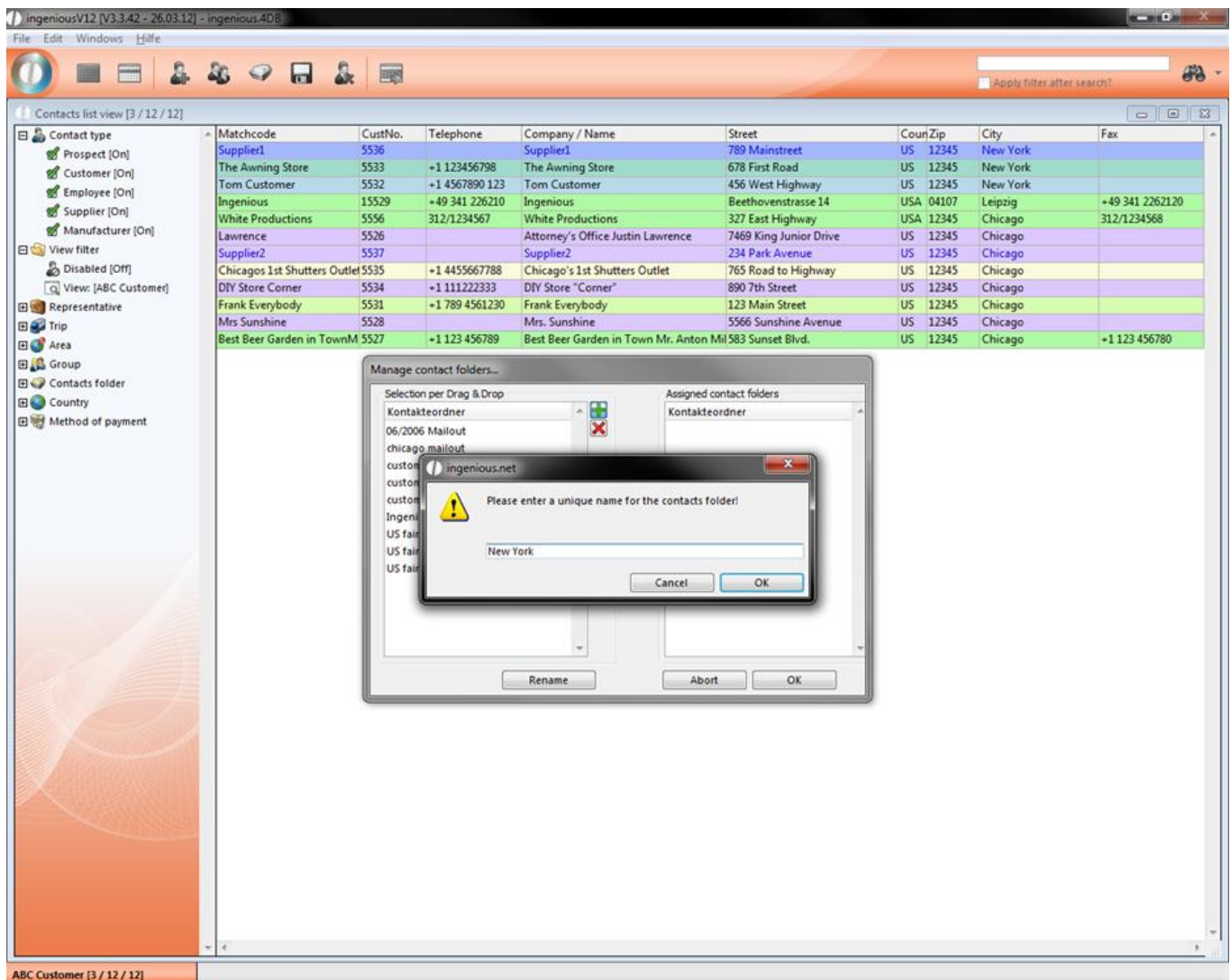
With the menu option "Assign Contact Folder" in the main menu, one can merge the different contacts into a single group.

Practice using the contact folder

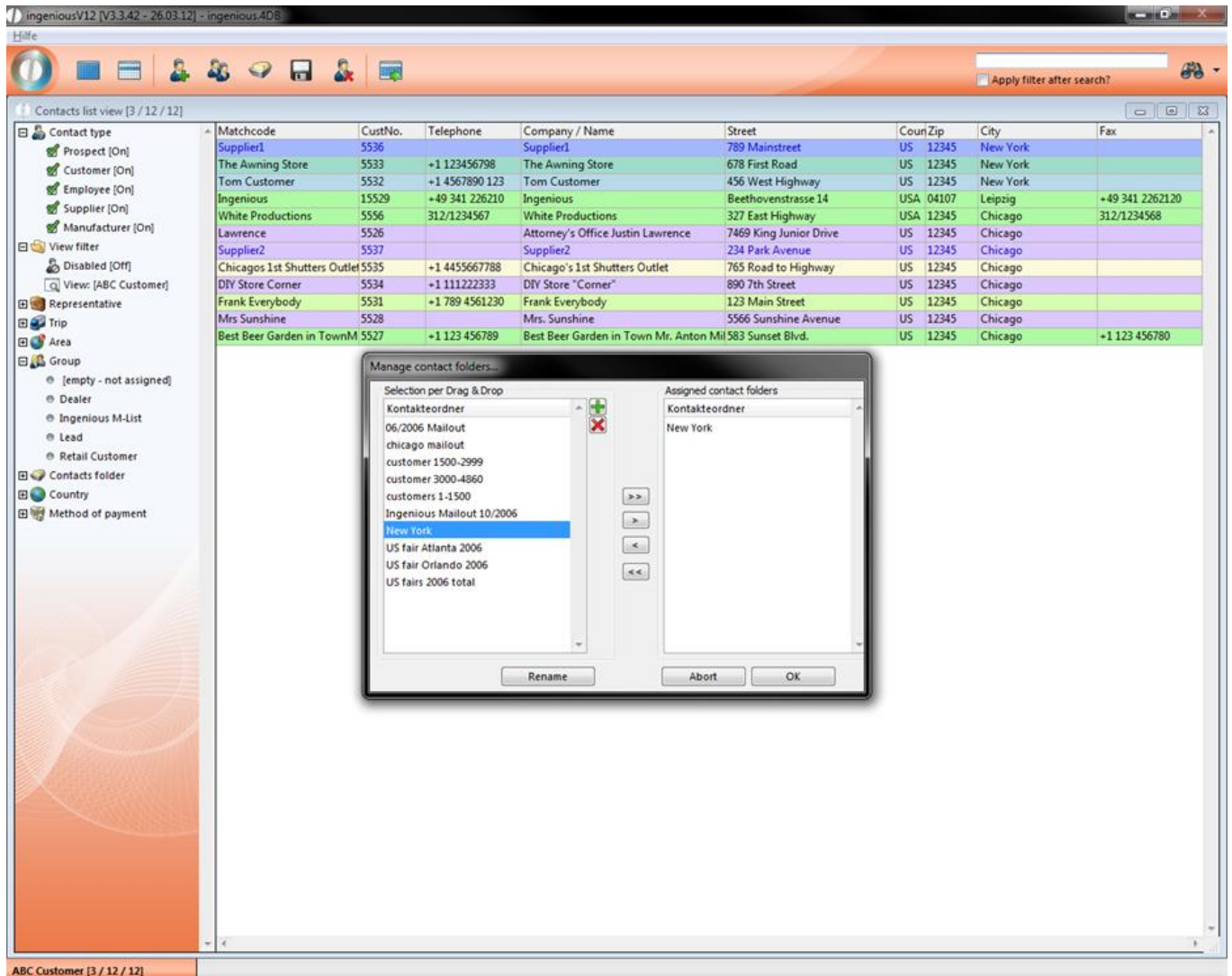
1. Select all records and file them according to city.
2. Mark all of them with the city "New York".
3. Select the menu option "Contacts/ Assign contact folders" from the main menu.



4. Start a new contact folder by clicking on the  button in the "Selection with Drag & Drop" area. Give the contact folder the name "New York" and confirm with "OK".

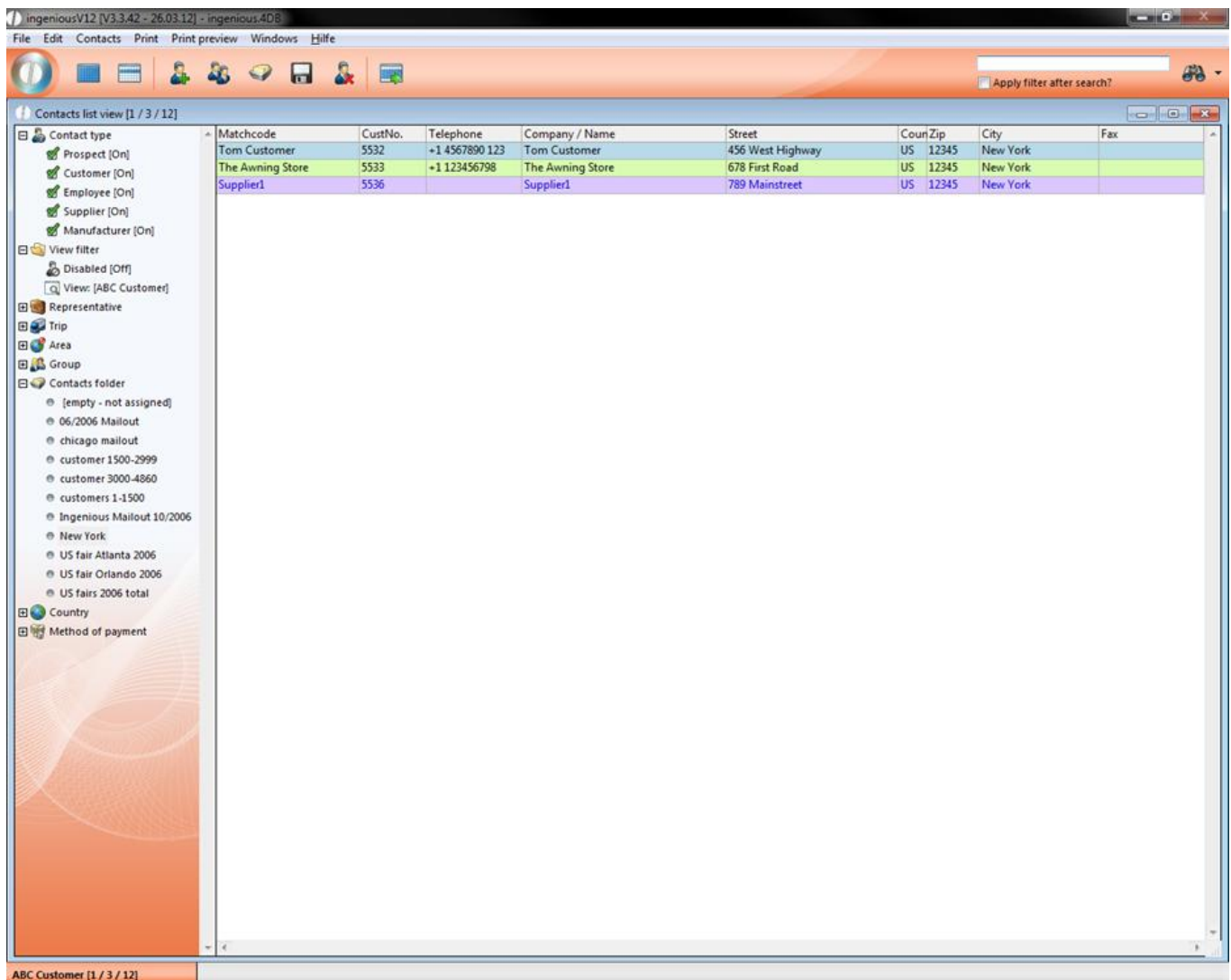


5. Now with your mouse drag the newly created entry "New York" from the left area of the window to the right area. The entry will be listed on both sides.



6. Click on the "OK" button.

In the contact folder, "New York" all records (3/12) from the location New York are grouped and can be used in targeted marketing measures, for example.

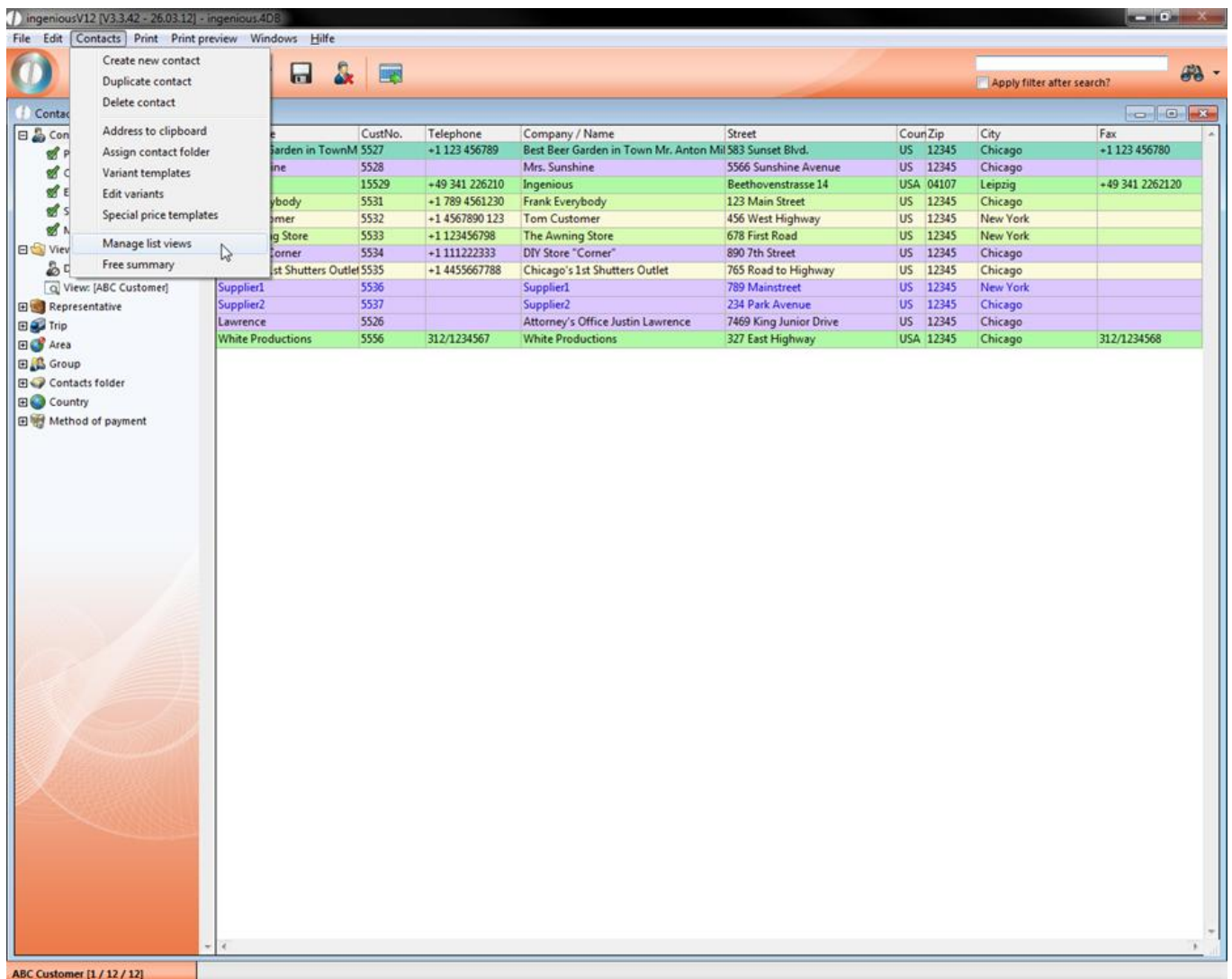


Content of the contact folder “New York”

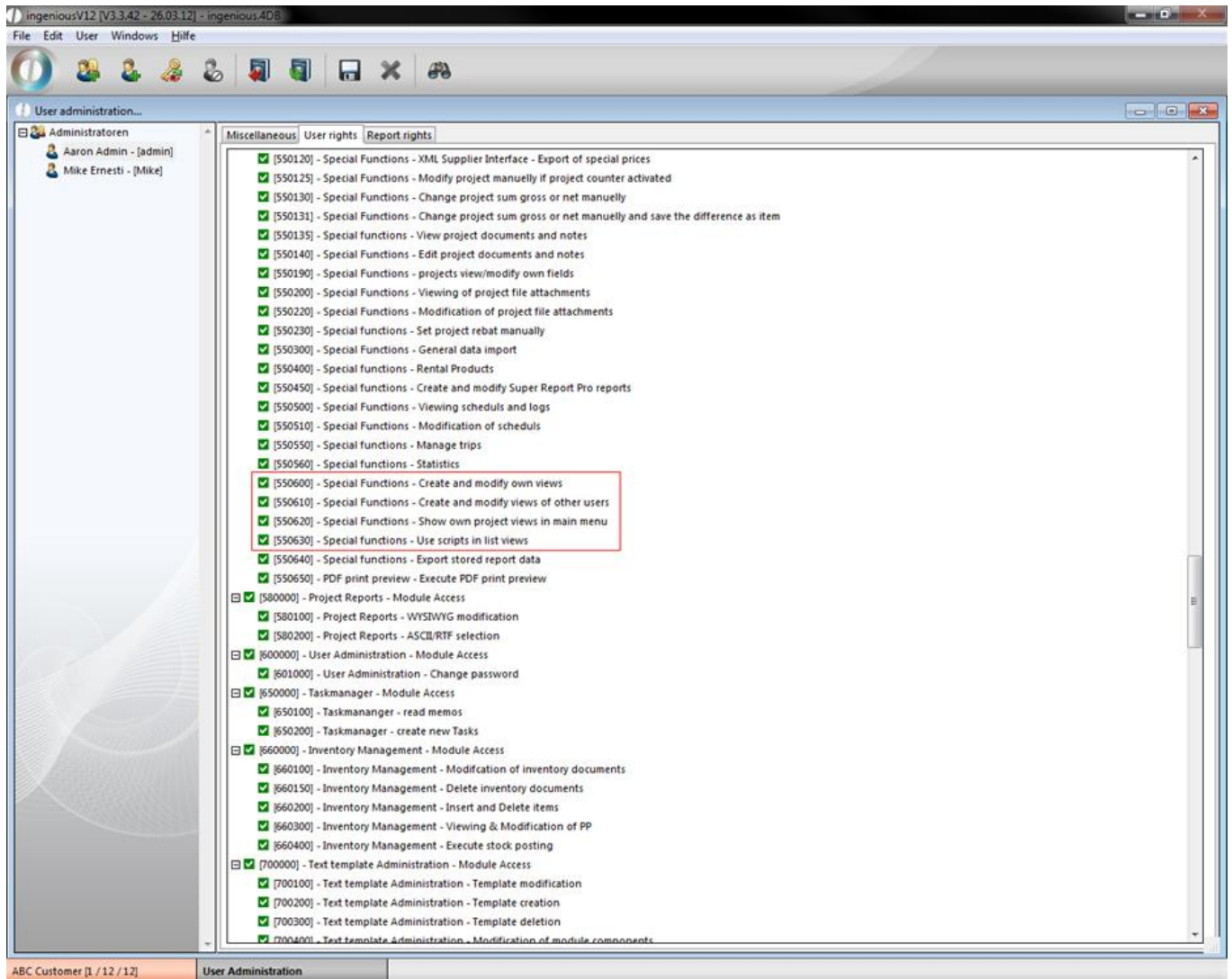
If one needs this group again, a click on the respective icon is sufficient.

3.1.1.5 Manage list views

You can find the menu entry “Manage list view” in every module of ingenious v12.



The specific user rights in the user administration have to be activated to make the menu entries visible.



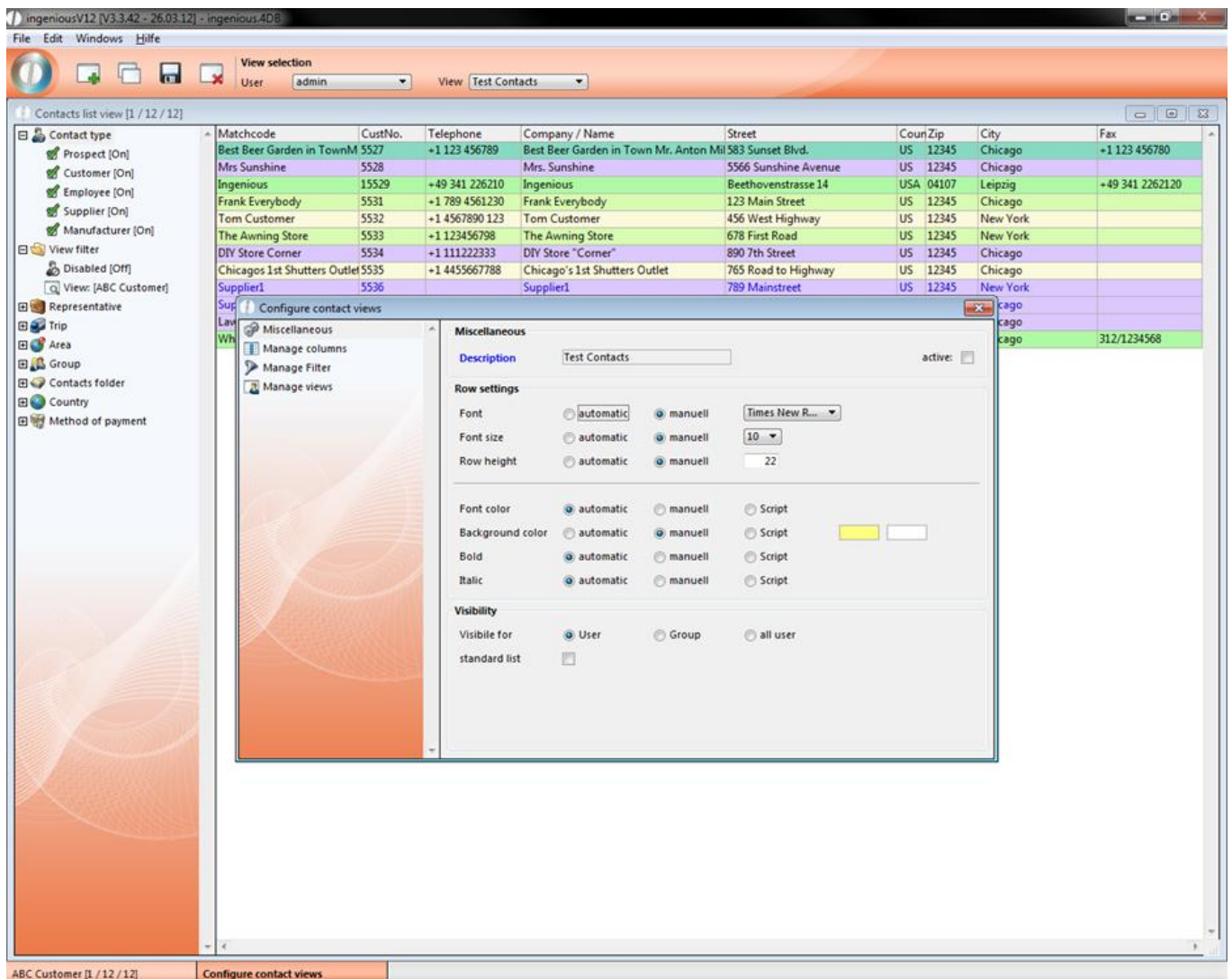
By clicking the menu entry a window will open up, where you can create a new list view or choose an existing in the popup field "View". In the data selection area "Miscellaneous" you can name and de-/activate the list.

Here you can change several row settings. When you choose the option "automatic" the basic settings of ingenious.v12 will be used. The option "manual" will open the specific edit area, where you can customize the desired setting.

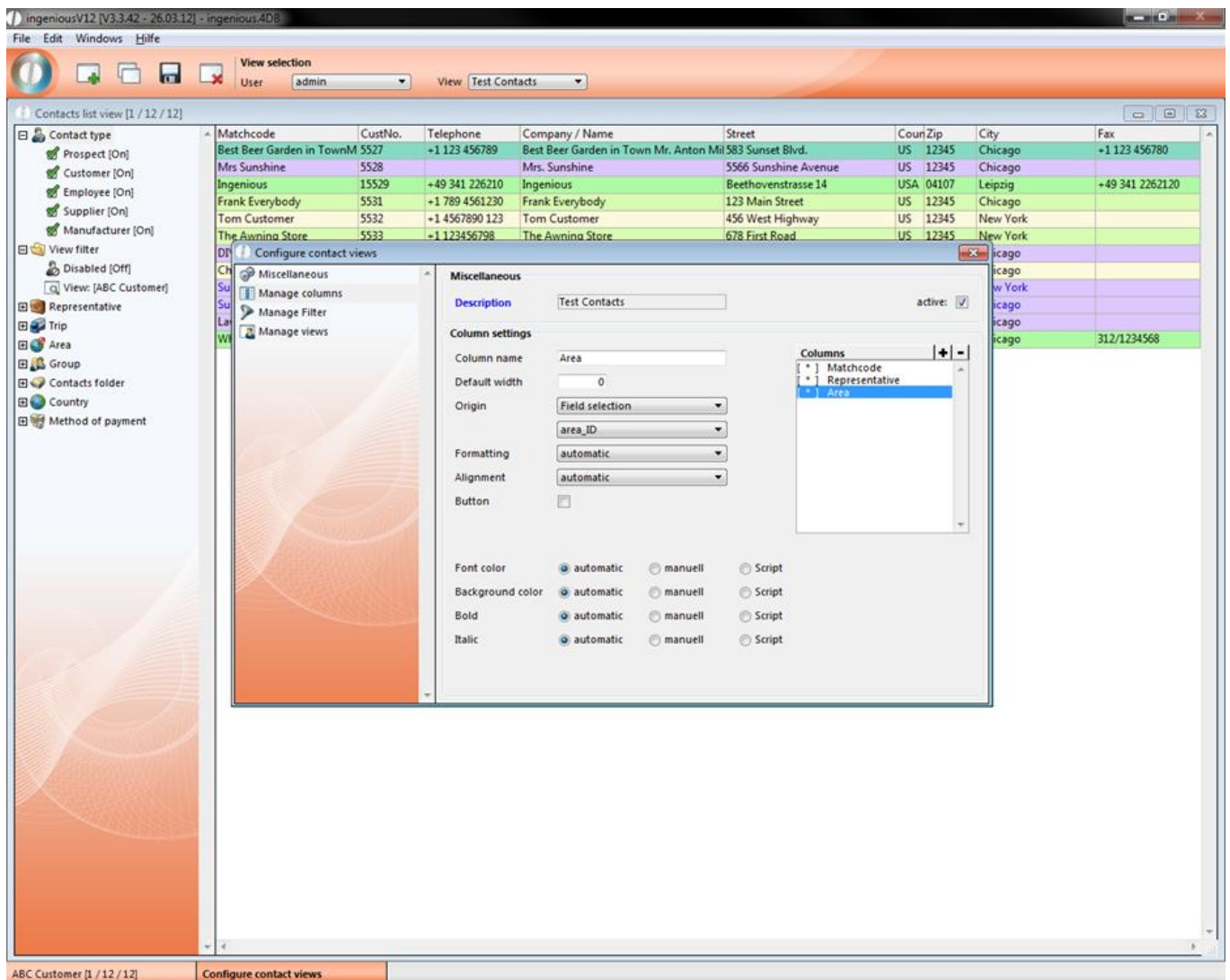
In the color settings just double click the rectangle and a color table will open up, where you can make your choice.

Furthermore it is possible to assign an individual script from the "free data manipulation" in some row settings.

In the "Visibility" group you can adjust, who can use the created list view (only you, your user group or everyone).

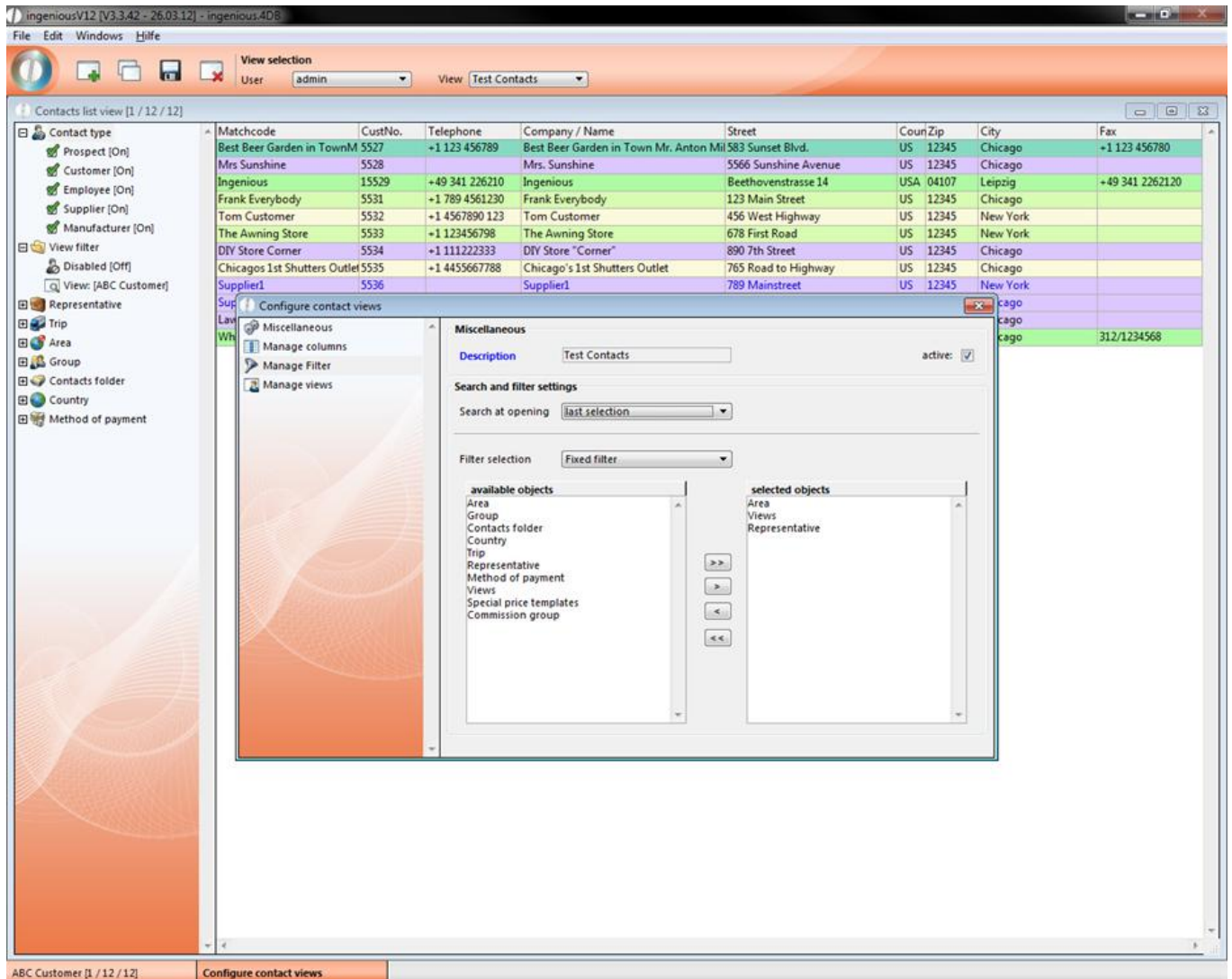


In "Manage columns" you can customize several column settings. Add/delete a column by clicking **+** respectively **-**. The name of the column and the standard width (pixel; initial value is 0 (=dynamic width)) can be set individually.



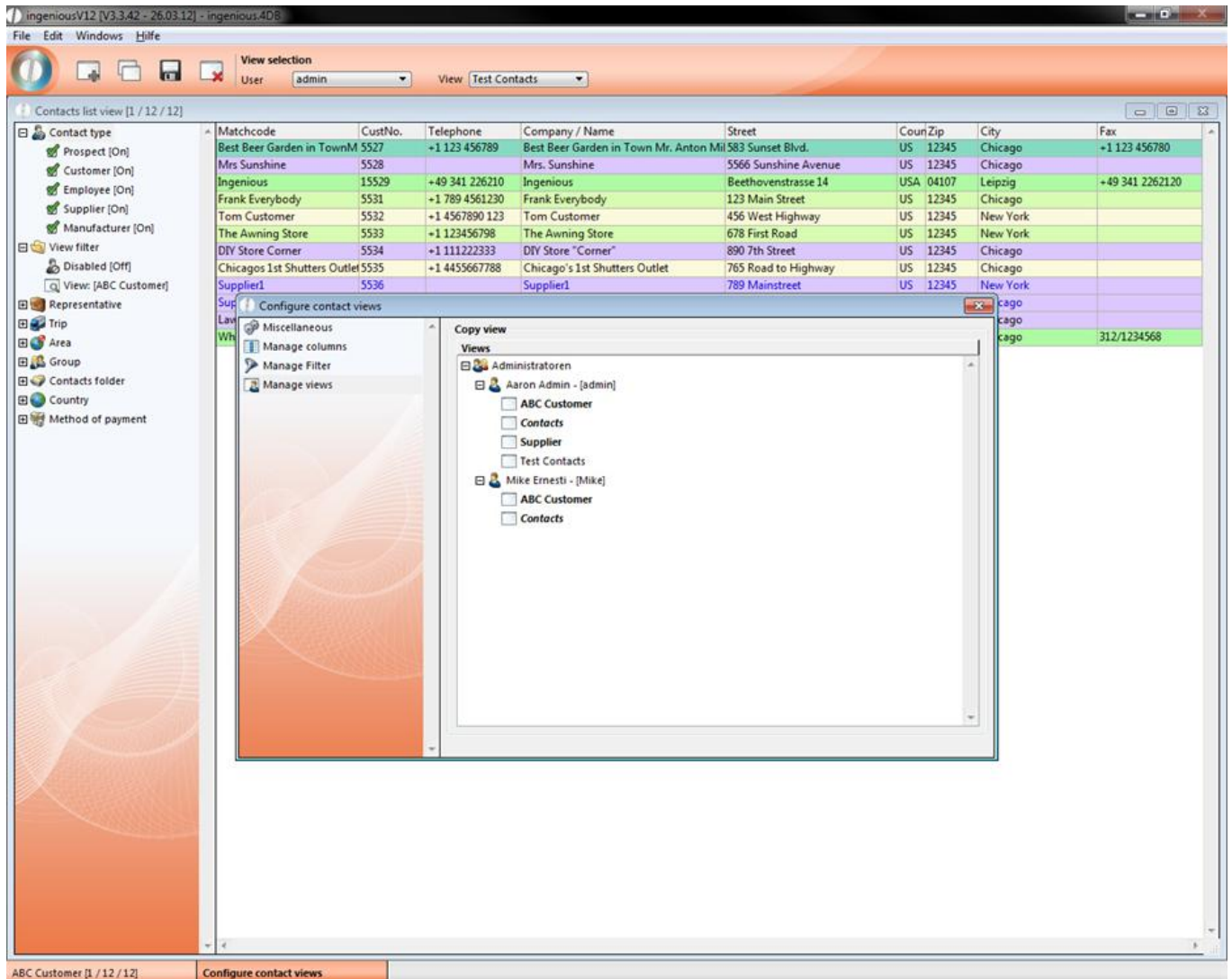
In the group "origin" the content of the column is defined. In the first popup field you can choose between predefined columns, field selection and script. In the second popup field you can specify your choice.

The example shows a configuration with three columns "Matchcode", "Representative" and "Area".

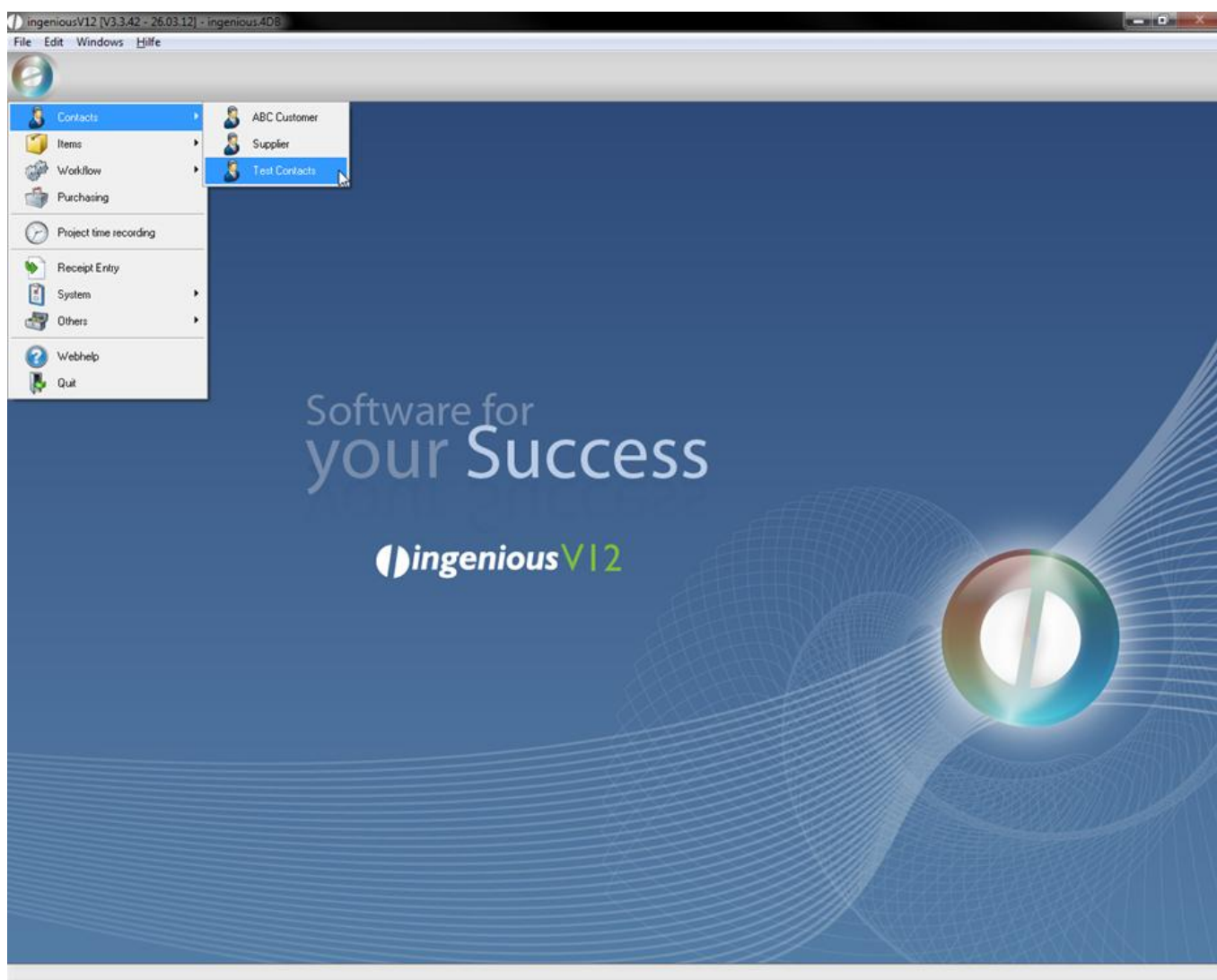


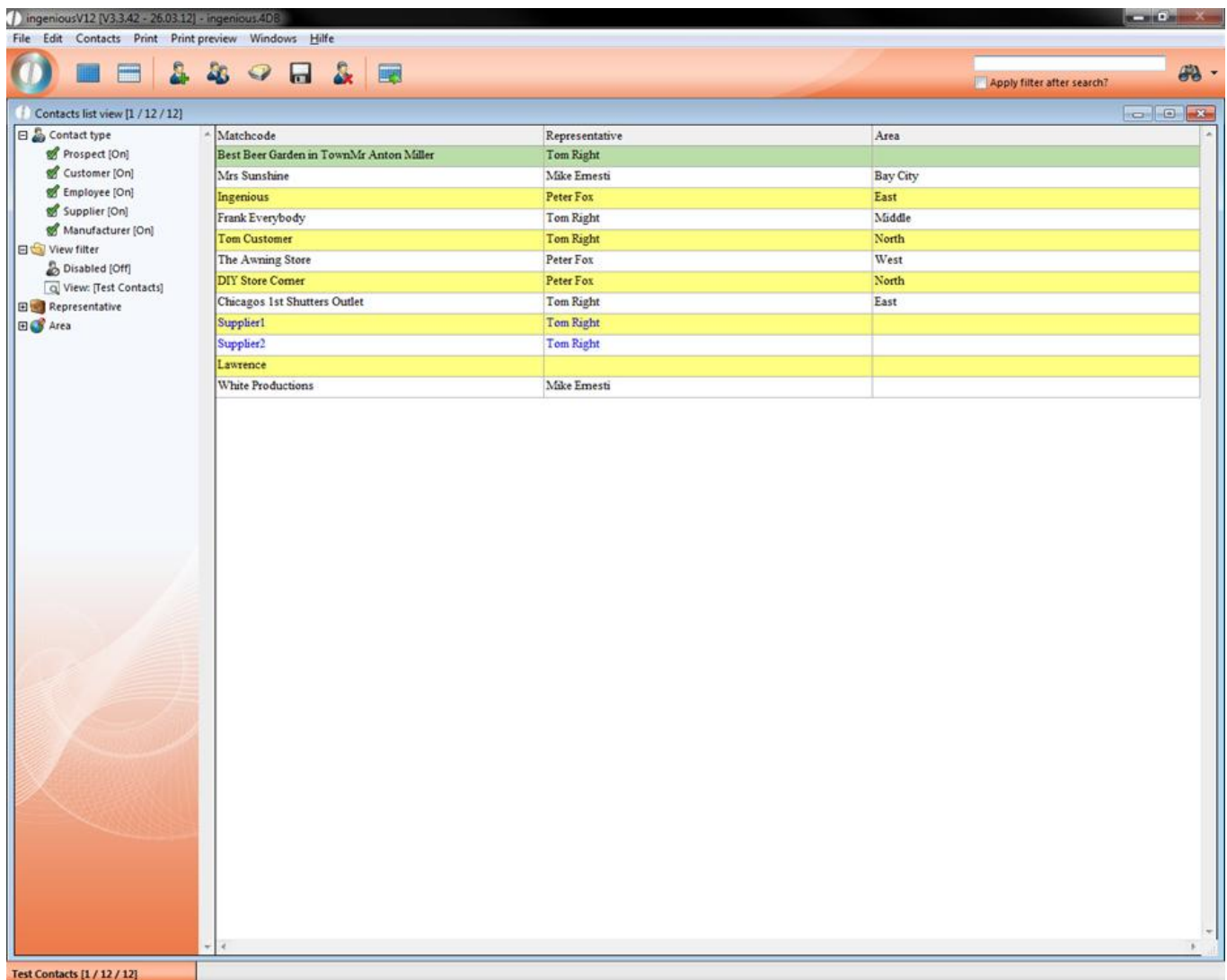
In the third data selection area, "Manage Filter", you can customize filter- and search settings of the list view. In the popup field "Search at opening" you can determine which list items should be displayed after opening it.

You can choose the content of the selection area in the field "filter selection". According to the selected option the available items will be listed in the area below.




The last category "Manage views" is only available when the user right "[550610] – Special Functions – Create and modify views of other users" is activated. Here you can copy the list view simply by drag and drop and assign it to the specific user. According to the type of use the list views are displayed in a different style (normal = a user, bold = all users, italic = inactive list). To display the own list view in the main menu, the user right "[550620] – Special Functions – Show own project views in main menu" has to be activated.



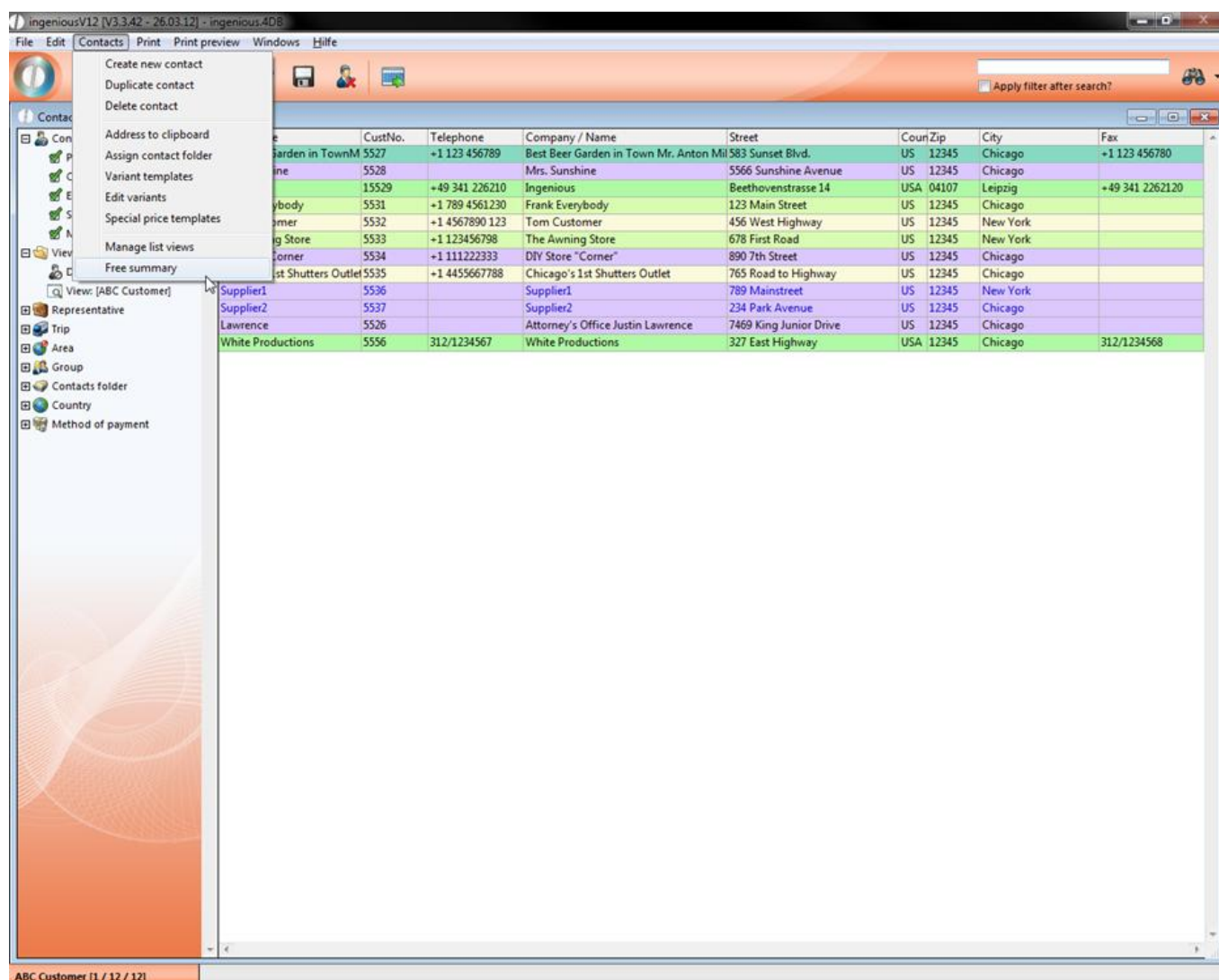


Example of a list view

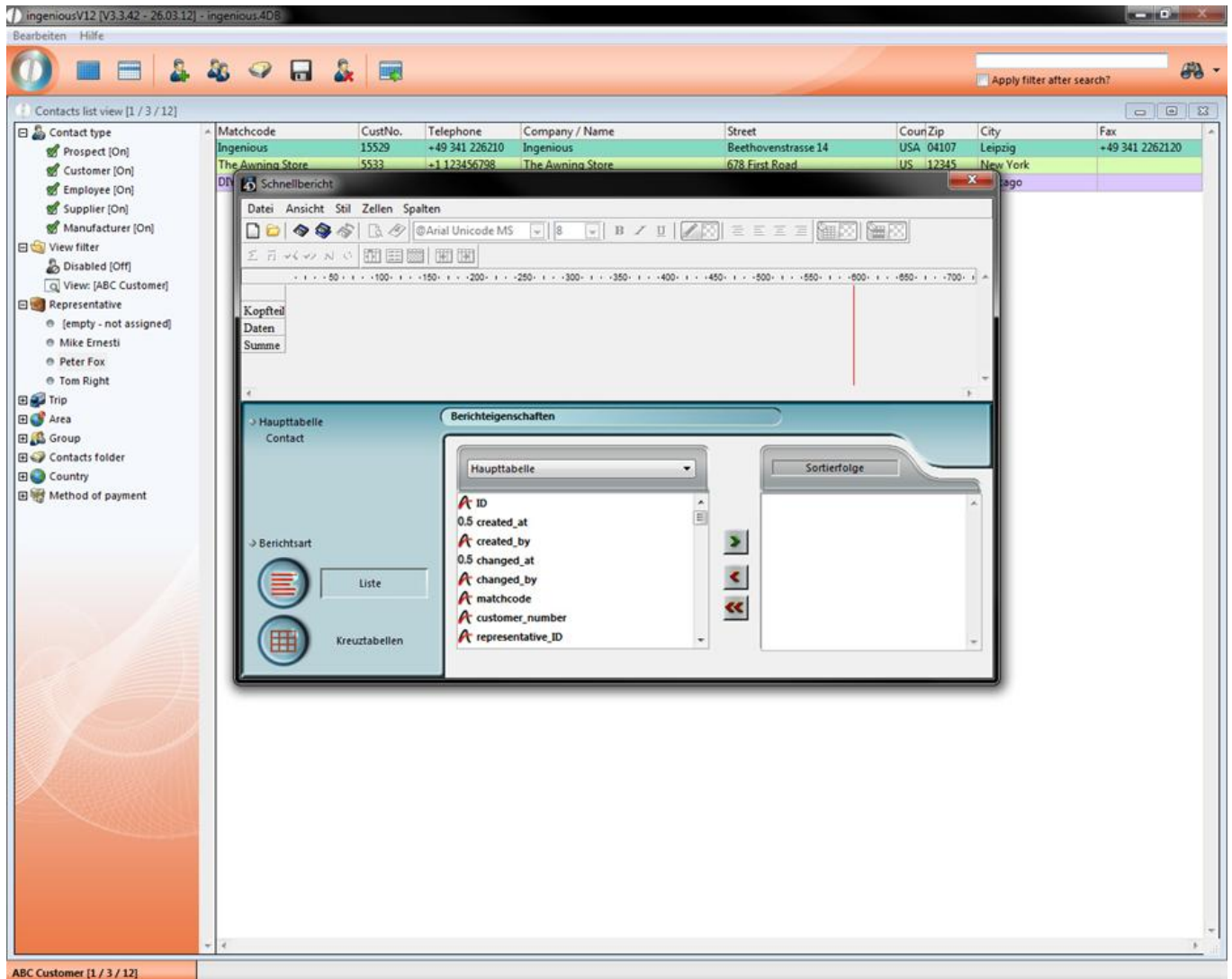
To delete a list view you have to select the user and the specific list in the icon bar and click  "Delete view".

3.1.1.6 Free Summary

In order to also use your data from Ingenious.V12 in other applications, Ingenious.V12 provides you the easy export function "Free summary" (used partly also under the term ASCII Export is used, i.e. in the user administration). You will find this function under the menu option "Contacts/Free summary".



The so-called Quick Report that consists of three main areas, opens.



View of the export function

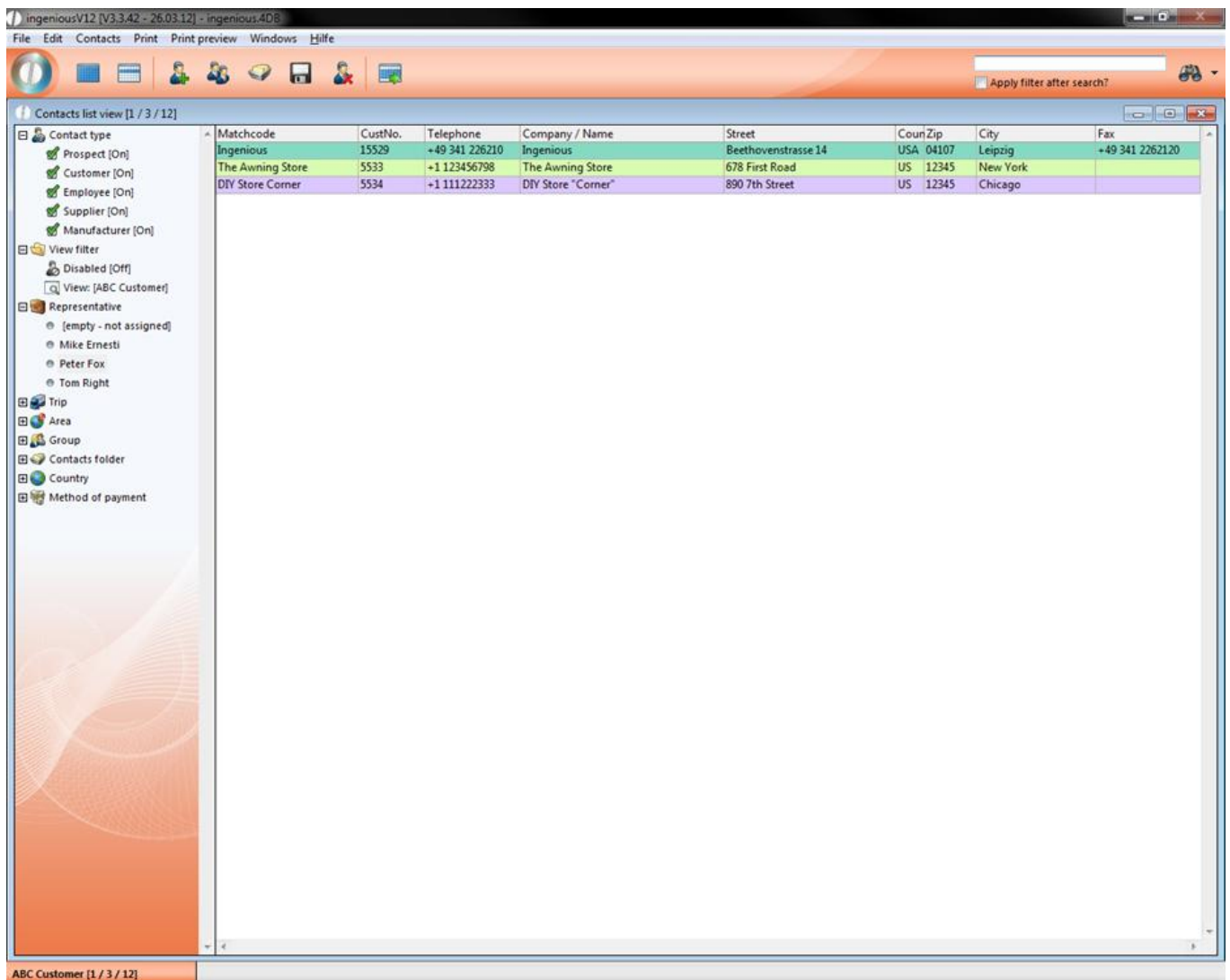
Note:

- A) Everything that is found in the selection area can be exported.
- B) Everything that is found in the export area will be exported.
- C) In the sorting area, one can possibly also sort the date to be exported.

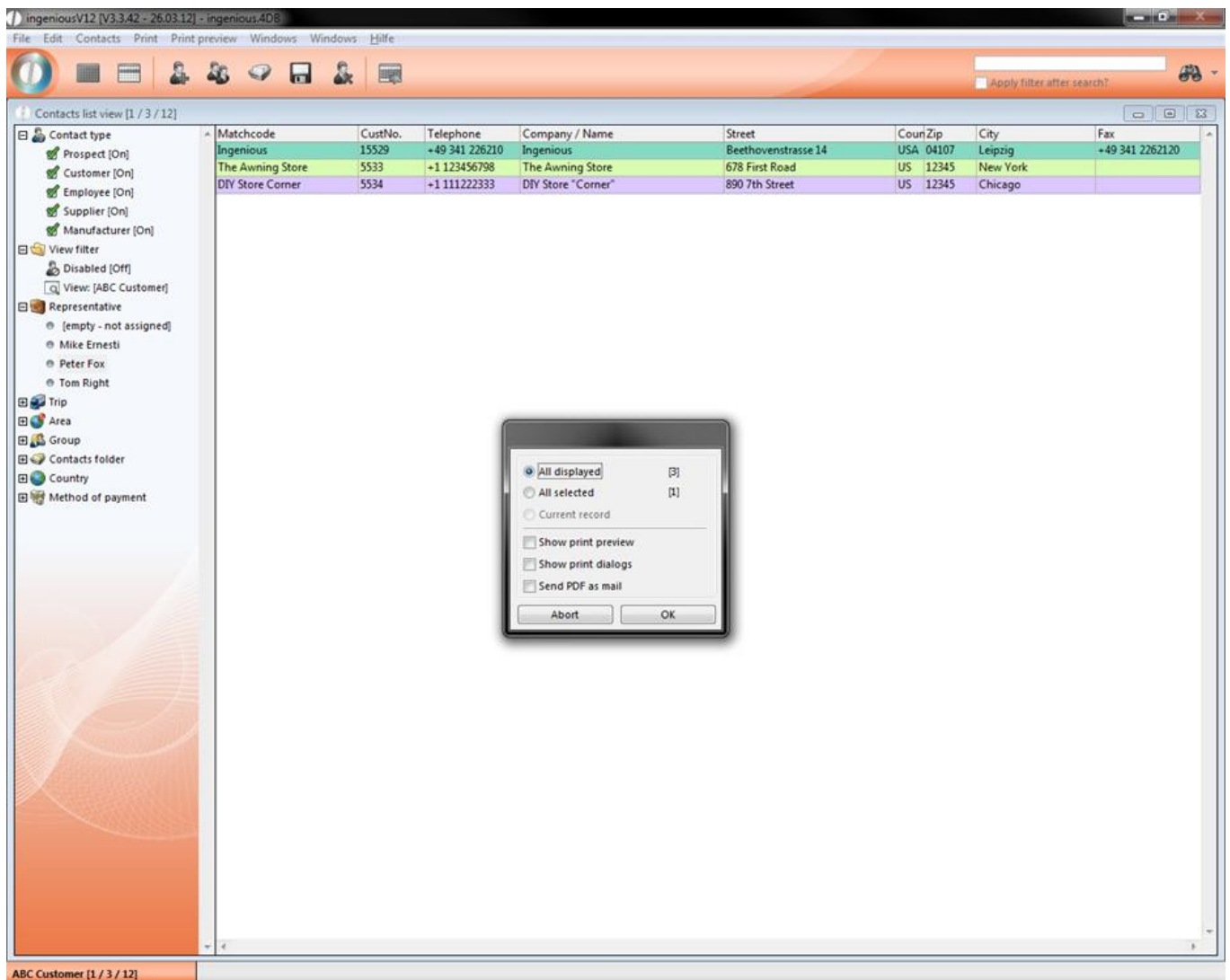
Practice with the free summary

In this exercise, all records from the contact folder "New York" should be exported in the Microsoft Excel program. In addition, you should sort the export according to the postal code.

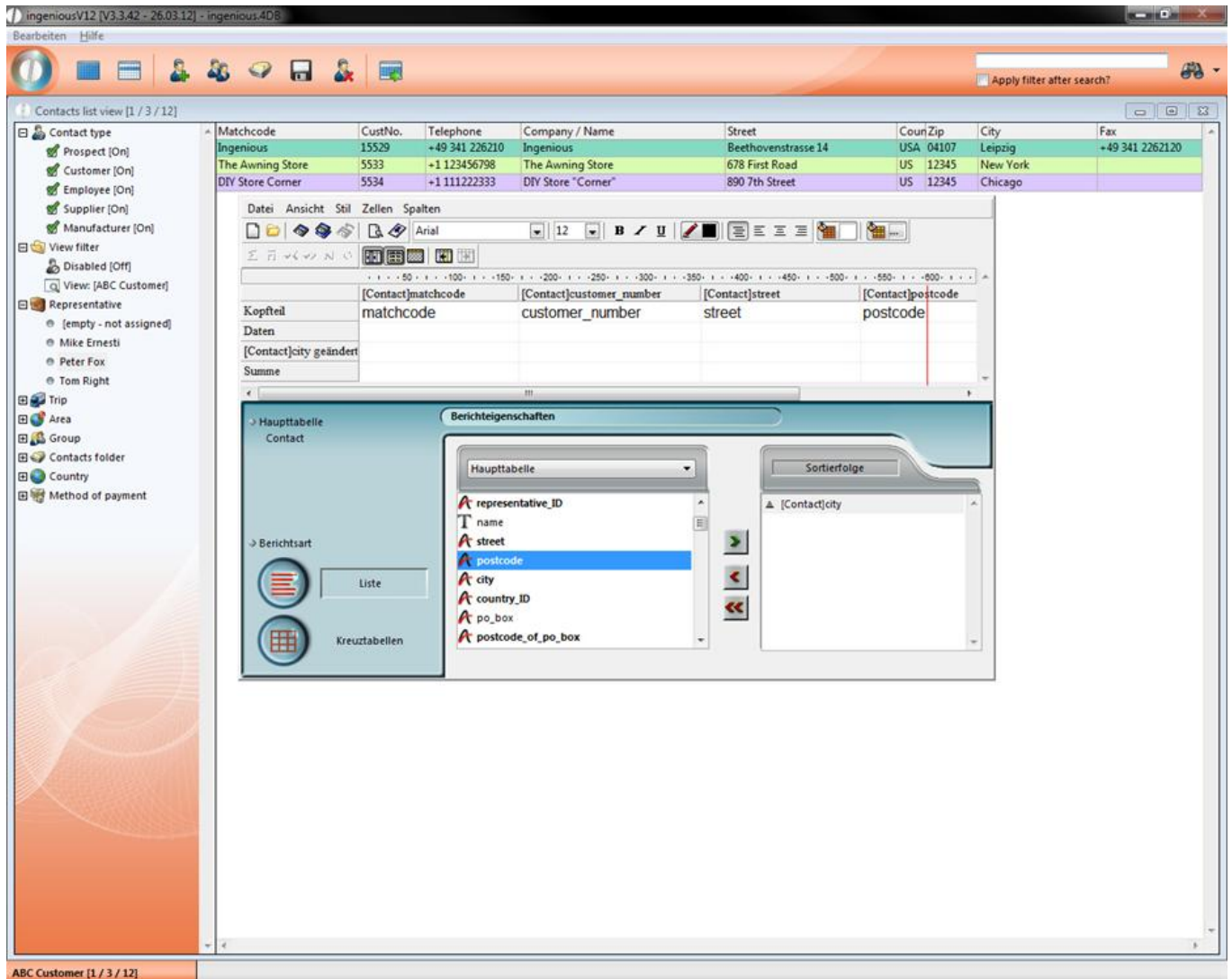
1. Click on the contact folder "New York" to open the records that are to be exported.




2. In the main menu, select the entry "Contacts/Free summary". In the print dialog window that appears, select the option "All selected" and confirm this with the "OK" button.

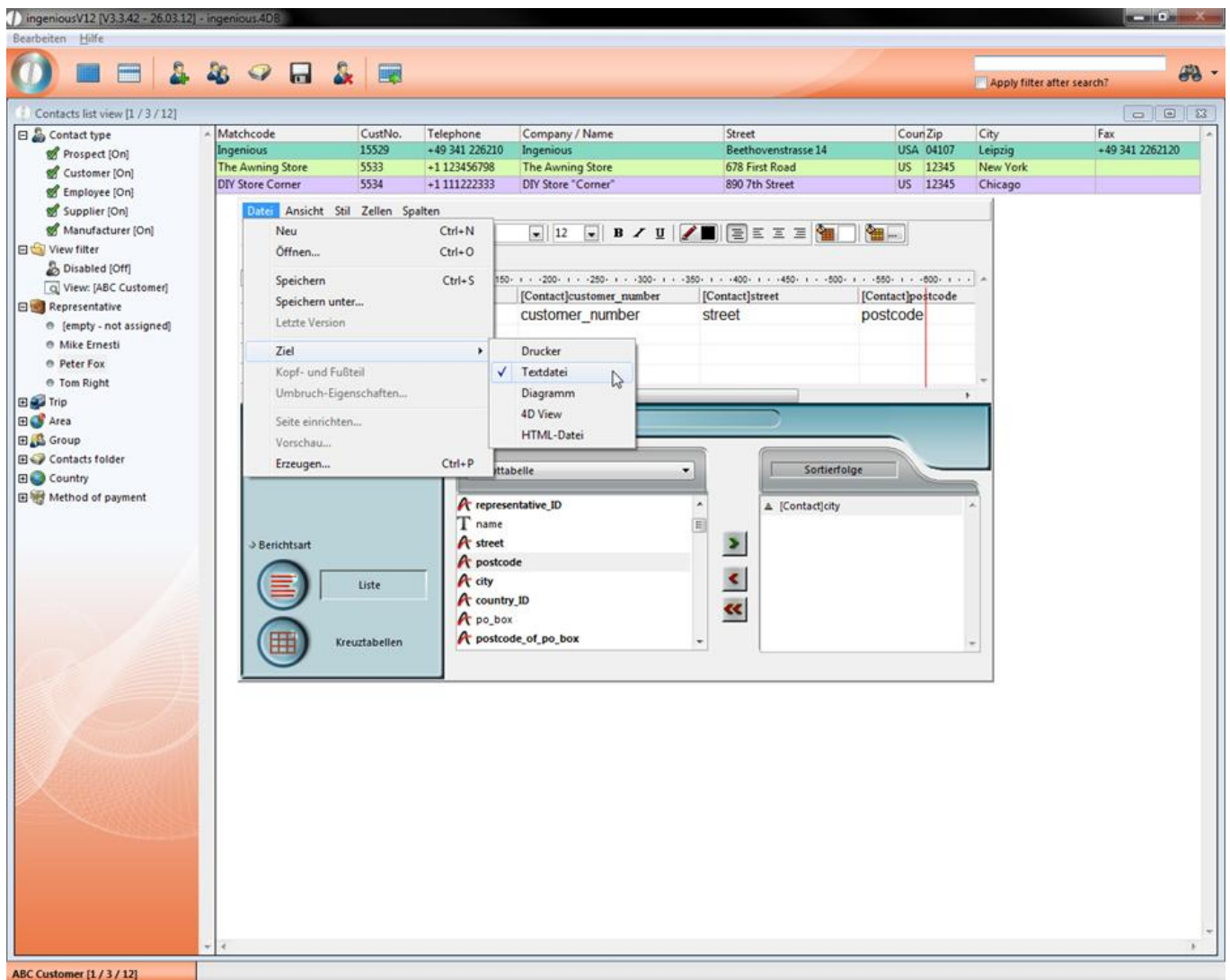


3. In the Quick Report window, you transfer the fields "Matchcode", "Customer number", "Street", "Postcode" and "City" from the selection range into the export range. In addition, you have two possibilities. Either you double-click on the corresponding fields or you drag the fields with the mouse (called Drag & Drop) from the selection range into the export range!

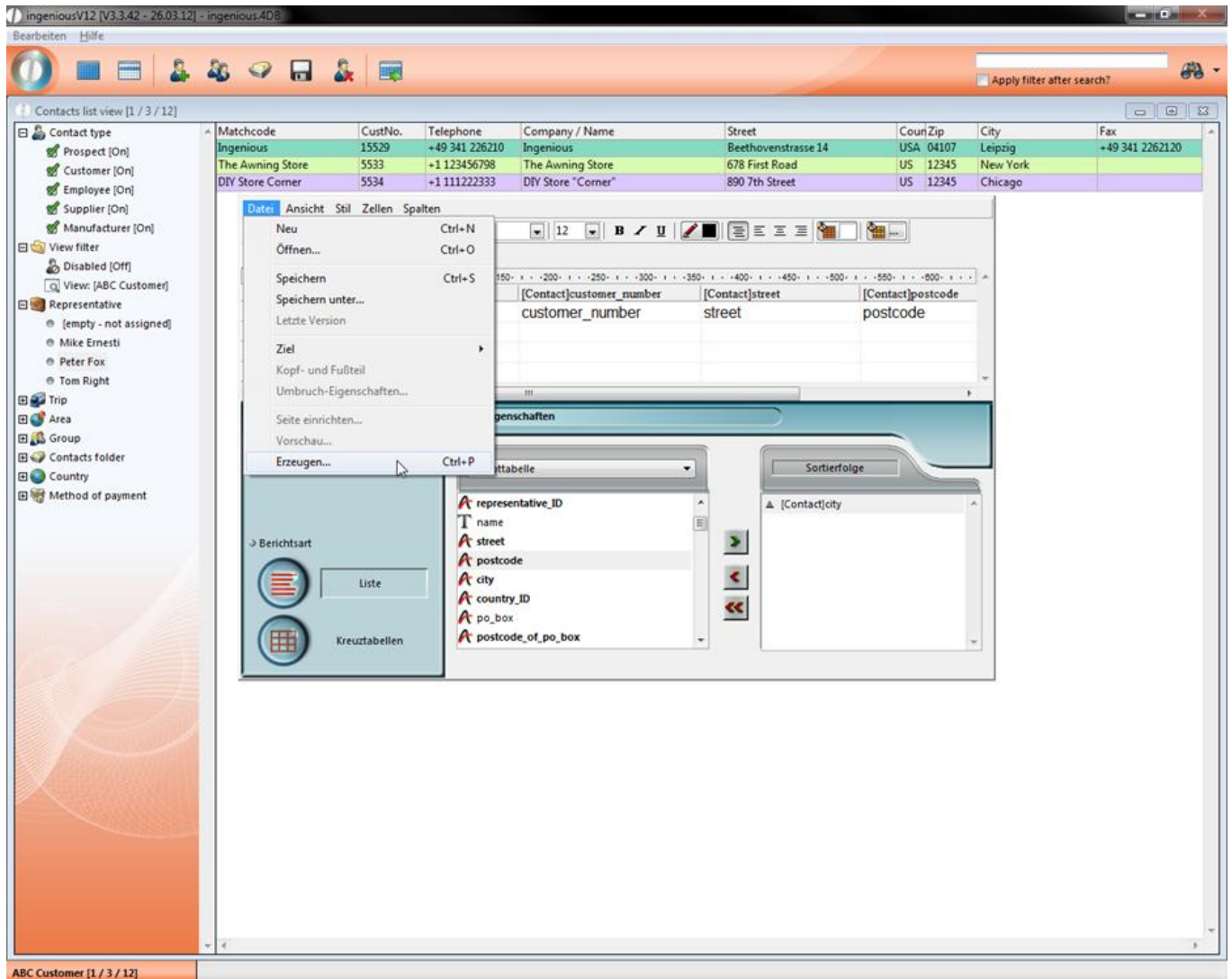


4. Sort your export according to street. Either drag the field "city" with the Drag & Drop in the sort area. or mark the field and then click on the  button to transfer to the next field.

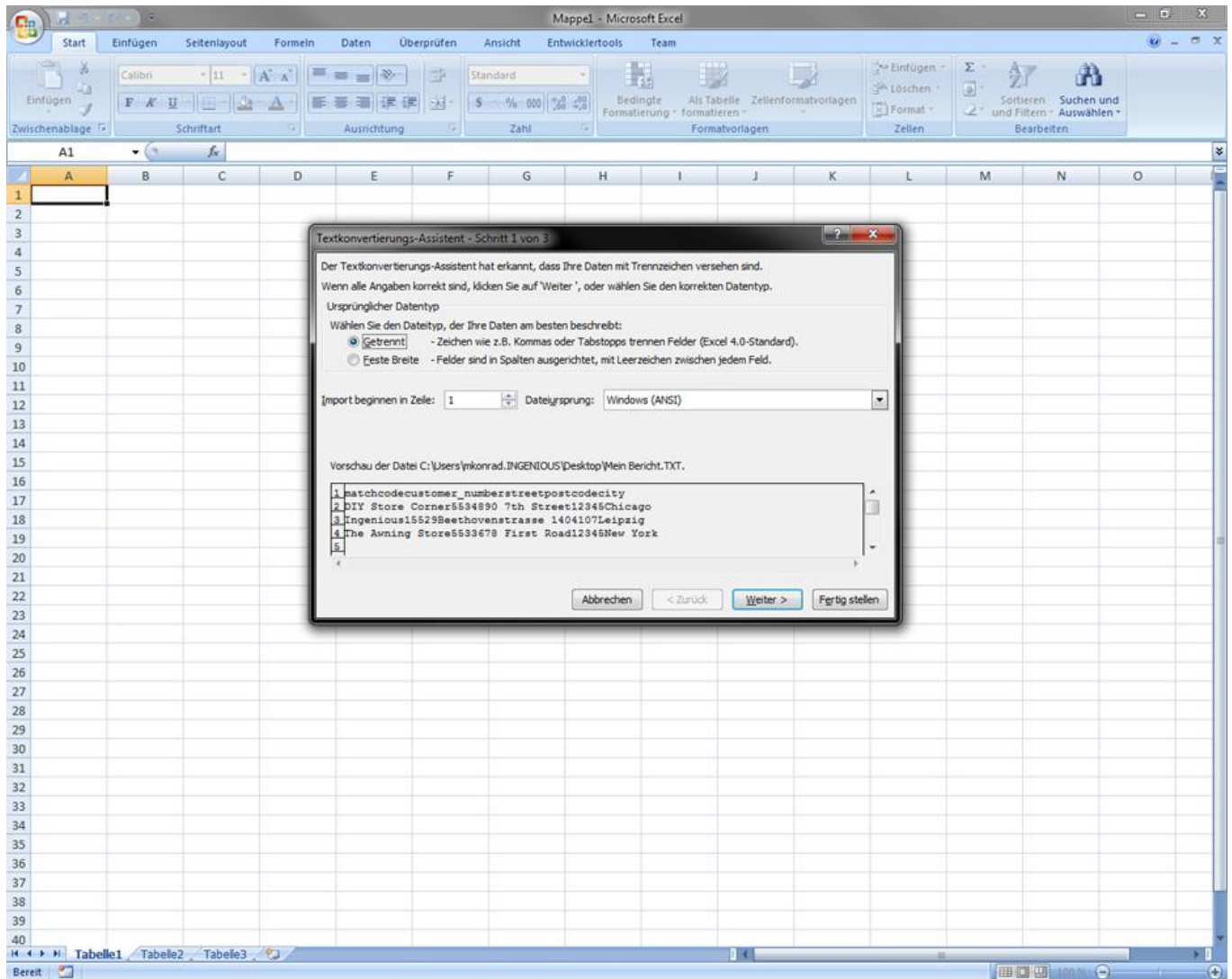
5. Select the entry "File/Target/Text document" in the menu.



6. In the menu, select the entry "Data/Generate."

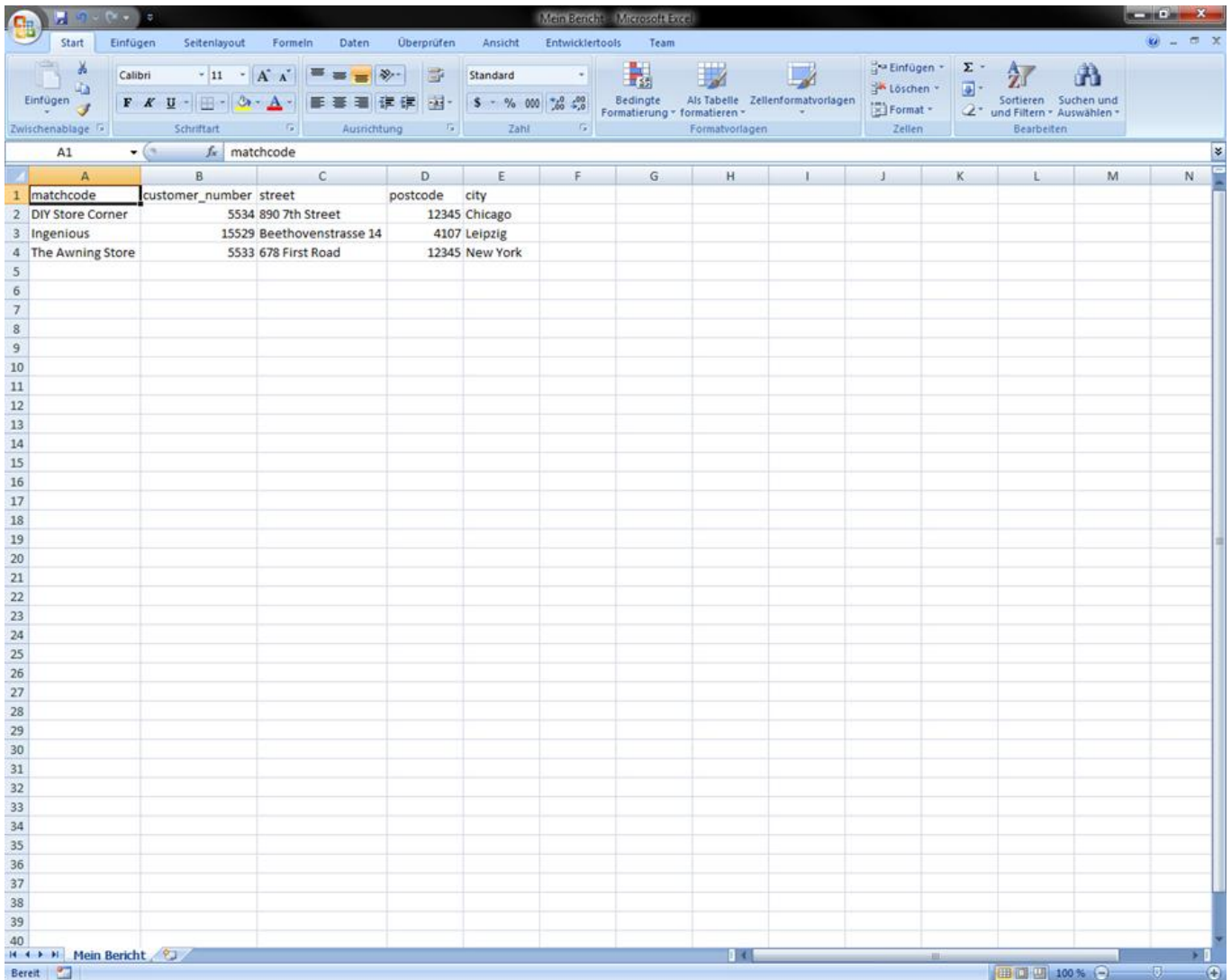


7. A standard dialog from Windows appears for saving data. Select a path and enter "Export1".
8. After you have saved the data and if you don't wish to export anything else, then you can close the Quick Report.
9. Then start the program "Microsoft Excel" on your PC and select the menu option "File/Open".
10. A Windows standard window will appear to open the data. Search for the file that was just exported "Export1.txt" and open it.
11. The "Text-Conversion Assistant" in Excel will appear.



12. Leave the standard settings the way they are and click on the button, "Finish".

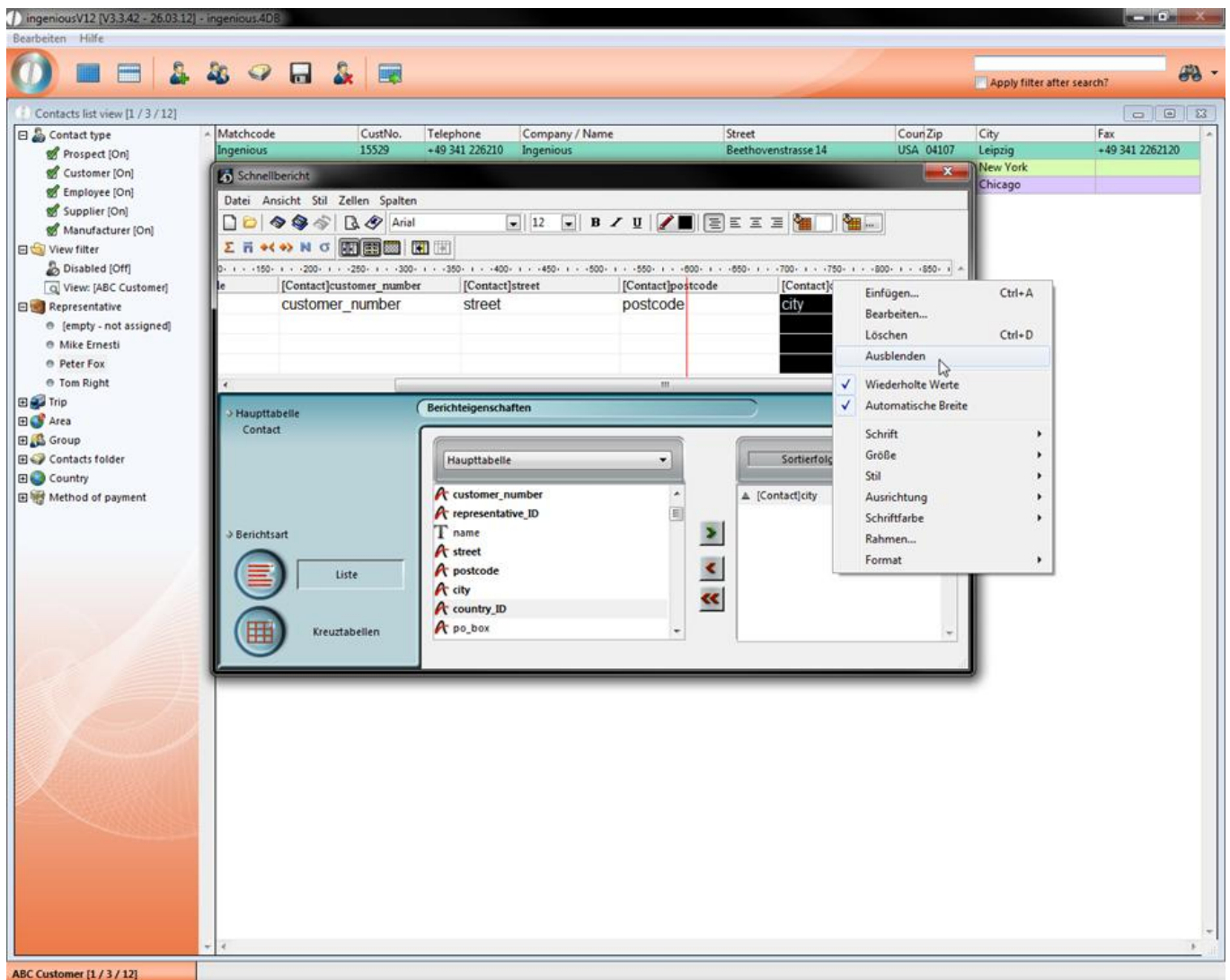
Your excel spreadsheet will look like the following.



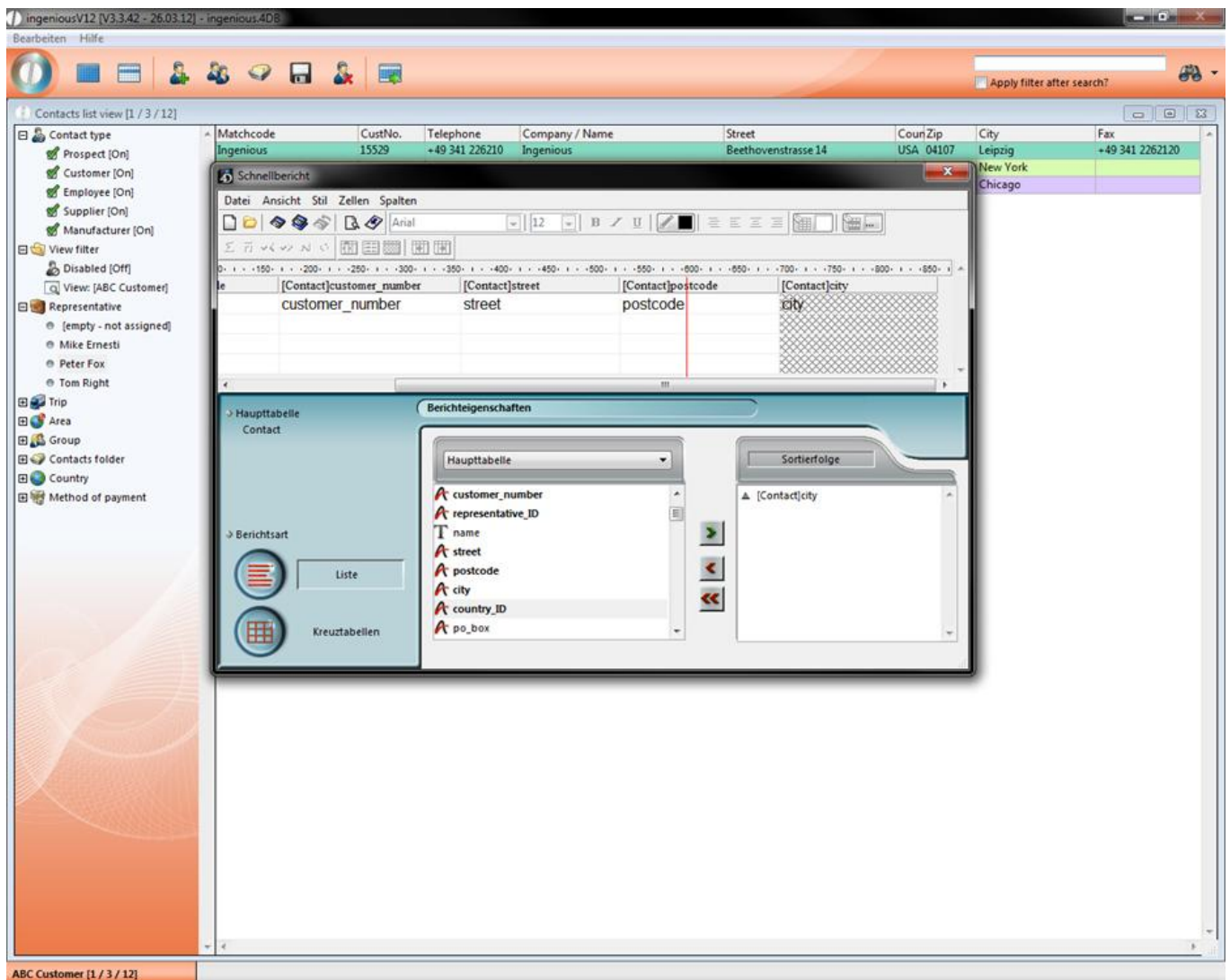
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	matchcode	customer_number	street	postcode	city									
2	DIY Store Corner	5534	890 7th Street	12345	Chicago									
3	Ingenious	15529	Beethovenstrasse 14	4107	Leipzig									
4	The Awning Store	5533	678 First Road	12345	New York									
5														
6														
7														
8														
9														
10														
11														
12														
13														
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As you can see, the selected records are listed among each other, with the respective column designation in the top row. All are sorted in ascending order according to the street. With the help of the text file (*.txt) you can import your data without problems into every other program, in order to further process it. Of course the function "Free summary" quotations you even more. With this you can even sort your export according to hidden or invisible fields.

In order to do this, you must hide only the field, which is not to emerge afterwards in the exported file. This happens within the export range. With a right click on your mouse, simply click on the appropriate field and select the entry "Hide" from the context menu that now appears. As an identifying feature, the field is covered now with a grey diamond grid. In the exported file, the hidden field no longer appears, but will still be sorted afterward.

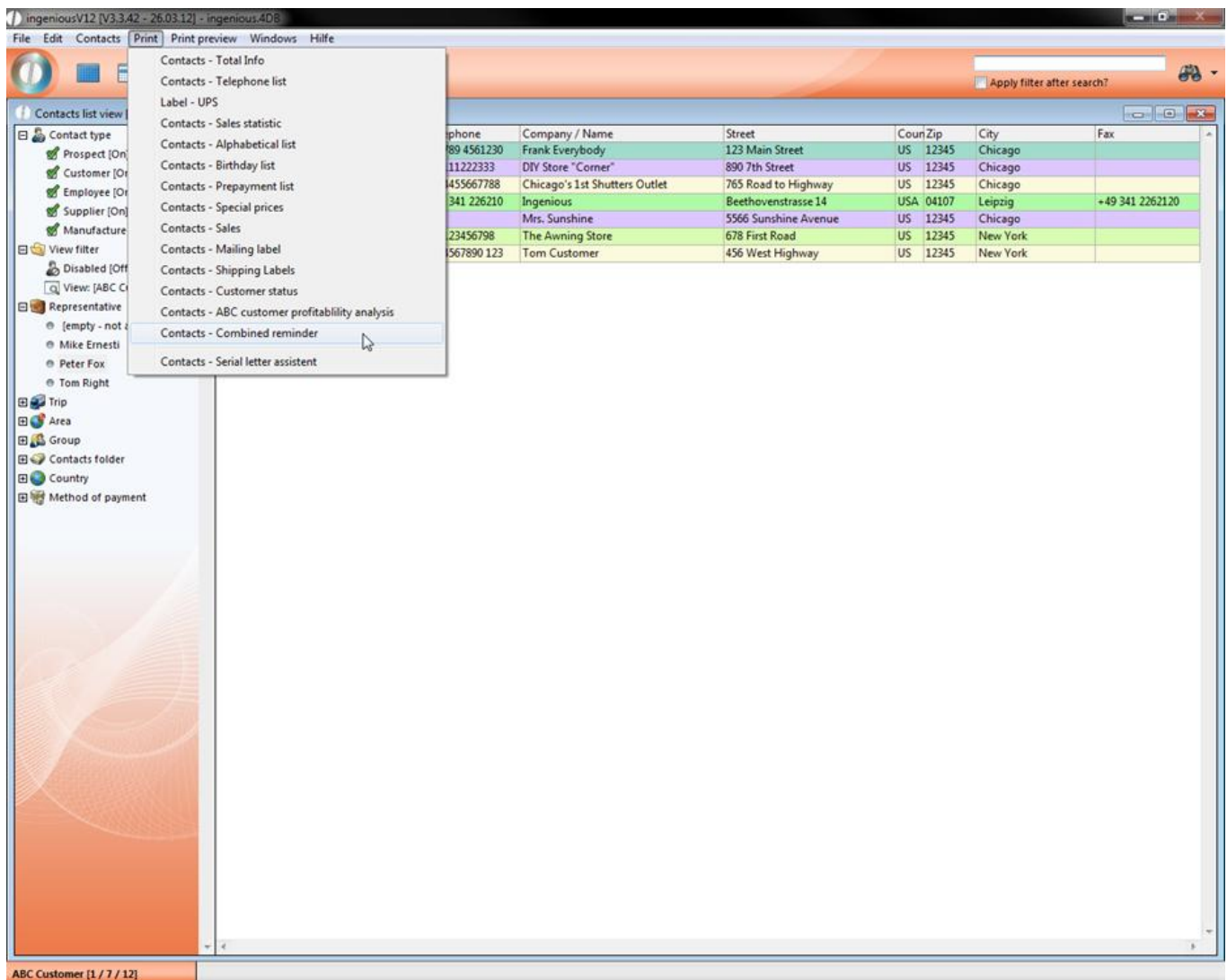


In the export function you can also determine whether data should be sorted in ascending or descending order. In order to do this, it is sufficient to click in the sort area on the triangle next to the field in according to which the data is to be sorted.

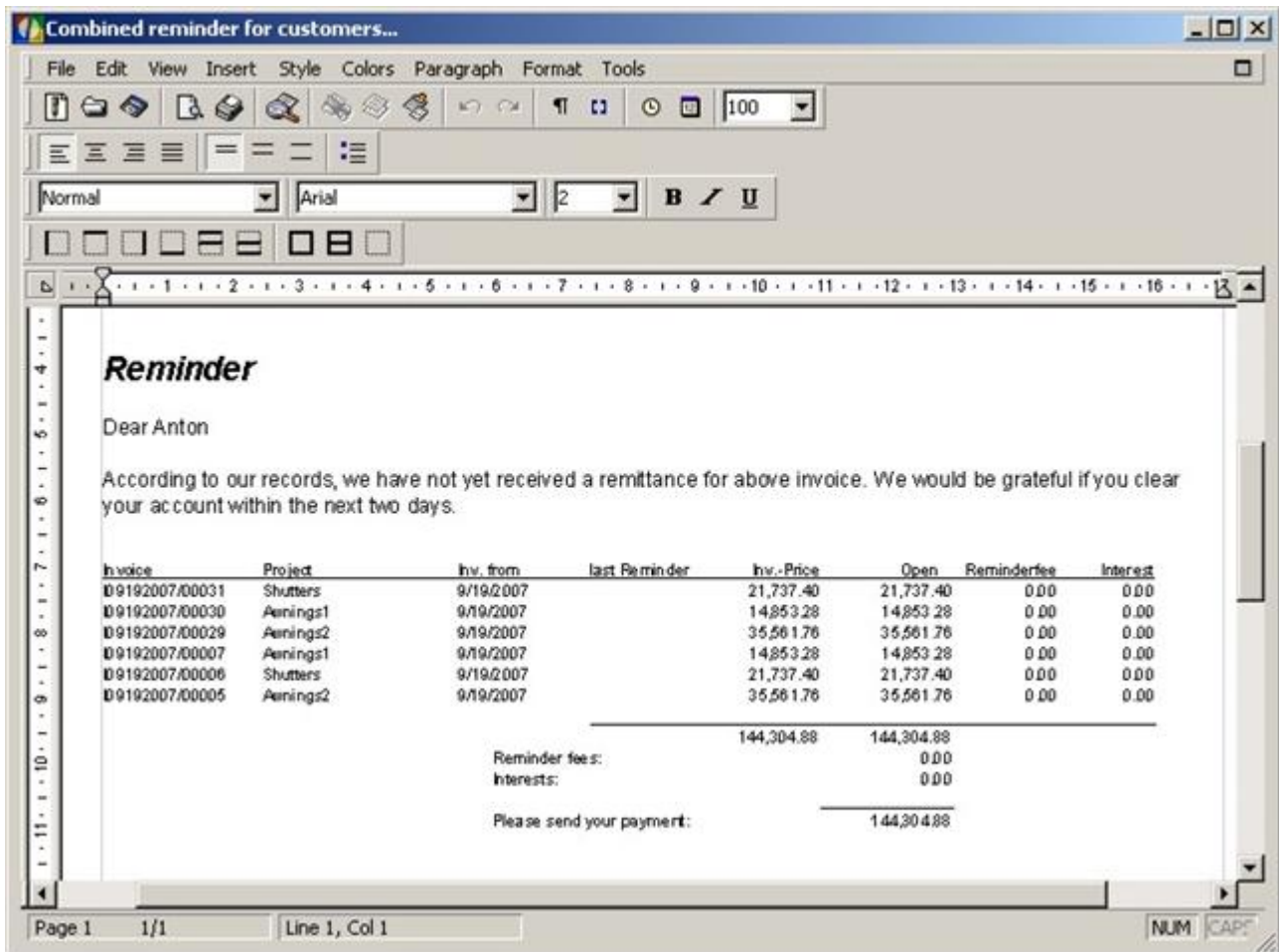


3.1.1.7 Combined reminder

In the menu option "Print" in the main window of Ingenious.V12, you will find two functions "contacts – Combined reminder".



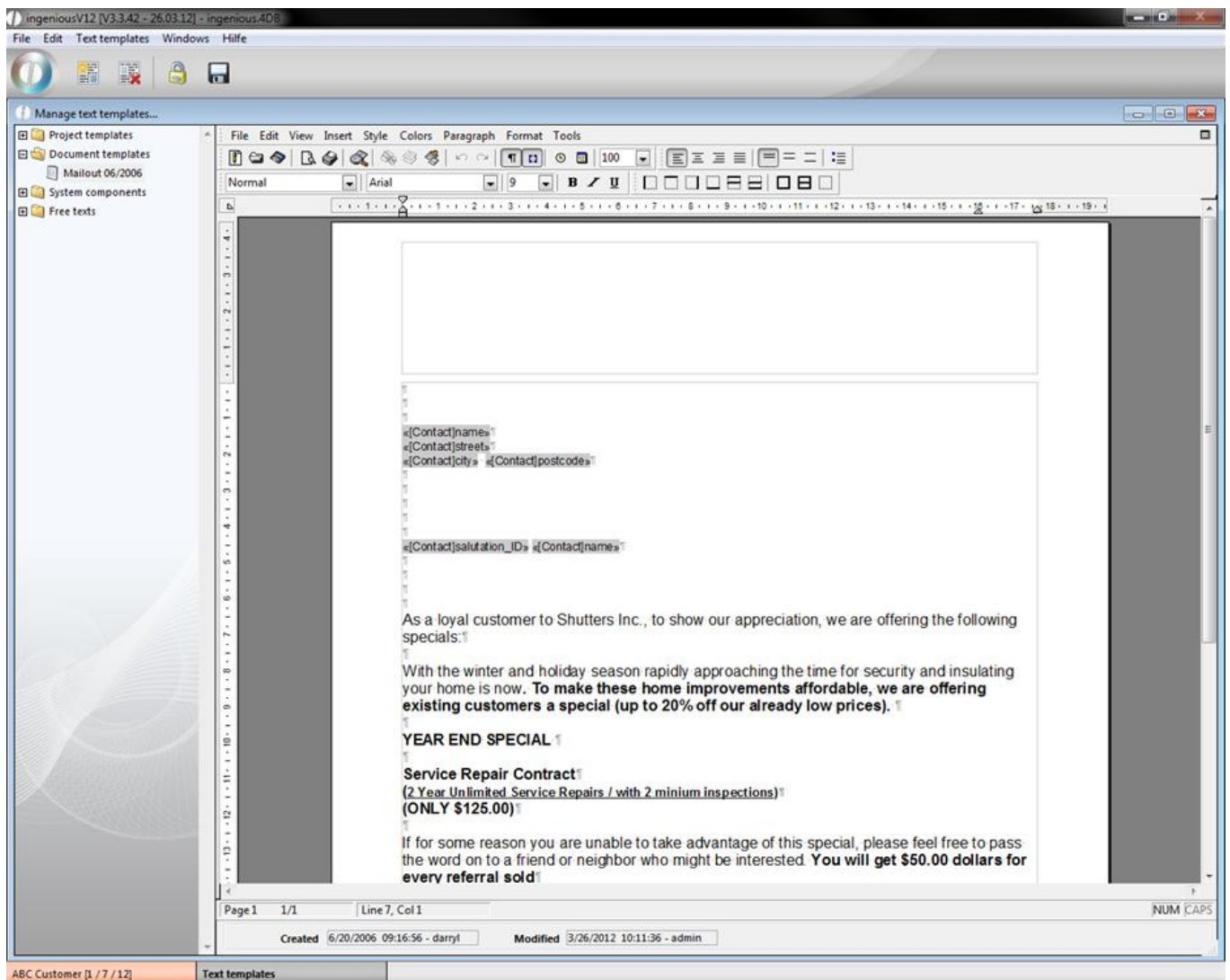
The function checks all open contact invoices for the due date and lists them in a reminder. The payment reminder and the second or third reminder are combined in one letter. In order to use this function, you must first select the respective contacts.



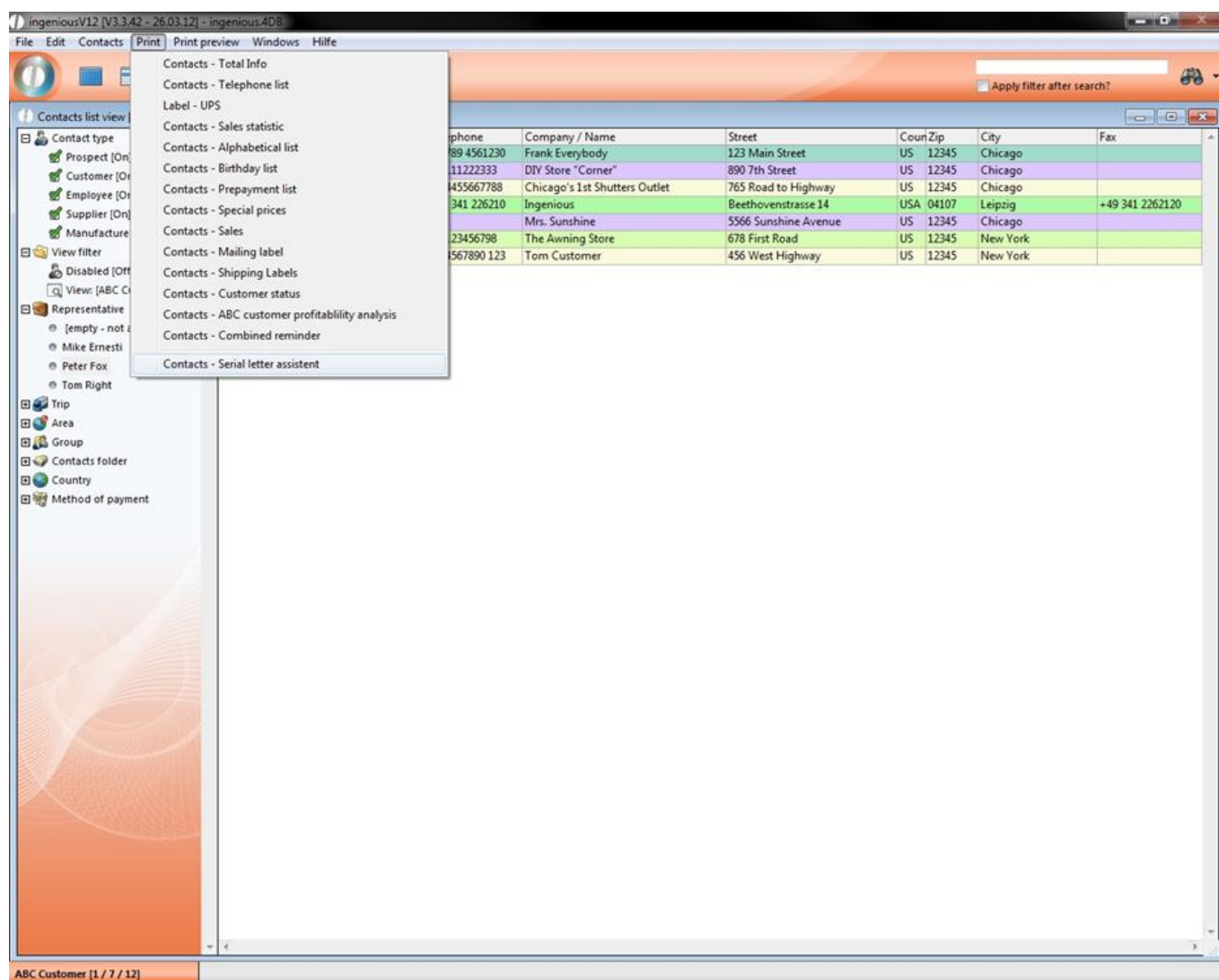
This combined reminder will automatically be created by Ingenious.V12 and will be geared towards the reminder period that is specified for specific contacts. In addition, you have the possibility to work on the combined reminder in the text-processing window if necessary. The template for the combined reminder can be revised in the text template administration.

3.1.1.8 Serial letter assistant

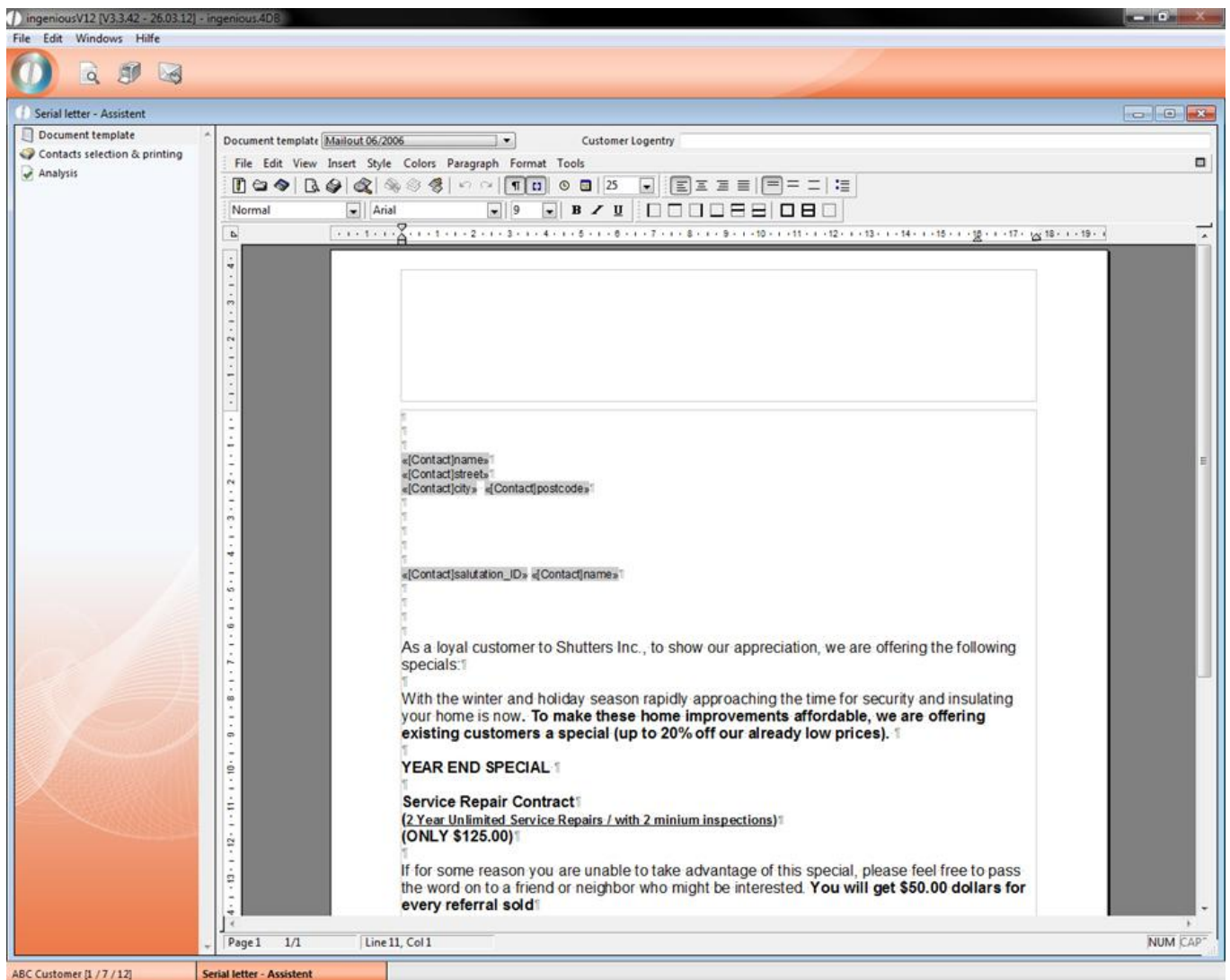
For targeted advertising measures, the practical serial letter assistant is available to you. You can send promotional letters quickly and easily with its assistance by post or E-Mail. First consider whom the letter is to reach. Select the corresponding contacts with the help of the filter and the search function from your database, and assign a contact file to them. For practice purposes, the contact file "Test files for serial letter" was already created. Next you will write your promotional letter in the text template administration. Create the letter under the column "Document templates". Create an invitation for an Open House at your company, for example.



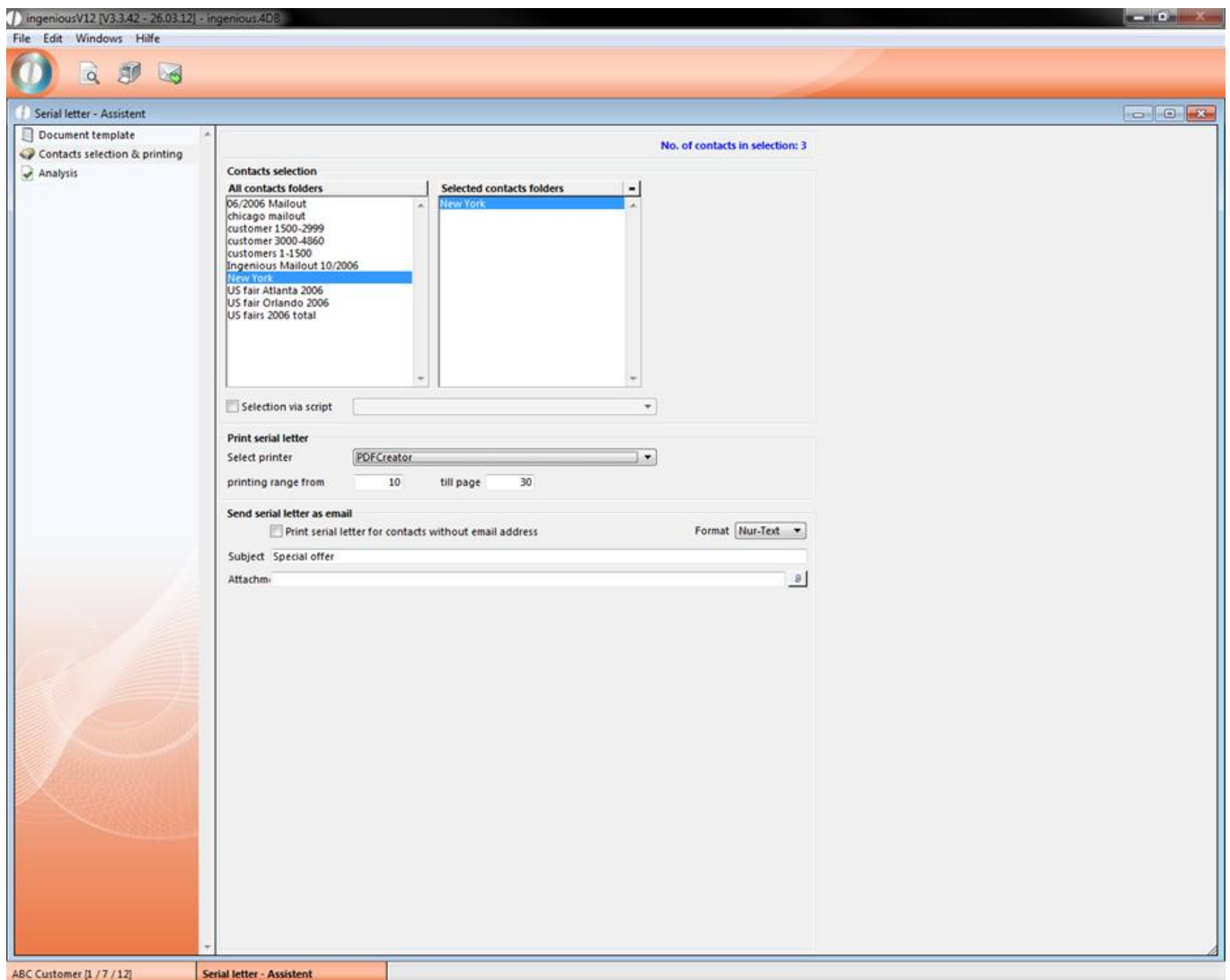
Complete the text revisions and save the document. Change to the "Contacts" module. In the menu, "Print", you will find the serial letter assistant at the bottom. Open it by clicking on it.




First select the document template that you created for your serial letter.

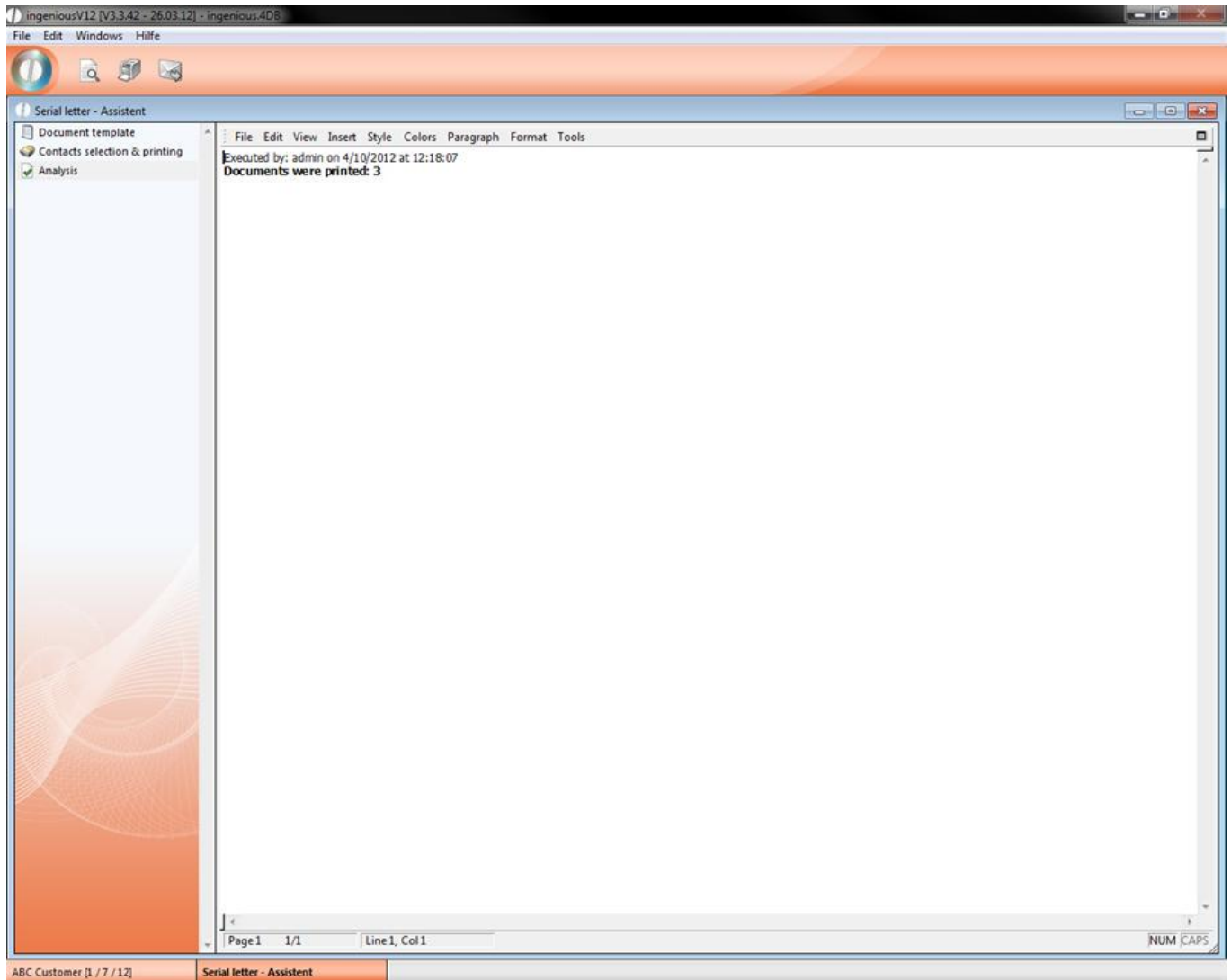



Next click on “Contact Selection & Printing” and drag the desired contact file with the Drag & Drop function to the right field. For serial letter printing, you can specify to which printer the documents should be sent.



Click on the print icon  and confirm the window displayed with "OK".

If you would like to send the announcement via email to your contacts, enter a reference in the area below and specify in which format the email should be sent. Additionally, you can attach another document to your email such as a map, for example. To do this, click on the  icon and select the respective file.



Then click on the  button to start the email dispatch. In the following dialog window, confirm again that you would like to send the emails. In the event that there is not an email attached to every contact, you can specify that a letter should be printed for these contacts. After printing or mailing your letter, you will receive a report under the column "Summary" regarding the printing or mailing success.

3.1.2 The contacts detail view

3.1.2.1 Contact data

Click in the contact list view by double-clicking on the contact "Friedrich" for example and the customer detail view will open. In the data selection area, you can for example, enter data such as Address, Telephone, Fax and E-Mail.

The screenshot displays the 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408' application window. The interface is divided into a left sidebar and a main content area. The sidebar contains a tree view with categories like 'Contact data', 'Additional addresses / Trips', 'Financial data / Classification', 'Special prices', 'CRM information', 'Documents & Dates', 'own fields', 'File attachments', 'Webservices', and 'Show projects'. The main content area is titled 'Contacts detail view [Ingenious]' and contains several sections: 'Miscellaneous' with fields for 'Matchcode' (Ingenious), 'Customer number' (15529), 'Company / Name' (Ingenious), 'Street' (Beethovenstrasse 14), 'Country' (USA), 'State', 'ZIP' (04107), 'City' (Leipzig), 'Contact person', 'Salutation' (Dear Mr. & Mrs.), 'Communication' with 'Phone' (+49 341 226210), 'Fax' (+49 341 2262120), 'Email', and 'WWW' (www.ingenioususa.com), and 'Notes' with a 'PinUp note' field. At the bottom, there are 'Created' and 'Modified' timestamps and a 'Show notes in project' checkbox.

Detail view of a record

As seen above, the detail view consists primarily of the data selection area (left) and the detail area (right). The detail area can consist of protected input fields (blue font), unprotected input fields, buttons, pop-up lists, so called pop-up fields and clickable selection fields. Protected input fields contain important data such as the match code (the name of the record) or the customer number that cannot be doubly assigned. In order to avoid coincidental changes of these data, these fields are protected. If you want to change the data anyway, it is necessary to double-click on the text in blue of an input field. The field is already unlocked and you can then make your transaction.

Behind the button "Contact type", a selection menu is hidden. Here you can easily arrange the respective contact. If your PC has Internet access and the necessary software (Web-browser, E-Mail program) installed, you can use the buttons to.

The screenshot displays the 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408' application window. The interface includes a menu bar (File, Edit, Contacts, Print, Print preview, Windows, Hilfe) and a toolbar with various icons. A left sidebar lists navigation options: Contact data, Additional addresses / Trips, Financial data / Classification, Special prices, CRM information, Documents & Dates, own fields, File attachments, Webservices, and Show projects. The main area is titled 'Contacts detail view [Ingenious]' and contains several sections: 'Miscellaneous' with fields for Matchcode (Ingenious), Customer number (15529), Company / Name (Ingenious), Street (Beethovenstrasse 14), Country (USA), State, ZIP (04107), City (Leipzig), Contact person, and Salutation (Dear Mr. & Mrs.); 'Communication' with fields for Phone (+49 341 226210), Fax (+49 341 2262120), Email, and WWW (www.ingenioususa.com); and 'Notes' with a 'PinUp note' text area. A 'Contacttyp' panel on the right shows checkboxes for Prospect, Customer (checked), Employee, Supplier, and Manufacturer, with 'Abort' and 'OK' buttons. At the bottom, a status bar indicates 'Created 4/25/2007 15:50:57 - jaeger' and 'Modified 3/16/2012 08:19:41 - admin'.



Send E-Mail to the contact

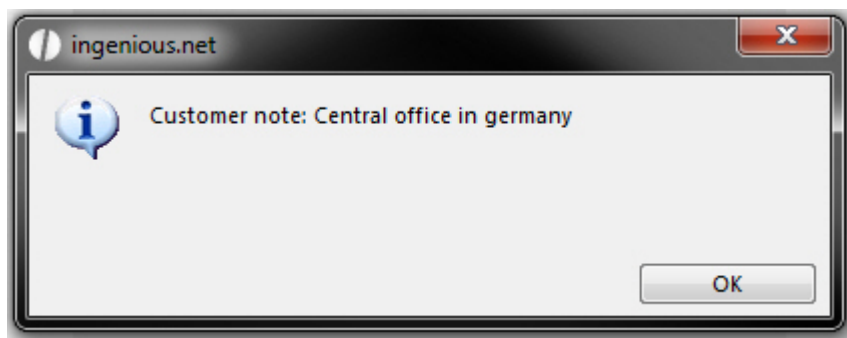


Open the contact's website

With the input field, "PinUp Note" you are in a position to add notes to each contact.

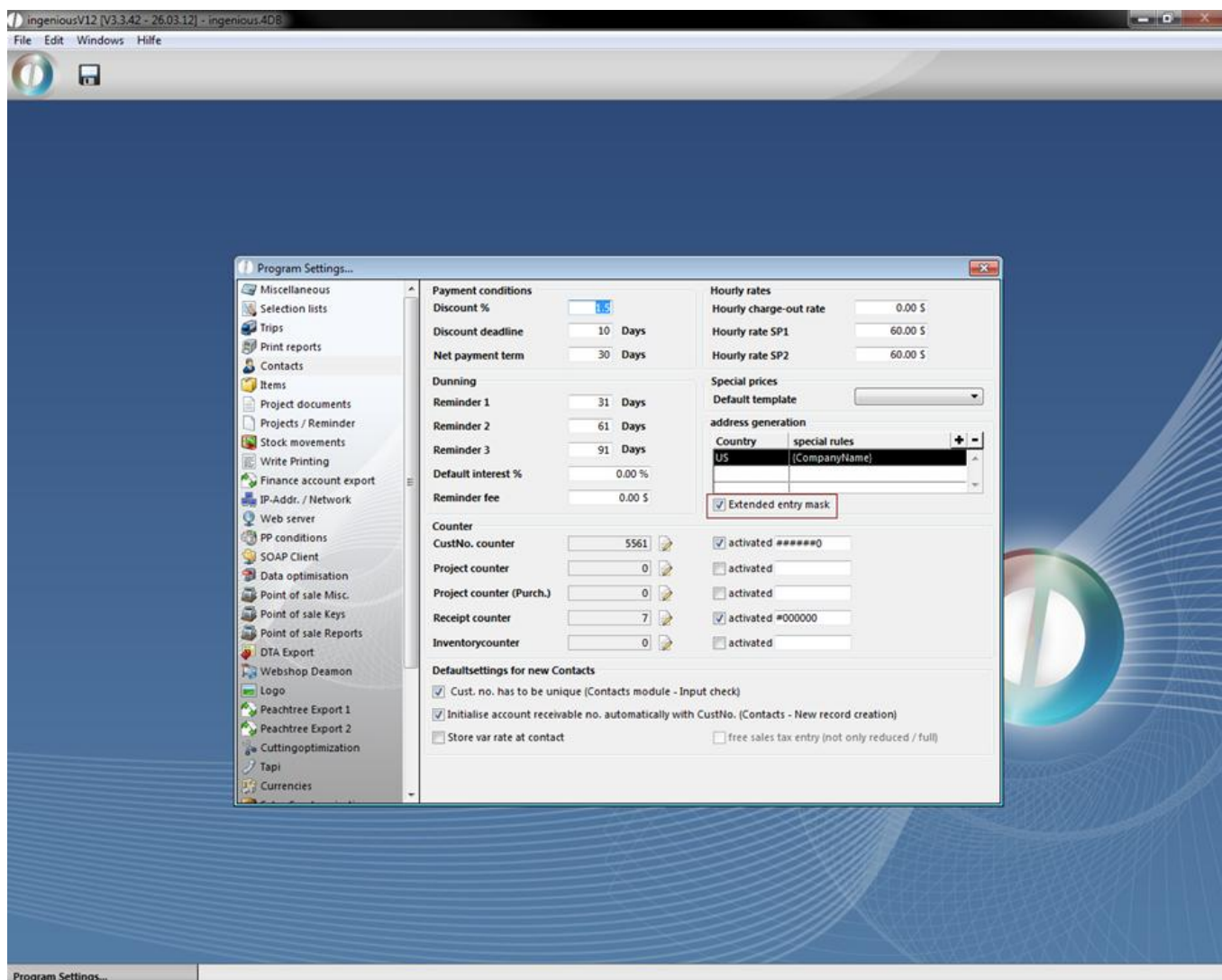
The screenshot displays the 'Contacts detail view' for a contact named 'Ingenious'. The interface includes a sidebar with navigation options: Contact data, Additional addresses / Trips, Financial data / Classification, Special prices, CRM information, Documents & Dates, own fields, File attachments, Webservices, and Show projects. The main area is divided into sections: Miscellaneous, Communication, and Notes. The Miscellaneous section contains fields for Matchcode (Ingenious), Customer number (15529), Company / Name (Ingenious), Street (Beethovenstrasse 14), Country (USA), State, ZIP (04107), City (Leipzig), Contact person, Salutation (Dear Mr. & Mrs.), and Birthday (00/00/00). The Communication section includes Phone (+49 341 226210), Fax (+49 341 2262120), Email, and WWW (www.ingenioususa.com). The Notes section shows a PinUp note: 'Central office in germany'. At the bottom, there is a checkbox for 'Show notes in project' and a status bar indicating 'Created 4/25/2007 15:50:57 - jaeger' and 'Modified 4/10/2012 12:34:07 - admin'.

When you click on the small box "Display notes according to project", notes will be displayed when creating a new project.



Extended entry mask

You have also the opportunity to use the extended address entry mask, where first name, last name, company and district are displayed. To be able to use it, you only have to check the field "Extended entry mask" in the program settings in the category "Contacts" and restart ingenious.V12. Please note, that after checking the field the field "Company/Name" is hidden.



Program settings

The screenshot displays the 'Contacts detail view' for a contact named 'Frank Everybody'. The interface is organized into several sections:

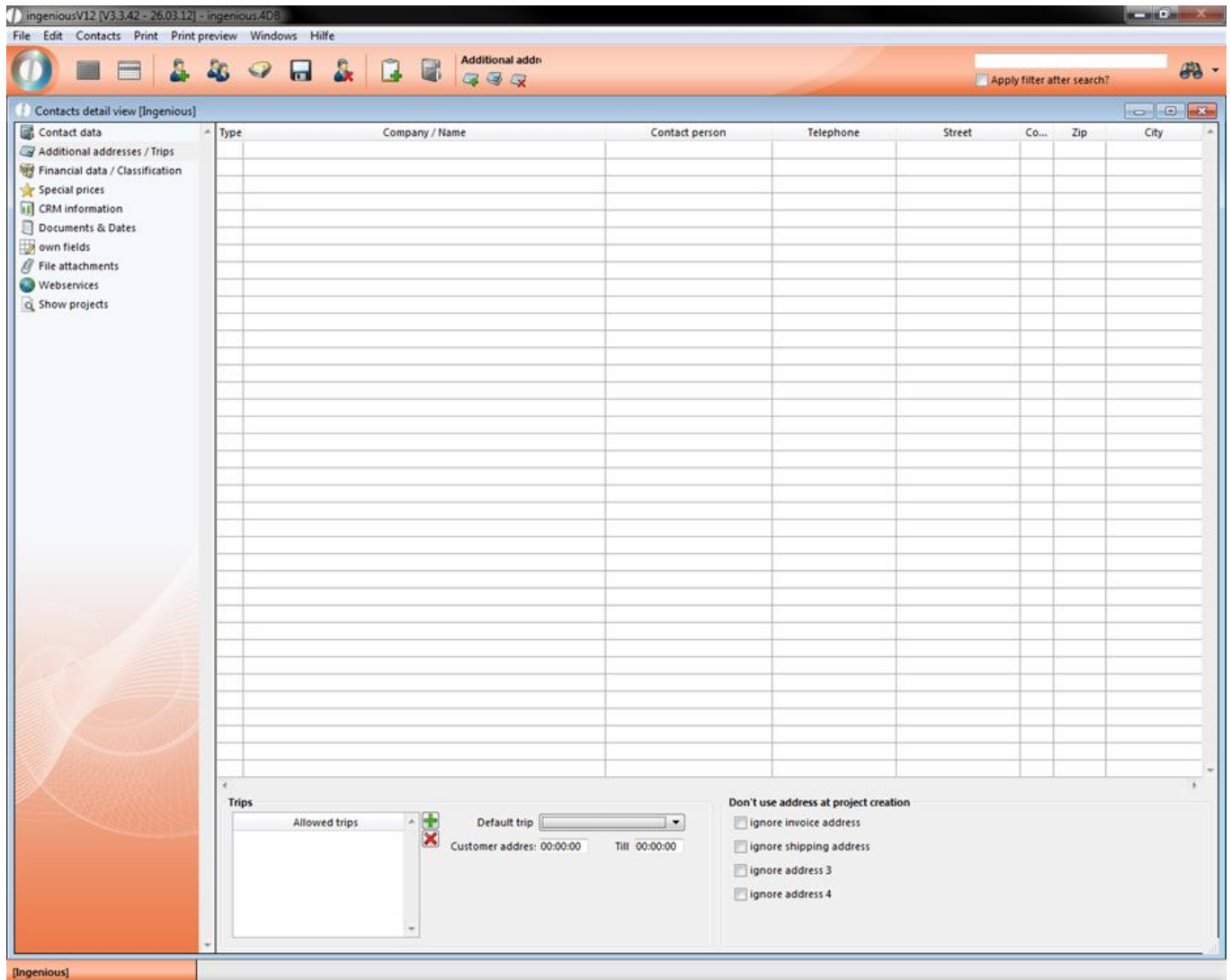
- Miscellaneous:** Fields for Name (Everybody), Forename (Frank), Title1, Title2, Company, Company2, Street (123 Main Street), Country (US), State (IL), ZIP (12345), City (Chicago), District, and Birthday (00/00/00).
- Communication:** Fields for Phone (+1 789 4561230), Fax, Email, and WWW.
- Notes:** A section for PinUp notes with a 'Show notes in project' checkbox.
- User defined List:** A table with columns 'Name' and 'Value', containing the entry 'Frank Everybody'.


The bottom of the window shows the 'Created' date (4/25/2007 16:07:00 - cjaeger) and the 'Modified' date (3/14/2012 14:20:01 - admin).

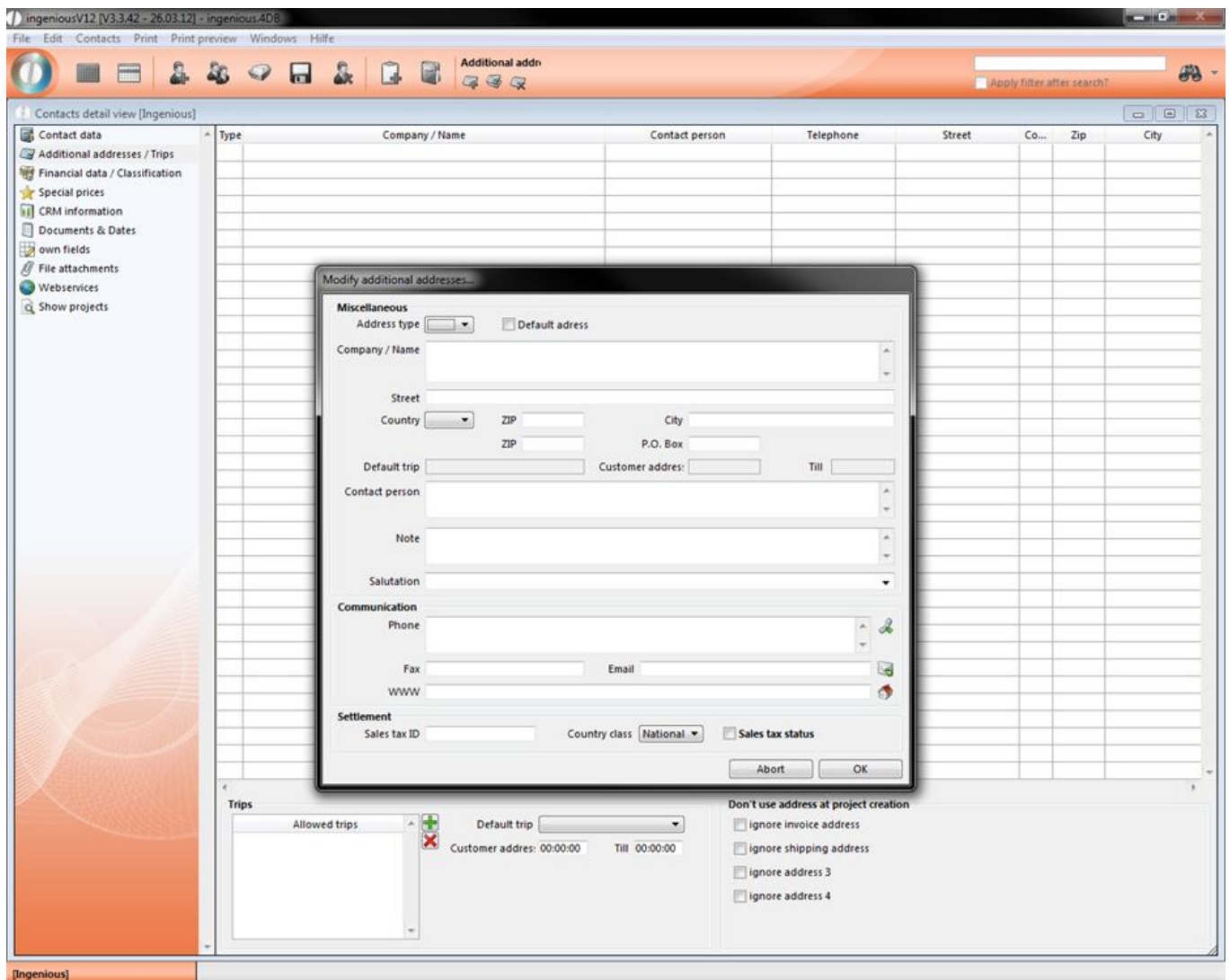
Example of the extended entry mask

3.1.2.2 Additional addresses



Under the area "Additional Addresses/Trips", you can add other possible company addresses or basic addresses, such as possible delivery Trips, to the existing contact information.

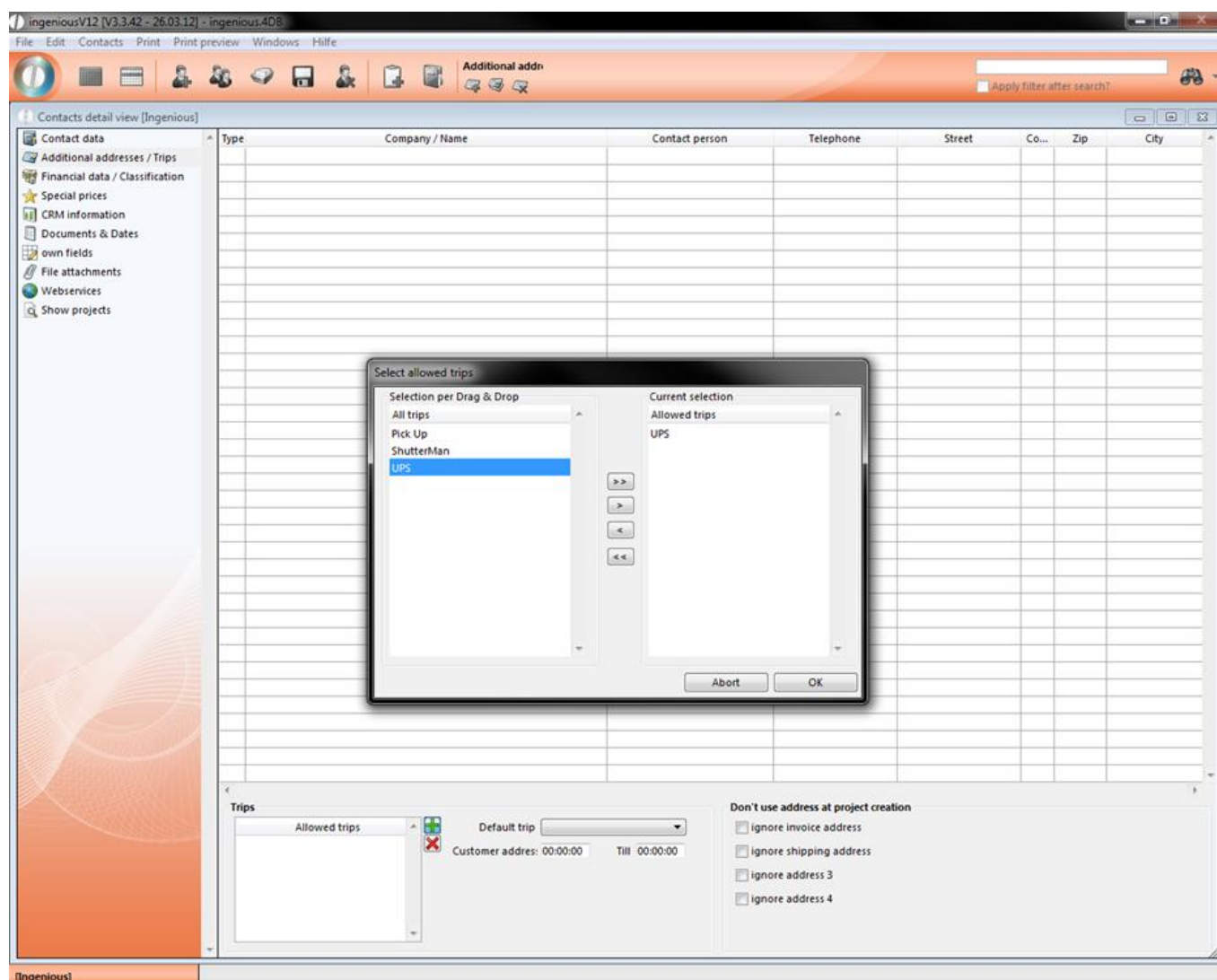



In order to add an additional address, click on the icon  "Add new address". In the window that appears, you can indicate an address, contact, contact forms and accounting modalities. You can open the data entered here when printing the project documents with the pertinent placeholders.

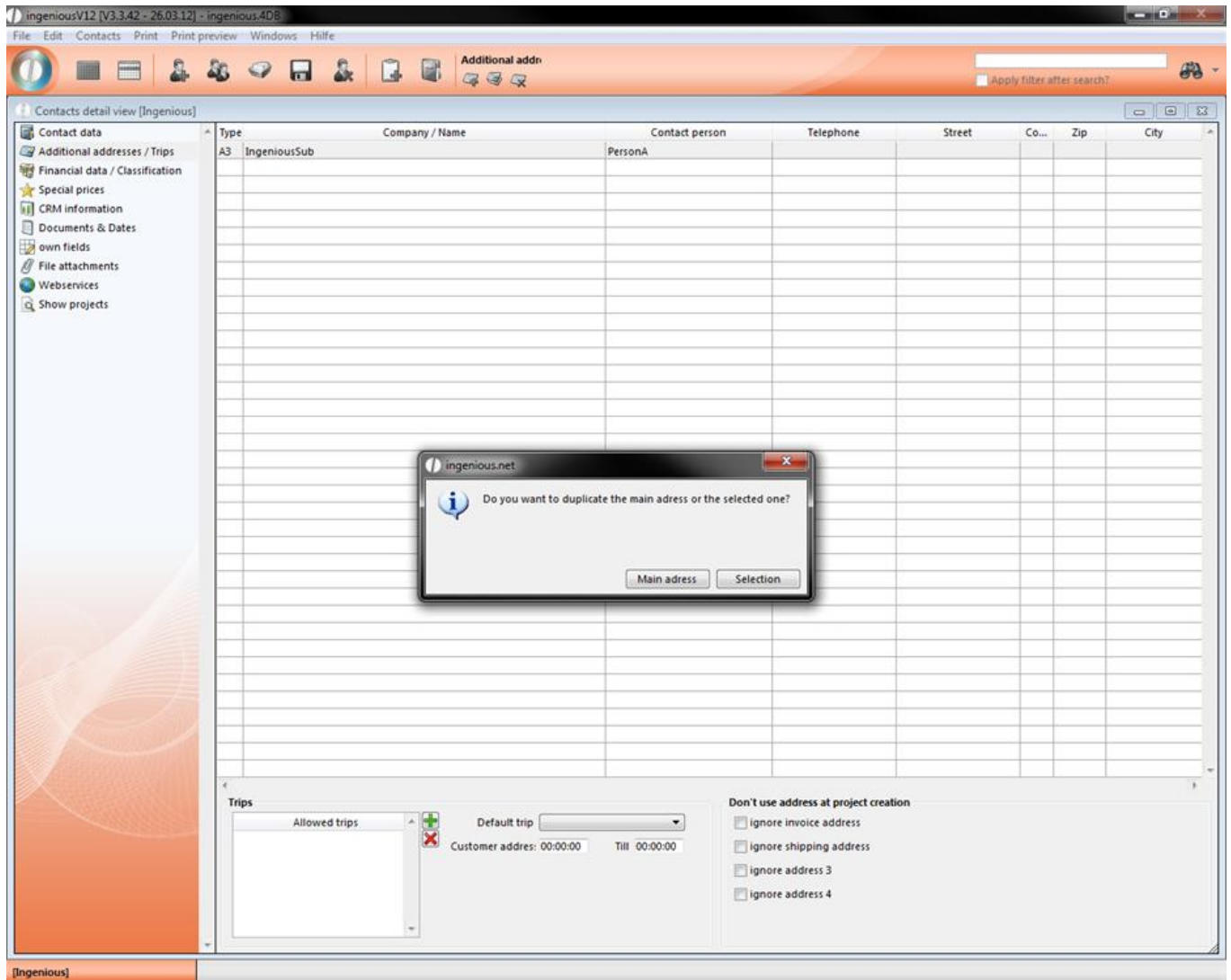


In the lower part of the detail view, the standard Trip will be specified, and other allowed trips can be offered. You can provide the trips and the pertinent delivery dates in the program settings.

You can add an admissible trip with the  button and delete it with the  button. In the window "Select allowed trips", you can now pull the desired route with the Drag & Drop function into the right window.



When you want to create a additional address, you can also duplicate the main address of the contact or an already created one by clicking the  button.



3.1.2.3 Financial data Classification

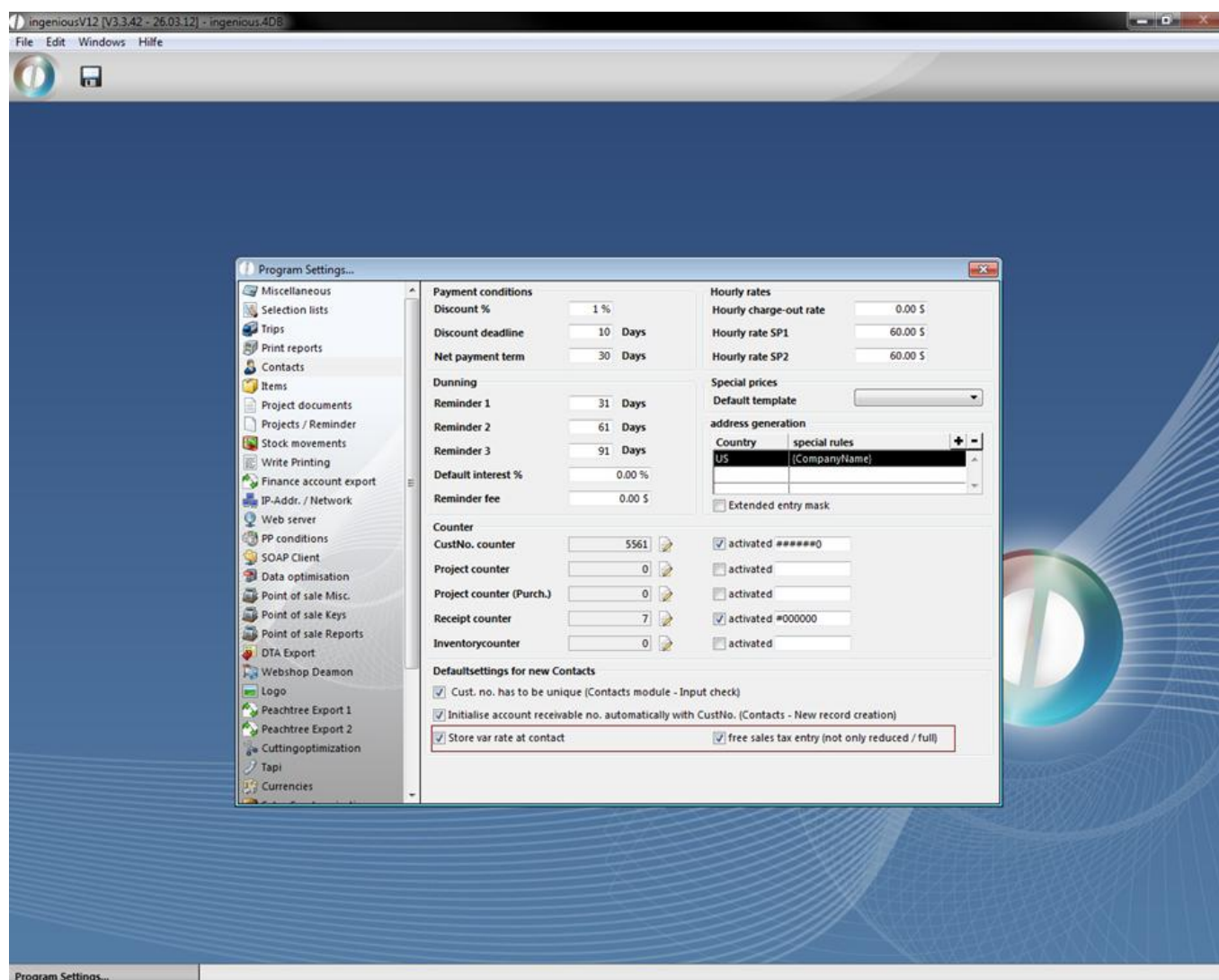
Here you can store all relevant financial data with your contact file. In the column "Classification", you can assign the contact, quickly and easily and without much typing, to a specific area or a specific payment method, thanks to the pop-up fields. With the help of the pop-up window group, each contact can be filed into each contact group very easily. For instance they can be filed into the commercial, private or sun protection areas. You can set up the contents of the selection lists (pop-up fields) yourself in the Ingenious.V12 program settings. In the column "Accounting" you can, among other things, specify the currency and set two different work hour records for each individual contact. The column "Payment Method" gives you the possibility to define the payment behavior and also possibly a discount. This is done through the "BLOCKED" field where you can block a contact. You can also set limitations for possible outstanding payments with the field "Limit check" that will review for you. In the column, "Dunning", you can determine after how many days the first, second and third payment, and also which collection fees and default interest, are due. In the "Bank details" column, the basic data for charges or transfers are available.

The screenshot displays the 'Contacts detail view' for 'Ingenious Shutter'. The interface includes a sidebar with navigation options like 'Contact data', 'Financial data / Classification', 'Special prices', 'CRM information', 'Documents & Dates', 'own fields', 'File attachments', 'Webservices', and 'Show projects'. The main form is divided into several sections:

- Classification:** Client (Ingenious Shutter), Meth. of (Checks), Group (Lead), Area (East), Representative (Peter Fox), Provisionsgruppe.
- Settlement:** Account receiv. no. (15529), Hourly rate SP1 (60.00 \$), Hourly rate SP2 (60.00 \$), Currency (USD), Sales tax ID, Country class (National), ☒ ID-Check, ☐ Sales tax, Firmregisterno.
- Method of payment:** Payment practice, Discount % (1.50 %), Till disc. deadl. (days) (10), Net payment term (30), ☐ BLOCKED, max. open balance (0.00 \$), ☐ Limit check.
- Dunning:** Dunning run in days (1: 31, 2: 61, 3: 91), Reminder fee (0.00 \$), Default interest % (0.00 %).
- Bank details:** Bank, Bank code, Account number, ☐ Direct debit.
- supplier defaults:** terms of delivery, default form purchase order.
- (ZB) Texts bound to document status:** A table with columns 'Project title' and 'Text'.

Sales tax entry

You are able to store the sales tax directly at a contact. The corresponding setting you find in the program settings in the category "Contacts". Here you can choose between free sales tax entry, reduced or full sales tax rate and no sales tax entry (default). This will make it possible, that you can define the sales tax rate individually per contact (for instance for American contacts, where every state resp. land got an individual sales tax rate).



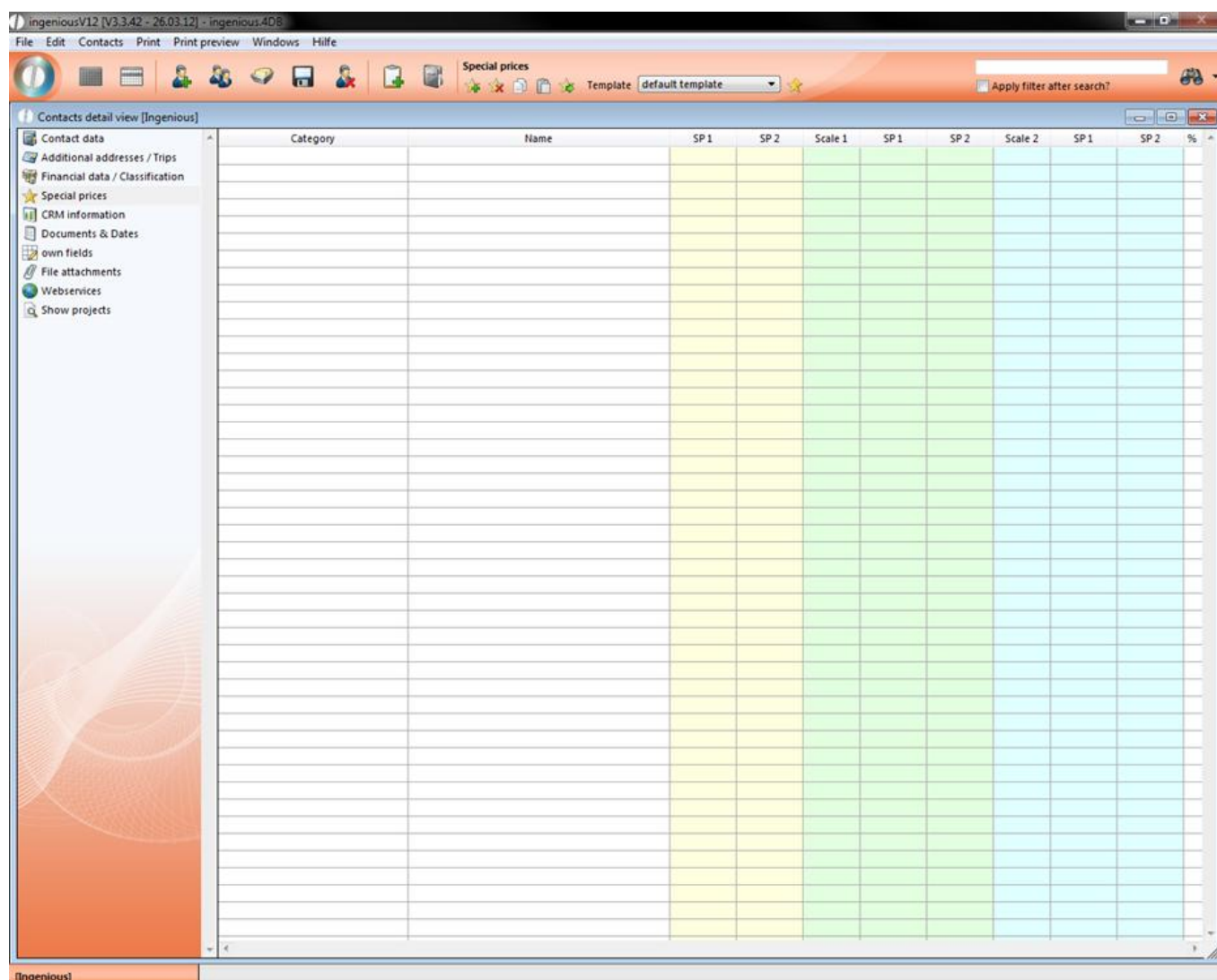
Settings for free input of the sales tax

Free entry of the sales tax

Choose between reduced and full sales tax rate


3.1.2.4 Special prices

In this detail area, you can designate special prices to a contact. In addition, special prices can be copied and removed.

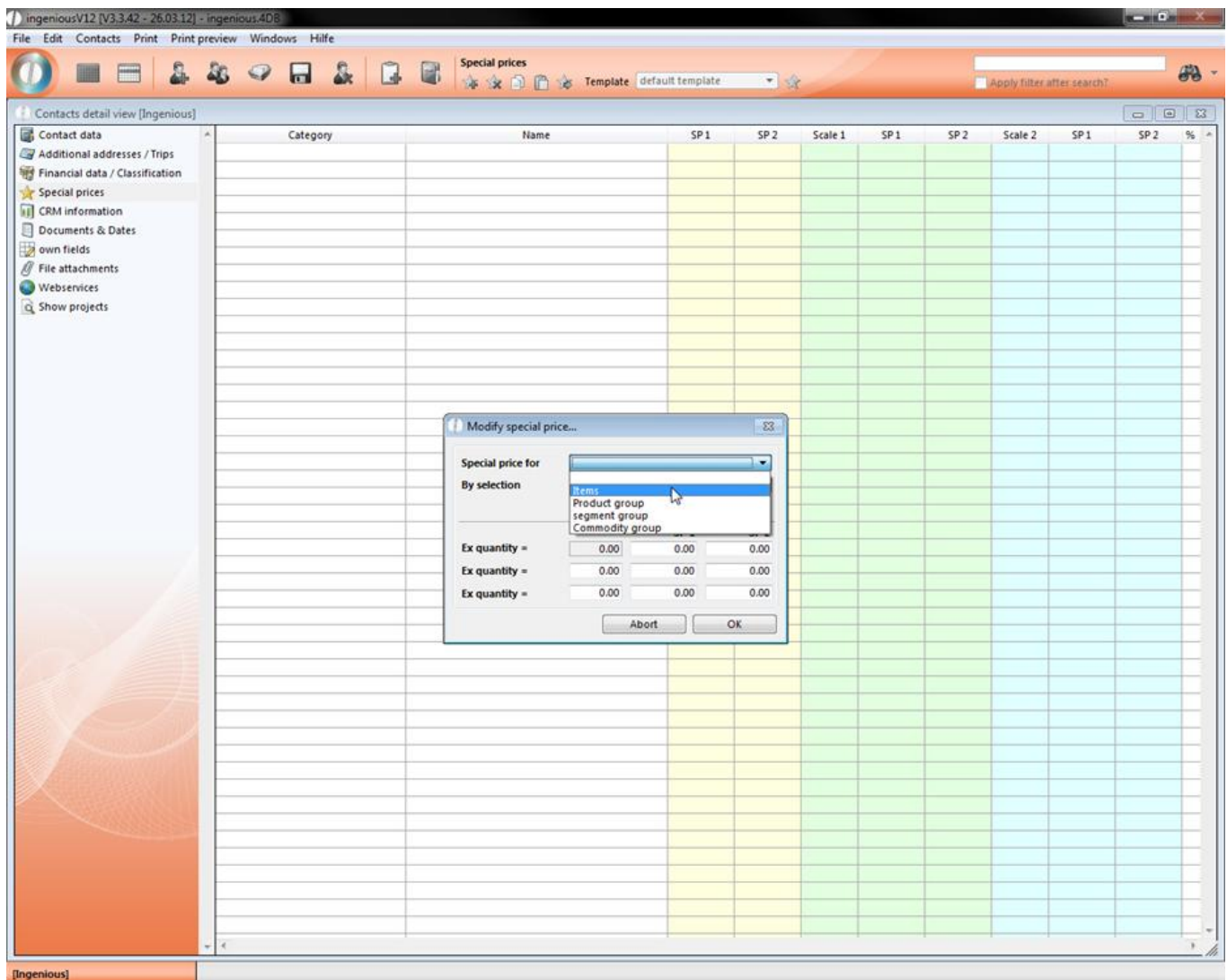


Special prices detail area

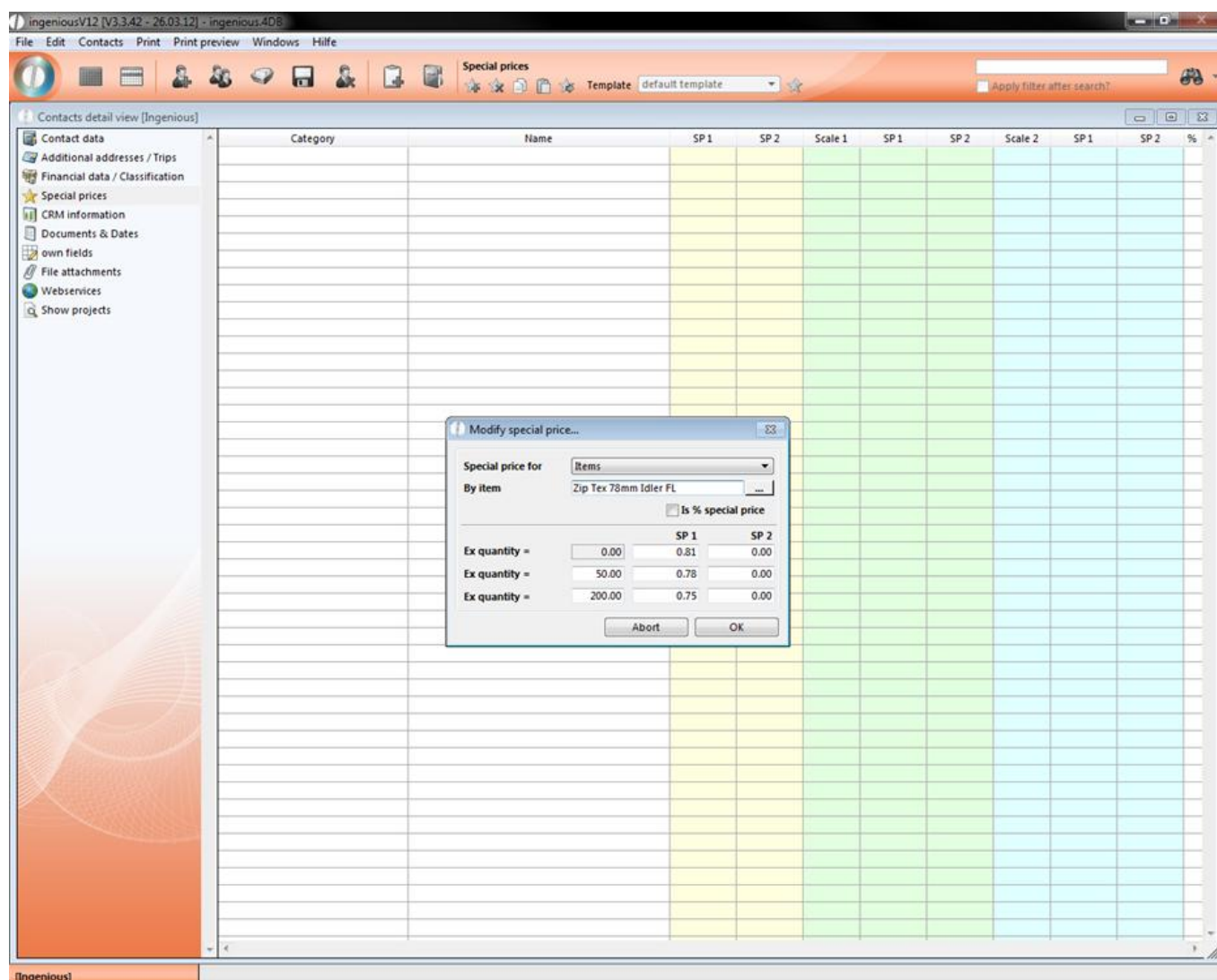
Practice with creating and deleting special prices

1. Click on the  button to create a new special price.

The following window will appear.



2. In the pop-up window shown above, select the special price amount you want to quotation for a "Supplier", a "Commodity Group", a "Product Group" or for a single "Article". In this example, we will select the option "Article".
3. If you don't know the exact description of the article, simply click on the button next to the input field "By article".
4. The article module window will appear. Here the corresponding article can be selected by double-clicking.
5. The article window will close and the corresponding article is listed in the input field. Now you only have to fill out "VK 1" and "VK 2" starting with 0 and two arbitrary quantities.




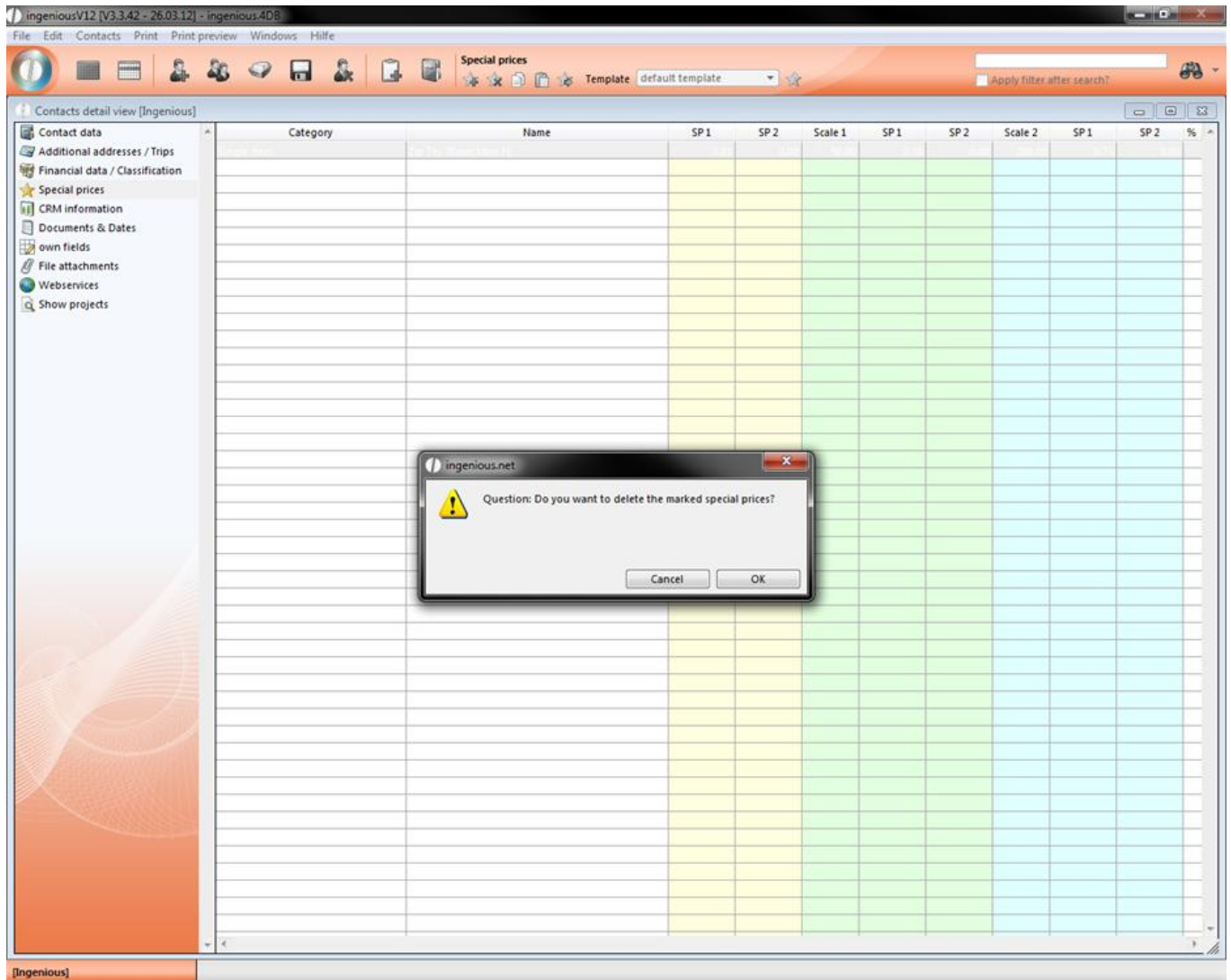
6. After confirming by clicking with your mouse on "OK", or by pressing your enter key on your keyboard, your entries will be saved and the special price will appear in the detail view "Special Prices".

[illegible]


The special price in the special price detail view

In order to delete the special price again, please proceed as follows:

7. Mark the special price with a mouse click. Click on the  button to delete the special price that was marked. Confirm the request with "OK".

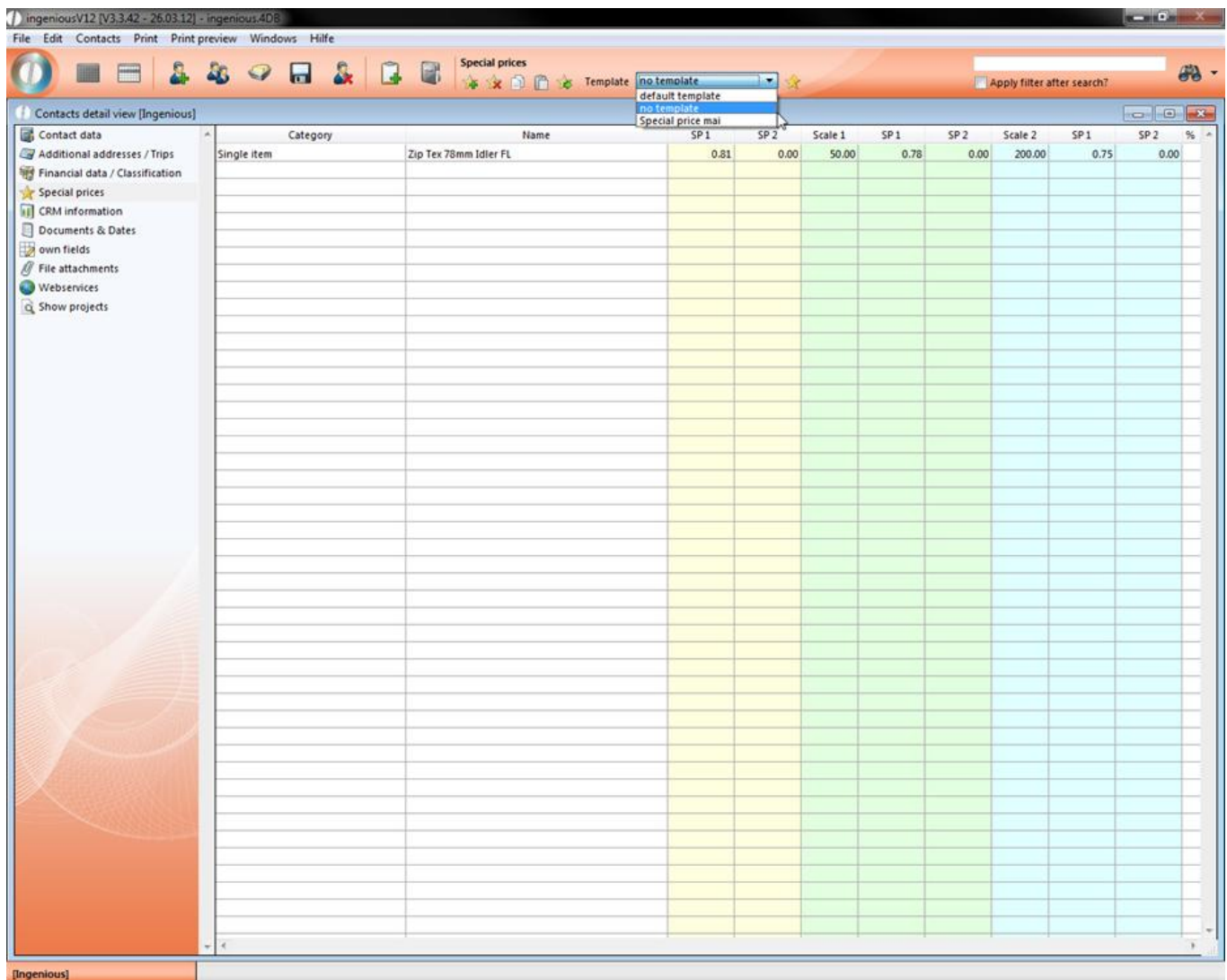


Exporting special prices

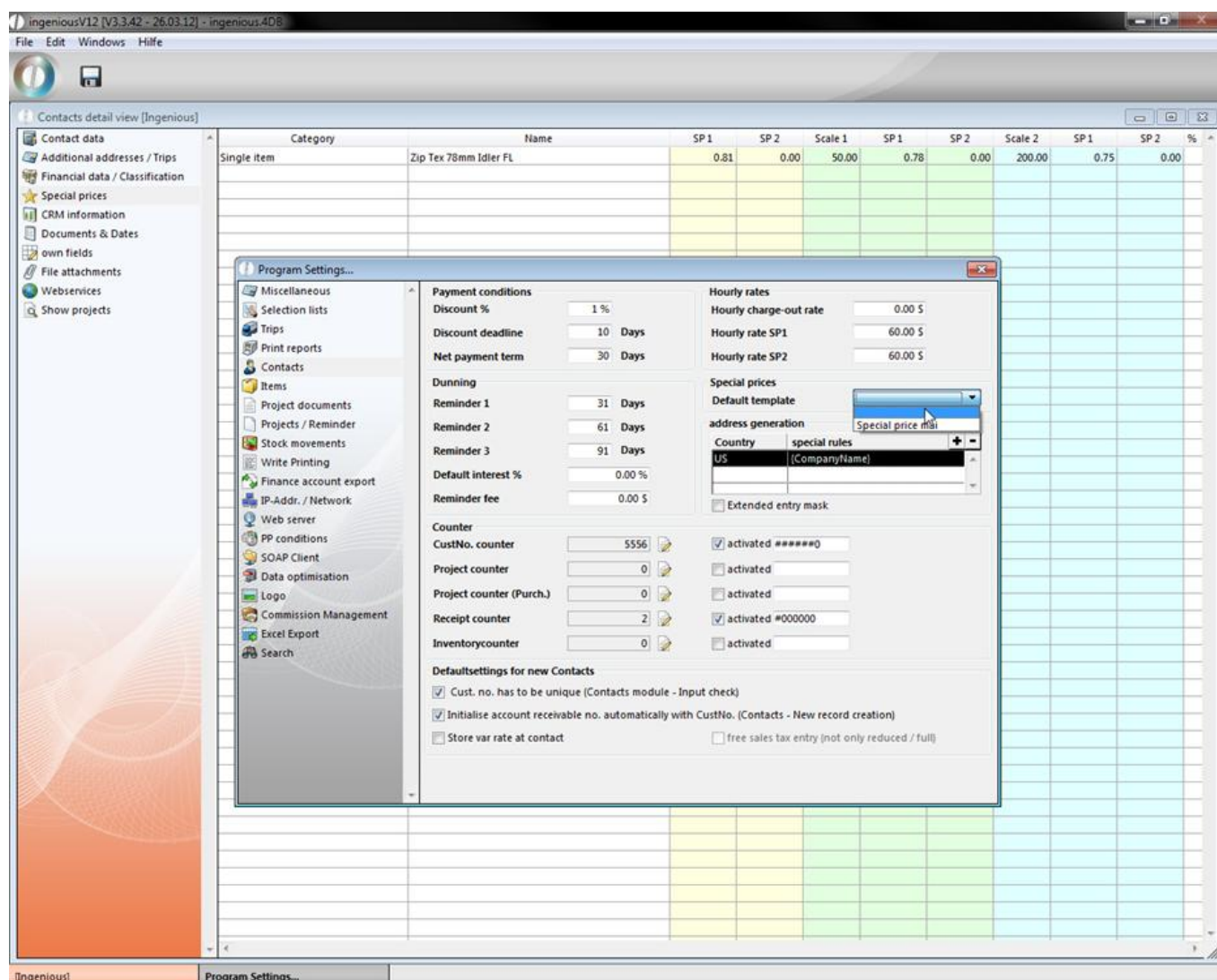
It is possible to export special prices with the  button so that a wholesaler or manufacturer can pass on their fixed special prices to the retailers. Special prices can be imported adequately with the "Program Settings" administrative tool in the "PP terms" area.

Special price templates

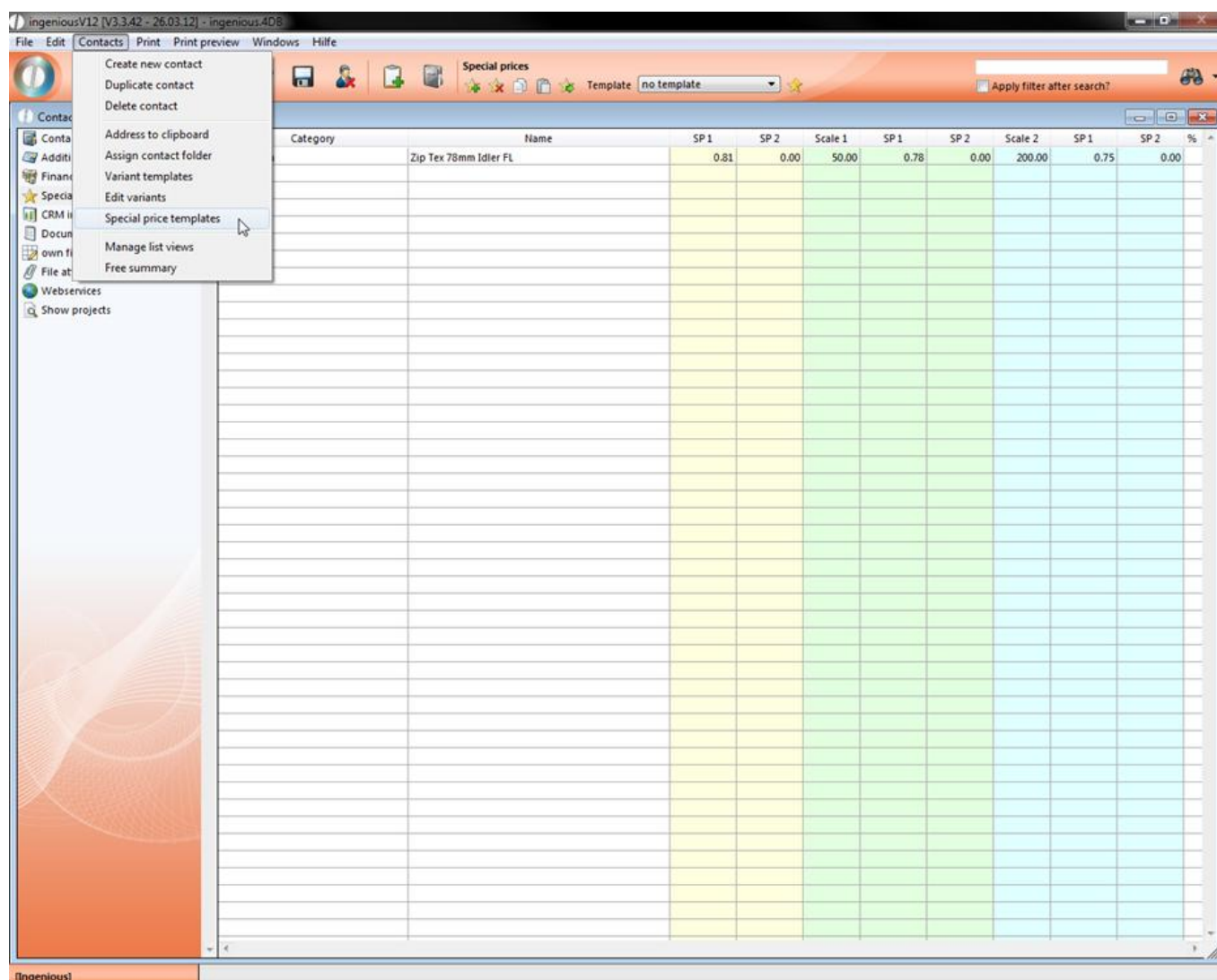
You can also use self-created templates for the special prices. With the help of those it is possible to assign a special price to multiple contacts. This is really efficient for example when you want to do add a special price to a specific contact group. When you click on the popup field you will get a list of all available special price templates that you can add by a simple mouse click.



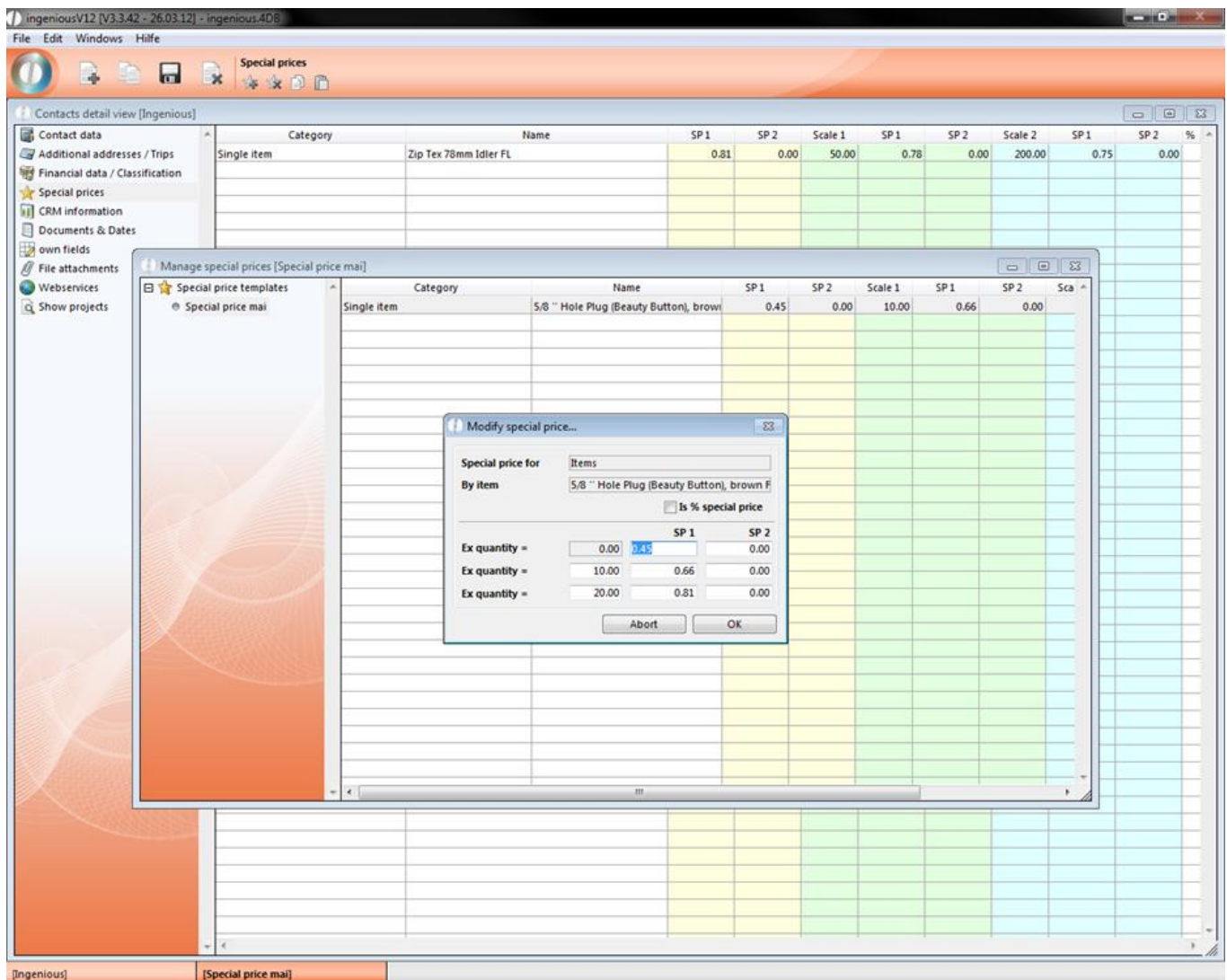
When you select the option “default template” the special price template will be used, that was set in the program settings. There you can choose a template, which will be automatically assigned to every contact that has selected the default template. On that way you have got the opportunity to assign a special price to multiple contacts.








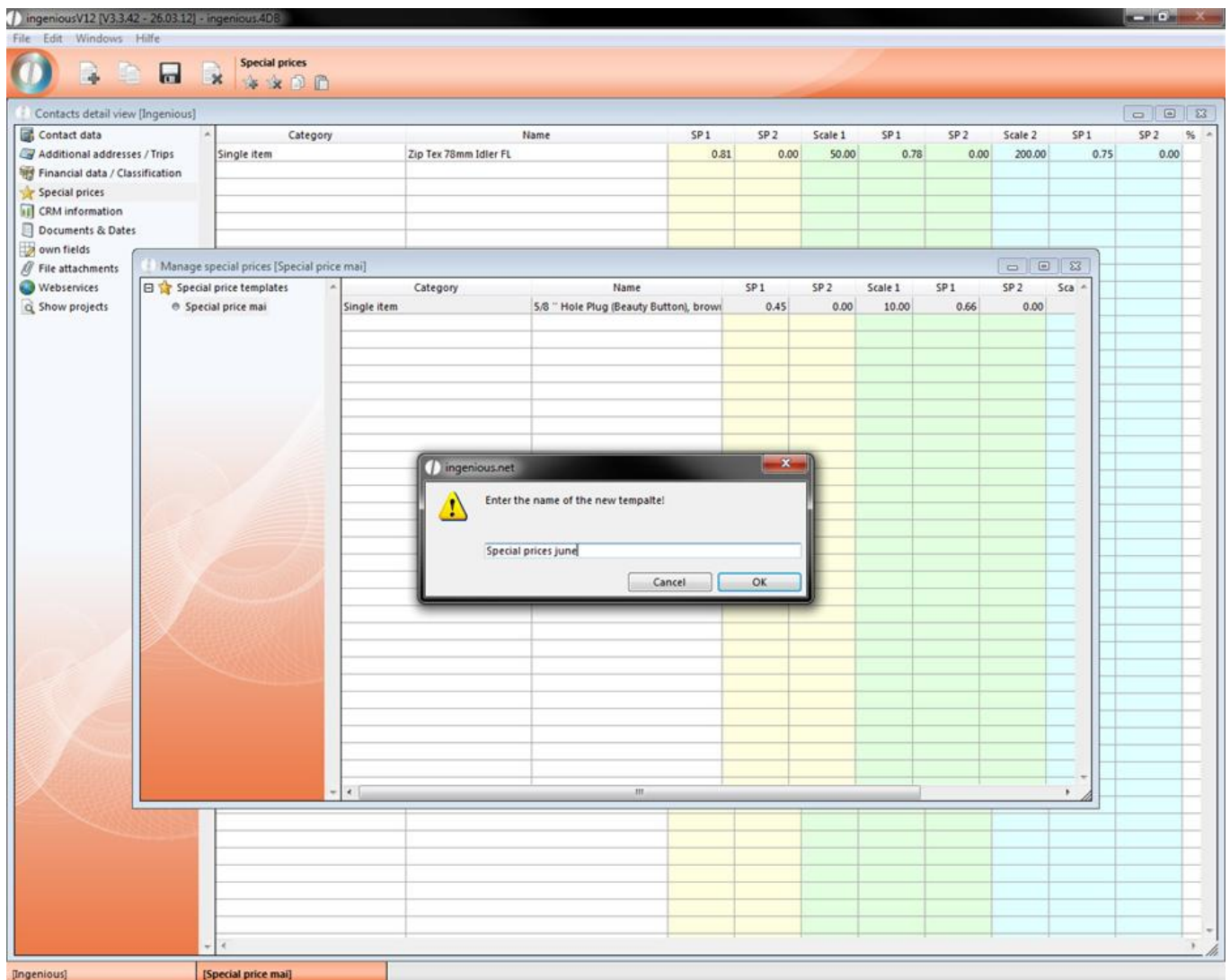
You can create and manage special price templates with the menu "Contacts – Special price templates".



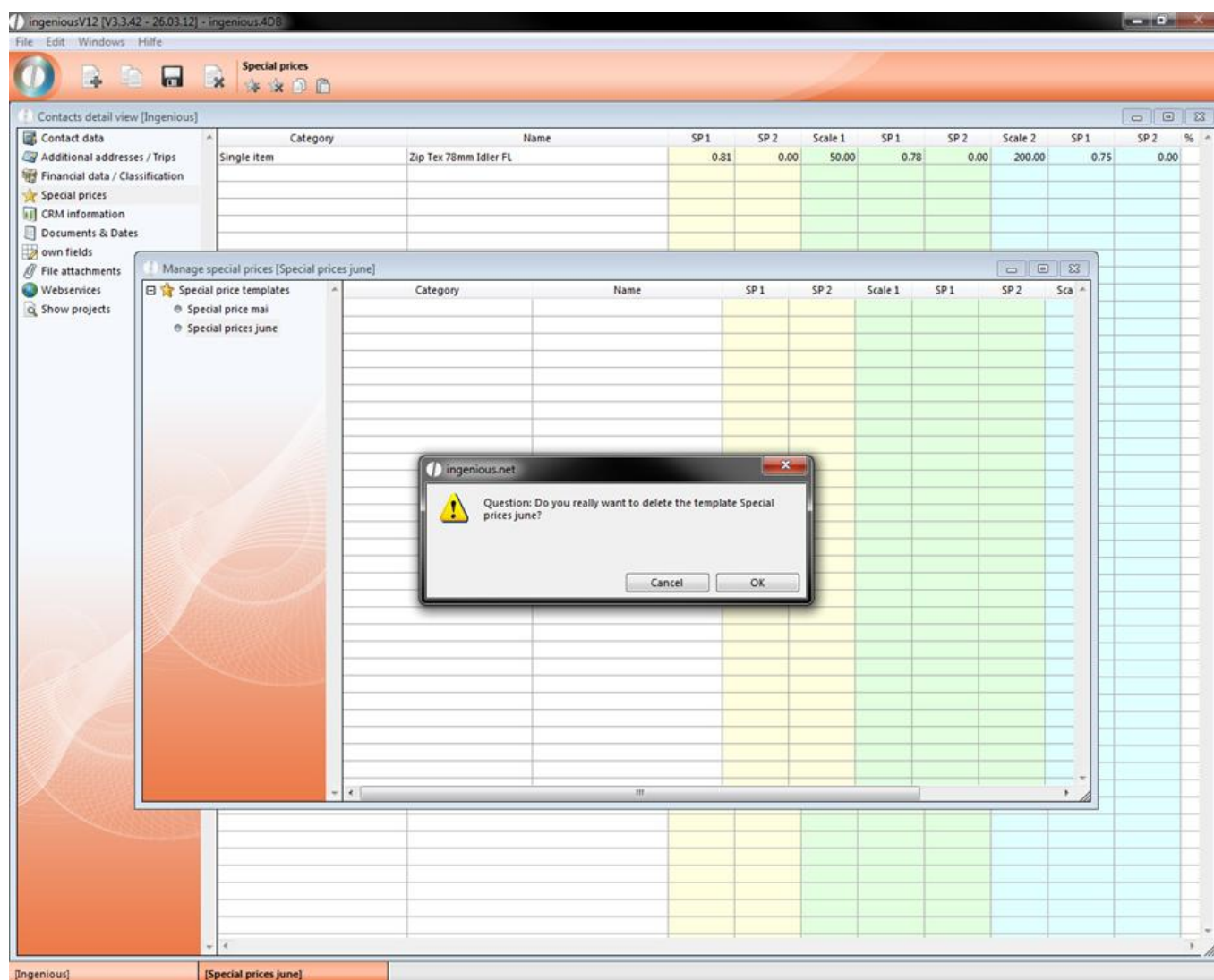
The window "Manage special prices" will open up. In the selection area you can see the already created special price templates. With a click you can choose a specific template and see in the right area which special price items it contains. When you double click an item the special price edit window will open up.




With the help of the buttons in the icon bar you can  add special prices,  delete the selected ones,  copy the selected ones and  paste them. A new special price template you can create by clicking .




A window will open up where you can name the template.





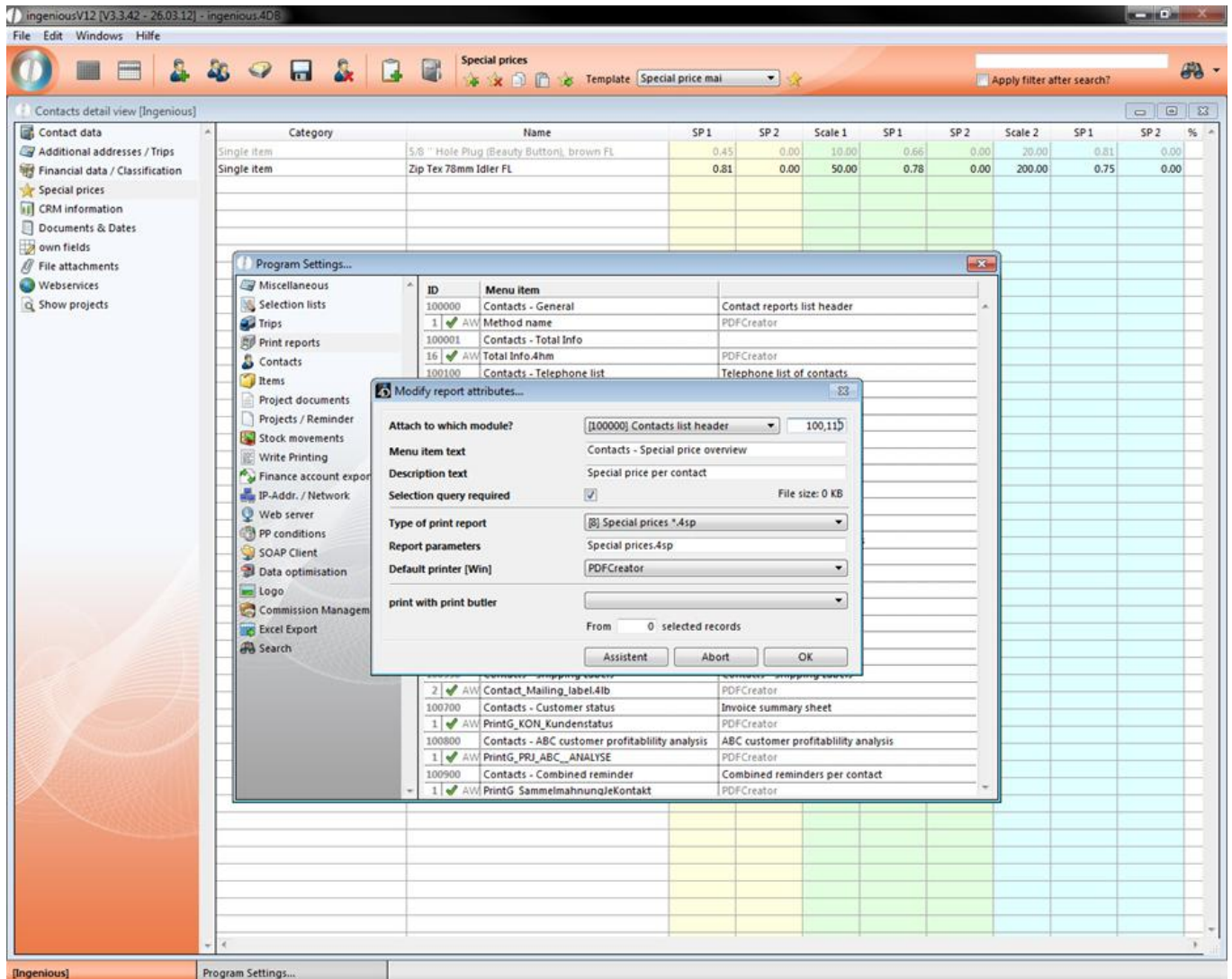
By clicking  you can delete a template.

[illegible]

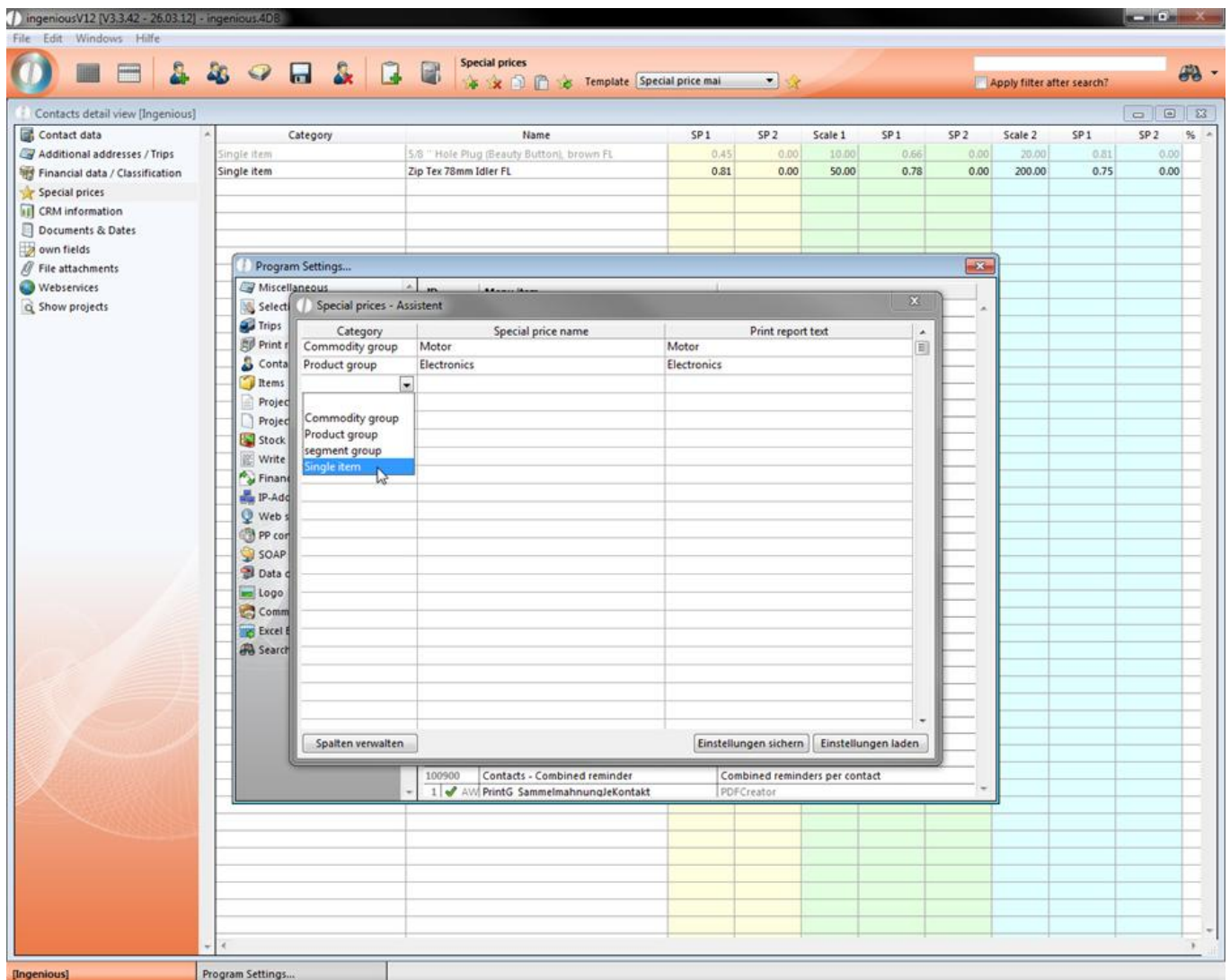
When you add a special price template to a contact the affected items will be displayed grey colored in the list. If an item from the template already has got a special price assigned in the contact, then only the special price from the template will be used. You also have the opportunity to copy a the special prices from the template to the contact with . The items will be added to the contact and will no longer be connected to the template.

Special price assistant

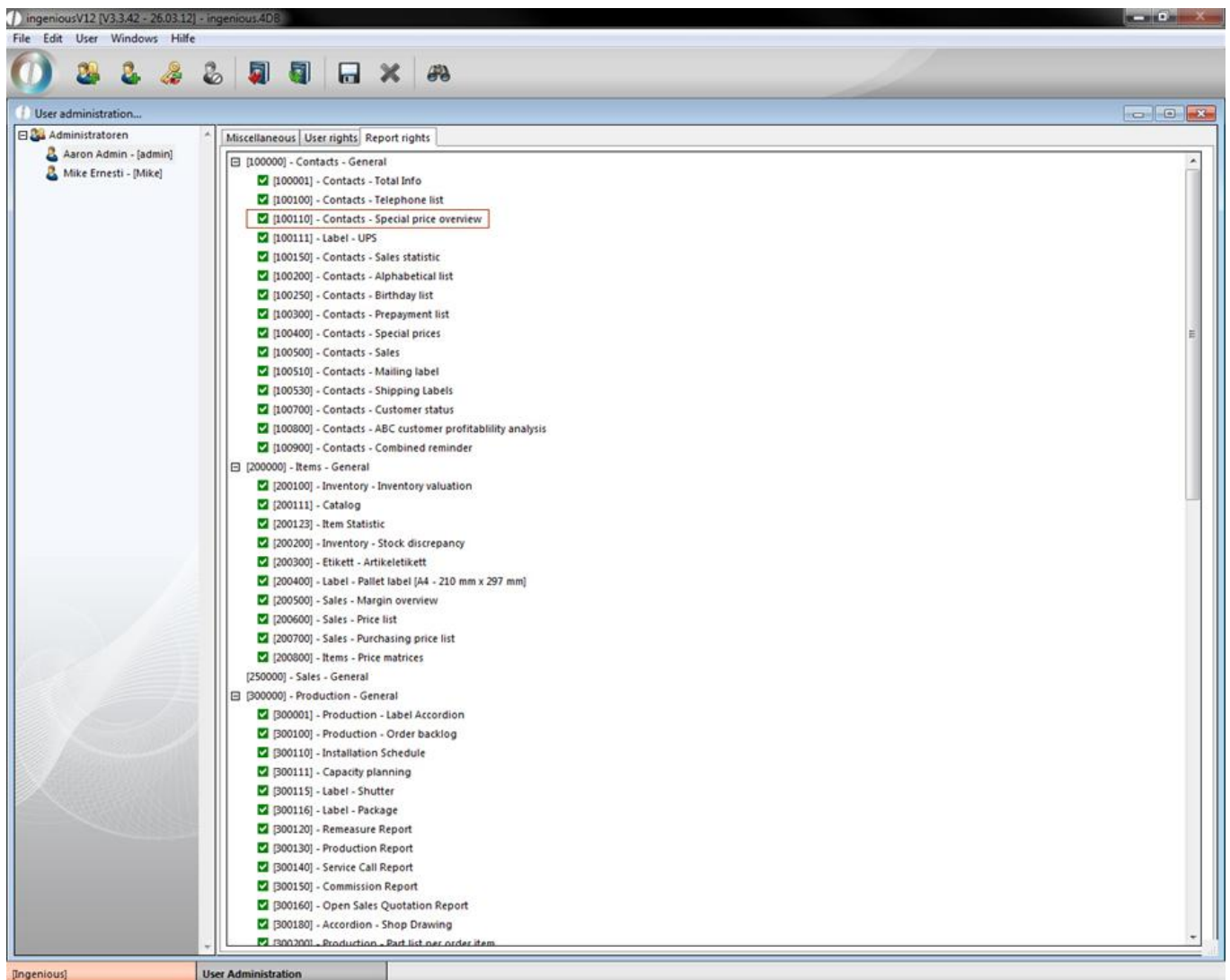
With the help of the special price assistant, you can keep a convenient overview of all customized special prices. In the administrative tool "Program Settings" you will find the column, "Print Reports". With the  button, you can now create a new report. In the field "Attach to which module?" select the option "Contacts list header" and in the field "Type of print report" select the option "Special prices.4sp". After you have filled out the remaining empty fields, open the assistant with the  button.



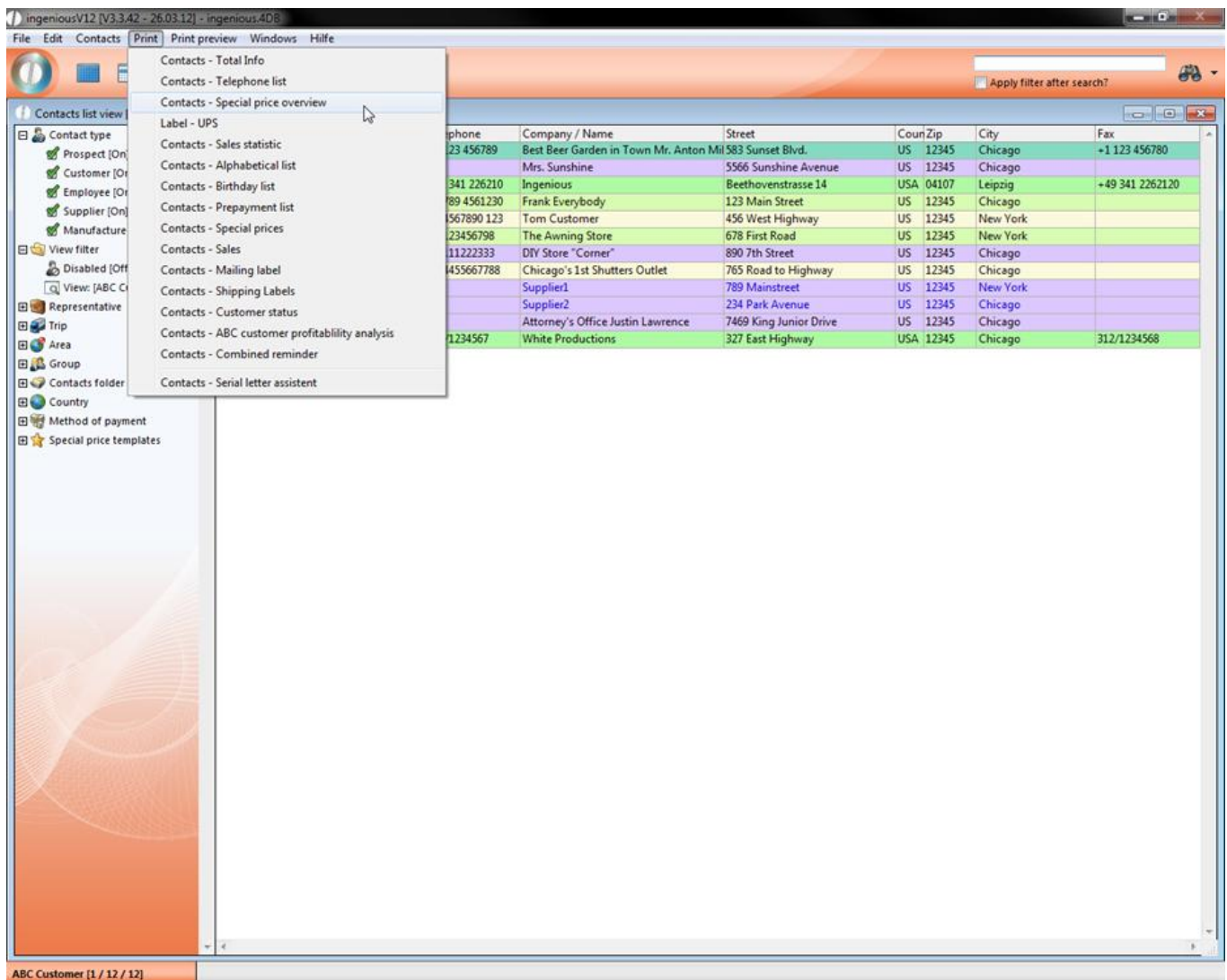
The assistant contains a table with three columns: "Category", "Special price description" and "Text print report". If you click on a cell in the "Category" column, a list field with the selection of options opens: "Commodity Group", "Product Group" and "Single Articles". Now select one of the three groups that will contain special prices. In the column, "Special price description", click on the cell and a list field will open that is oriented towards the group previously selected. If you selected the option "Single articles", you will arrive at the article catalog in which you can select your desired article by double-clicking.



With the "Save settings" and "Load settings" button, you have the possibility to export or import the selection lists. When you have hit all of the settings, leave the assistant and the program settings. Pay attention to the settings when you leave the assistant for security. In order to use the special price assistant, activate the corresponding report rights.



You can finally retrieve the created print report through the "Print" menu in the "Contacts" module.



A spreadsheet analysis window by Ingenious.V12 will open, in which the selected contacts, with the pertinent special prices, are listed. You can now print the list with the "File" menu. In addition, you have the possibility to export the listing as an HTML document.

The screenshot shows the 'Contacts - Special prices' window. It displays a detailed spreadsheet of special prices for a contact. The table includes columns for Matchcode, CustNo., Company / Name, Category, Name, %, SP1, SP2, Scale 1, Scale 1 SP1, Scale 1 SP2, Scale 2, Scale 2 SP1, and Scale 2 SP2. The data shows a single article 'Motor 412 R2' with various special prices and scales.

Matchcode	CustNo.	Company / Name	Category	Name	%	SP1	SP2	Scale 1	Scale 1 SP1	Scale 1 SP2	Scale 2	Scale 2 SP1	Scale 2 SP2
Ingenious	5529	Ingenious											
			Single article	Motor 412 R2	abs.	110.40	100.40	5.00	543.00	1,140.00	10.00	535.00	990.00

3.1.2.5 CRM Information

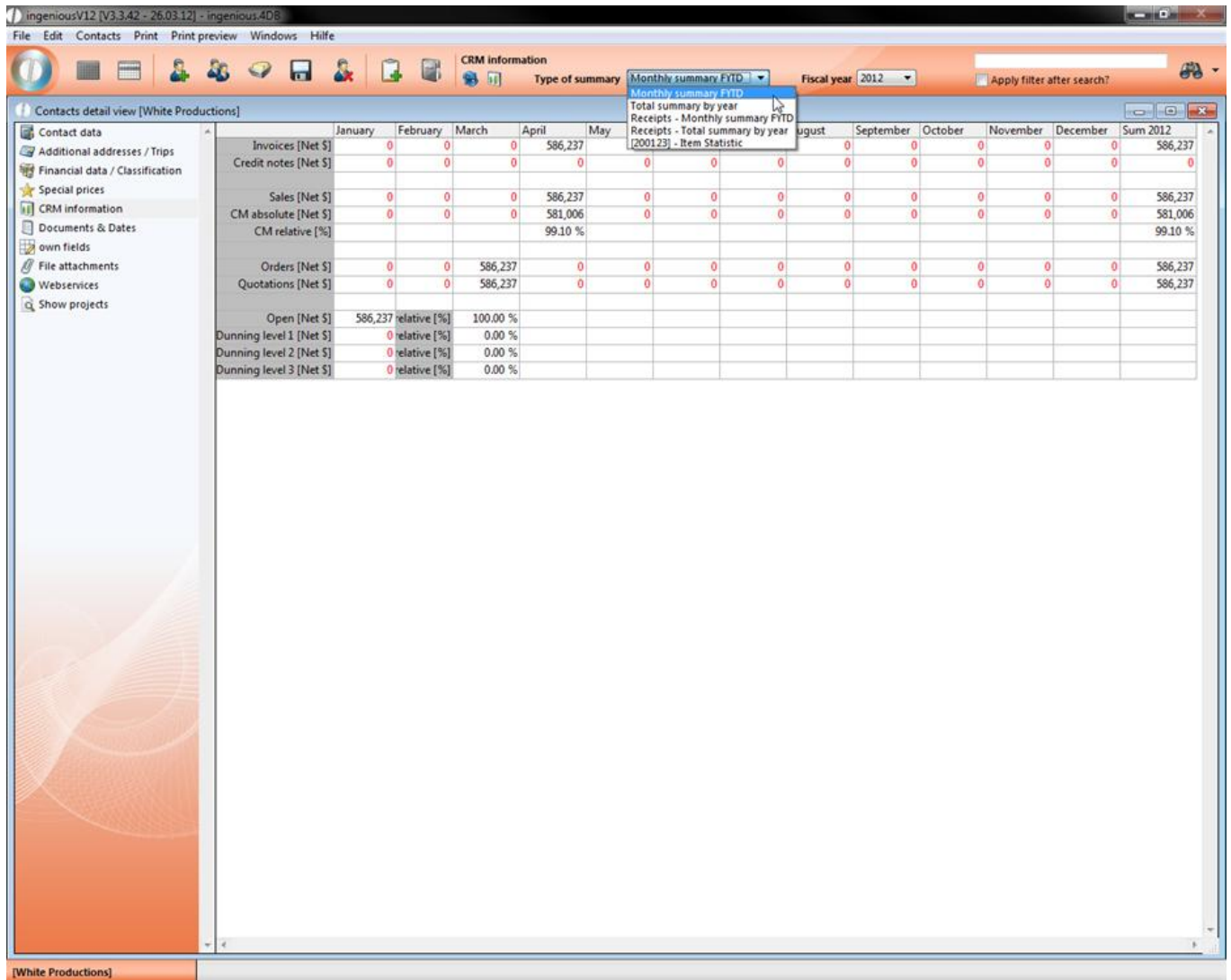
Under the column CRM Information (Customer Relationship Management), Ingenious.V12 quotations you highlights on the most important business figures, such as sales turnover and profit margin. With one glance, you can see the current goods on order, open quotations, or whether the customer has not paid outstanding invoices yet. The period of the analysis can be freely selected.


The screenshot displays the 'CRM Information' window in the ingenious.V12 software. The window title is 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408'. The menu bar includes 'File', 'Edit', 'Contacts', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains various icons for navigation and actions. The 'CRM Information' section is active, showing 'Type of summary' as 'Monthly summary FYTD' and 'Fiscal year' as '2012'. A search filter is set to 'Apply filter after search?'. The main area displays a 'Contacts detail view [White Productions]' with a table of financial data.

	January	February	March	April	May	June	July	August	September	October	November	December	Sum 2012
Invoices [Net \$]	0	0	0	586,237	0	0	0	0	0	0	0	0	586,237
Credit notes [Net \$]	0	0	0	0	0	0	0	0	0	0	0	0	0
Sales [Net \$]	0	0	0	586,237	0	0	0	0	0	0	0	0	586,237
CM absolute [Net \$]	0	0	0	581,006	0	0	0	0	0	0	0	0	581,006
CM relative [%]				99.10 %									99.10 %
Orders [Net \$]	0	0	586,237	0	0	0	0	0	0	0	0	0	586,237
Quotations [Net \$]	0	0	586,237	0	0	0	0	0	0	0	0	0	586,237
Open [Net \$]	586,237	relative [%]	100.00 %										
Dunning level 1 [Net \$]	0	relative [%]	0.00 %										
Dunning level 2 [Net \$]	0	relative [%]	0.00 %										
Dunning level 3 [Net \$]	0	relative [%]	0.00 %										

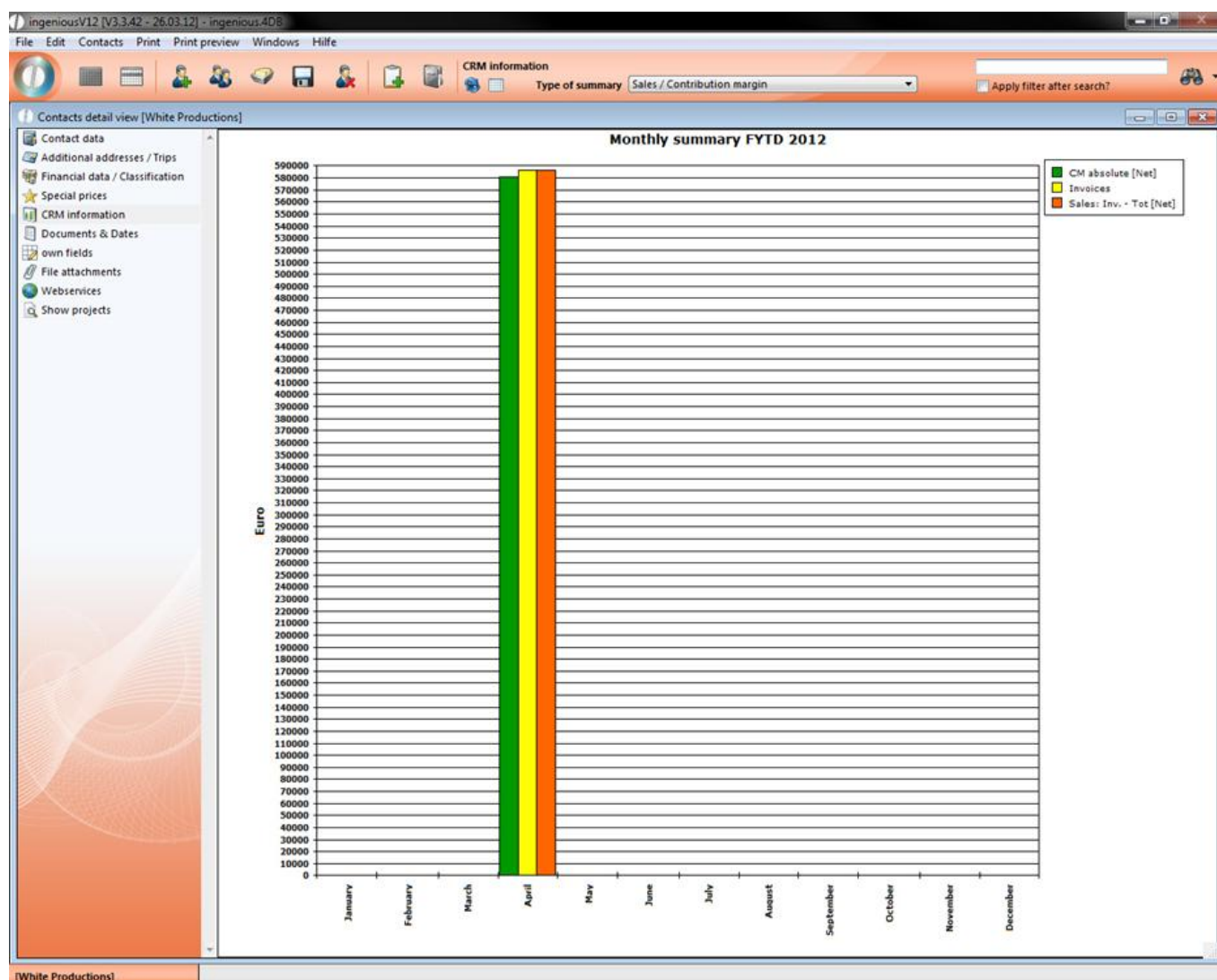
CRM information of a sample contact

You have the possibility to display the business figures with color. You can specify the type of evaluation and the fiscal year. In addition, customized article statistics can be retrieved with the analysis type.

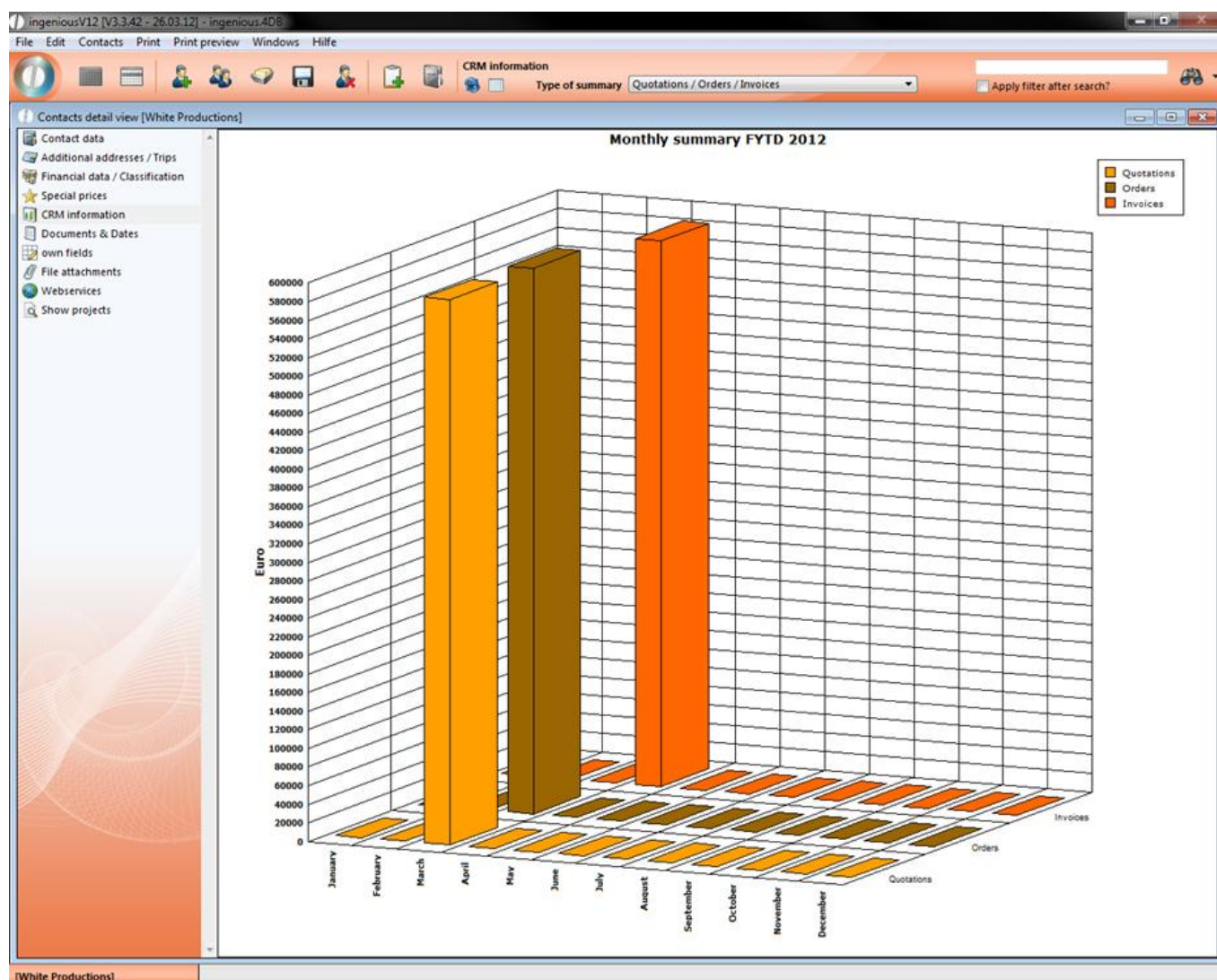


With the  Button "Changes (tabular/graphic analysis)", you will arrive at the different diagrams that also differ after the type of analysis. In the following illustrations, the annual analysis of a sample customer is represented. You of course also have the possibility to leave the diagrams as a monthly statement for one fiscal year. You can also switch again to the tabular view mode and set the "Monthly analysis FY" in the type analysis.

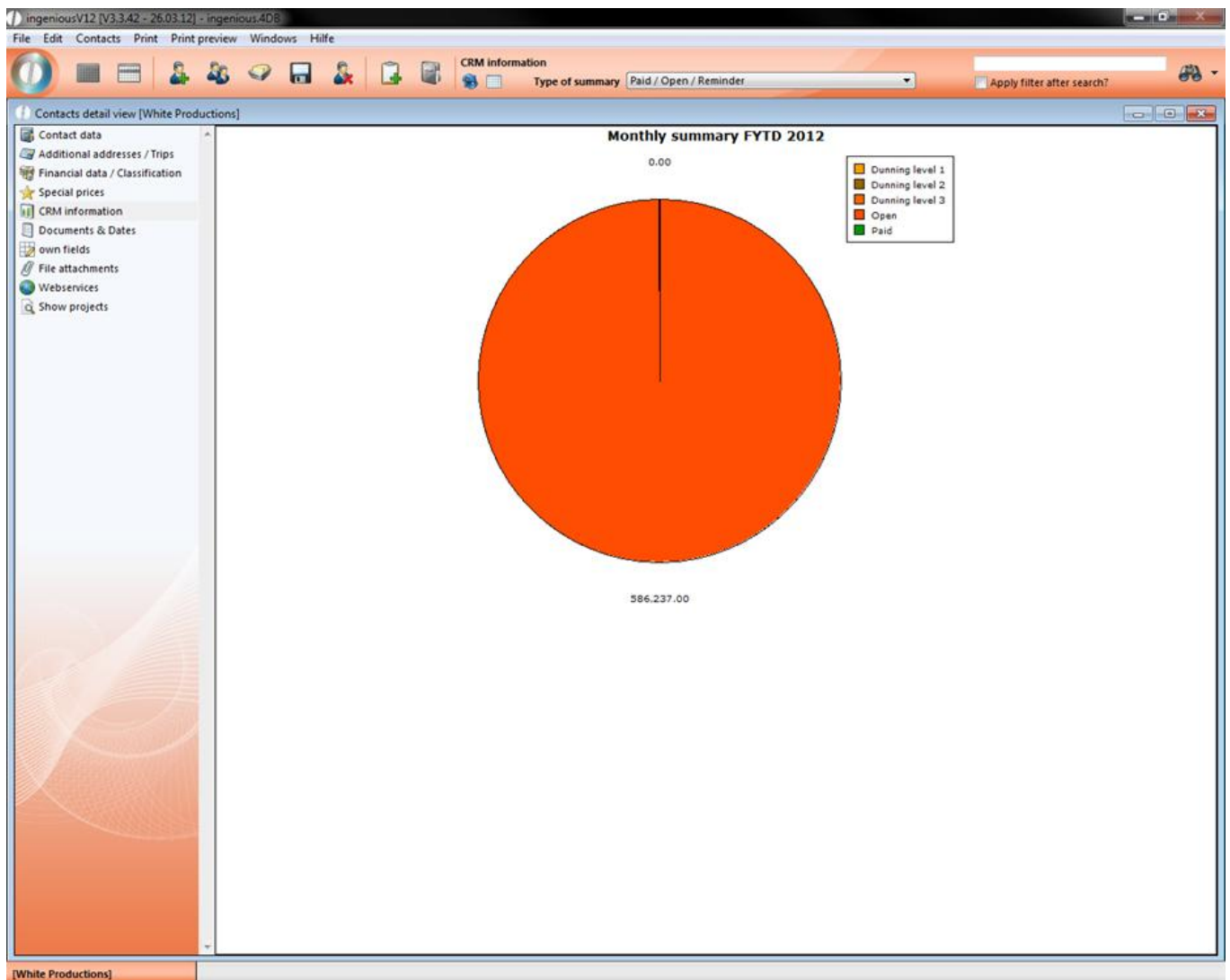
The first graphic evaluation form is a bar diagram for the display of sales and profit margin. For a larger overview, the bars are differentiated by colors. Invoices are yellow, the net sales are red and the absolute profit margin is displayed in green. The X-axis shows you the fiscal year and the Y-axis shows you the amount.



The next diagram displays the quotations, contracts and invoices in a three-dimensional format. For a better overview, the bars are represented in different colors.

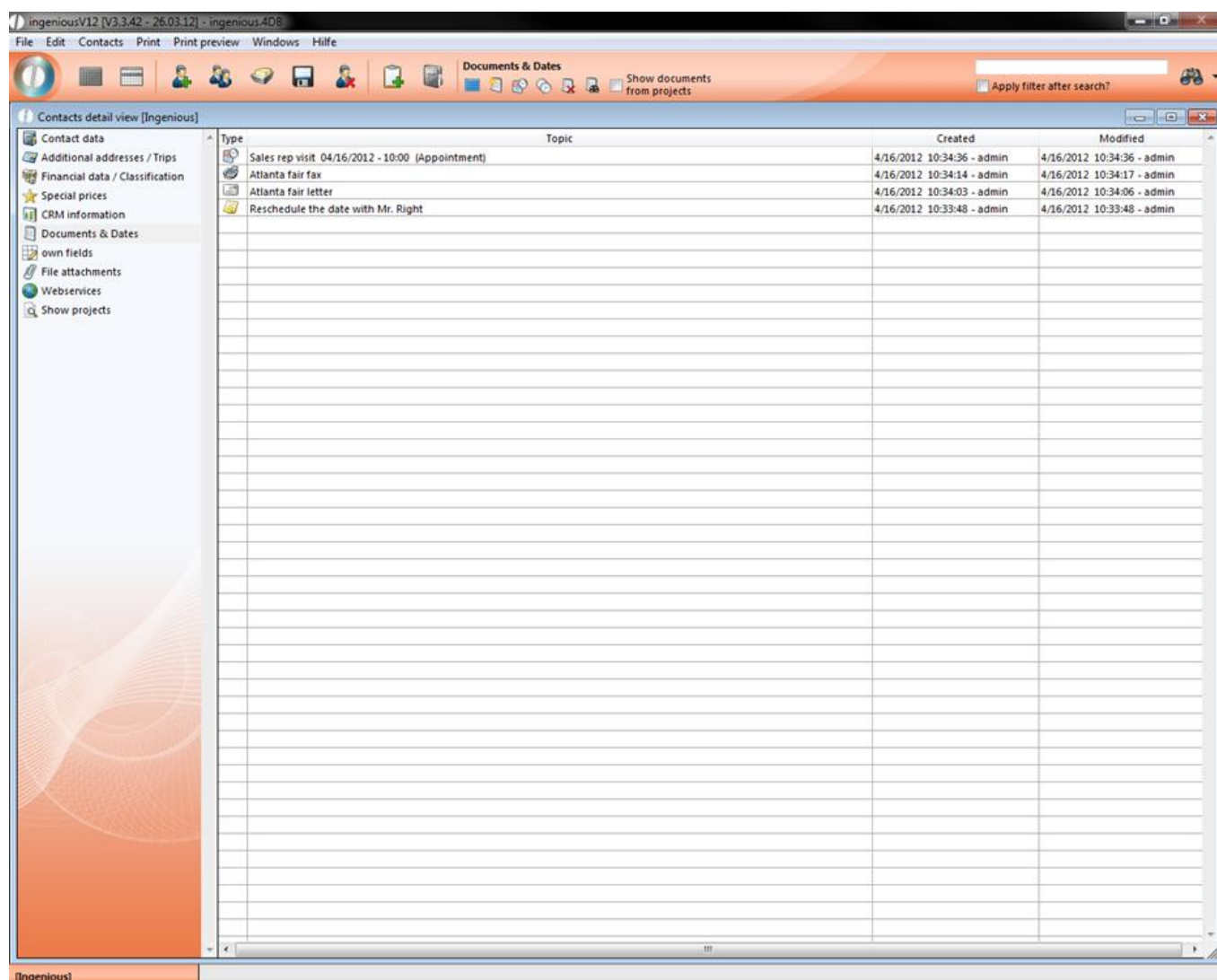





The third graphic representation shows a circle diagram in which different levels of the debt collection or invoice status of a customer is indicated in color.




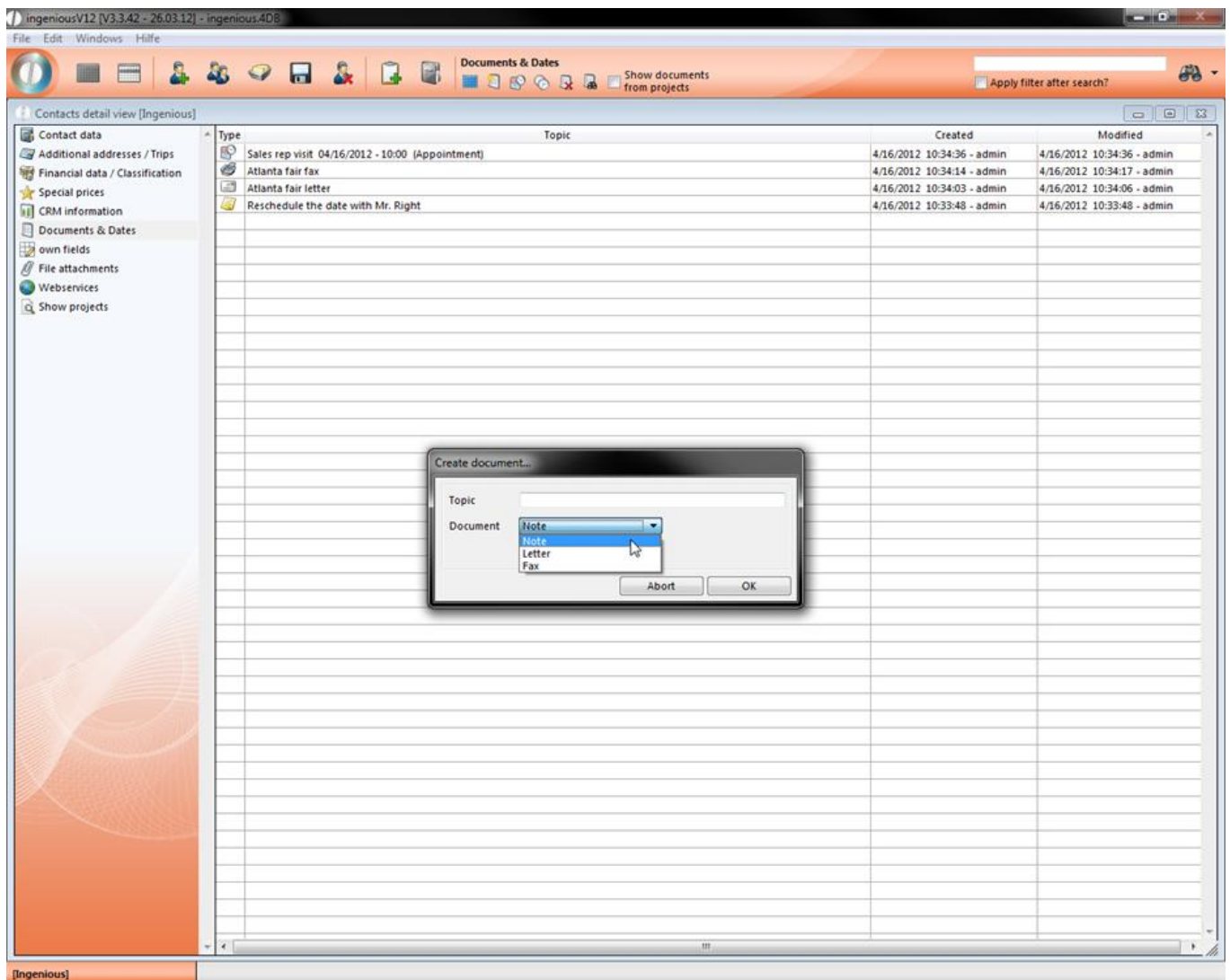
3.1.2.6 Documents and dates

In the column "Documents & Dates", you can create and save different documents yourself. This has the advantage that you can directly tie the necessary documents to your contact, and thus obtain an overview of all communication with the customer.

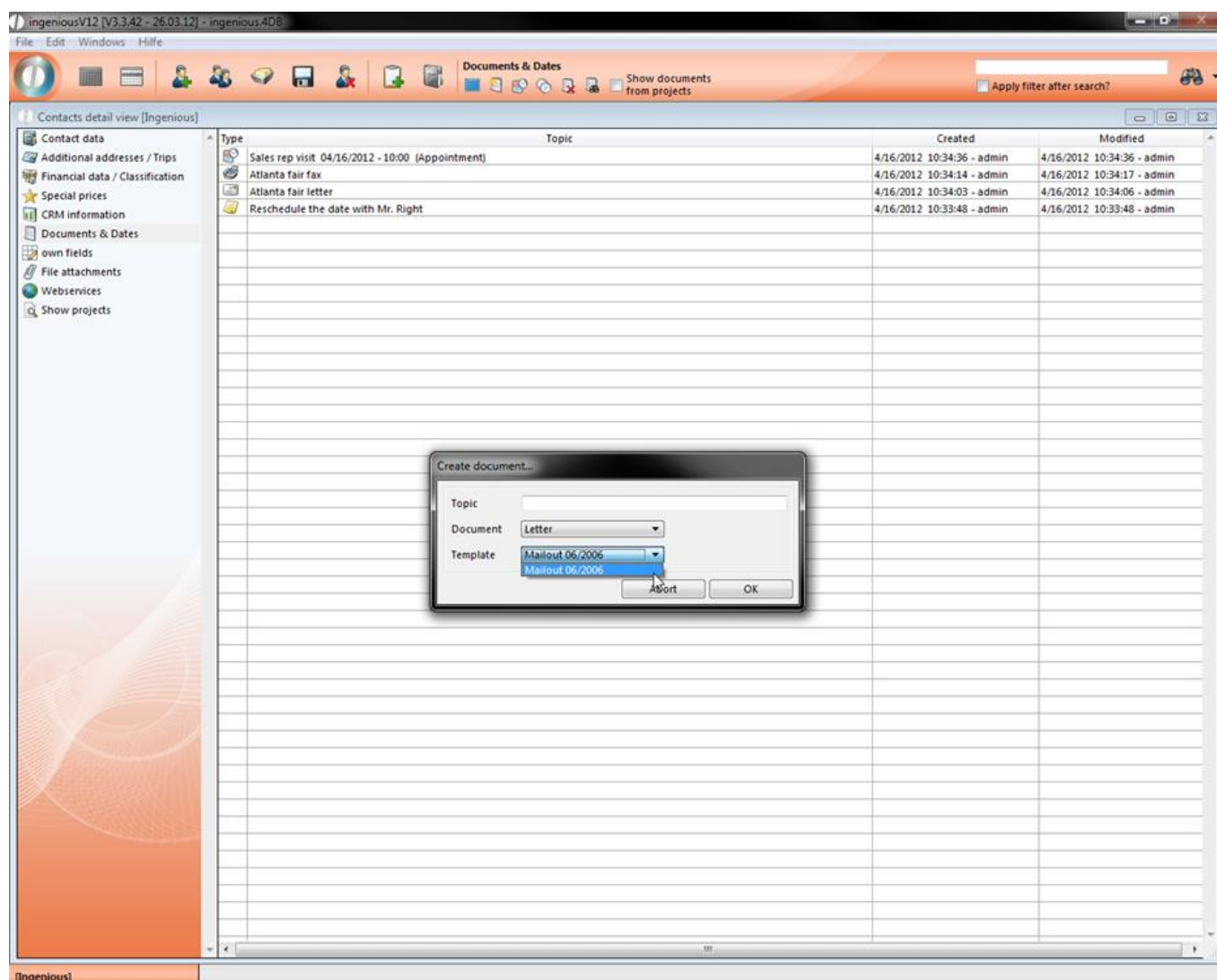


-  Notes
-  Letter
-  Fax

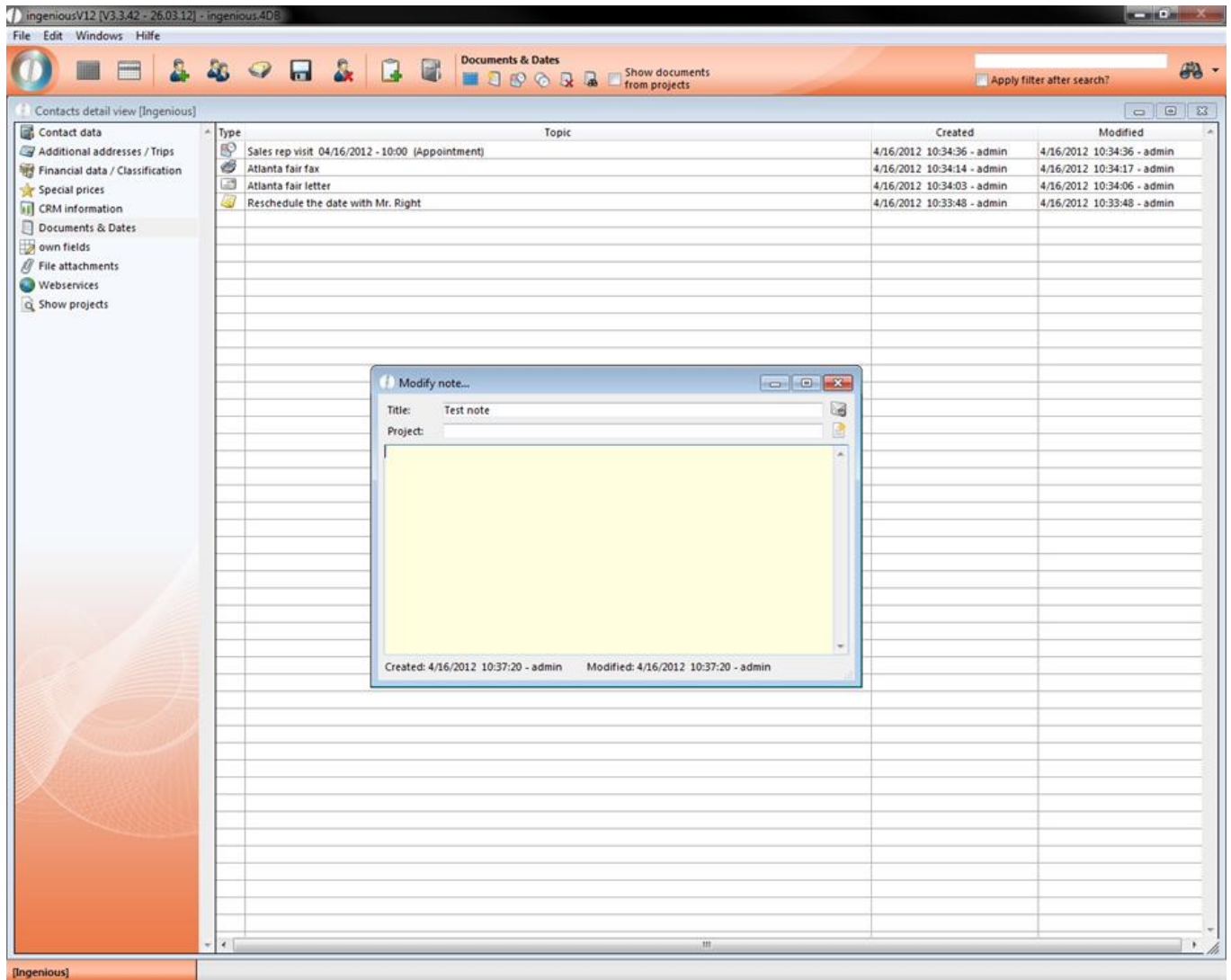
In order to create a note or a document, please click on the  icon "Insert Document". A dialog window will open in which you can designate the desired document structure.




If you want to provide a letter or a fax, the field "Template", from which you can select different prewritten letters or fax templates, is available to you. You will find these templates in the menu "Data/Template administration". You can create your own templates there that are then also cited in the "Templates" field.




Depending on the selected document option, a note Modification window or a text-Modification window opens in which you can create your desired document.

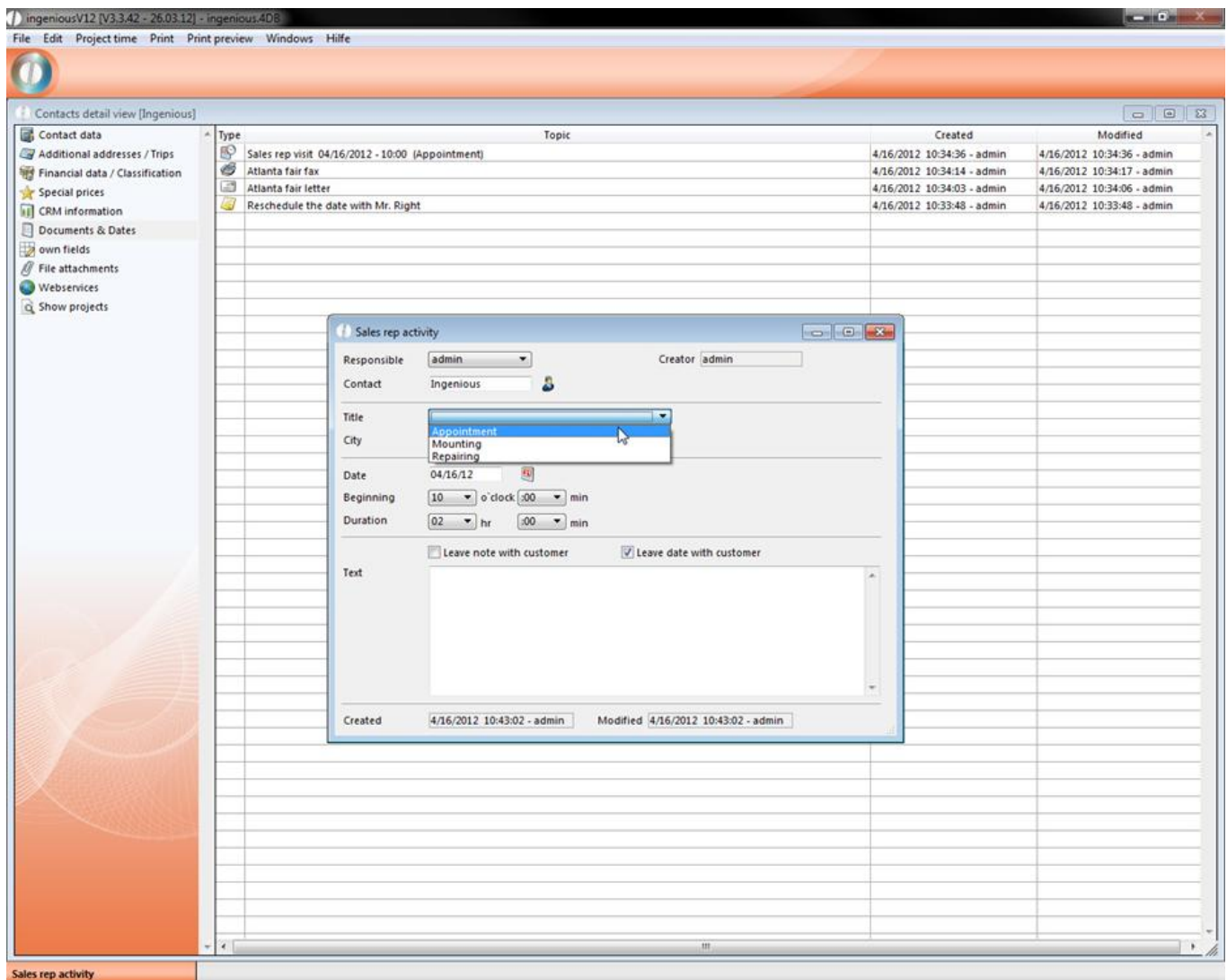


Note management window


When closing the document, you select the option "Accept" in the window that appears. Your new document is now indicated in the view and can be revised (open by double-clicking) or deleted by you at anytime (Mark object and click on ).

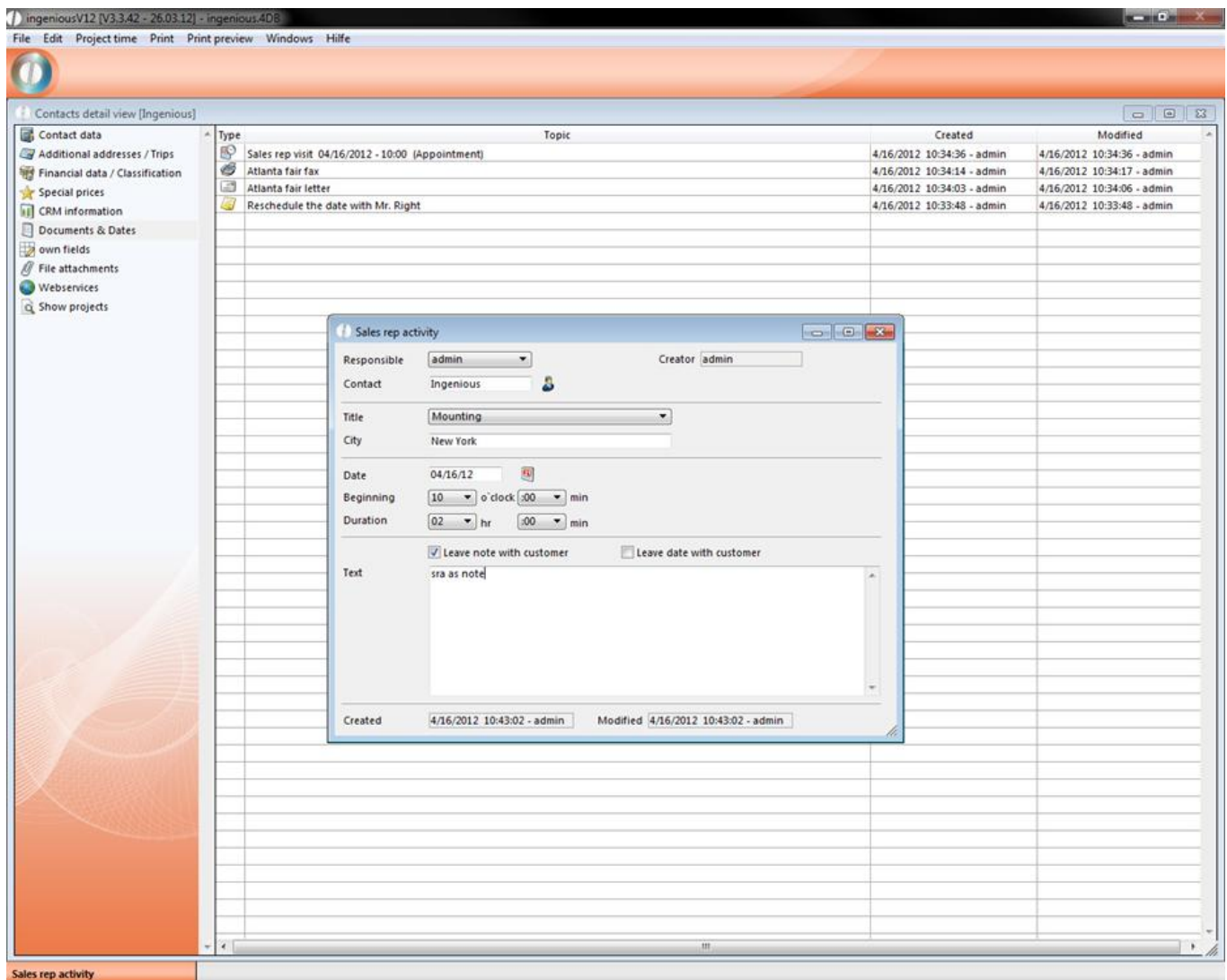
Field activities


With the  button, field service dates can be directly made and managed in the contact. This saves time for the user and provides a better overview. The window "Field Activity" opens where the responsible editor can specify the time and duration of the activity. In the "Title" field, different options (installation, repair, presentation and discussion) are provided in order to assign the field service activity.

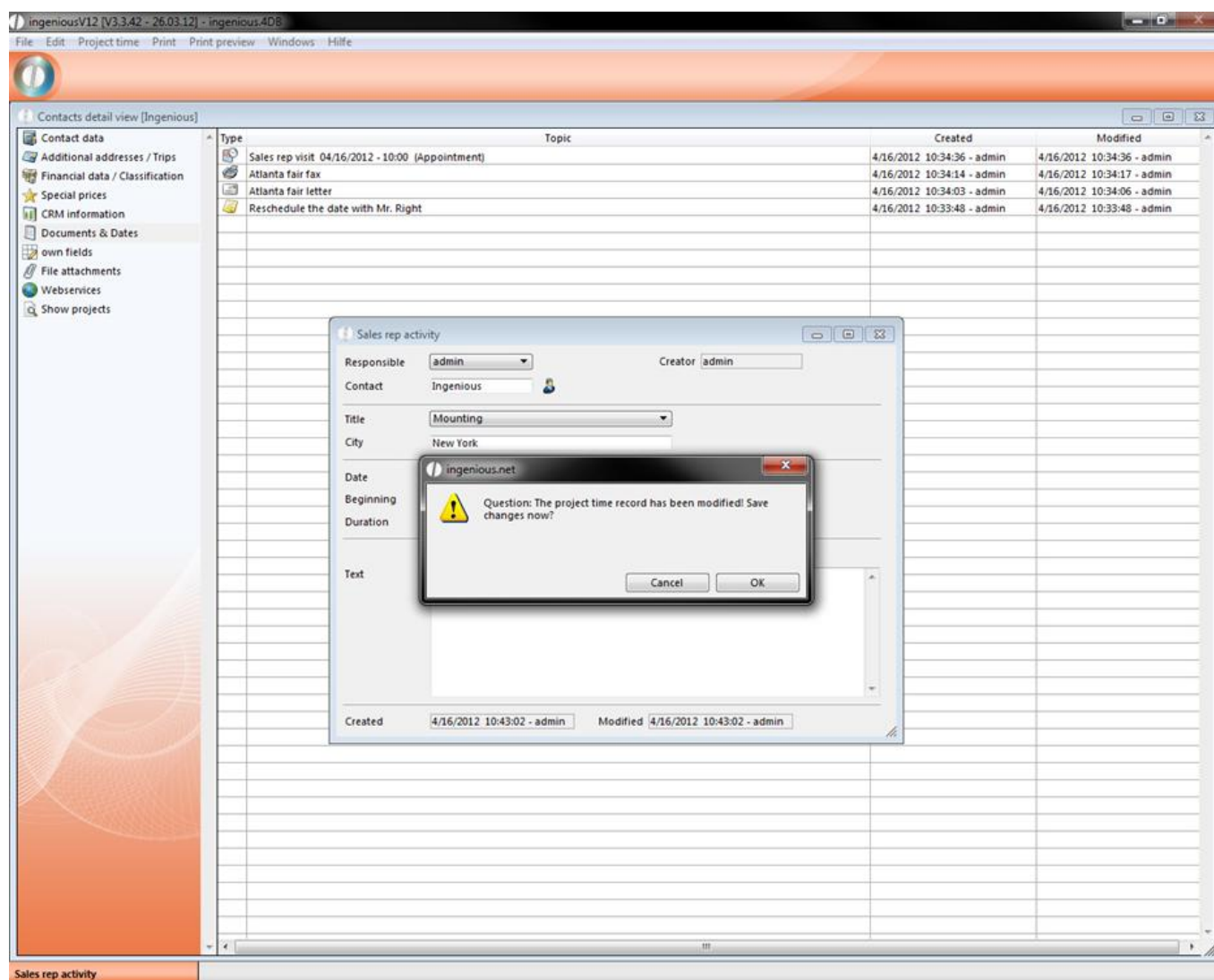


Practice "Planning field service activities"

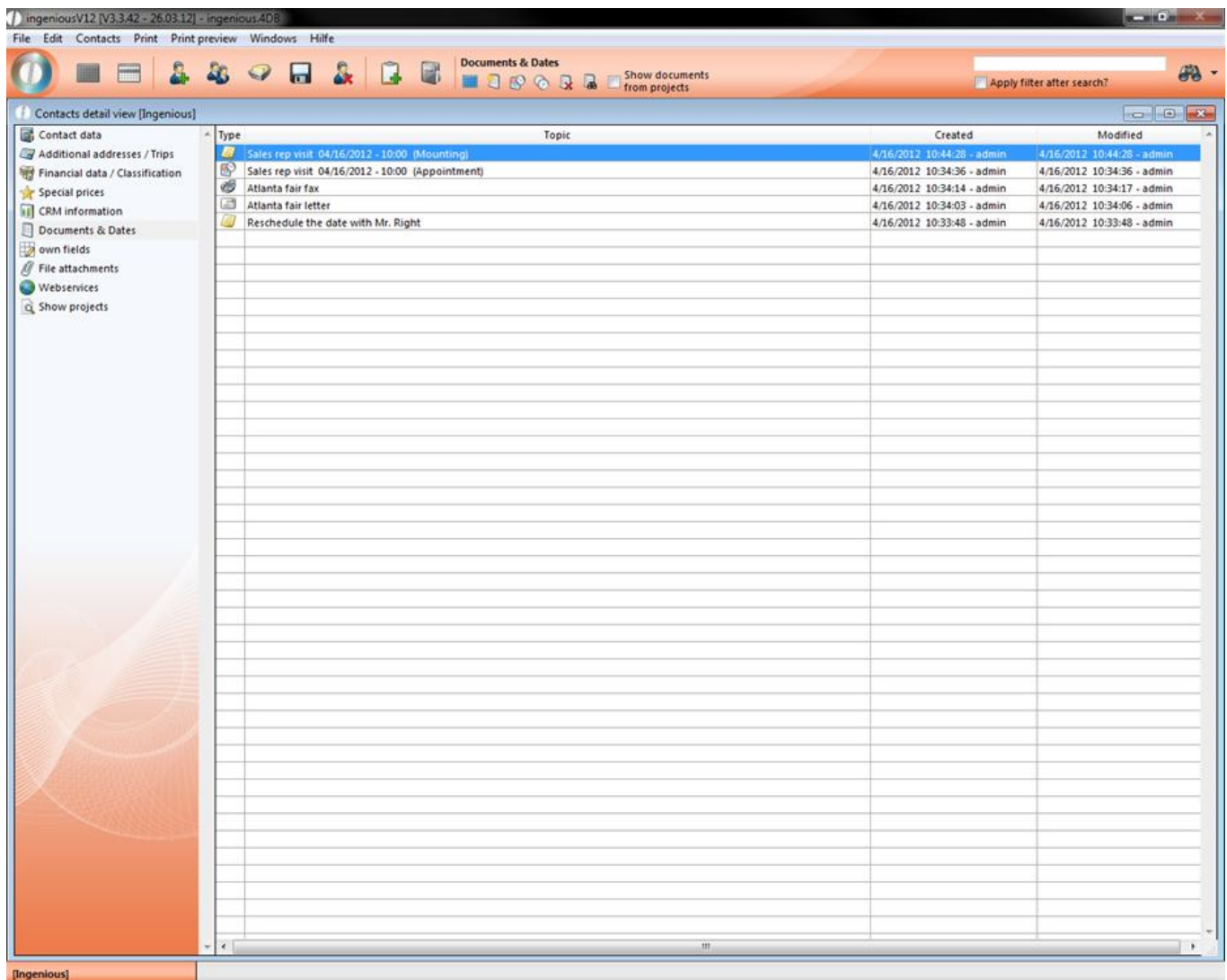
1. With the  icon, you can create a field service activity for the contact "Olsen" and you can fill in the fields in as shown in the following image.



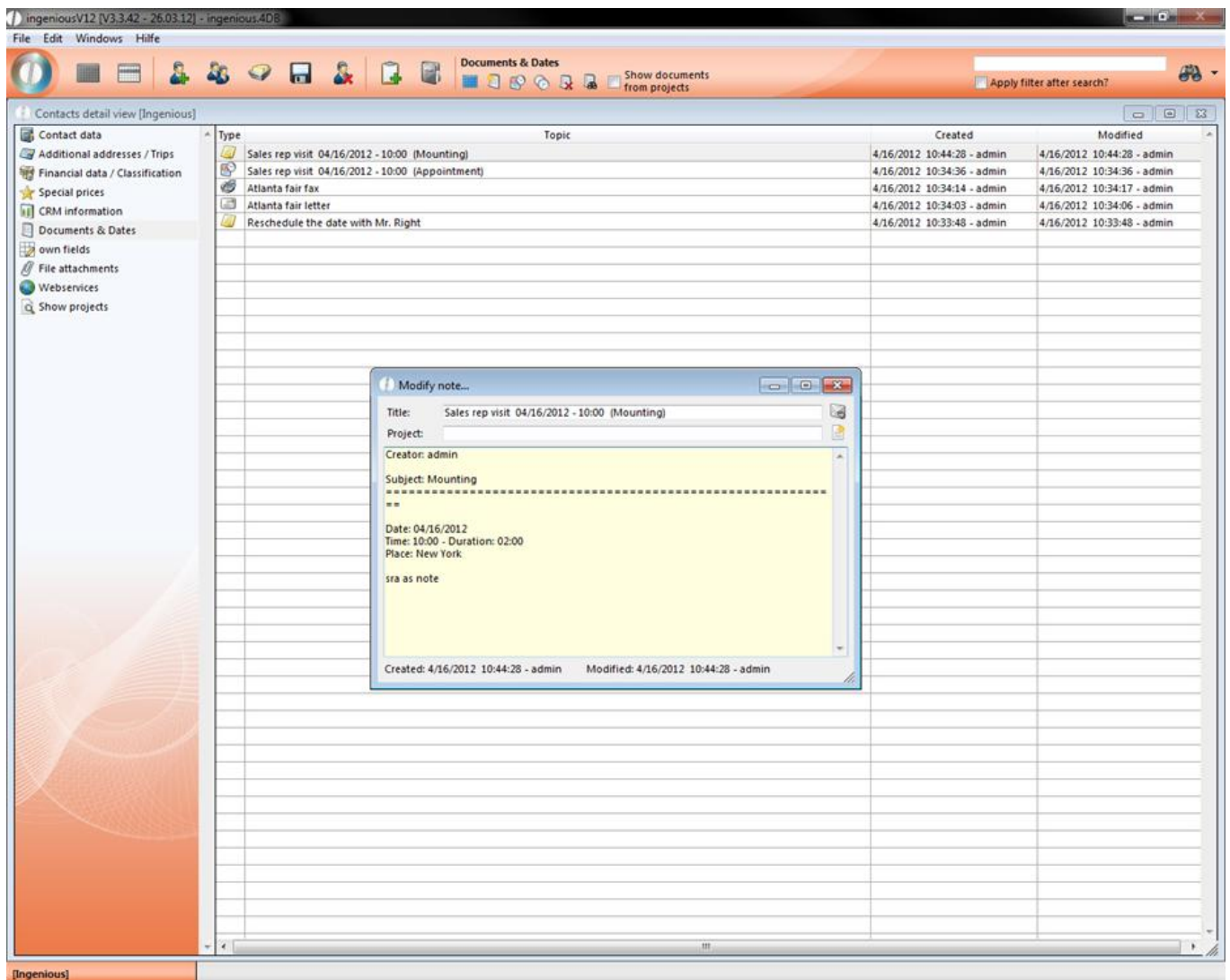
2. Please enter a checkmark in the field "As a note when archiving the contact". Now the data of the AD dates are stored as a note and further revisions of the data in the contact view are not possible. Close the entry with the  icon, and click in the window that appears on "OK". Please add a checkmark.



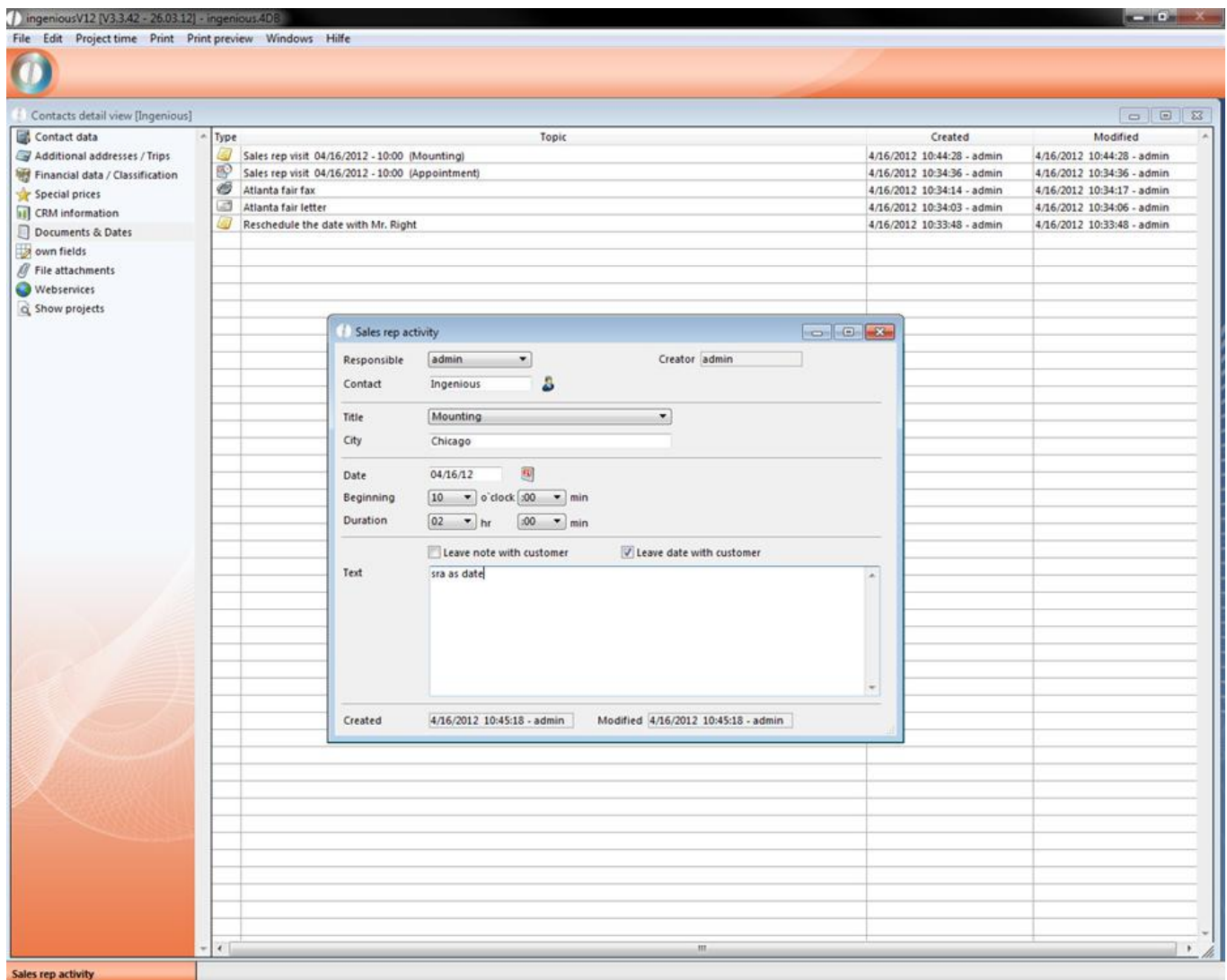
In the contact detail view the field service activity is indicated as a note.



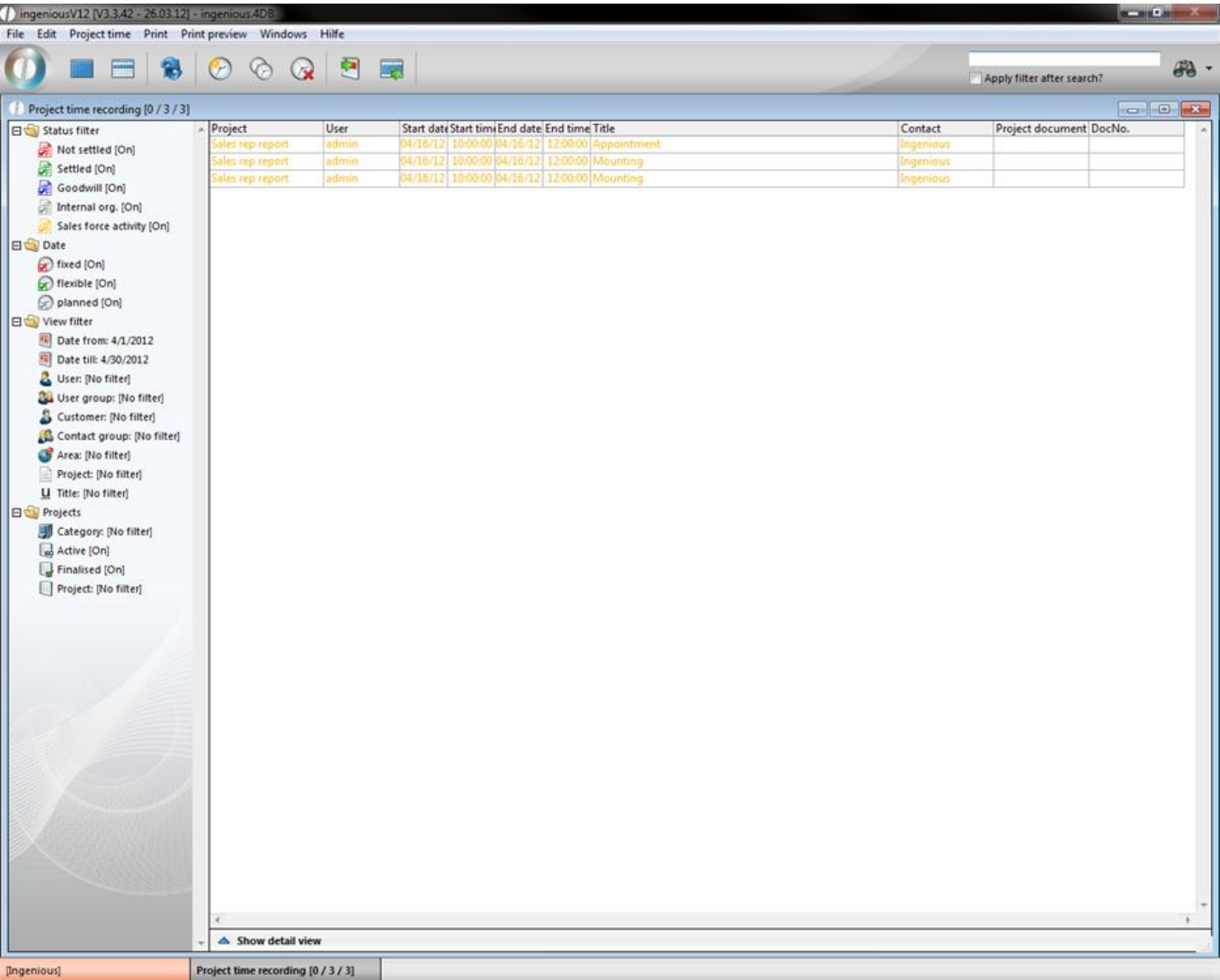
3. If you open the date by double-clicking, a note window will open and cannot be further revised.



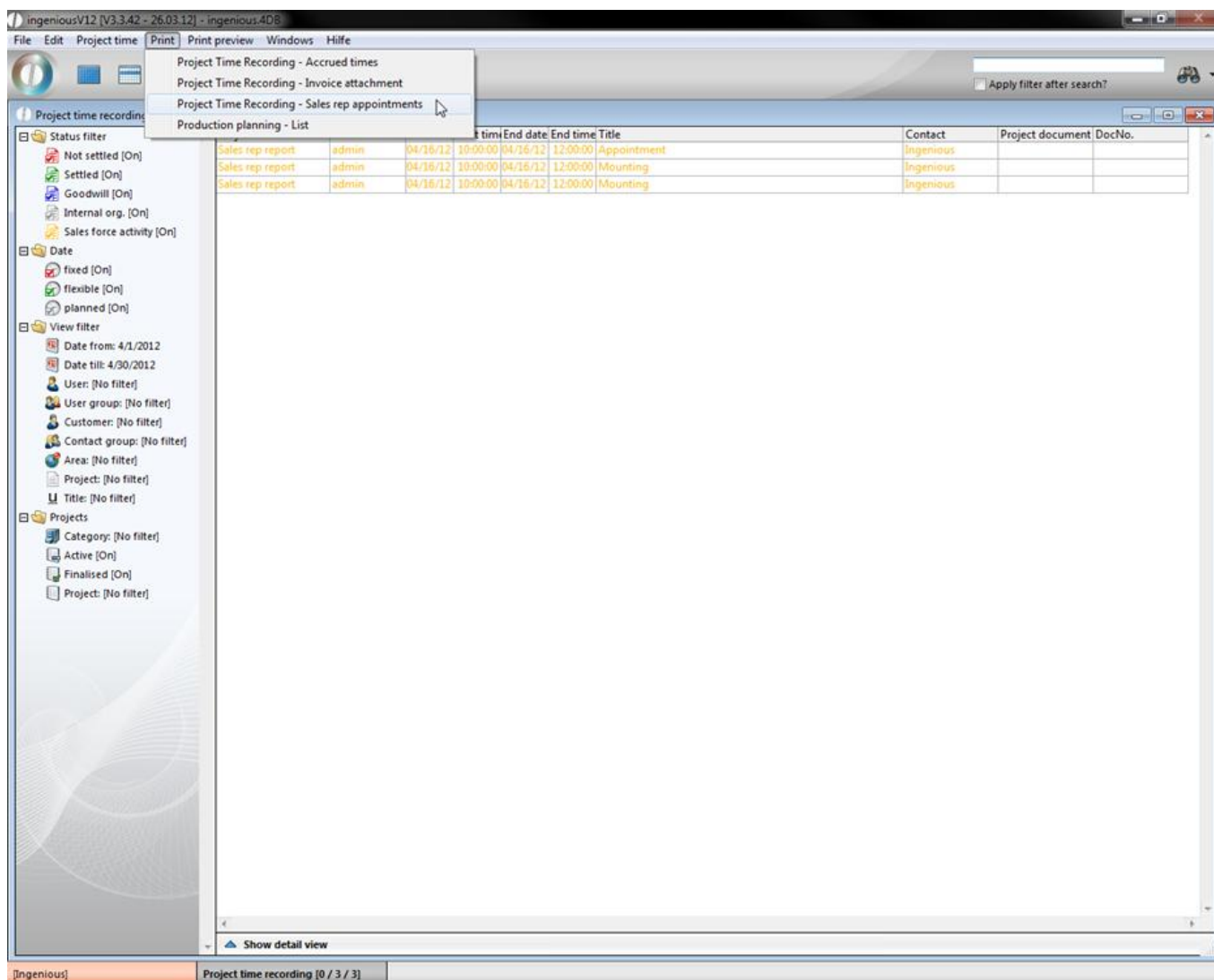
4. Create a new AD date. This time the checkmark will be placed in the field, "Leave date with contact".



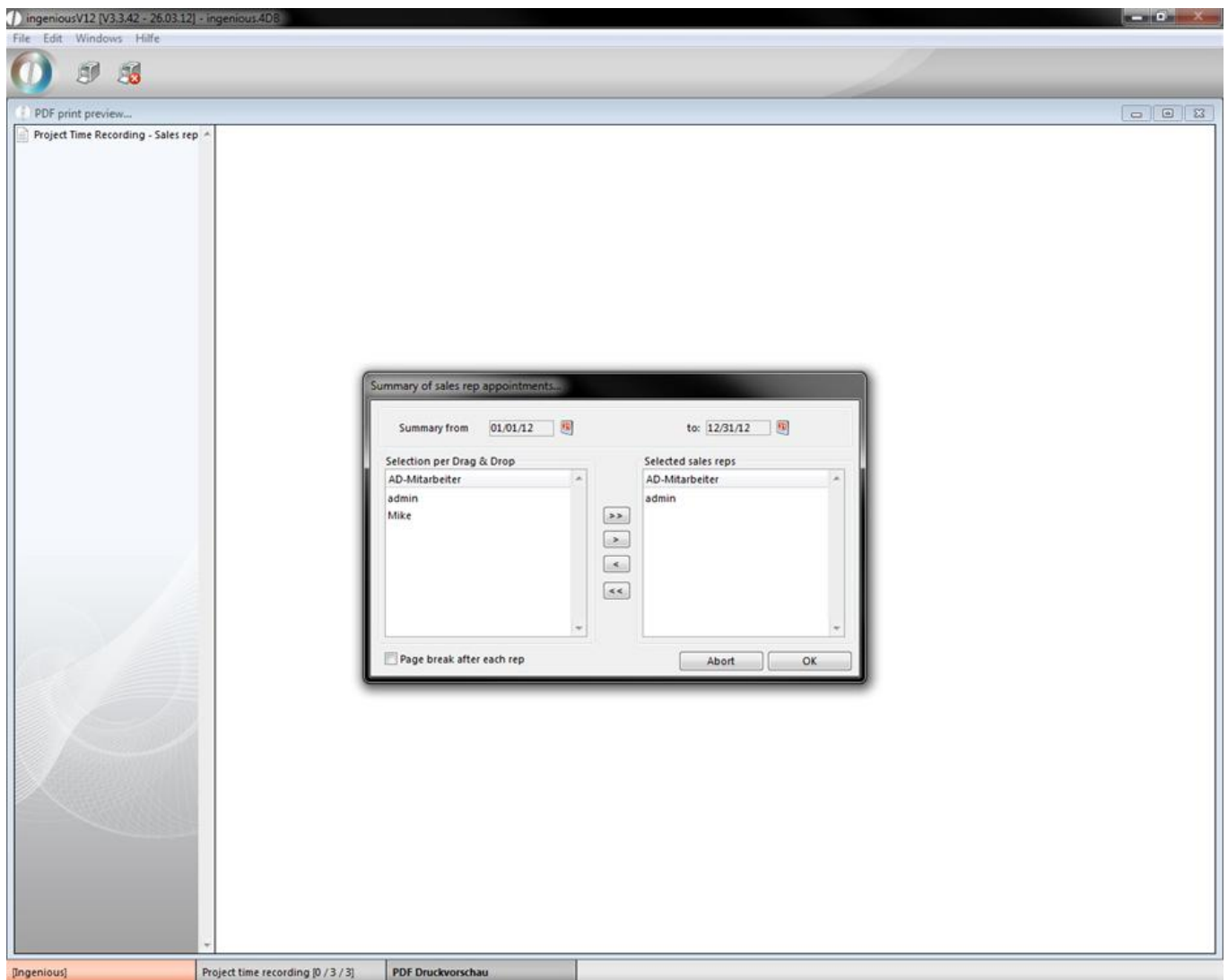
5. In the contact detail view, this date will be indicated with a field service icon 🕒 and can be opened and revised at any time.



Printing of field service activities

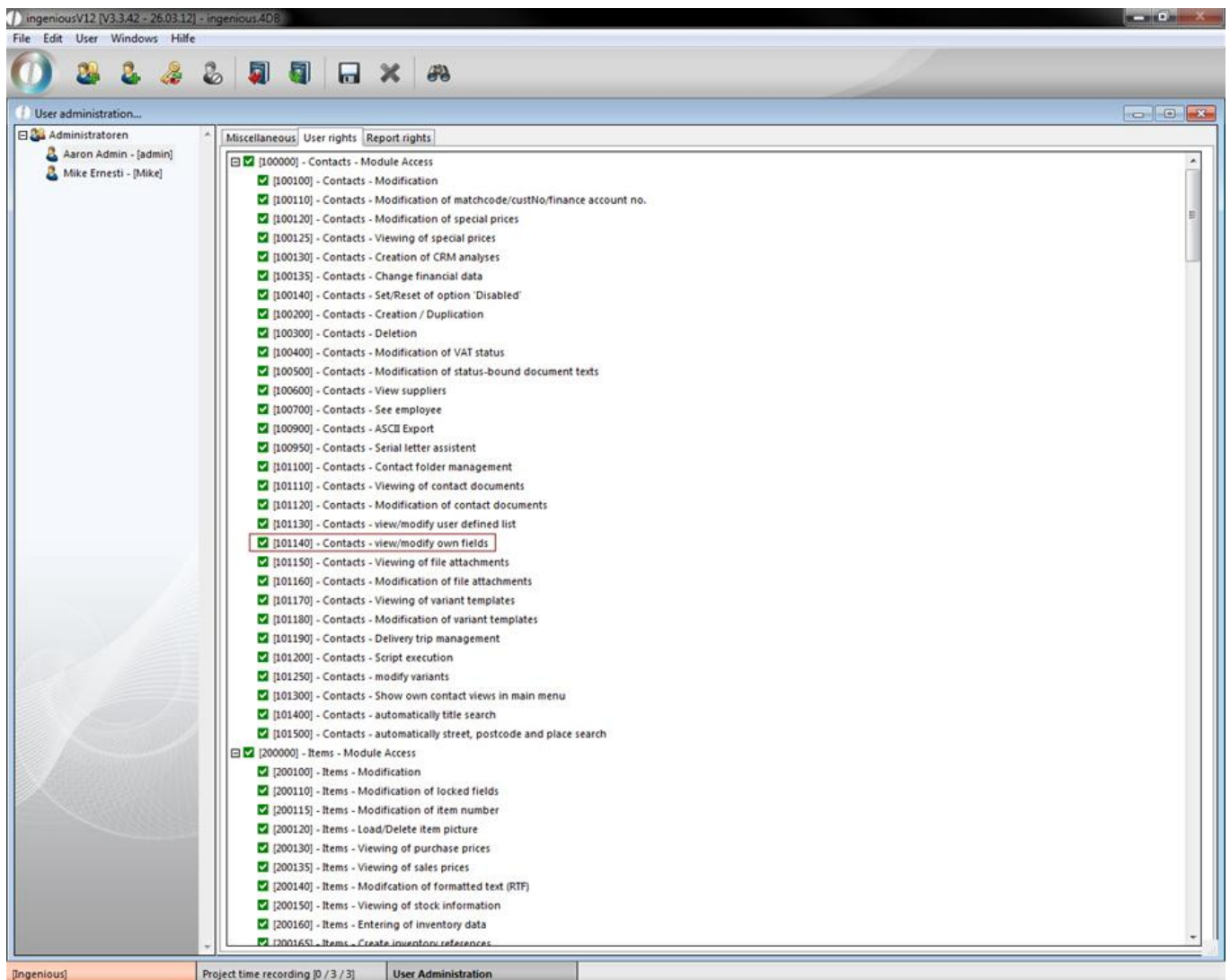


In the project time recording, field service dates for every employee can be printed out using the main menu, "Print" or using the option "Project time recording". The date of the analysis period can be specified, and the selected employees for whom the field service dates are to be printed, can be pulled with the Drag & Drop function into the right field.



3.1.2.7 Own contacts fields

The detail area "Own fields" gives you the possibility to add individual comments to a contact. In order to use this area, one has to unlock the user rights and sign on.



You can also use different text fields and diverse data fields, checkboxes and date information for individual entries.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Contacts Print Print preview Windows Hilfe

Contacts detail view [Ingenious]

own fields

texts

individual_text_1 Storm

individual_text_2

individual_text_3

individual_text_4

individual_text_5

numbers

individual_number_1 0

individual_number_2 0

individual_number_3 0

individual_number_4 0

individual_number_5 0

checkboxes

individual_check_1

individual_check_2

individual_check_3

individual_check_4

individual_check_5

Dates

individual_date_1 00/00/00

individual_date_2 00/00/00

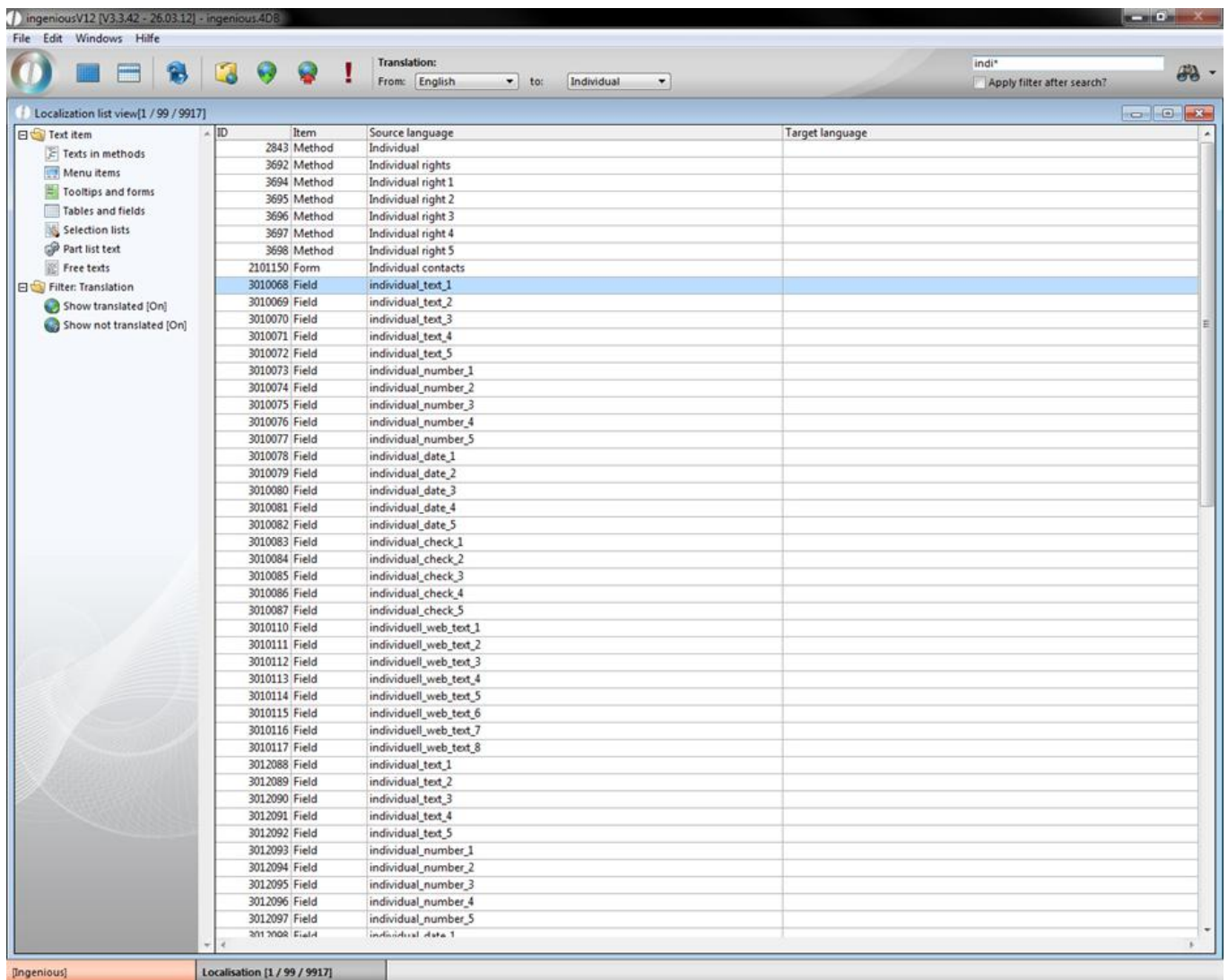
individual_date_3 03/30/12

individual_date_4 00/00/00

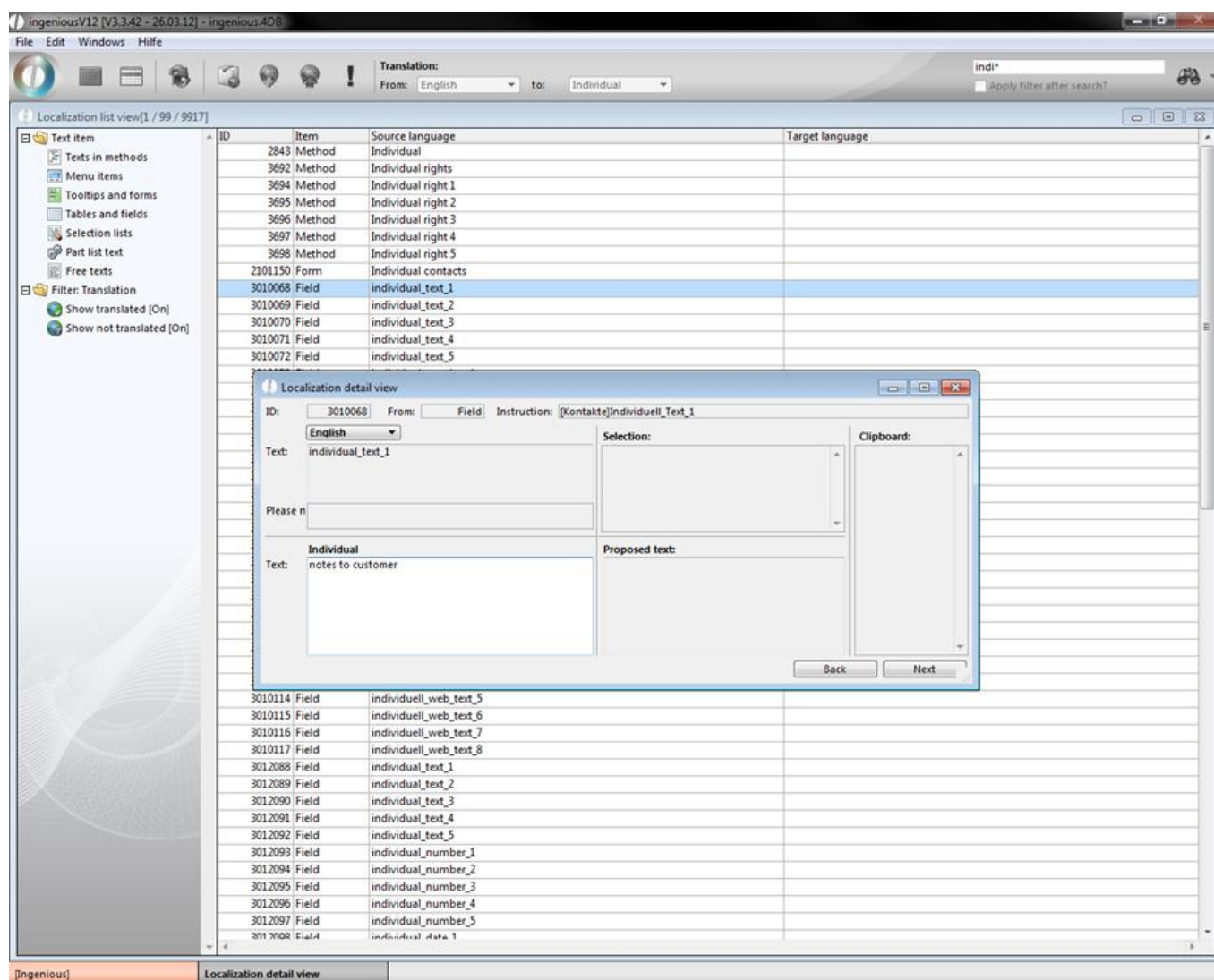
individual_date_5 00/00/00

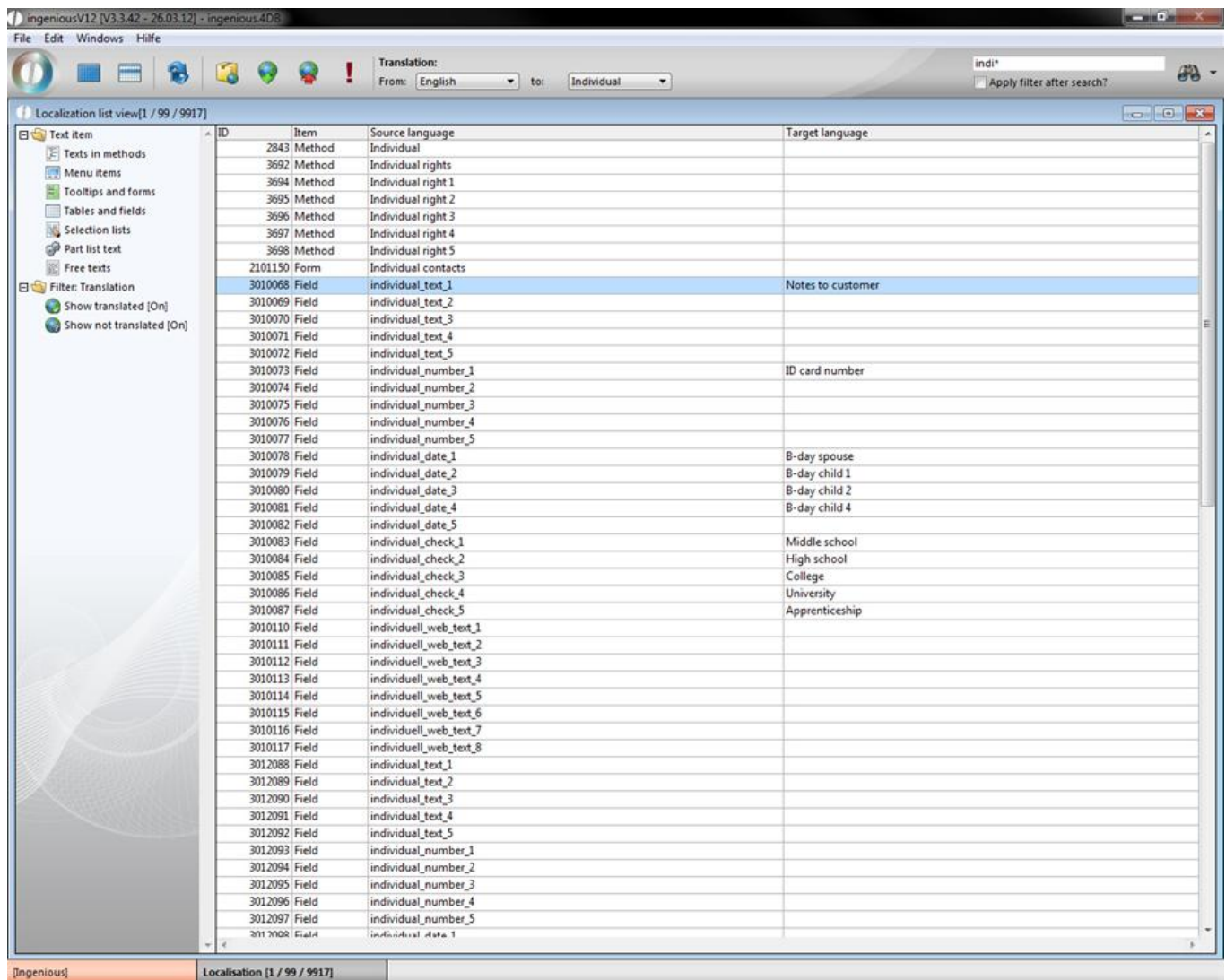
[Ingenious]


With the help of localization, you can rename the Own fields. Select the option "Own" in the field, "Translate according to", and go to the area, "Text item" to "Tables and Fields". To make the search easier, you can enter "indi*" in the quick search.





By double-clicking, you can open the desired text entry and rename it. If you do not want to have a field description, then leave it blank.

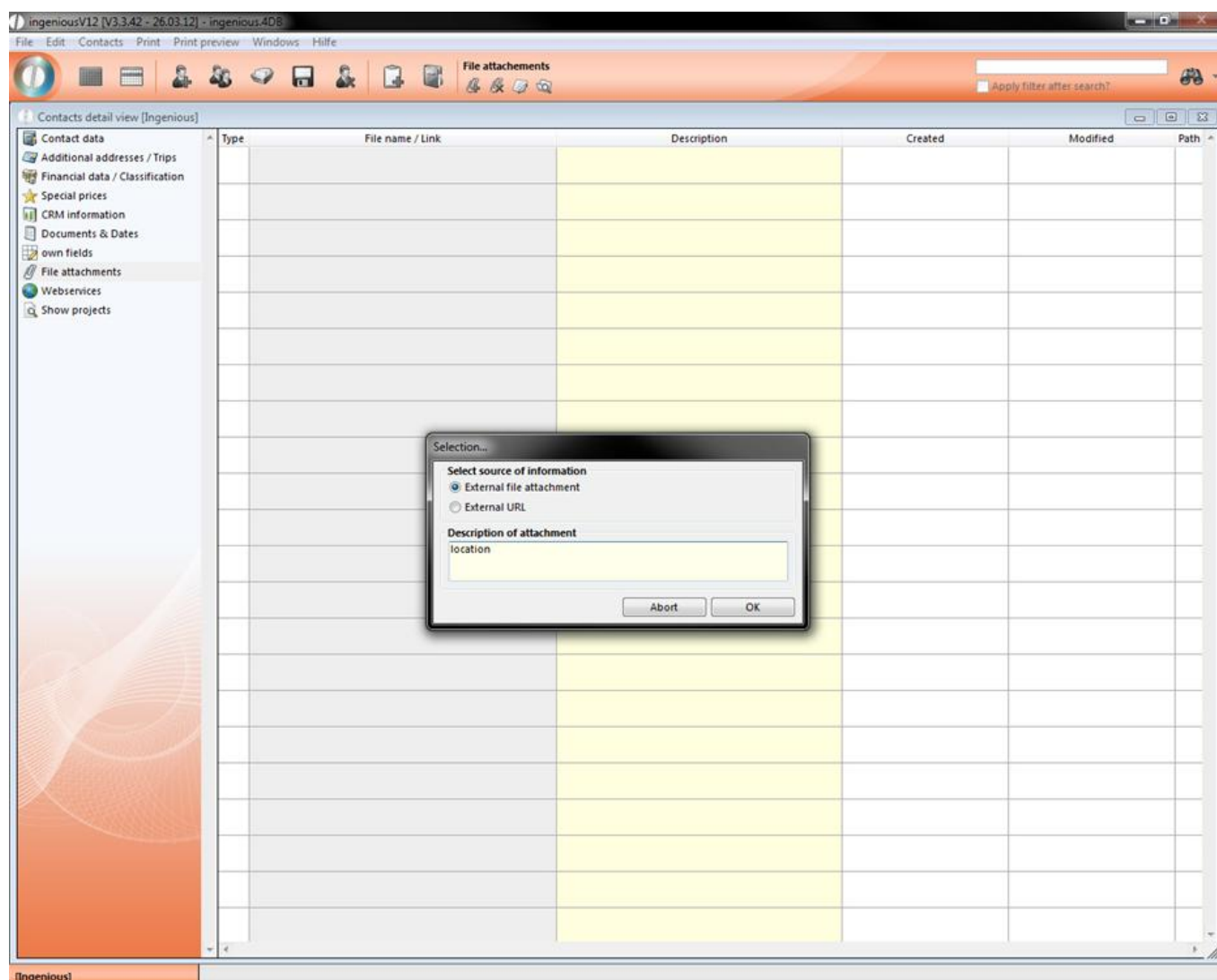




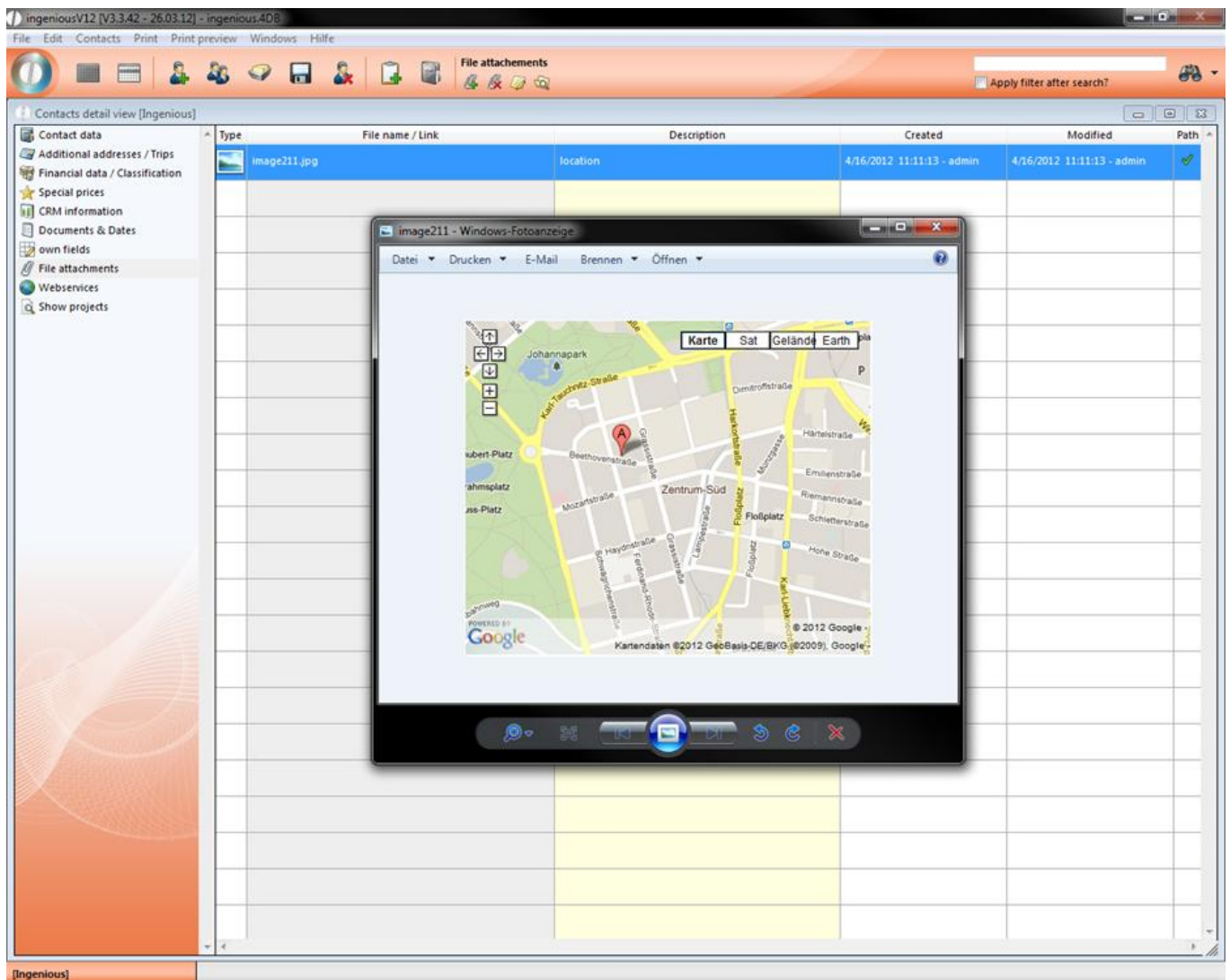
With the  button, you must update the language settings and then you can leave the module. The fields in the contact detail view can look as follows:

3.1.2.8 Contacts file attachments

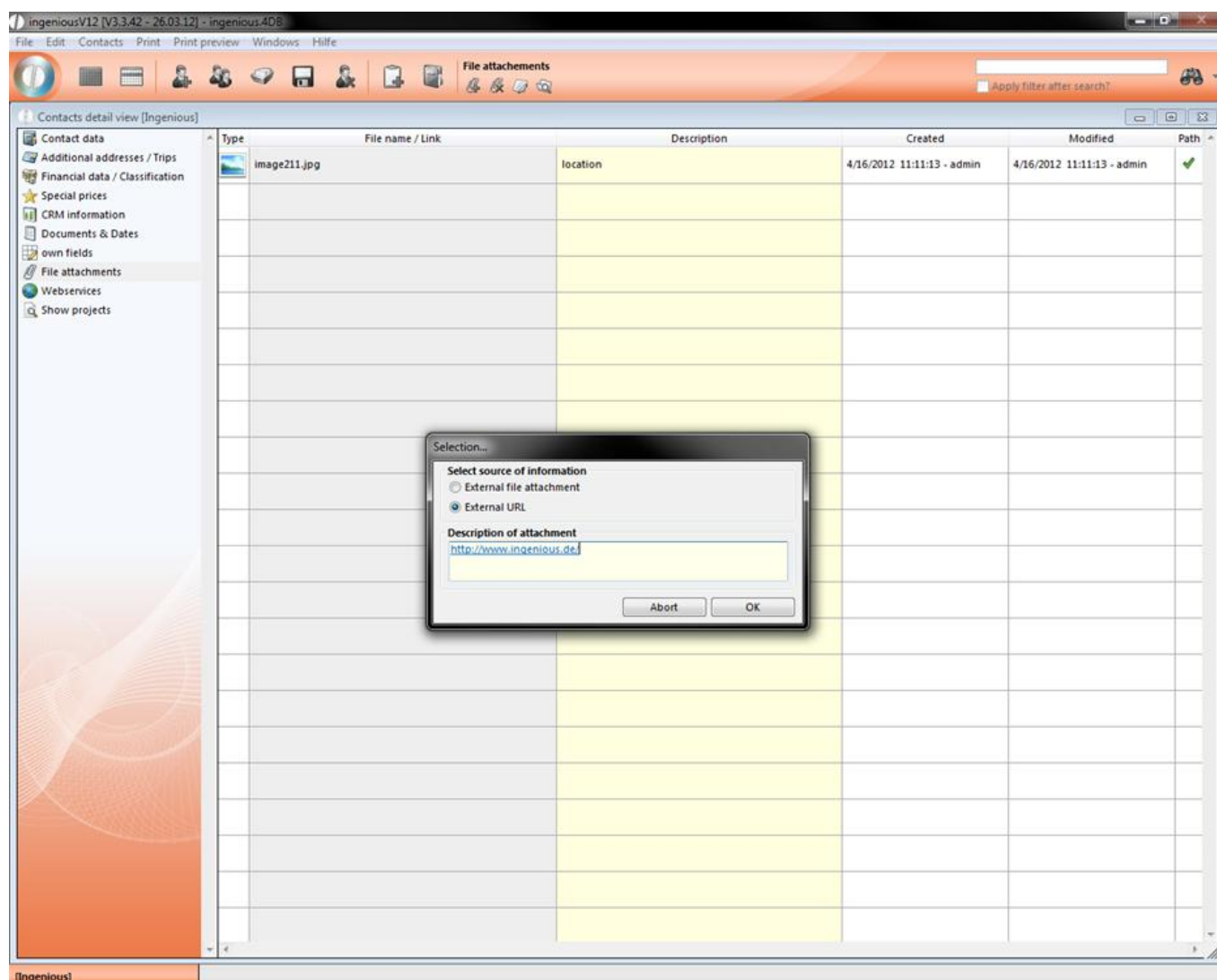
The file creation function is available to you in addition in the entire workflow, in purchasing, in the articles and in the receipt entry. Thus, important external documents can be assigned to individual contacts or projects, centrally managed and saved. You can always find the file creations as an individual column in the detail view of the respective module. The  **File attachments** icon is always the same. After clicking on the icon, an overview with all existing attachments opens. In order to provide a new attachment, click on the icon  "New file creation". A window opens in which you specify if it should be a file creation or an external URL (a website) and then you can enter a description.



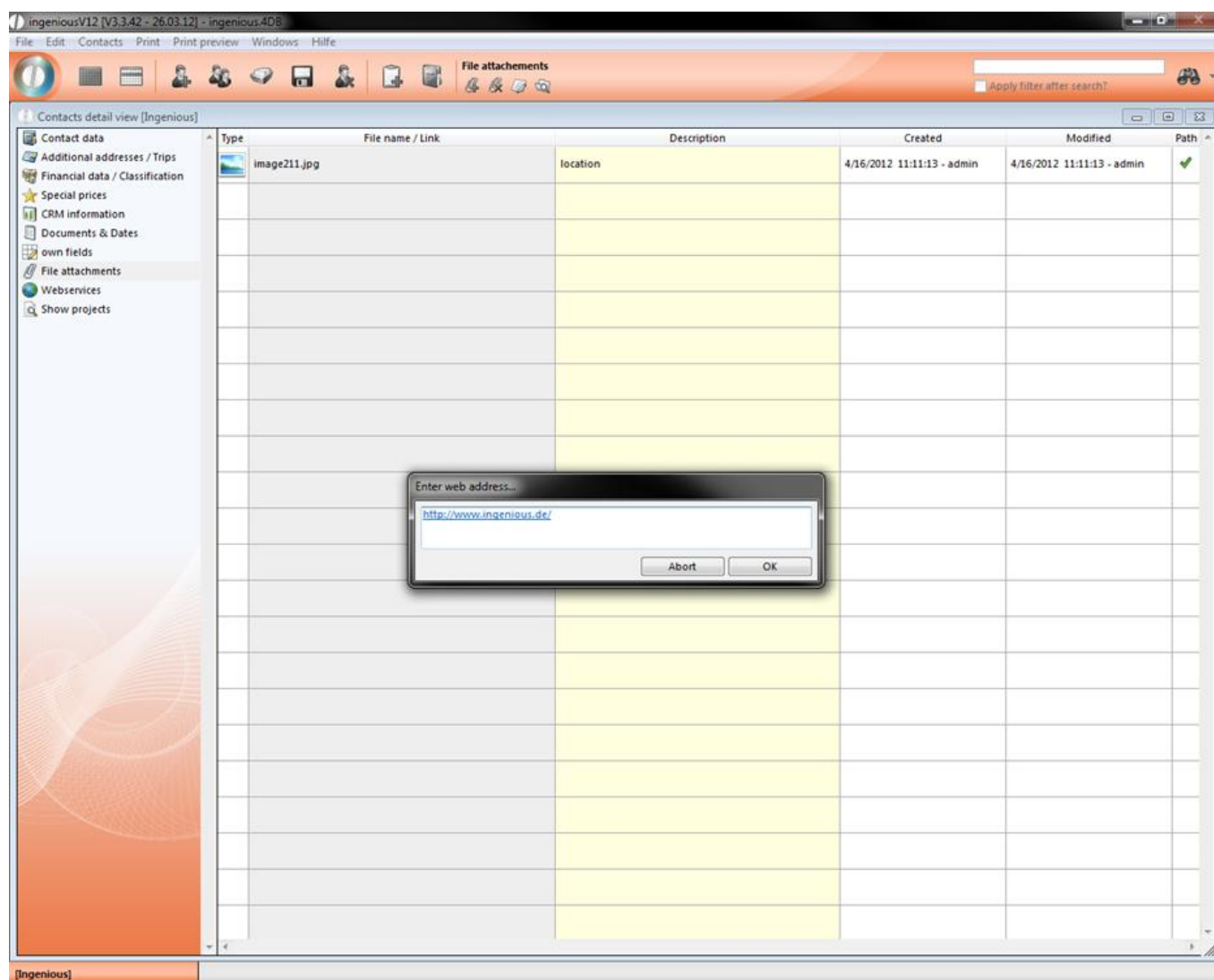
Confirm with "OK". You can indicate the file by double-clicking at any time. The file is then opened in each case in the file-specific standard program. In the example, the jpg file is automatically indicated in the Microsoft Office Picture Manager.



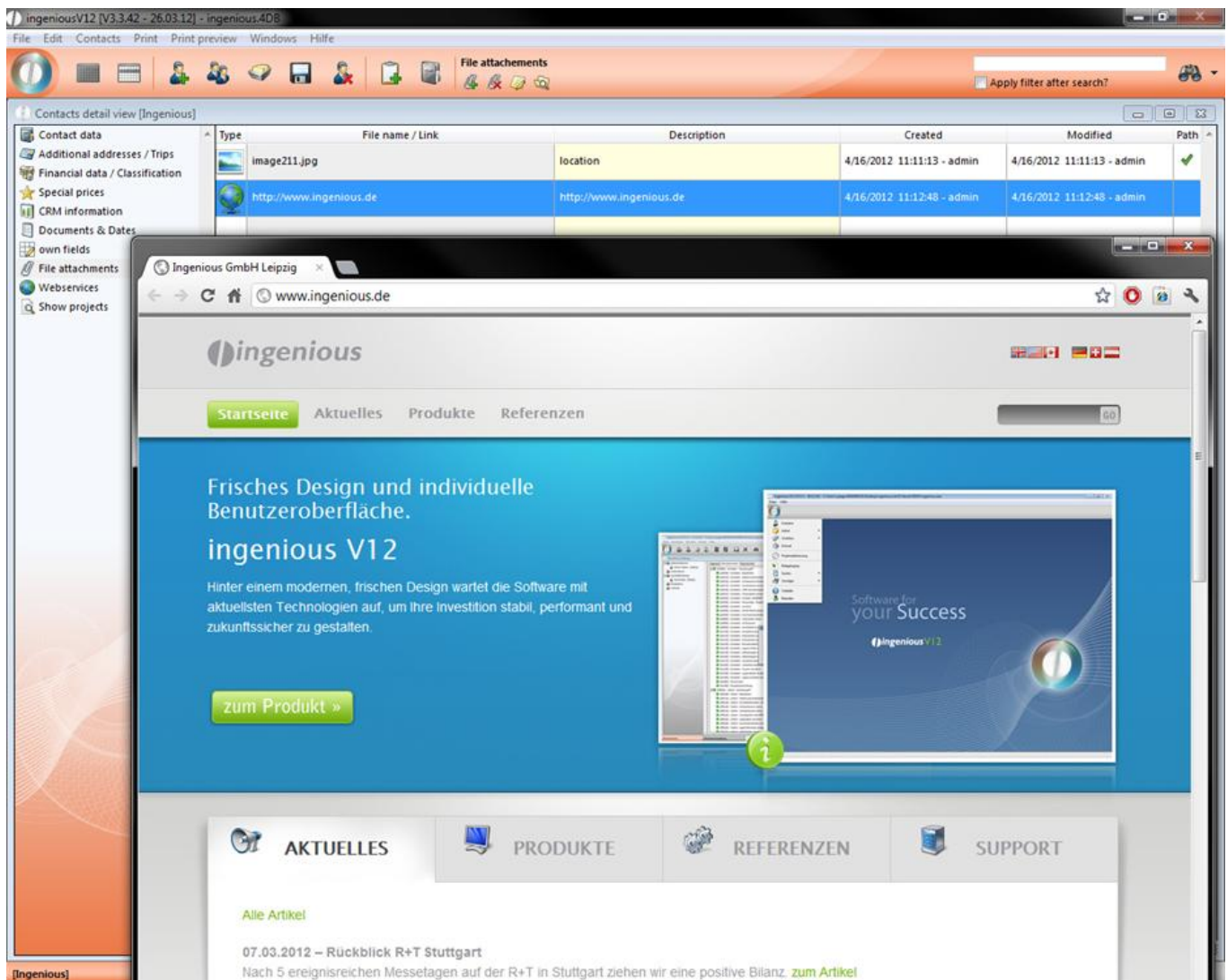
On nearly the same way you can add an external URL. In the next step put in the web address in the window and confirm it with "OK".



Add external URL

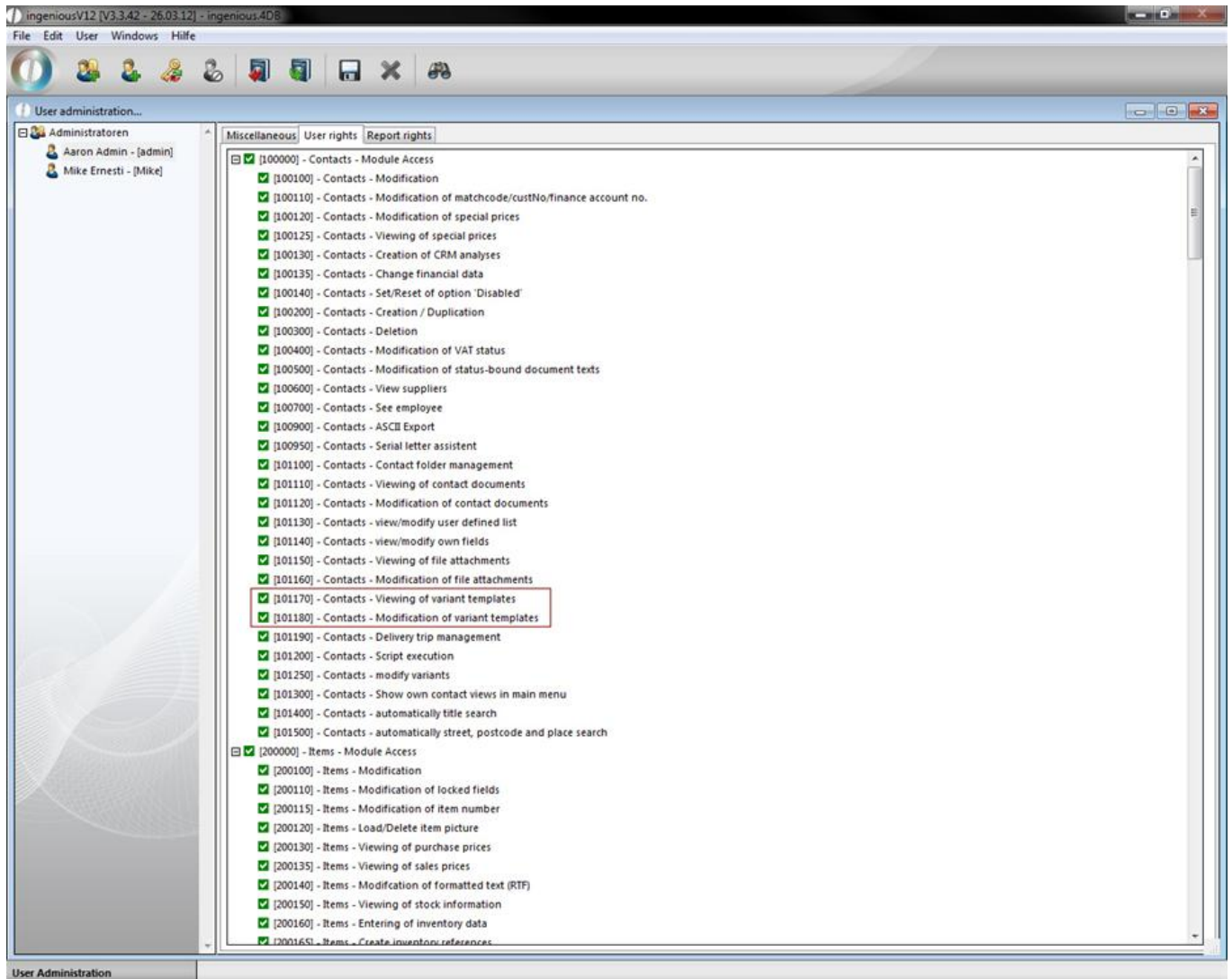


Put in the web address

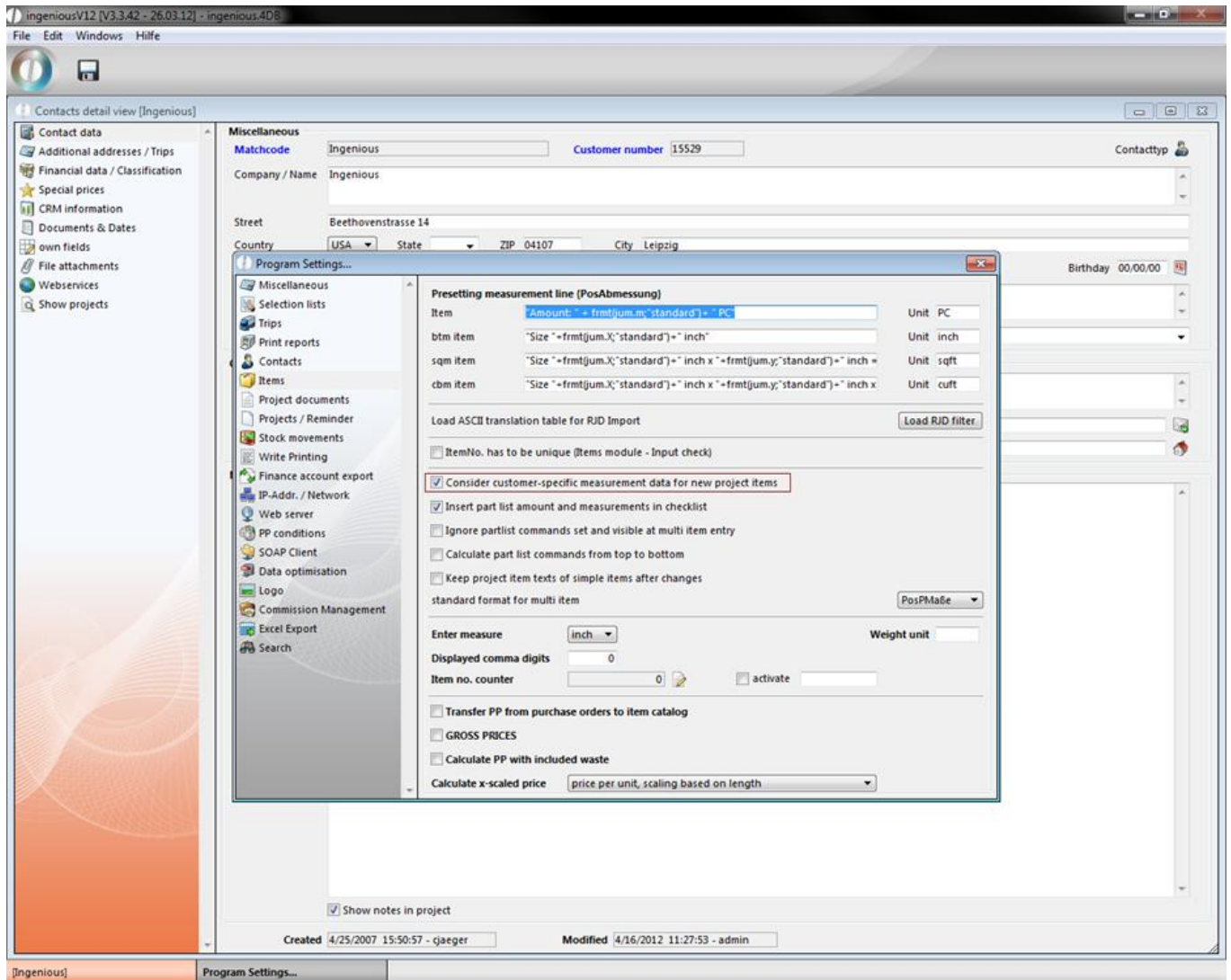



3.1.2.9 Variant templates

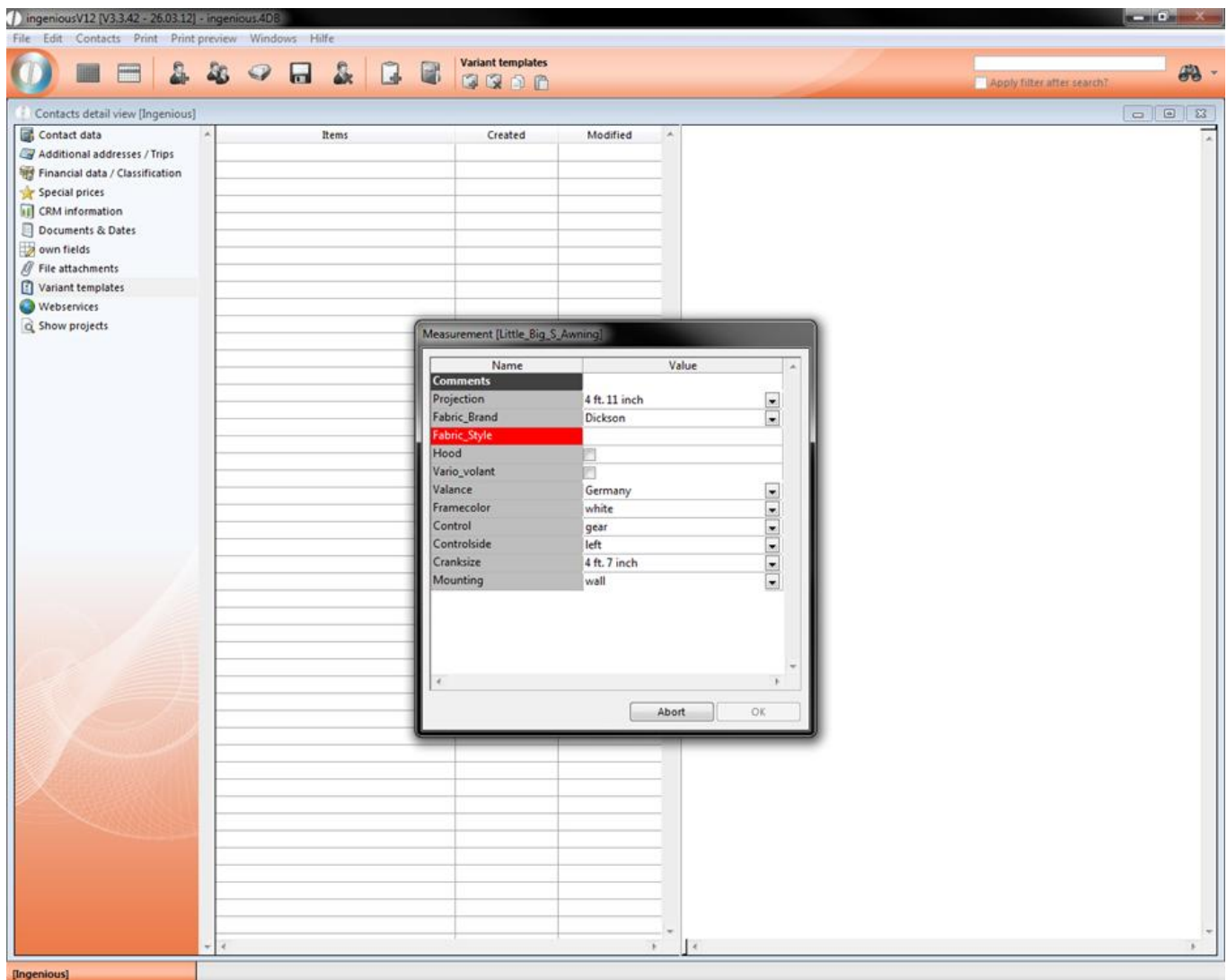
In the variant templates column, it is possible to save contact-specific measurement files of an article as a template (Master/Default) under one contact. Next the corresponding user rights must be approved by the user administration.



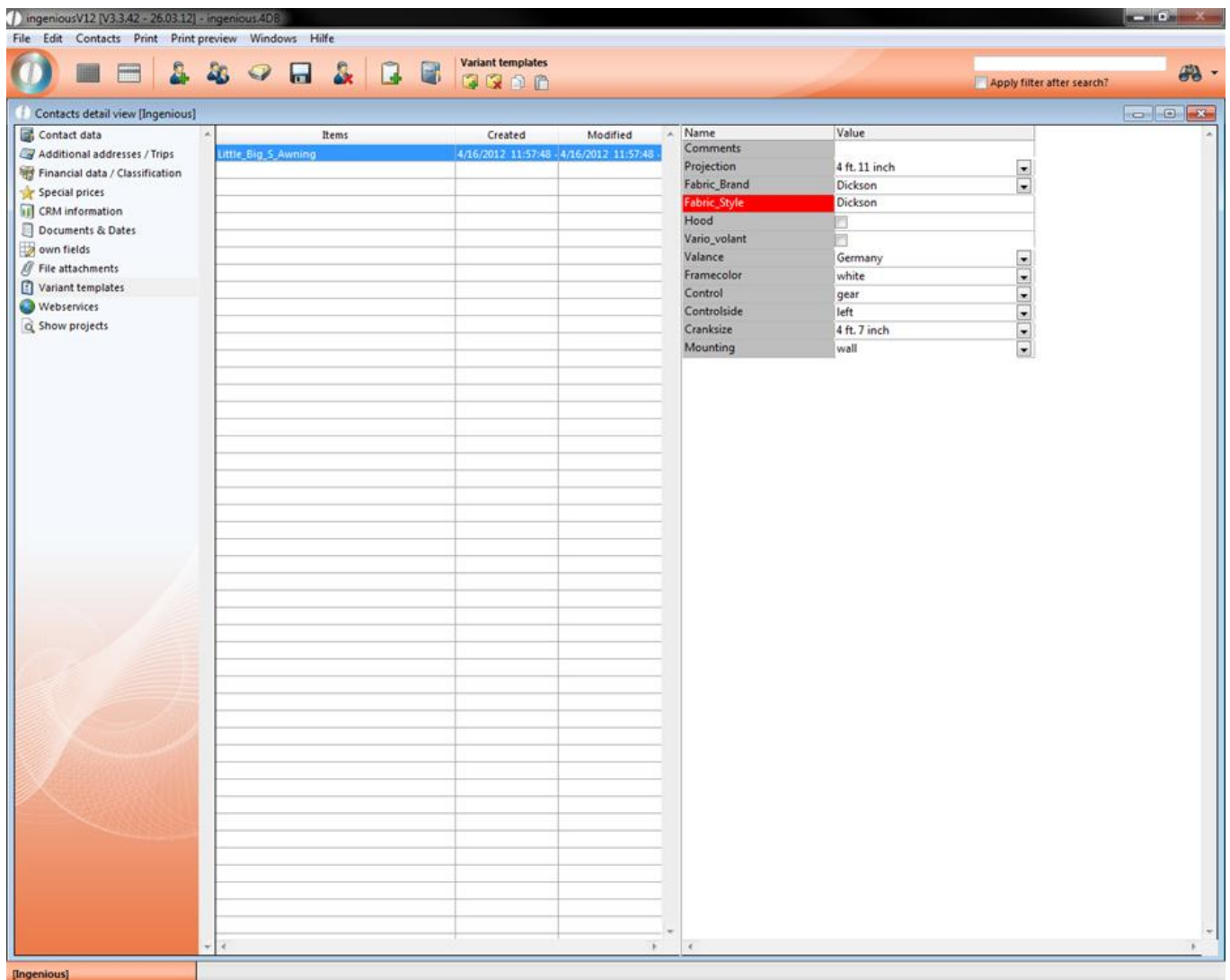
In the program settings, it can be determined in the column "Article" whether the variant templates should be included in the creation of new projects ("Include customized measurement data for new project positions"). With the creation of a new project, the presetting is then transferred automatically (also with multi-positions).



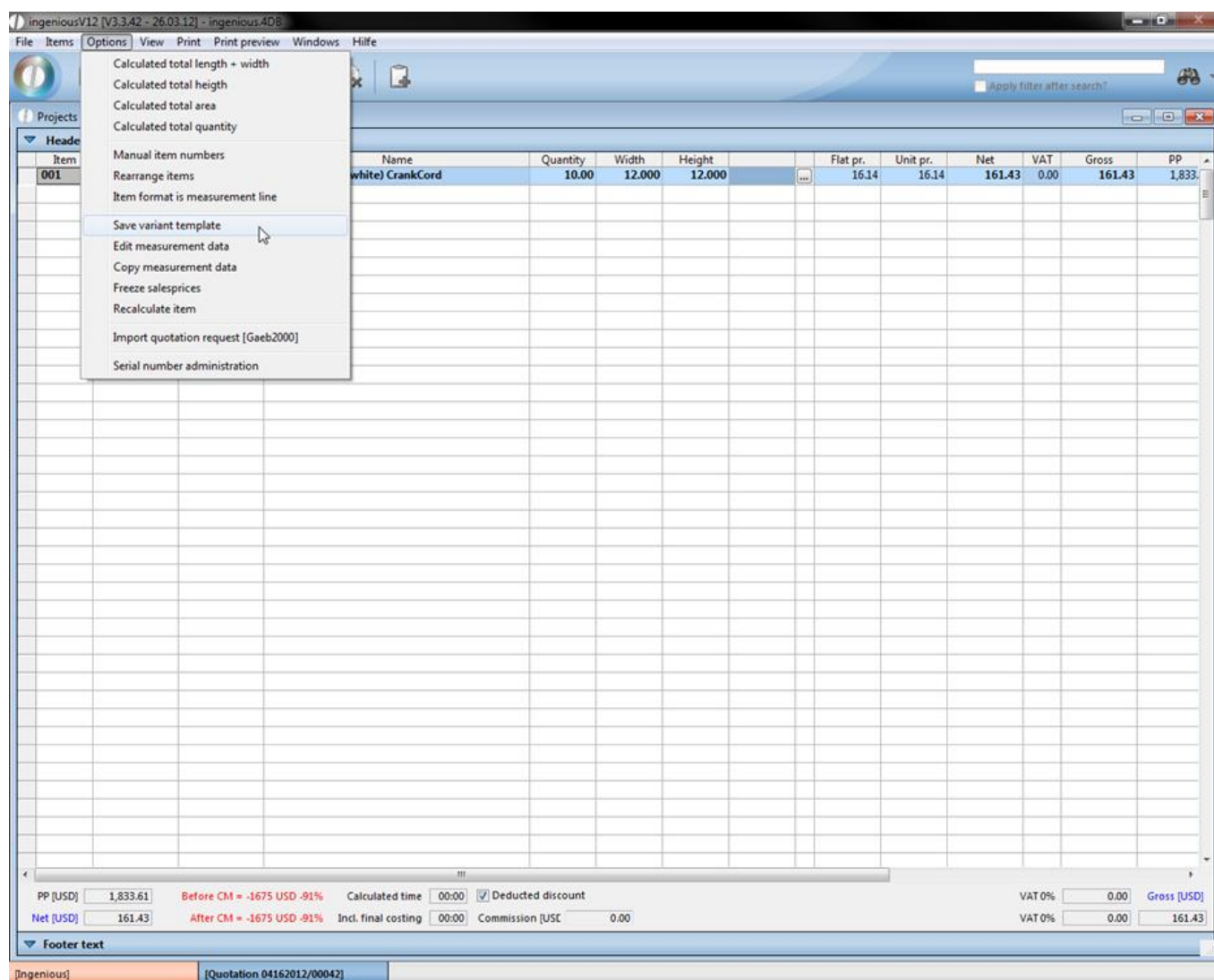
In the contact detail view, new variant templates can be applied with the  button "Select articles and accept". The product catalogue opens, in which you select the desired product by double-clicking. The example refers to the product, "D-Awning Cap ". You now have the possibility to make various changes to the measurements as requested by the contact.

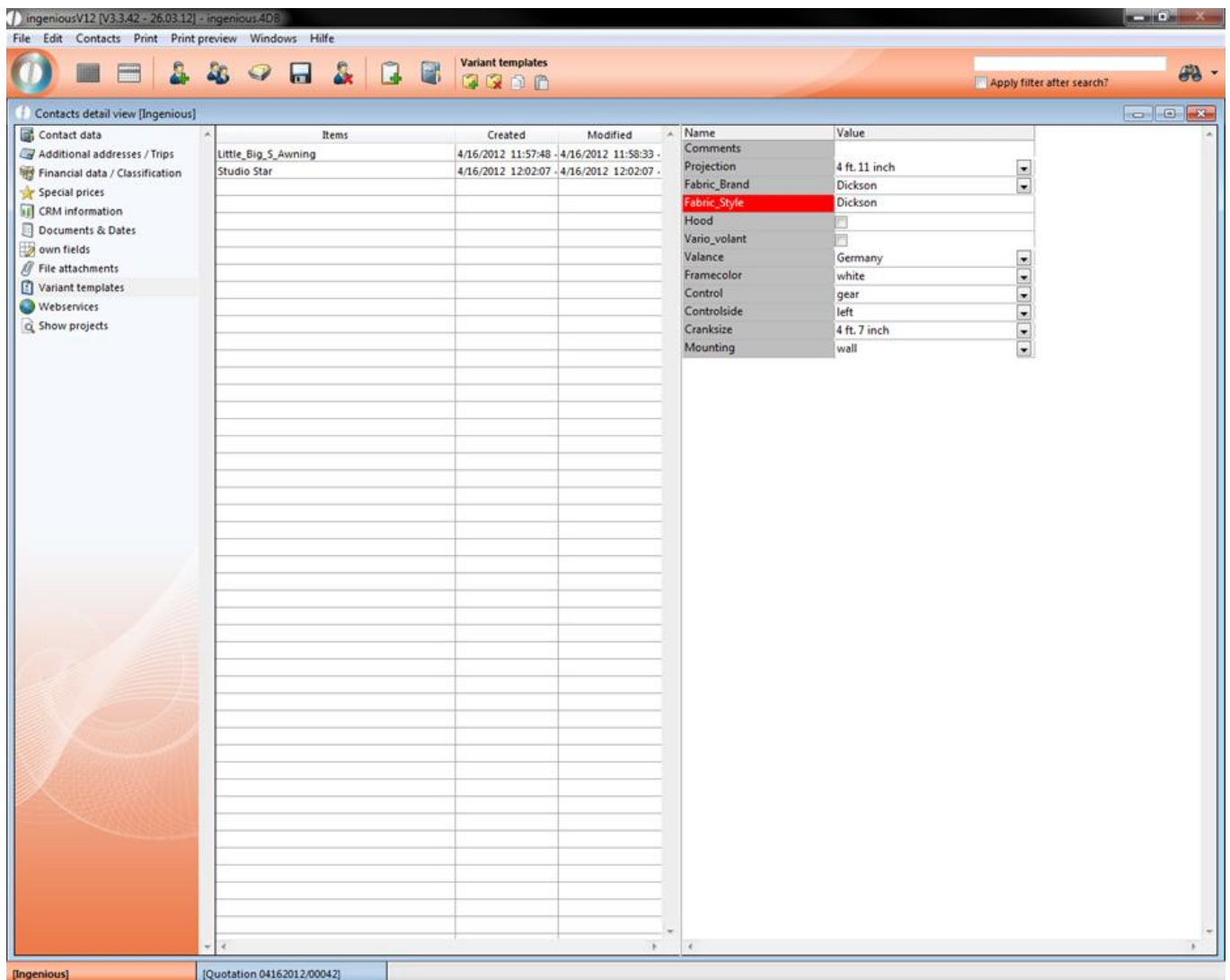


After you have accepted the changes with "OK", the article appears in the detail view. When you click on this, you will see the respective variant template in the right window.

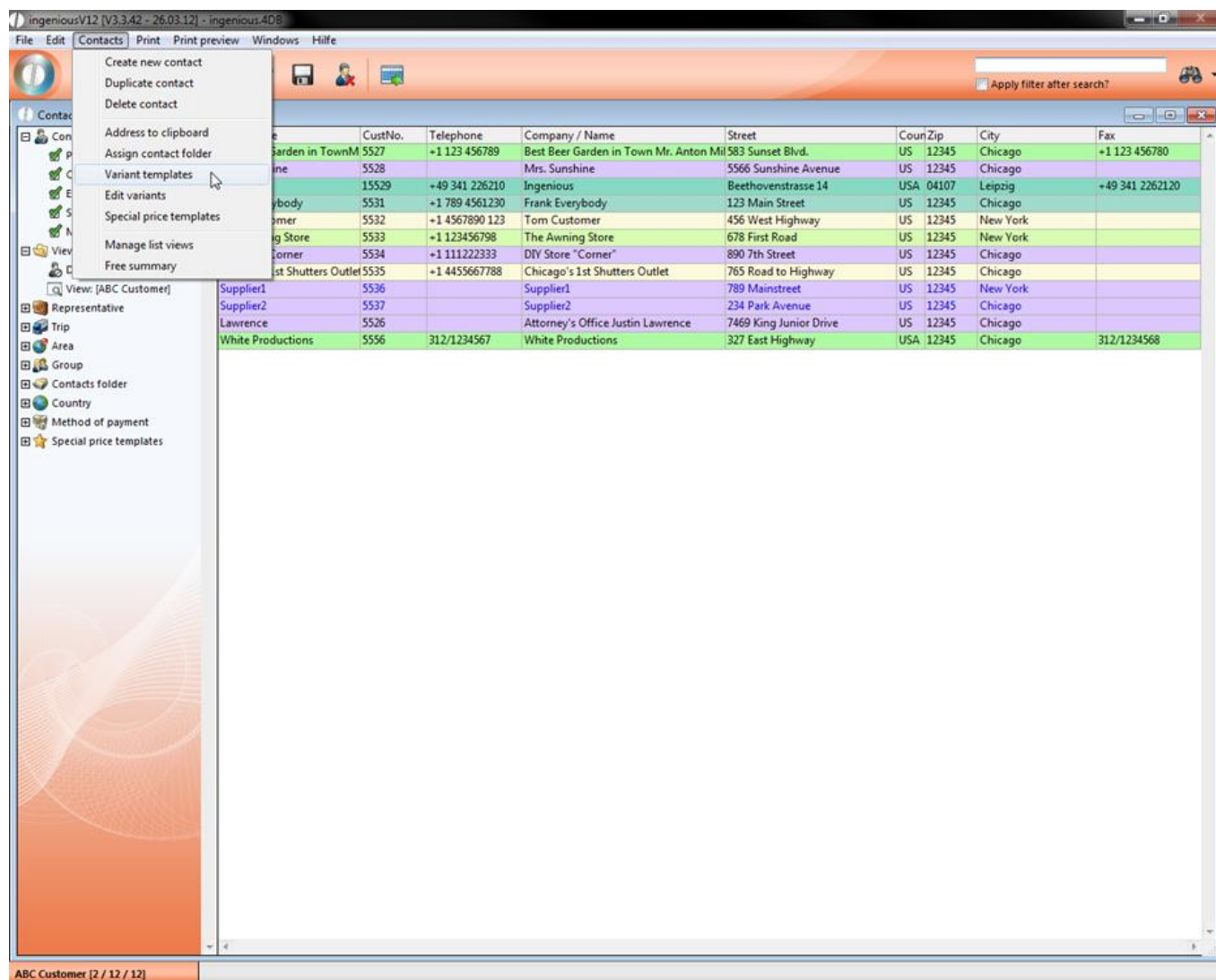


The variant templates can also be generated in the item view of the individual projects in the menu, "Options – Save variant templates". They can then be processed in the contact detail view.

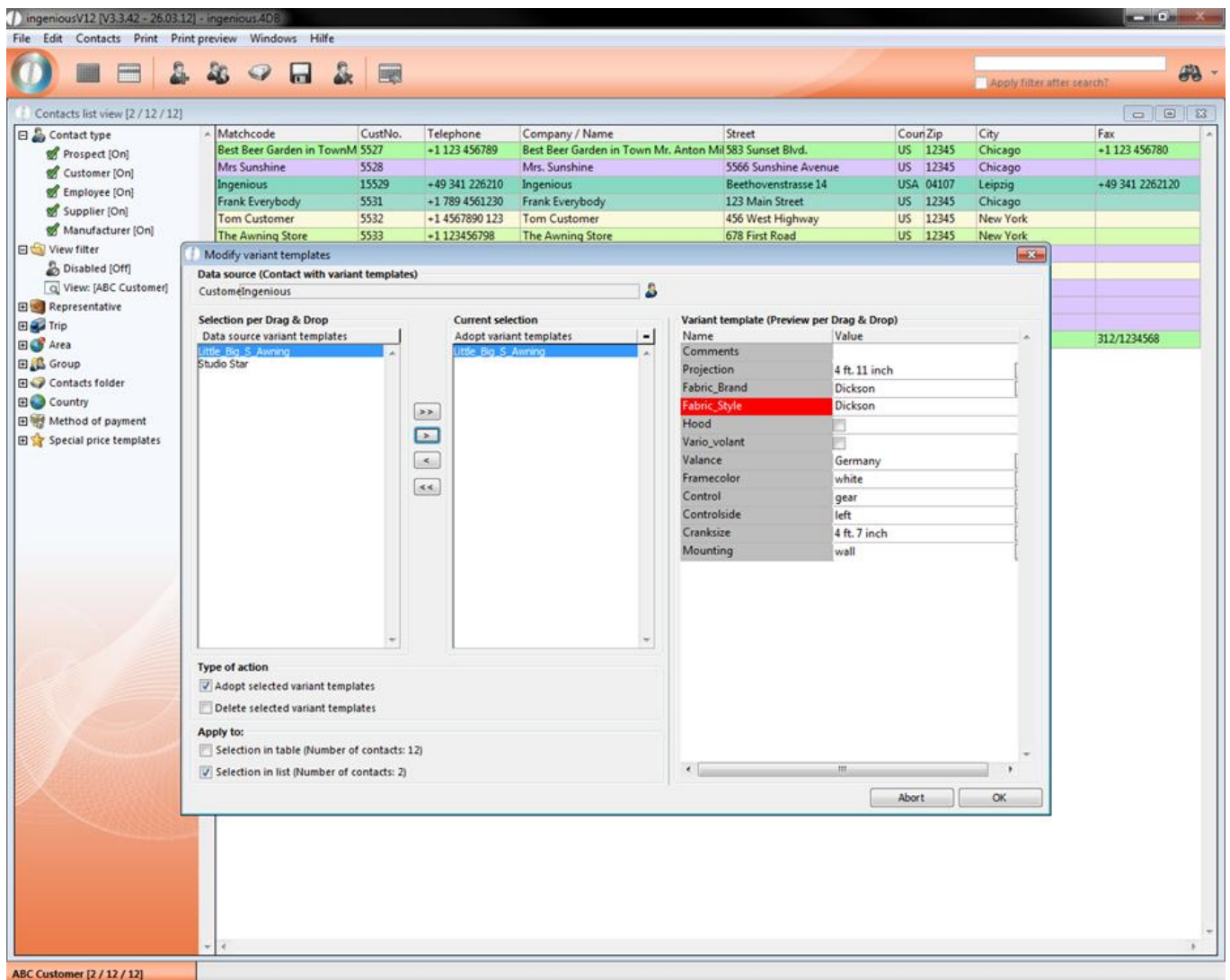




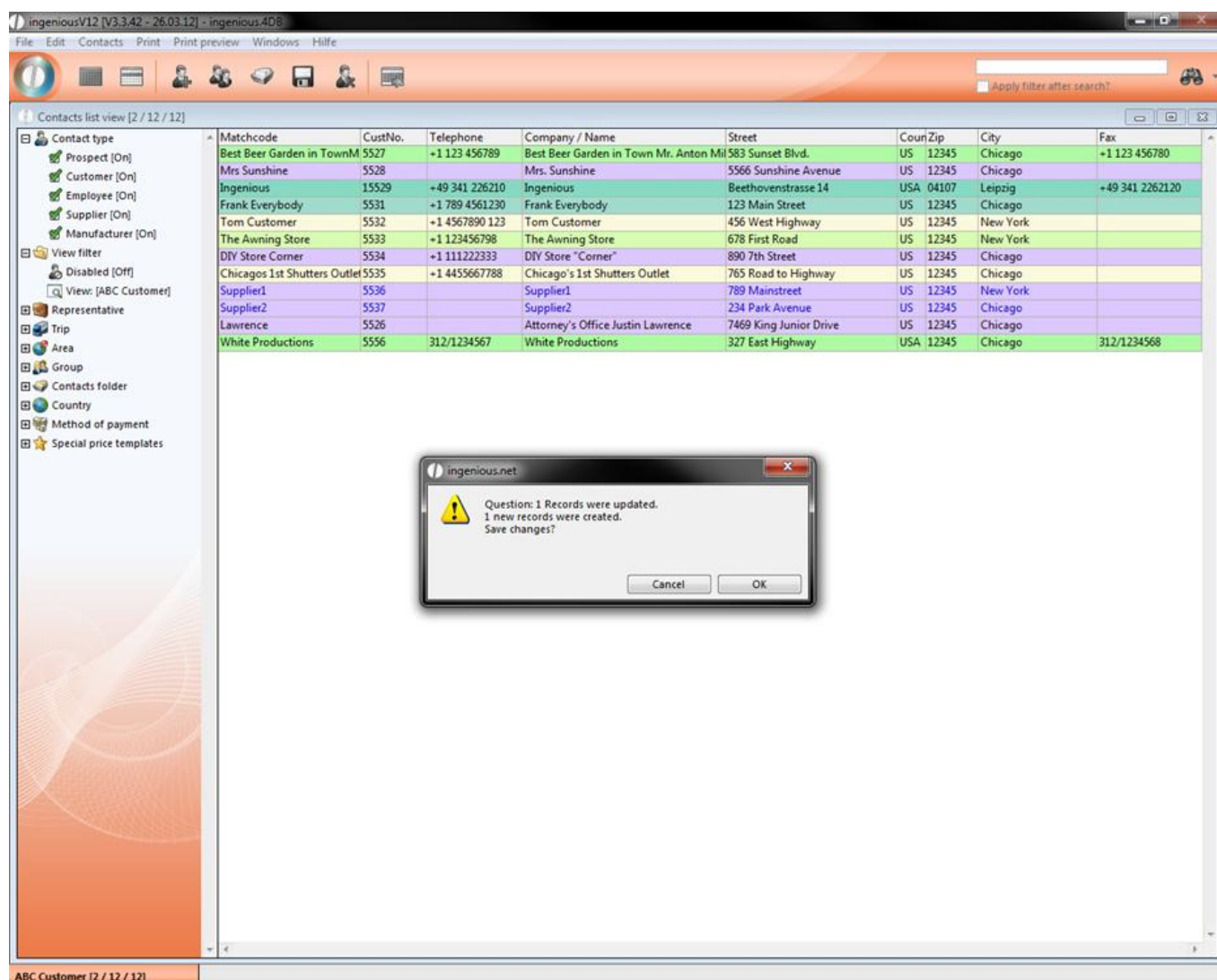
In addition, the variant templates can be transferred from one contact to another. Therefore mark the desired contacts in the contact list view and select the item "Variant templates" in the "Contacts" menu.



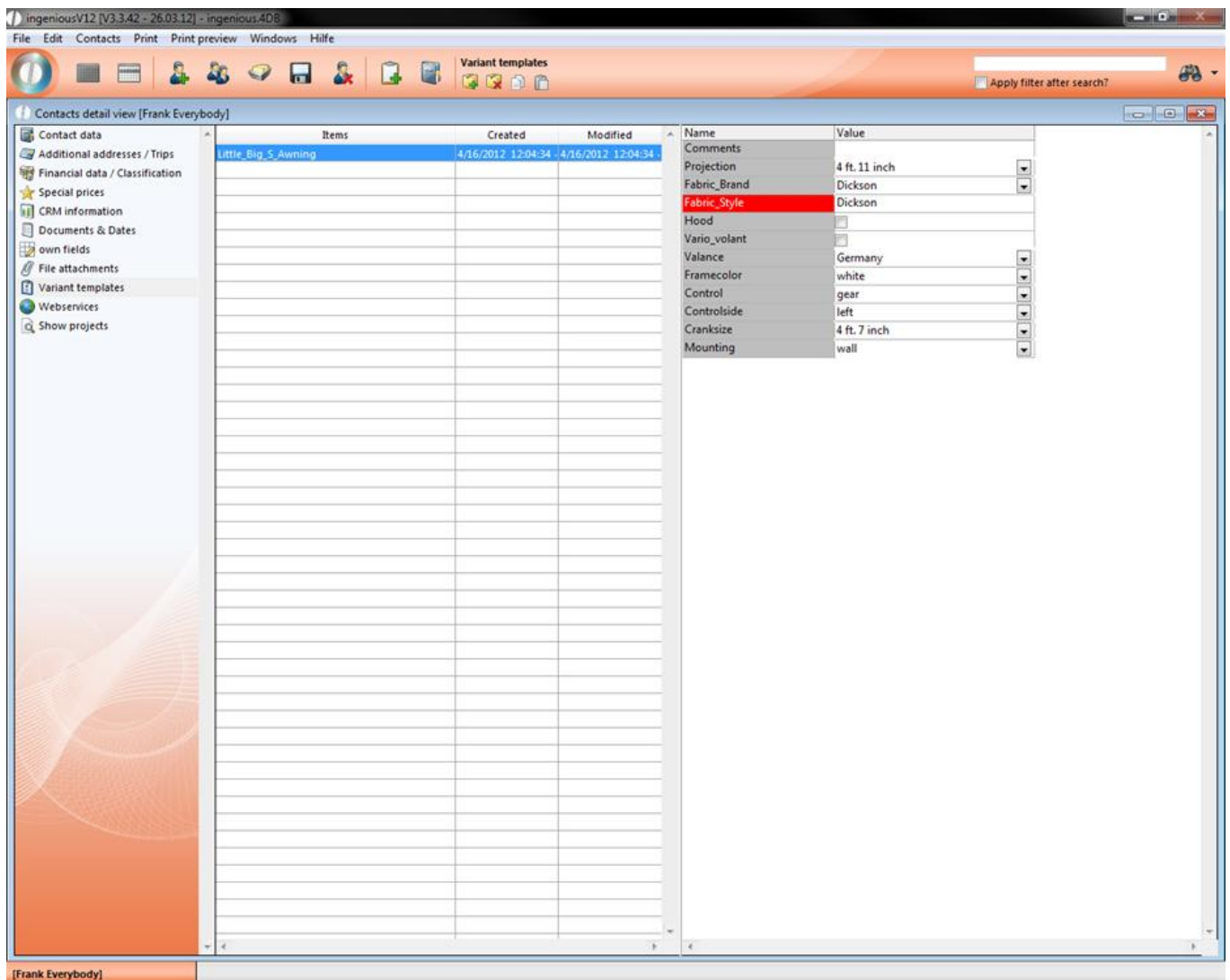
In the window that appears, you can now select the contact whose template should be transferred, then drag the template with the Drag & Drop function into the middle field.



Now select the desired transfer option and click on "OK". An information window will appear that displays how many records have been newly created. Confirm this window with "OK".



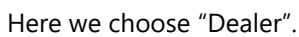
Every selected contact also has the desired article template.



3.1.2.10 Edit contacts variants

You can also transfer other parameters from one contact to another, like group, cash discount, payment term with discount, etc. The following example will show how the group membership of ingenious can be transferred to other contacts.

Go to the detail view of a contact. In "Financial data / Classification" change the group of the contact.



Back in the list view select the target contacts which will get the attributes from your source contact. If you want to select more than one contact use the hold down the ctrl-key.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Contacts Print Print preview Windows Hilfe

Apply filter after search?

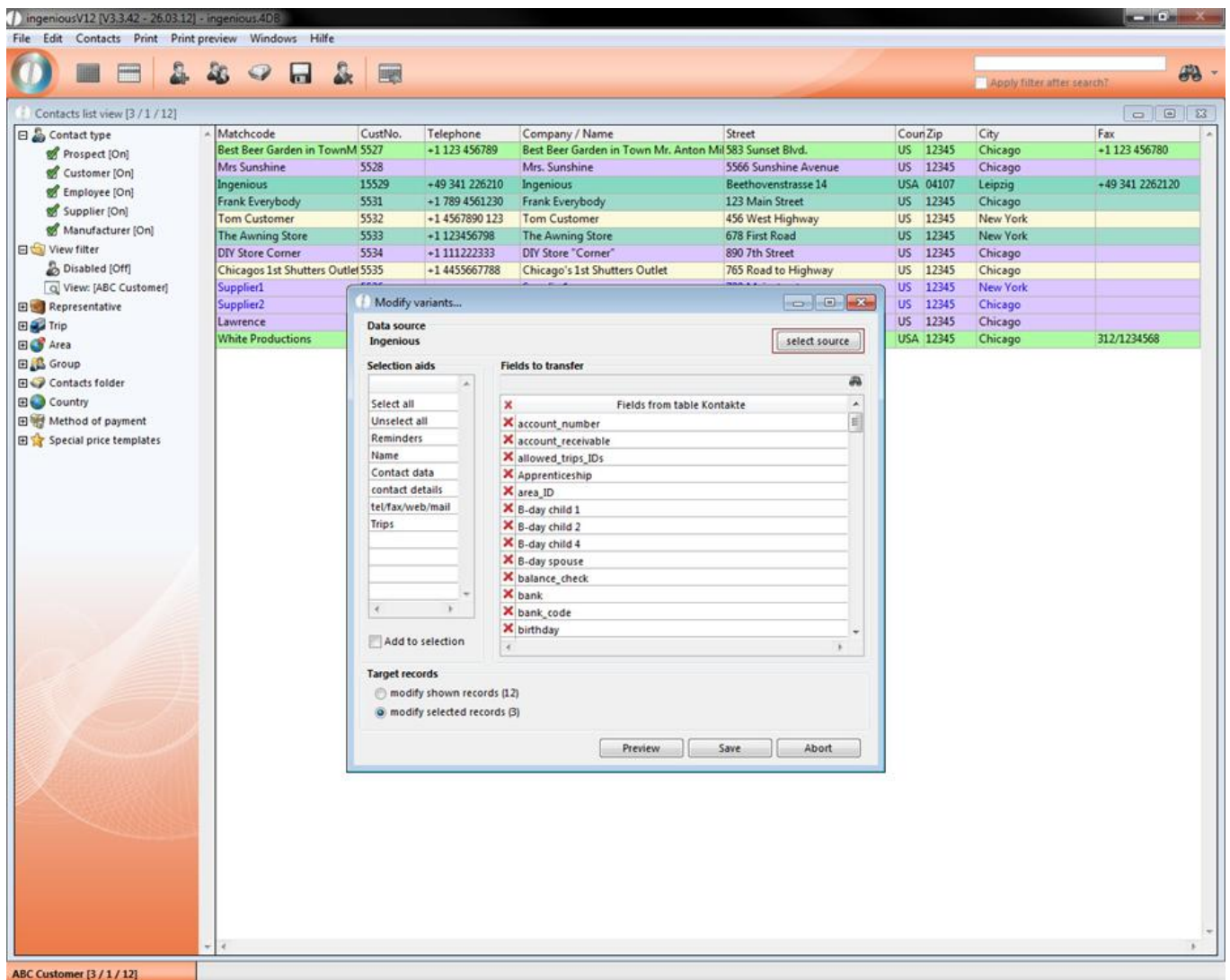
Contacts list view [3 / 12 / 12]

View filter: View: [ABC Customer]

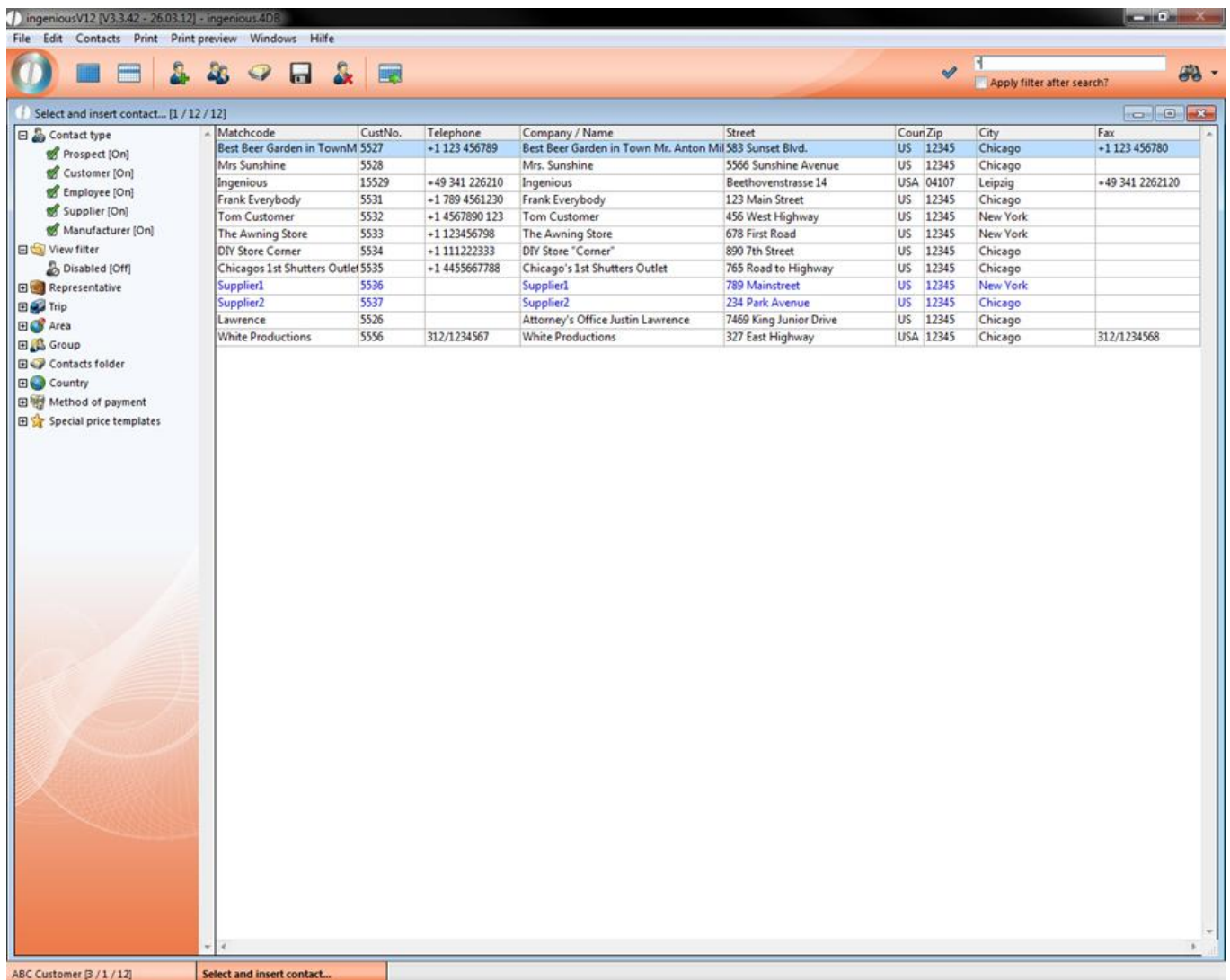
Matchcode	CustNo.	Telephone	Company / Name	Street	CounZip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US 12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US 12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA 04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US 12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US 12345	New York	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US 12345	New York	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US 12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US 12345	Chicago	
Supplier1	5536		Supplier1	789 Mainstreet	US 12345	New York	
Supplier2	5537		Supplier2	234 Park Avenue	US 12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US 12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA 12345	Chicago	312/1234568

ABC Customer [3 / 12 / 12]

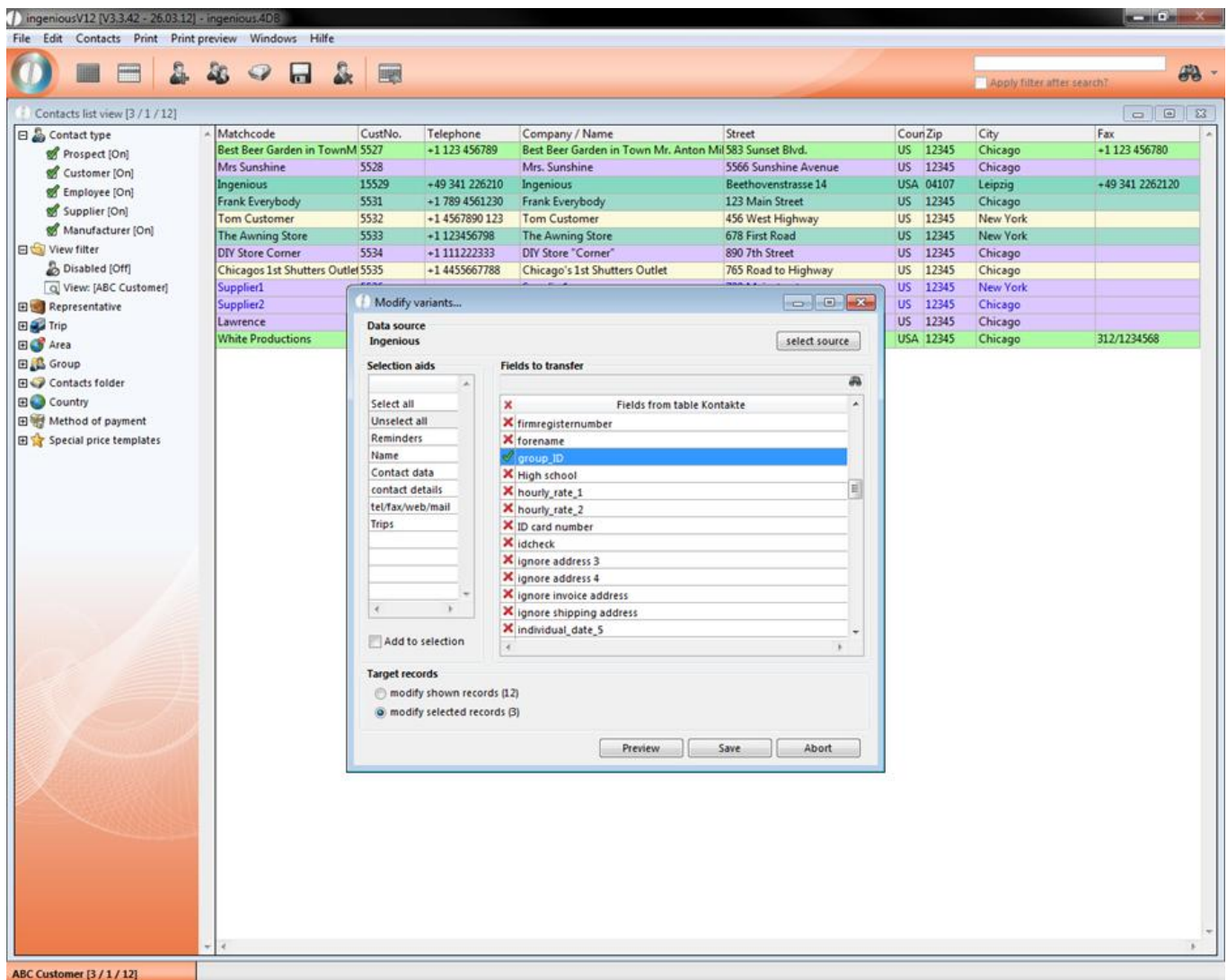
Select "Contacts – Edit variants"



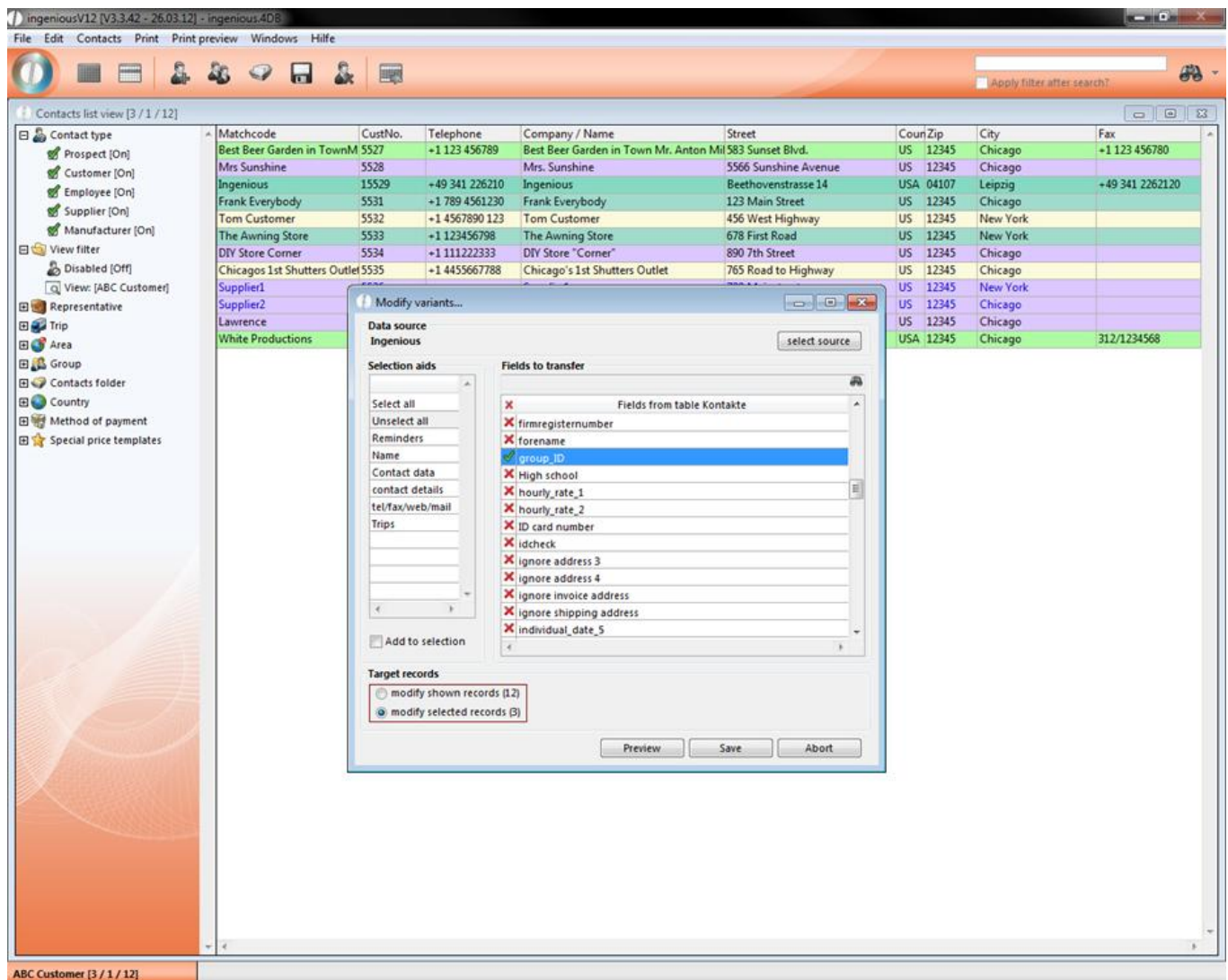
Click on "select source" to open another list view of the contact module where you select your source contact with a double click.



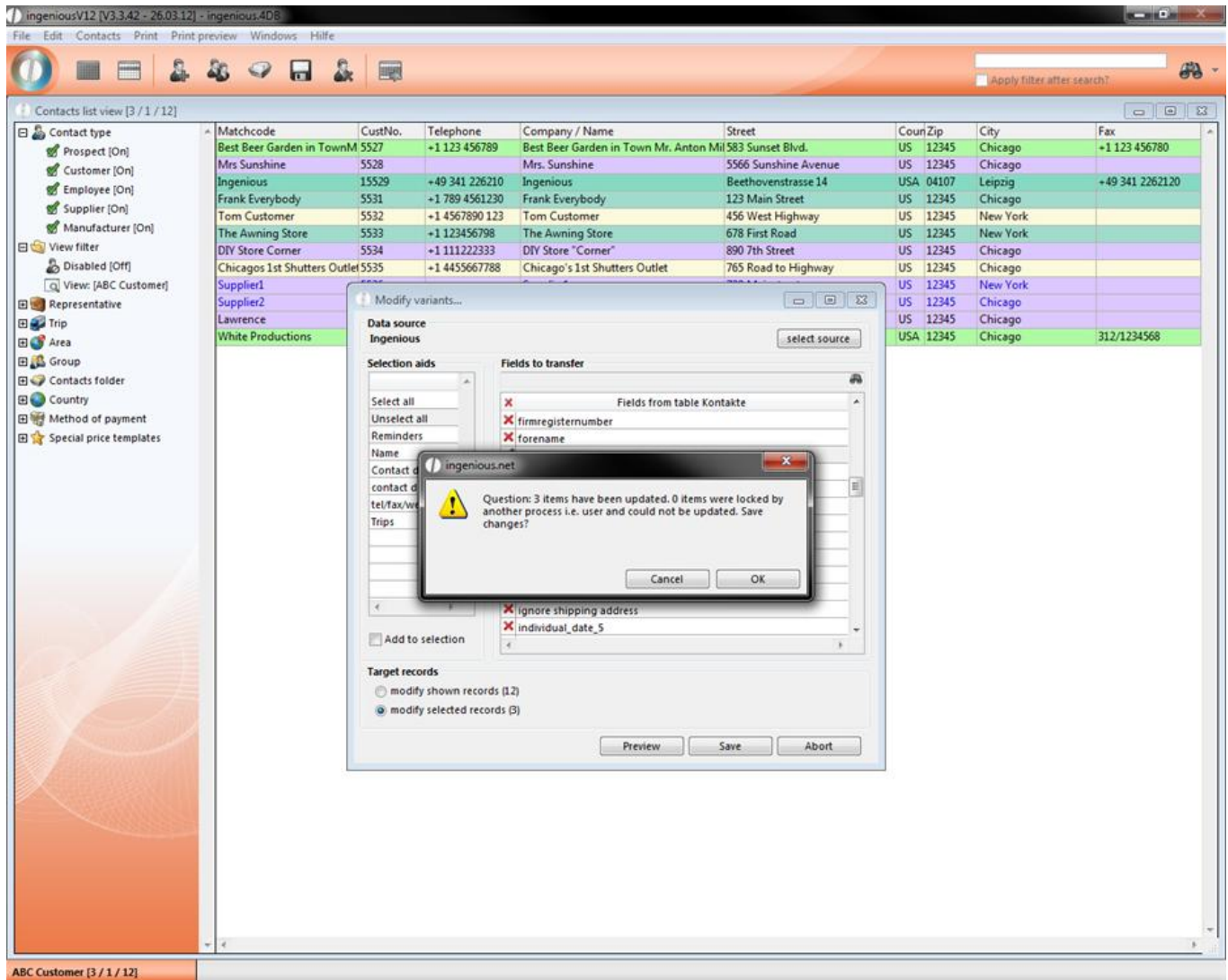
Back in the Edit variants window you can now select one of the pre defined selection aids in the left list or just create your own selection by double clicking the specific rows in the fields to transfer list.




In the area "target records" you can choose whether the attribute should be transferred to all contact records or only to the selected ones.

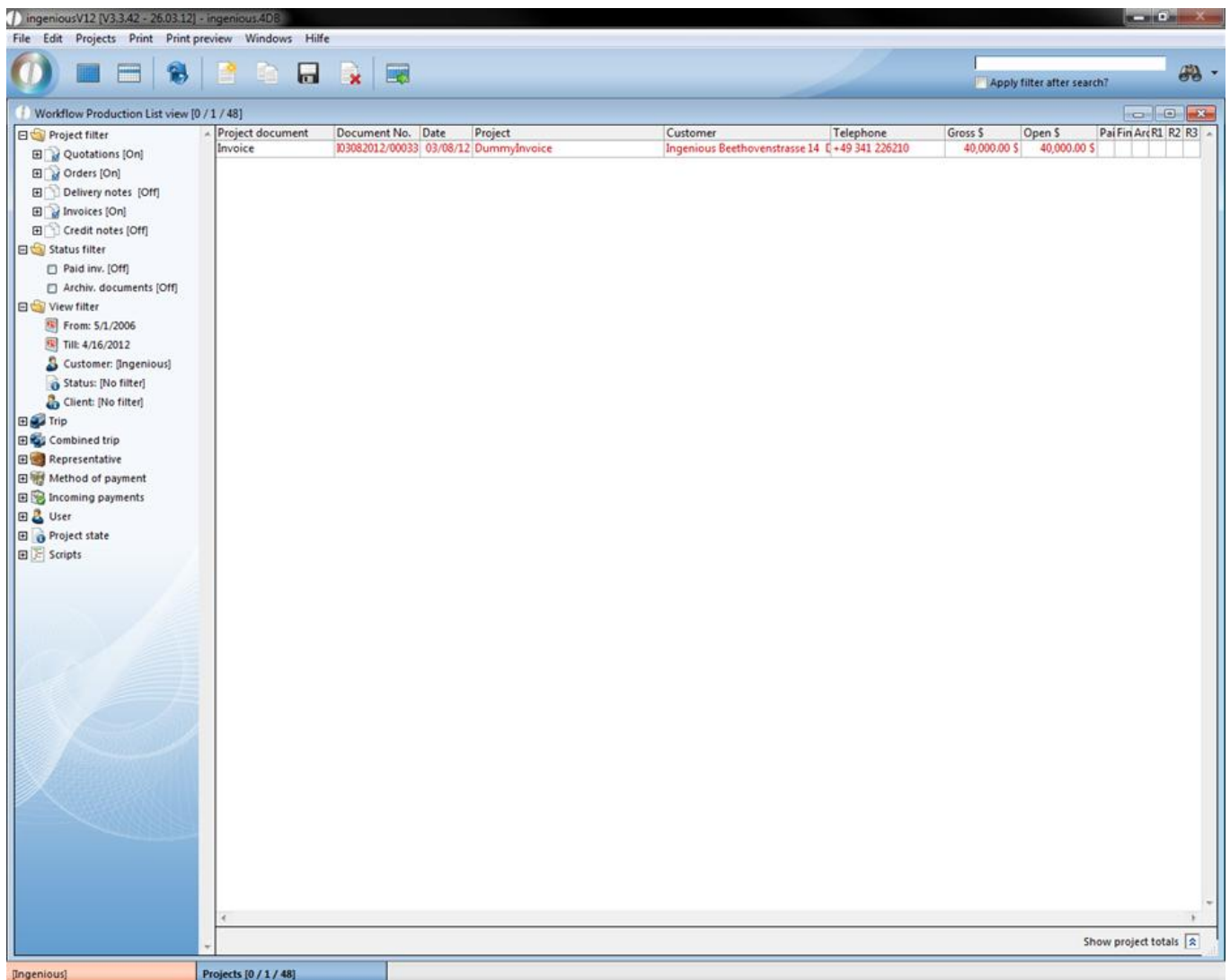


Now click save and a summary will open up where you have the last chance to accept or discard the changes.



3.1.2.11 Show projects


The last fixed column available is called "Show projects". This is the so-called workflow interface. If you click on  **Show projects**, the production module window opens and all projects related to the contact (Quotation, Invoice, Delivery Note, etc.) become visible in the list view that is displayed.

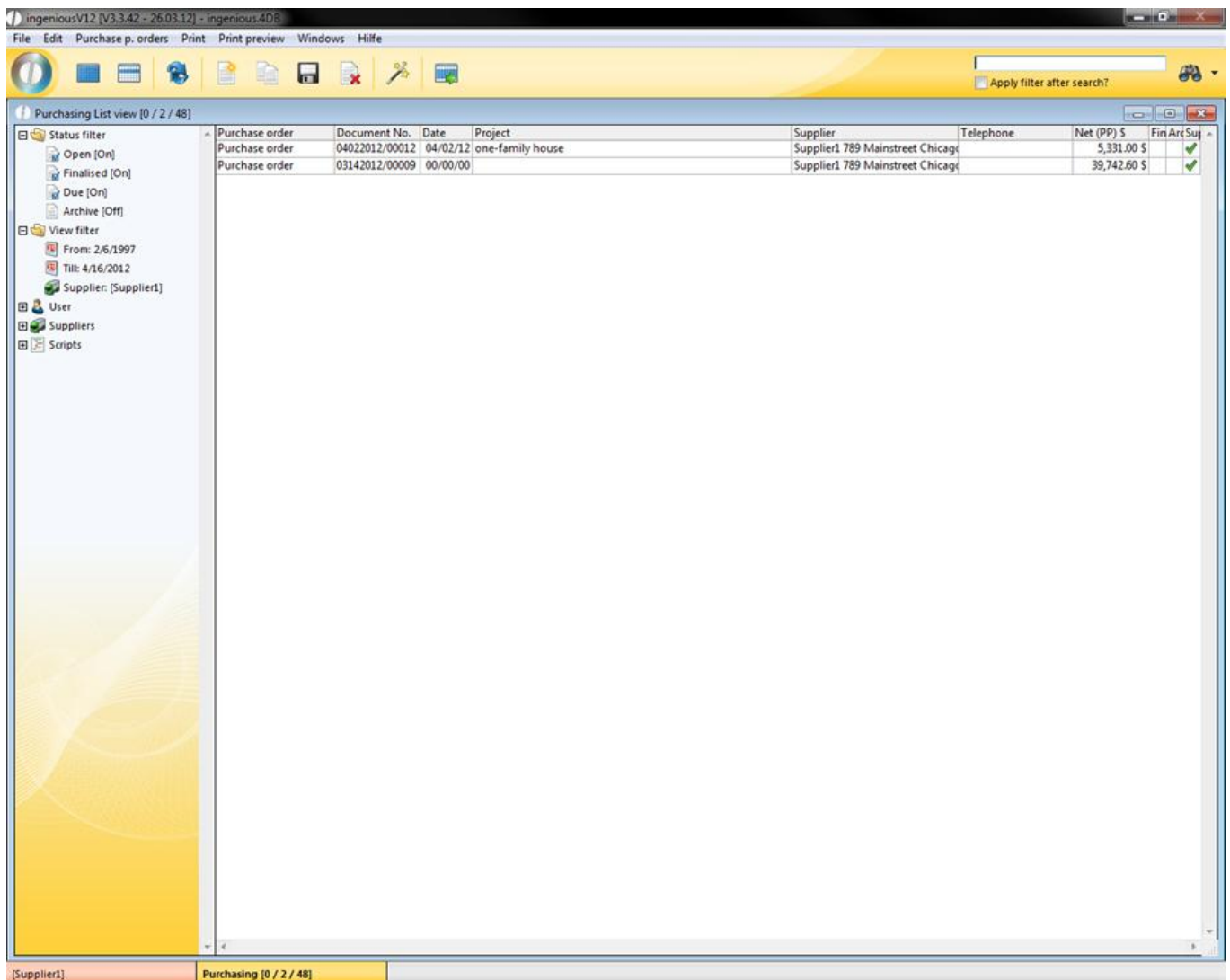


3.1.2.12 Show purchase orders

The "Show orders" detail view exists only in the supplier contact type.

The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42' and the database 'ingenious.408'. The menu bar includes 'File', 'Edit', 'Contacts', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains various icons for file operations and navigation. The sidebar on the left lists several modules: 'Contact data', 'Additional addresses / Trips', 'Financial data / Classification', 'Special prices', 'CRM information', 'Documents & Dates', 'own fields', 'File attachments', 'Webservices', 'Show projects', and 'Show purchasing orders'. The main content area is titled 'Contacts detail view [Supplier1]'. It is divided into three main sections: 'Miscellaneous', 'Communication', and 'Notes'. The 'Miscellaneous' section includes fields for 'Matchcode' (Supplier1), 'Customer number' (5536), 'Company / Name' (Supplier1), 'Street' (789 Mainstreet), 'Country' (US), 'State' (dropdown), 'ZIP' (12345), 'City' (New York), 'P.O. Box' (dropdown), 'Birthday' (00/00/00), 'Contact person' (dropdown), and 'Salutation' (Dear Mr. & Mrs.). The 'Communication' section includes fields for 'Phone', 'Fax', 'Email', and 'WWW'. The 'Notes' section has a 'PinUp note' field. At the bottom, there is a status bar showing 'Created 4/27/2007 09:32:14 - jaeger' and 'Modified 4/10/2012 09:05:16 - admin'. A checkbox 'Show notes in project' is also present.

This column represents the interface for the “Purchasing” module. If you click on  **Show purchasing orders**, the purchasing module window opens and all orders for the contacts are clearly displayed in the list view.



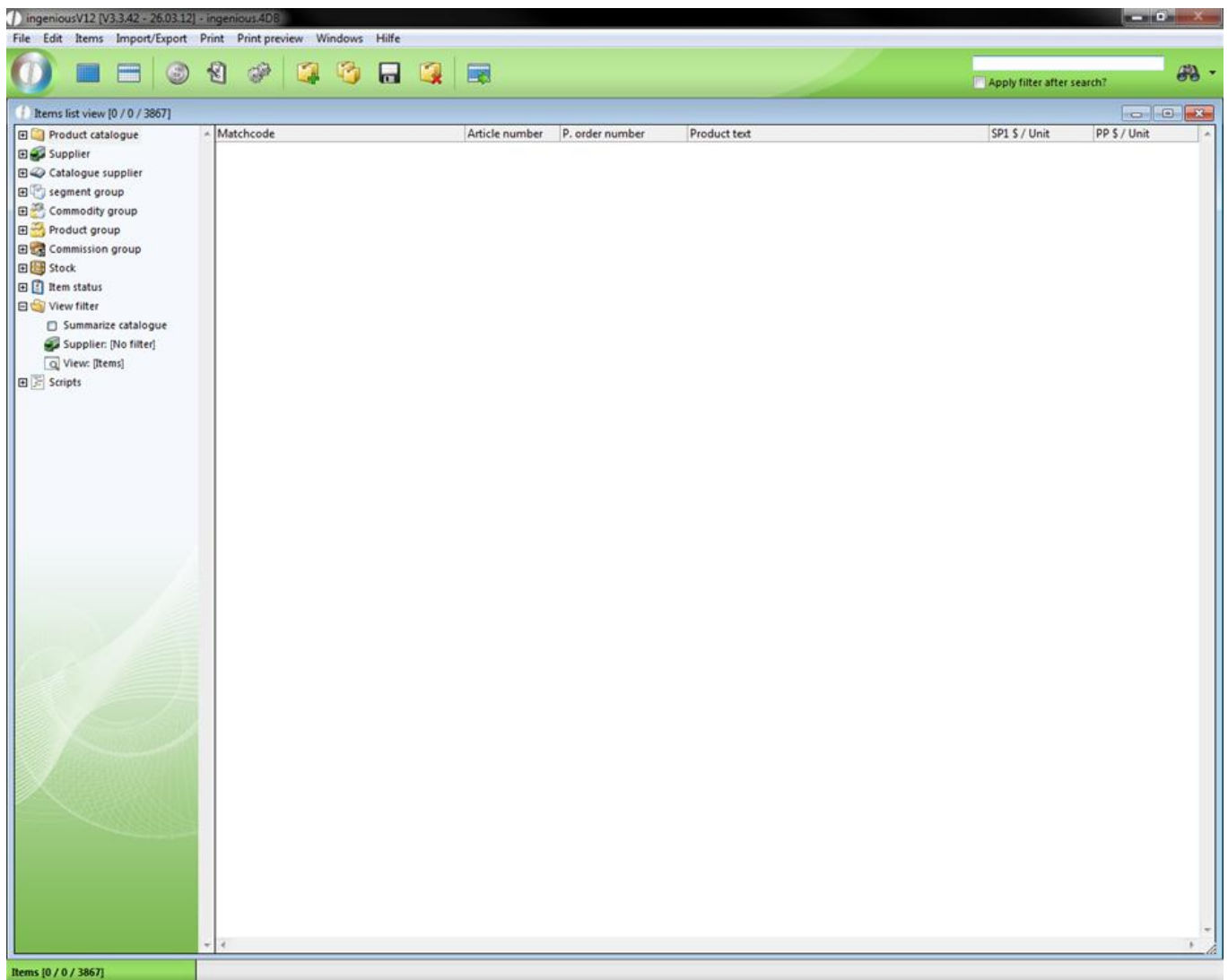
3.2 Items

3.2.1 The items list view

3.2.1.1 The items list view

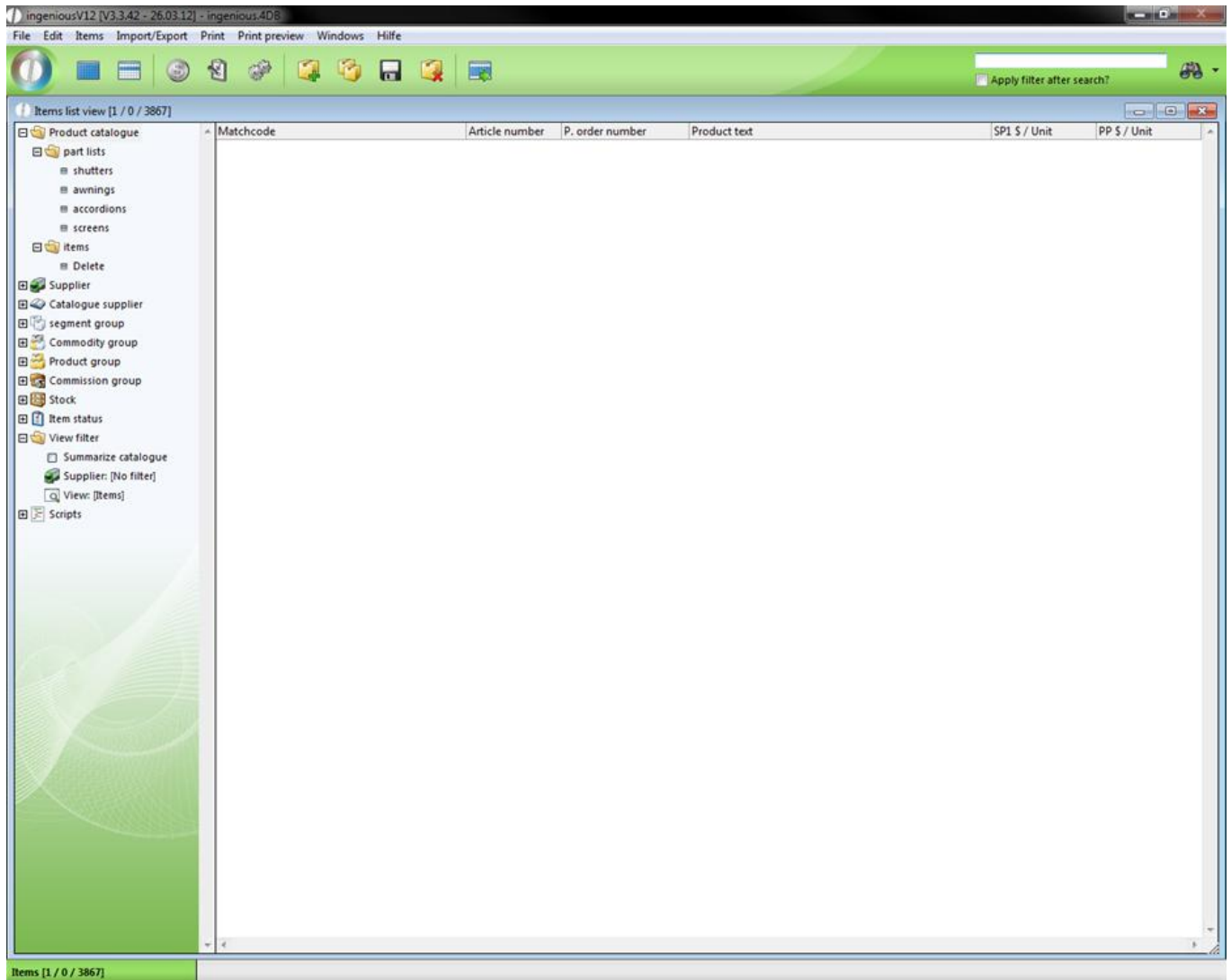
The Ingenious.V12 integrated article and part list module offers you comprehensive possibilities to import, create and maintain articles and to manage them in clear lists. With the help of intelligent functions, article variations can be generated, part lists can be programmed and labels and manufacturing documents can be printed.

Just as it is shown in the "Contacts" module, the clear representation of the most important data is shown in the "Items" module.



3.2.1.2 The product catalogue

In order to keep the overview of all your items, it is advisable to sort and arrange these according to logical criteria. Since the developers of Ingenious.V12 did not want to anticipate by which criteria you sort, Ingenious.V12 conceived it so that everything is in your own hands.

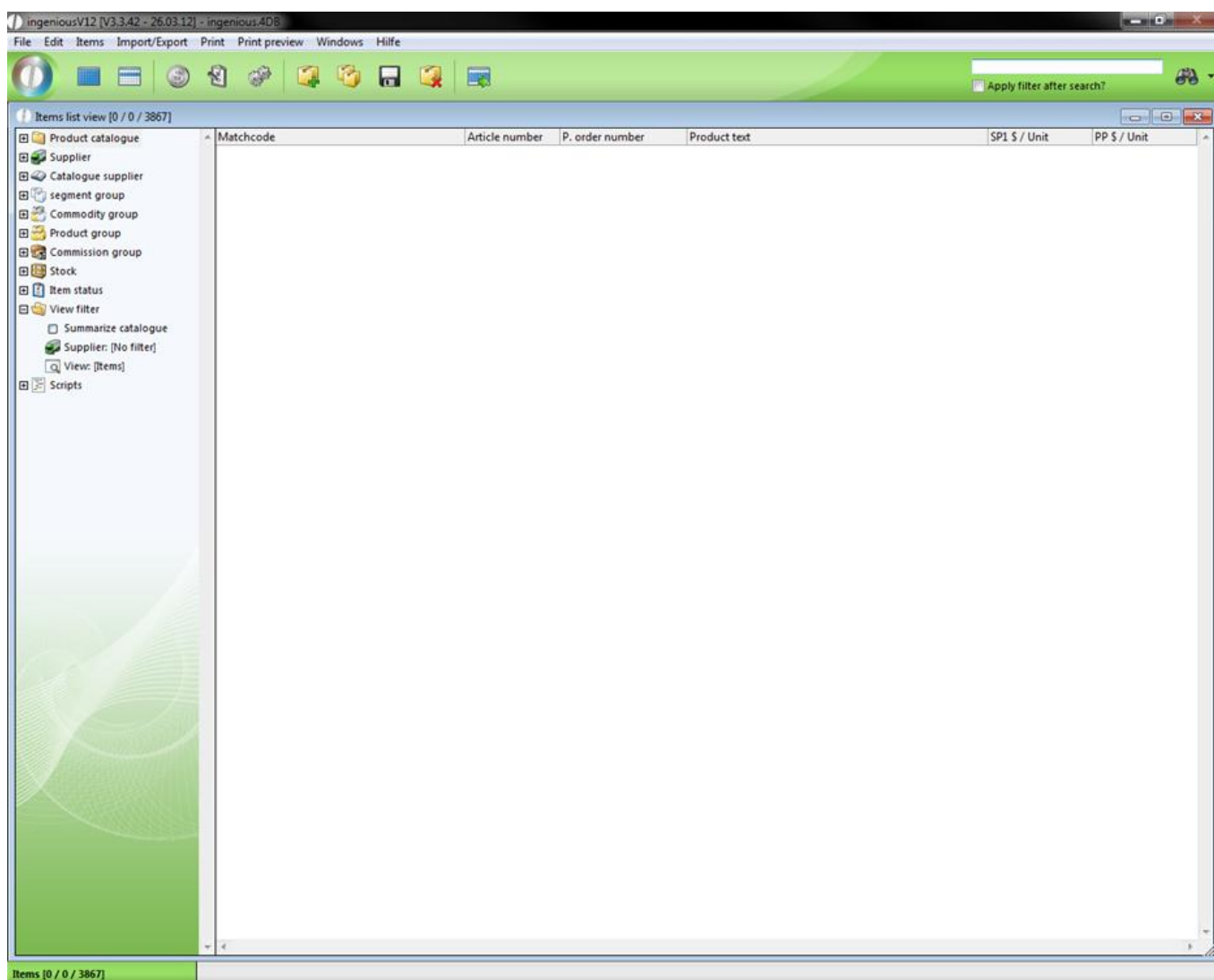


In addition, the product catalogue operates within the structure range of the files. This file is designed to group all of your items according to any criteria. In addition, you can provide as many subfolders as desired. This file structure should be as clear as possible. It is best to give individual files a short and precise name so that questions regarding content are not left open. Consider exactly, according to which criteria the first level is to be sorted. This decision is then the default for the next levels.

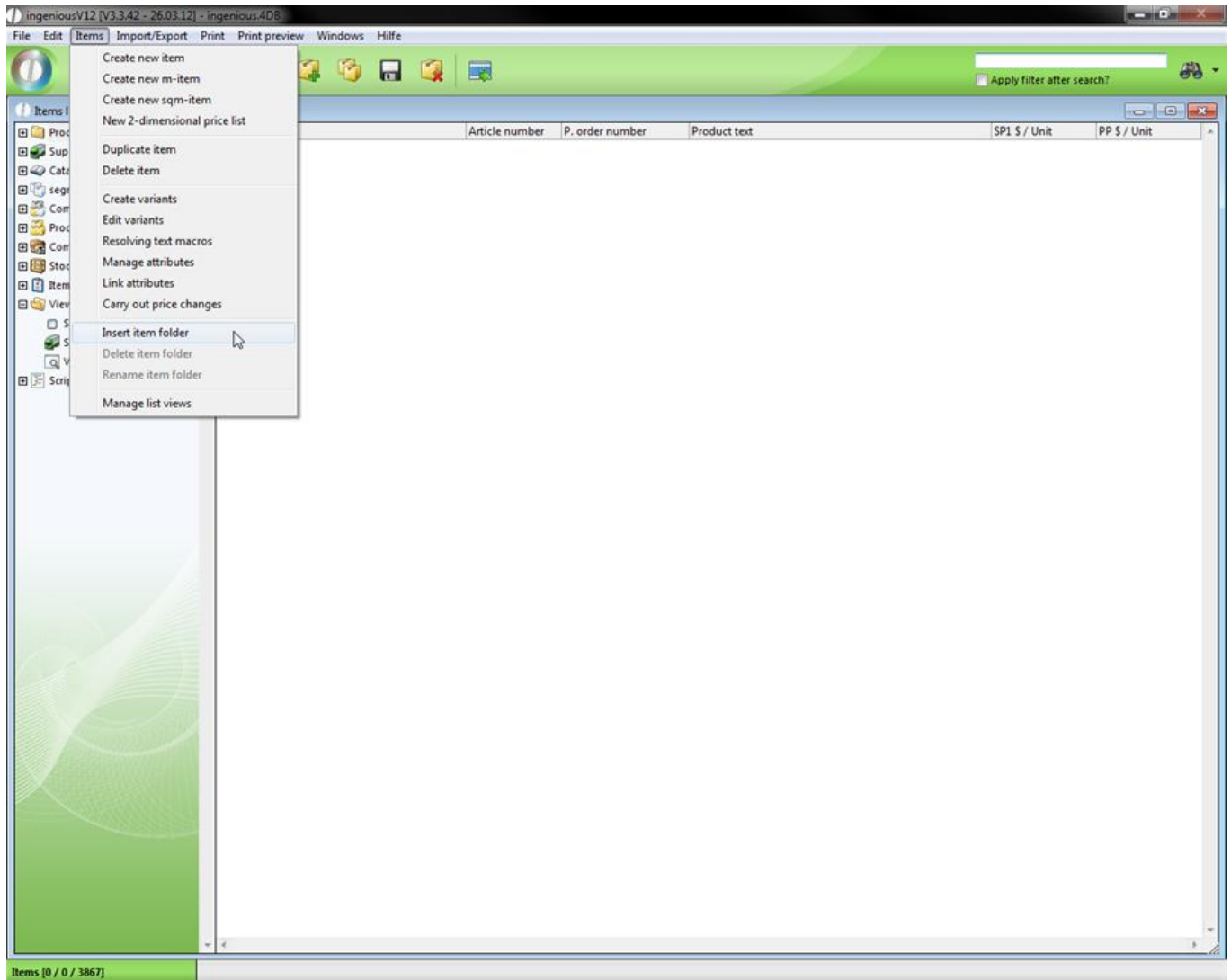
Note also that your product catalogue is really efficient only if one path leads to each product.

Practice creating folders

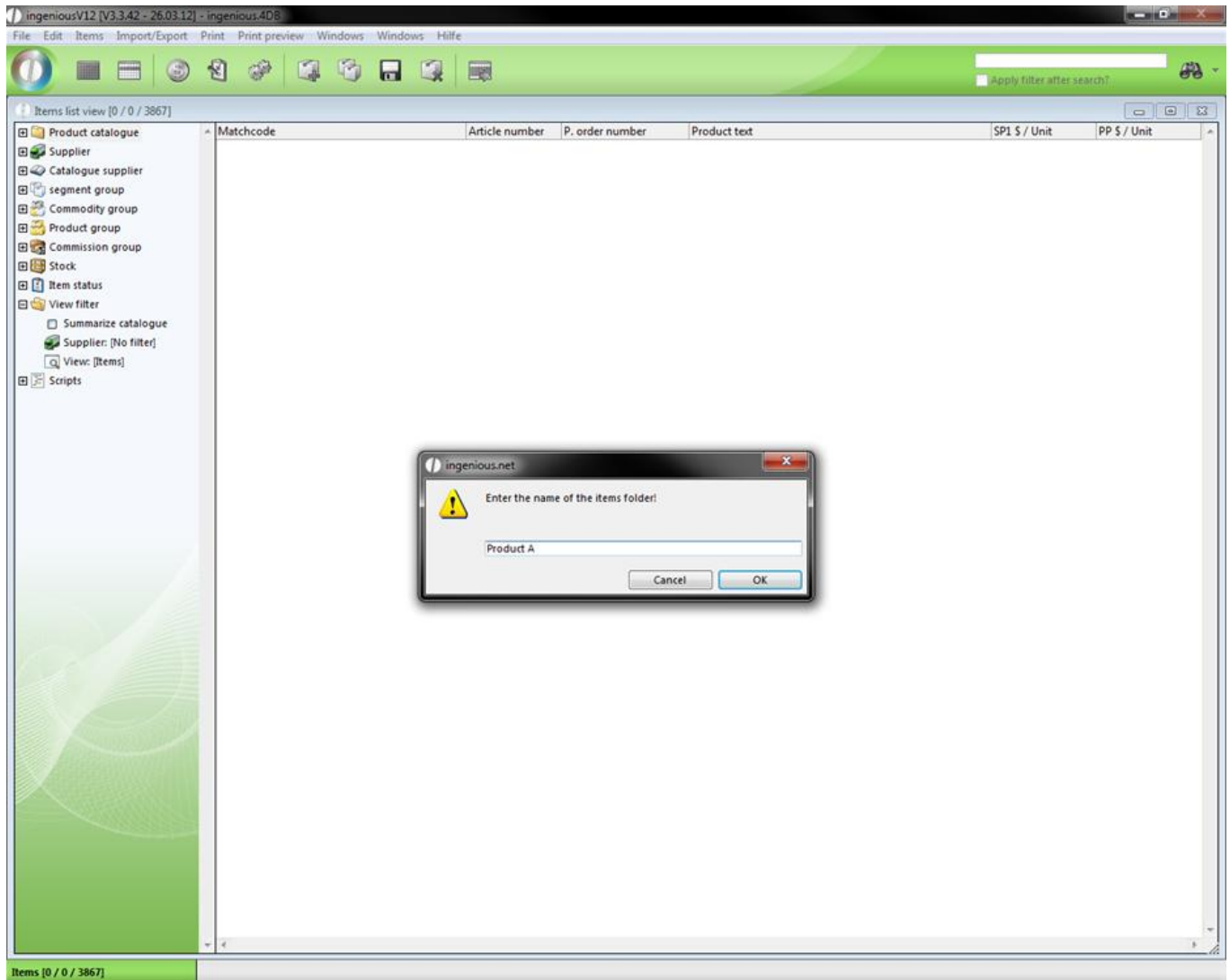
1. Highlight the folder with the "Product catalogue" label.



2. In the main menu, select the menu item, "Items/Insert item folder".



3. A window appears where you can name the list. Here enter "Product A" and confirm with "OK".



In the product catalogue folder, you will find a new file with the name "Product A". Because the file still has no contents, it has the article icon  instead of the file icon . The icon changes with the first entry in this folder.

4. Highlight the newly-created folder with "Product A". Select the entry, "Items/Insert item folder" in the main menu. Give the new file the name "Material".

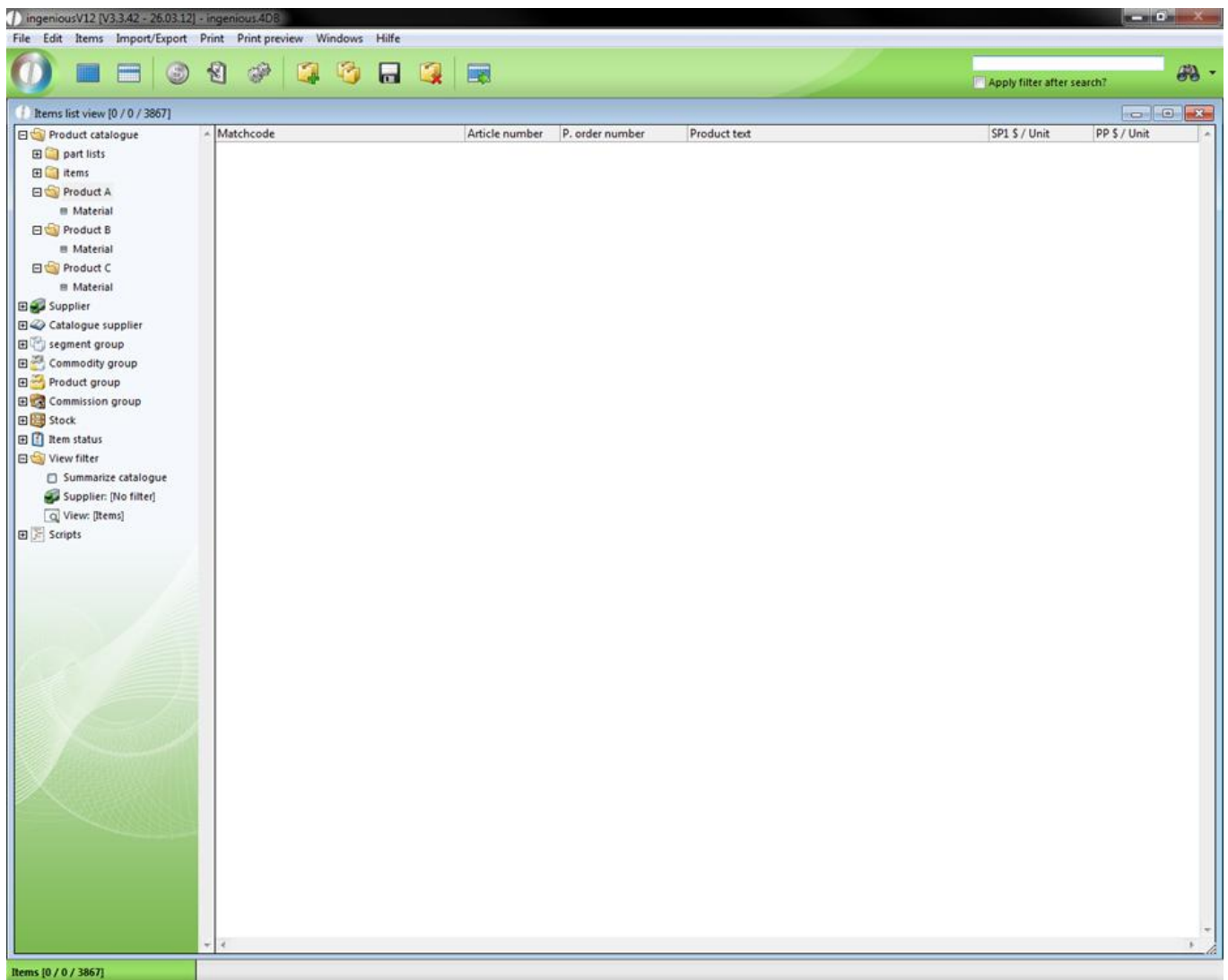
5. You would now like to create a folder for a second product. To do this, you must mark the item catalogue folder again. This is because the folder that is to be created is always provided in the active (selected) folder.

6. Repeat step 2 - 4. Designate the first folder with "Product B" and the second again with "Material".

Good luck! You have completed the preconditions for a simple grouping. The product catalogue incidentally sorts the entries alphabetically. This will give you a little more of an overview in your own article catalogue.


7. Repeat steps 1 - 4 again with the values, "Product C" and "Material".

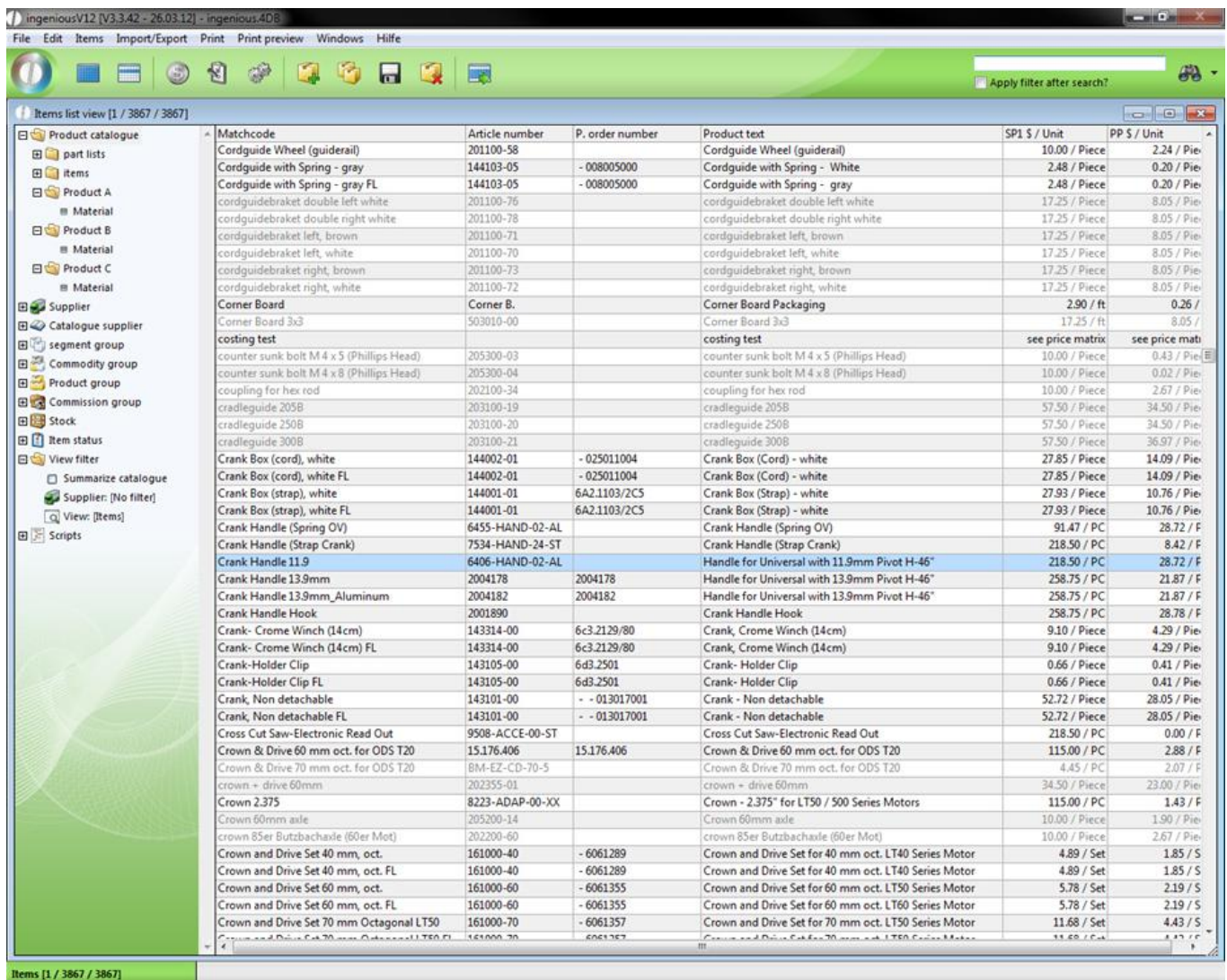
Now your product catalogue contains the files created by you in addition to those pre-installed by Ingenious.V12:



In the next two exercises, you will learn how to create items and place them into the product catalogue.

Practice incorporating a product into the product catalogue

1. Go to the "Product catalogue" folder and click on  "List all items". Look for the sample record with the product number "6406-HAND-02-AL" in the list view.



Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Cordguide Wheel (guiderail)	201100-58		Cordguide Wheel (guiderail)	10.00 / Piece	2.24 / Piece
Cordguide with Spring - gray	144103-05	- 008005000	Cordguide with Spring - White	2.48 / Piece	0.20 / Piece
Cordguide with Spring - gray FL	144103-05	- 008005000	Cordguide with Spring - gray	2.48 / Piece	0.20 / Piece
cordguidebraket double left white	201100-76		cordguidebraket double left white	17.25 / Piece	8.05 / Piece
cordguidebraket double right white	201100-78		cordguidebraket double right white	17.25 / Piece	8.05 / Piece
cordguidebraket left, brown	201100-71		cordguidebraket left, brown	17.25 / Piece	8.05 / Piece
cordguidebraket left, white	201100-70		cordguidebraket left, white	17.25 / Piece	8.05 / Piece
cordguidebraket right, brown	201100-73		cordguidebraket right, brown	17.25 / Piece	8.05 / Piece
cordguidebraket right, white	201100-72		cordguidebraket right, white	17.25 / Piece	8.05 / Piece
Corner Board	Corner B.		Corner Board Packaging	2.90 / ft	0.26 / ft
Corner Board 3x3	503010-00		Corner Board 3x3	17.25 / ft	8.05 / ft
costing test			costing test	see price matrix	see price matrix
counter sunk bolt M 4 x 5 (Phillips Head)	205300-03		counter sunk bolt M 4 x 5 (Phillips Head)	10.00 / Piece	0.43 / Piece
counter sunk bolt M 4 x 8 (Phillips Head)	205300-04		counter sunk bolt M 4 x 8 (Phillips Head)	10.00 / Piece	0.02 / Piece
coupling for hex rod	202100-34		coupling for hex rod	10.00 / Piece	2.67 / Piece
cradleguide 205B	203100-19		cradleguide 205B	57.50 / Piece	34.50 / Piece
cradleguide 250B	203100-20		cradleguide 250B	57.50 / Piece	34.50 / Piece
cradleguide 300B	203100-21		cradleguide 300B	57.50 / Piece	36.97 / Piece
Crank Box (cord), white	144002-01	- 025011004	Crank Box (Cord) - white	27.85 / Piece	14.09 / Piece
Crank Box (cord), white FL	144002-01	- 025011004	Crank Box (Cord) - white	27.85 / Piece	14.09 / Piece
Crank Box (strap), white	144001-01	6A2.1103/2C5	Crank Box (Strap) - white	27.93 / Piece	10.76 / Piece
Crank Box (strap), white FL	144001-01	6A2.1103/2C5	Crank Box (Strap) - white	27.93 / Piece	10.76 / Piece
Crank Handle (Spring OV)	6455-HAND-02-AL		Crank Handle (Spring OV)	91.47 / PC	28.72 / F
Crank Handle (Strap Crank)	7534-HAND-24-ST		Crank Handle (Strap Crank)	218.50 / PC	8.42 / F
Crank Handle 11.9	6406-HAND-02-AL		Handle for Universal with 11.9mm Pivot H-46"	218.50 / PC	28.72 / F
Crank Handle 13.9mm	2004178	2004178	Handle for Universal with 13.9mm Pivot H-46"	258.75 / PC	21.87 / F
Crank Handle 13.9mm Aluminum	2004182	2004182	Handle for Universal with 13.9mm Pivot H-46"	258.75 / PC	21.87 / F
Crank Handle Hook	2001890		Crank Handle Hook	258.75 / PC	28.78 / F
Crank- Crome Winch (14cm)	143314-00	6c3.2129/80	Crank, Crome Winch (14cm)	9.10 / Piece	4.29 / Piece
Crank- Crome Winch (14cm) FL	143314-00	6c3.2129/80	Crank, Crome Winch (14cm)	9.10 / Piece	4.29 / Piece
Crank-Holder Clip	143105-00	6d3.2501	Crank- Holder Clip	0.66 / Piece	0.41 / Piece
Crank-Holder Clip FL	143105-00	6d3.2501	Crank- Holder Clip	0.66 / Piece	0.41 / Piece
Crank, Non detachable	143101-00	- - 013017001	Crank - Non detachable	52.72 / Piece	28.05 / Piece
Crank, Non detachable FL	143101-00	- - 013017001	Crank - Non detachable	52.72 / Piece	28.05 / Piece
Cross Cut Saw-Electronic Read Out	9508-ACCE-00-ST		Cross Cut Saw-Electronic Read Out	218.50 / PC	0.00 / F
Crown & Drive 60 mm oct. for ODS T20	15.176.406	15.176.406	Crown & Drive 60 mm oct. for ODS T20	115.00 / PC	2.88 / F
Crown & Drive 70 mm oct. for ODS T20	BM-EZ-CD-70-S		Crown & Drive 70 mm oct. for ODS T20	4.45 / PC	2.07 / F
crown + drive 60mm	202355-01		crown + drive 60mm	34.50 / Piece	23.00 / Piece
Crown 2.375	8223-ADAP-00-JX		Crown - 2.375" for LT50 / 500 Series Motors	115.00 / PC	1.43 / F
Crown 60mm axle	205200-14		Crown 60mm axle	10.00 / Piece	1.90 / Piece
crown 85er Butzbachaxle (60er Mot)	202200-60		crown 85er Butzbachaxle (60er Mot)	10.00 / Piece	2.67 / Piece
Crown and Drive Set 40 mm, oct.	161000-40	- 6061289	Crown and Drive Set for 40 mm oct. LT40 Series Motor	4.89 / Set	1.85 / S
Crown and Drive Set 40 mm, oct. FL	161000-40	- 6061289	Crown and Drive Set for 40 mm oct. LT40 Series Motor	4.89 / Set	1.85 / S
Crown and Drive Set 60 mm, oct.	161000-60	- 6061355	Crown and Drive Set for 60 mm oct. LT50 Series Motor	5.78 / Set	2.19 / S
Crown and Drive Set 60 mm, oct. FL	161000-60	- 6061355	Crown and Drive Set for 60 mm oct. LT50 Series Motor	5.78 / Set	2.19 / S
Crown and Drive Set 70 mm Octagonal LT50	161000-70	- 6061357	Crown and Drive Set for 70 mm oct. LT50 Series Motor	11.68 / Set	4.43 / S

2. Double click on the record in order to open the detail view.

3. Switch to the "Parameter" column.

In the "Classification" area, you will find a pop-up menu with the name "Directory". In this menu, all files that are in the product catalogue are listed.

4. Select "Product A" from the pop-up menu directory.

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File Edit Items Import/Export Print Print preview Windows Hilfe

Items detail view [Crank Handle 11.9 - 6406-HAND-02-AL]

Product texts
Parameter
Product picture
Accessories
own fields
File attachments
Stock monitor
Orderparameters
Cuttingoptimization
Prices
SP 1
SP 2
PP
Webshop
Categories
Webshop Sync. Log

Manufacturing
Item in part list
Item in packing list
Default measurement sheet

Item status
☒ Sales product ☒ Purchase order item ☐ Item disabled ☐ XML Supplier export
☐ Order filling ☐ Cuttingoptimization ☐ Multi suppliers ☐ Multi-lingual product

Rental/Serial numbers
☐ Rental product ☐ Serial number liability

Finance account
Proceeds account with s. ta
VAT rate
Proc. account with s. tax (abro.)
Cost centre

Classification
Directory
Supplier
Catalogue
Segment group
Commodity group
Product group
Price comparison group
Commission group

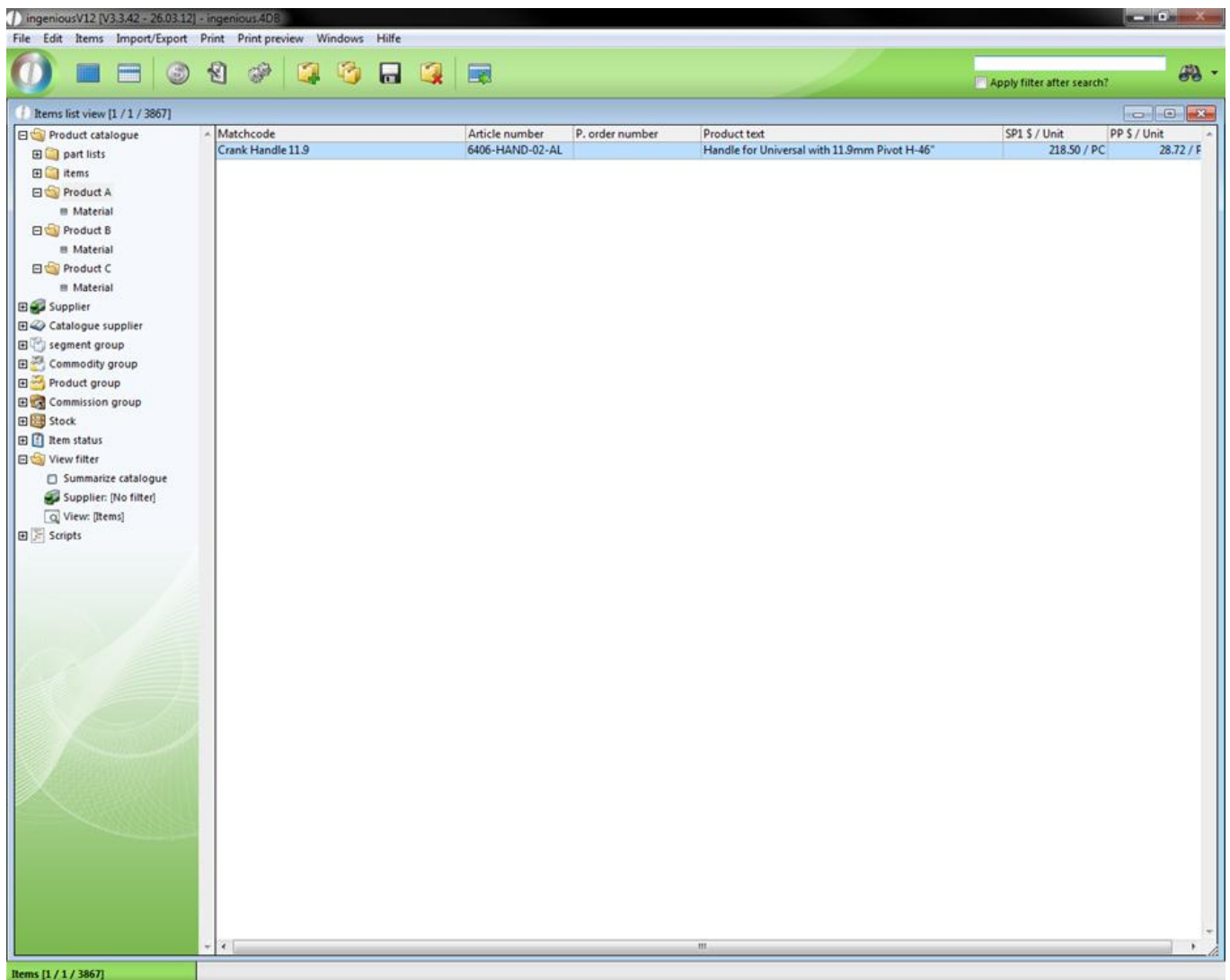
Global Program Settings
Consign. labels per item 0

Selection
Page

[Crank Handle 11.9] - [6406-HAND-02]

Now leave the item detail view and confirm with "Save now" in the window that appears. You have just incorporated a product into the product catalogue.

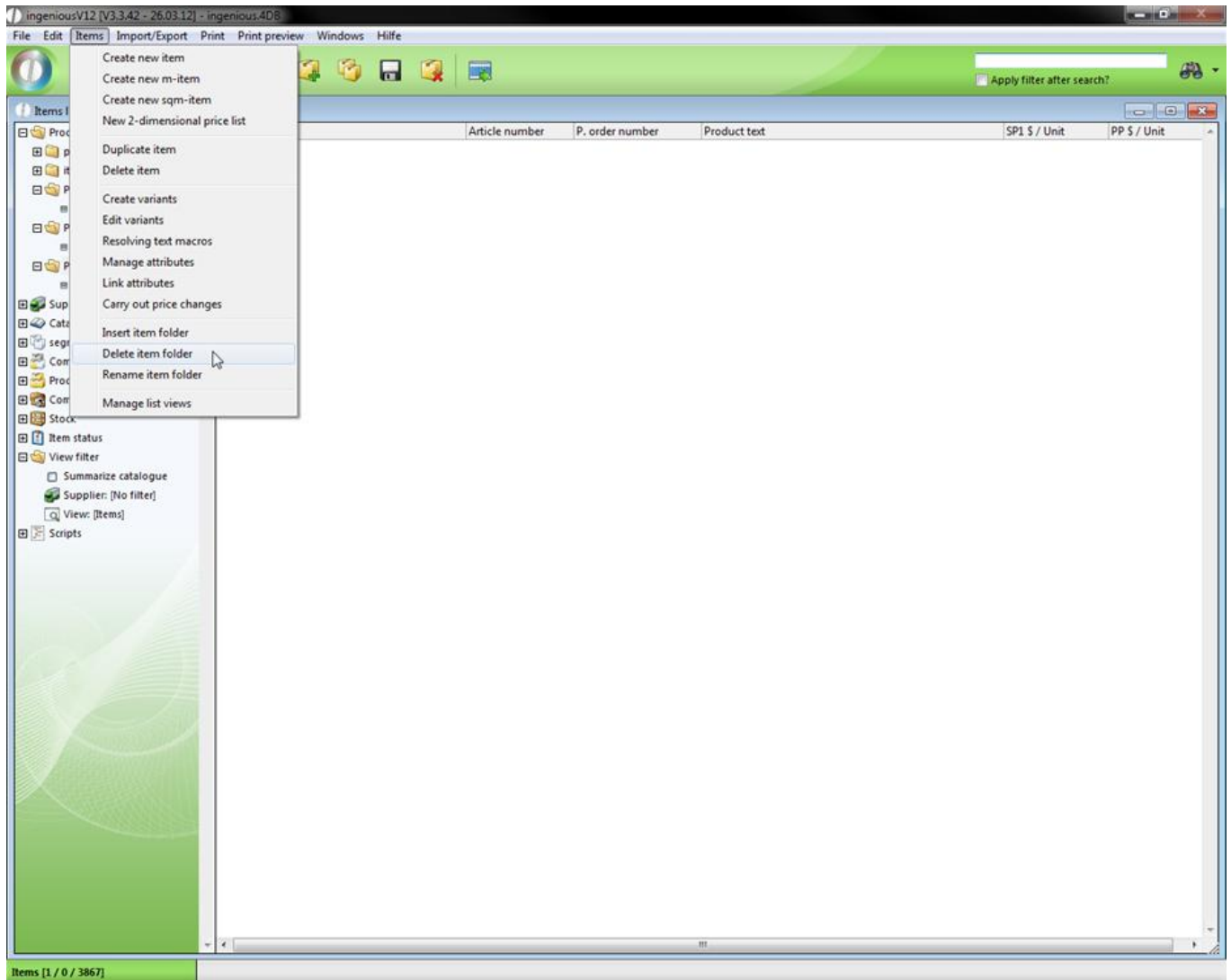
5. In order to test the action, simply open the file "Product A" in the product catalogue. There you will find our article with the article number "A50000003".



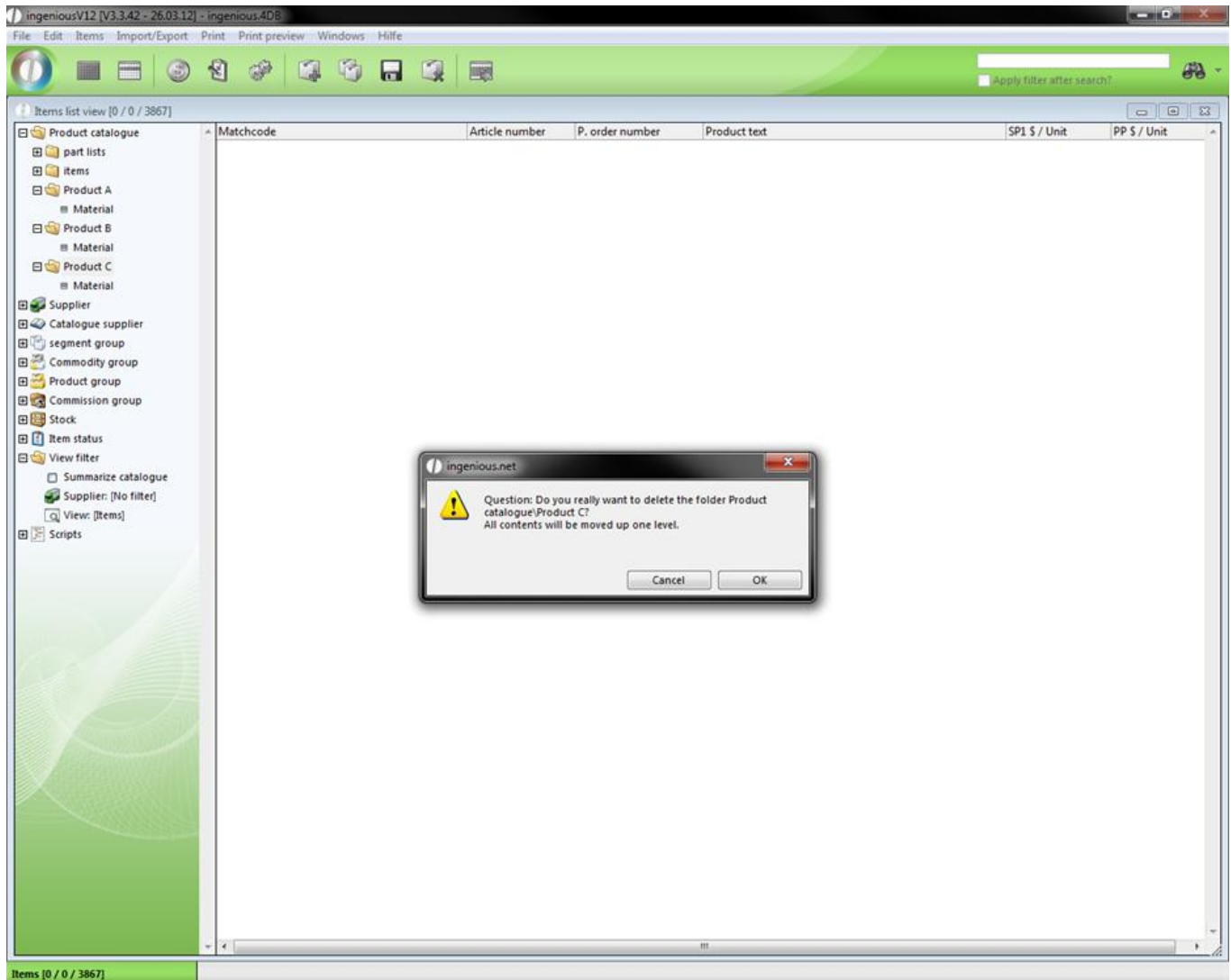
Note: The moving of products to the product catalogue functions analogously. Simply select another folder in the "Folder" popup menu of the article, select another folder and the article is moved.

Practice deleting item folders

1. In the product catalogue, highlight the folder "Product C/Material".
2. In the main menu, select "Items/Delete item folder".



3. An inquiry window appears to ask whether you want to really delete the folder. Confirm with "OK".



As you can see, the folder was deleted. Of course one can also remove several files at the same time. In addition, one simply selects a file from a higher level. Then the selected folder and the pertinent subfolder are deleted.

4. Mark the folder "Product B" and repeat step 2 and 3.

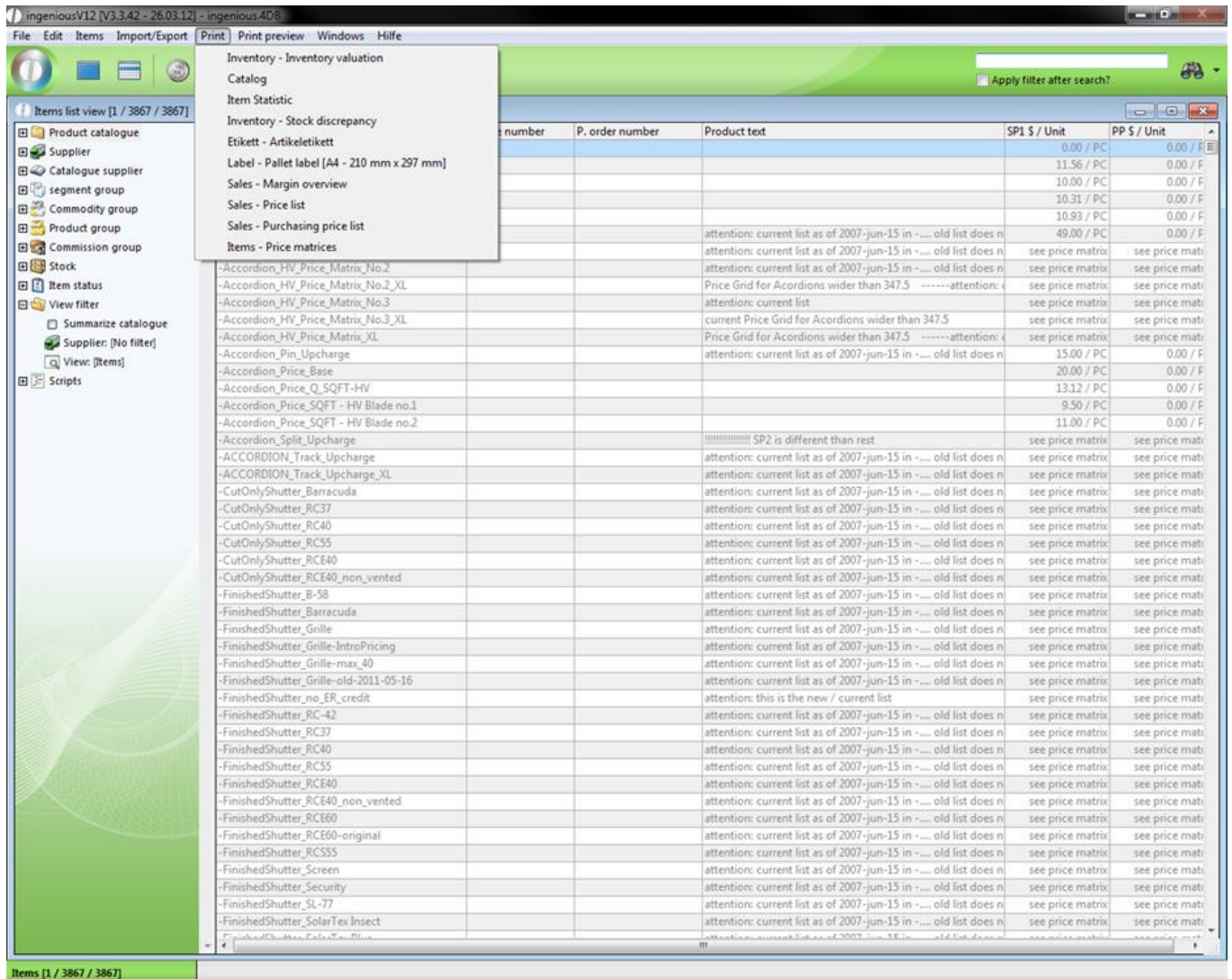
The folder "Product B" and the folder "Material" contained within are removed.

Presorting

The folders named Supplier, Catalogue supplier, Commodity group, Product group, etc. within the selection area serve as presorting of article records. In the "Supplier" folder, you will find for example, all your common suppliers in your database. If you select a supplier with a mouse-click, a product that you selected automatically appears in the list view. The folders named Commodity group, Product group, Stock, Item status and View filter have different presorting options that function analogously. You can set folder names in the program settings yourself.

3.2.1.3 Printing items list

Under the menu item "Print" in the main menu of Ingenious.V12, one finds different printing templates that are divided into different areas ("Inventory", "Item statistics", "Label", "Sales" and "Items").



The "Inventory" area contains the inventory stock of the items. There are two different printing templates.

Inventory - Inventory valuation

In the printing option "Inventory valuation", an evaluated inventory list that contains the following descriptions is printed:

- The item number
- The product description
- The hypothetical stock
- The actual stock
- The Purchase price
- The inventory value of an item
- The complete inventory value of all selected items.

Inventory - Stock discrepancy

On the other hand, the "Inventory" area contains the stock discrepancy ("Printing/Inventory – Inventory discrepancy"). These lists contain:

- The order number
- The matchcode
- The suppliers
- The inventory date
- The hypothetical stock
- The sales price
- The minimum stock
- The purchase order proposal
- The purchase price unit
- The respective items

Label - Item label

For the labeling of individual items, there is a print function available in Ingenious.V12 called "Item label" ("Printing/Label – Item Label"). It contains the following:

- Item number
- Inventory
- Commodity group
- Cost center
- Short text

of the item.

Label - Pallet label A4

For the fast identification of your pallets, the assignment of pallet inscriptions or pallet labels is absolutely necessary. For this reason, Ingenious.V12 also offers you a suitable print function. On the pallet label ("Printing/Label - Pallet label A4 "), the following data are about the item are contained.

- Item number
- Stock
- Commodity group
- Cost center
- Matchcode
- Date
- Quantity
- Product picture

The sales area covers 3 printing templates: The "Margin overview", the "Selling price list" as well as the "Purchasing price list".

Sales - Margin overview

The margin overview ("Print/Sales – Margin overview") contains the columns

- Item number
- Supplier
- Short text
- PP (Euro)
- SP (Euro)
- Margin (Euro)
- Margin (%)
- Stock
- PP/Unit

- Unit
- Value (Euro)

Sales - Price list

With the sales price list ("Printing/Sales – Price list"), you have all important sales item data to in "Black and White" in view. This list covers the following item data.

- Item number
- Matchcode
- Short text
- SP unit price

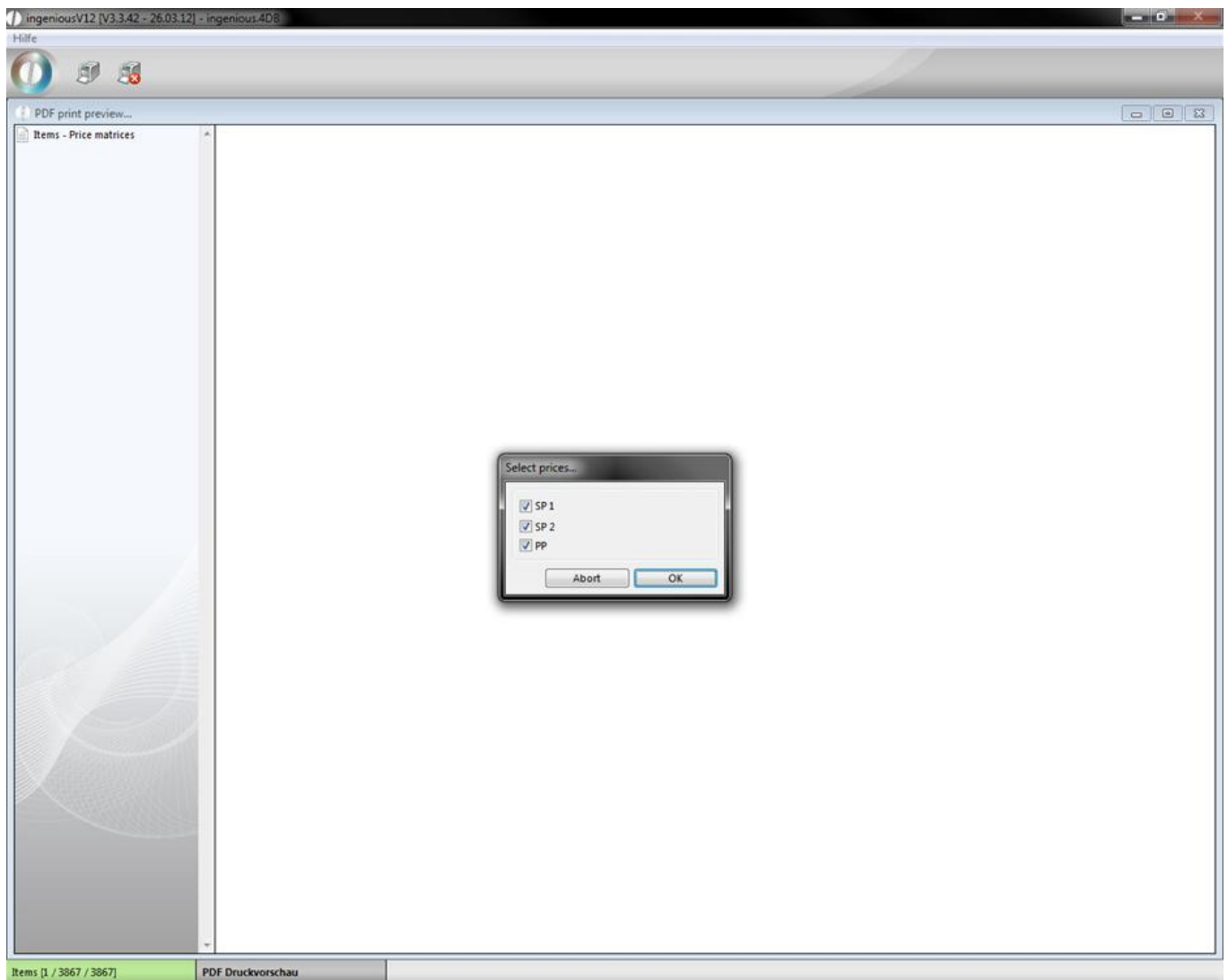
Sales - Purchasing price list

The sales price list ("Print/Sales - Purchasing price list") is almost identical to the sales price list. Instead of the column "SP unit price", you will find the column "Purchasing unit price".

- Item number
- Matchcode
- Short text
- PP unit price

Item - Price matrices

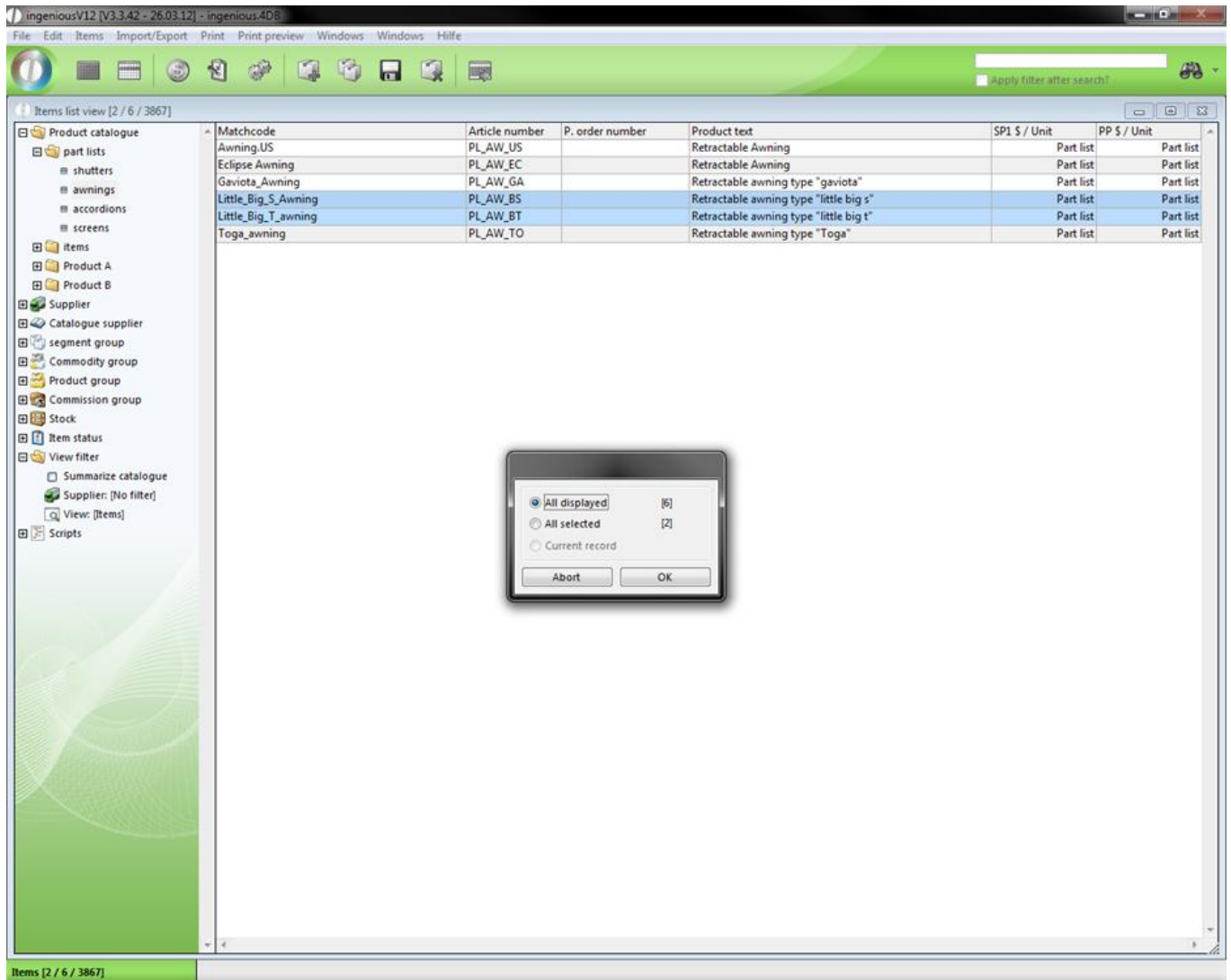
For the printing of two-dimensional price lists (i.e. width x height), the function "Items – Print price matrices" was developed. Here you can print your item price lists. You can thereby select which prices (PP, SP 1 or SP 2) are supposed to be indicated.



	A	B	C	D	E	F	G	H	I	J
37	204	1586.4	1671.6	1726.8	1831.2	2002.8	2067.6	-2.4		
38	216	1599.6	1687.2	1744.8	1854	2028	2095.2	-2.4		
39	228	1642.8	1736.4	1794	1906.8	2084.4	2154	-2.4		
40	240	1718.4	1814.4	1875.6	1990.8	2173.2	2244	-2.4		
41	252	2222.4	2346	2431.2	2440.8	2690.4	2782.8	-2.4		
42	264	2234.4	2361.6	2450.4	2614.8	2715.6	2809.2	-2.4		
43	276	2253.6	2383.2	2473.2	2642.4	2748	2844	-2.4		
44	9999	-2.4	-2.4	-2.4	-2.4	-2.4	-2.4	-2.4		
45	Price list [Accordion_HV_Price_Matrix]									
46	SP1:									
47		42	48.5	55	61.5	68	74.5	81	87.5	
48	18	196	218	240	262	284	306	328	351	
49	24	230	256	282	307	333	359	385	410	
50	30	265	294	324	353	382	412	441	470	
51	36	299	332	365	398	431	464	497	530	
52	42	334	371	407	444	480	517	554	590	
53	48	369	409	449	489	530	570	610	650	
54	54	403	447	491	535	579	622	666	710	
55	60	438	485	533	580	628	675	723	770	

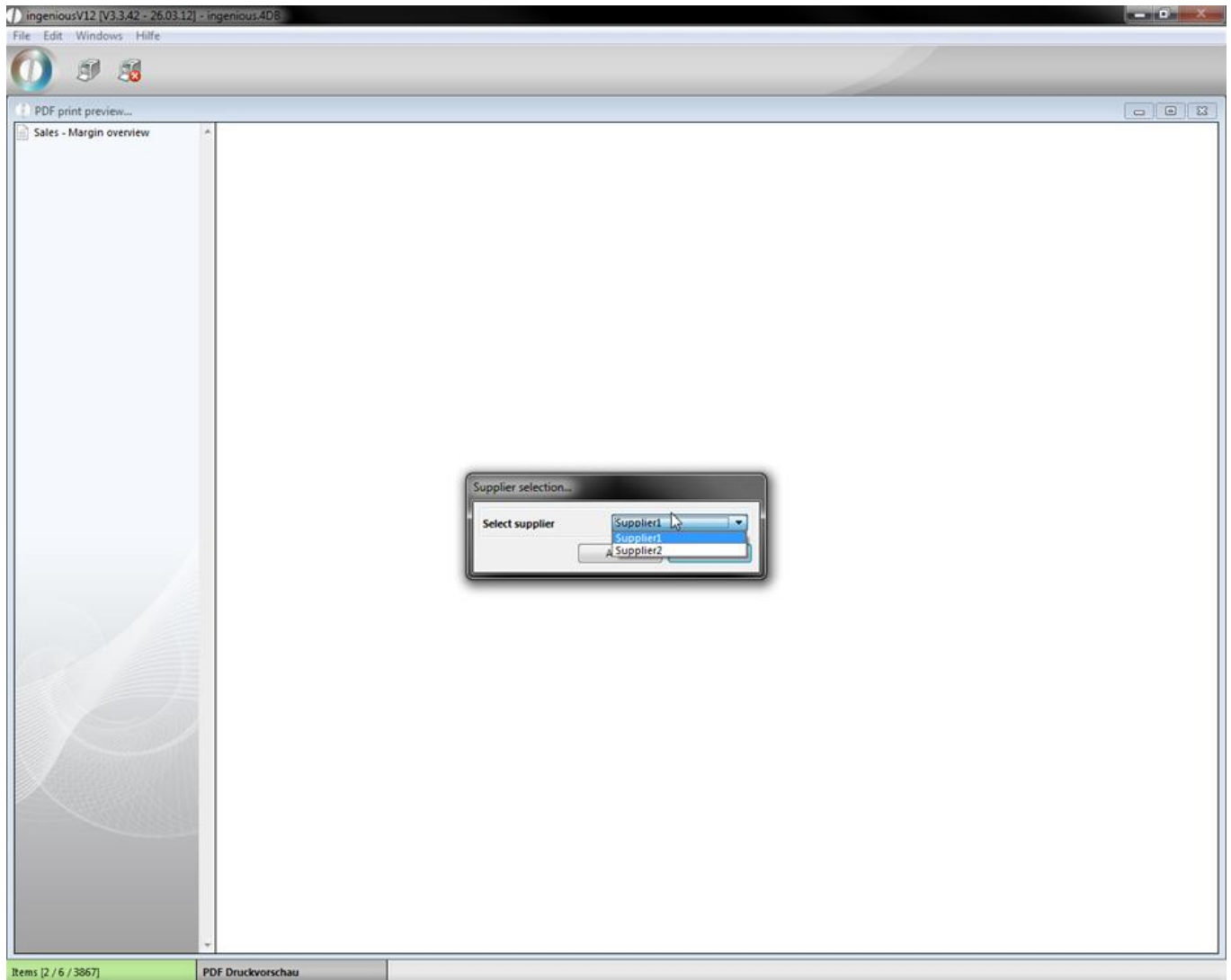
Practice printing lists

1. Open the desired files. In this example you should open the items in the folder "Awnings" of the product catalogue.
2. Select the print job "Sales - Margin overview" in the "Print" menu item.
3. A window appears to query further printing adjustments. Here select the options "All selected [6]" and "Show print preview" and confirm with the "OK" button.







If you mark the option, "Show print dialogs", the Windows standard window appears for the establishment of the print characteristics, such as the printing device, the paper size or the printing format, for example. If you do not select the option, the print job is sent to your standard printer and processed.


4. The window for the supplier selection follows. For this example, select the company "Supplier1".



Note: If your company manufactures items, you should also absolutely incorporate suppliers into your database.

5. Now the print preview appears. Here you have the printout in one view.


If your print job covers several sides, you can navigate with the  and  buttons. With the  button, you can somewhat increase the view of the page in order to also recognize the details. The  button is used to abort the print job. If you use this, the window will close and the printing job is canceled.

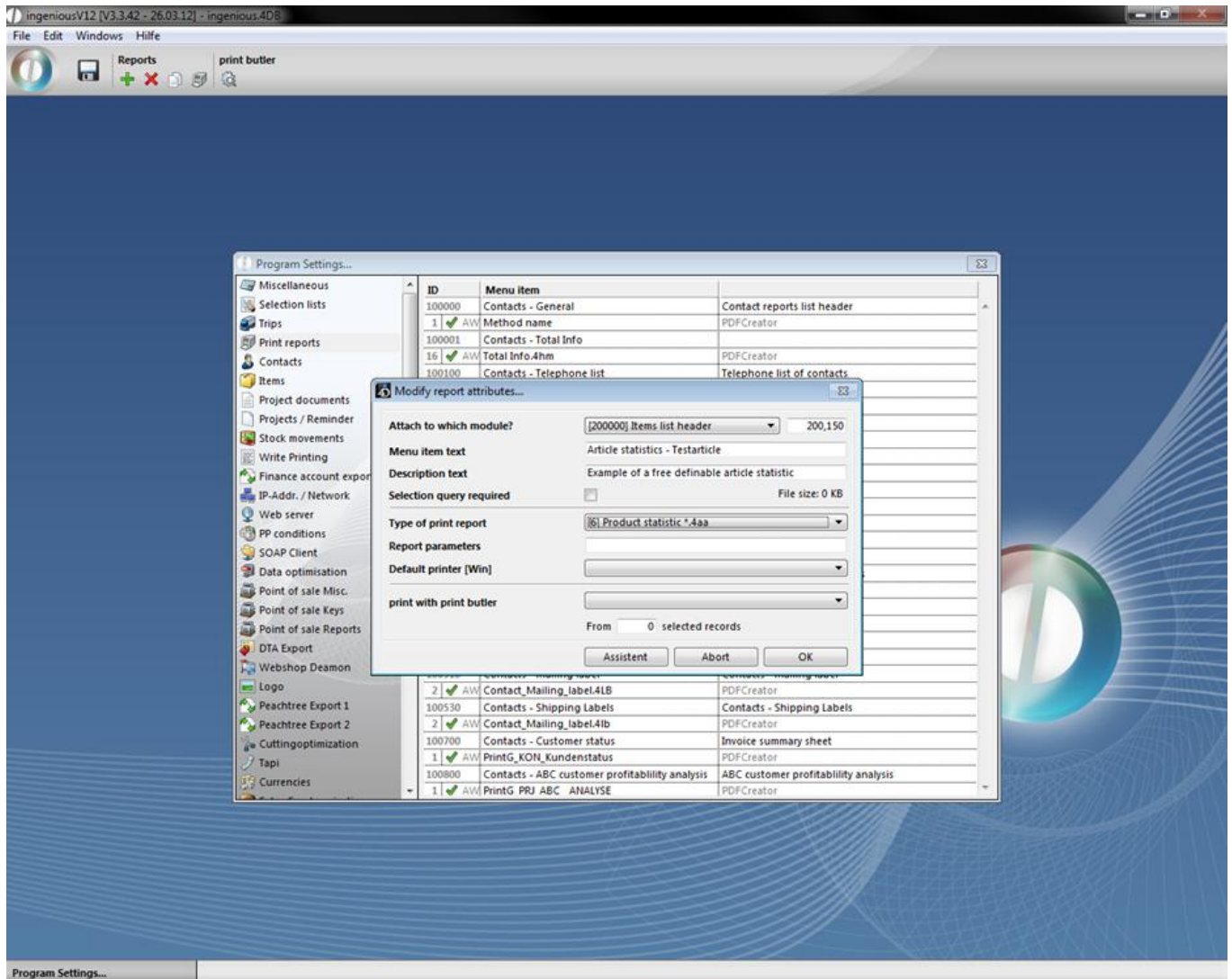
6. Click on the  button to start printing.

Product statistics

The item statistics is a new function added to Ingenious.V12. With its assistance, a quicker overview and detailed evaluations of an item or a group of items during a certain time period are possible.

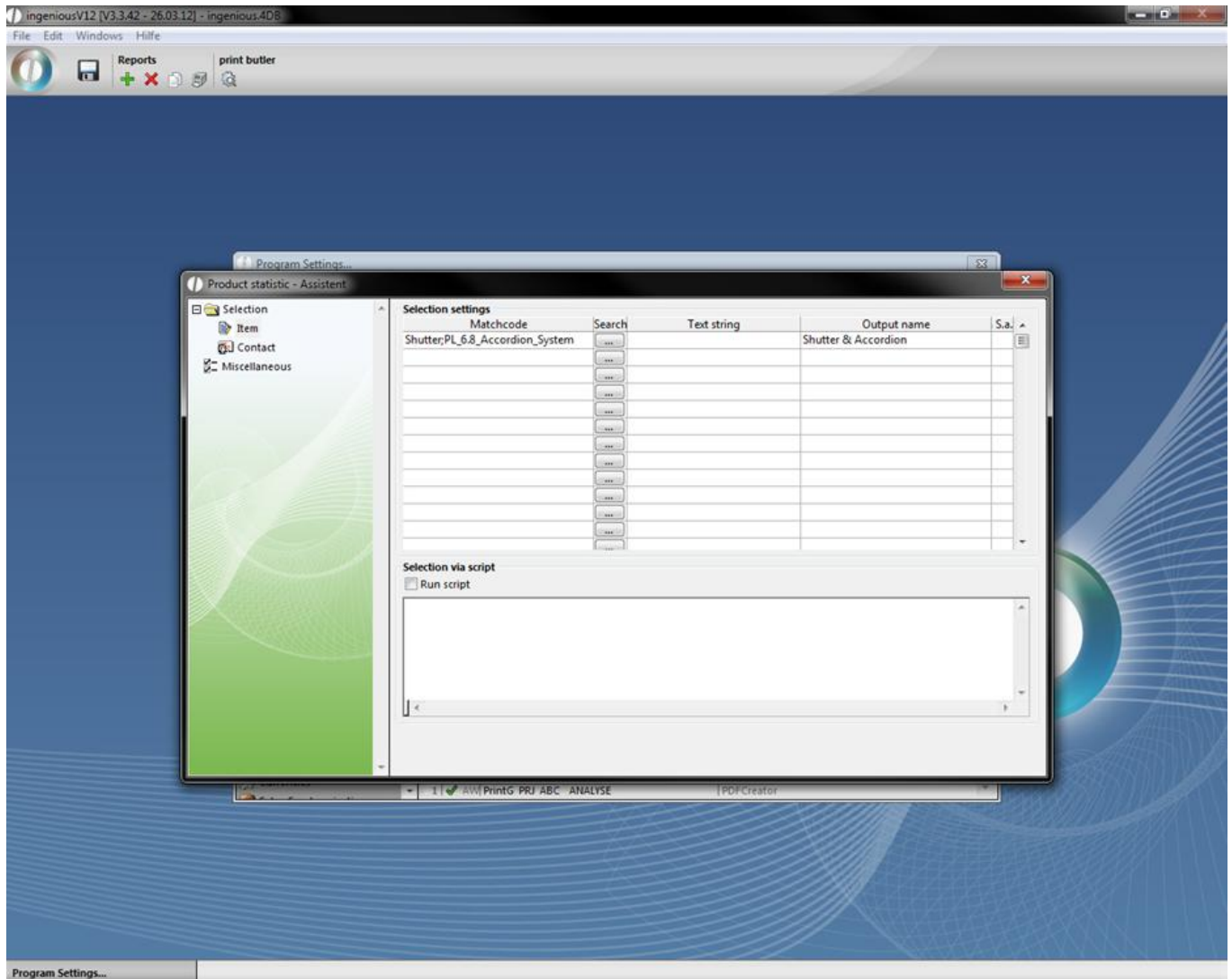
Creation of an product statistic

In order to create an item statistic, open the "Printing reports" column in the "Program settings" administrative tool. There you create a new report with the  button.



Window for creating a new statistic

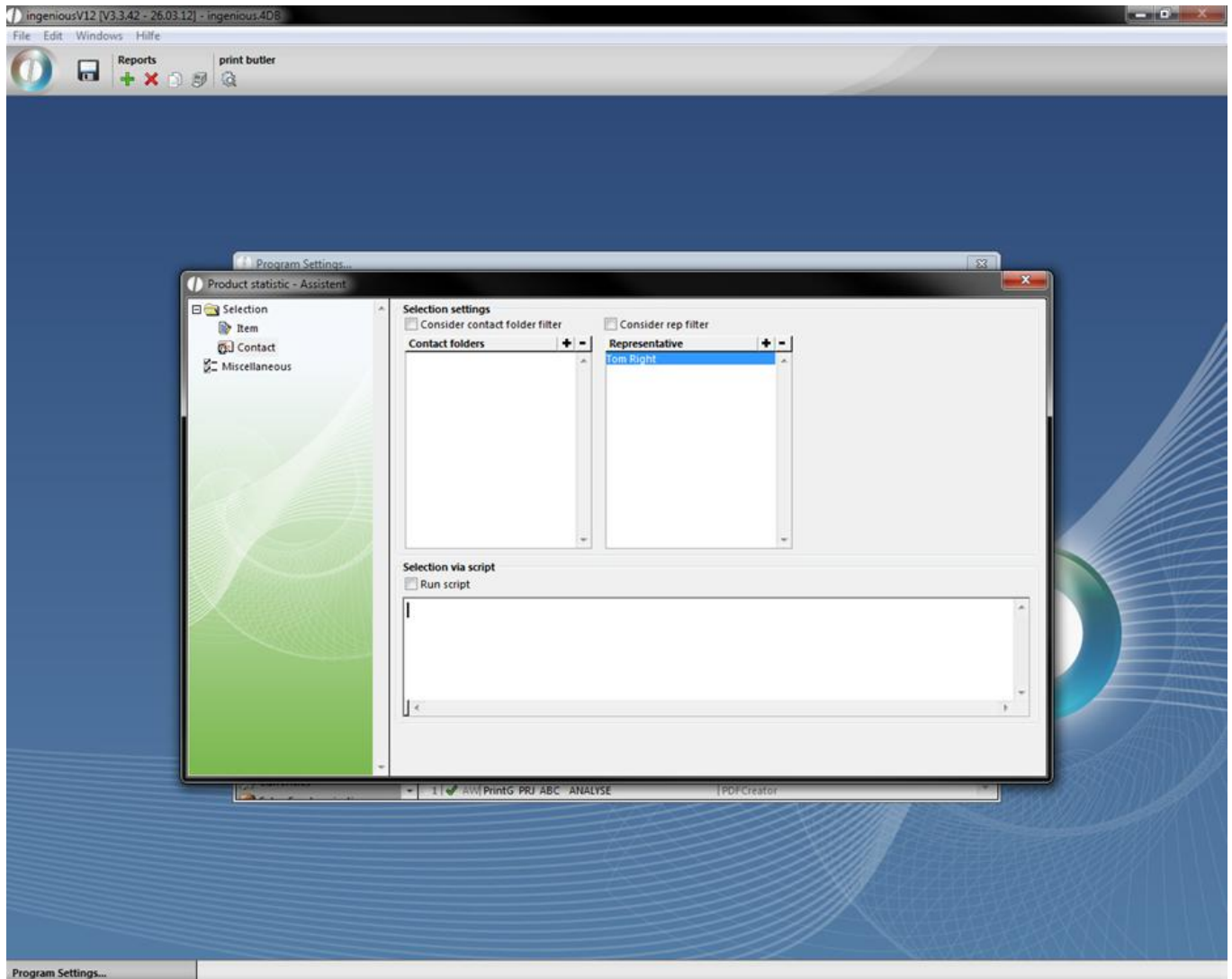
In the field, "Attach to which module?", you determine from which module the statistics should be made available. After you have filled out the remaining empty fields and have selected the options "Product statistics *.4aa" in the "Type of print report", open the assistants with the **Assistent** button. The assistant covers the 3 columns "Position", "Contact" and "General". With their help, you have the possibility of specifying all criteria of the statistics. In the selection settings of the "Position" area, the items, across which the statistics should be conducted, should be given with the actual matchcode and the individual description of the printout. In order to add an item, click on the **...** button and enter the Matchcode directly. If several items are to be specified under a general/summarized name in the statistics, you can insert them successively and separately by a semicolon into one line.



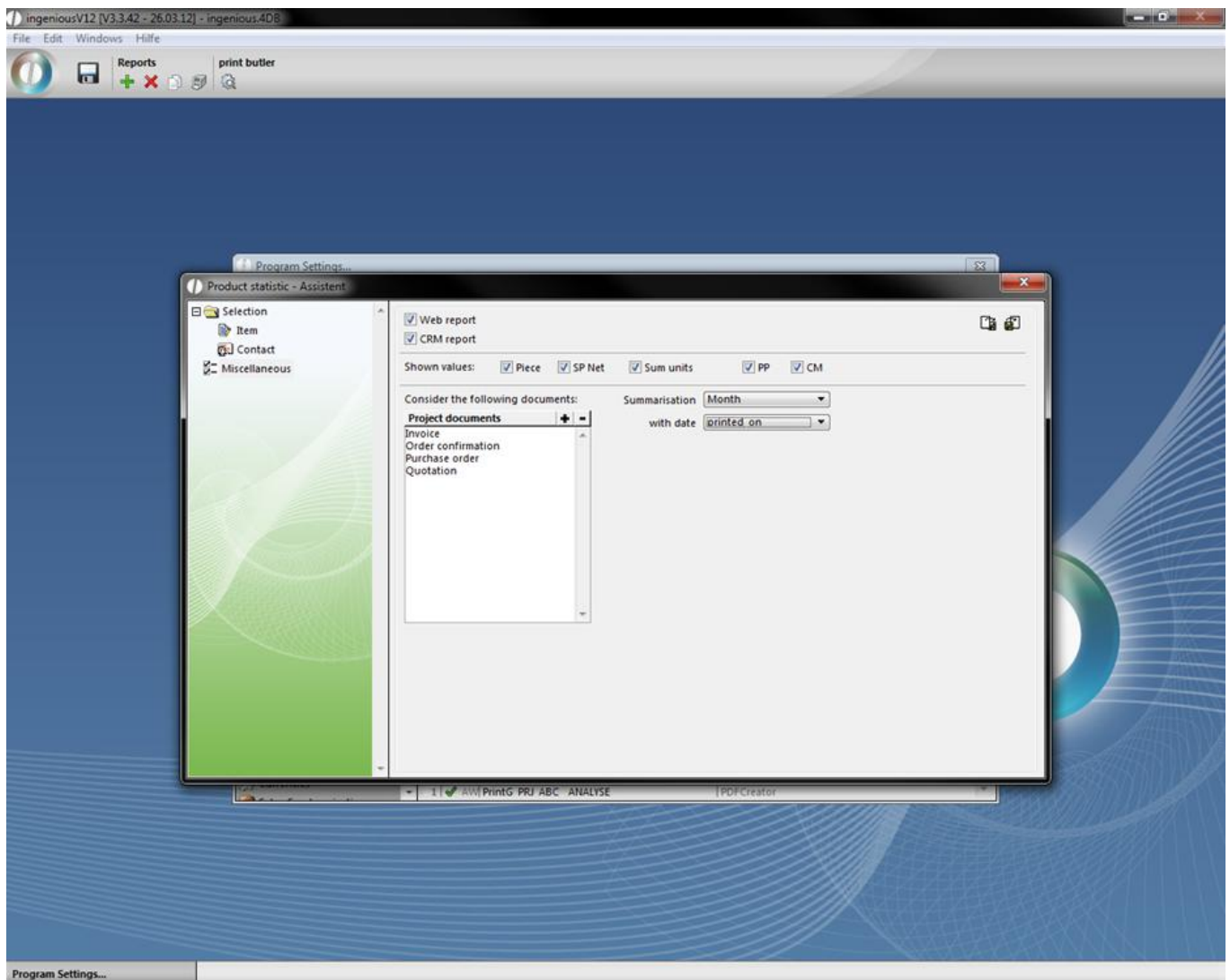
With the line "Text string", the statistics result can be further refined. For example, there could be a parts list in the product catalogue called "Roller shutter AutoM4". This roller shutter can be purchased in various materials and color variations. If only black roller shutters are to be used in a statistic, then "Black" is written in the field, "Text string". Thus Ingenious.V12 filters all roller shutters "Roller shutter AutoM4" with other colors from the statistics.

With the column "S.a.", you also have the possibility of refining the statistics even further. Click on a cell in the column and a "Yes" automatically appears. When repeating this, the cell is empty again. If "Yes" is listed in the cell, then the items are not only taken into the statistics if they are individually sold, but also if they are part of a larger product (and specified in their parts list). This is seen for example with the electric motor of the roller shutter "Roller shutter AutoM4". All electric motors that were sold either individually, as spare parts for example, or as a component of a roller shutter, are thus now included in the statistics.

In the "Contact" column, representatives and contacts can also be selected. If you would only like to have items that are sold by a certain representative or by a certain contact in the statistics for example, then you have the possibility to do so here.



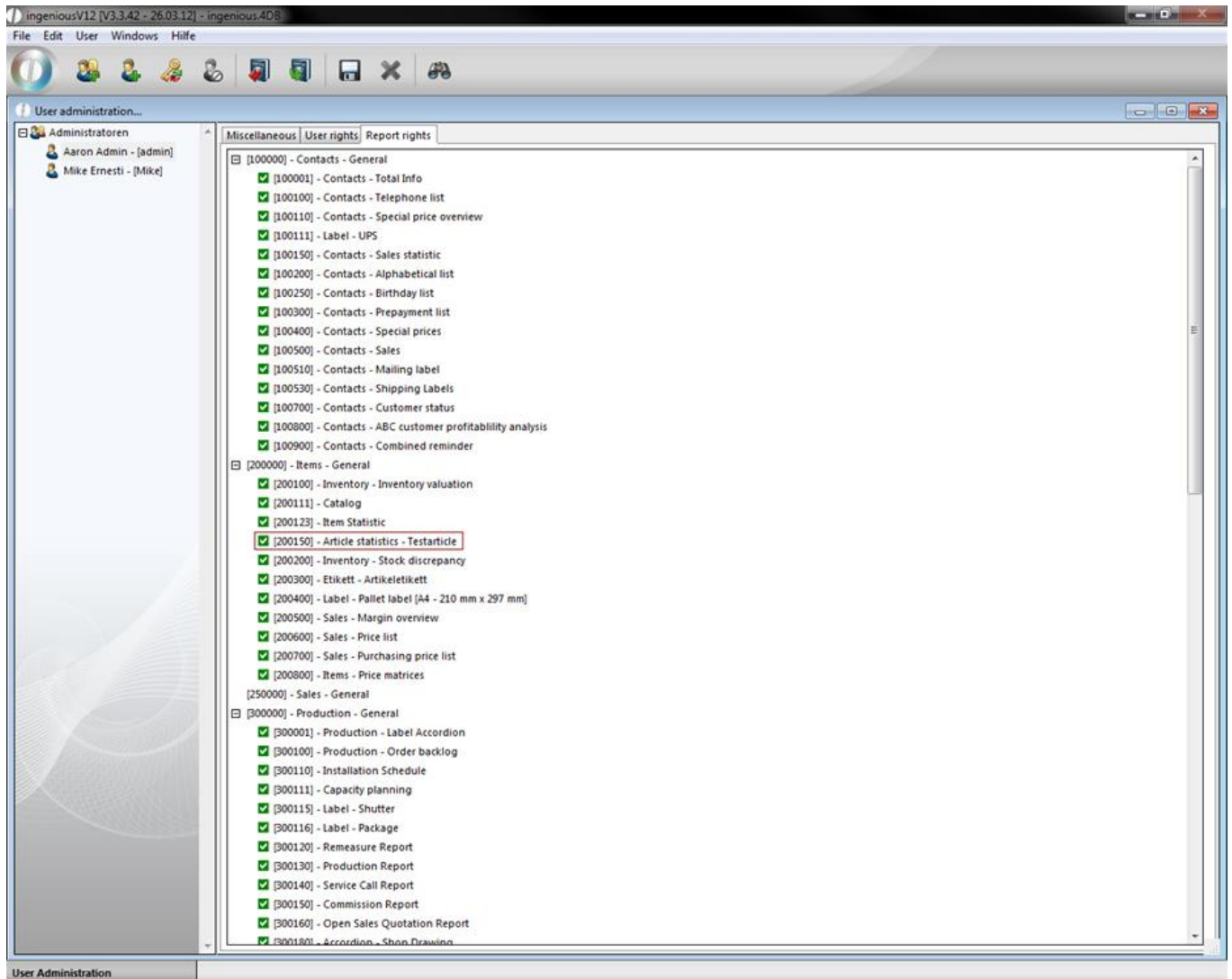
Under "General" the availability, layout and sources of the statistics are determined. If access to this statistic is to be permitted by the representatives outside of the company network, thus by Web access, you can determine this with a checkmark next to "WEB report". A checkmark next to "CRM report" is set up so that you can show a contact-specific item statistic in the column "CRM Information" in the contacts detail view. To which module the statistics is to be attached is determined by you in the field "Attach to which module?" of the window "Report characteristics". You can determine the layout to the extent that you have the choice between the values to be analyzed: "Piece", "SP Net", "Sum units", "PP", and "CM". In addition, in the selection field, "Summarisation", you can determine the time period of the statistics in three stages: "WK" (= calendar week), "Month" and "Entire FY". In the "Project documents" field, you specify in which type of documents (in their positions), items belonging to the statistics is to be searched.



When you have updated all of the settings, you can close the “Item Statistics - Assistant” window and work on the “Report characteristics” window and confirm it with “OK”. Subsequently, the program settings will also be closed. Do not forget to save the settings.

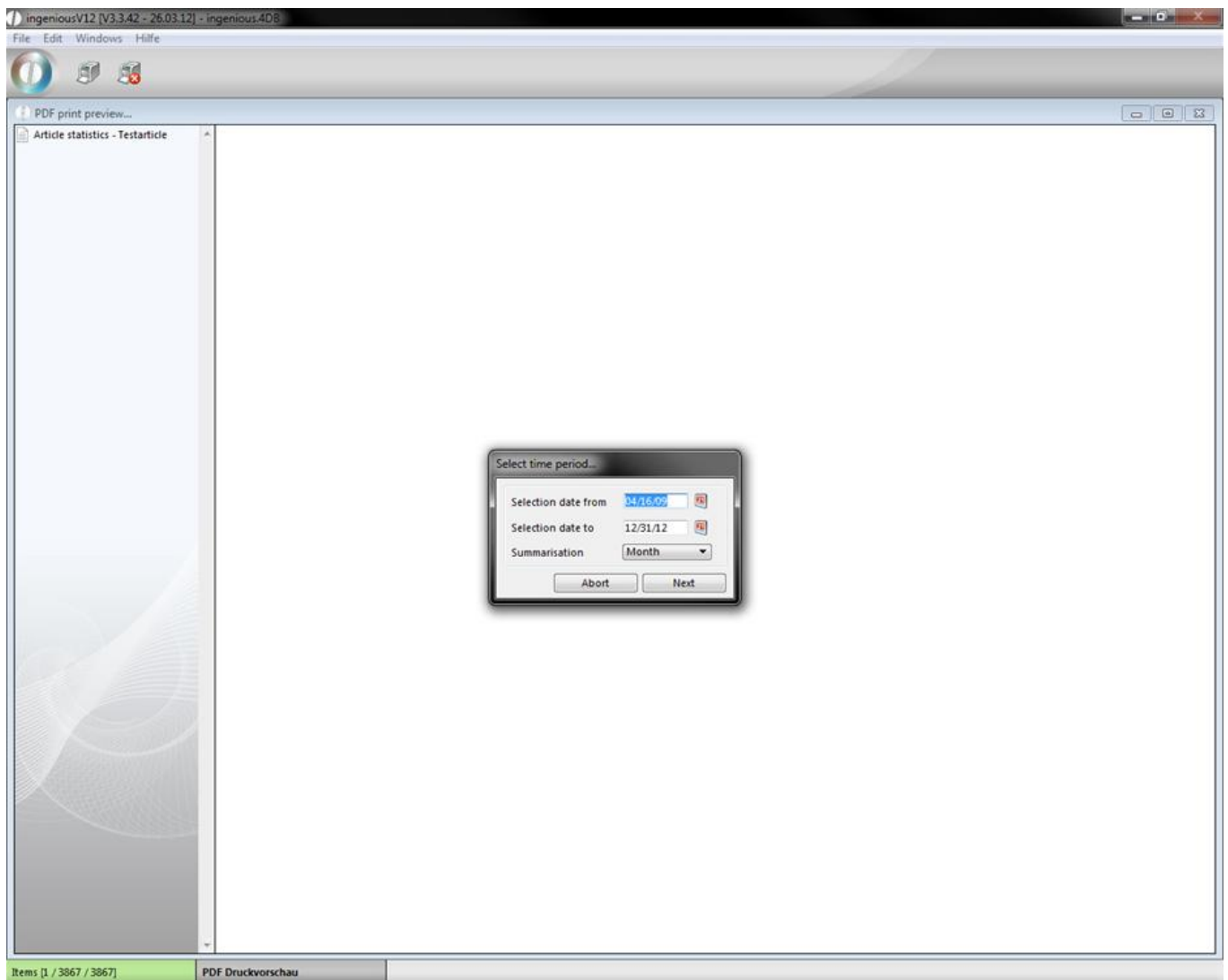
Application of product statistics

In order to be able to use the statistics, you need the corresponding report rights, which you can work on in the user administration. Here the statistics just provided are by default refused to each user.



In order to be able to use the statistics, one must double click on the red cross to activate and give oneself the right. If you now open the module "Items" again, you will find the statistics under the menu item, "Print/Item statistics – Test items".

After you have started the statistics with the appropriate menu option, an inquiry window appears to specify the time period. Enter the desired data either directly with the keyboard into the corresponding field, or use the calendar button to update entries with the mouse.




If you confirm the time period with the button, Ingenious.V12 immediately begins with the processing of the data. This trial process is shown to you with the appropriate window. As soon as Ingenious.V12 terminates the processing, the statistics appears on the monitor.

The screenshot shows the 'Product analysis...' window in the ingenious.V12 software. The window has a menu bar (File, Edit, View, Insert, Style, Tools, Database) and a toolbar. The main area displays a table with the following data:

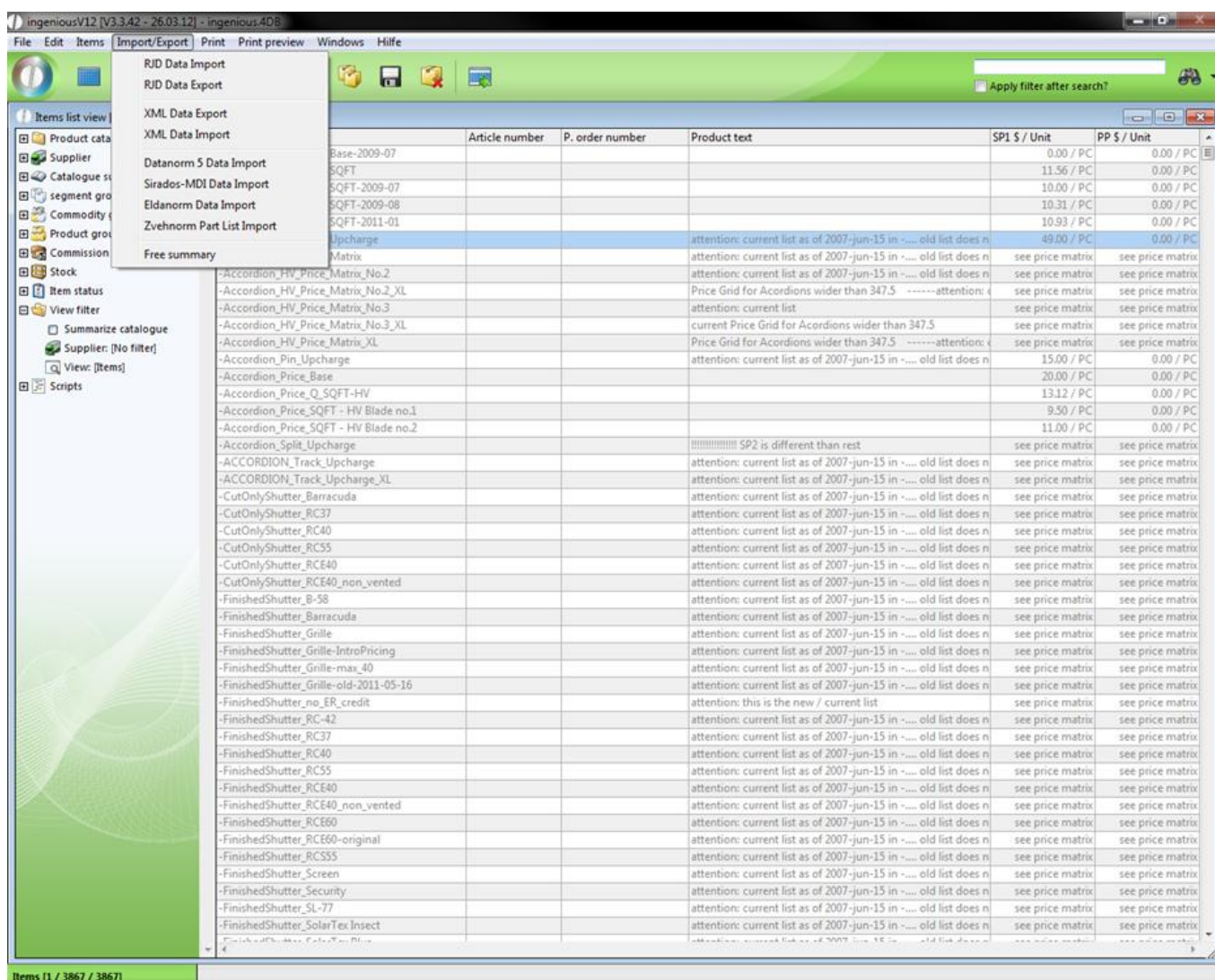
Name	Data	04/2009	05/2009	06/2009	07/2009	08/2009	09/2009	10/2009	11/2009	12/2009
1	Monthly product statistic from 4/1/2009 till 5/1/2013									
2	Name	04/2009	05/2009	06/2009	07/2009	08/2009	09/2009	10/2009	11/2009	12/2009
3	Shutter & Accordion									
4	Piece	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5	Sum of units ()	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6	PP	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7	SP	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8	CM [%]	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The status bar at the bottom indicates 'Items [1 / 3867 / 3867]'.

In the item statistics just provided, you can follow the monthly graduated sales process (Piece, PP, SP, CM) of the appropriate items. A printout of the statistics is possible by using the menu option, "File/Print Document..." or by clicking on the  button.

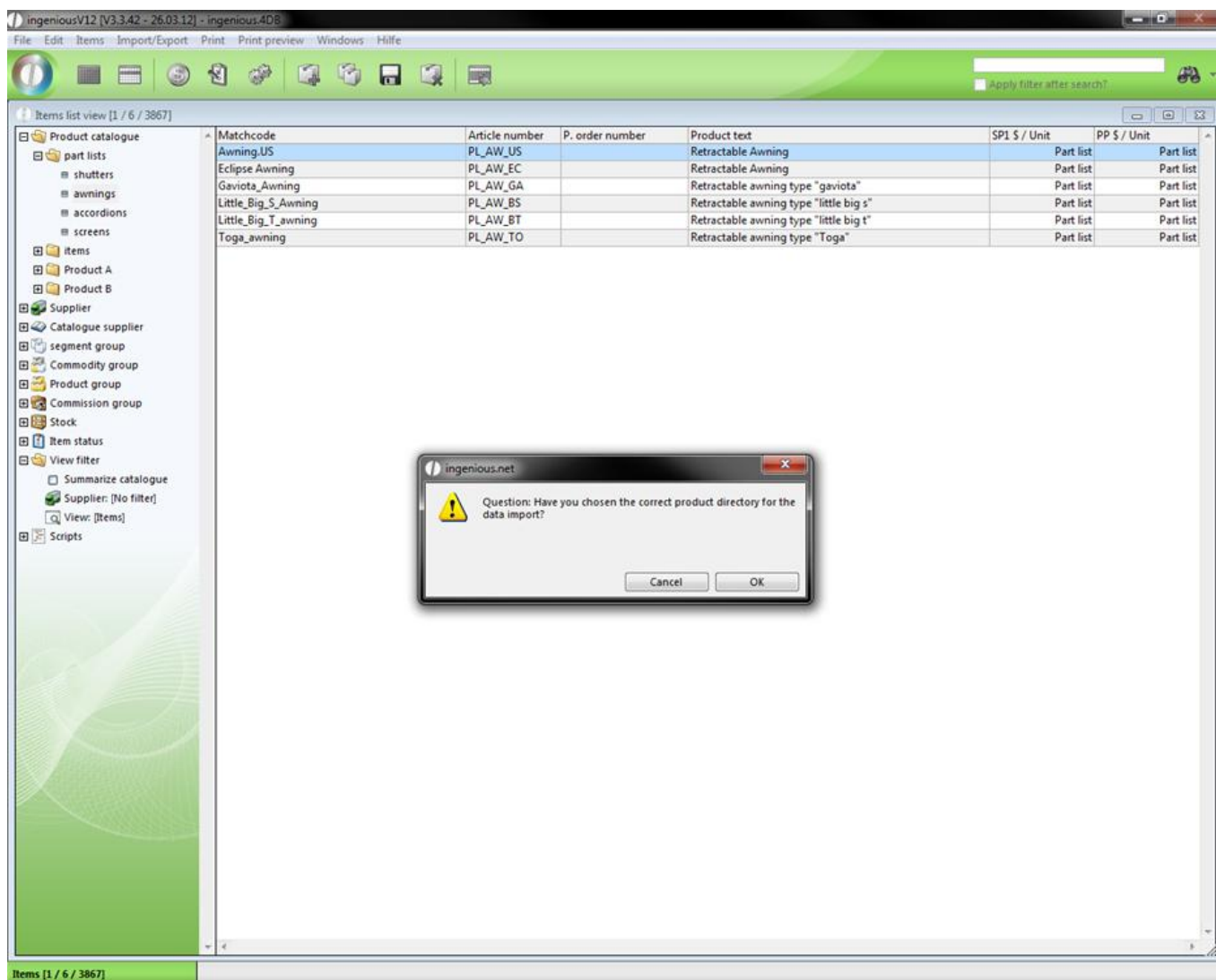
3.2.1.4 Import and export of items

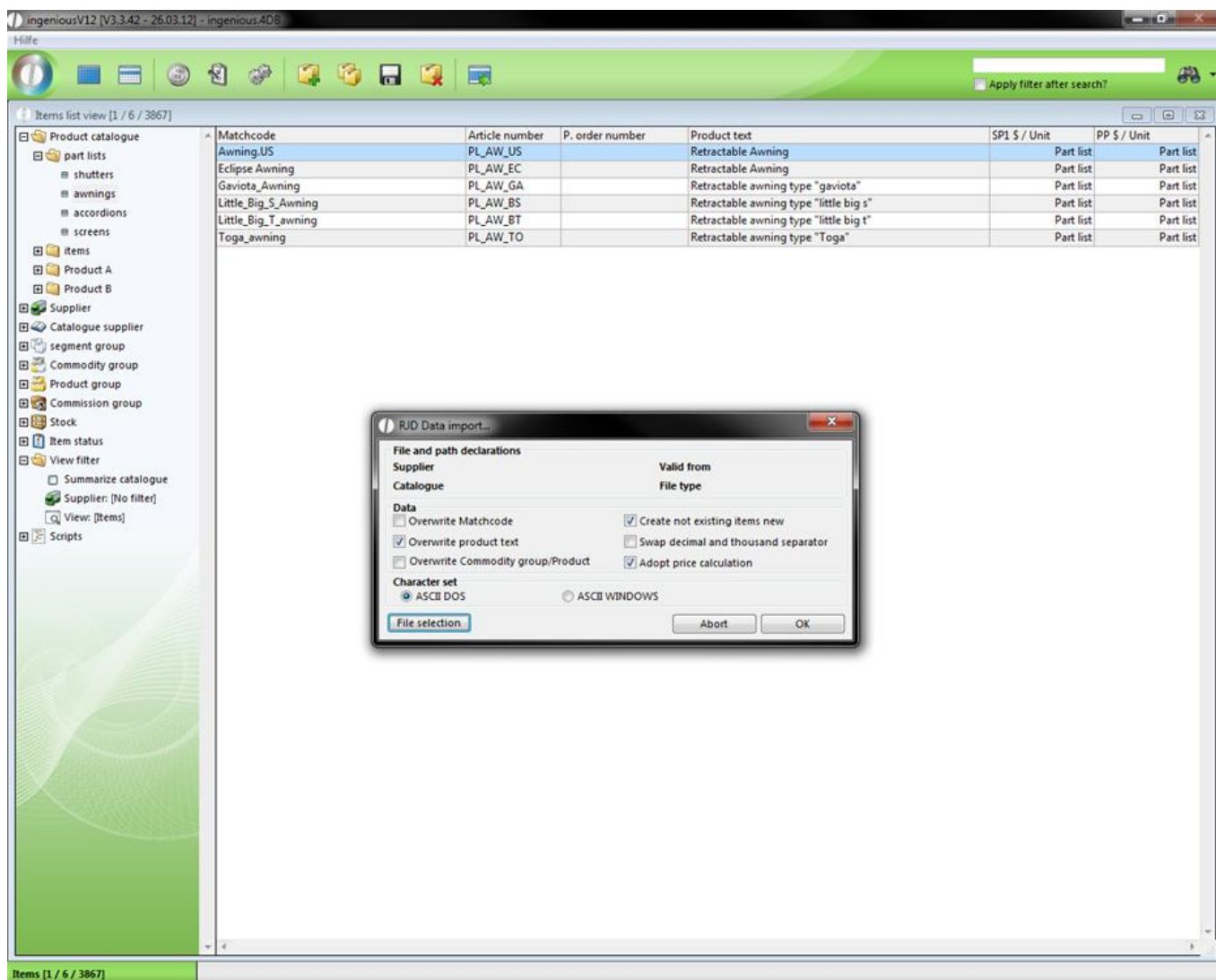
In Ingenious.V12 you have different possibilities for importing and exporting data. You will find this in the main menu of the item module under the item "Import/Export".



RJD Data Import

RJD is the data exchange standard of the roller shutter and Venetian blinds industry. This standard simplifies the data exchange between supplier and manufacturer and your company. You can easily import item data from the manufacturer without having to create the data again yourself. If you want to have such data and include it in your database, Ingenious.V12 puts a reliable RJD Data Import function at your disposal. You will find these under the menu option "Import/Export/RJD Data Import" of the main menu. First, the following reference display window appears.

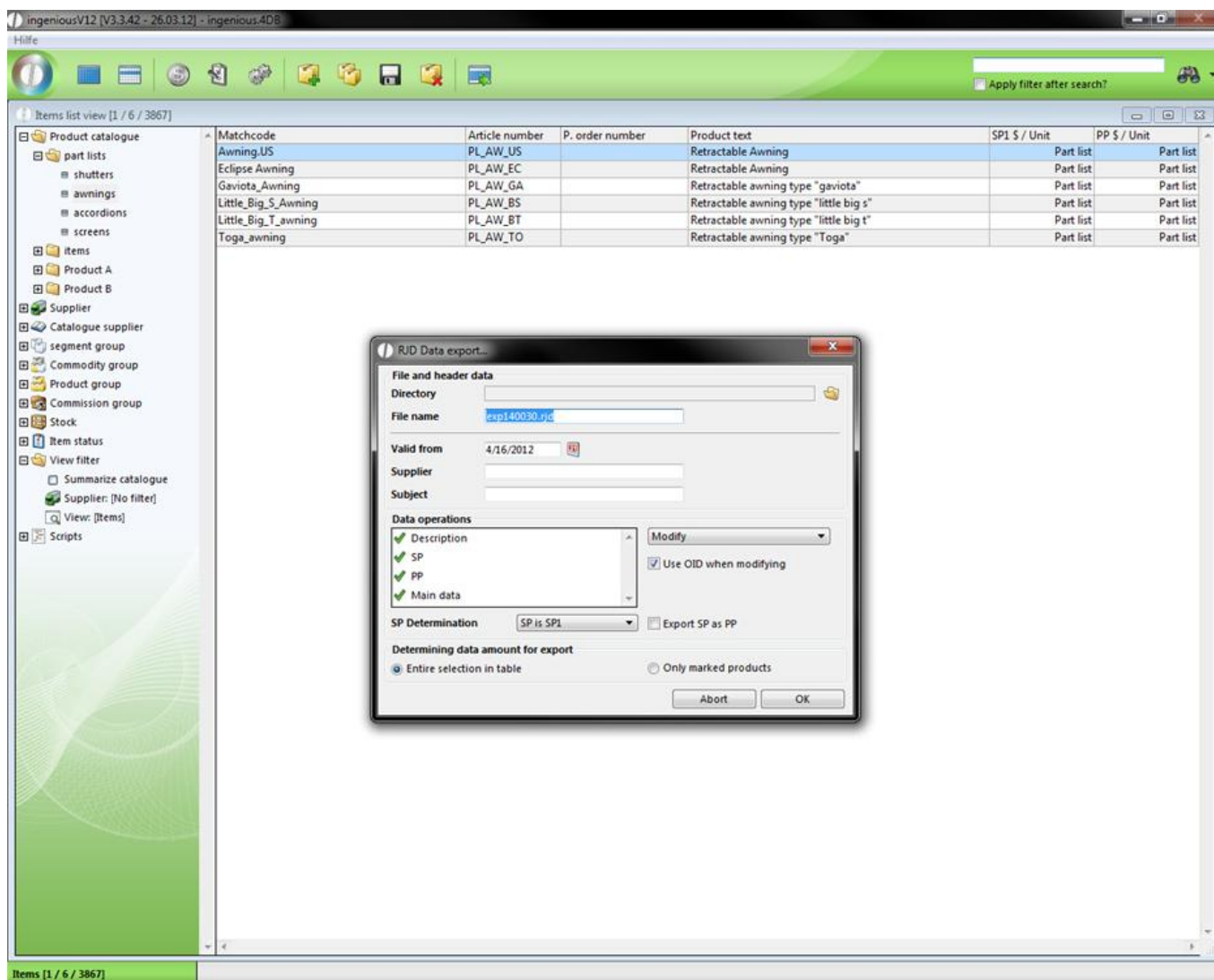




Main menu of the RJD Import function

RJD Data Export

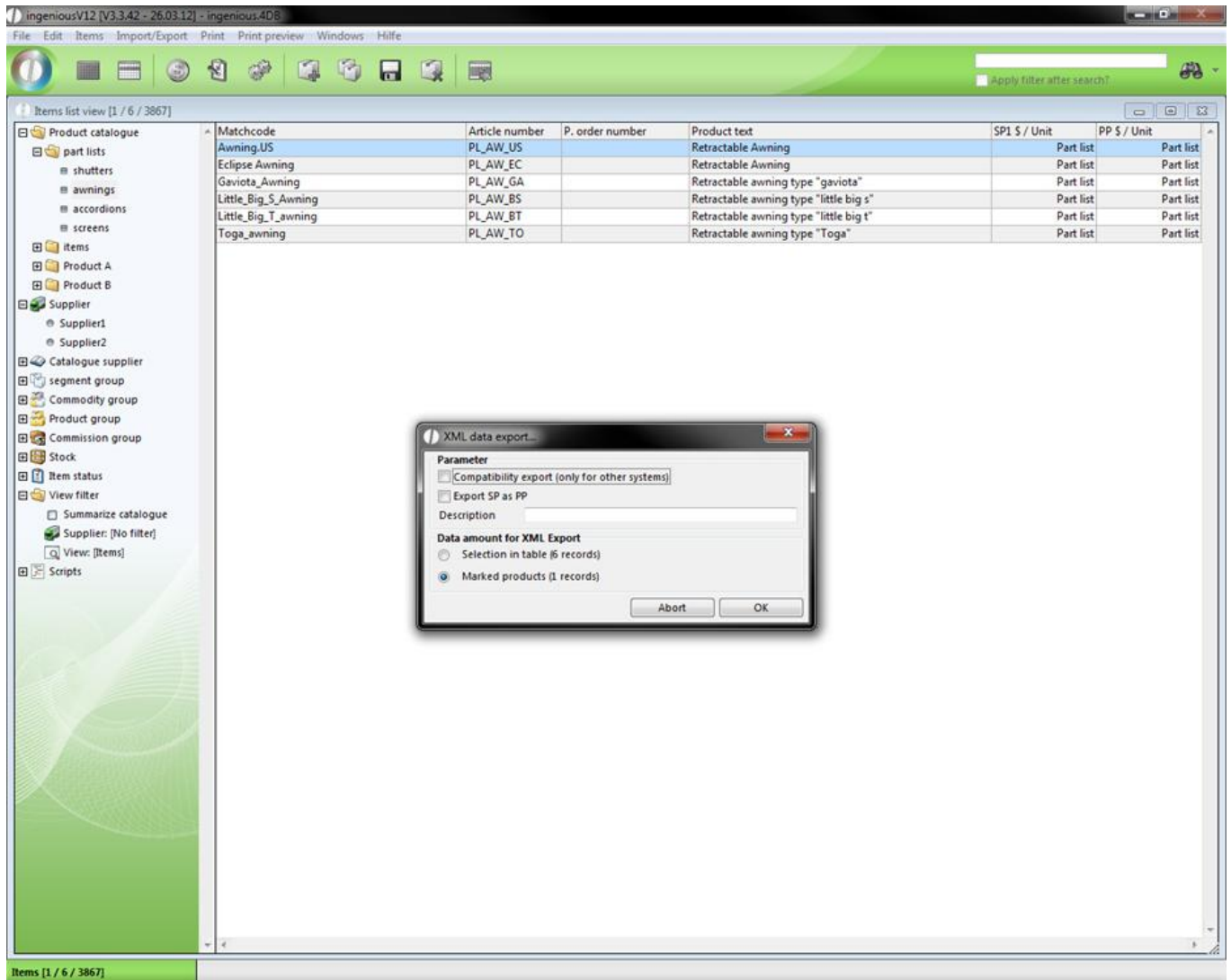
If you want to provide RJD Data yourself and make it available to other people (Interested parties, contacts), the RJD Data Export function in Ingenious.V12 can help you. This is found in the main menu under the entry "Import/Export/RJD Data Export".



Main menu of the RJD Export function

XML Data Export

If you click on the XML Data Export on the new sub item, "XML Data Export" a dialog window opens. Here you can activate the parameter "Compatibility Export", which makes a reading of the XML document into another software program possible. In addition, if item data are handed over to retailers, SP prices can be transferred as PP prices for example.



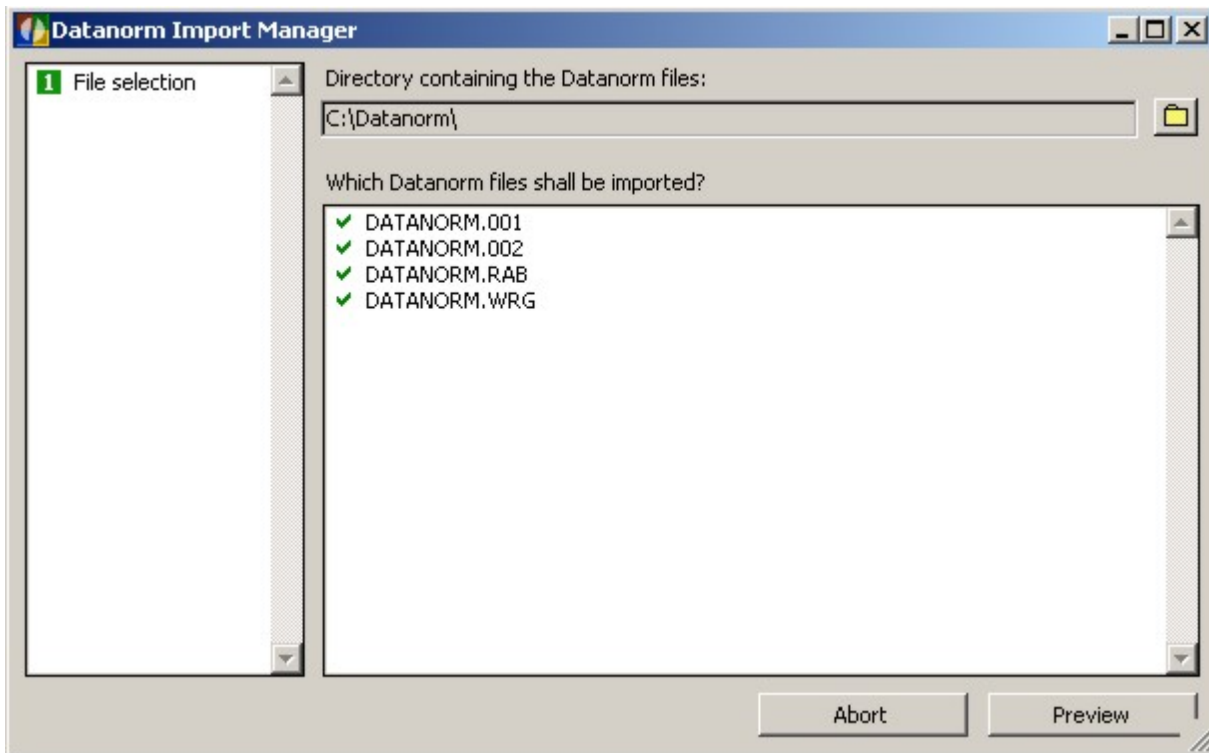
After the confirmation, a standard dialog window from Windows appears in order to save files. You can now select the desired path and designate the file and then data are stored as an XML file.

XML Data Import

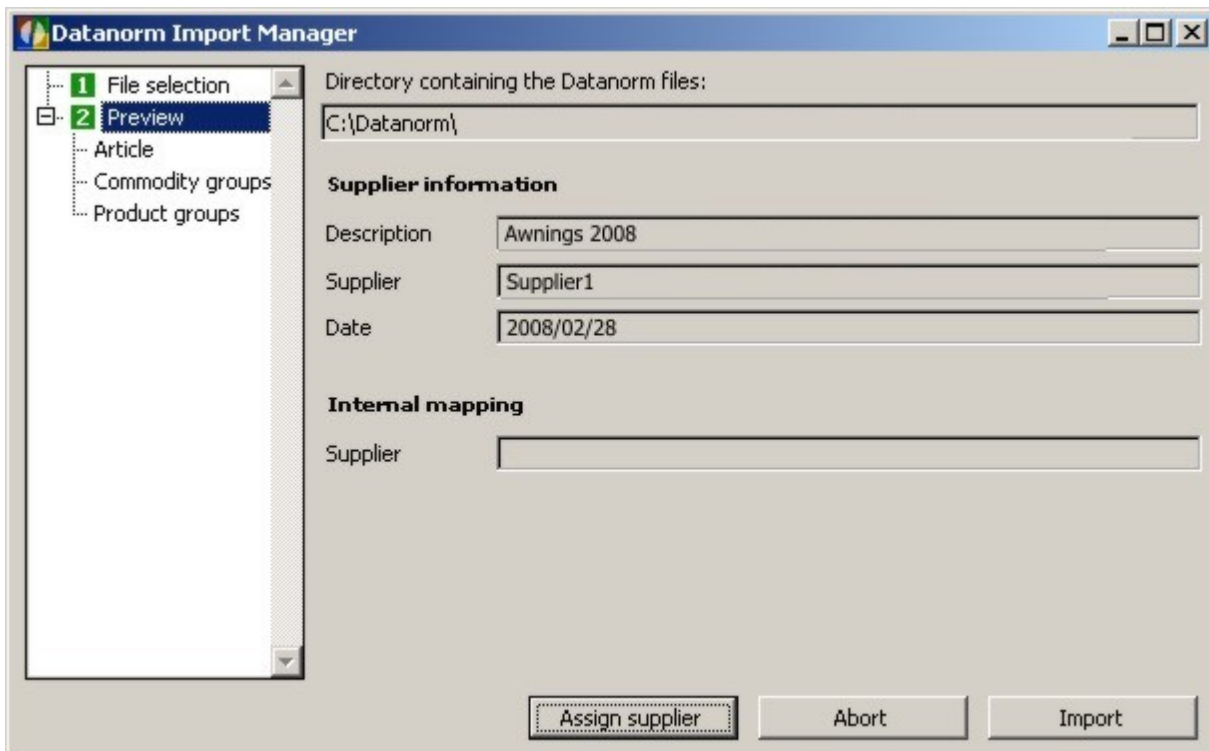
Before you start the XML Data Import, you should have only marked the desired item listing. In the standard dialog of Windows you then only select the file that you want to import.

Data Standard 5 Data Import, Sirados-MDI Data Import, Eldanorm Data Import and Zvehnorm Data Import

The Data Standard 5 Data Import functions, Sirados MDI Data Import, Eldanorm Data Import and Zvehnorm Data Import of ingenious.V12 represent interfaces for a simple item exchange between the specialized wholesaler, the manufacturers and the assembly trade. Thanks to the interfaces, trade enterprises can quickly and easily transfer many supplier product catalogues to ingenious.V12. The items can contain a variety of information such as descriptions, pictures or complex parts lists. They are automatically arranged during the import in the product and commodity, and provided with personal discounts. The Data Standard Import function is the most common data communication mode. It saves the tedious work of creating all items manually. When you open the function, the following window opens, in which you only select the listing with the Data Standard Files in the top section.



The import manager now automatically provides you with a list of the possible import files and you can select the desired files by double-clicking. Now you still assign the suppliers and import the file.

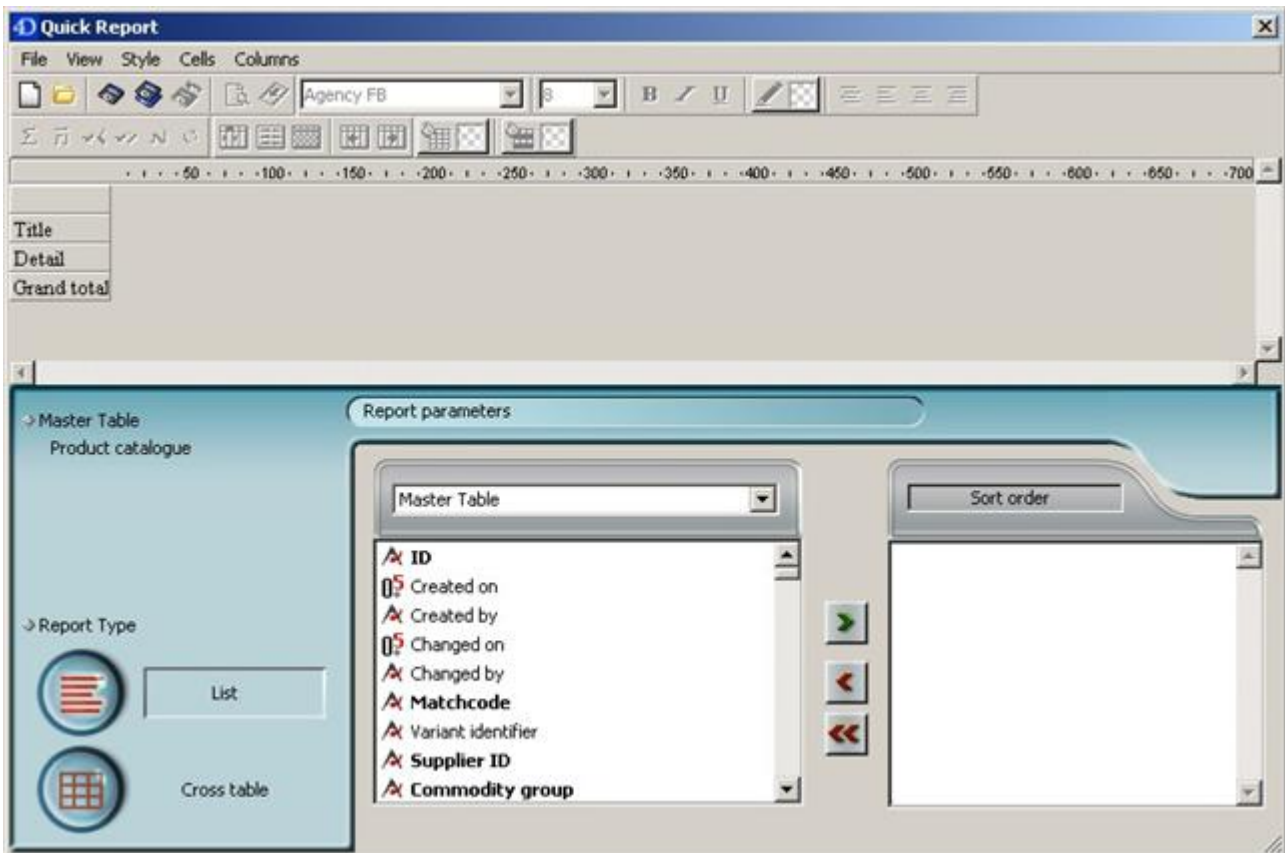


The Sirados MDI Data Import, the Eldanorm Data Import and the Zvehnorm Data Import, function similarly to the Data Standard Data Import.

Free Summary

Note: The chapters on the Free Summary in the modules "Contacts" and "items" are identical. In order to also use your

data from Ingenious.V12 in other applications, Ingenious.V12 offers you the easy Export Function, "Free Summary" (This is also partly used under the term ASCII Export in the user administration, for example). If you click on the menu option, "Free Summary", the so-called Quick Report, consisting of three main data areas, opens.



View of the export function

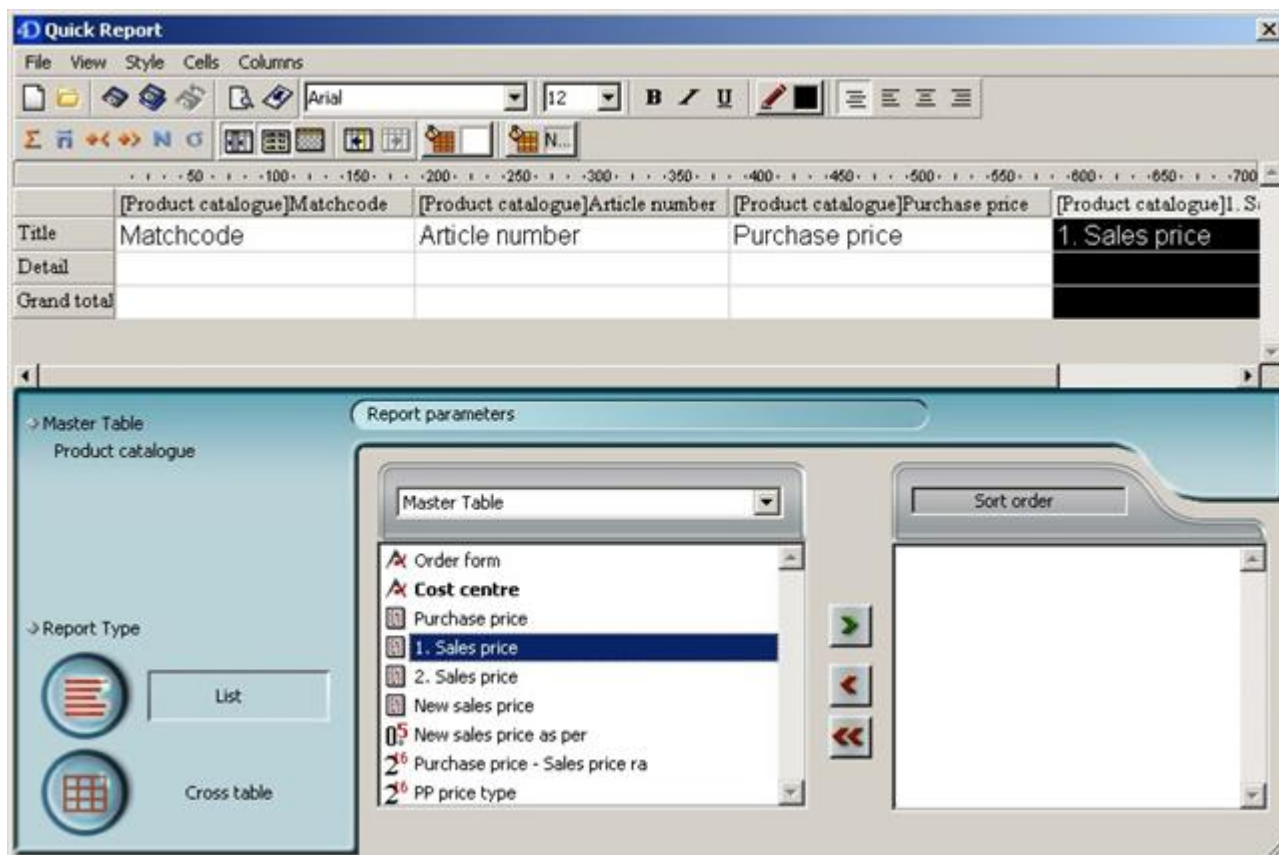
Notes:


- A) Everything that is found in the selection area can be exported.
- B) Everything that is found in the export area will be exported.
- C) One can sort the data to be exported in the sort area.

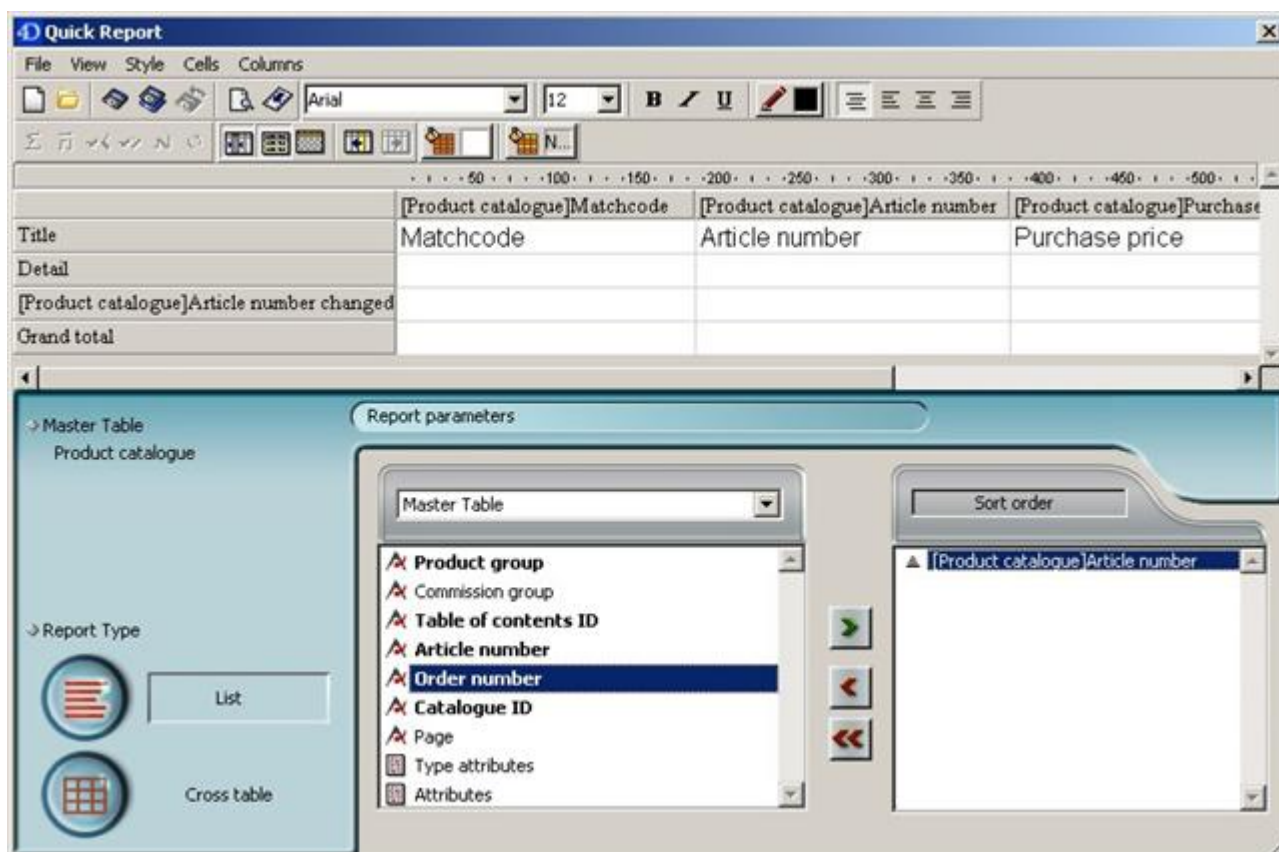
Practice using the Free Summary

In this exercise, all files from the item listing, "8. Motors - motors" are to be exported into the Microsoft Excel program. In addition, you should still sort the export according to the item number.

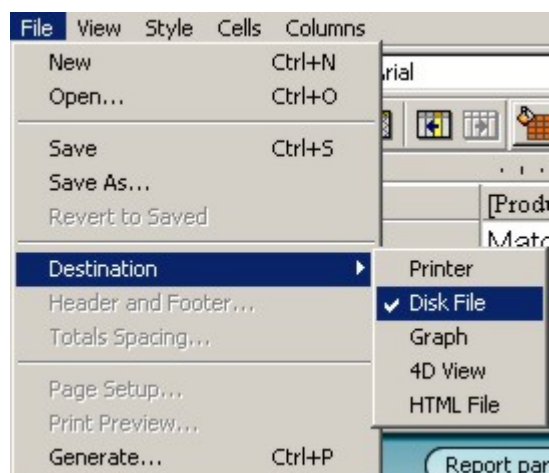
1. Click on the folder "8. Motors - motors" in order to open the files to be exported.
2. In the main menu, select the entry, "Import/Export - Free summary". In the print dialog window that appears, select the option, "All Selected" and confirm this with the "OK" button.
3. In the Quick Report window, you bring the fields "Matchcode", "item number", "Purchase price" and "1.Selling price" from the selection area into the export area. You have two possibilities for this. You either double click on the corresponding fields or you pull the fields with the mouse (Called Drag & Drop) from the selection area into the export area!



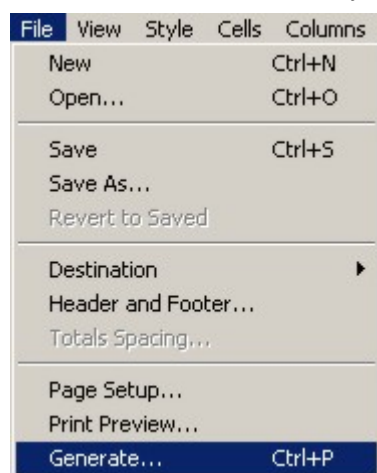
4. Sort your export according to the item number. Either pull the field "Item Number" using the Drag & Drop function into the sort area, or highlight the field and then click on the  button to transfer the field.



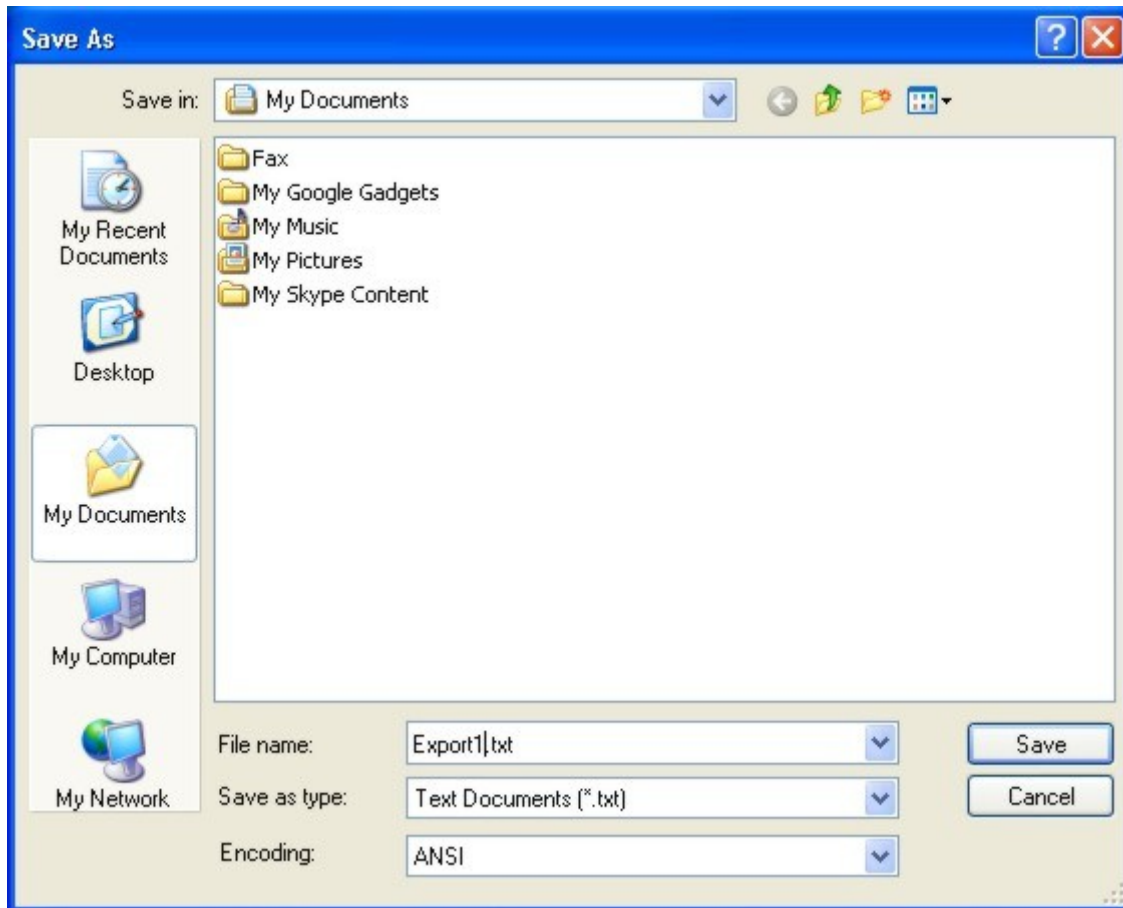
5. In the menu, select the entry, "File/Destination/Disk File".



6. In the menu, select the entry "File/Create...".



7. The standard Windows dialog appears in order to save the data. Select a path and enter, "Export1".



Windows standard dialog

8. After you saved the data, and if you don't want to export anything else, you can close Quick Report.
9. Start the "Microsoft Excel" program on your PC and select the menu item "File/Open".
10. The Windows standard window appears to open files. Search for the file that is to be exported., "Export1.txt" and open it.
11. The "Text Converter Assistant" in "Excel" appears.

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ **Delimited** - Characters such as commas or tabs separate each field.
☐ **Fixed width** - Fields are aligned in columns with spaces between each field.

Start import at row: File origin:

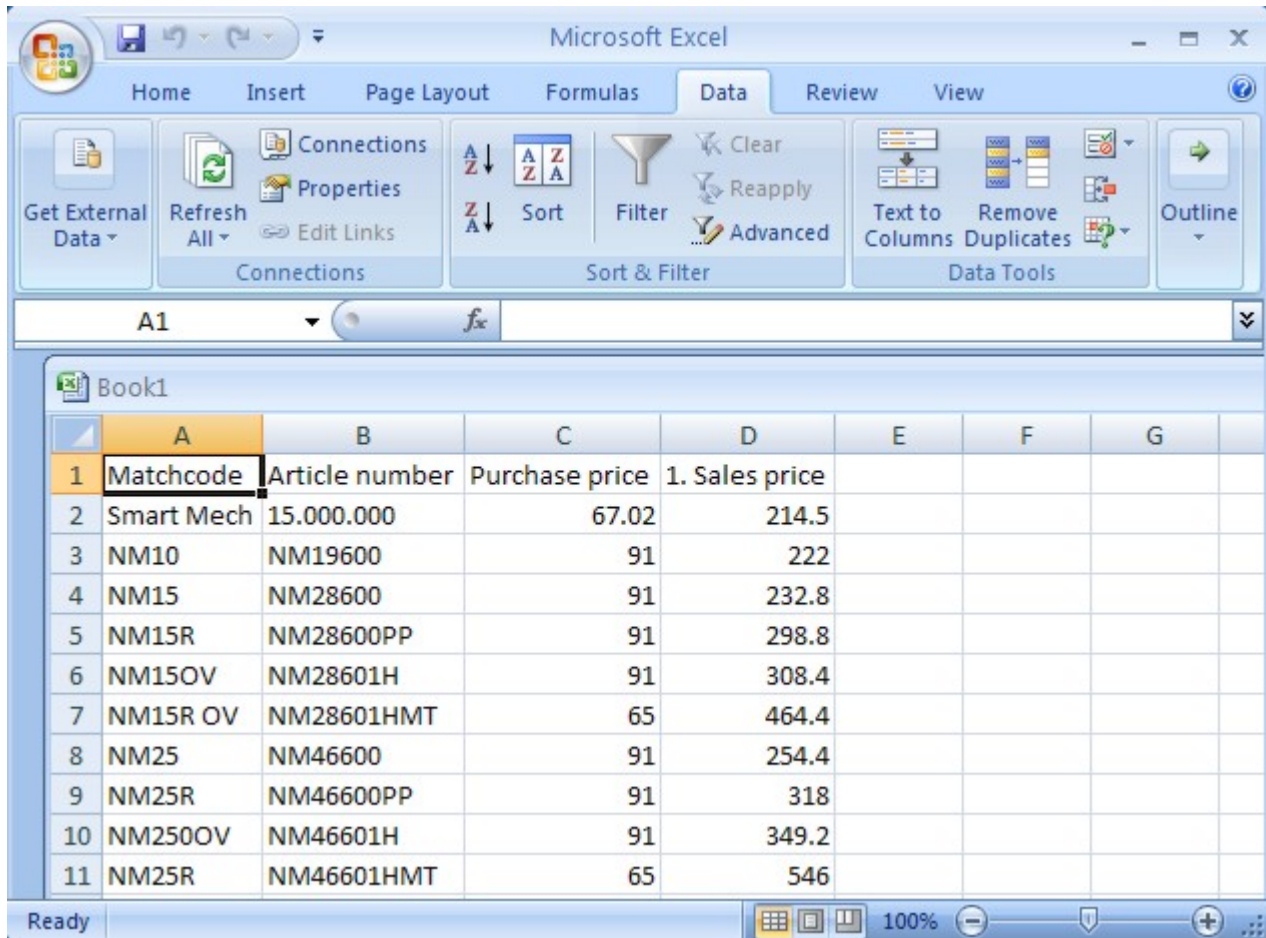
Preview of file C:\Documents and Settings\darrylh\My Documents\Export1.txt.

1	Matchcode	Article number	Purchase price	1. Sales price
2	Smart Mech	15.000.000	67.02	214.5
3	NM10	NM19600	91	222
4	NM15	NM28600	91	232.8
5	NM15	RNM28600	PP091	298.8

Buttons: Cancel, < Back, Next >, Finish

12. Leave the standard settings as they are and click on the "Finish" button.

Your Excel spreadsheet will look as follows.



	A	B	C	D	E	F	G
1	Matchcode	Article number	Purchase price	1. Sales price			
2	Smart Mech	15.000.000	67.02	214.5			
3	NM10	NM19600	91	222			
4	NM15	NM28600	91	232.8			
5	NM15R	NM28600PP	91	298.8			
6	NM15OV	NM28601H	91	308.4			
7	NM15R OV	NM28601HMT	65	464.4			
8	NM25	NM46600	91	254.4			
9	NM25R	NM46600PP	91	318			
10	NM250OV	NM46601H	91	349.2			
11	NM25R	NM46601HMT	65	546			

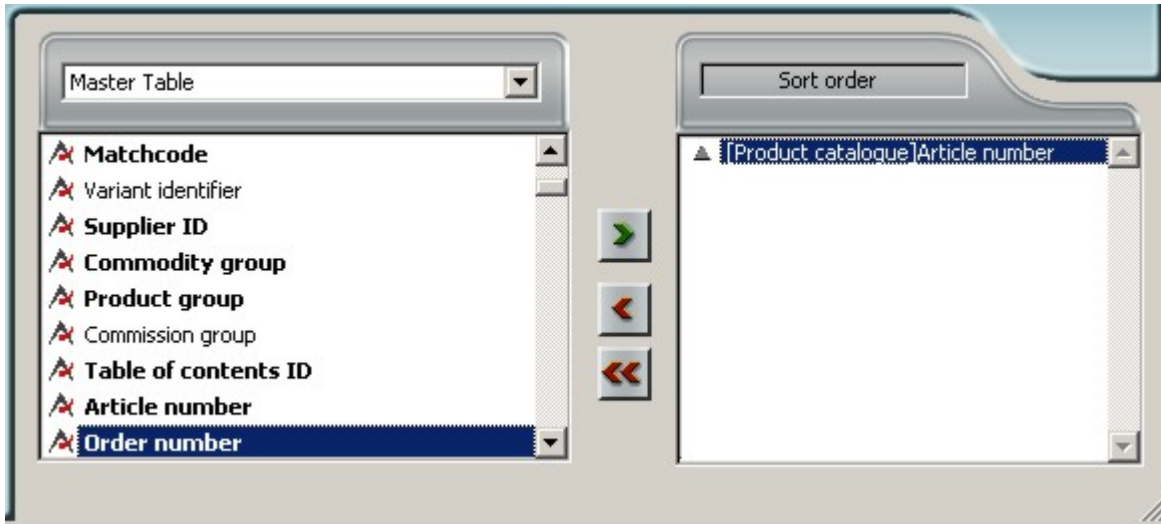
As you can see, the selected files are listed among each other with the respective column description located at the top line of the table. Since the terraces contain Awnings Cap and Cap_d price matrices, these are also listed. All items are sorted in ascending order according to the item number. With the help of the text file (*.txt) you can now import your data now into every other program without problems, in order to work on it further. Of course the "Free Summary" function offers you even more. This is how you can also sort your export according to hidden, non-visible fields.

Columns
Add...
Insert... Ctrl+A
Edit...
Delete Ctrl+D
<input checked="" type="checkbox"/> Hide
Move Left
Move Right
<input checked="" type="checkbox"/> Automatic Width
<input checked="" type="checkbox"/> Repeated Values

In order to do this, you must only hide the field that is not to emerge afterwards in the exported file. This happens within the export area. Simply right click on the appropriate field and select the entry, "Hide" from the context menu that now appears. As a distinguishing feature, the field is now covered now with a grey diamond grid. In the exported file, the hidden field does not appear anymore, but it will still be sorted afterward.

[Product catalogue]Matchcode	[Product catalogue]Article number
Matchcode	Article number

In the export function, you can also specify if you want to sort in ascending or descending order. In order to do this, it is sufficient to click on the triangle next to the field that is to be sorted in the sort area.



3.2.1.5 Creating a new item

Since the procedure for creating a new item will probably come up more often during your company operations, much attention was given to accomplish this quickly and easily during the development of Ingenious.V12. To create a new item in Ingenious.V12 is not difficult, but one should think about the respective item before starting this. For example, one should think about which description the item should receive, with which pricing method it should be calculated, what the SP and PP price ratio is, etc.

The Matchcode

The description (the matchcode) of the item must always be clear and non-exchangeable, even if you have thousands of items in your database. This also applies to individual variations (for instance in the color and the material) of the item. For example, even if an item from two suppliers is ordered, the matchcode must provide information about it. That means that the item has to exist twice: once from supplier A and once from supplier B. From the beginning, you should define a certain system of assigning matchcodes. Otherwise the danger exists that your problems with the name assignment will constantly rise with the increase of the number of items in your database. A matchcode in Ingenious.V12 can consist of 1 to 50 symbols. Numbers and special characters such as: # / ; , . - _ are permitted..

The Price Types

In Ingenious.V12, the following price types are available to you:

Unit price	The item price is calculated according to piece
Scaled price	Unit price, but quantity-dependent
m-Price	Price per meter
sqm-Price	Unit price varies according to the length of the item
Cubic meter price	Price per cubic meter
m-Scaled price	Price per square meter
x/y-Scaled price	Price per piece varies according to the measurements (i.e. width and height)

The price descriptions

You can provide three different prices per item.

PP Purchase Price

SP 1 Normal selling price or unit price (if the item is used in a parts list)

SP 2 Alternative selling price, one from SP 1 deviating selling price, i.e. for specific contact groups that are optionally applicable.

The price ratio

With the calculation of your PP/SP price ratios, Ingenious.V12 leaves all possibilities open to you:


USD/USD Purchase price and selling price of the piece items are known.

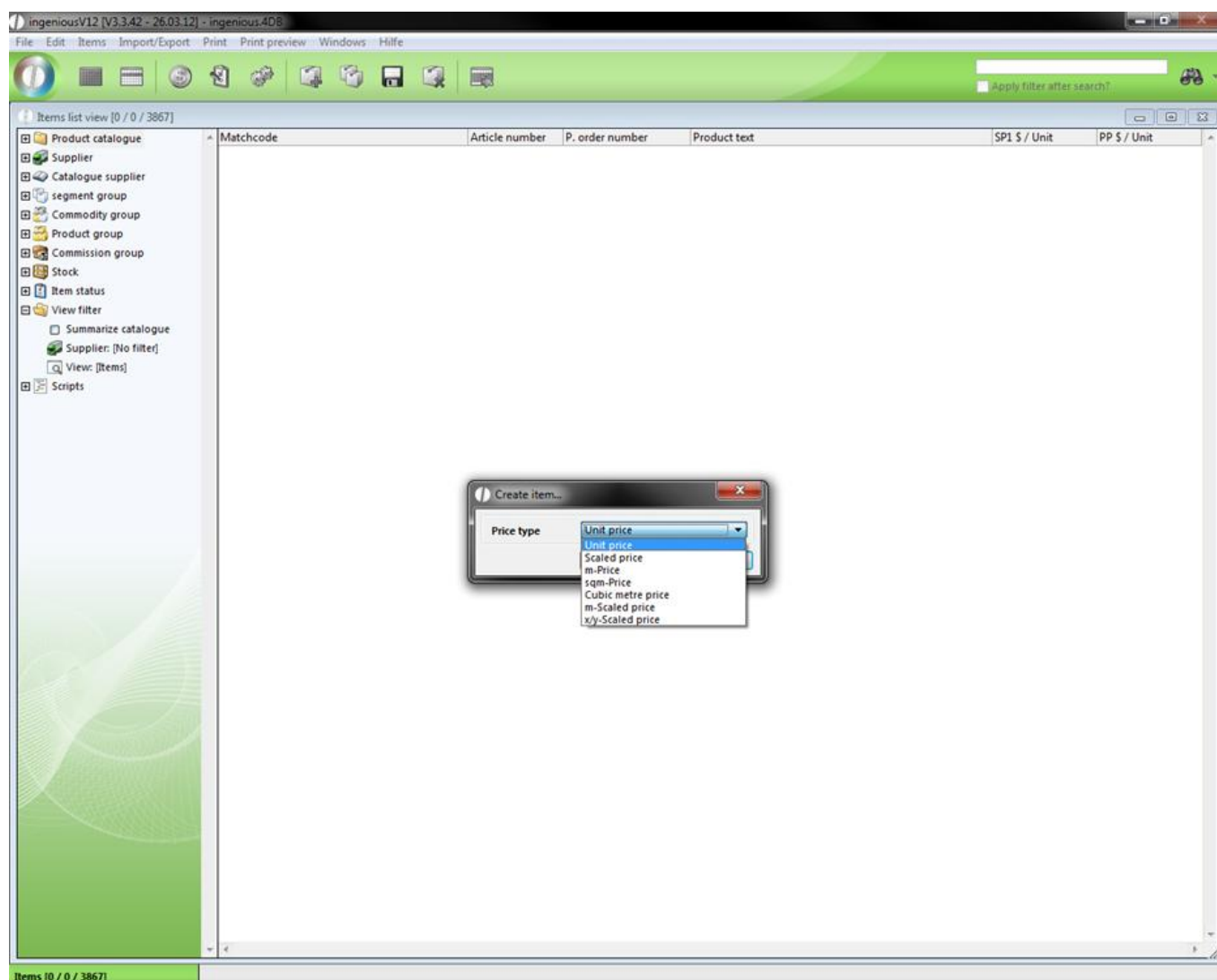
USD% Purchase price of the piece items is known and the SP will be calculated over a percentage premium.

%/USD Selling price of the piece item is known. The PP is entered as a discount.

USD/min This item covers only work time. With this price ratio, only the selling price must be registered. It displays a number of minutes (i.e.: 60 for 1 hr.). The PP optional and should only be entered if an amount per hour that deviates from the normal hourly rate, is to be calculated.

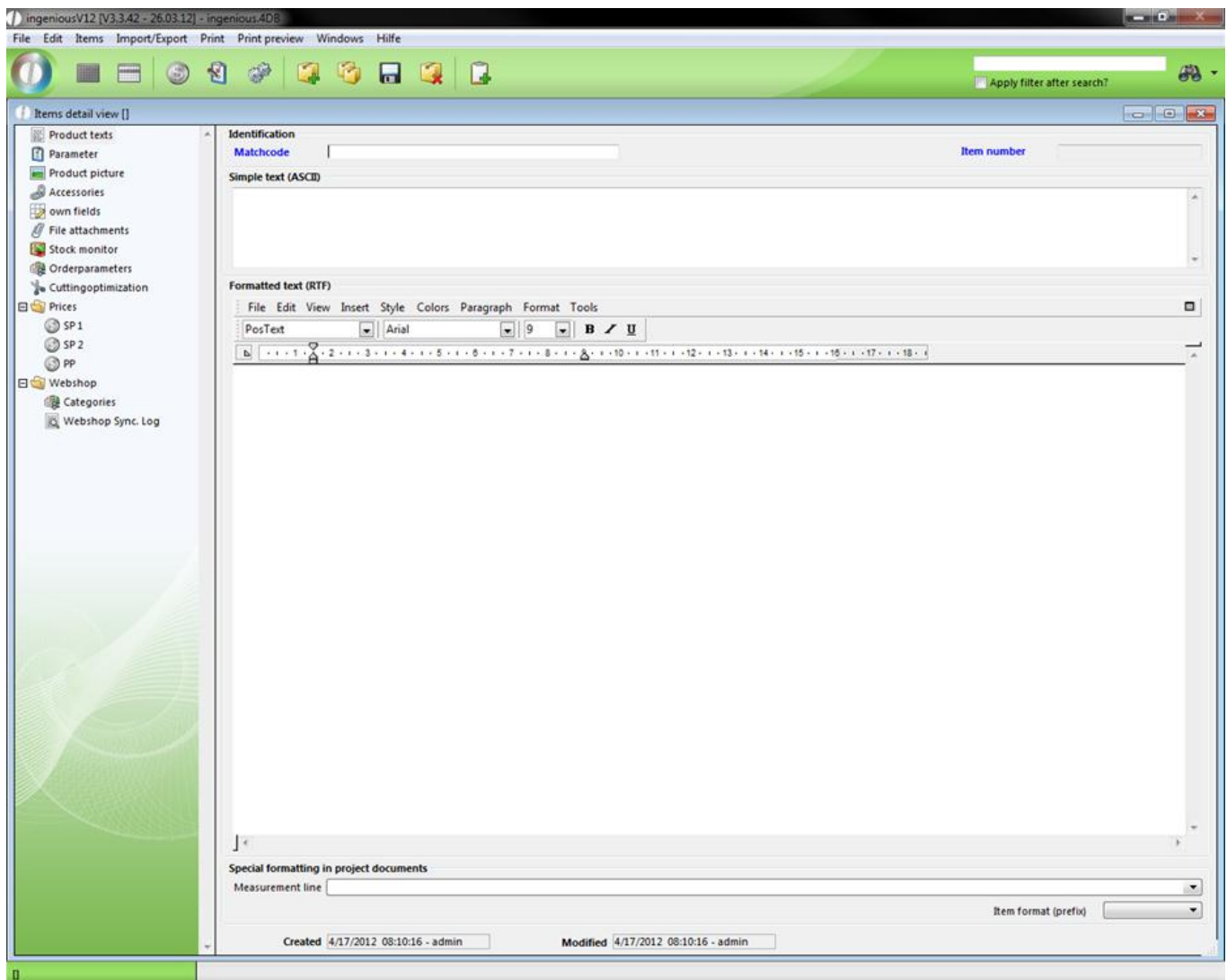
Practice creating an item

1. In the icon bar of the module window, press the  button to create a new item or you can go to the menu, "item" and confirm the item type there (item, m-item, sqm.-item or a two-dimensional price list).
2. In the following window, select the item type. Here you have the choice between the price types already known by you:



3. Select Unit price and confirm your selection with "OK".

The module window changes in the detail view of the created item.

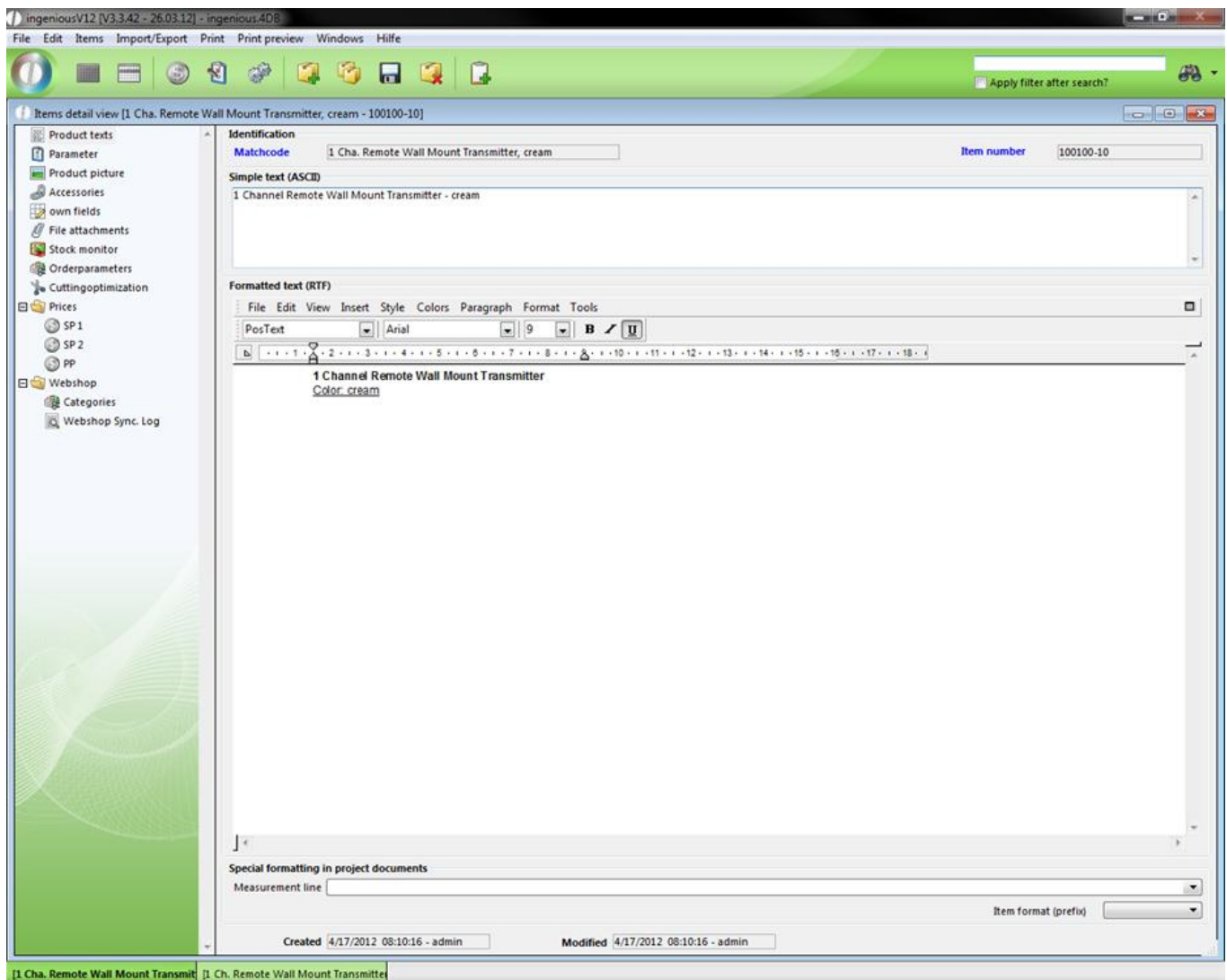


Blank detail view of a record

In this view, all item data are arranged. First give the item a matchcode. This matchcode is to the product as the fingerprint is to a person. It clearly identifies the product.

4. In the matchcode field, write "1 Channel Remote Wall Mount Transmitter, cream" and enter "100100-10" in the field.

5. Next, briefly describe the product, "1 Channel Remote Wall Mount Transmitter - cream" in the field "Simple text (ASCII)".



In the area, "Formatted text (RTF)", you have the possibility of adding formatted texts and even pictures to the item with the help of the integrated text processing. In this way you can include a complete item or product description in the respective file.

6. In the data selection area, change to the "Parameter" column.

In this column, the areas, "Manufacturing", "item Status", "Renting/Serial Number", "Finance Account" and "Classification" are included.

7. From the pop-up menu, select "Position in the part list" and select the option, "5.Controls".

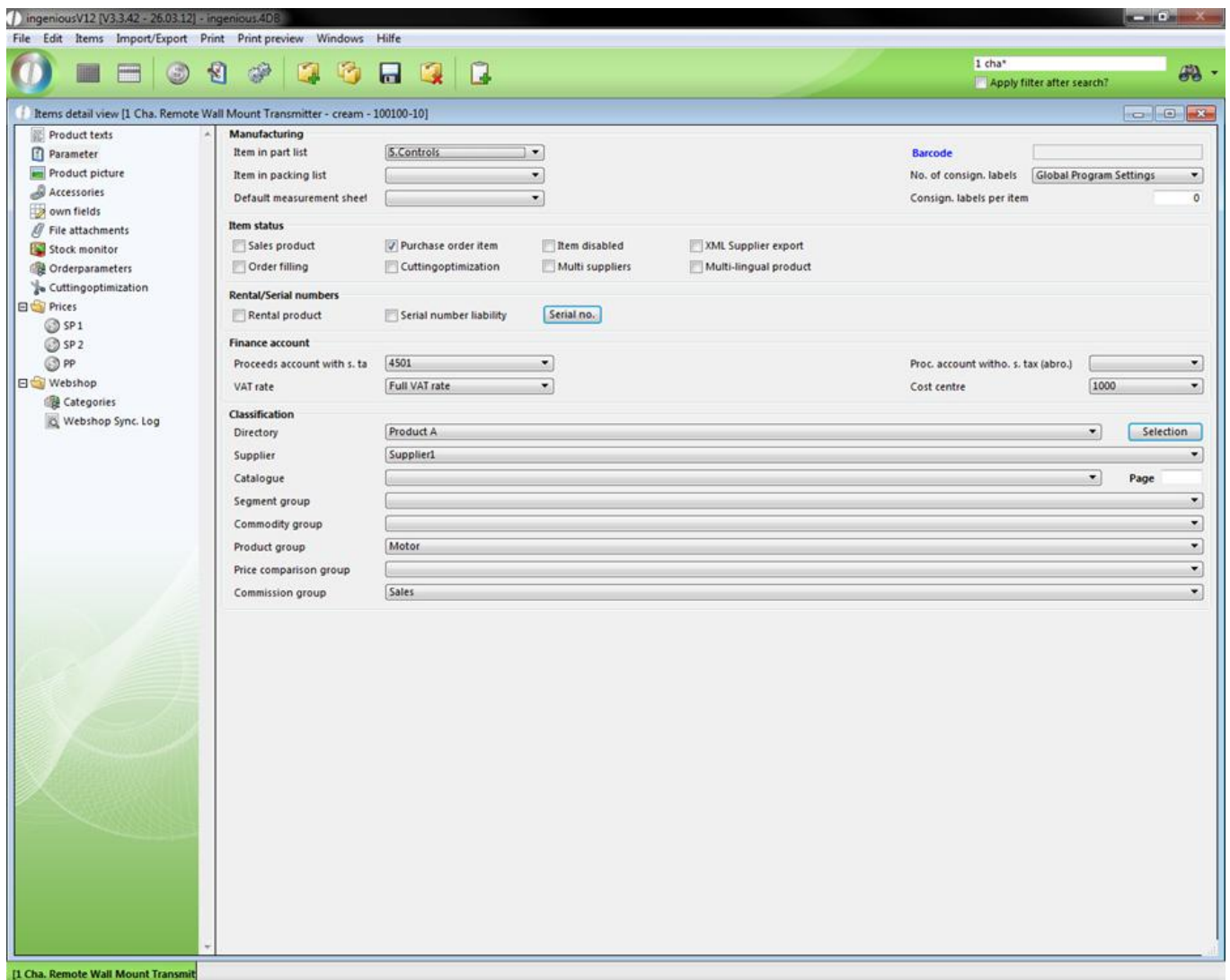
8. In the item status area, remove the check mark from the field, "Sales product".

Since the end rod used in this item shows only a part of the complete shutter and not a single sales product, a check is not placed next to "Sales Product". This means that the item is represented later in the list view in grey instead of black, since it is not a sales product.

9. In the area, "Finance account", select the accounts, "1000" and the FIBU revenue account with USt, "4501".

Note: As with all other pop-up fields in Ingenious.V12, these must also be adapted particularly to your enterprise. You have the possibility to do this in the program settings.

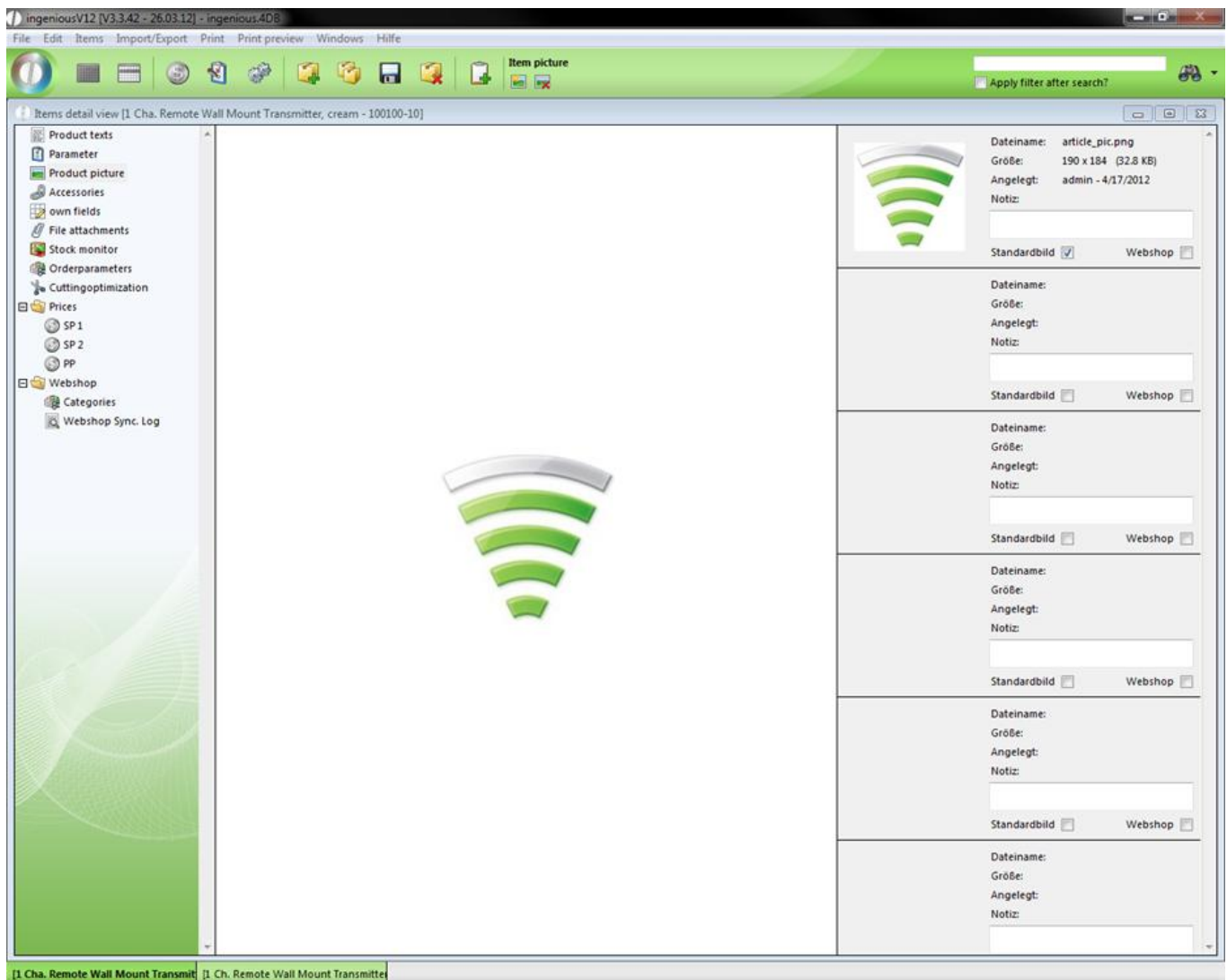
10. In the area, "Classification", select the options shown in the illustration below as an example.



11. Now select the column, "Product picture" in the data selection area in order to add your end rod.

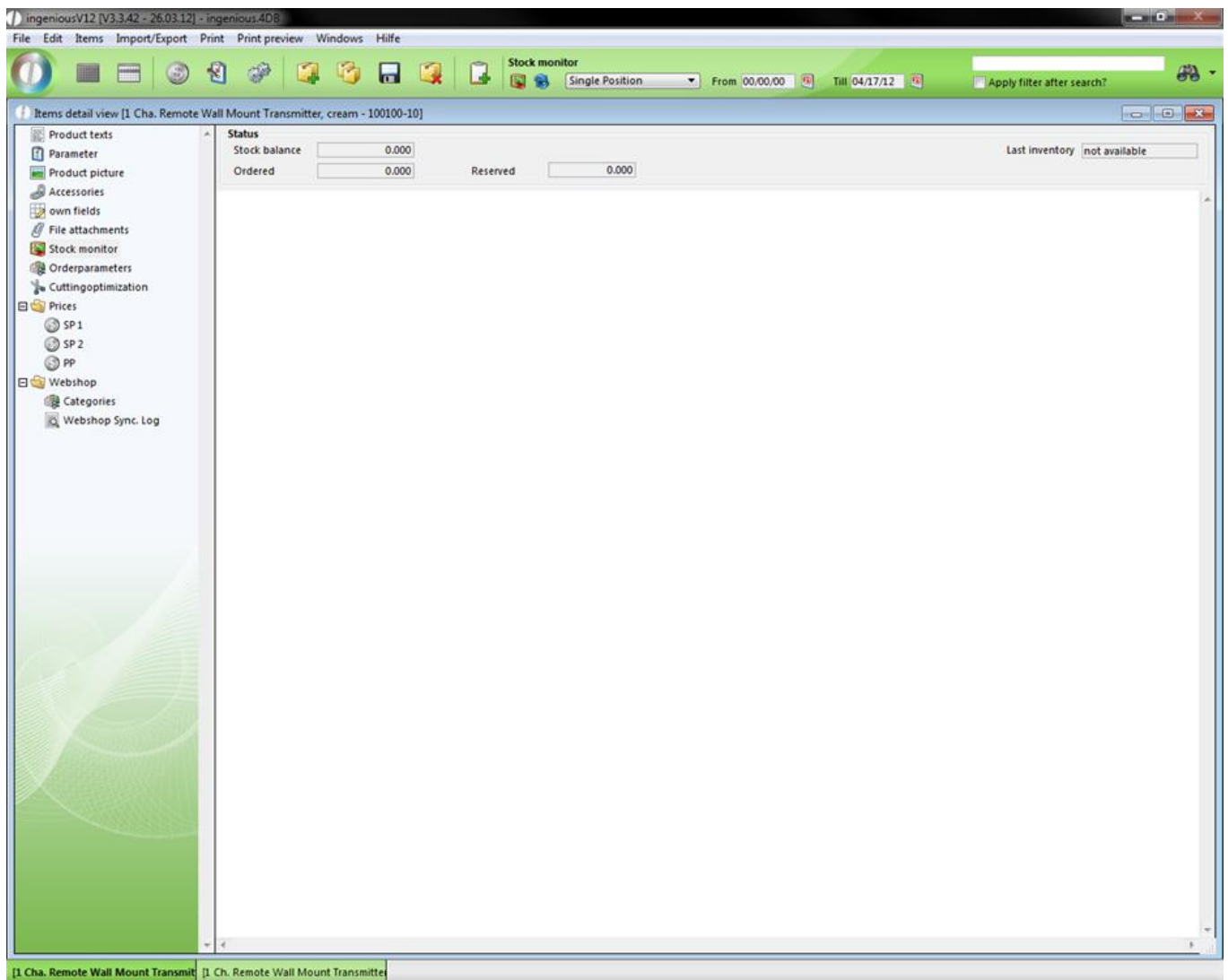
12. In order to do this, simply click on the icon, "Add Picture" .


13. The Windows standard window appears for you to open files. Here select your CD-ROM or hard drive and select any picture file.

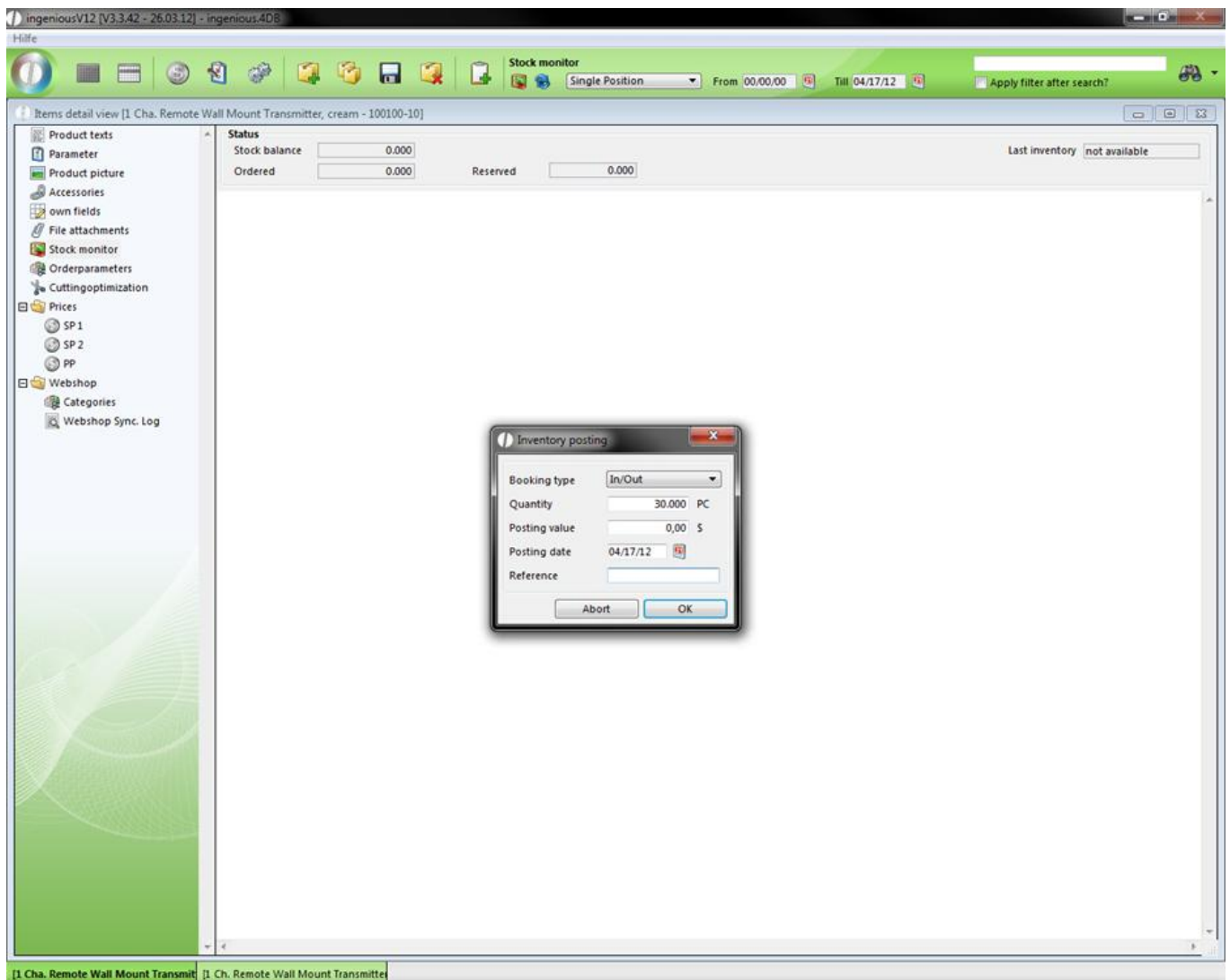


14. Switch to the column "Stock monitor".

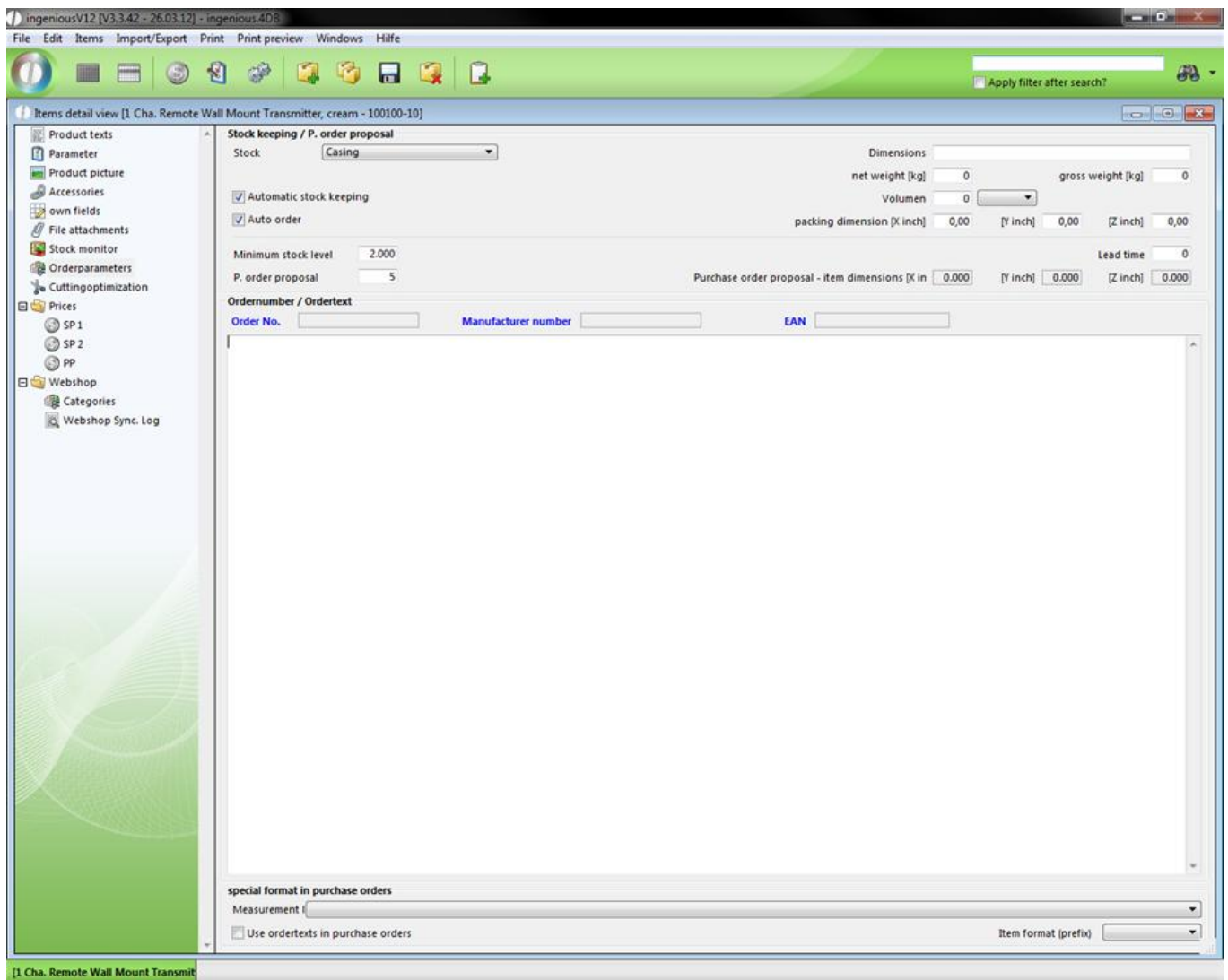
In this column, you have three inventory displays available in the "Status" area. One is for the actual status, one for ordered items and one for the status of the last inventory.



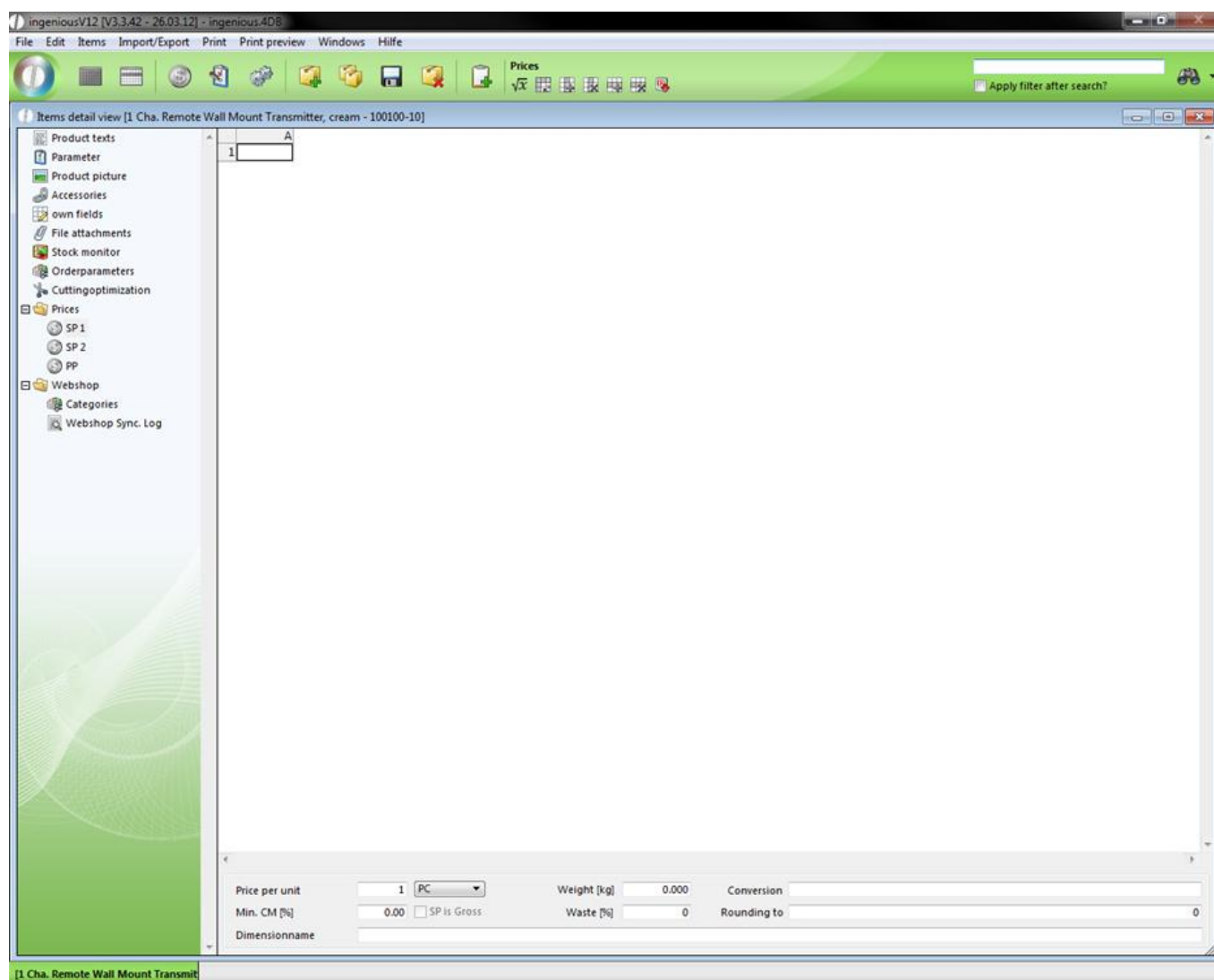
15. With the  button, now enter a stock item input/output at a value of 30 and confirm the window with "OK". You now initiated a starting inventory, without which the automatic storage management of the following column would not be possible.



16. In the column "Order parameters", you can select the options, "Automatic stock keeping" and "Auto order". In this case you must still enter another minimum inventory and an order suggestion. Now select "Casing" in the "Stock" pop-up field.

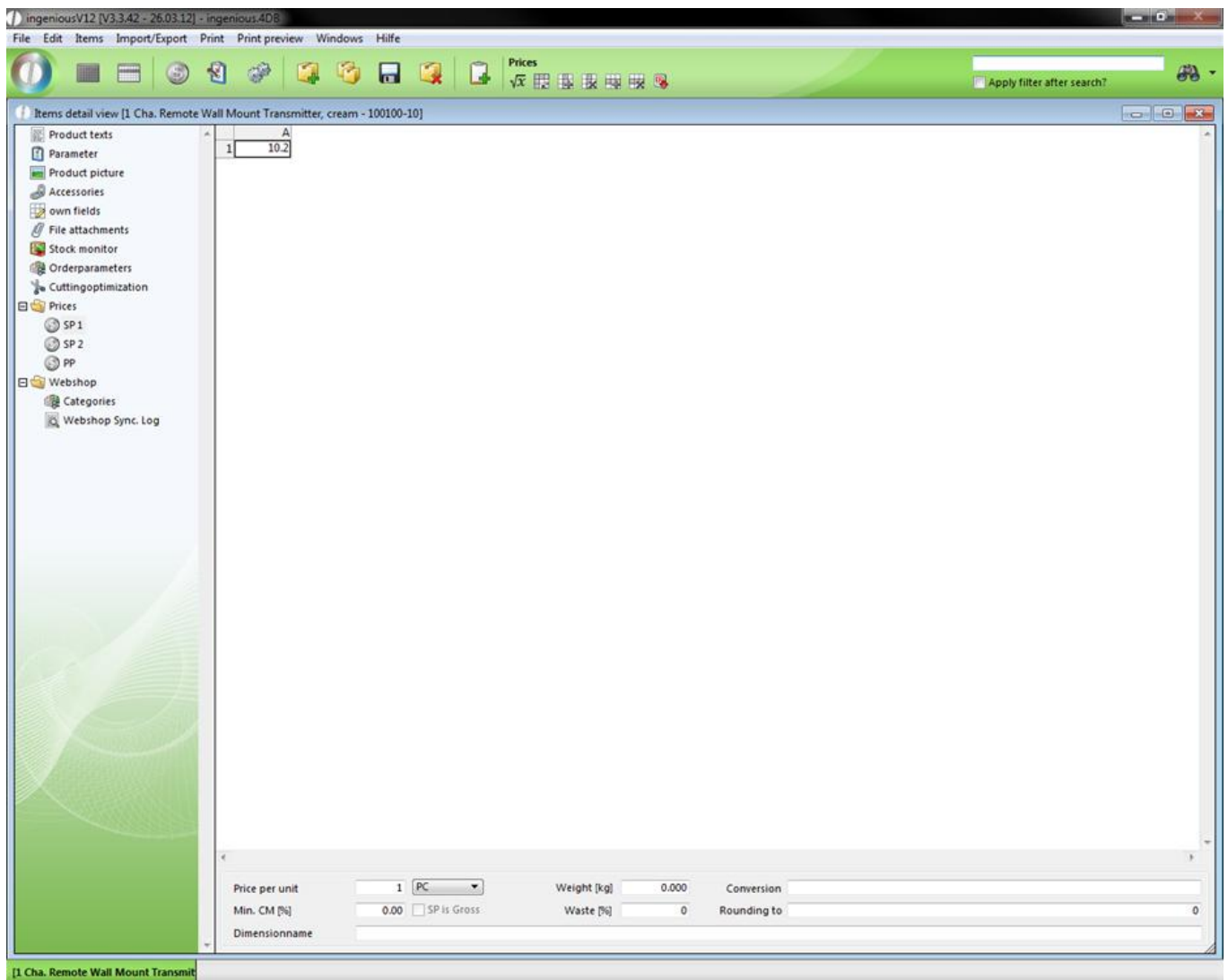


17. In order to give a price to the item, first select the column "SP 1" in the "Prices" folder.



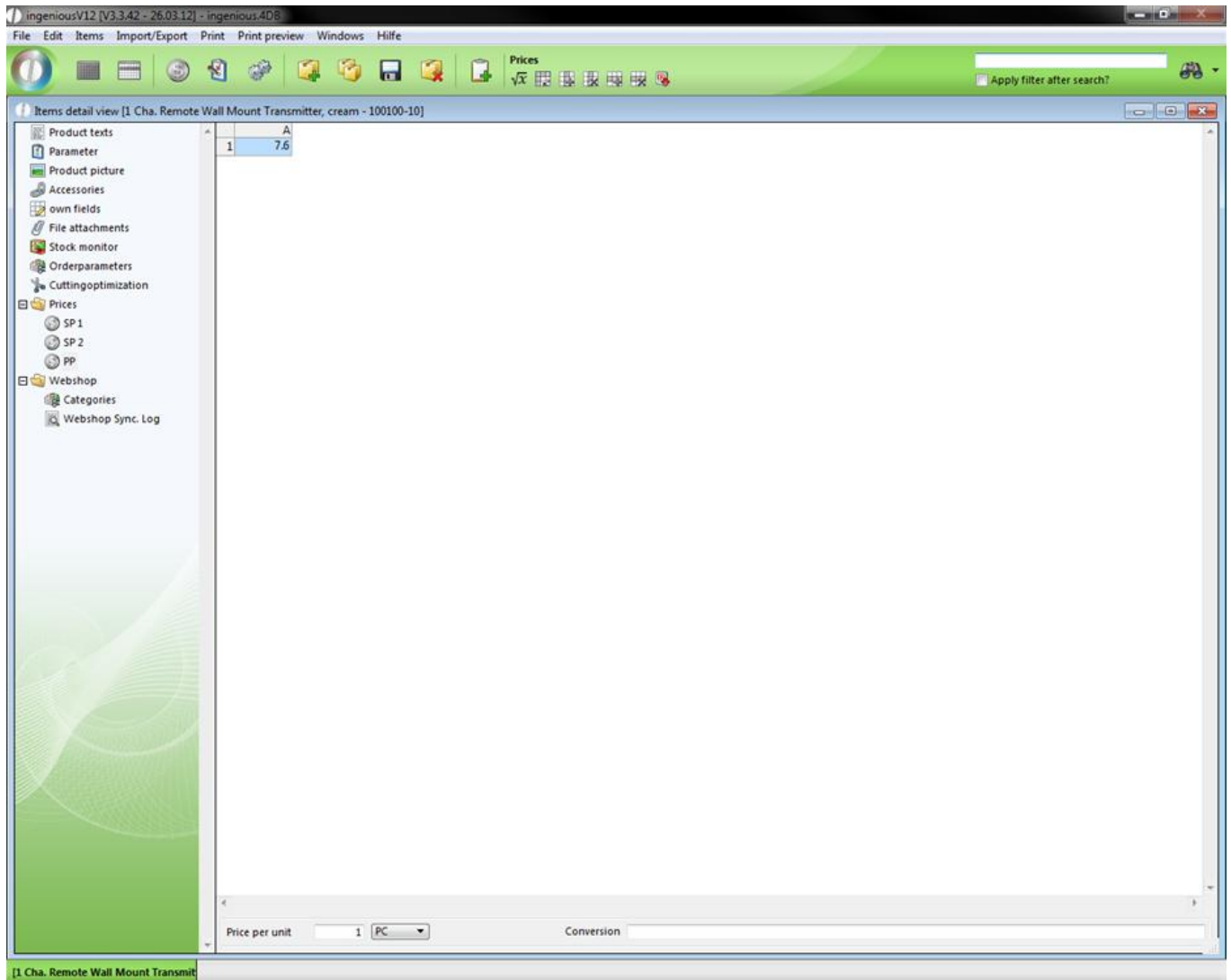
SP1 is the normal selling price or unit price of an item.

18. Mark the cell A1 and enter a SP 1 of 10.20 \$.





In the lower section of the detail view, you will find numerous setting possibilities.

19. Switch to the PP and enter 7.60 here.



20. To conclude, click on the  button to save the file.

The file is created and can be changed, duplicated  or deleted  at any time.

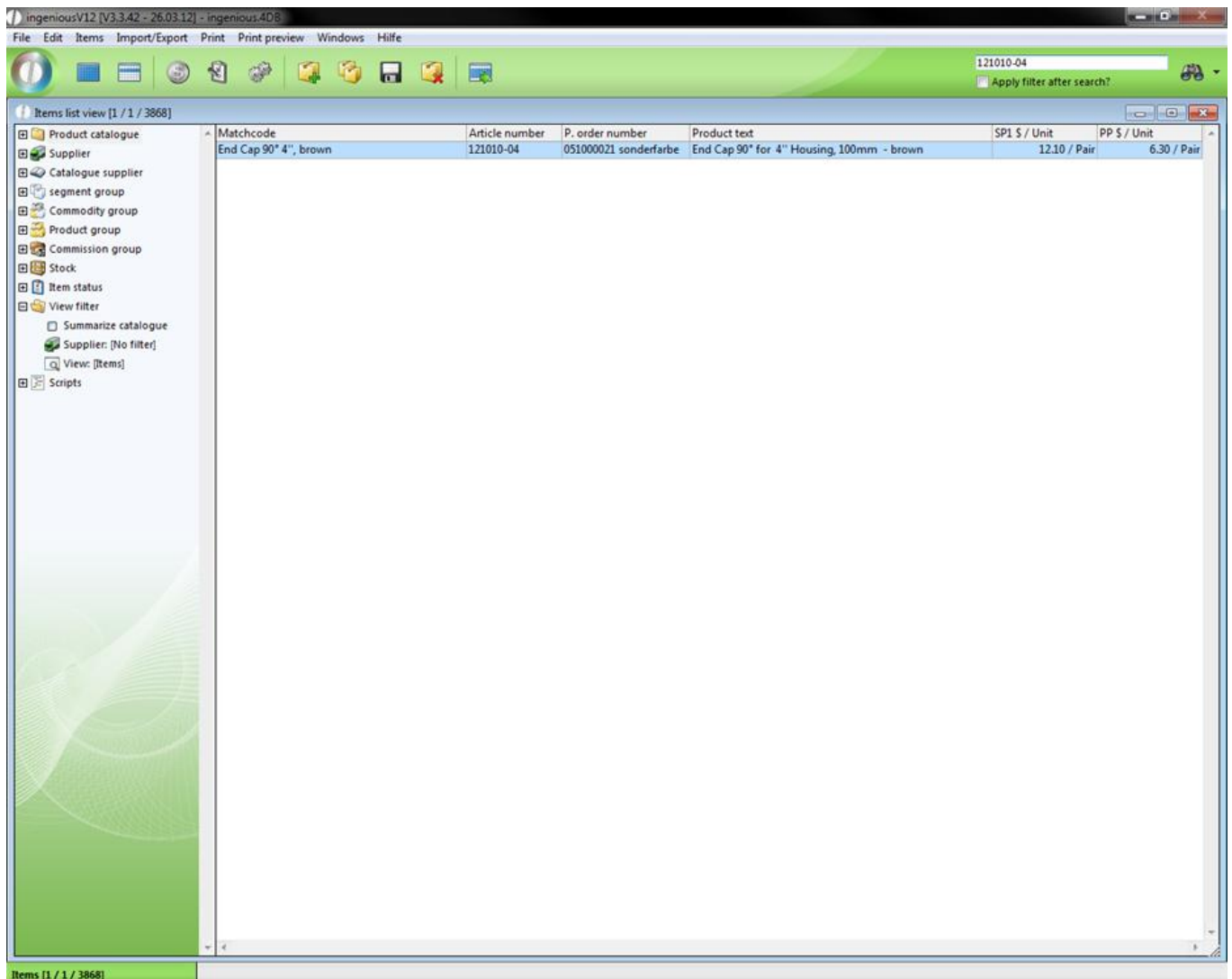
3.2.1.6 Item variants

A variant is a derivative of an existing product. That means, if several items only differ in few characteristics (important for the item), then these are item variations. In short: "item variants are in principle equivalent yet still different". In order to get a better understanding of the term, a short trip into the automotive world follows. The passenger car - model "XY" of a car manufacturer is offered in several variants with special model data (color, equipment, and motorization). But all "XY" - models have common basic data (4 wheels, 1 steering wheel, 1 tank, 1 model name). In order to provide item variants, one must also divide the characteristics of the item into model data and basic data. All variants of an item cannot thus differ only in the model data and under no circumstances in the basic data. If you want to produce variants from an item already provided, you must still only assign it its key and model data. In addition, you proceed as follows.



Practice assigning type data

Note; In order to create the type data of an item, you have to be in the detail view.

1. Mark the item, by which late variants are to be produced. In this example it is the file with the item number "121010-04".



2. Open the detail view of the item by double-clicking.

3. The symbol for the production of the main and type data is now switched from the inactive  to the active  status. Click on it.

The appropriate window appears on the screen. In this example, the variants are to differ only by the color. Material and nominal thickness are to be used as basic data.

4. In the column, "Name" of the area, "Typdata", enter other the values "Form" and "Size" among each other. Do this right next to "90°" and "4".

Your window will look like the following.

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File Edit Windows Hilfe

Modifying key product data [End Cap 90° 4\", brown]...

Type data


	Name	Value
6	DOS_ASK	NO
7	DOS_AO	NO
8	form	90°
9	size	4
10		
11		
12		

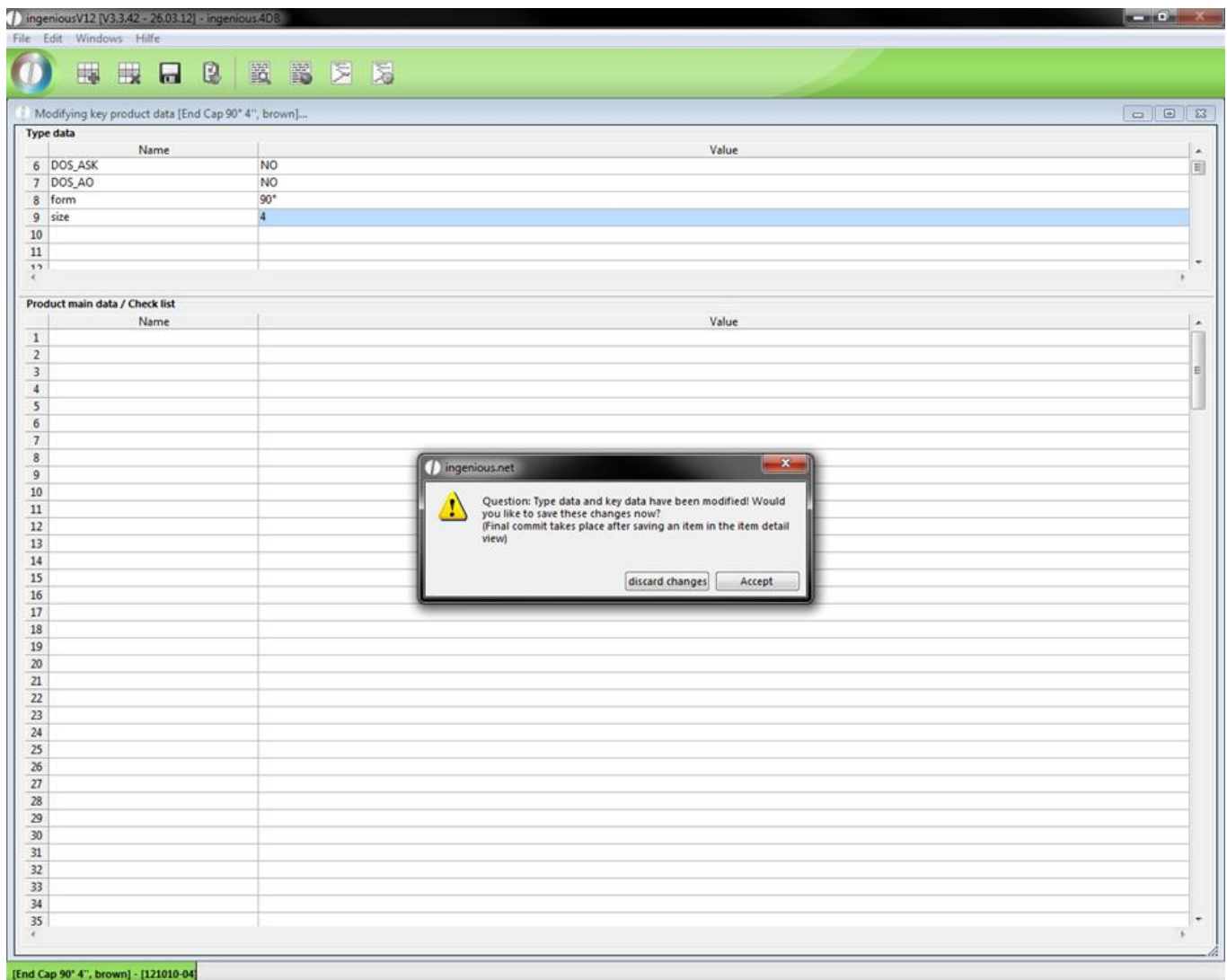
Product main data / Check list

	Name	Value
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		
26		
27		
28		
29		
30		
31		
32		
33		
34		
35		

[End Cap 90° 4\", brown] - [121010-04]

Settings of the basic data

5. Close the window with  and confirm the request with "Accept".

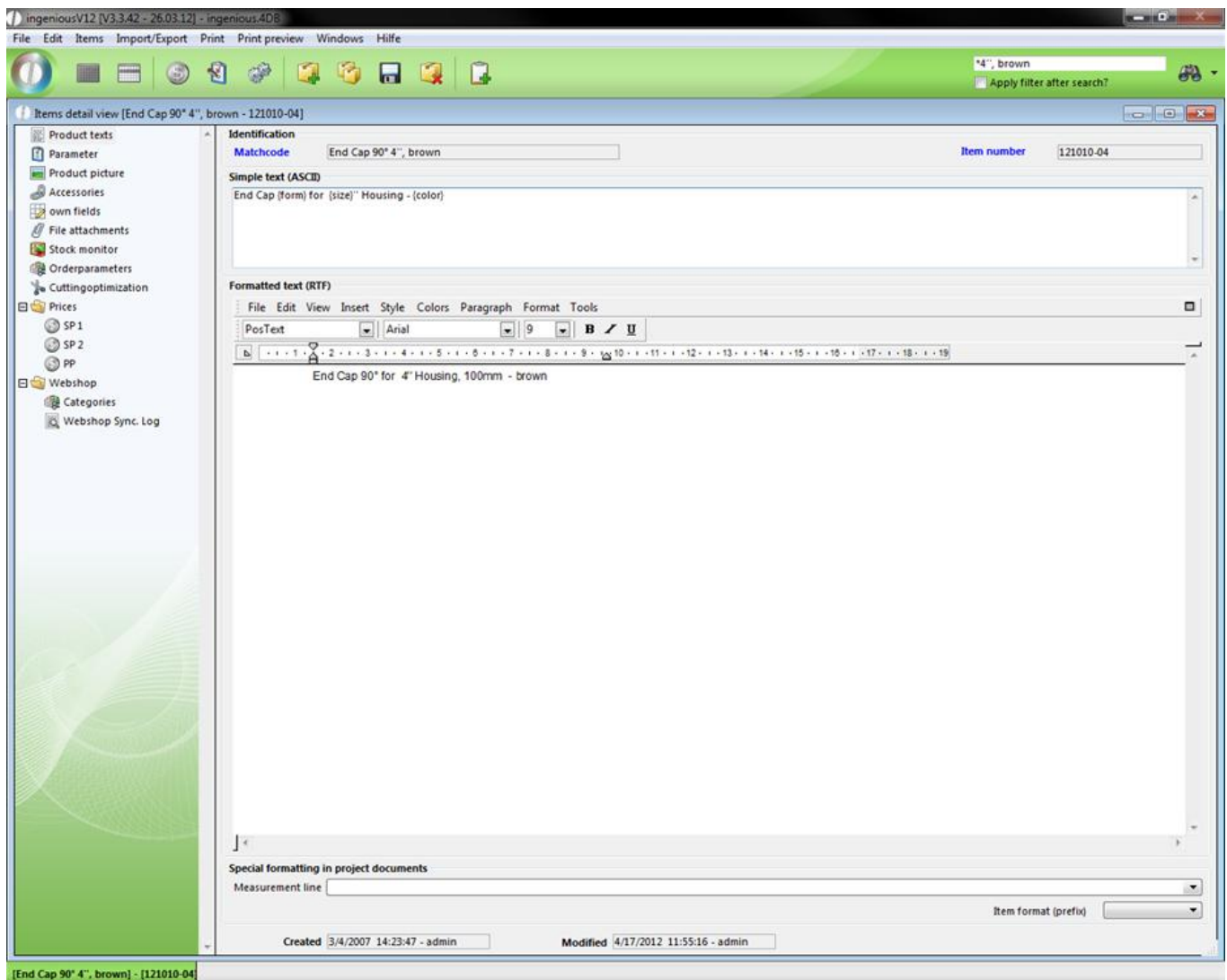


You will find yourself again in the detail view of the file.

The values in the column, "Name" can be used as a placeholder in the item field, "Simple Text (ASCII)" and "Formatted text (RTF)". This means that in place of the placeholder, the applicable value will appear in the text. The names of the placeholders will always be contained in curly brackets ({...}).

In the current setting of the basic data, you have two possible placeholders, "Size" and "Size".

1. Change the "SimpleText (ASCII)" as follows.

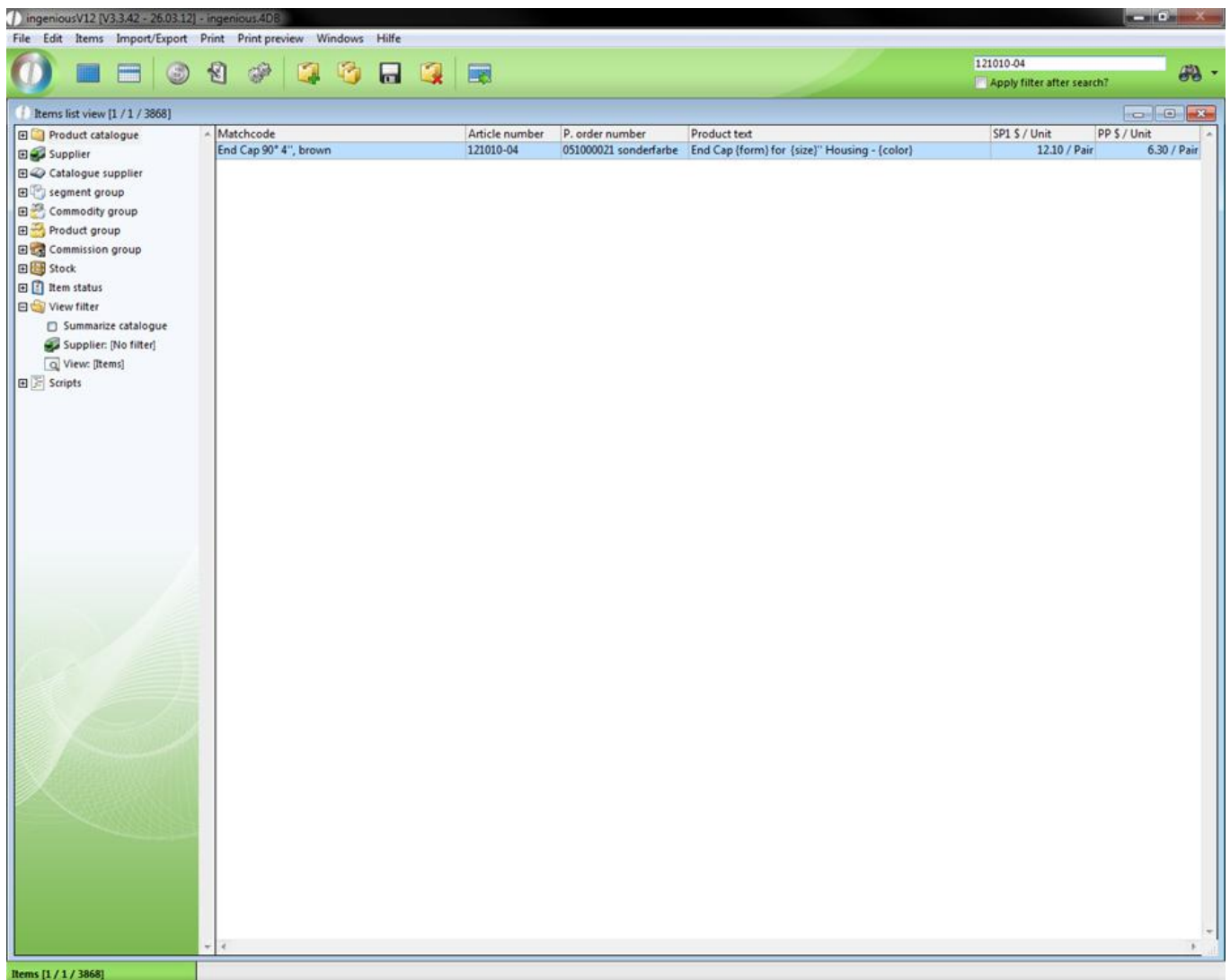


When printing the text, Ingenious.V12 replaces the placeholder with the corresponding values.

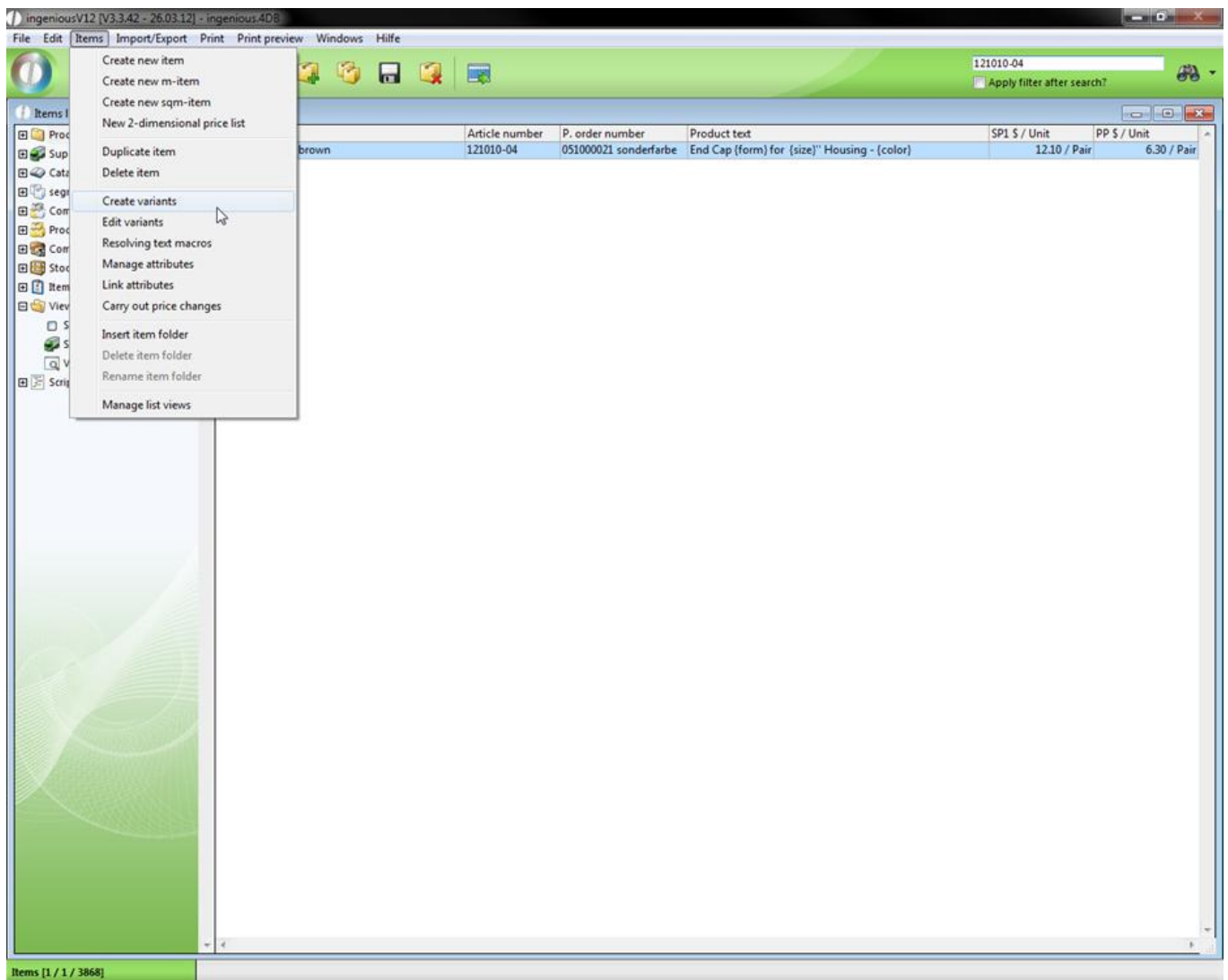
Don't forget to secure the changes in the list view.

Practice generating variants

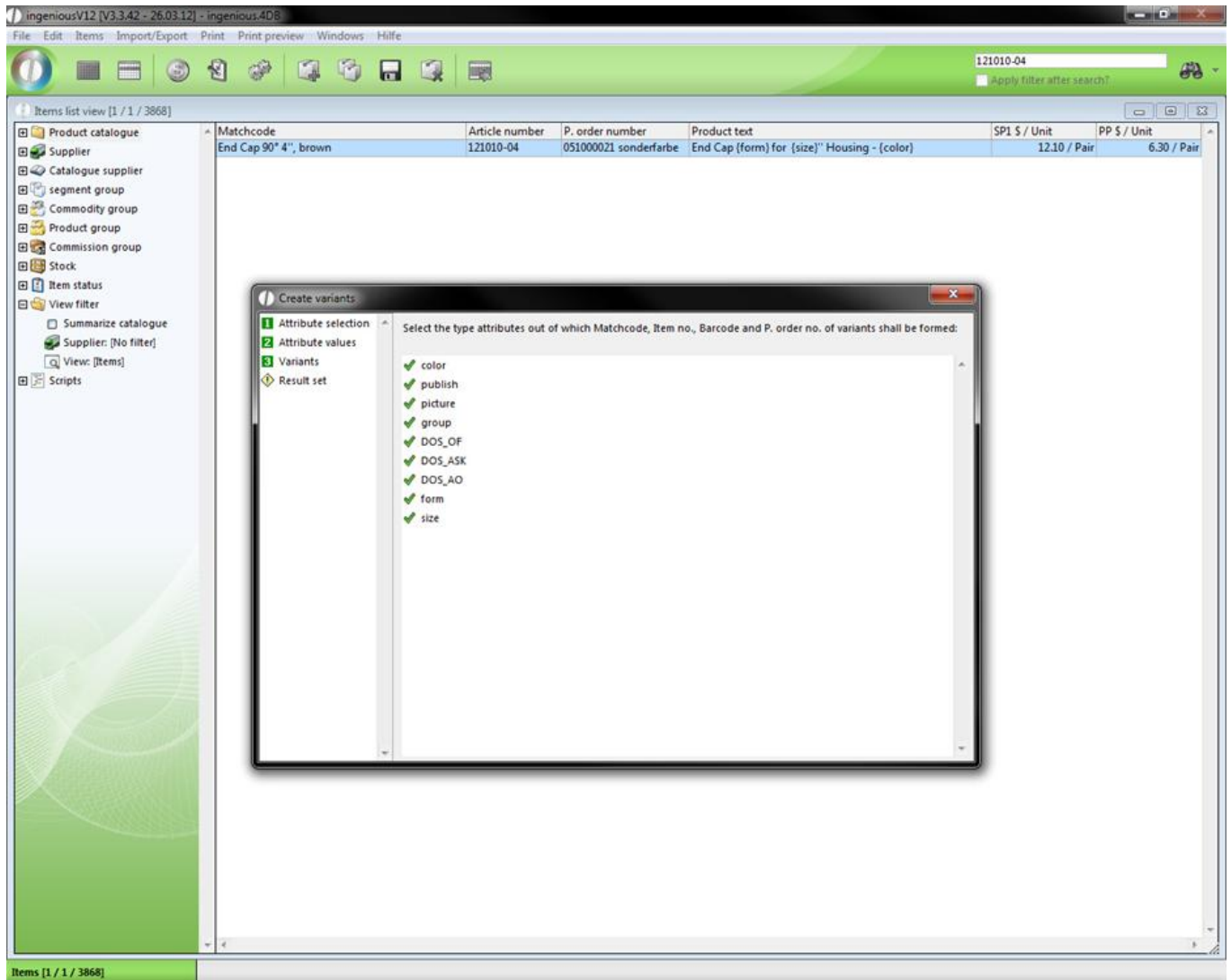
1. Highlight the file from which you want to generate variants. In this example, please select the file already known to you with the item number, "121010-04".



2. In the main menu, select the entry "Items/Create variants".

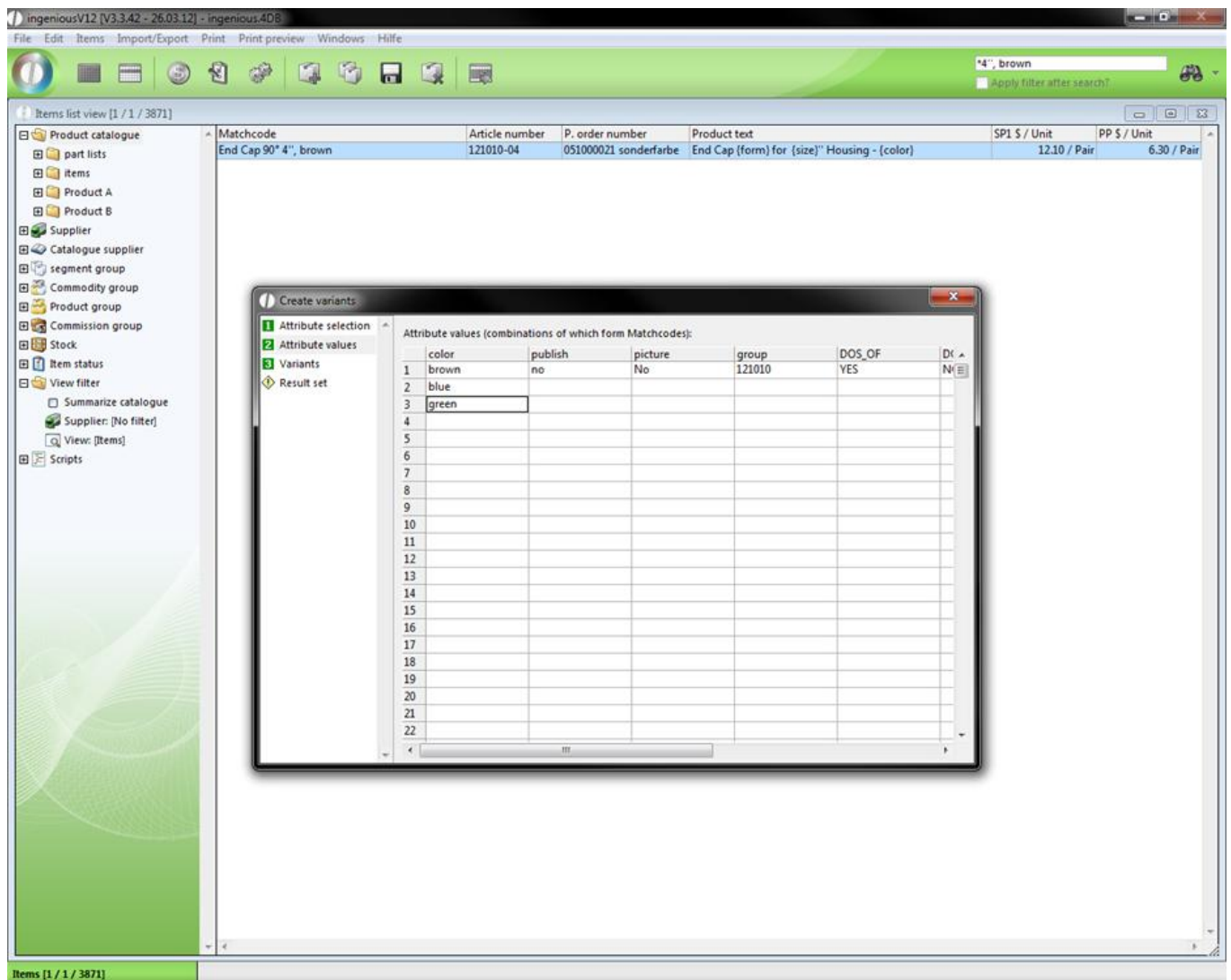


3. A window with the label, "Create variants" appears.

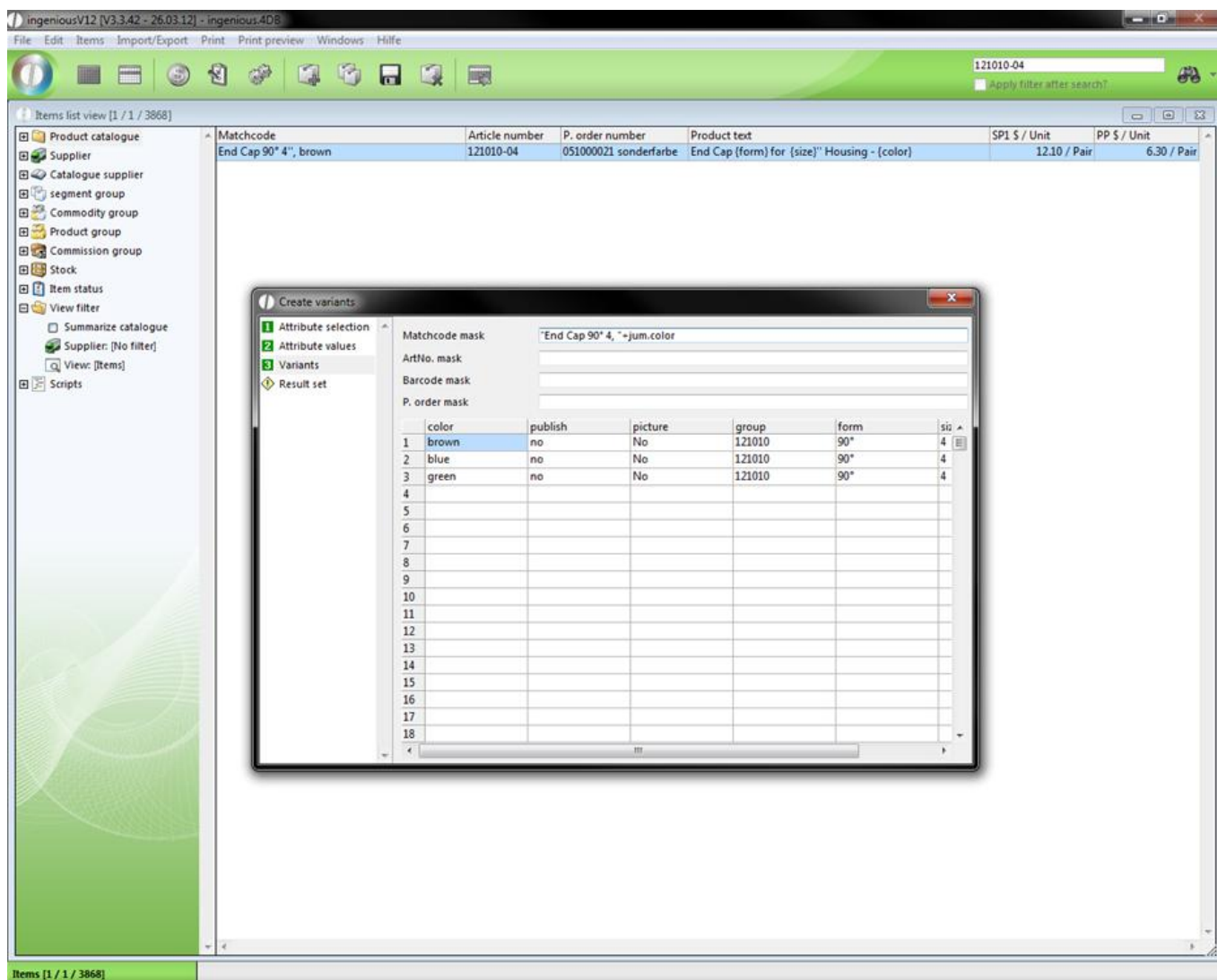



This window divides the variant creation in the left part into four steps. "1 Attribute selection", "2 Attribute values", "3 Variants" and "Result set". They are found momentarily in the first step. On the right side is the selection of the type attributes. This selection depends on which type of data you gave the item, from which you produce the variants.

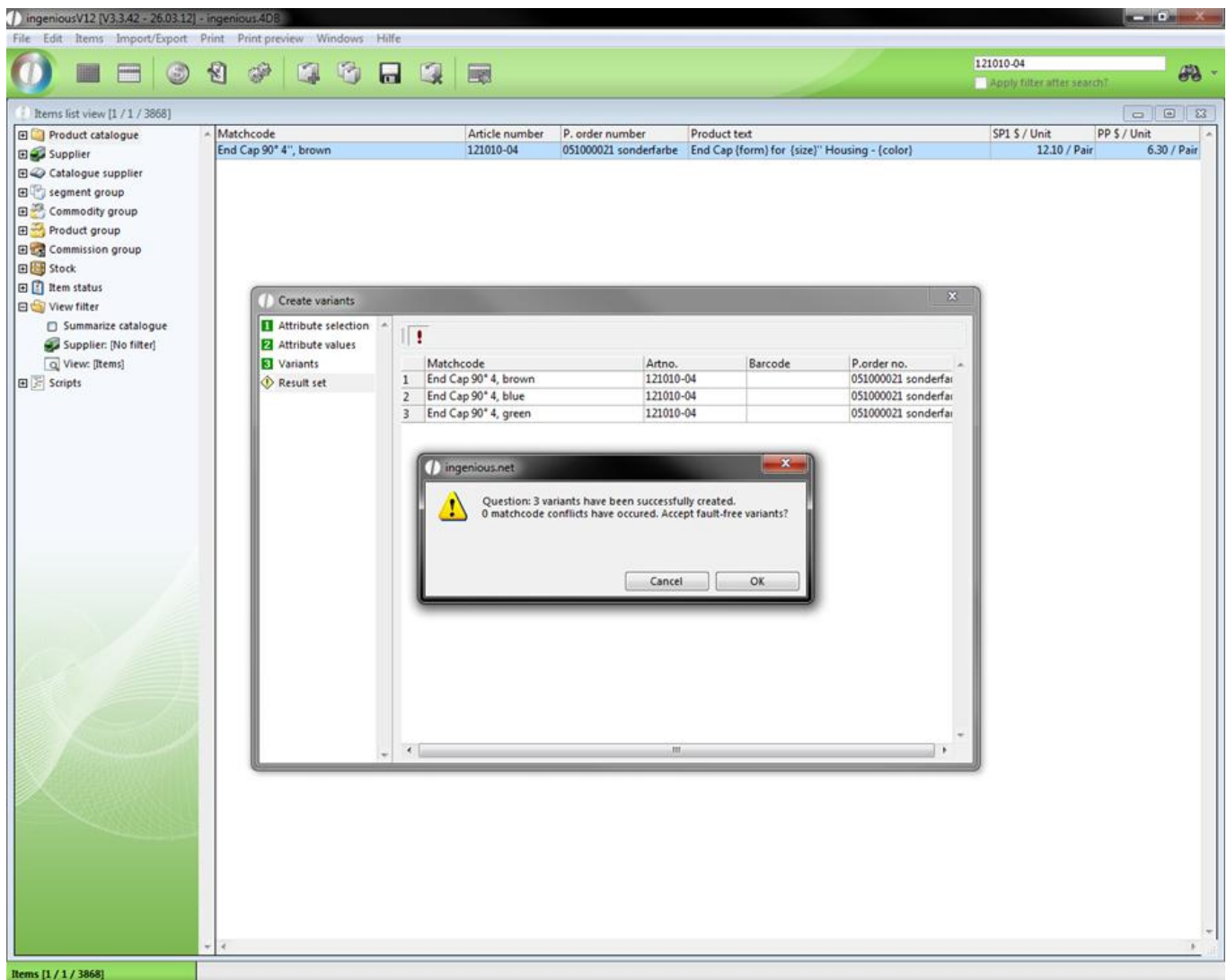
4. Leave the attributes marked and click on **2 Attribute values**. In the open window, the model data of the basic item is indicated automatically under point 1 "Attribute selection". By double-clicking on the attribute, this can be renamed. Replace the attribute "brown" with "blue". In addition, more colors of the attribute can be noted, i.e. green and yellow.



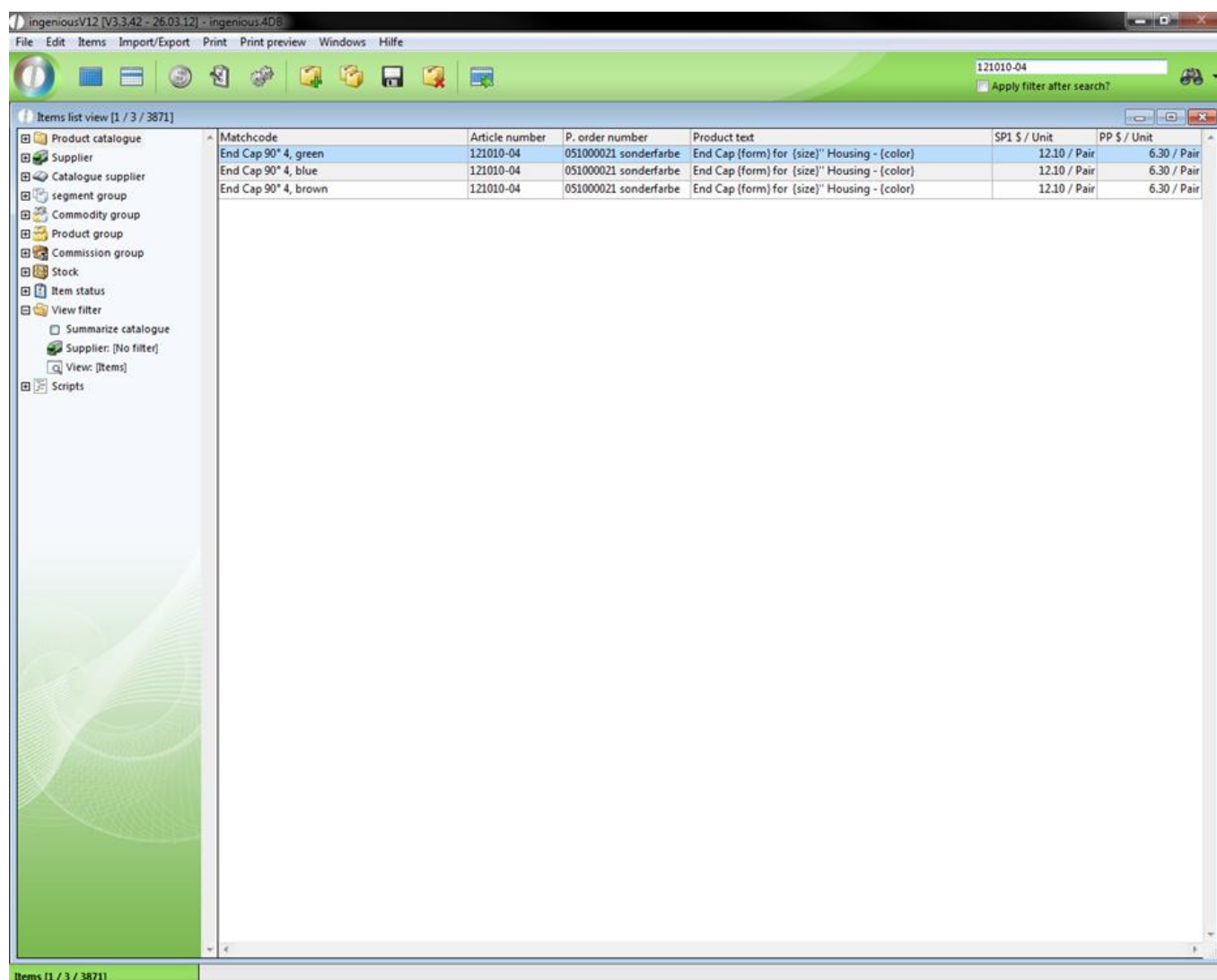
5. Under 3 "Variants", it is possible to generate masks or templates for the matchcode, for the item number, the bar code as well as the purchase order number (over the field editor by means of the jumbo language it is now possible to create conditions for the allocation of number). In the example, only the matchcode is changed over the entry, "End Cap 90° 4, "+jum.color. The matchcode now contains the word "End Cap 90° 4," with the pertinent attribute color.



6. Now switch to the column "Result set". The preview of the item variants is adapted to the field size in the database. If a matchcode has 50 characters for example, one can already see in the preview, which indications are cut off, and one thus has the possibility of already making appropriate modifications before the construction of the item. Now click on the icon  in order to generate the item variants.



7. Confirm the window that appears with "OK". You will automatically go back to the item view, in which your item variants are now shown.



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File Edit Items Import/Export Print Print preview Windows Hilfe

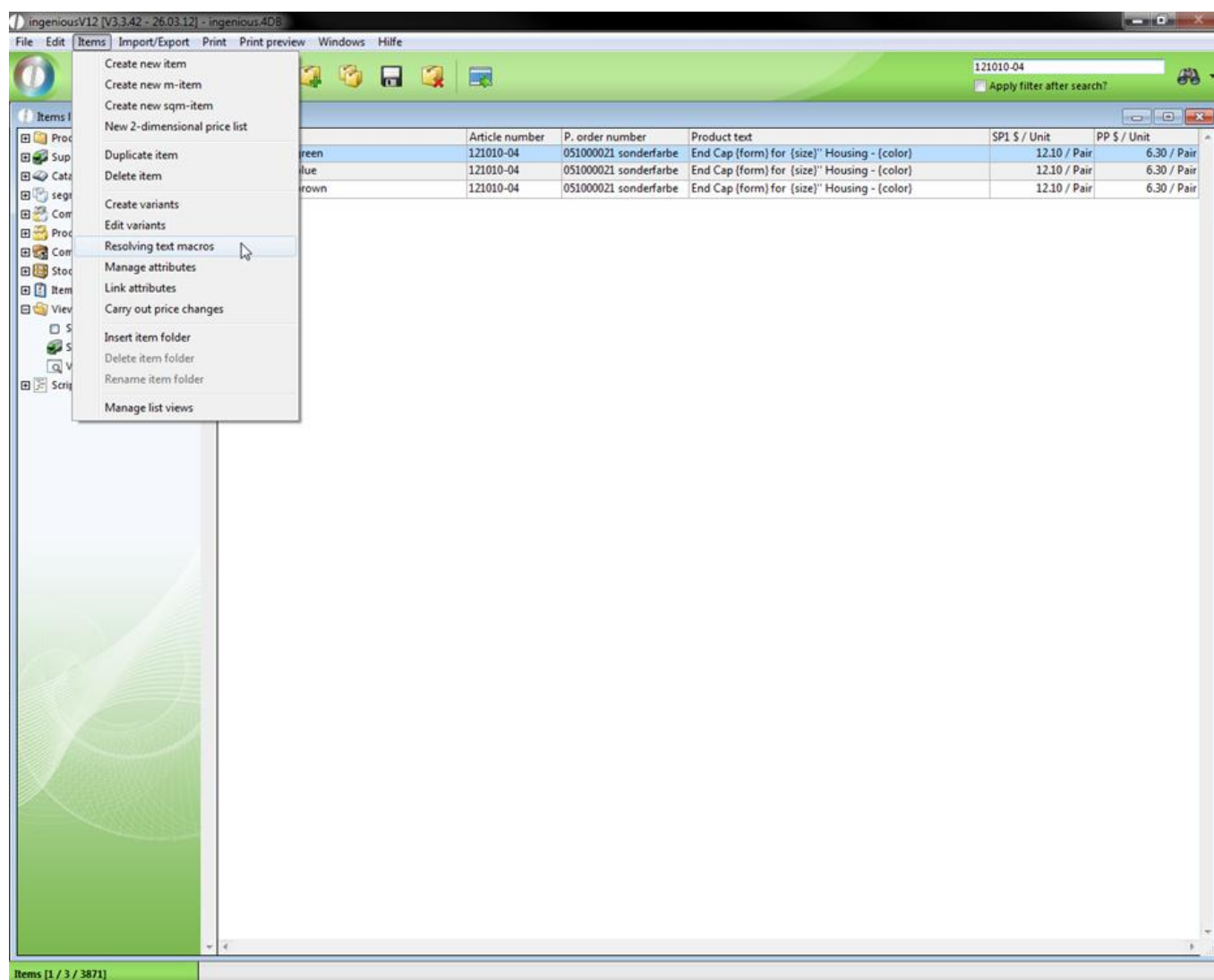
121010-04
Apply filter after search?

Items list view [1 / 3 / 3871]

Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
End Cap 90° 4, green	121010-04	051000021 sonderfarbe	End Cap (form) for {size}" Housing - {color}	12.10 / Pair	6.30 / Pair
End Cap 90° 4, blue	121010-04	051000021 sonderfarbe	End Cap (form) for {size}" Housing - {color}	12.10 / Pair	6.30 / Pair
End Cap 90° 4, brown	121010-04	051000021 sonderfarbe	End Cap (form) for {size}" Housing - {color}	12.10 / Pair	6.30 / Pair

Items [1 / 3 / 3871]

8. In order to provide the placeholder as ASCII text, click in the menu on "Resolving text macros".



The screenshot shows the 'ingenious.V12' application window. The title bar indicates the version is V3.3.42 - 26.03.12. The menu bar includes File, Edit, Items, Import/Export, Print, Print preview, Windows, and Hilfe. The toolbar contains various icons for file operations and navigation. The main window is titled 'Items list view [1 / 3 / 3871]'. On the left is a tree view with categories like Product catalogue, Supplier, Catalogue supplier, segment group, Commodity group, Product group, Commission group, Stock, Item status, View filter, Summarize catalogue, Supplier: [No filter], View: [Items], and Scripts. The main area displays a table with the following data:

Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
End Cap 90° 4, blue	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - blue	12.10 / Pair	6.30 / Pair
End Cap 90° 4, brown	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - brown	12.10 / Pair	6.30 / Pair
End Cap 90° 4, green	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - green	12.10 / Pair	6.30 / Pair

The status bar at the bottom shows 'Items [1 / 3 / 3871]'.

9. Switch in the detail view from one of the two newly created variants and control whether the settings of the original file should be transferred. You can now, if necessary, change the item number, order number, etc. of the record.

Practice editing item variants

1. In the detail view, change the record from which the variants were generated. Change then to the record, "End Cap 90° 4", brown"
2. In the column, "Parameter", select and change the listing in the area, "Directory" to "Product A".

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File Edit Items Import/Export Print Print preview Windows Hilfe

121010-04
Apply filter after search?

Items detail view [End Cap 90° 4, brown - 121010-04]

Product texts
Parameter
Product picture
Accessories
own fields
File attachments
Stock monitor
Orderparameters
Cuttingoptimization
Prices
SP 1
SP 2
PP
Webshop
Categories
Webshop Sync. Log

Manufacturing
Item in part list
Item in packing list
Default measurement sheet


Item status
☒ Sales product ☒ Purchase order item ☐ Item disabled ☒ XML Supplier export
☐ Order filling ☐ Cuttingoptimization ☐ Multi suppliers ☐ Multi-lingual product

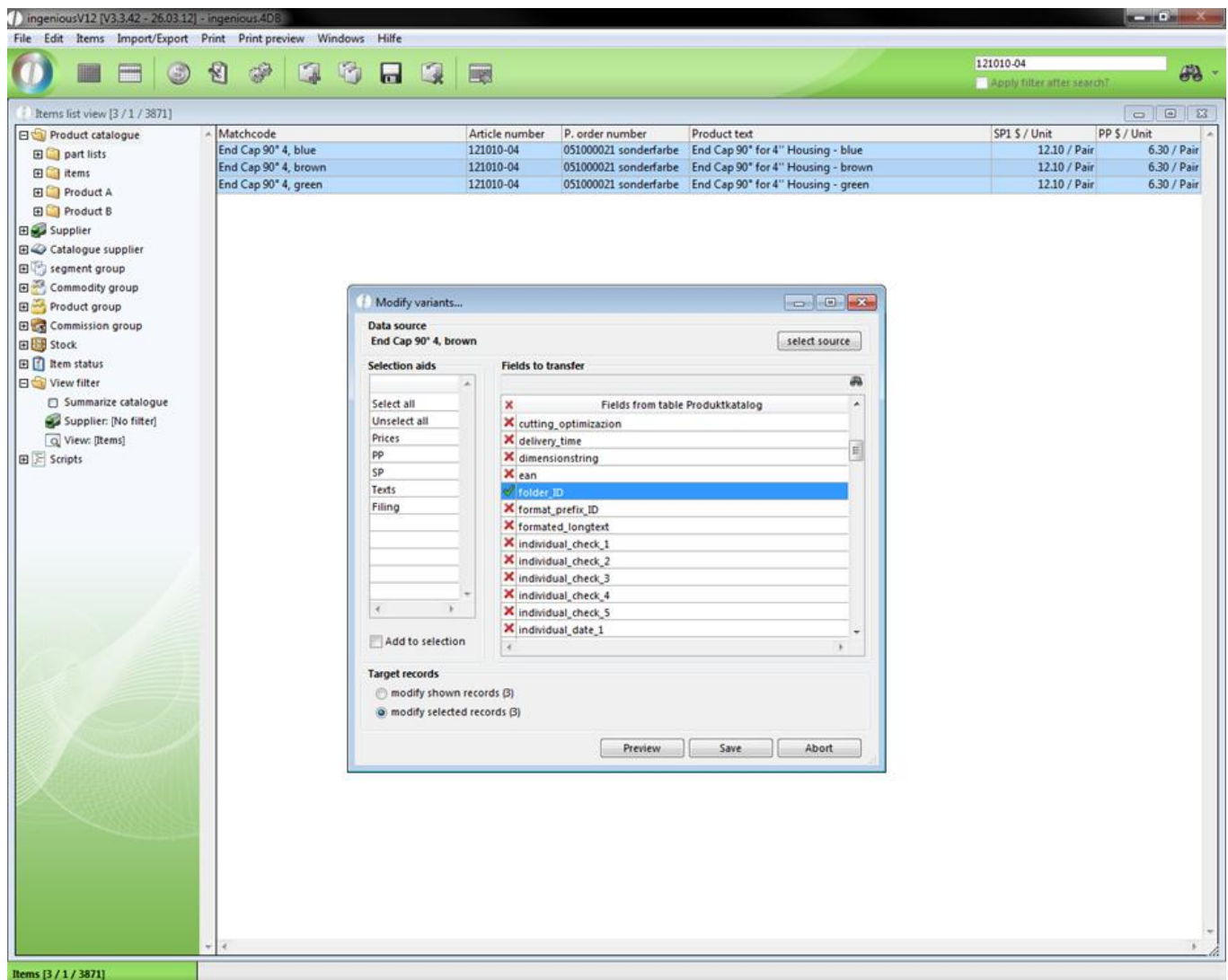
Rental/Serial numbers
☐ Rental product ☐ Serial number liability **Serial no.**

Finance account
Proceeds account with s. ta
VAT rate Full VAT rate
Proc. account with s. tax (abro.)
Cost centre

Classification
Directory Product A Selection
Supplier
Catalogue End Caps Page 45
Segment group
Commodity group
Product group BulkMaterial
Price comparison group
Commission group

[End Cap 90° 4, brown] - [121010-04]

3. Save the change with the  button and go back to the list view.
 4. Leave the file highlighted and select "Edit item/Variants".
- A new window opens to edit the variants.



5. From the area, "Fields to be transferred", select the entry, "Folder ID". The entry has to be tagged with the green checkmark.

6. Click on the "Accept" button in order to assign the file "Product A" in the product catalogue to all variants derived from this record, as a folder.

Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
1 Cha. Remote Wall Mount Transmitter - cream	100100-10	45123	1 Channel Remote Wall Mount Transmitter - cream	10.20 / PC	7.60 / PC
Crank Handle 11.9	6406-HAND-02-AI		Handle for Universal with 11.9mm Pivot H-46"	218.50 / PC	28.72 / PC
End Cap 90° 4, blue	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - blue	12.10 / Pair	6.30 / Pair
End Cap 90° 4, brown	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - brown	12.10 / Pair	6.30 / Pair
End Cap 90° 4, green	121010-04	051000021 sonderfarbe	End Cap 90° for 4" Housing - green	12.10 / Pair	6.30 / Pair

You have just shifted the items from the product catalog into the file "Product A". In this way ("Items / Edit Variants") you can transfer the characteristics at any time from the "Original record" to the derived data records (variants).

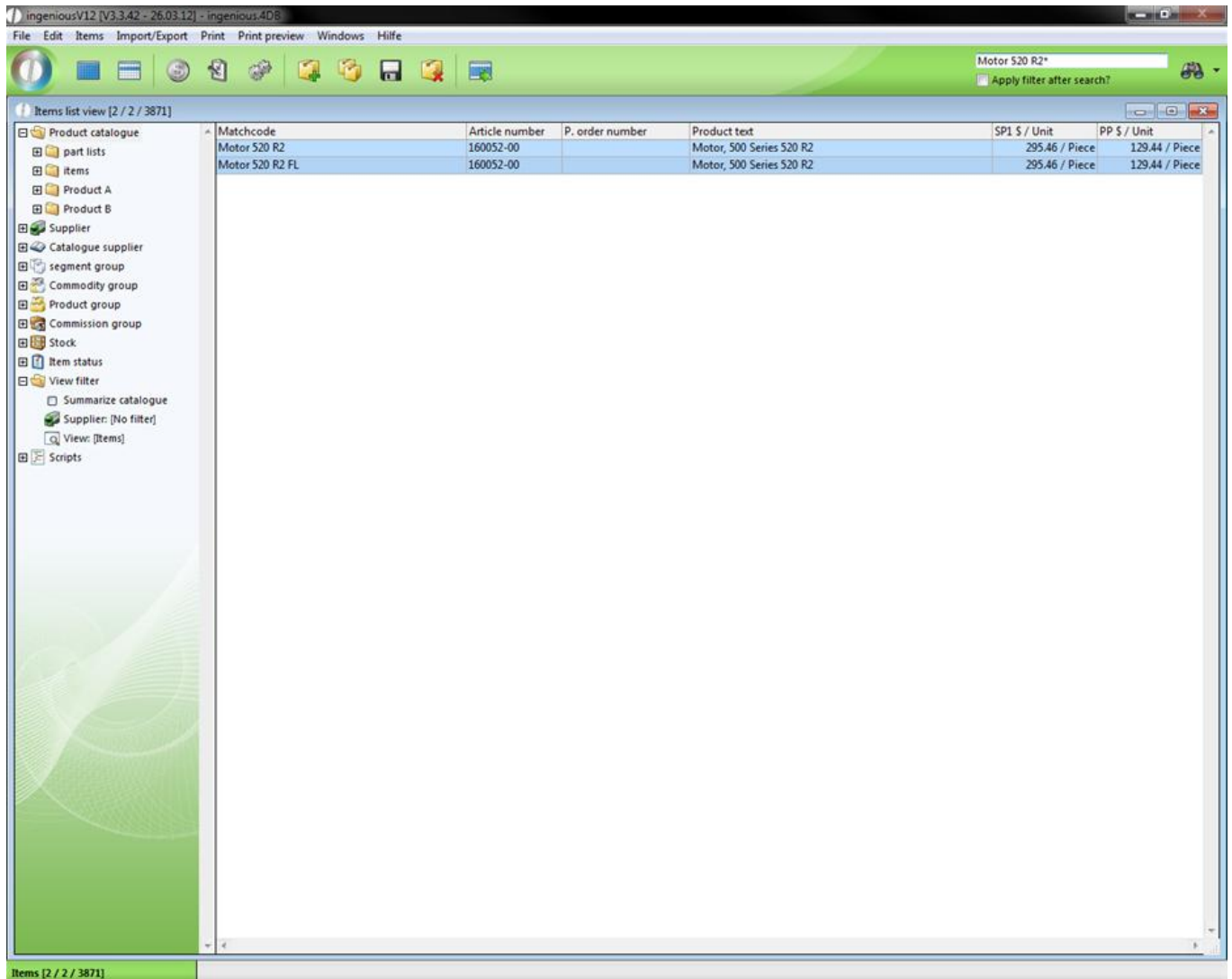
3.2.1.7 Executing price changes

In order to give a new price to only one item, it is important to do this directly in the detail view of the item. In the column SP 1, SP 2 or PP, simply enter the new price and save the changes. But price adjustments of several items will be child's play in Ingenious.V12, owing to the function, "Execute Price Changes". Simply open and highlight the desired items and implement the menu item, "Execute item/Price Changes", enter the price adjustment, finished! It is nearly just as easy to execute the price adjustments with two-dimensional price lists (price matrixes). In each case, an example exercise follows.

Practice adjusting prices of multiple items

When making a price adjustment for multiple items, you should use the function, "Execute price change".

1. Search for "Motor 520 R2*" and select the items.



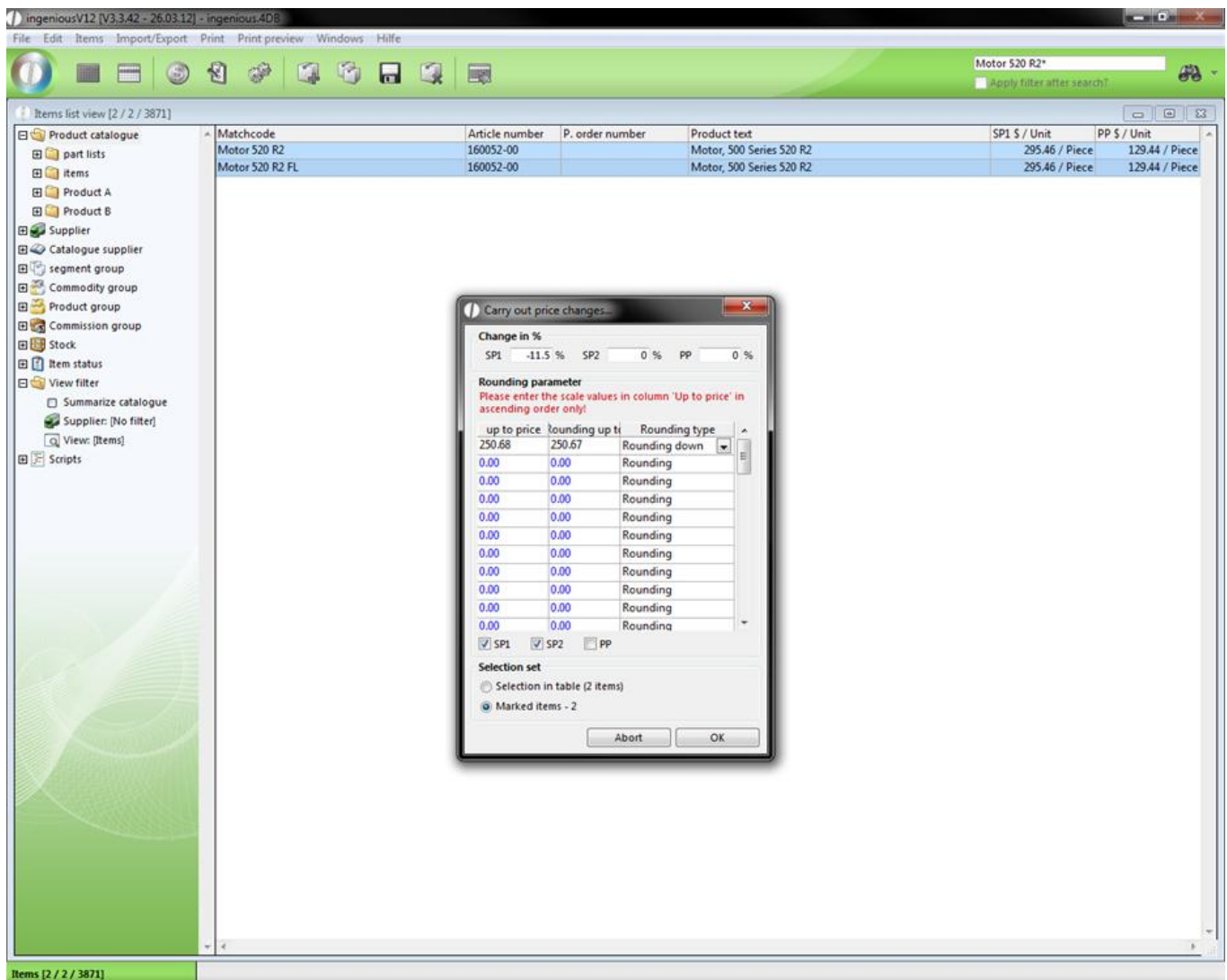
2. Select the menu item "Items / Execute Price Change"

A window for the entry of the price change appears. Here you can select which price (SP 1, SP 2, PP) you want to raise or reduce at which percent.

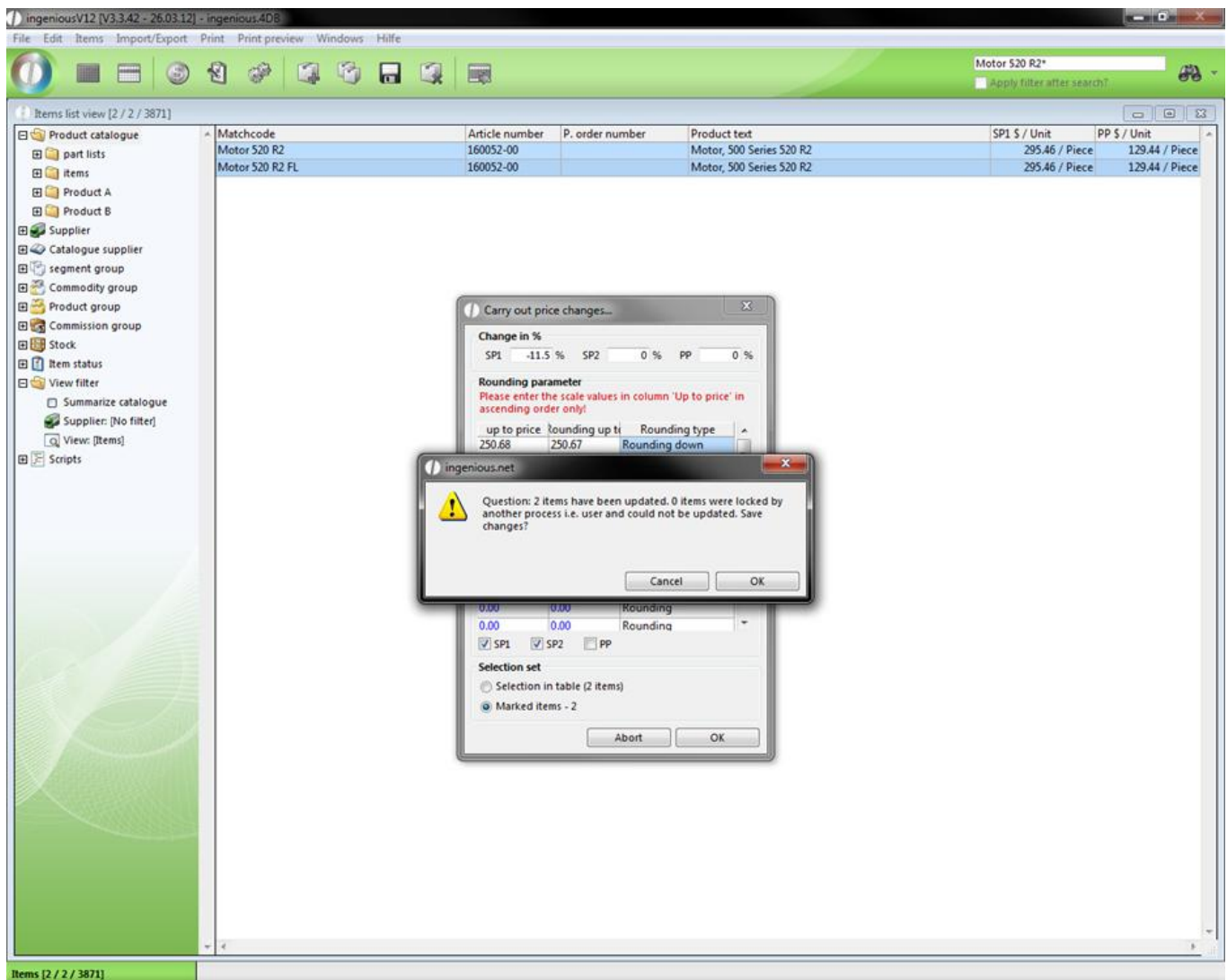
3. In the SP 1 field in the area, "Raise in %", enter a -11.5. You thereby reduce the current sales price of the item by 11.5 percent.

Attention: If you want to raise the prices, you must enter 11.5 (without the minus), for example.

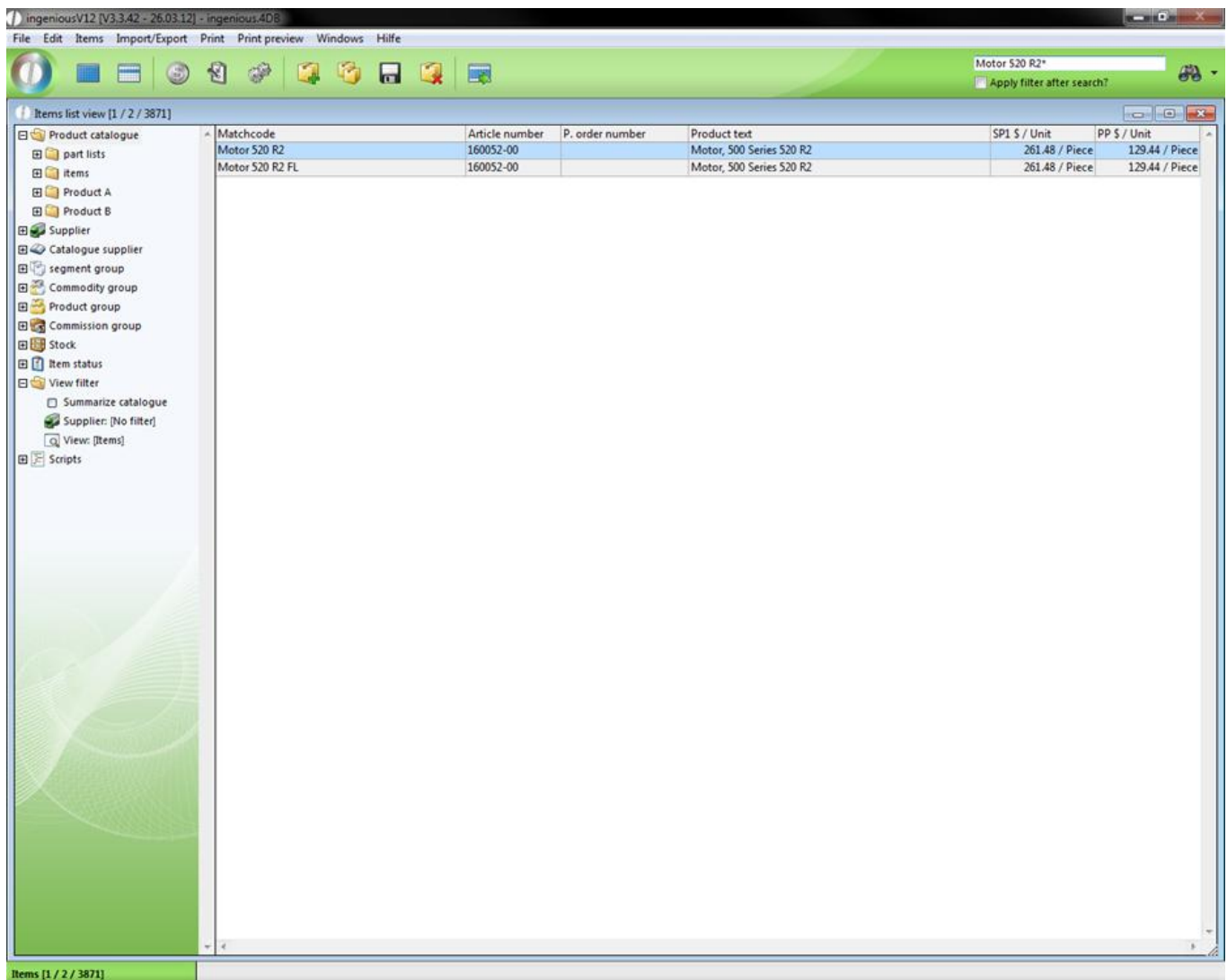
4. You want to specify the rounding rules for your prices yourself. Thus click on the area, "Rounding Parameter" on the first cell in the column, "Up to price". Since your current SP 1 lies at 442.68 \$, it will be at 442.67 \$ after the price reduction. Enter the value "442.68" in the first cell of the "up to price" column and the value "442.67" in the second. In the third column, you can select one of three options from a pop-up window ("bus. Rounding" "Round up" and "Round down"). Select the option "Round off" here.



5. Click on the "OK" button in order to execute the price change and confirm the inquiry window that appears.



As requested by you, the price of the item is now reduced to 442,67 \$ by 11.5 percent.



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File Edit Items Import/Export Print Print preview Windows Hilfe

Motor 520 R2*

☐ Apply filter after search?

Items list view [1 / 2 / 3871]

Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Motor 520 R2	160052-00		Motor, 500 Series 520 R2	261.48 / Piece	129.44 / Piece
Motor 520 R2 FL	160052-00		Motor, 500 Series 520 R2	261.48 / Piece	129.44 / Piece

Product catalogue

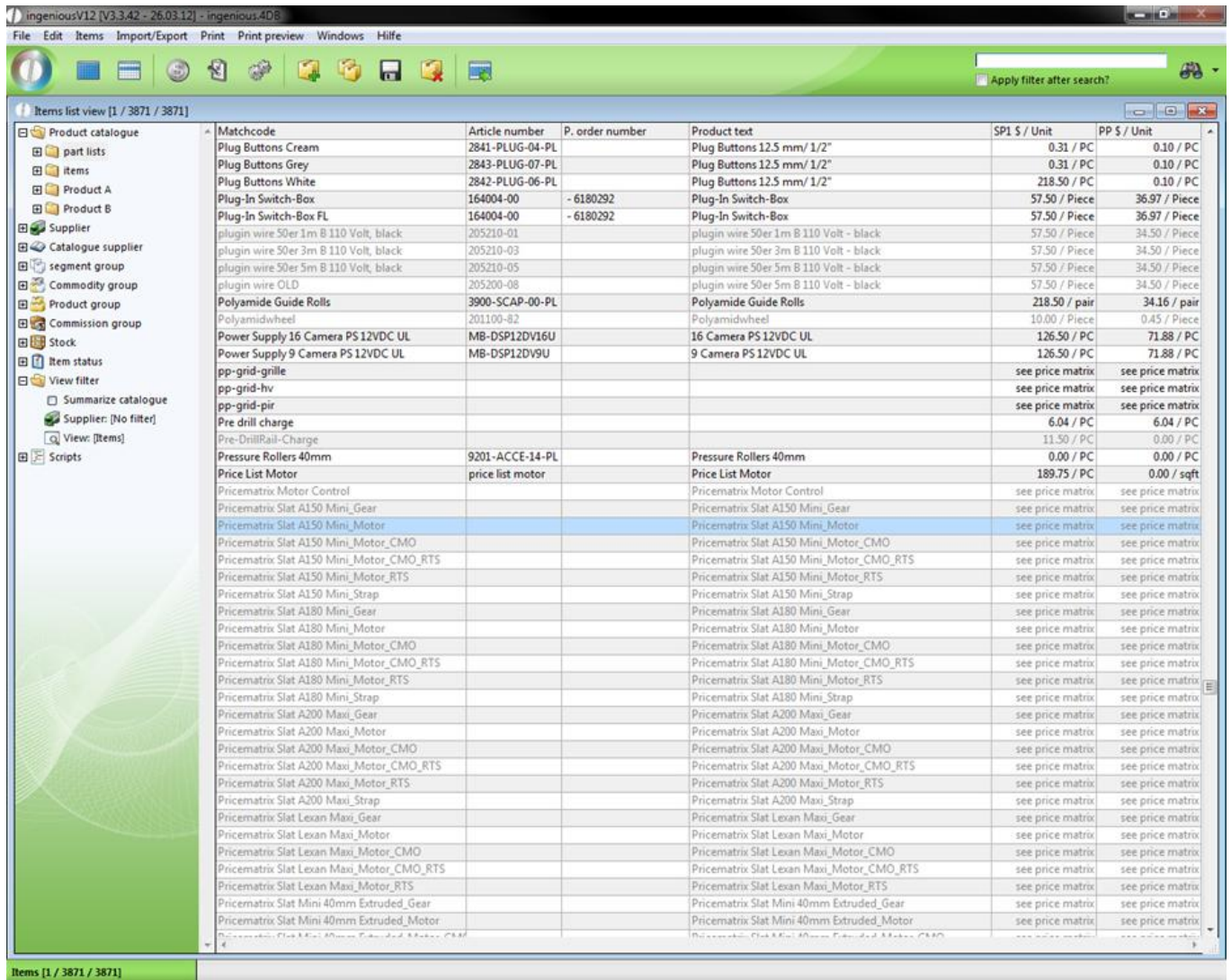
- part lists
- items
- Product A
- Product B
- Supplier
- Catalogue supplier
- segment group
- Commodity group
- Product group
- Commission group
- Stock
- Item status
- View filter
 - ☐ Summarize catalogue
 - ☒ Supplier: [No filter]
 - ☒ View: [Items]
- Scripts

Items [1 / 2 / 3871]


Practice price adjustments with a 2-dimensional price list

The price adjustments of a 2-dimensional price list are almost as easy as that of a single item. In this exercise, you should raise the prices of the SP 1 by 1.2 percent.

1. Open the detailed view of the imaginative item with the matchcode "Pricematrix Slat A150 Mini_Motor"



Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Plug Buttons Cream	2841-PLUG-04-PL		Plug Buttons 12.5 mm/ 1/2"	0.31 / PC	0.10 / PC
Plug Buttons Grey	2843-PLUG-07-PL		Plug Buttons 12.5 mm/ 1/2"	0.31 / PC	0.10 / PC
Plug Buttons White	2842-PLUG-06-PL		Plug Buttons 12.5 mm/ 1/2"	218.50 / PC	0.10 / PC
Plug-In Switch-Box	164004-00	- 6180292	Plug-In Switch-Box	57.50 / Piece	36.97 / Piece
Plug-In Switch-Box FL	164004-00	- 6180292	Plug-In Switch-Box	57.50 / Piece	36.97 / Piece
plugin wire 50er 1m B 110 Volt, black	205210-01		plugin wire 50er 1m B 110 Volt - black	57.50 / Piece	34.50 / Piece
plugin wire 50er 3m B 110 Volt, black	205210-03		plugin wire 50er 3m B 110 Volt - black	57.50 / Piece	34.50 / Piece
plugin wire 50er 5m B 110 Volt, black	205210-05		plugin wire 50er 5m B 110 Volt - black	57.50 / Piece	34.50 / Piece
plugin wire OLD	205200-08		plugin wire 50er 5m B 110 Volt - black	57.50 / Piece	34.50 / Piece
Polyamide Guide Rolls	3900-SCAP-00-PL		Polyamide Guide Rolls	218.50 / pair	34.16 / pair
Polyamidwheel	201100-82		Polyamidwheel	10.00 / Piece	0.45 / Piece
Power Supply 16 Camera PS 12VDC UL	MB-DSP12DV16U		16 Camera PS 12VDC UL	126.50 / PC	71.88 / PC
Power Supply 9 Camera PS 12VDC UL	MB-DSP12DV9U		9 Camera PS 12VDC UL	126.50 / PC	71.88 / PC
pp-grid-grille				see price matrix	see price matrix
pp-grid-hv				see price matrix	see price matrix
pp-grid-pir				see price matrix	see price matrix
Pre drill charge				6.04 / PC	6.04 / PC
Pre-DrillRail-Charge				11.50 / PC	0.00 / PC
Pressure Rollers 40mm	9201-ACCE-14-PL		Pressure Rollers 40mm	0.00 / PC	0.00 / PC
Price List Motor	price list motor		Price List Motor	189.75 / PC	0.00 / sqft
Pricematrix Motor Control			Pricematrix Motor Control	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Gear			Pricematrix Slat A150 Mini_Gear	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Motor			Pricematrix Slat A150 Mini_Motor	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Motor_CMO			Pricematrix Slat A150 Mini_Motor_CMO	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Motor_CMO_RTS			Pricematrix Slat A150 Mini_Motor_CMO_RTS	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Motor_RTS			Pricematrix Slat A150 Mini_Motor_RTS	see price matrix	see price matrix
Pricematrix Slat A150 Mini_Strap			Pricematrix Slat A150 Mini_Strap	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Gear			Pricematrix Slat A180 Mini_Gear	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Motor			Pricematrix Slat A180 Mini_Motor	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Motor_CMO			Pricematrix Slat A180 Mini_Motor_CMO	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Motor_CMO_RTS			Pricematrix Slat A180 Mini_Motor_CMO_RTS	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Motor_RTS			Pricematrix Slat A180 Mini_Motor_RTS	see price matrix	see price matrix
Pricematrix Slat A180 Mini_Strap			Pricematrix Slat A180 Mini_Strap	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Gear			Pricematrix Slat A200 Maxi_Gear	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Motor			Pricematrix Slat A200 Maxi_Motor	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Motor_CMO			Pricematrix Slat A200 Maxi_Motor_CMO	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Motor_CMO_RTS			Pricematrix Slat A200 Maxi_Motor_CMO_RTS	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Motor_RTS			Pricematrix Slat A200 Maxi_Motor_RTS	see price matrix	see price matrix
Pricematrix Slat A200 Maxi_Strap			Pricematrix Slat A200 Maxi_Strap	see price matrix	see price matrix
Pricematrix Slat Lexan Maxi_Gear			Pricematrix Slat Lexan Maxi_Gear	see price matrix	see price matrix
Pricematrix Slat Lexan Maxi_Motor			Pricematrix Slat Lexan Maxi_Motor	see price matrix	see price matrix
Pricematrix Slat Lexan Maxi_Motor_CMO			Pricematrix Slat Lexan Maxi_Motor_CMO	see price matrix	see price matrix
Pricematrix Slat Lexan Maxi_Motor_CMO_RTS			Pricematrix Slat Lexan Maxi_Motor_CMO_RTS	see price matrix	see price matrix
Pricematrix Slat Lexan Maxi_Motor_RTS			Pricematrix Slat Lexan Maxi_Motor_RTS	see price matrix	see price matrix
Pricematrix Slat Mini 40mm Extruded_Gear			Pricematrix Slat Mini 40mm Extruded_Gear	see price matrix	see price matrix
Pricematrix Slat Mini 40mm Extruded_Motor			Pricematrix Slat Mini 40mm Extruded_Motor	see price matrix	see price matrix

2. Switch to the column, "PP" and click on the  button.

3. In the input field, enter the value 1.2 and choose the entry "Add% (from 100)".

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Items Import/Export Print Print preview Windows Hilfe

Prices

Apply filter after search?

Items detail view [Pricematrix Slat A150 Mini_Motor]

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	C
1	24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114	
2	24	735.74	757.68	779.63	801.57	823.52	845.46	867.41	889.35	910.14	932.09	954.03	975.98	997.92	1019.87	1041.81	1063.76
3	30	744.98	769.23	792.33	816.59	839.69	863.94	887.04	910.14	934.4	957.5	981.75	1004.85	1029.11	1052.21	1076.46	1099.56
4	36	756.53	783.09	808.5	835.07	860.48	887.04	912.45	939.02	964.43	990.99	1016.4	1042.97	1068.38	1094.94	1120.35	1146.9
5	42	768.08	796.95	824.67	853.55	881.27	910.14	937.86	966.74	995.61	1023.33	1052.21	1079.93	1108.8	1136.52	1165.4	1193.1
6	48	779.63	810.81	840.84	872.03	903.21	933.24	964.43	994.46	1025.64	1055.67	1086.86	1116.89	1148.07	1179.26	1209.29	1240.47
7	54	791.18	824.67	857.01	890.51	924	956.34	989.84	1022.18	1055.67	1089.17	1121.51	1155	1188.5	1220.84	1254.33	1286.67
8	60	800.42	835.07	869.72	904.37	940.17	974.82	1009.47	1044.12	1079.93	1114.58	1149.23	1183.88	1218.53	1253.18	1287.83	1323.67
9	66	811.97	848.93	885.89	922.85	960.96	997.92	1034.88	1071.84	1109.96	1146.92	1183.88	1220.84	1258.95	1295.91	1332.87	1369.83
10	72	823.52	862.79	902.06	942.48	981.75	1021.02	1060.29	1100.72	1139.99	1179.26	1219.68	1258.95	1298.22	1337.49	1377.92	1417.15
11	78	851.24	893.97	936.71	979.44	1023.33	1066.07	1108.8	1151.54	1195.43	1238.16	1280.9	1323.63	1366.37	1409.1	1452.99	1495.7
12	84	861.63	907.83	952.88	997.92	1042.97	1089.17	1134.21	1179.26	1224.3	1270.5	1315.55	1360.59	1405.64	1451.84	1496.88	1541.9
13	90	874.34	921.69	969.05	1016.4	1064.91	1112.27	1159.62	1206.98	1255.49	1302.84	1350.2	1398.71	1446.06	1494.57	1541.93	1589.28
14	96	883.58	932.09	981.75	1031.42	1081.08	1130.75	1180.41	1229.92	1279.74	1328.25	1377.92	1427.58	1477.25	1526.91	1575.42	1625.06
15	102	913.61	970.2	1025.64	1082.24	1139.99	1195.43	1252.02	1308.62	1365.21	1421.81	1478.4	1533.84	1591.59	1648.19	1703.63	1760.27
16	108	924	984.06	1041.81	1100.72	1159.62	1219.68	1277.43	1336.34	1395.24	1454.15	1513.05	1571.96	1630.86	1689.77	1748.67	1807.58
17	114	936.71	997.92	1057.98	1119.2	1181.57	1242.78	1302.84	1364.06	1426.43	1487.64	1547.7	1608.92	1671.29	1732.5	1792.56	1853.78
18	120	948.26	1011.78	1074.15	1137.68	1202.36	1265.88	1329.41	1392.93	1456.46	1519.98	1583.51	1647.03	1710.56	1774.08	1837.61	1901.13
19	126	957.5	1022.18	1088.01	1152.69	1218.53	1284.36	1349.04	1413.72	1479.56	1545.39	1610.07	1675.91	1741.74	1806.42	1872.26	1936.94
20	132	969.05	1036.04	1104.18						1510.74	1577.73	1645.88	1712.87	1781.01	1849.16	1916.15	1984.29
21	138	980.6	1049.9	1120.35						1540.77	1611.23	1680.53	1750.98	1821.44	1890.74	1961.19	2030.48
22	144	992.15	1063.76	1136.52						1570.8	1643.57	1715.18	1787.94	1860.71	1933.47	2005.08	2077.85
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Price per unit 1 sqft Conversion

[Pricematrix Slat A150 Mini_Motor]

2-dimensional price list before the price increase

4. Click on "Calculate" to start the action. The 2-dimensional price list looks as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	C
1		24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114
2	24	753.5	775.97	798.46	820.92	843.4	865.88	888.35	910.82	932.11	954.6	977.07	999.54	1022.02	1044.5	1066.96	1089.45
3	30	762.97	787.8	811.46	836.31	859.97	884.8	908.45	932.11	956.96	980.62	1005.45	1029.11	1053.96	1077.62	1102.45	1126.3
4	36	774.8	802	828.02	855.23	881.26	908.45	934.48	961.69	987.71	1014.91	1040.94	1068.16	1094.17	1121.38	1147.4	1174.61
5	42	786.63	816.19	844.58	874.16	902.55	932.11	960.5	990.08	1019.65	1048.04	1077.62	1106	1135.58	1163.96	1193.53	1221.9
6	48	798.46	830.39	861.14	893.08	925.02	955.77	987.71	1018.47	1050.41	1081.16	1113.1	1143.85	1175.79	1207.73	1238.49	1270.4
7	54	810.28	844.58	877.7	912.01	946.31	979.43	1013.74	1046.86	1081.16	1115.47	1148.59	1182.89	1217.19	1250.32	1284.61	1317.74
8	60	819.75	855.23	890.72	926.2	962.87	998.36	1033.84	1069.33	1106	1141.49	1176.98	1212.47	1247.95	1283.44	1318.92	1355.56
9	66	831.57	869.43	907.28	945.13	984.16	1022.02	1059.87	1097.72	1136.76	1174.61	1212.47	1250.32	1289.35	1327.2	1365.05	1402.91
10	72	843.4	883.62	923.83	965.24	1005.45	1045.67	1085.89	1127.3	1167.51	1207.73	1249.13	1289.35	1329.57	1369.78	1411.19	1451.41
11	78	871.79	915.56	959.33	1003.08	1048.04	1091.81	1135.58	1179.34	1224.3	1268.06	1311.83	1355.58	1399.36	1443.12	1488.08	1531.84
12	84	882.43	929.74	975.88	1022.02	1068.16	1115.47	1161.59	1207.73	1253.86	1301.18	1347.32	1393.44	1439.58	1486.89	1533.02	1579.16
13	90	895.45	943.94	992.45	1040.94	1090.62	1139.13	1187.62	1236.12	1285.81	1334.29	1382.8	1432.48	1480.97	1530.65	1579.16	1627.65
14	96	904.91	954.6	1005.45	1056.33	1107.18	1158.05	1208.9	1258.59	1310.64	1360.32	1411.19	1462.05	1512.92	1563.77	1613.46	1664.3
15	102	935.66	993.62	1050.41	1108.37	1167.51	1224.3	1282.24	1340.21	1398.17	1456.14	1514.09	1570.88	1630.02	1687.99	1744.76	1802.7
16	108	946.31	1007.82	1066.96	1127.3	1187.62	1249.13	1308.27	1368.61	1428.92	1489.26	1549.58	1609.91	1670.24	1730.57	1790.89	1851.2
17	114	959.33	1022.02	1083.53	1146.22	1210.1	1272.78	1334.29	1397	1460.87	1523.56	1585.07	1647.77	1711.65	1774.33	1835.84	1898.54
18	120	971.16	1036.21	1100.08	1165.15	1231.39	1296.44	1361.5	1426.57	1491.63	1556.68	1621.74	1686.79	1751.86	1816.91	1881.98	1947.03
19	126	980.62	1046.86	1114.28	1180.52	1247.95	1315.37	1381.61	1447.85	1515.28	1582.7	1648.94	1716.37	1783.79	1850.04	1917.47	1983.3
20	132	992.45	1061.05	1130.84	1199.44	1269.24	1339.03	1407.63	1477.43	1547.22	1615.82	1685.62	1754.22	1824.01	1893.81	1962.41	2032.2
21	138	1004.28	1075.25	1147.4	1218.38	1290.53	1362.69	1433.66	1505.82	1577.97	1650.13	1721.11	1793.25	1865.42	1936.39	2008.54	2079.5
22	144	1016.11	1089.45	1163.96	1237.3	1311.83	1386.34	1459.68	1534.21	1608.73	1683.25	1756.59	1831.11	1905.64	1980.15	2053.49	2128.01
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Price per unit: 1 sqft Conversion

Note: Other calculation functions are of course also available to you.

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File Edit Items Import/Export Print Print preview Windows Hilfe

Prices

Apply filter after search?

Items detail view [Pricematrix Slat A150 Mini_Motor]

Product texts
Parameter
Product picture
Accessories
own fields
File attachments
Stock monitor
Orderparameters
Cuttingoptimization
Prices
SP 1
SP 2
PP
Webshop
Categories
Webshop Sync. Log

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114	120
2	24	753.5	775.97	798.46	820.92	843.4	865.88	888.35	910.82	932.11	954.6	977.07	999.54	1022.02	1044.5	1066.96	1089.45
3	30	762.97	787.8	811.46	836.31	859.97	884.8	908.45	932.11	956.96	980.62	1005.45	1029.11	1053.96	1077.62	1102.45	1126.3
4	36	774.8	802	828.02	855.23	881.26	908.45	934.48	961.69	987.71	1014.91	1040.94	1068.16	1094.17	1121.38	1147.4	1174.61
5	42	786.63	816.19	844.58	874.16	902.55	932.11	960.5	990.08	1019.65	1048.04	1077.62	1106	1135.58	1163.96	1193.53	1221.9
6	48	798.46	830.39	861.14	893.08	925.02	955.77	987.71	1018.47	1050.41	1081.16	1113.1	1143.85	1175.79	1207.73	1238.49	1270.4
7	54	810.28	844.58	877.7	912.01	946.31	979.43	1013.74	1046.86	1081.16	1115.47	1148.59	1182.89	1217.19	1250.32	1284.61	1317.74
8	60	819.75	855.23	890.72	926.2	962.87	998.36	1033.84	1069.33	1106	1141.49	1176.98	1212.47	1247.95	1283.44	1318.92	1355.56
9	66	831.57	869.43	907.28	945.13	984.16	1022.02	1059.87	1097.72	1136.76	1174.61	1212.47	1250.32	1289.35	1327.2	1365.05	1402.91
10	72	843.4	883.62	923.83	965.24	1005.45	1045.67	1085.89	1127.3	1167.51	1207.73	1249.13	1289.35	1329.57	1369.78	1411.19	1451.41
11	78	871.79	915.56	959.33	1003.08	1048.04	1091.81	1135.58	1179.34	1224.3	1268.06	1311.83	1355.58	1399.36	1443.12	1488.08	1531.84
12	84	882.43	929.74	975.88	1022.02	1068.16	1115.47	1161.59	1207.73	1253.86	1301.18	1347.32	1393.44	1439.58	1486.89	1533.02	1579.16
13	90	895.45	943.94	992.45	1040.94	1090.62	1139.13	1187.62	1236.12	1285.81	1334.29	1382.8	1432.48	1480.97	1530.65	1579.16	1627.65
14	96	904.91	954.6	1005.45	1056.33	1107.18	1158.05	1208.9	1258.59	1310.64	1360.32	1411.19	1462.05	1512.92	1563.77	1613.46	1664.3
15	102	935.66	993.62	1050.41	1108.37	1167.51	1224.3	1282.24	1340.21	1398.17	1456.14	1514.09	1570.88	1630.02	1687.99	1744.76	1802.7
16	108	946.31	1007.82	1066.96	1127.3	1187.62	1249.13	1308.27	1368.61	1428.92	1489.26	1549.58	1609.91	1670.24	1730.57	1790.89	1851.2
17	114	959.33	1022.02	1083.53	1146.22	1210.1	1272.78	1334.29	1397	1460.87	1523.56	1585.07	1647.77	1711.65	1774.33	1835.84	1898.54
18	120	971.16	1036.21	1100.08	1165.15	1231.39	1296.44	1361.5	1426.57	1491.63	1556.68	1621.74	1686.79	1751.86	1816.91	1881.98	1947.03
19	126	980.62	1046.86	1114.28	1180.52	1247.95	1315.37	1381.61	1447.85	1515.28	1582.7	1648.94	1716.37	1783.79	1850.04	1917.47	1983.3
20	132	992.45	1061.05	1130.84						1547.22	1615.82	1685.62	1754.22	1824.01	1893.81	1962.41	2032.2
21	138	1004.28	1075.25	1147.4						1577.97	1650.13	1721.11	1793.25	1865.42	1936.39	2008.54	2079.5
22	144	1016.11	1089.45	1163.96						1608.73	1683.25	1756.59	1831.11	1905.64	1980.15	2053.49	2128.01
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Fill price matrix automatically

0.00

Assign value
Add value
Add value*X
Add value*Y
Add value*X*Y
Add %(of 100)
Rounding to the nearest cent/penny
Rounding up
Rounding down
Use service

Price per unit 1 sqft Conversion

[Pricematrix Slat A150 Mini_Motor]

5. If you want to determine the scale values again, simply enter the desired values in A1, e.g.: 100 (beginning values)/10 (steps/200 (final value).

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File Edit Items Import/Export Print Print preview Windows Hilfe

Prices

Apply filter after search?

Items detail view [Pricematrix Slat A150 Mini_Motor]


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	100/10/200	24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114
2	24	753.5	775.97	798.46	820.92	843.4	865.88	888.35	910.82	932.11	954.6	977.07	999.54	1022.02	1044.5	1066.96	1089.45
3	30	762.97	787.8	811.46	836.31	859.97	884.8	908.45	932.11	956.96	980.62	1005.45	1029.11	1053.96	1077.62	1102.45	1126.3
4	36	774.8	802	828.02	855.23	881.26	908.45	934.48	961.69	987.71	1014.91	1040.94	1068.16	1094.17	1121.38	1147.4	1174.61
5	42	786.63	816.19	844.58	874.16	902.55	932.11	960.5	990.08	1019.65	1048.04	1077.62	1106	1135.58	1163.96	1193.53	1221.9
6	48	798.46	830.39	861.14	893.08	925.02	955.77	987.71	1018.47	1050.41	1081.16	1113.1	1143.85	1175.79	1207.73	1238.49	1270.4
7	54	810.28	844.58	877.7	912.01	946.31	979.43	1013.74	1046.86	1081.16	1115.47	1148.59	1182.89	1217.19	1250.32	1284.61	1317.74
8	60	819.75	855.23	890.72	926.2	962.87	998.36	1033.84	1069.33	1106	1141.49	1176.98	1212.47	1247.95	1283.44	1318.92	1355.56
9	66	831.57	869.43	907.28	945.13	984.16	1022.02	1059.87	1097.72	1136.76	1174.61	1212.47	1250.32	1289.35	1327.2	1365.05	1402.91
10	72	843.4	883.62	923.83	965.24	1005.45	1045.67	1085.89	1127.3	1167.51	1207.73	1249.13	1289.35	1329.57	1369.78	1411.19	1451.41
11	78	871.79	915.56	959.33	1003.08	1048.04	1091.81	1135.58	1179.34	1224.3	1268.06	1311.83	1355.58	1399.36	1443.12	1488.08	1531.84
12	84	882.43	929.74	975.88	1022.02	1068.16	1115.47	1161.59	1207.73	1253.86	1301.18	1347.32	1393.44	1439.58	1486.89	1533.02	1579.16
13	90	895.45	943.94	992.45	1040.94	1090.62	1139.13	1187.62	1236.12	1285.81	1334.29	1382.8	1432.48	1480.97	1530.65	1579.16	1627.65
14	96	904.91	954.6	1005.45	1056.33	1107.18	1158.05	1208.9	1258.59	1310.64	1360.32	1411.19	1462.05	1512.92	1563.77	1613.46	1664.3
15	102	935.66	993.62	1050.41	1108.37	1167.51	1224.3	1282.24	1340.21	1398.17	1456.14	1514.09	1570.88	1630.02	1687.99	1744.76	1802.7
16	108	946.31	1007.82	1066.96	1127.3	1187.62	1249.13	1308.27	1368.61	1428.92	1489.26	1549.58	1609.91	1670.24	1730.57	1790.89	1851.2
17	114	959.33	1022.02	1083.53	1146.22	1210.1	1272.78	1334.29	1397	1460.87	1523.56	1585.07	1647.77	1711.65	1774.33	1835.84	1898.54
18	120	971.16	1036.21	1100.08	1165.15	1231.39	1296.44	1361.5	1426.57	1491.63	1556.68	1621.74	1686.79	1751.86	1816.91	1881.98	1947.03
19	126	980.62	1046.86	1114.28	1180.52	1247.95	1315.37	1381.61	1447.85	1515.28	1582.7	1648.94	1716.37	1783.79	1850.04	1917.47	1983.3
20	132	992.45	1061.05	1130.84	1199.44	1269.24	1339.03	1407.63	1477.43	1547.22	1615.82	1685.62	1754.22	1824.01	1893.81	1962.41	2032.2
21	138	1004.28	1075.25	1147.4	1218.38	1290.53	1362.69	1433.66	1505.82	1577.97	1650.13	1721.11	1793.25	1865.42	1936.39	2008.54	2079.5
22	144	1016.11	1089.45	1163.96	1237.3	1311.83	1386.34	1459.68	1534.21	1608.73	1683.25	1756.59	1831.11	1905.64	1980.15	2053.49	2128.01
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Price per unit 1 sqft Conversion

[Pricematrix Slat A150 Mini_Motor]

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1		100	110	120	130	140	150	160	170	180	190	200				
2	100	753.5	775.97	798.46	820.92	843.4	865.88	888.35	910.82	932.11	954.6	977.07				
3	110	762.97	787.8	811.46	836.31	859.97	884.8	908.45	932.11	956.96	980.62	1005.45				
4	120	774.8	802	828.02	855.23	881.26	908.45	934.48	961.69	987.71	1014.91	1040.94				
5	130	786.63	816.19	844.58	874.16	902.55	932.11	960.5	990.08	1019.65	1048.04	1077.62				
6	140	798.46	830.39	861.14	893.08	925.02	955.77	987.71	1018.47	1050.41	1081.16	1113.1				
7	150	810.28	844.58	877.7	912.01	946.31	979.43	1013.74	1046.86	1081.16	1115.47	1148.59				
8	160	819.75	855.23	890.72	926.2	962.87	998.36	1033.84	1069.33	1106	1141.49	1176.98				
9	170	831.57	869.43	907.28	945.13	984.16	1022.02	1059.87	1097.72	1136.76	1174.61	1212.47				
10	180	843.4	883.62	923.83	965.24	1005.45	1045.67	1085.89	1127.3	1167.51	1207.73	1249.13				
11	190	871.79	915.56	959.33	1003.08	1048.04	1091.81	1135.58	1179.34	1224.3	1268.06	1311.83				
12	200	882.43	929.74	975.88	1022.02	1068.16	1115.47	1161.59	1207.73	1253.86	1301.18	1347.32				
13																
14																
15																
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An especially interesting function which saves a lot of time is hidden behind the entry "Use Service" (a service is in Ingenious.V12 a product, e.g., shutter which exists of various individual parts and is produced in different variations).

6. Click on  and select the option, "Use Service". In the service area, enter "D-Kupa 7/37" and click on "Calculate".

The screenshot displays the ingenious.V12 software interface. The main window shows a spreadsheet titled 'Items detail view [Pricematrix Slat A150 Mini_Motor]'. The spreadsheet has columns labeled A through P and rows numbered 1 through 144. A dialog box titled 'Fill price matrix automatically' is open, showing a dropdown menu with 'Use service' selected, and buttons for 'Close' and 'Calculate'. The dialog box also shows a 'Service..' field with 'Accordion_HV_Price_Matrix' and a 'Custom' field. The spreadsheet data includes various numerical values, likely representing prices or costs, organized in a grid. The interface also includes a menu bar at the top with options like File, Edit, Items, Import/Export, Print, Print preview, Windows, and Hilfe. A toolbar with various icons is located below the menu bar. On the left side, there is a sidebar with a tree view containing categories like Product texts, Parameter, Product picture, Accessories, own fields, File attachments, Stock monitor, Orderparameters, Cutting optimization, Prices, SP 1, SP 2, PP, Webshop, Categories, and Webshop Sync. Log. At the bottom, there is a status bar showing 'Price per unit' and 'Conversion'.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114
2	24	735.74	757.68	779.63	801.57	823.52	845.46	867.41	889.35	910.14	932.09	954.03	975.98	997.92	1019.87	1041.81	1063.76
3	30	744.98	769.23	792.33	816.59	839.69	863.94	887.04	910.14	934.4	957.5	981.75	1004.85	1029.11	1052.21	1076.46	1099.56
4	36	756.53	783.09	808.5	835.07	860.48	887.04	912.45	939.02	964.43	990.99	1016.4	1042.97	1068.38	1094.94	1120.35	1146.91
5	42	768.08	796.95	824.67	853.55	881.27	910.14	937.86	966.74	995.61	1023.33	1052.21	1079.93	1108.8	1136.52	1165.4	1193.11
6	48	779.63	810.81	840.84	872.03	903.21	933.24	964.43	994.46	1025.64	1055.67	1086.86	1116.89	1148.07	1179.26	1209.29	1240.47
7	54	791.18	824.67	857.01	890.51	924	956.34	989.84	1022.18	1055.67	1089.17	1121.51	1155	1188.5	1220.84	1254.33	1286.67
8	60	800.42	835.07	869.72	904.37	940.17	974.82	1009.47	1044.12	1079.93	1114.58	1149.23	1183.88	1218.53	1253.18	1287.83	1323.61
9	66	811.97	848.93	885.89	922.85	960.96	997.92	1034.88	1071.84	1109.96	1146.92	1183.88	1220.84	1258.95	1295.91	1332.87	1369.83
10	72	823.52	862.79	902.06	942.48	981.75	1021.02	1060.29	1100.72	1139.99	1179.26	1219.68	1258.95	1298.22	1337.49	1377.92	1417.15
11	78	851.24	893.97	936.71	979.44	1023.33	1066.07	1108.8	1151.54	1195.43	1238.16	1280.9	1323.63	1366.37	1409.1	1452.99	1495.73
12	84	861.63	907.83	952.88	997.92	1042.97	1089.17	1134.21	1179.26	1224.3	1270.5	1315.55	1360.59	1405.64	1451.84	1496.88	1541.93
13	90	874.34	921.69	969.05	1016.4	1064.91	1112.27	1159.62	1206.98	1255.49	1302.84	1350.2	1398.71	1446.06	1494.57	1541.93	1589.28
14	96	883.58	932.09	981.75	1031.42	1081.08	1130.75	1180.41	1229.92	1279.74	1328.25	1377.92	1427.58	1477.25	1526.91	1575.42	1625.06
15	102	913.61	970.2	1025.64	1082.24	1139.99	1195.43	1252.02	1308.62	1365.21	1421.81	1478.4	1533.84	1591.59	1648.19	1703.63	1760.27
16	108	924	984.06	1041.81	1100.72	1159.62	1219.68	1277.43	1336.34	1395.24	1454.15	1513.05	1571.96	1630.86	1689.77	1748.67	1807.58
17	114	936.71	997.92	1057.98	1119.2	1181.57	1242.78	1302.84	1364.06	1426.43	1487.64	1547.7	1608.92	1671.29	1732.5	1792.56	1853.76
18	120	948.26	1011.78	1074.15	1137.68	1202.36	1265.88	1329.41	1392.93	1456.46	1519.98	1583.51	1647.03	1710.56	1774.08	1837.61	1901.13
19	126	957.5	1022.18	1088.01	1152.69	1218.53	1284.36	1349.04	1413.72	1479.56	1545.39	1610.07	1675.91	1741.74	1806.42	1872.26	1936.94
20	132	969.05	1036.04	1104.18						1510.74	1577.73	1645.88	1712.87	1781.01	1849.16	1916.15	1984.25
21	138	980.6	1049.9	1120.35						1540.77	1611.23	1680.53	1750.98	1821.44	1890.74	1961.19	2030.48
22	144	992.15	1063.76	1136.52						1570.8	1643.57	1715.18	1787.94	1860.71	1933.47	2005.08	2077.85



Ingenious.V12 will now calculate all necessary values

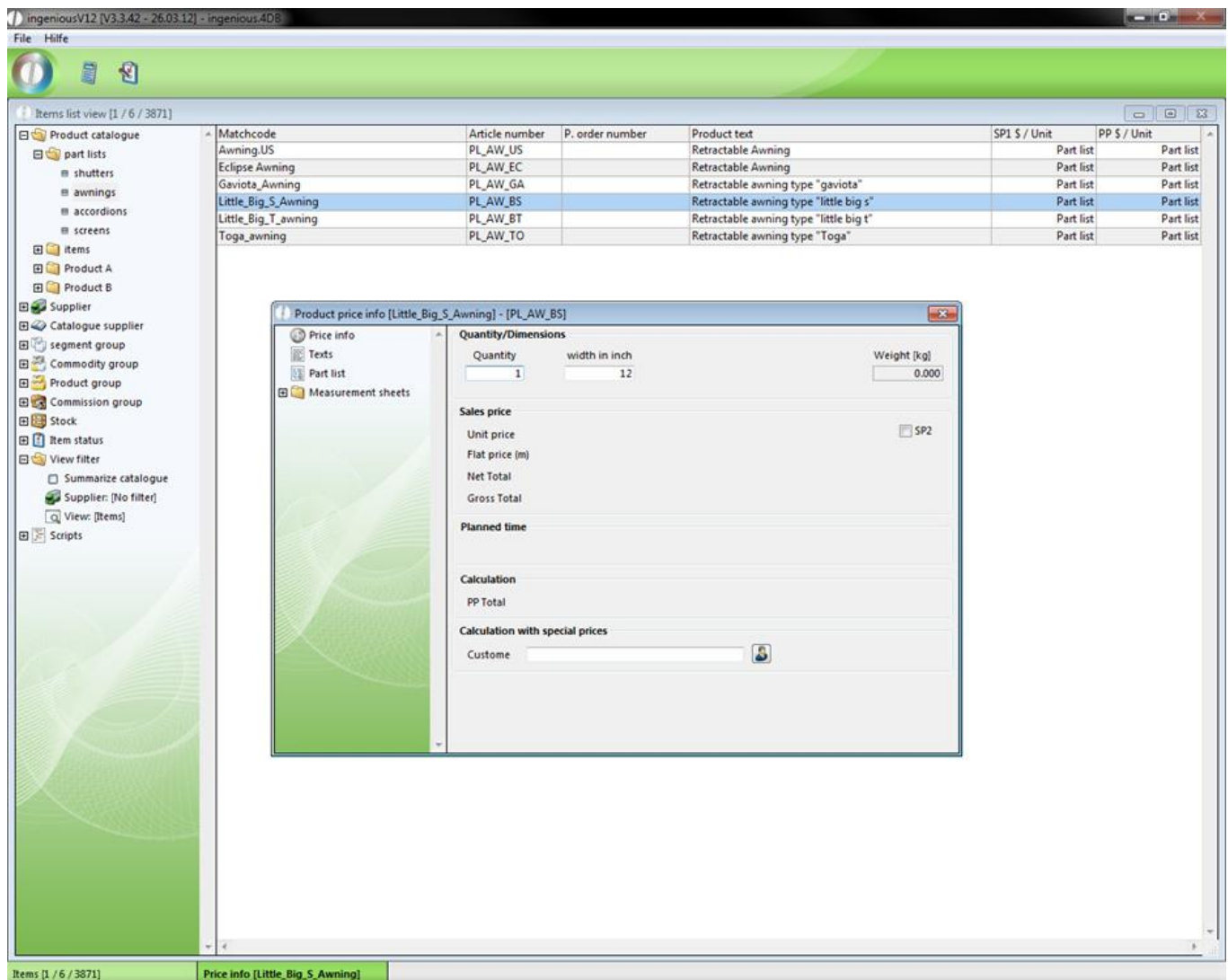
And will carry them over to the spreadsheet.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	C
1		24	30	36	42	48	54	60	66	72	78	84	90	96	102	108	114
2	24	279.6	279.6	279.6	279.6	310.8	343.2	375.6	406.8	439.2	470.4	502.8	535.2	566.4	598.8	631.2	662.4
3	30	324	324	324	324	360	397.2	433.2	470.4	507.6	543.6	580.8	616.8	654	691.2	727.2	764.4
4	36	367.2	367.2	367.2	367.2	409.2	451.2	492	534	574.8	616.8	658.8	699.6	741.6	782.4	824.4	866.4
5	42	411.6	411.6	411.6	411.6	458.4	504	550.8	597.6	643.2	690	735.6	782.4	829.2	874.8	921.6	967.2
6	48	456	456	456	456	507.6	558	609.6	660	711.6	763.2	813.6	865.2	915.6	967.2	1018.8	1069.2
7	54	500.4	500.4	500.4	500.4	556.8	612	668.4	723.6	780	835.2	891.6	948	1003.2	1059.6	1114.8	1171.2
8	60	544.8	544.8	544.8	544.8	604.8	666	727.2	787.2	848.4	908.4	969.6	1029.6	1090.8	1150.8	1212	1273.2
9	66	589.2	589.2	589.2	589.2	654	720	784.8	850.8	915.6	981.6	1047.6	1112.4	1178.4	1243.2	1309.2	1374
10	72	632.4	632.4	632.4	632.4	703.2	774	843.6	914.4	984	1054.8	1124.4	1195.2	1264.8	1335.6	1406.4	1476
11	78	676.8	676.8	676.8	676.8	752.4	826.8	902.4	978	1052.4	1128	1202.4	1278	1352.4	1428	1502.4	1578
12	84	721.2	721.2	721.2	721.2	801.6	880.8	961.2	1040.4	1120.8	1200	1280.4	1359.6	1440	1520.4	1599.6	1680
13	90	765.6	765.6	765.6	765.6	850.8	934.8	1020	1104	1189.2	1273.2	1358.4	1442.4	1527.6	1611.6	1696.8	1780.8
14	96	810	810	810	810	898.8	988.8	1077.6	1167.6	1256.4	1346.4	1435.2	1525.2	1615.2	1704	1794	1882.8
15	102	854.4	854.4	854.4	854.4	948	1042.8	1136.4	1231.2	1324.8	1419.6	1513.2	1608	1701.6	1796.4	1890	1984.8
16	108	898.8	898.8	898.8	898.8	997.2	1096.8	1195.2	1294.8	1393.2	1492.8	1591.2	1690.8	1789.2	1888.8	1987.2	2086.8
17	114	942	942	942	942	1046.4	1149.6	1254	1357.2	1461.6	1564.8	1669.2	1772.4	1876.8	1980	2084.4	2187.6
18	120	986.4	986.4	986.4	986.4	1095.6	1203.6	1312.8	1420.8	1530	1638	1747.2	1855.2	1964.4	2072.4	2181.6	2289.6
19	126	1030.8	1030.8	1030.8	1030.8	1144.8	1257.6	1370.4	1484.4	1597.2	1711.2	1824	1938	2050.8	2164.8	2277.6	2391.6
20	132	1075.2	1075.2	1075.2	1075.2	1192.8	1311.6	1429.2	1548	1665.6	1784.4	1902	2020.8	2138.4	2257.2	2374.8	2493.6
21	138	1119.6	1119.6	1119.6	1119.6	1242	1365.6	1488	1611.6	1734	1857.6	1980	2102.4	2226	2348.4	2472	2594.4
22	144	1164	1164	1164	1164	1291.2	1418.4	1546.8	1674	1802.4	1929.6	2058	2185.2	2313.6	2440.8	2569.2	2696.4
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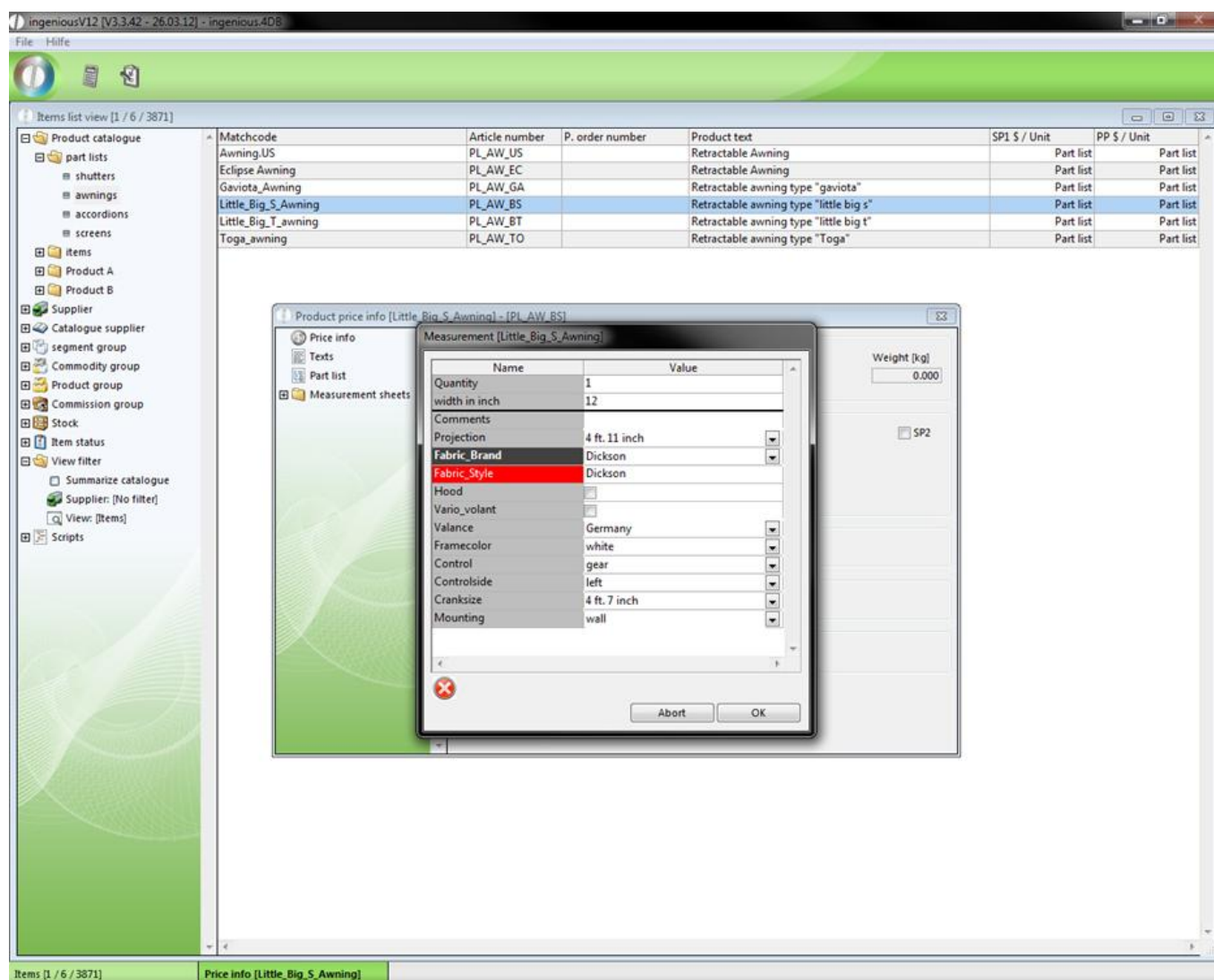
Price lists from Ingenious.V12 can be also copied. Highlight the desired cells and press the key combination Ctrl + C. You can now insert the copied cells into Ingenious.V12. You can do this for instance, in the sales price SP. Here click then on the cell A1 and insert the copied cells with Ctrl V.

3.2.1.8 Ad hoc pricing information

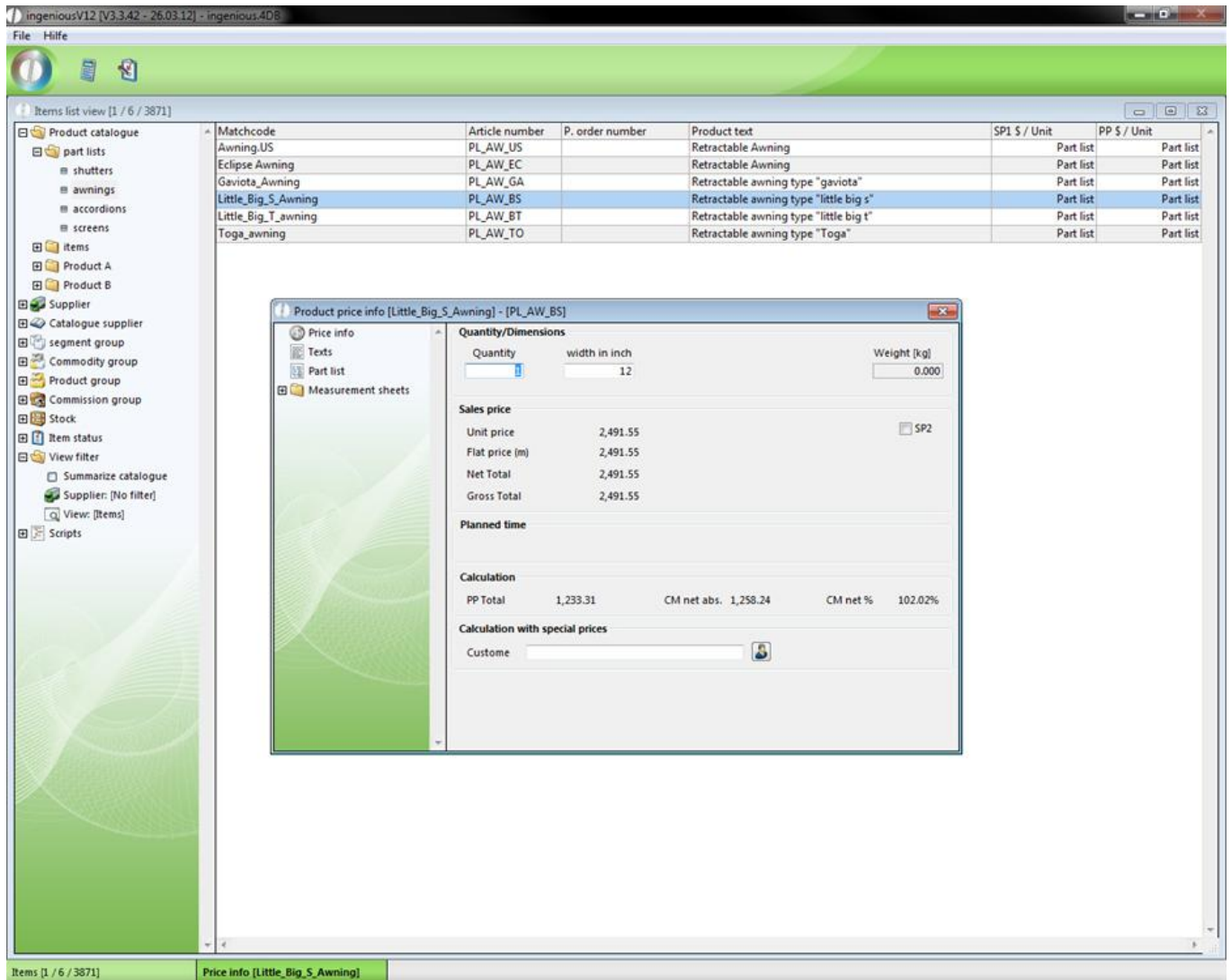
The "Add hoc" functionality is available to you for the quick calculation of the price information of meter items, square meter items and service items. With the  button, "Calculate price information about the Ad hoc item", Ingenious.V12 offers you all important information that allows you to be able to immediately give comprehensive information about the product to the contact in a phone inquiry. Here it is thus possible for instance to calculate the price information specific to a product of the current selected item, and to inform the contact of this. Also different versions (variants) or dimensions of the product can be arranged and calculated here. In order to be able to use these possibilities, it is sufficient to click on the  button, which is located in the icon bar of the lists – where the detail view of the module "items" is also located. In the start view of the following window, you will be in the most important column, "Price info".





Here you have an immediate overview of the most important data of this item in the areas, "Number/Dimensions", "Selling Price", "Planned time", "Calculation", and "Calculation with Special Prices". First you should enter the contact in the area, "Calculation with Special Prices" with the help of the  button or click first on the  button. If the item has basic data, they will now appear in the "Dimension" window. Here you can arrange the item according to the contact's request, and start the price calculation with the "OK" button.



Creation of the parts lists of the product



The calculated price of course contains optional contact discounts. This price applies however only to an item with the standard dimensions. This you can change in the column, "Price Info." with the entry fields in the area, "Number/Dimensions".

The new price calculation takes place again with the  button. However, the basic data no longer appears. In order to edit them again, the  button is at your disposal. The column, "Texts" contains the item texts created by Ingenious.V12 according to the basic data.

The screenshot displays the ingenious.V12 software interface. The main window shows a list of items with columns for Matchcode, Article number, P. order number, Product text, SP1 \$ / Unit, and PP \$ / Unit. The 'Little_Big_S_Awning' is selected. A detailed view window titled 'Product price info [Little_Big_S_Awning] - [PL_AW_BS]' is open, showing price information and a 3D model of the awning. The detailed view includes a 'Simple text (ASCII)' section with a description and a 'Formatted text (RTF)' section with a more detailed description and a 3D model. The status bar at the bottom indicates 'Items [1 / 6 / 3871]' and 'Price info [Little_Big_S_Awning]'.

Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Awning.US	PL_AW_US		Retractable Awning		Part list
Eclipse Awning	PL_AW_EC		Retractable Awning		Part list
Gaviota_Awning	PL_AW_GA		Retractable awning type "gaviota"		Part list
Little_Big_S_Awning	PL_AW_BS		Retractable awning type "little big s"		Part list
Little_Big_T_Awning	PL_AW_BT		Retractable awning type "little big t"		Part list
Toga_Awning	PL_AW_TO		Retractable awning type "Toga"		Part list

Product price info [Little_Big_S_Awning] - [PL_AW_BS]

Price info

Simple text (ASCII)

Retractable awning type "little big s" with 4 ft. 11 inch projection

- Fabric: Dickson Style: Dickson
- Valance: Germany
- Frame color: white
- Control: gear side: left

Formatted text (RTF)

Retractable awning type "little big s" with 4 ft. 11 inch projection

- Fabric: Dickson Style: Dickson
- Valance: Germany
- Frame color: white
- Control: gear side: left
- Mounting brackets: wall
- Cranksize 4 ft. 7 inch

Measurement width: 12 inch - projection: 4 ft. 11 inch

In addition, the RTF text provided is located in this column in the detail area of the item (possibly with pictures underneath). In the column, "Parts lists", the individual components of the item are listed in spreadsheet form.

The screenshot displays the ingenious.V12 software interface. The main window shows a list of items under the 'Items list view [1 / 6 / 3871]' tab. The list includes columns for Matchcode, Article number, P. order number, Product text, SP1 \$ / Unit, and PP \$ / Unit. The 'Little_Big_S_Awning' item is selected.

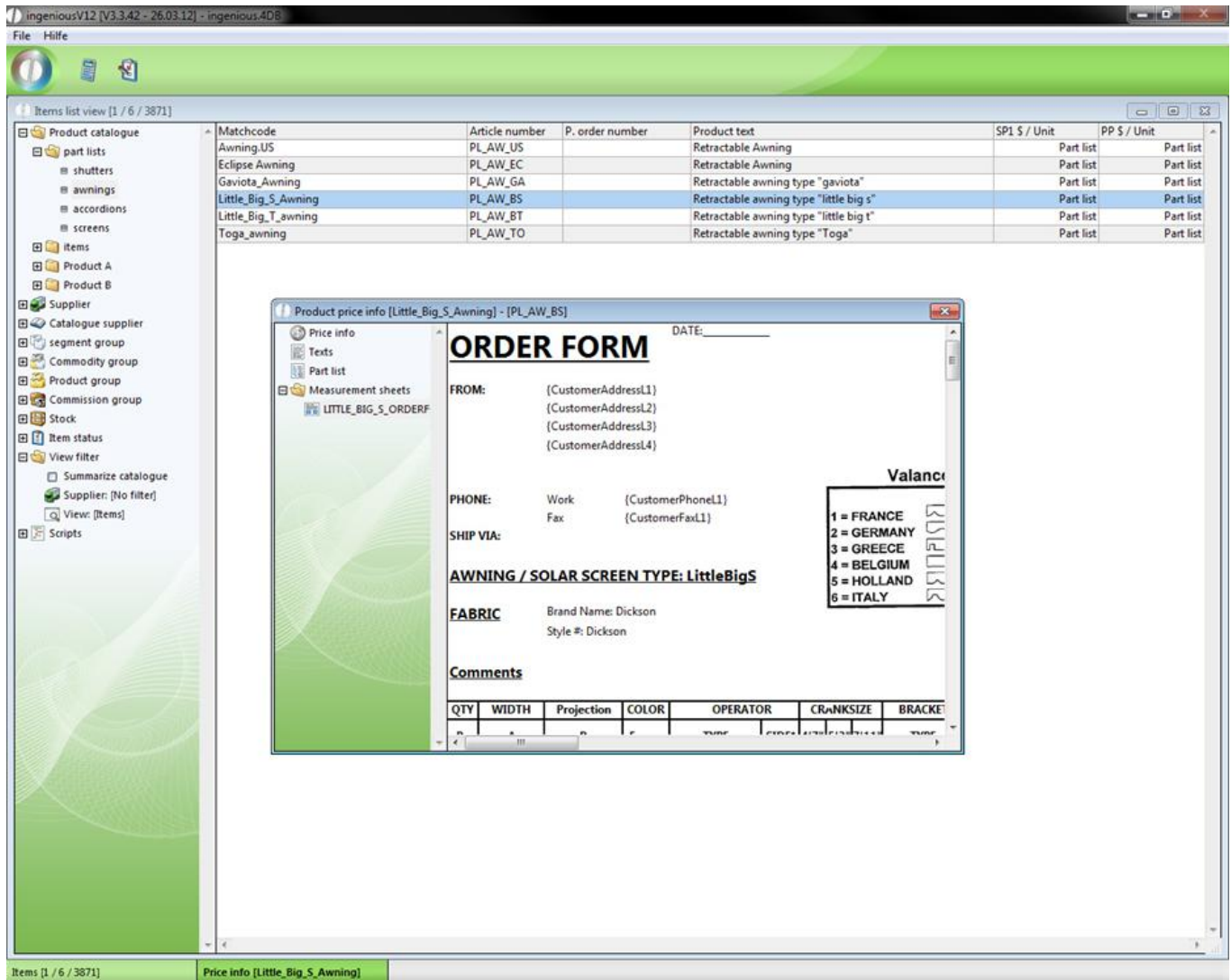
Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Awning.US	PL_AW_US		Retractable Awning		Part list
Eclipse Awning	PL_AW_EC		Retractable Awning		Part list
Gaviota_Awning	PL_AW_GA		Retractable awning type "gaviota"		Part list
Little_Big_S_Awning	PL_AW_BS		Retractable awning type "little big s"		Part list
Little_Big_T_Awning	PL_AW_BT		Retractable awning type "little big t"		Part list
Toga_Awning	PL_AW_TO		Retractable awning type "Toga"		Part list

A secondary window titled 'Product price info [Little_Big_S_Awning] - [PL_AW_BS]' is open, showing a table with columns: Matchcode/Name, Quantity, X inch, Y inch, Z inch, and SP. The table contains two rows of data:

Matchcode/Name	Quantity	X inch	Y inch	Z inch	SP
1 little_big_s_pricematrix	1.00	59.000	12.000	0.000	1557.22
2 PROFITLINE	1.00	0.000	0.000	0.000	934.33

The left sidebar shows a tree view with categories like Product catalogue, part lists, shutters, awnings, accordions, screens, items, Product A, Product B, Supplier, Catalogue supplier, segment group, Commodity group, Product group, Commission group, Stock, Item status, View filter, Summarize catalogue, Supplier: [No filter], View: [Items], and Scripts.

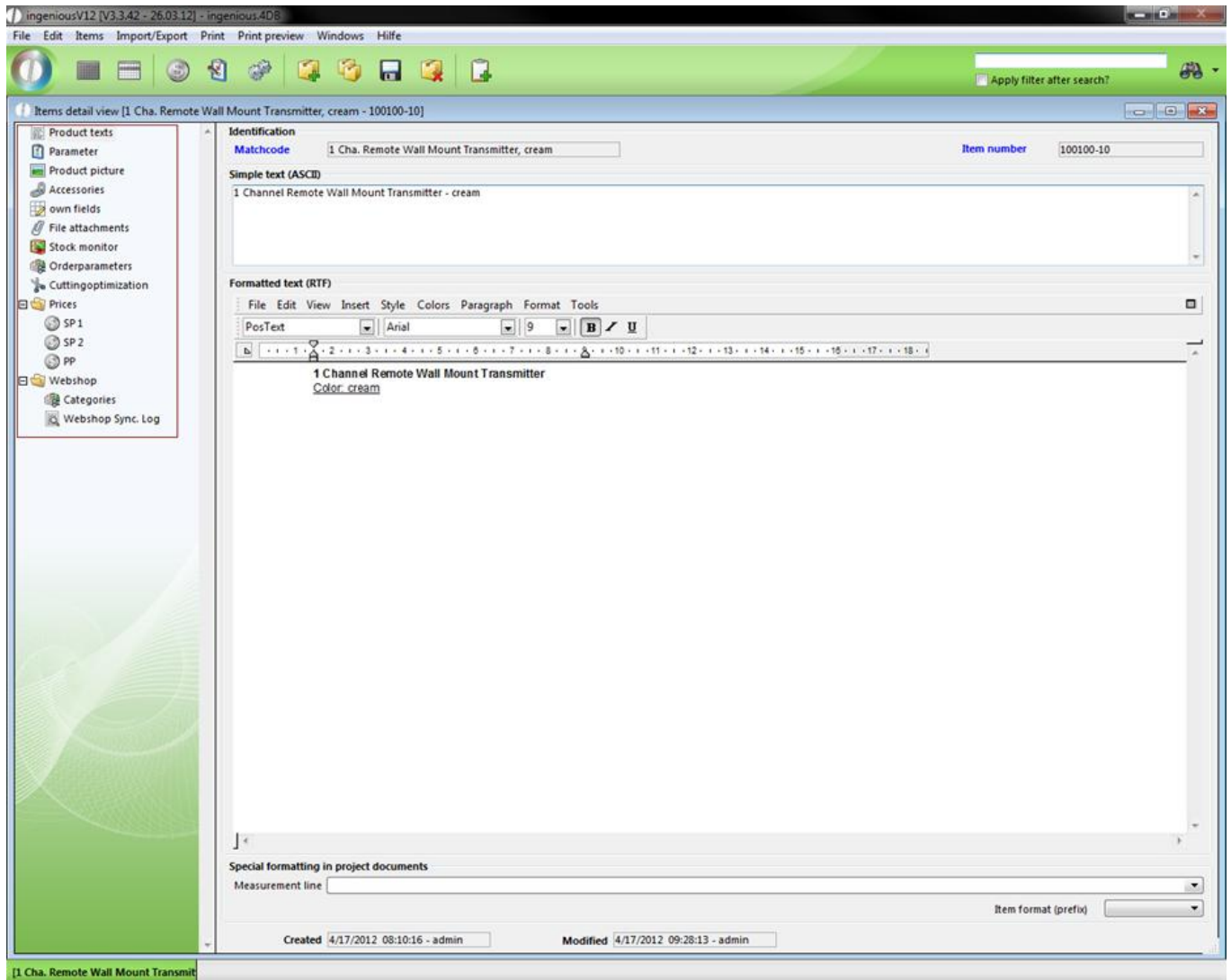
In the spreadsheet, information is listed about the amount, measurement selling price, time involved and discount of the individual accessories. In the folder, "Measurement sheets", the sample measurement sheet is found. Whether "Measurement sheets" documents are found in the file depends on if a measurement sheet was added to this item.



3.2.2 The items detail view

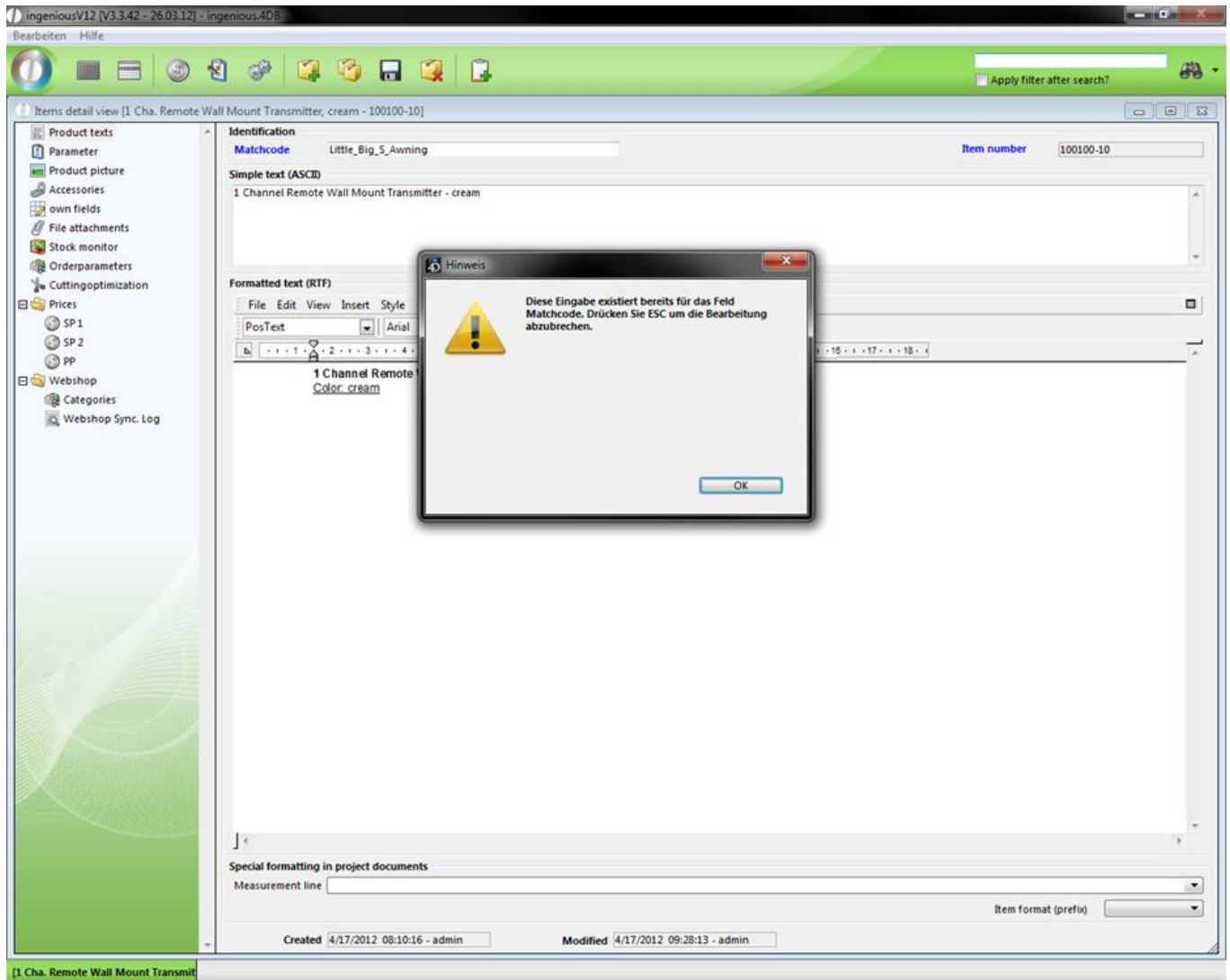
3.2.2.1 The items detail view

Here you will find all possibilities for specifying the product with its core data, illustrations and appendices. The item detail view is thereby clearly divided into the six columns "Product text", "Parameters", "Product picture", "Own Fields", "File attachment", "Stock Monitor", "Order Parameters", "Cut Optimization", "Prices" and "Webshop".



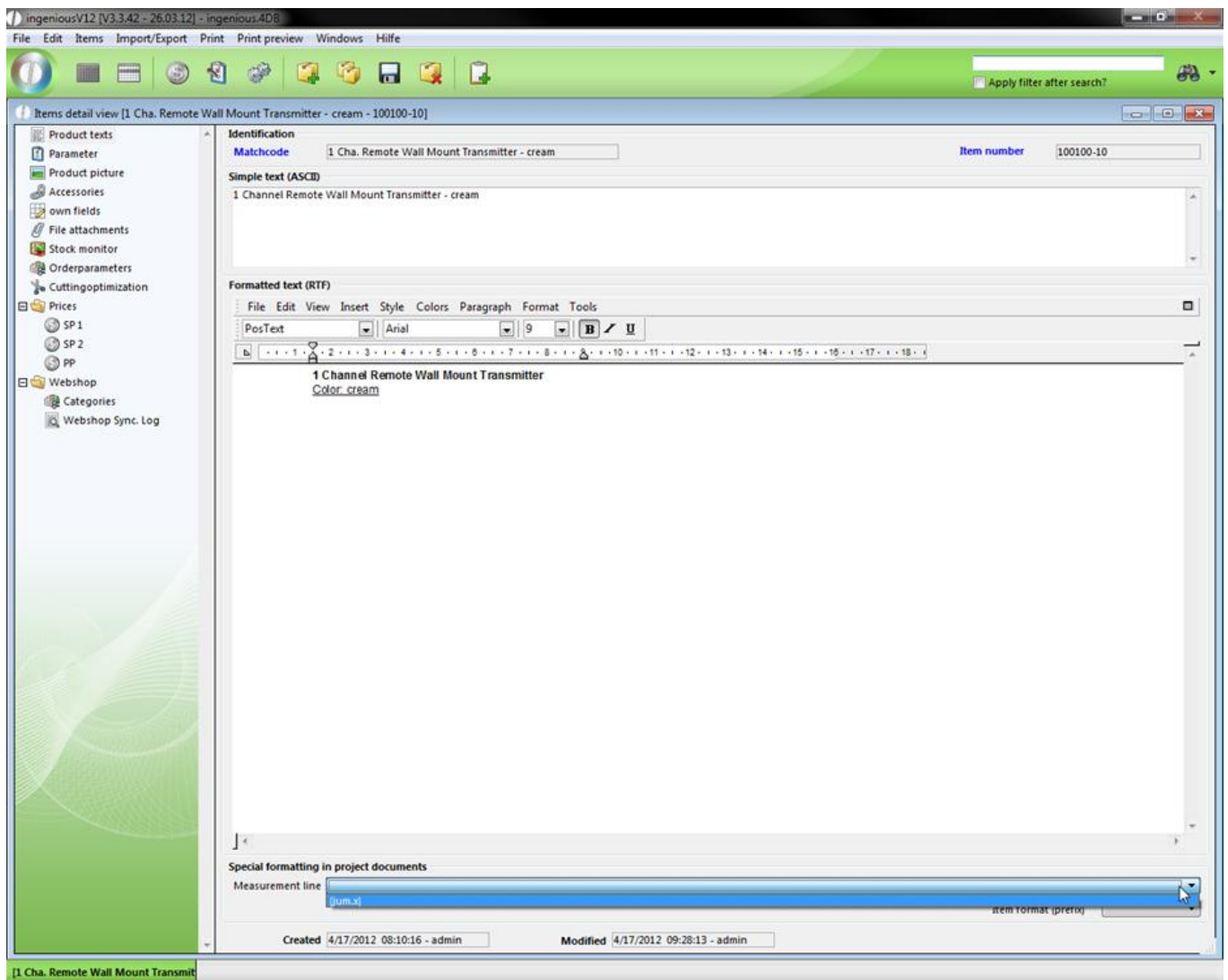
3.2.2.2 Product texts

The columns "Product texts" and "Product picture" assume the description of the product, whereas the column, "Product Picture", limits itself alone to the visual product description. The column "Product texts" rather serves, as the name already suggests, as the literal description of the item. The fields "Matchcode" and "item number" alone represent an exception here. These two fields are obligatory input fields, which one recognizes by the blue font. These fields must be filled out, because they are necessary for saving the file in Ingenious.V12. The matchcode identifies the record clearly. That means there are no two matchcodes alike in one database. If you want to name a matchcode after an already existing matchcode, an appropriate reference display window appears.



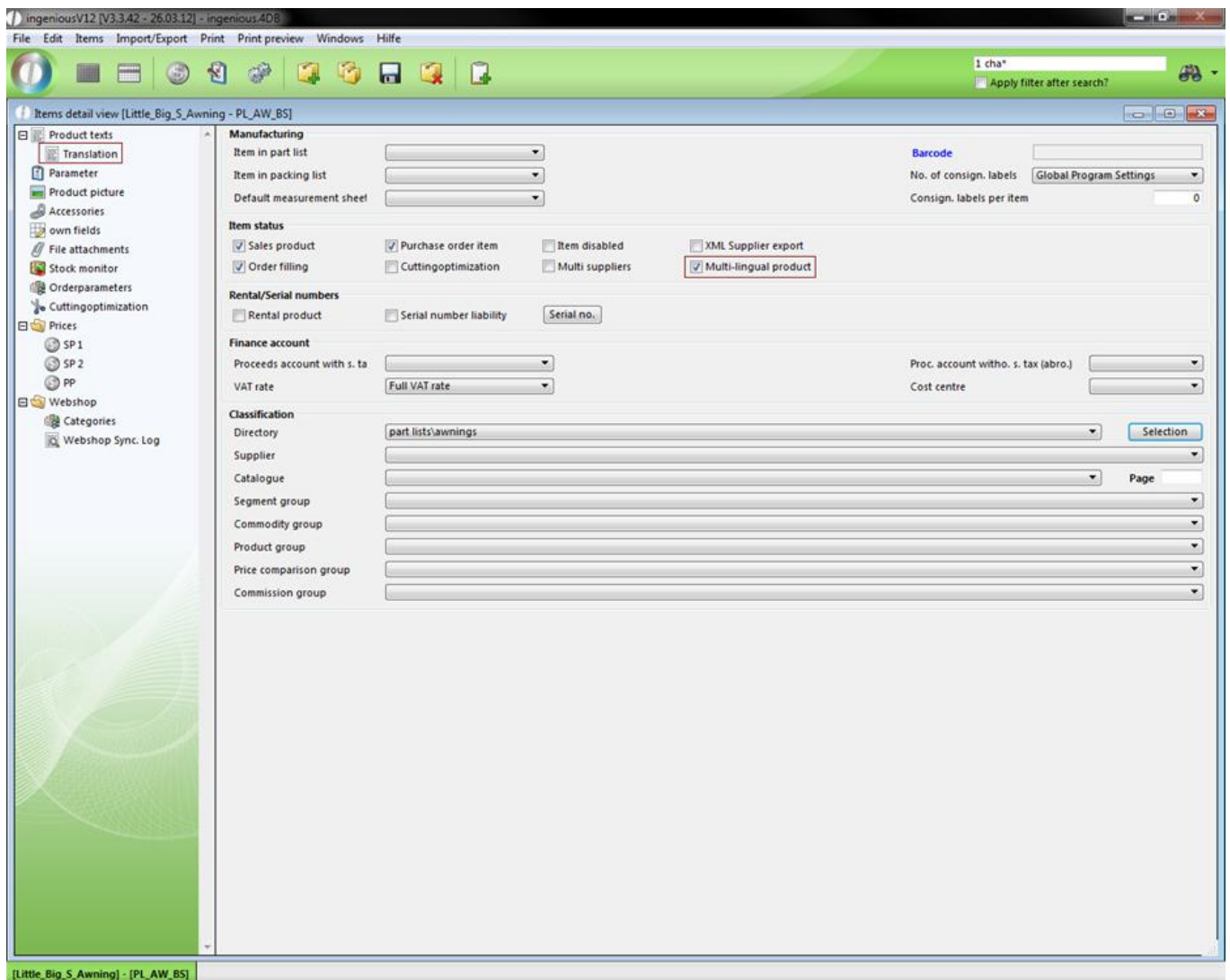
After the entry, secure these obligatory fields automatically (field is in grey), in order to protect against unintentional changing. You can remove this safeguard any time by double-clicking on the (blue) font to change the content.

In addition, in this column you will find fields to attached descriptive texts next to the obligatory fields. The text input field "Simple Text (ASCII)" and the Ingenious.V12 text processing in the area, "Formatted Text (RTF)" are available to you. In the area, "Formatted Text (RTF)", you are limited neither by the available space nor by creative freedom. This way, you can use all possibilities of the integrated text processing, such as tabs, frames, colors, character fonts and even the insertion of diagrams/illustrations. For these reasons this area is also suitable for providing operating or handling instructions. The third are of this column is "Special formatting in project documents". Here you can specify the measurement row (display of the item measurements or quantity with the output in the project positions) and position format (text formatting of the project document for printing with text modules) of the item. You can place the standard pre-setting for the measurement row in the administrative tool, "Program settings" in the column, "items" In the column, "Selection Lists", you can also insert more selection options of the measurement row with the module setting "Product Catalog" and enter "Multipos.Measurement Row", and you can edit this with the field editor (Shift + F2).

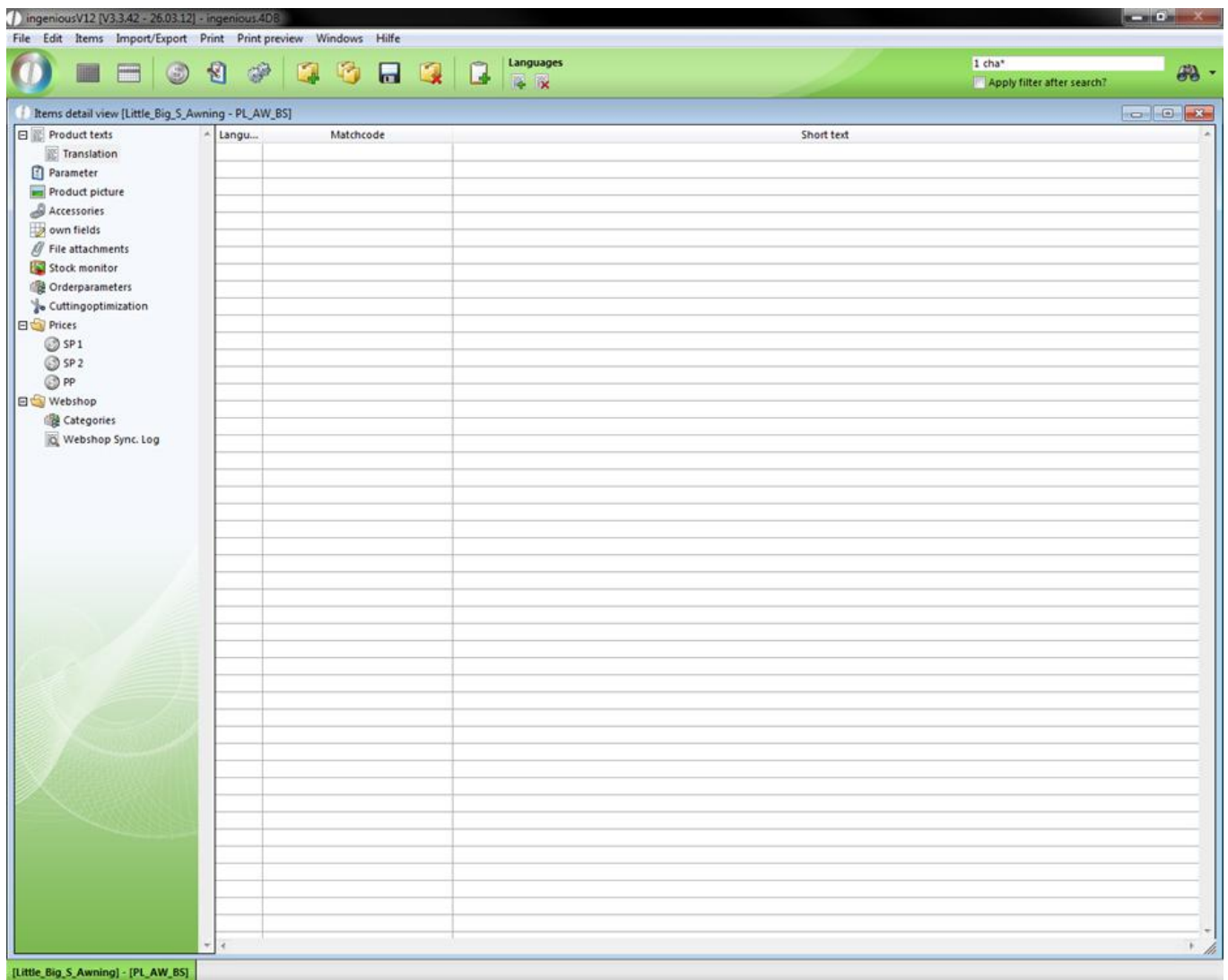



Multi-lingual items

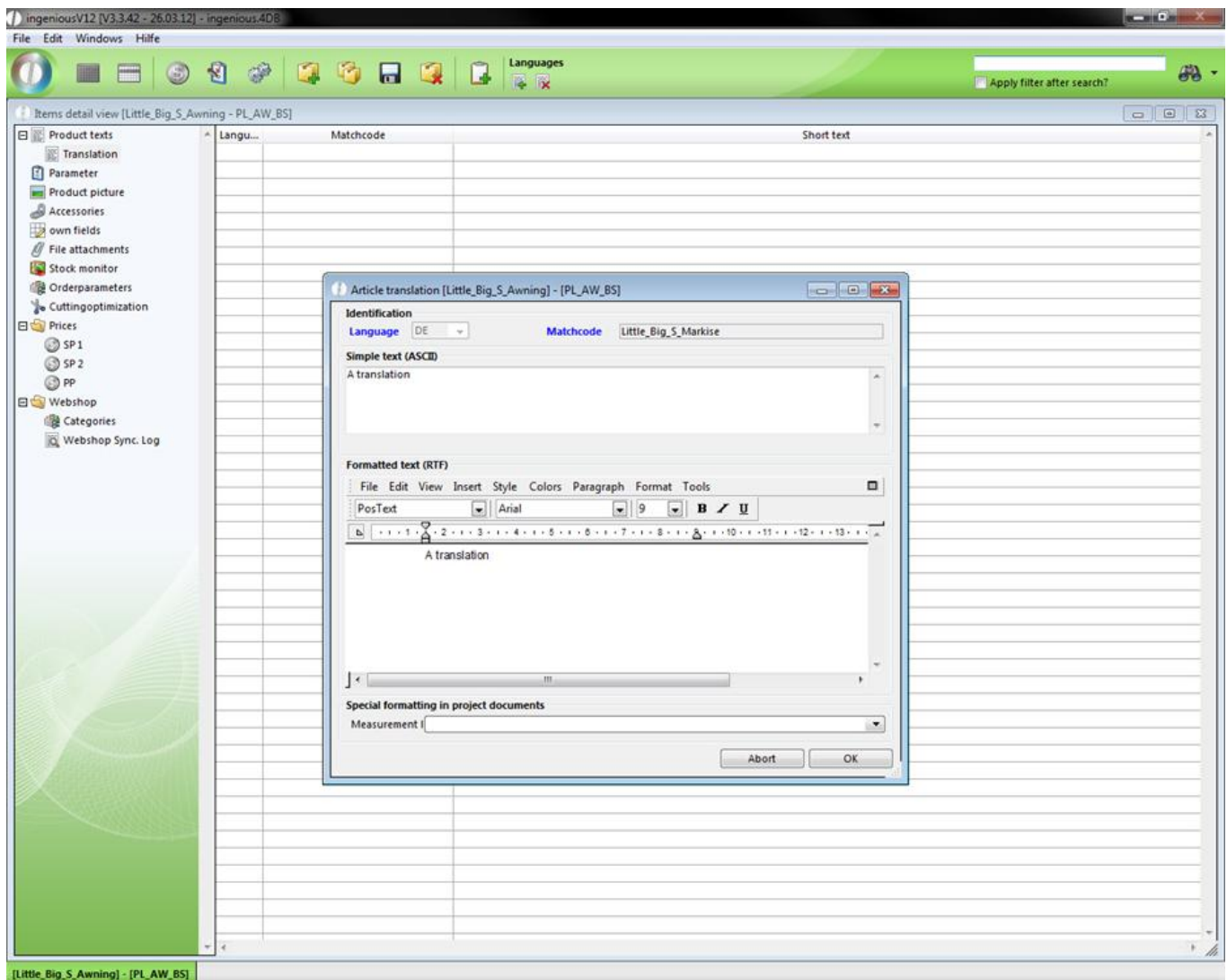
You can also create item texts in different languages. To do so, you have to check the option “Multi-lingual product” on the “parameter” page.



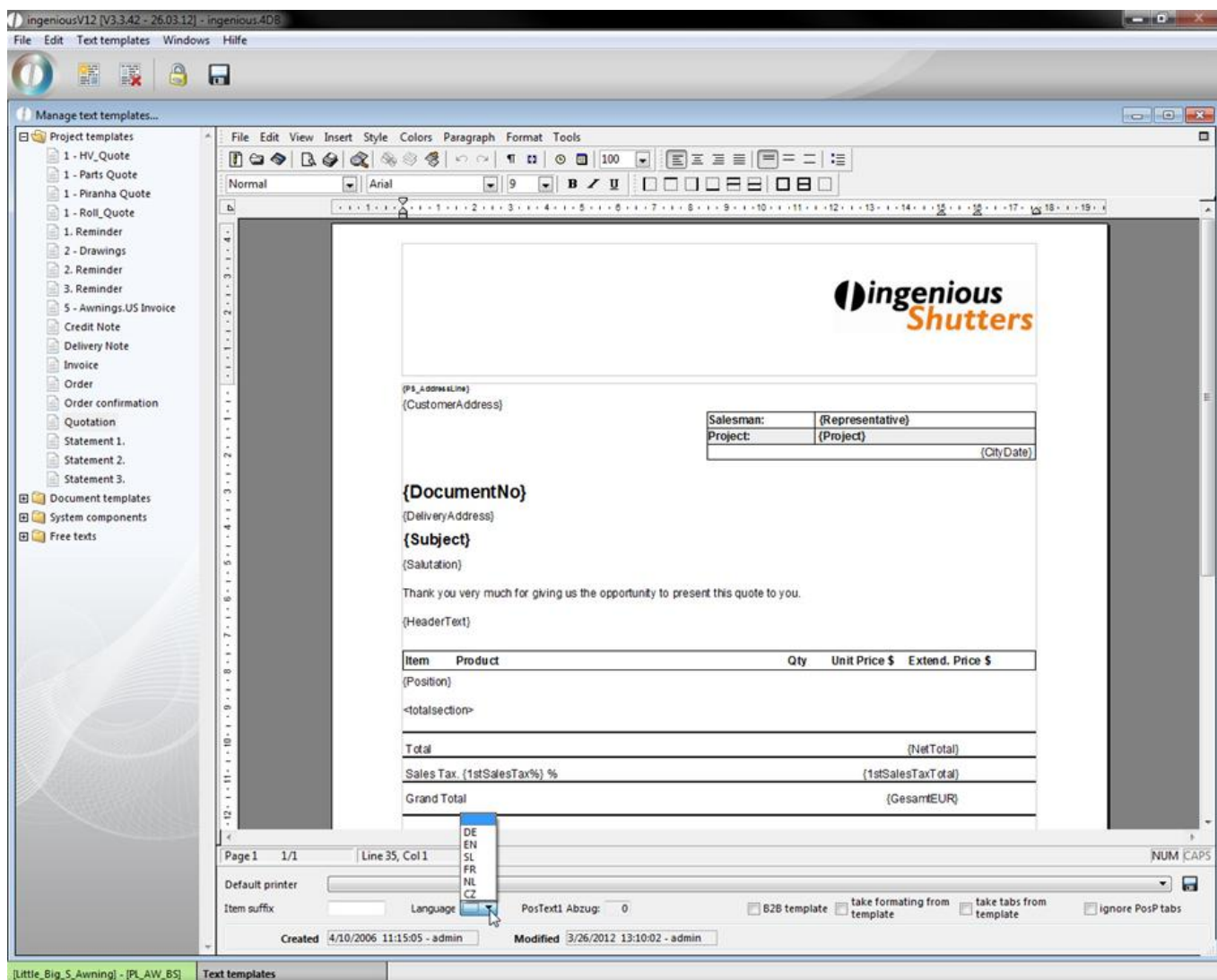
Now in the data selection area the item "Translation" is displayed.



To add a new translation click on . A window will open up where you can choose the desired target language and create the descriptive texts.



When you want to use a different language in a project, you have to choose the wished language in the “Template administration” in the bottom of a project template.



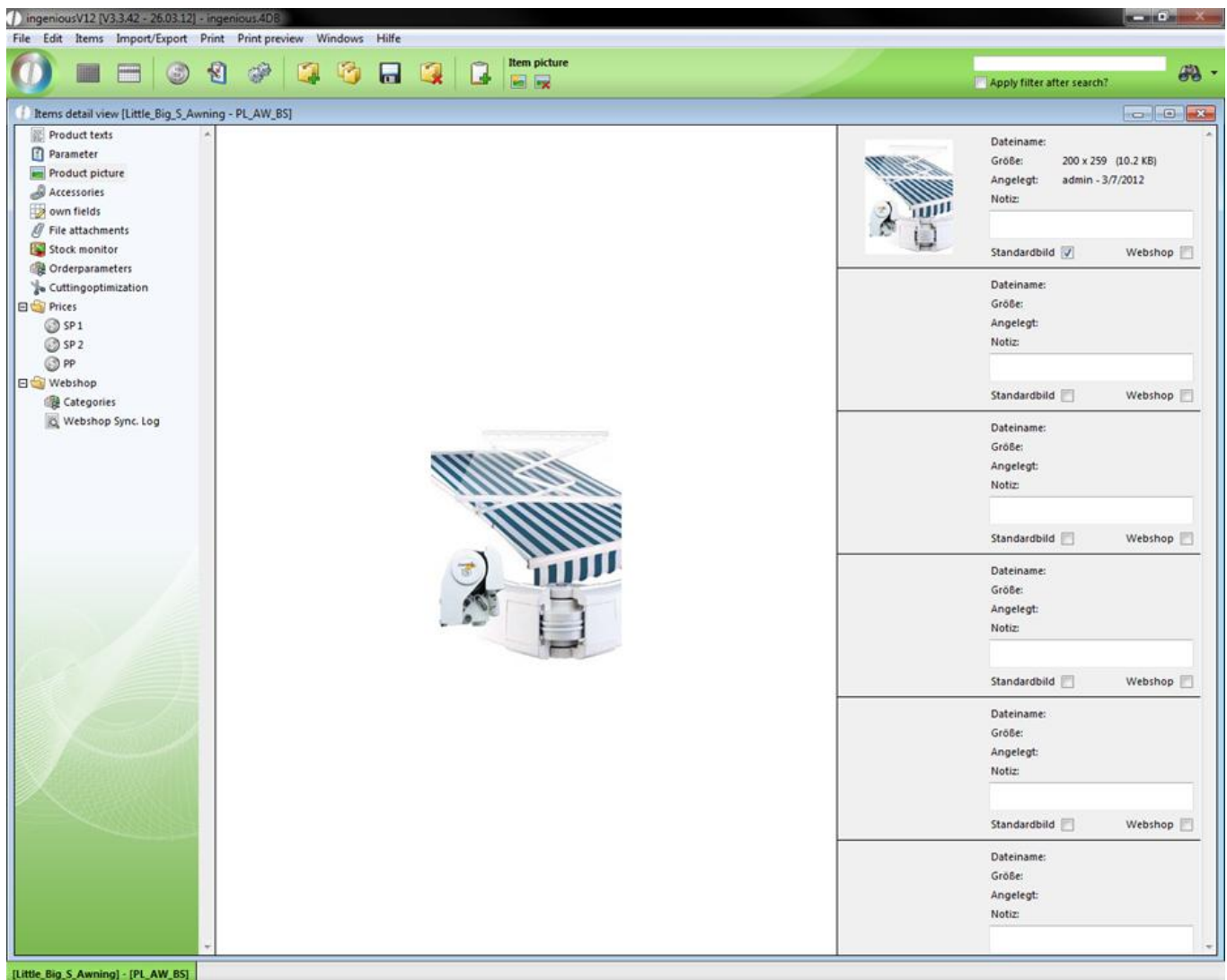
3.2.2.3 Items parameters


The column, "Parameters" and the column, "Prices" creates the most important possibility for assigning the file characteristics.

In this column, the areas, "Manufacturing", "item status", "Rent/Serial number", "Finance account" and "Classification" are included. In the area, "Manufacturing", you can confirm the "Position in the packing list" and the standard measurement sheet. The bar code of the item can also be added and the number of commission labels can be determined. In the area, "item status", you can specify if the item is a "Purchase order item" or a "Sales product". Also, the locking of the item is possible with a mouse-click on the check box "items disabled". You can also activate the item for the XML Supplier Export such as the order commissioning (with the sale of the item it is again ordered immediately) and assign the cut optimization. In the area, "Renting/Serial number liability", it can be determined whether the item is available as a "Rental product" and serial numbers can also be assigned. In the area, "Finance account", you can still assign the item another proceeds account as well as a VAT rate and a cost center. In order to assign a specific listing of the item catalogue, simply select this in the area "Classification" from the "Folder" selection field. The selection fields of this area such as "Supplier", "Commodity group", "Catalogue", "Page", "Product group", "Price comparison group" and "Commission group" provide the basis for the exact classification of the item. If the item is characterized as an order item, you have to the possibility to add its order number here.

3.2.2.4 Product picture


In the column, "Product picture", you have the possibility to attach a picture file. This illustration can be a sketch or a photo of the product.



When you click on the  button, a Windows standard dialogue appears to open files. If a message appears after confirming the selection with the "OK" button, then you selected a non-usable file (no graphic file).

The following file formats are possible:

- JPEG (.jpg)
- GIF (.gif)
- BMP (.bmp)
- PICT (.pct)

In order to delete a product picture again, it is sufficient to click on the  button.

3.2.2.5 Own items fields

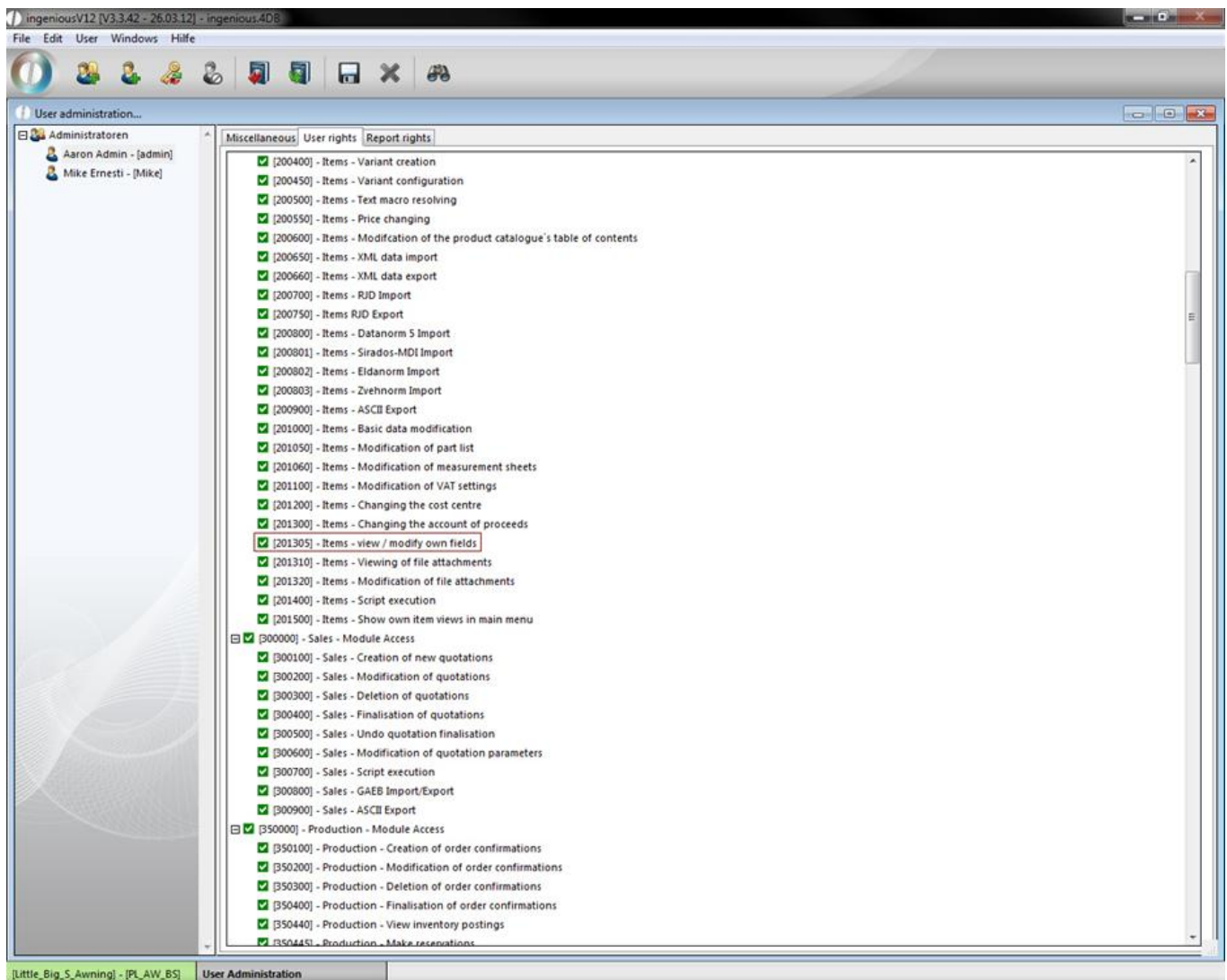
The screenshot shows the 'Items detail view' window in the ingenious.V12 software. The window title is 'Items detail view [Little_Big_S_Awning - PL_AW_BS]'. The interface is divided into several sections:

- Texts:** Five text input fields labeled 'individual_text_1' through 'individual_text_5'.
- Numbers:** Five numeric input fields labeled 'individual_number_1' through 'individual_number_5', each with a '0' value.
- Checkboxes:** Five checkbox fields labeled 'individual_check_1' through 'individual_check_5'.
- Dates:** Five date input fields labeled 'individual_date_1' through 'individual_date_5', each showing '00/00/00'.

The sidebar on the left contains a tree view with the following items:

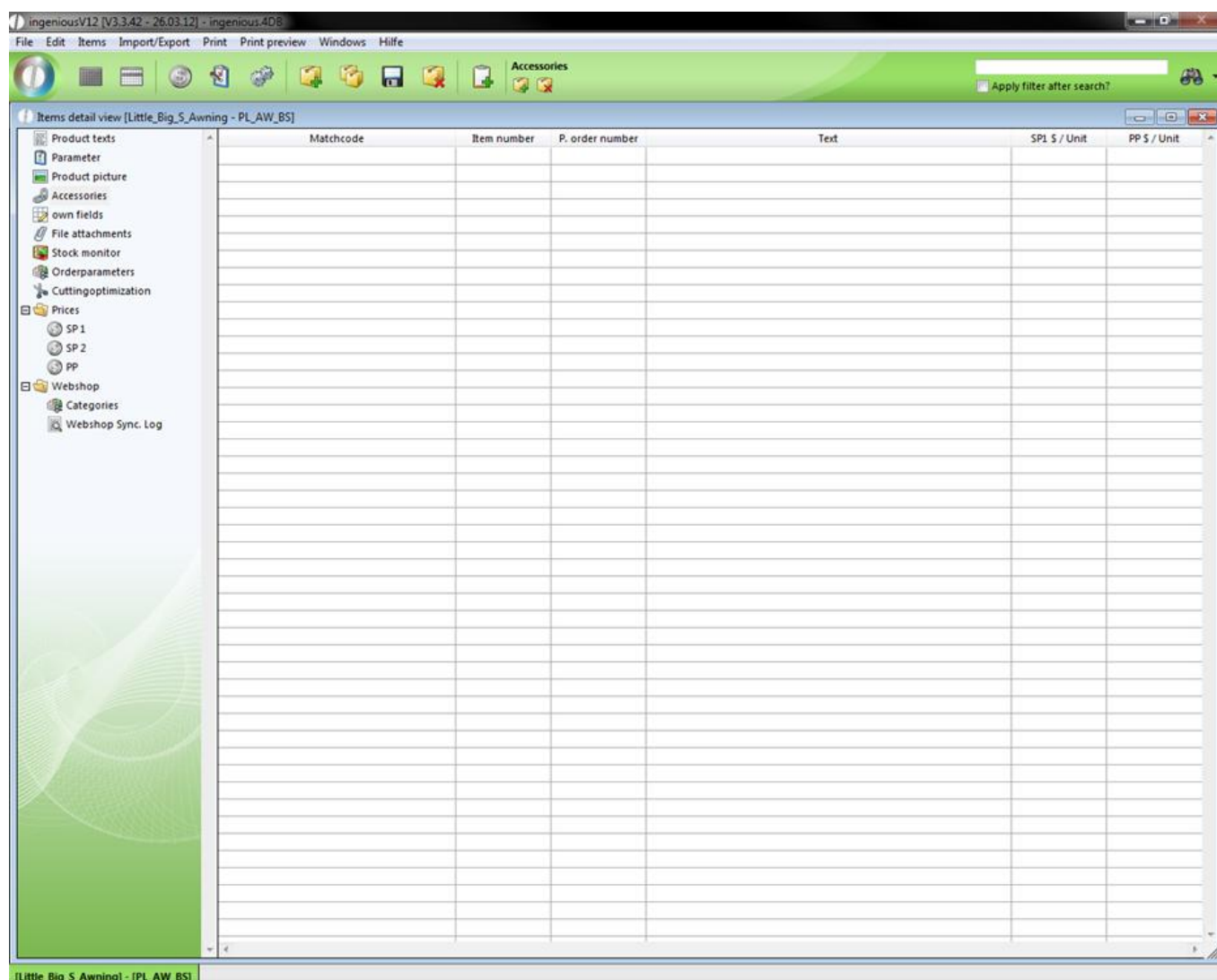
- Product texts
- Parameter
- Product picture
- Accessories
- own fields
- File attachments
- Stock monitor
- Orderparameters
- Cuttingoptimization
- Prices
 - SP 1
 - SP 2
 - PP
- Webshop
 - Categories
 - Webshop Sync. Log


You already are familiar with the area "Own fields" from the "Contacts" module so this should only therefore be described briefly. The column "Own Fields" gives you the possibility to make individual notes to an item. In order to be able to use the area, one must first activate the appropriate user right in order to sign on again.



As described in the contact module, for individual entries you can rename the different text fields, number fields, check boxes and date specifications with the help of the localization.

3.2.2.6 Accessories



In "Accessories" you can add available accessories to an item. A click on the icon  will open up the item list, where you can choose the accessory items.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Items Import/Export Print Print preview Windows Hilfe

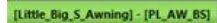
Apply filter after search?

Select and insert sales product... [1 / 3868 / 3868]

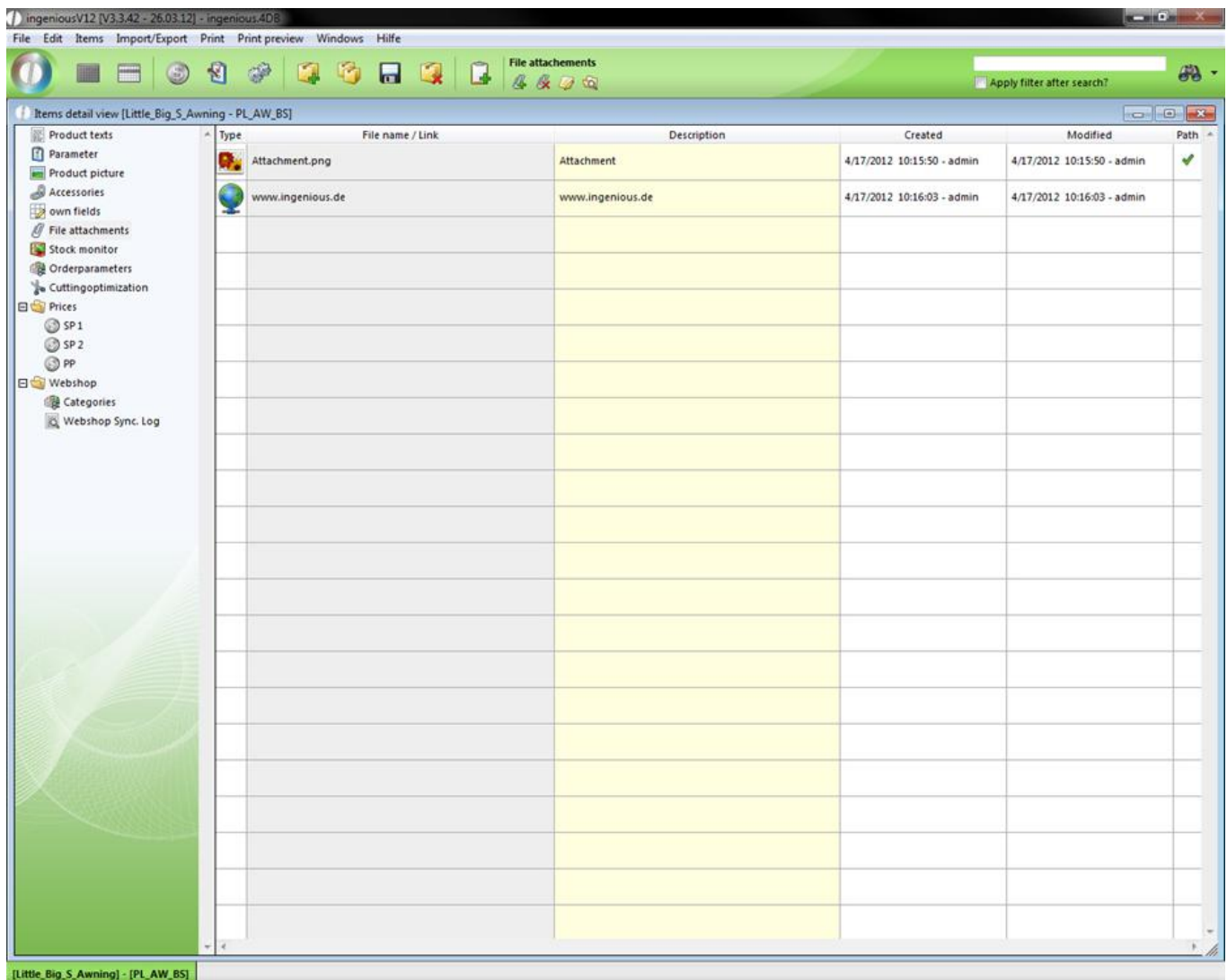
	Matchcode	Item number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Product catalogue	6.8 2 inch Build Out 1 leg wall header	83698	83698	6.8 2" Build Out 1 leg wall header beige - purchase dimension 20'	20.00 / ft	15.00 / ft
Supplier	6.8 2 inch Build Out 1 leg wall header	83692	83692	6.8 2" Build Out 1 leg wall header bronze - purchase dimension 20'	20.00 / ft	15.00 / ft
Catalogue supplier	6.8 2 inch Build Out 1 leg wall header	83696	83696	6.8 2" Build Out 1 leg wall header ivory - purchase dimension 20'	20.00 / ft	15.00 / ft
segment group	6.8 2 inch Build Out 1 leg wall header	83693	83693	6.8 2" Build Out 1 leg wall header white - purchase dimension 20'	20.00 / ft	15.00 / ft
Commodity group	6.8 2 leg wall header beige	83648	83648	6.8 2 leg wall header beige - purchase dimension 20'	20.00 / ft	15.00 / ft
Product group	6.8 2 leg wall header bronze	83642	83642	6.8 2 leg wall header bronze - purchase dimension 20'	16.00 / ft	12.00 / ft
Commission group	6.8 2 leg wall header ivory	83646	83646	6.8 2 leg wall header beige - purchase dimension 20'	16.00 / ft	12.00 / ft
Stock	6.8 2 leg wall header white	83643	83643	6.8 2 leg wall header beige - purchase dimension 20'	16.00 / ft	12.00 / ft
View filter	6.8 blade 14.5' beige	83508	83508	6.8 blade beige - purchase dimension 14.5'	0.00 / PC	0.00 / ft
Scripts	6.8 blade 14.5' bronze	83502	83502	6.8 blade bronze - purchase dimension 14.5'	16.00 / ft	12.00 / ft
	6.8 blade 14.5' ivory	83506	83506	6.8 blade ivory - purchase dimension 14.5'	16.00 / ft	12.00 / ft
	6.8 blade 14.5' white	83503	83503	6.8 blade white - purchase dimension 14.5'	16.00 / ft	12.00 / ft
	6.8 blade 16.5' beige	83508	83508	6.8 blade beige - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 blade 16.5' bronze	83502	83502	6.8 blade bronze - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 blade 16.5' ivory	83506	83506	6.8 blade ivory - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 blade 16.5' white	83503	83503	6.8 blade white - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 ceiling header beige	83588	83588	6.8 ceiling header beige - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 ceiling header bronze	83582	83582	6.8 ceiling header bronze - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 ceiling header ivory	83586	83586	6.8 ceiling header ivory - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 ceiling header white	83583	83583	6.8 ceiling header white - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 center made beige	83568	83568	6.8 center made (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 center made bronze	83562	83562	6.8 center made (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 center made ivory	83566	83566	6.8 center made (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 center made white	83563	83563	6.8 center made (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise blade beige	83518	83518	6.8 hirise blade beige - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 hirise blade bronze	83512	83512	6.8 hirise blade bronze - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 hirise blade ivory	83516	83516	6.8 hirise blade ivory - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 hirise blade white	83513	83513	6.8 hirise blade white - purchase dimension 16.5'	16.00 / ft	12.00 / ft
	6.8 hirise center made left (INSIDE) be	83428	83428	6.8 hirise center made left (INSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made left (INSIDE) br	83422	83422	6.8 hirise center made left (INSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made left (INSIDE) iv	83426	83426	6.8 hirise center made left (INSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made left (INSIDE) wf	83423	83423	6.8 hirise center made left (INSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made right (OUTSIDE) 83448	83448	83448	6.8 hirise center made right (OUTSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made right (OUTSIDE) 83442	83442	83442	6.8 hirise center made right (OUTSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made right (OUTSIDE) 83446	83446	83446	6.8 hirise center made right (OUTSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise center made right (OUTSIDE) 83443	83443	83443	6.8 hirise center made right (OUTSIDE) (color) - purchase dimension (pdim)	16.00 / ft	12.00 / ft
	6.8 hirise connector beige	83418	83418	6.8 hirise connector beige - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise connector bronze	83412	83412	6.8 hirise connector bronze - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise connector ivory	83416	83416	6.8 hirise connector ivory - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise connector white	83413	83413	6.8 hirise connector white - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise starter strip beige	83408	83408	6.8 hirise starter strip beige - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise starter strip bronze	83402	83402	6.8 hirise starter strip bronze - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise starter strip ivory	83406	83406	6.8 hirise starter strip ivory - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 hirise starter strip white	83403	83403	6.8 hirise starter strip white - purchase dimension 18'	16.00 / ft	12.00 / ft
	6.8 sill adapter beige	83628	83628	6.8 sill adapter beige - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 sill adapter bronze	83622	83622	6.8 sill adapter bronze - purchase dimension 20'	16.00 / ft	12.00 / ft
	6.8 sill adapter ivory	83636	83636	6.8 sill adapter ivory - purchase dimension 20'	16.00 / ft	12.00 / ft

[Little_Big_S_Awning] - [PL_AW_BS] Select and insert item

With a double click you add the selected item to the accessory list.



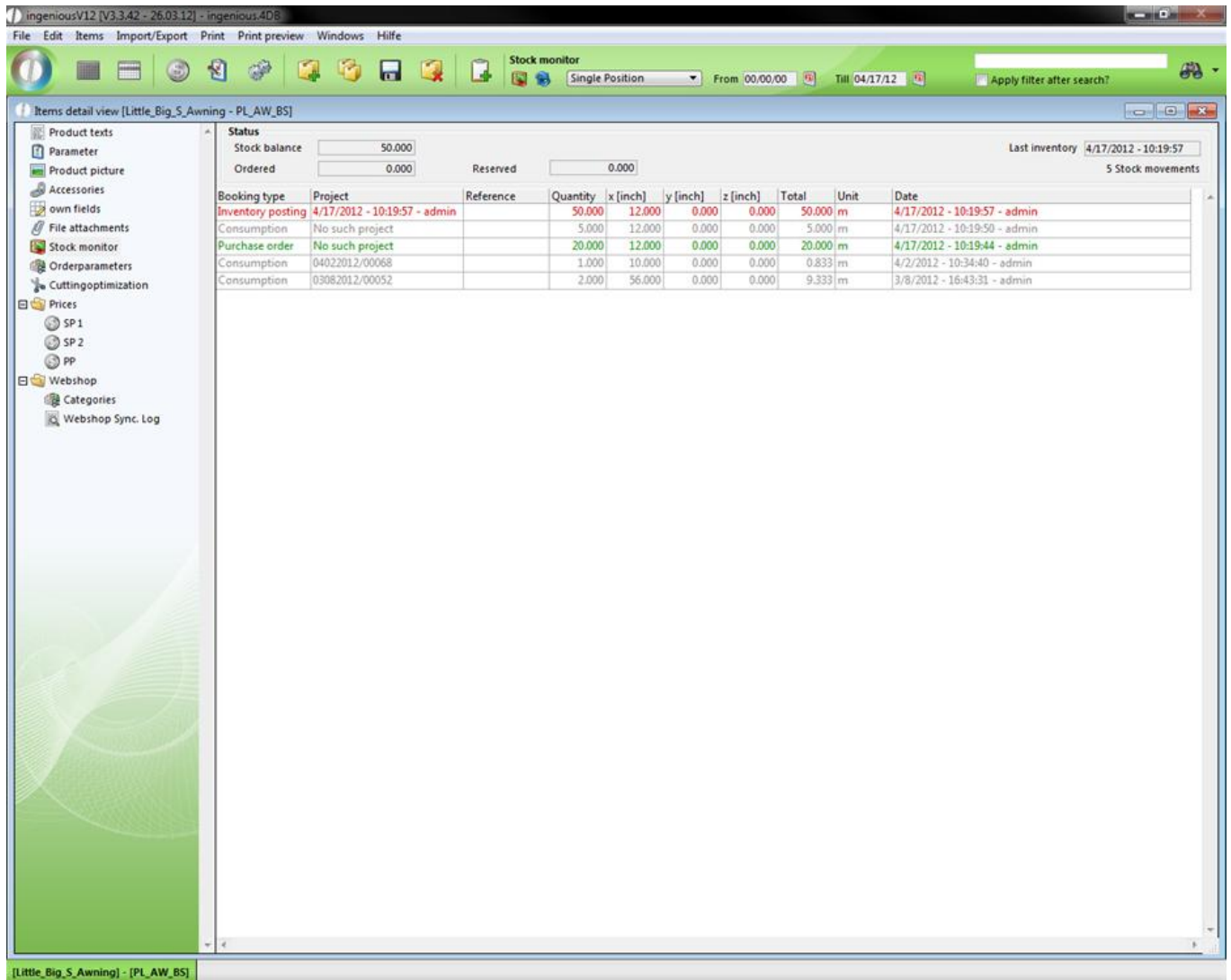
3.2.2.7 Items file attachments




The function of the file creations is available to you in the entire workflow, in purchasing and in the entry vouchers. Here important external documents can be assigned to the individual items, managed centrally and stored. You will find an exact description of this detail area in Contacts.


3.2.2.8 Stock monitor

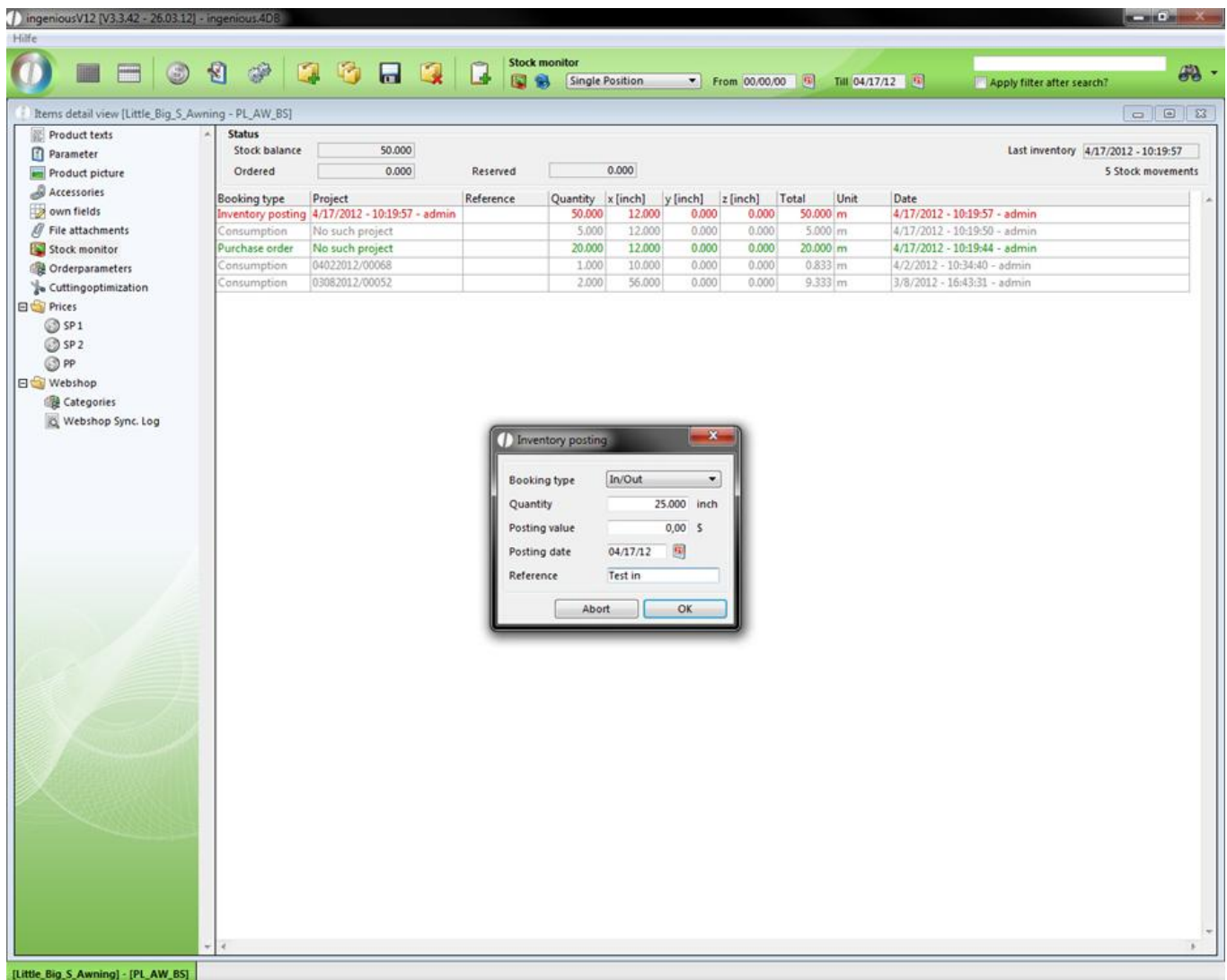
The inventory monitor simplifies the procurement of order items for you. In addition, you always keep an overview of incoming and outgoing inventory.



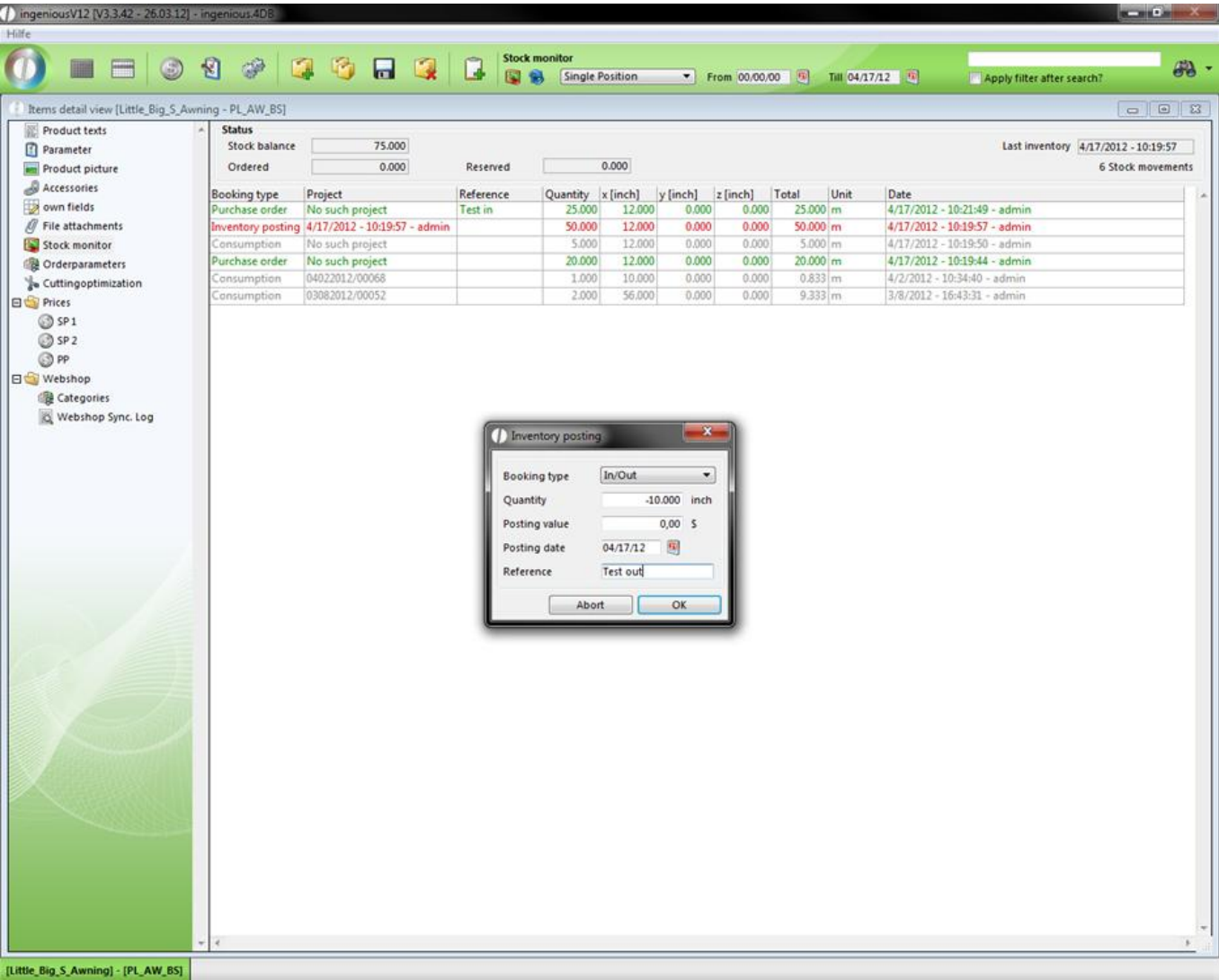
In the "Status" area, you always have a view of the current inventory status, the ordered quantity, the date of the last inventory and the number of all inventory activity of this item. With the help of the  button, you can very easily enter all inventory activity in Ingenious.V12.

Practice using the stock monitor

1. After you clicked on the  button, a window for the quantity in stock appears.
2. Here you can select then the posting type according to whether you would like to take on an inventory input/output or an inventory posting. In addition, you provide the quantity and the value and commodity reference, according to the need.



3. With the use of items, you must write a minus for use before the number, since the existence is otherwise increased by the entered sum (order below).



The screenshot shows the 'Stock monitor' window in the ingenious.V12 software. The window title is 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408'. The menu bar includes File, Edit, Items, Import/Export, Print, Print preview, Windows, and Hilfe. The toolbar contains various icons for file operations and a 'Stock monitor' button. The main area is titled 'Items detail view [Little_Big_S_Awning - PL_AW_BS]'. On the left is a sidebar with a tree view containing: Product texts, Parameter, Product picture, Accessories, own fields, File attachments, Stock monitor (selected), Orderparameters, Cuttingoptimization, Prices (with sub-items SP 1, SP 2, PP), Webshop (with sub-items Categories, Webshop Sync. Log). The main content area shows the 'Status' section with 'Stock balance' at 65.000, 'Ordered' at 0.000, and 'Reserved' at 0.000. Below this is a table of stock movements. The table has columns: Booking type, Project, Reference, Quantity, x [inch], y [inch], z [inch], Total, Unit, and Date. The table shows 5 stock movements, with the most recent being an 'Inventory posting' on 4/17/2012 at 10:19:57, increasing the stock balance from 25.000 to 50.000.

Booking type	Project	Reference	Quantity	x [inch]	y [inch]	z [inch]	Total	Unit	Date
Consumption	No such project	Test out	10.000	12.000	0.000	0.000	10.000	m	4/17/2012 - 10:22:19 - admin
Purchase order	No such project	Test in	25.000	12.000	0.000	0.000	25.000	m	4/17/2012 - 10:21:49 - admin
Inventory posting	4/17/2012 - 10:19:57 - admin		50.000	12.000	0.000	0.000	50.000	m	4/17/2012 - 10:19:57 - admin
Consumption	No such project		5.000	12.000	0.000	0.000	5.000	m	4/17/2012 - 10:19:50 - admin
Purchase order	No such project		20.000	12.000	0.000	0.000	20.000	m	4/17/2012 - 10:19:44 - admin

View of the stock movement according to an inventory increase

4. Note that during inventory, the number entered represents the new status and not an input or output.

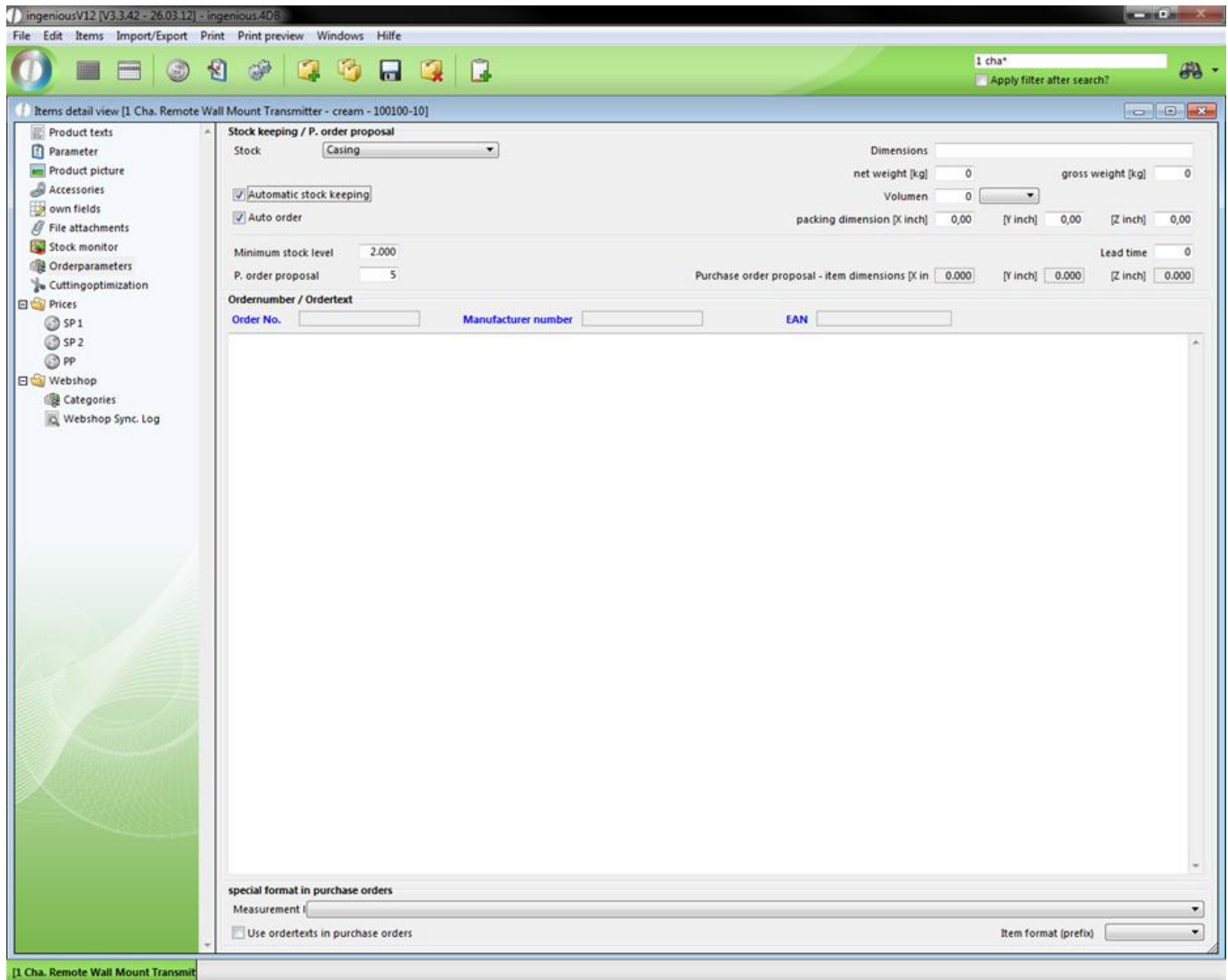
The screenshot shows the 'Stock monitor' window in ingenious.V12. The left sidebar contains a tree view with categories like Product texts, Parameter, Product picture, Accessories, own fields, File attachments, Stock monitor, Orderparameters, Cutting optimization, Prices (with sub-items SP 1, SP 2, PP), Webshop, Categories, and Webshop Sync. Log. The main area displays 'Items detail view [Little_Big_S_Awning - PL_AW_BS]'. At the top, there are input fields for 'Status', 'Stock balance' (60.000), 'Ordered' (0.000), and 'Reserved' (0.000). A 'Last inventory' date of '4/17/2012 - 10:23:03' is shown. Below this is a table with 10 columns: Booking type, Project, Reference, Quantity, x [inch], y [inch], z [inch], Total, Unit, and Date. The table lists 6 stock movements, including inventory postings, consumption, and purchase orders, with their respective dates and user names (admin).

Booking type	Project	Reference	Quantity	x [inch]	y [inch]	z [inch]	Total	Unit	Date
Inventory posting	4/17/2012 - 10:23:03 - admin		60.000	12.000	0.000	0.000	60.000	m	4/17/2012 - 10:23:03 - admin
Consumption	No such project	Test out	10.000	12.000	0.000	0.000	10.000	m	4/17/2012 - 10:22:19 - admin
Purchase order	No such project	Test in	25.000	12.000	0.000	0.000	25.000	m	4/17/2012 - 10:21:49 - admin
Inventory posting	4/17/2012 - 10:19:57 - admin		50.000	12.000	0.000	0.000	50.000	m	4/17/2012 - 10:19:57 - admin
Consumption	No such project		5.000	12.000	0.000	0.000	5.000	m	4/17/2012 - 10:19:50 - admin
Purchase order	No such project		20.000	12.000	0.000	0.000	20.000	m	4/17/2012 - 10:19:44 - admin

View of the inventory after an inventory posting

3.2.2.9 Order parameters

In the area, "Stock keeping/Purchase order proposal", you can specify, for example, whether the inventory management (checkmark next to "Automatic stock keeping") and the order (checkmark next to "Auto Order") for this item are to be automatically made by Ingenious.V12.



View of the area, "Stock keeping/Automatic Ordering"

If this (as shown in the above illustration) is the case, the remaining fields should also be filled out with "Inventory", "Minimum stock", "Purchase order proposal", and the respective fields for the item dimensions. In the selection list, "Stock", all established Ingenious.V12 inventory locations are available. A new assembly of inventory occurs in the column, "Selection lists" of the of the program settings. If the stock is reduced during a more active "Automatic stock keeping" and "Auto order" under the field, "Minimum stock" fixed value; Ingenious.V12 automatically prepares the order of the item at the height of the value registered in the field "Purchase order proposal". Thereby consideration is given to the necessary dimensions of the item, which are to be registered in the fields "Purchase order proposal item dimensions [X cm]", "[Y cm]" and "[Z cm]". Moreover, you can specify the order text and format the measurement row and the position format prefix by selection.

In the group „Ordernumber“ you can set the order number of an item and create an order text, which will be used in the document as the item description, when you check the field "use ordertexts in purchase orders".

The screenshot displays the ingenious.V12 software interface. The title bar shows 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408'. The menu bar includes 'File', 'Edit', 'Purchase p. orders', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains various icons for file operations and printing. The main window is titled 'Projects detail view [Supplier1] - [Purchase order 04172012/00013]'. On the left, a sidebar lists 'Miscellaneous', 'Items', 'Documents and Notes', 'own fields', 'File attachments', and 'Print preview'. The main content area shows the 'Purchase order 04172012/00013' form. The form includes the 'ingenious Shutters' logo, supplier information for 'Supplier1' (789 Mainstreet, New York, 12345), and a table for the purchase order items. The table has columns for 'Item', 'Product', 'Qty', 'Unit Price \$', and 'Extend. Price \$'. The first item is '001 NEW ORDER TEXT' with a quantity of 5.00, a unit price of 7.60, and an extended price of 38.00. The total amount is 38.00. The status bar at the bottom shows 'Page 1 1/1' and 'Line 22, Col 2'.

Purchase order 04172012/00013

Item	Product	Qty	Unit Price \$	Extend. Price \$
001	NEW ORDER TEXT Amount: 5.00 PC	5.00	7.60	38.00
Total (plus Taxes.)				38.00

Additionally you can set a different measurement line in the "special format in purchase orders" area, which will be used in purchase order documents.

Multi suppliers

When a company obtains items from multiple suppliers, this can be mentioned at the item in multi suppliers in ingenious.V12. You just have to check the field "multi suppliers" in the parameter category.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Items Import/Export Print Print preview Windows Hilfe

Apply filter after search?

Items detail view [1 Cha. Remote Wall Mount Transmitter - cream - 100100-10]

Product texts
Parameter
Product picture
Accessories
own fields
File attachments
Stock monitor
Orderparameters
Cuttingoptimization
Prices
Webshop
Categories
Webshop Sync. Log

Manufacturing
Item in part list: 5.Controls
Item in packing list
Default measurement sheet

Item status
☐ Sales product ☒ Purchase order item ☐ Item disabled ☐ XML Supplier export
☐ Order filling ☐ Cuttingoptimization ☒ Multi suppliers ☐ Multi-lingual product

Rental/Serial numbers
☐ Rental product ☐ Serial number liability Selection

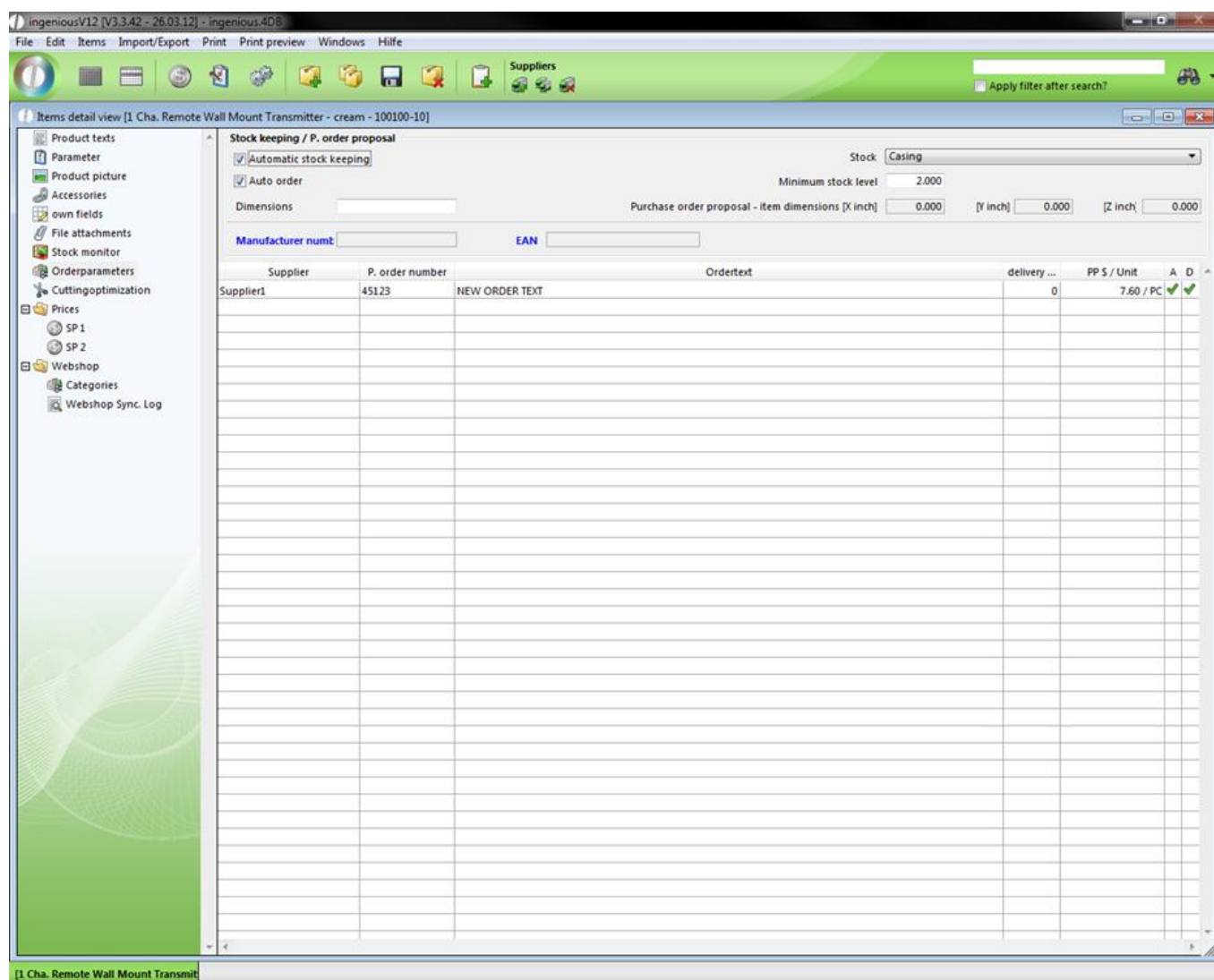
Finance account
Proceeds account with s. ta: 4501
VAT rate: Full VAT rate
Proc. account with s. tax (abro.):
Cost centre: 1000


Classification
Directory: Product A
Supplier: Supplier1
Catalogue
Segment group
Commodity group
Product group: Motor
Price comparison group
Commission group: Sales

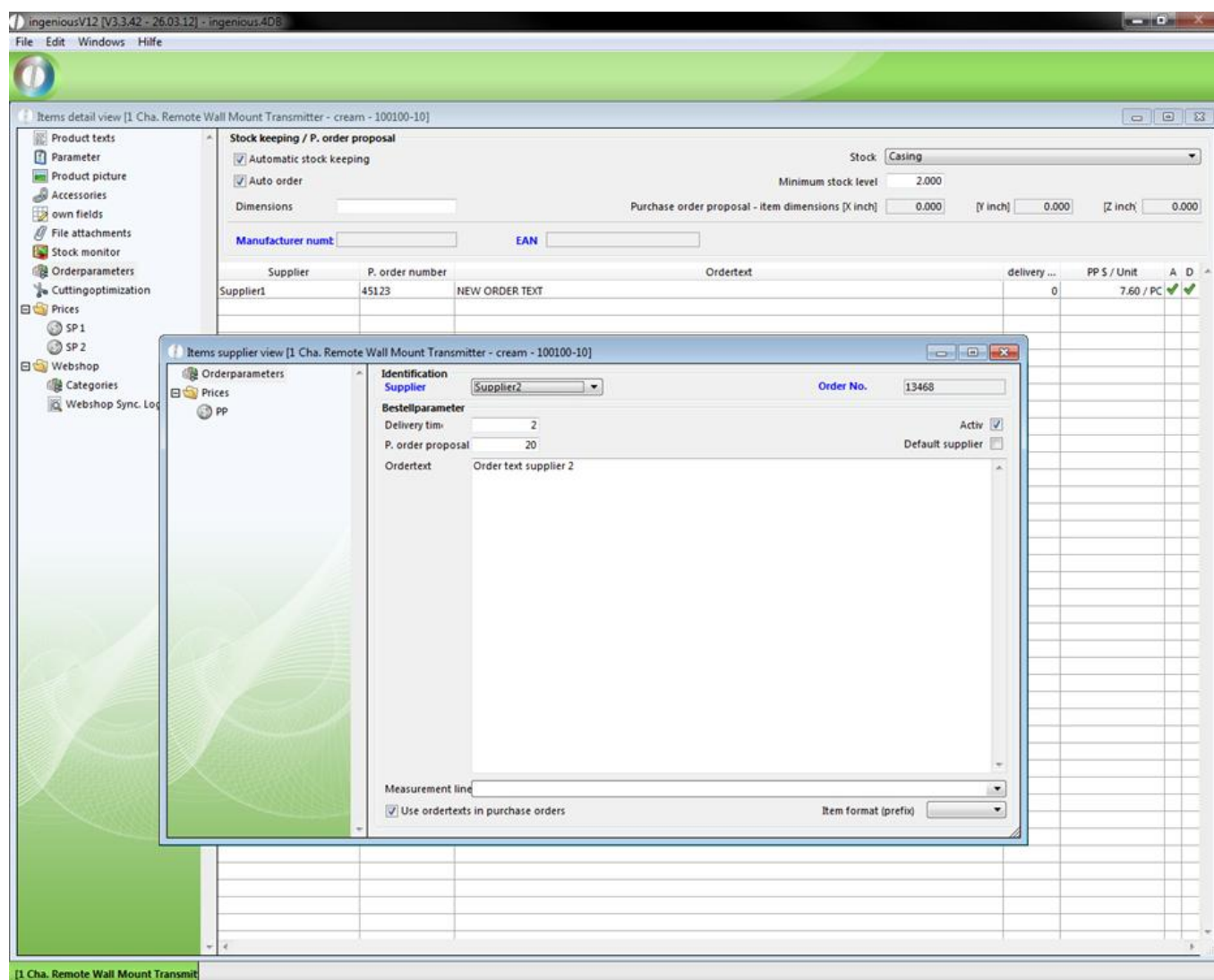
Barcode
No. of consign. labels: Global Program Settings
Consign. labels per item: 0

[1 Cha. Remote Wall Mount Transmitter]

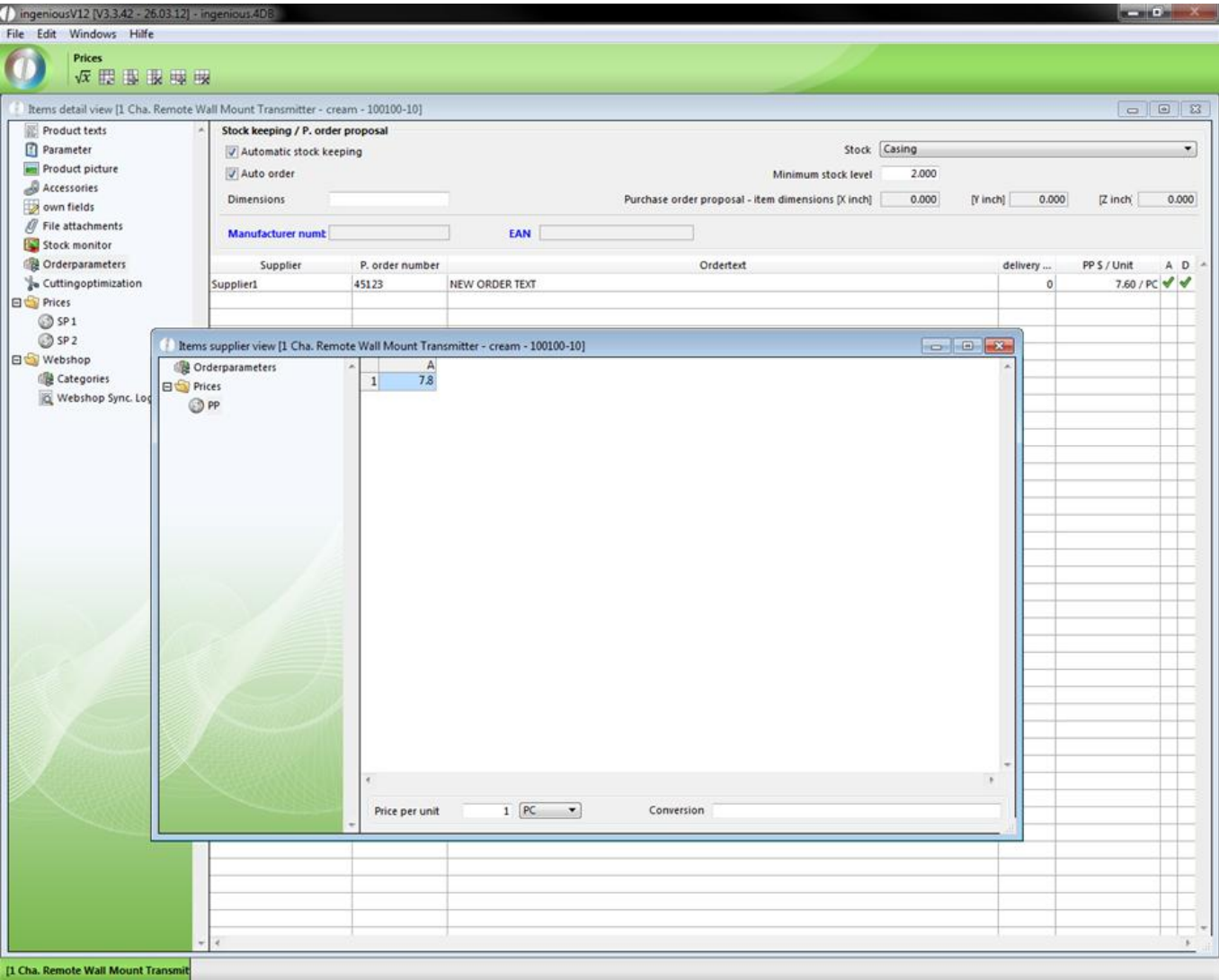
Now the purchase price can be found in the category "order parameter" and there is also displayed automatically the default supplier.

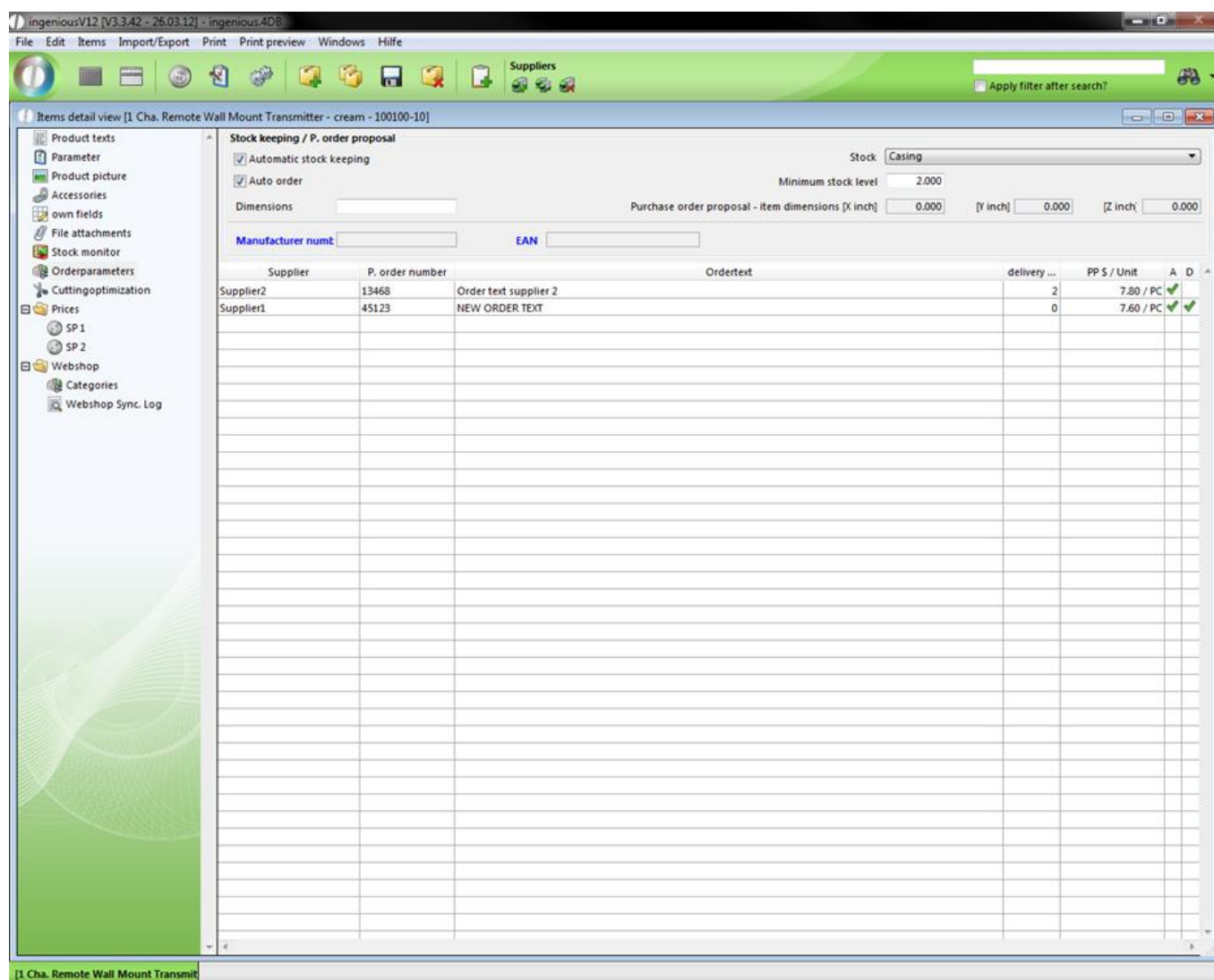


With the help of the button  a new supplier can be added. In order to do this you only have to choose the desired supplier and set the order number, the delivery time in days, the purchase order proposal, the individual order text and the measurement line.

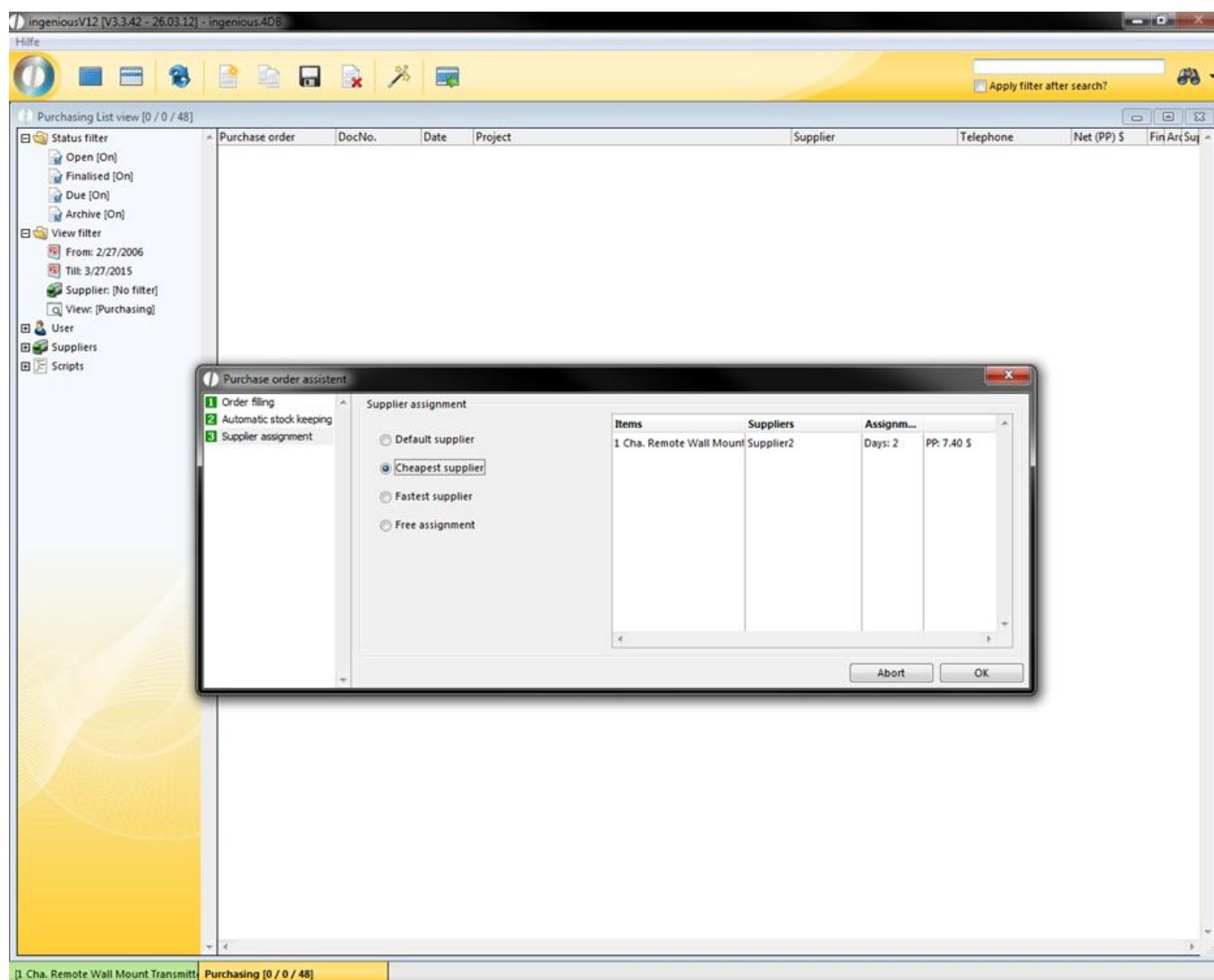


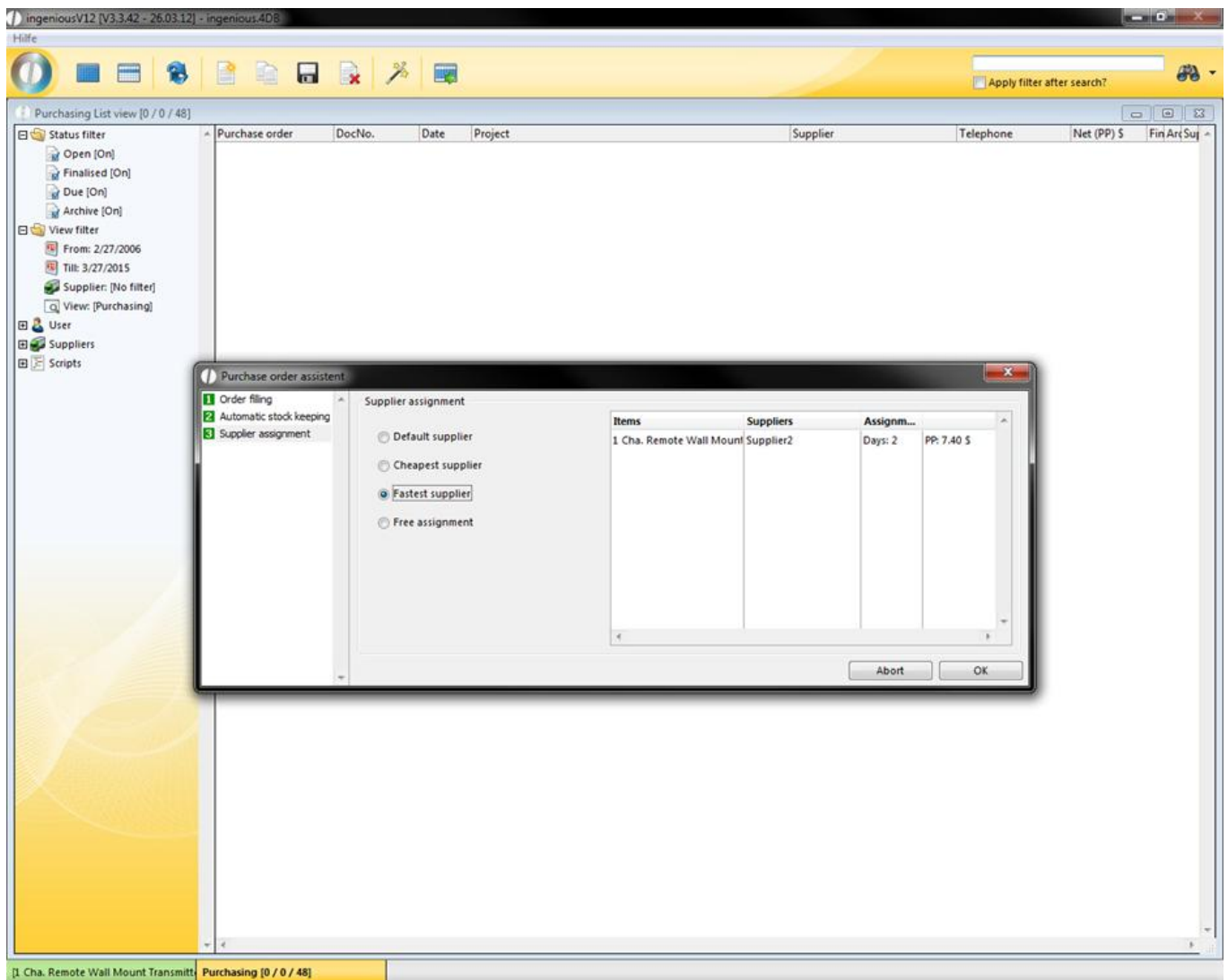
In addition you lodge in prices the purchase price for the item according to this supplier.



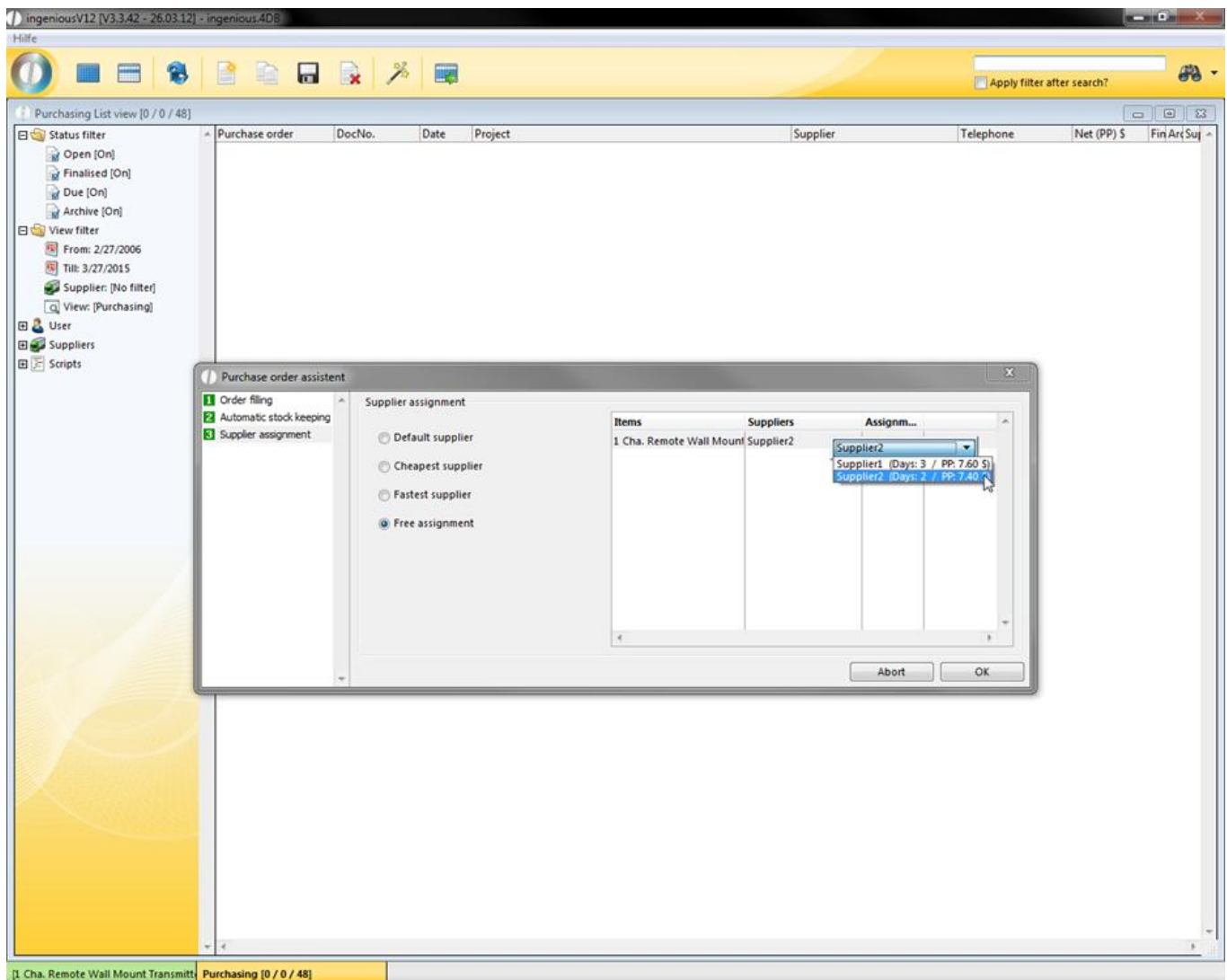


For example, this feature is really helpful for the purchase order assistant in the “Purchasing” module, where you can choose from the created suppliers (condition: “automatic stock keeping” of the item, see 4.4.1.1), like in the following example.



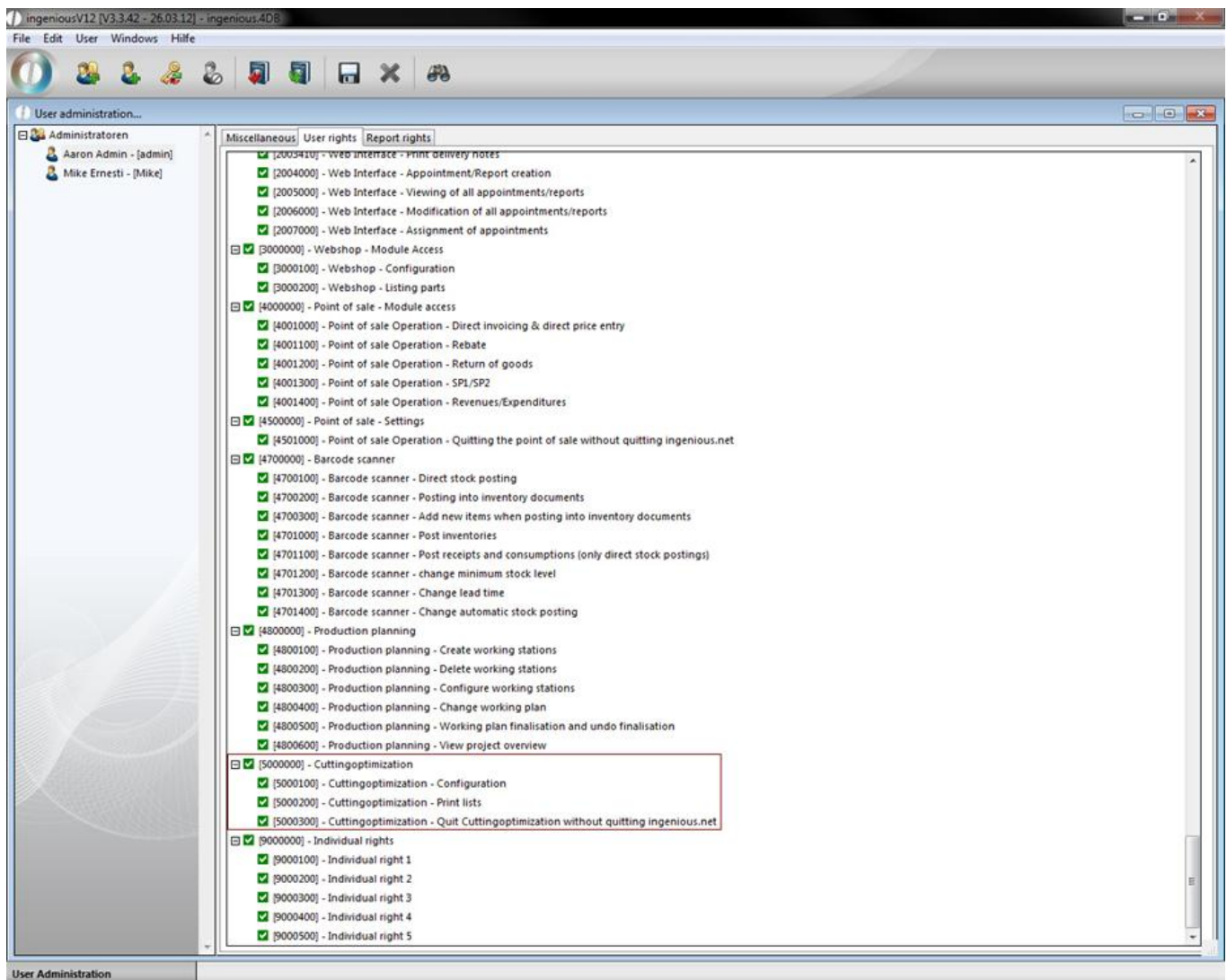


If you select "free assignment" you can choose between all created suppliers by double clicking the line.

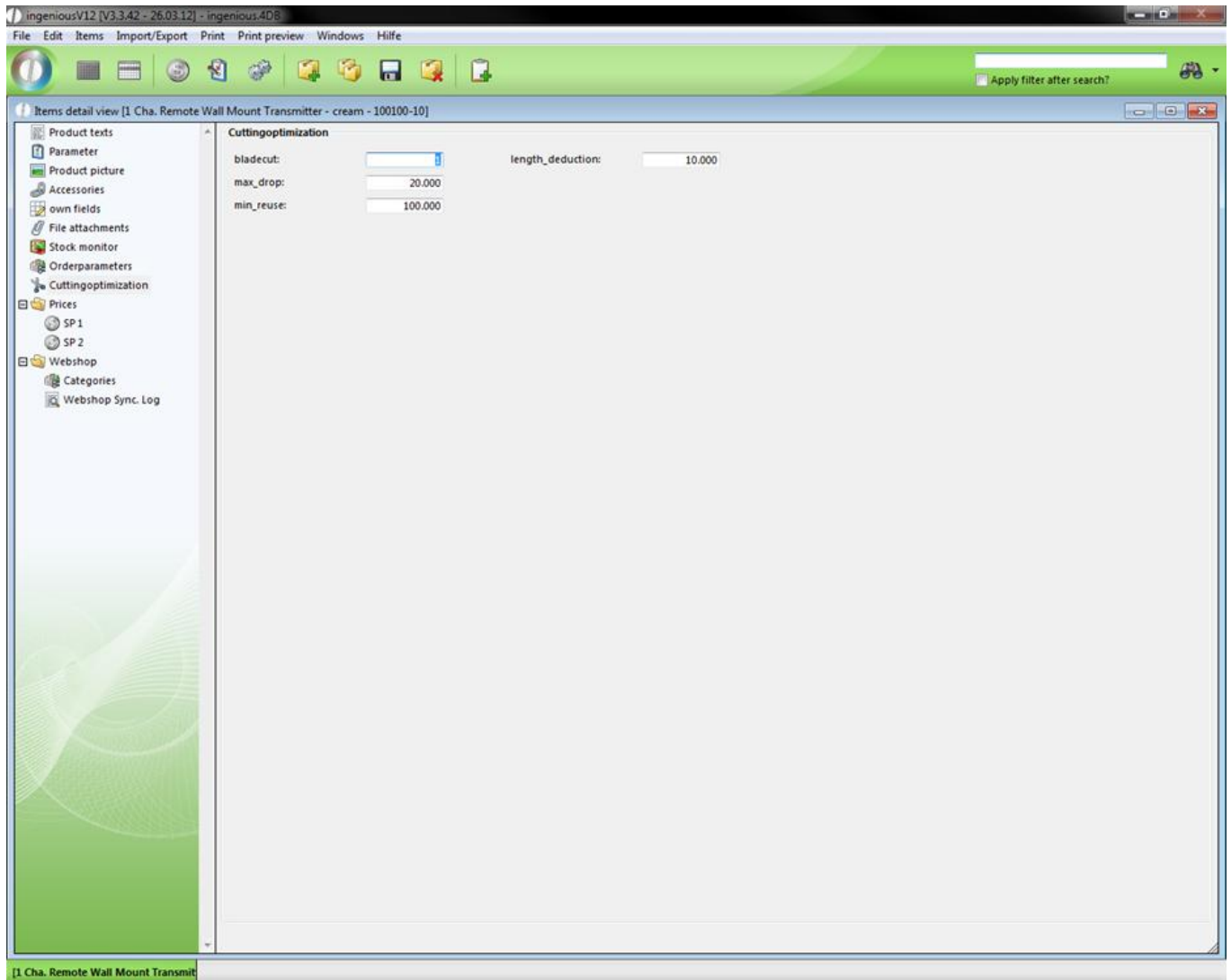


3.2.2.10 Cutting optimization parameters

The column, "Cutting Optimization" is particularly meaningful with items sold by the meter. This is only visible if you have activated the appropriate rights in the user administration.



Moreover, the additional management tool, “Cutting optimization” appears in this connection in the main menu. In addition, it is important that you set a checkmark in the field, “Cutting optimization”.



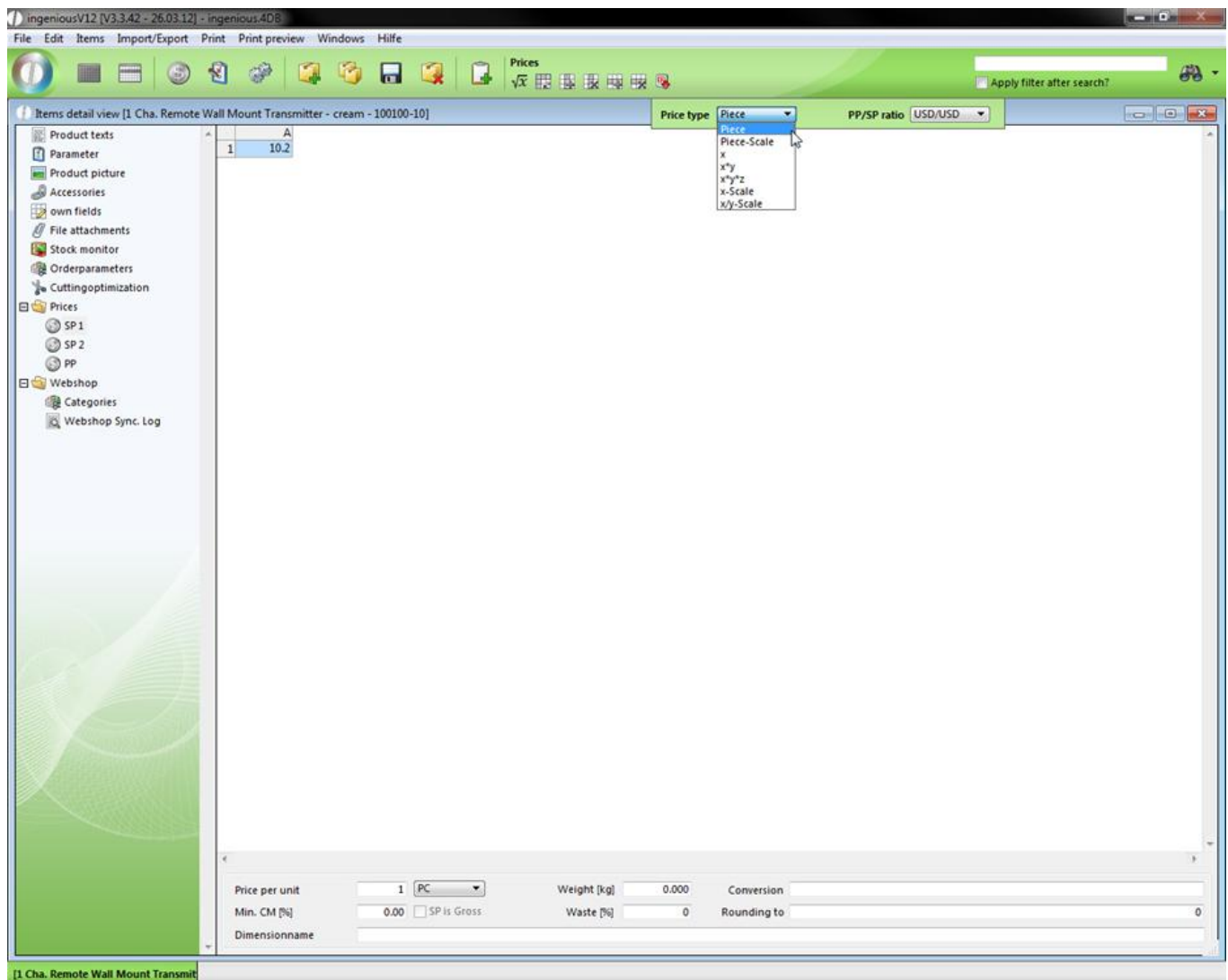
In the field, "Bladecut", you indicate how much centimeter loss is made by cutting the commodity. In the field, "Maximum drop", it will be determined starting from which length the commodity can be thrown away and, as specified last, starting from which length the item can be used again in inventory or if it can be used again at all.


3.2.2.11 Prices

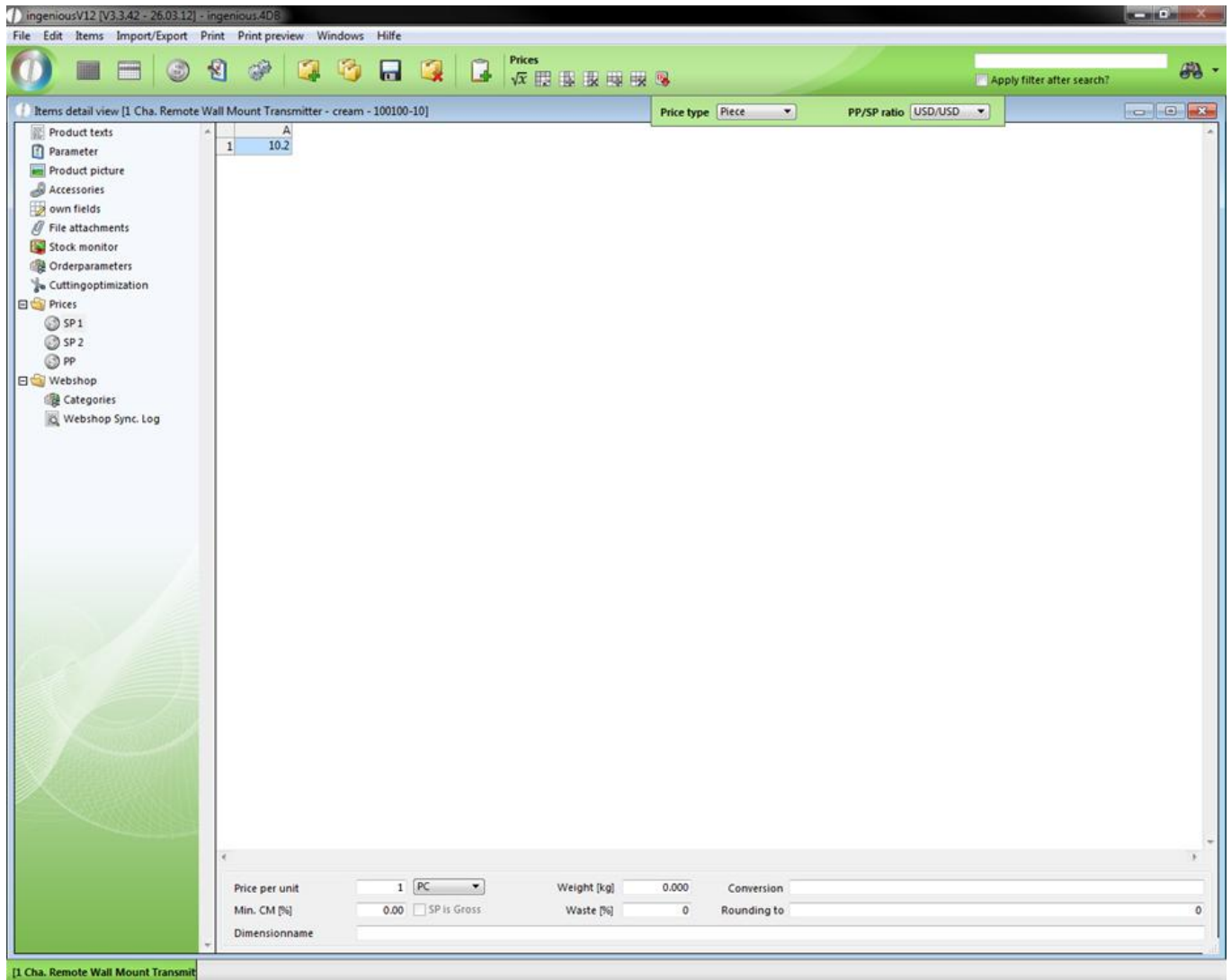
Undisputedly, the price belongs to the most important data that you can save to an item. In Ingenious.V12, the three price columns are organized under "Prices" according to "SP 1", "SP 2" and "PP" for clarification reasons.

SP 1

The "SP 1" (= selling price 1) forms the most important quotation aside from "PP" (= purchase price). In the column with the same name, you can of course give the price and price-specific data to the product.



So you can see for example the "Price type" and the "PP/SP ratio", when you click on . In the lower part of this column you will still find other numerous input and selection fields, with which price settings can likewise be updated. These settings also completely apply to the "SP2" and partially to the "PP". For a better understanding a marked illustration follows:



More fields in the SP 1 column

(1) Indication of the unit for the price calculation, ex.: 1m

(2) Sales price is gross

(3) Conversion = Possibility to convert the included price, i.e. with premiums or rebates; Numbers with readjustments" % will be added by percentage, without, "%" as fixed premiums

Example:

-10% (Reduce price by 10 percent)

10% 5% (Add 10 percent to the price and after another 5 percent),

-5% 3.5 (First take 5 percent from the price and then add 3.50 €)

(4) Determining of the rounding parameters

Example:

0.50 (Always round to 50 cents)

1.00 (Always round to total 1,-€)

20 (Always round to 20 €)

(5) Weight of a production unit (Piece, m, sqm) in kg

Example: 0.10 (= 100 g)

(6)The indication concerning the cut (in particular with longitudinal items); serves the inventory, even if the cut is to be considered in the purchase price. Then an additional entry is necessary in the field "Conversion" in the column "PP" (this is automatically created during the entry of a cut)

Example:

2 (2% of the unit is lost during the cut)

(7)Specify the minimum amount covered = minimum amount covered, which must be achieved for the product, in a percentage; the shortage is reported to the position registration in the contract

Example:

20 (20 percent profit margin)

(8)Entry of the measurement reference, Example: Length

SP 2

The "SP 2" is an alternative sales price. It can be used just like the "SP 1". As in the columns "PP" and "SP 1", a tool bar is also located over the table for the price entry. It is only completely available however if "X/Y scale" is set up (partly at "X scale") at the price type.

An overview for the explanation of the tools is as follows:



Open a window with which you can automatically fill the price table (Matrix).



Exchange the X/Y values with each other.



Enter a new column in the price table to the left of the marked cell(s).



Remove the current column.



Enter a new row over the marked cell(s).



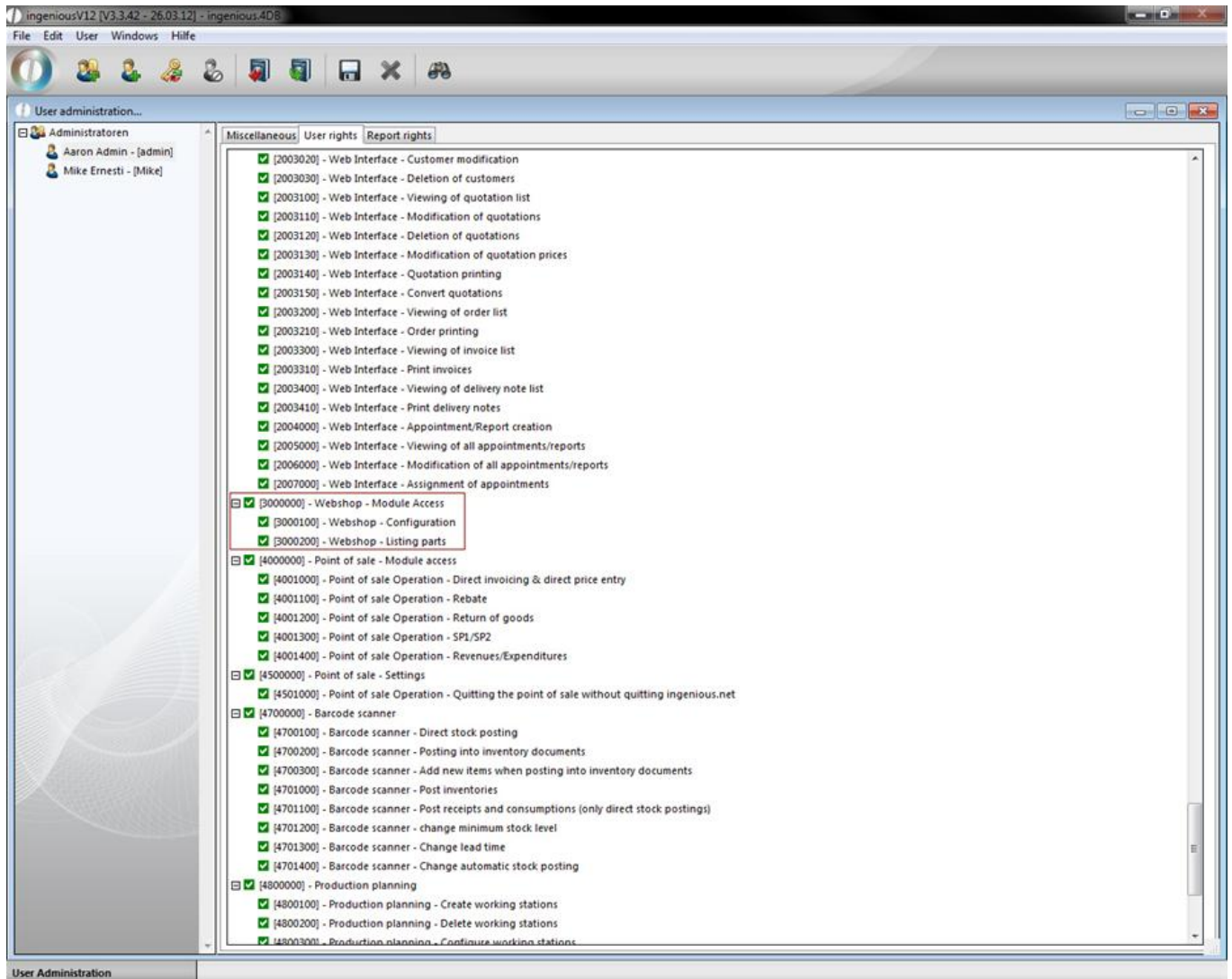
Remove the marked row from the price table.

PP

The setup possibilities in the column, "PP" are (as long as available) identical with those of the column, "SP 1".

3.2.2.12 Webshop

The column, "Webshop" is only visible when you have activated the corresponding user rights in the user administration.



In addition, the additional administrative tool, “Webshop configuration” appears in the main menu under “Other”, which will not be described in this document. If you have any questions about it, feel free to contact the Ingenious GmbH.

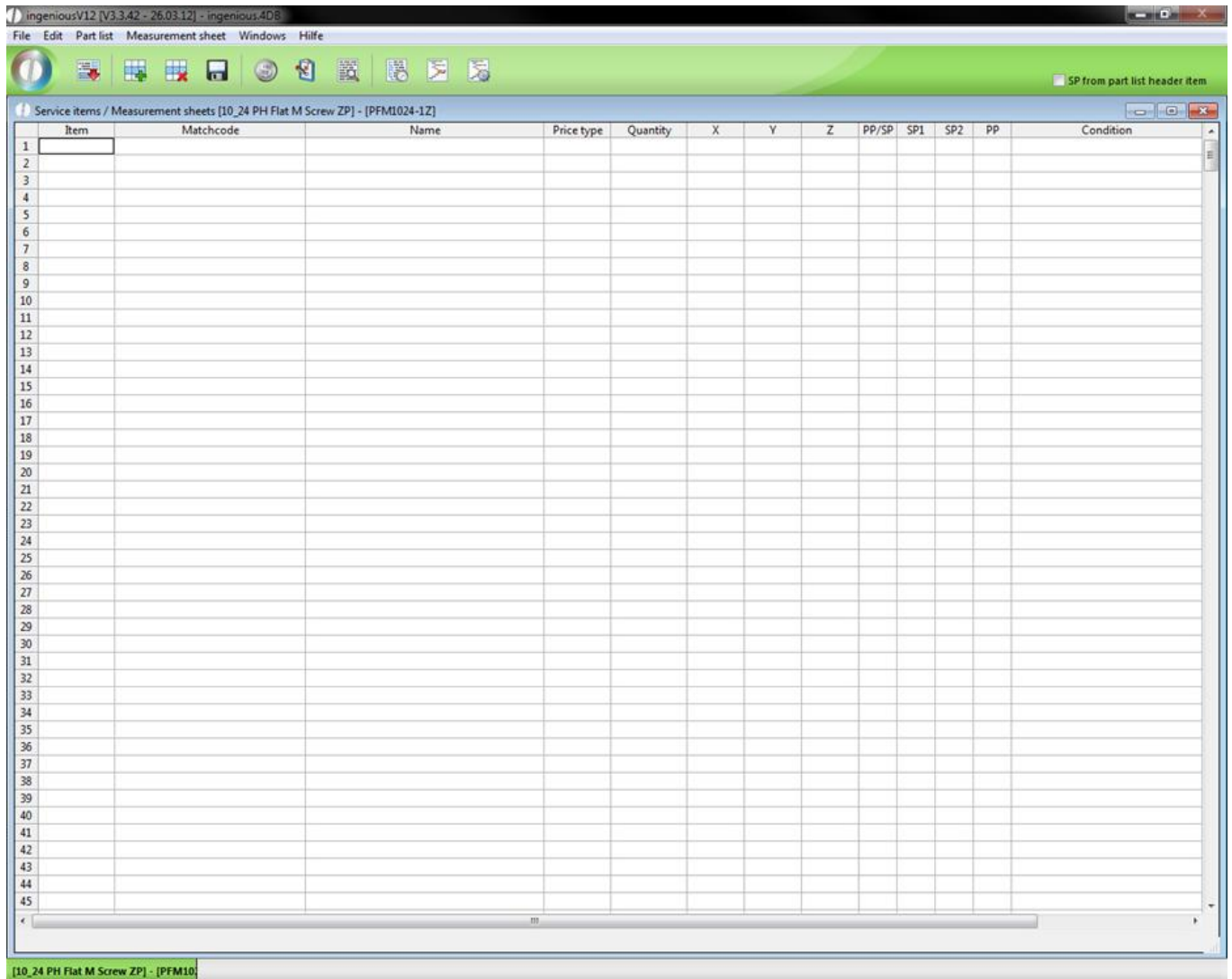
3.2.3 Partlists

3.2.3.1 Creating partlists

A parts list is, so to speak, the table of contents of a product which is produced or arranged by your company. All items and services flow in onto this parts list. Therefore, products that have a parts list have no fixed price. This varies on the basis of different measurements, parts and declared values of the comprised positions (item and services). However, outwardly a parts list appears always as a single item. Also, the internal use is the same as that of an item. In order to be able to program a parts list, one must know how such a parts list is processed, what the variables, place holders and operators are, and which of them are available.

Processing of the parts list

Ingenious.V12 covers the entire parts list line by line from the top.



View of the editing activity

First the cell, "Condition" of the corresponding row is always checked. If no condition exists or if the condition applies, the row is edited. If the condition does not apply, then the Ingenious.V12 row is completely ignored or skipped.

Place holder for parts lists

First it has to be clarified, what the differences between place holders and variables are.

1. The names of the place holders are predetermined.
2. Place holders are always automatically allocated with a value.
3. The content of the place holders can not be directly changed.

There are a lot of place holders in Ingenious.V12 that are used in the parts lists and are briefly listed here:

jum.x First measurement of the parts list

i.e. The width of the surface of the blind

jum.y Second measurement of the parts list

i.e. The height of the surface of the blind

jum.z Third measurement of the parts list

i.e. The depth of the surface of the blind

jum.m Number of parts lists

i.e. Number of blinds

jum.SP Continuous sum of the selling price

i.e. Current selling price of the blind

jum.PP Continuous sum of the purchase price

i.e. Current purchase price of the blind

Variables of parts lists

In contrast to place holders, variables can be provided with an individual name. In order to do this, you must only enter the desired variable name in the column, "Pos".

Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1 Revision		1.2.96	0									
2		Abort("number of shutter is zero")	0									(jum.m=0)
3 PriceListPrefix		tab(jum.UsePriceList)("current";";")	0									
4 StockPostFix		tab(jum.Stock)("FL";"FL";";")	0									
5 Split		tab(jum.Split Number)("none";"Master";1;0;ju	0									
6 BaseSlat_height		2	0									
7 Hole_Interval		tab(jum.Slattype)("Barracuda";"B-58";"Security	0									
8 Temp_Housing		MACRO(mcr_housing_size)	0									(jum.Boxsize="auto")
9 Temp_Housing		FRMT(jum.Boxsize;"#.#")	0									(jum.Boxsize<>"auto")
10 Temp_Gdt_type		macro(mcr_tmp_guide_rail_type)	0									(jum.Rail="auto")
11 Temp_Gdt_type		MACRO(mcr_tmp_rail_type2)	0									(jum.Rail<>"auto")
12 Temp_Gdt_type		1Super Maxi	0									(jum.Slattype="SL-77")
13 Total_height		jum.y + tab(jum.Measurements)("Clear Openin	0									
14 Total_height		num(Total_height)	0									
15 Total_width		tab(Split)(0;jum.x;jum.total width) + tab(jum.N	0									
16 Total_width		num(Total_width)	0									
17 Shutter_width		jum.x + tab(jum.Measurements)("Clear Openin	0									
18 CurtainWeight		tab(jum.Slattype)("RC-42";"custom";"B-58";"S	0									
19 Total_weight		Total_height*Shutter_width*CurtainWeightPer	0									
20 Shutter_Weight		Total_height*Shutter_width*CurtainWeightPer	0									
21 Shutter_Weight		num(Shutter_Weight)	0									
22		"wpsqft" = CurtainWeightPerSqm + " test": Tot	0									(1=2)
23 Op_Motor		(jum.Operator="Motor") or (jum.Operator="M	0									
24 RC_Motor		(jum.Operator="Motor RTS") or (jum.Operator	0									
25 Axle_type		tab(jum.Slattype)("Screen";"SL-77";60;70;tab((0									(jum.axle="auto")
26 Axle_type_help	AxleSizeManual		6	1/jum.m	jum.x	jum.y		0	0	0	0	
27 Axle_type_help	AxleSizeMotor		6	1/jum.m	jum.x	jum.y		0	0	0	0	(Op_Motor) or (Split)=0)
28 Axle_type		rnd(Axle_type_helper.vk0)	0									(jum.axle="auto")
29 Axle_type		tab(jum.Slattype)("SL-77";"B-58";"RC-60";70;6	0									(jum.axle="auto") and (op_Motor) a
30 Axle_type		tab(Axle_type_helper.vk)(50;60;Axle_type_helpe	0									(Split)=0)
31 Axle_type		60	0									(jum.Slattype="RC-55") and (Axle_ty
32 Axle_type		MID(jum.Axle;1;2)	0									(jum.axle="auto")
33 Axle_type		60	0									(jum.axle="auto") and (Axle_type=4
34 Axle_material		tab(jum.Axle)("50alu";"40alu";"60alu";"70alu";	0									(jum.axle="auto") and (jum.Operato
35 Axle_material		"Galvanized"	0									
36 Motor_type		MACRO(mcr_Motor_type)	0									(jum.Slattype="Screen")
37 Motor_type		1506	0									(jum.Motor Brand="Hammerhead")
38 Motor_type		1550	0									
39 motor_brand		tab(Motor_type+jum.Operator)("510Motor RT	0									
40 Housing_size	"HousingSize" + jum.Slattype + " Axl		5	1/jum.m	Total_heig			0	0	0	0	(jum.Boxsize="auto")
41 Housing_size	"HousingSize" + jum.Slattype + " Axl		5	1/jum.m	0.9*Total_I			0	0	0	0	
42 Housing_size		FRMT(Rnd(Housing_size_helper.vk1);"#.#")	0									(jum.Boxsize="auto")
43 Housing_size		FRMT(jum.Boxsize;"#.#")	0									(jum.Boxsize<>"auto")
44 Housing_size		num(Housing_size)	0									
45 Total_height		jum.y + tab(jum.Measurements)("Clear Openin	0									

In this way you can assign the value from the field, "Name" (from the same line) to the variable. You can now use this variable in other fields to calculate prices, measurements or amounts.

Operators of parts lists

To calculate the variables or place holders, the common mathematical operators "+", "-", "*", "/" and "()", as well as the trigonometric functions, "SIN", "COS", "TAN" are available to you in Ingenious.V12.

Example: $\sin(45) = 0.7071$

$\cos(45) = 0.7071$

$\tan(45) = 1$

Furthermore, there is still the modulo operator ("MOD") and the integer division ("").

With an integer division, a whole number (without decimal places) always comes out.

Example: $5 \setminus 3 = 1$ (1.66~)

$9 \setminus 3 = 3$ (3.0)

$9 \setminus 2 = 4$ (4.5)

The Modulo Operator gives back the rest of an integer division as a value.

Example: $(5) \% (3) = 2$

$(9) \% (3) = 0$

$(9) \% (2) = 1$

In addition, the operators of the return of the arc tangent (atn), the exponents (exp), the natural logarithm (log), the root (sqr) and the absolute amount (ABS) are available.

Example: $\text{atn}(45) = 1,5485$


$\text{exp}(45) = 3,49342\text{e}19$

$\text{log}(45) = 3,8066$

$\text{sqr}(45) = 6,7082$

$\text{ABS}(-45) = 45$

3.2.3.2 Creating checklists

Checklists are programmable query windows that provide parts lists information on the desired variation of the product. Checklists are created with the button,  for "Show and edit basic item data and checklists" in the window "Basic item data [...] editing...". Checklists can be provided with checkboxes for entry fields, selection fields (lists) and Yes/No query fields. In order to do this, the field names, have to be provided "?" or entered "???" in the "Description" column. The number of the question marks decides whether the field is still changeable later as a multi position in the project positions (? changeable?? not changeable). With the field names, values will be assigned later to the parts list. In the column, "Value", the fields must be defined and perhaps be provided with contents. If you want to have a selection field with a certain number of defined selection possibilities, write "dropdown =" and separate the selection possibilities with a comma. If you want a selection field in which the user also can enter his own selection possibility, write only "combobox" = instead of "dropdown=". Next to the checkboxes, you write either "Yes/No" or "No/Yes". The difference is that with "Yes/No", a check mark is already placed in the field, and with "No/Yes" it is not. If you would like to define a normal input field, simply leave the field in the "Value" column empty.

The screenshot shows the 'Modifying key product data [demo_item]...' window in the ingenious.V12 software. The window has a menu bar (File, Edit, Windows, Hilfe) and a toolbar. It contains two main data entry sections:

Type data

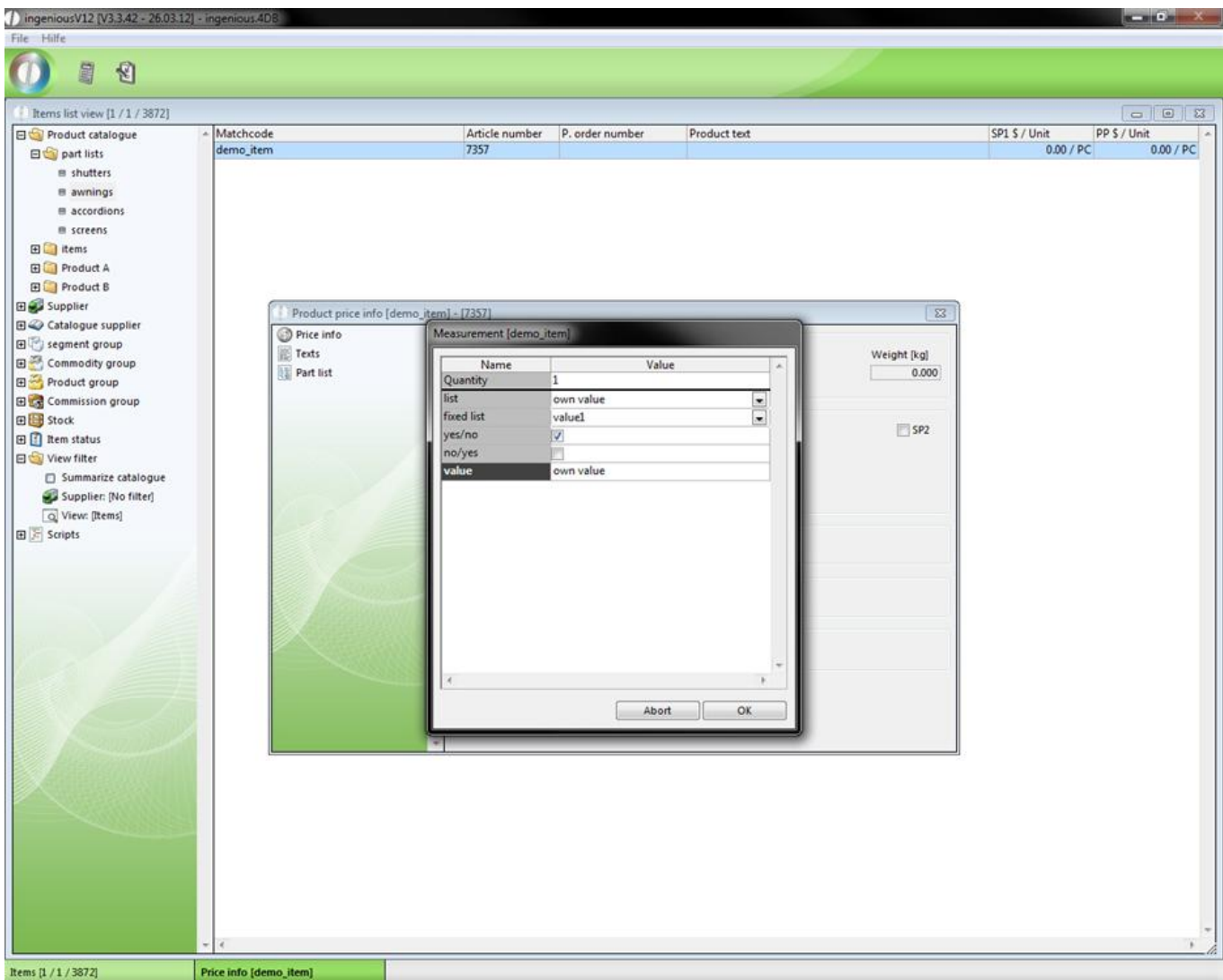
	Name	Value
1		
2		
3		
4		
5		
6		
7		
8		

Product main data / Check list

	Name	Value
1	??list	combobox=value1, value2, value3
2	??fixed list	dropdowns=value1, value2, value3
3	yes/no	yes/no
4	no/yes	no/yes
5	value	
6		
7		
8		
9		
10		
11		
12		
13		
14		
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35		

The status bar at the bottom shows '[demo_item] - [7357]'.

View of the checklist



Commands in the checklist programming

The implementation of commands in checklists is possible. Just as a “?” stands at least before a field name, commands are initiated by a “=“.

“Visible”

With the command “=Visible”, you can show or hide fields of the checklist.

	Name	Value
1	=visible MotorTyp	MotorTyp="Motor_1"

“Set”

The command “=Set” can change the value of any field. The field “Electric motor” is a checkbox. This always has the value “0” (no checkmark) or “1” (checkmark set).

	Name	Value
2	=set MotorTyp="Motor_1"	Electric Motor=1

“Okend”

Error messages can be created with the “Okend” command. With this command, the conditions will first be tested when the “OK” button of the checklist is applied.

	Name	Value
3	=OKEND "Please choose a type from the dropdown list above"	NOT (Type="")

"Msg"

A second possibility to generate an error message is with the "Msg" command. This differs from "OKend" in that in every change that the user makes, the condition is checked and is immediately given an error messages when applied.

	Name	
4	=MSG "Please choose a type from the dropdown list above"	NOT (Type="")

"_Height"

You can determine the height of the checklist with the "_Height" command. The designation operates in pixels.

	Name	
5	=_HEIGHT 400	

"_Width"

With "_Width" the width of the checklist can be determined.

	Name	
6	=_WIDTH 200	

"_Split"

With the "Split" command, you can fix the width of the individual columns. Indeed, here 140 pixels are given as 14,220 pixels as 22, etc. Note, however, that the "_Width" command is ineffective with the following picture because under it stands the "_Split" command which defines a substantially larger area. The rule of thumb is: "The last command counts!"

	Name	Value
6	=_WIDTH 200	
7	=_SPLIT 13 7	

"Fore color" and "Back color"

In order to assign color to fields, you can do this with the help of the key words, "Forecolor" and "Backcolor".

	Name	Value
6	?attention; FORECOLOR=red	Delivery time is 2 weeks!

See the following example of the commands:

The screenshot shows the 'Modifying key product data [demo_item]...' window in the ingenious.V12 software. The window has a menu bar (File, Edit, Windows, Hilfe) and a toolbar. It contains two main data entry sections:

Type data

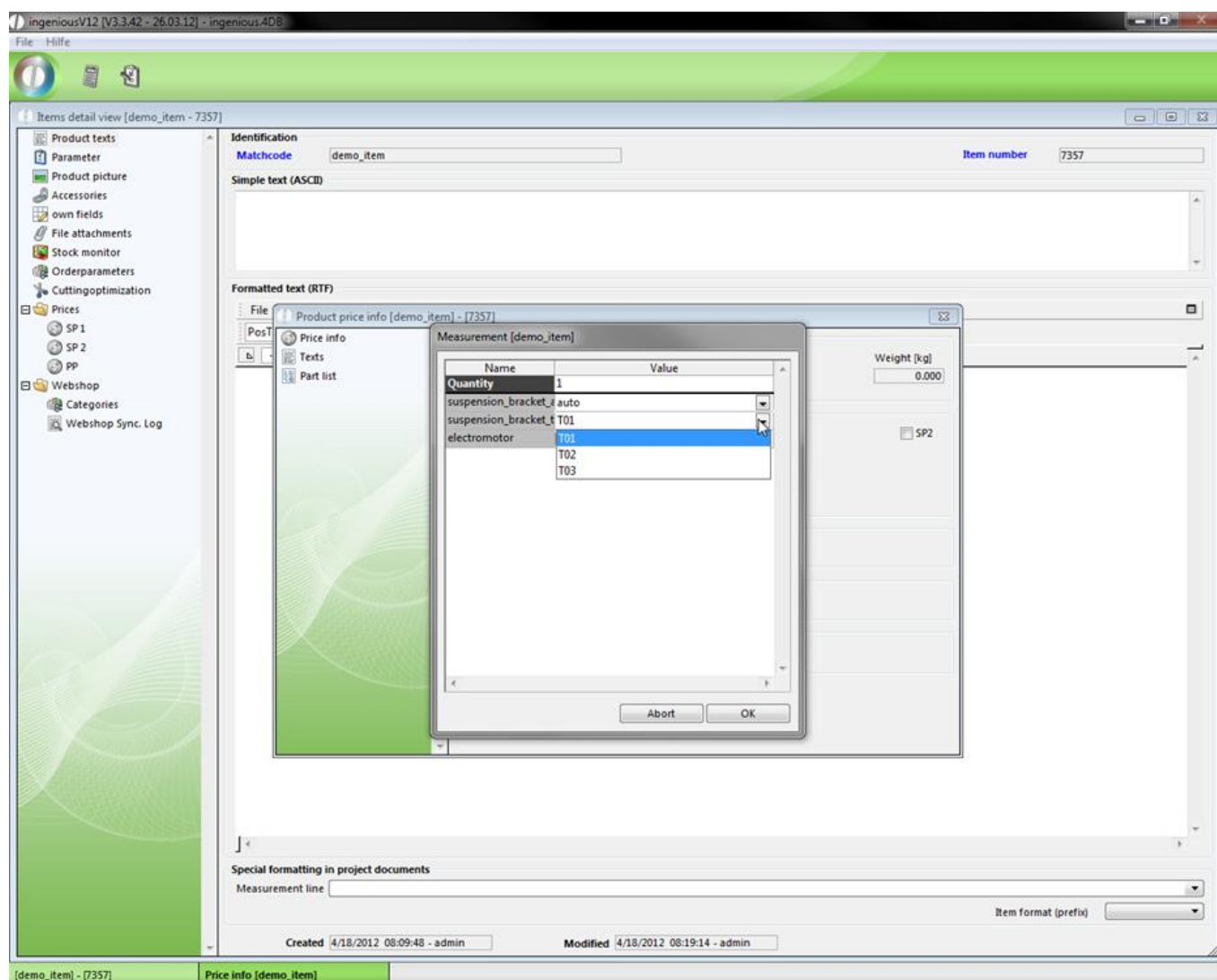
	Name	Value
1		
2		
3		
4		
5		
6		
7		

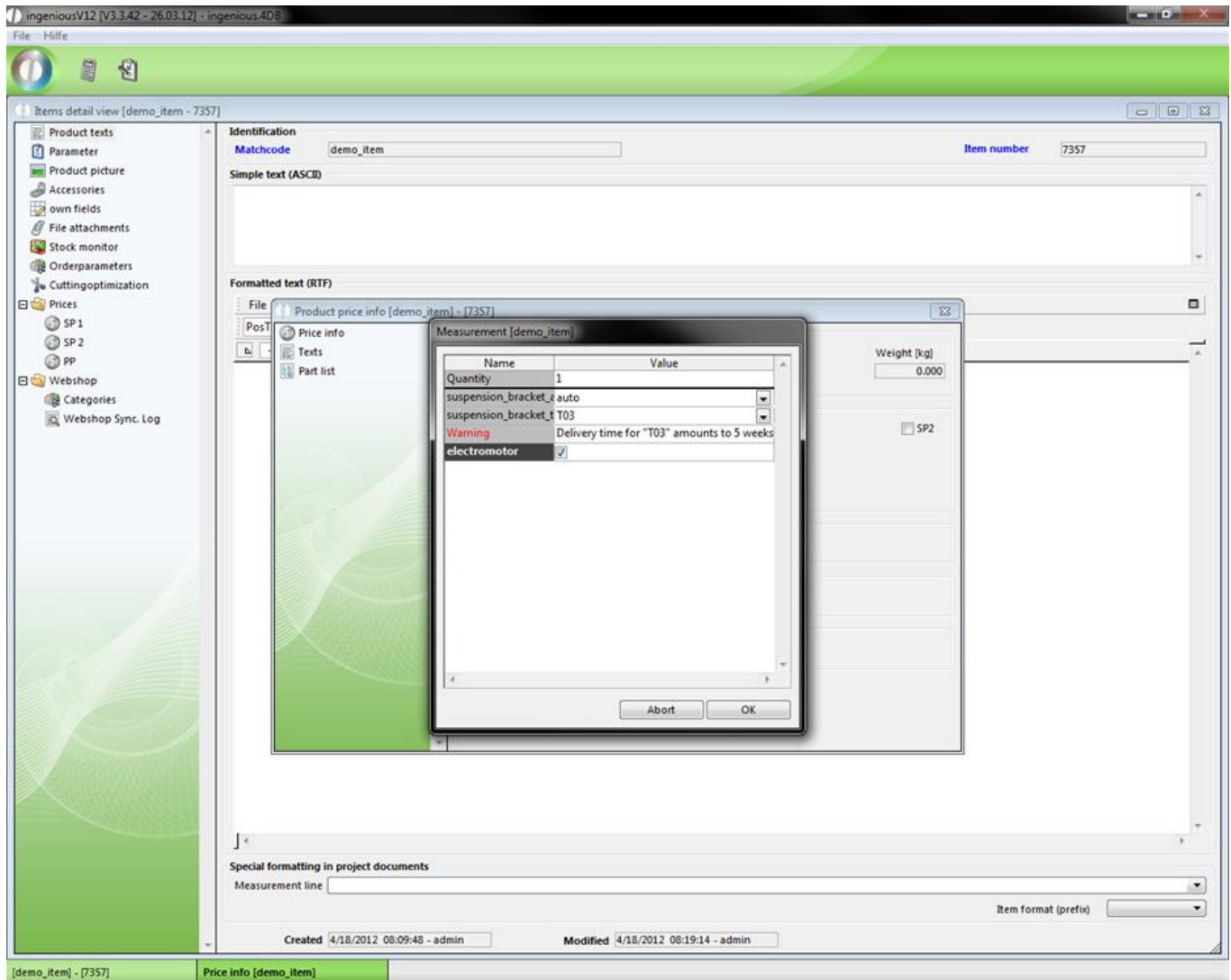
Product main data / Check list

	Name	Value
1	??suspension_bracket_amount	combobox=auto
2	??suspension_bracket_type	dropdown=T01,T02,T03
3	Warning: forecolor=red	Delivery time for "T03" amounts to 5 weeks!
4	??electromotor	no/yes
5	=visible Warning	suspension_bracket_type="T03"
6	=set suspension_bracket_type="T03"	electromotor=1
7		
8		
9		
10		
11		
12		
13		
14		
15		
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The status bar at the bottom shows '[demo_item] - [7357]'.

If you now click in the checklist on the "Electric motor" field, "Deco 03" is automatically placed with "Ceiling Mount_Type". This can only be changed only if one again removes the check. In addition, the row "Attention" appears as soon as "Deco 03" is selected ".






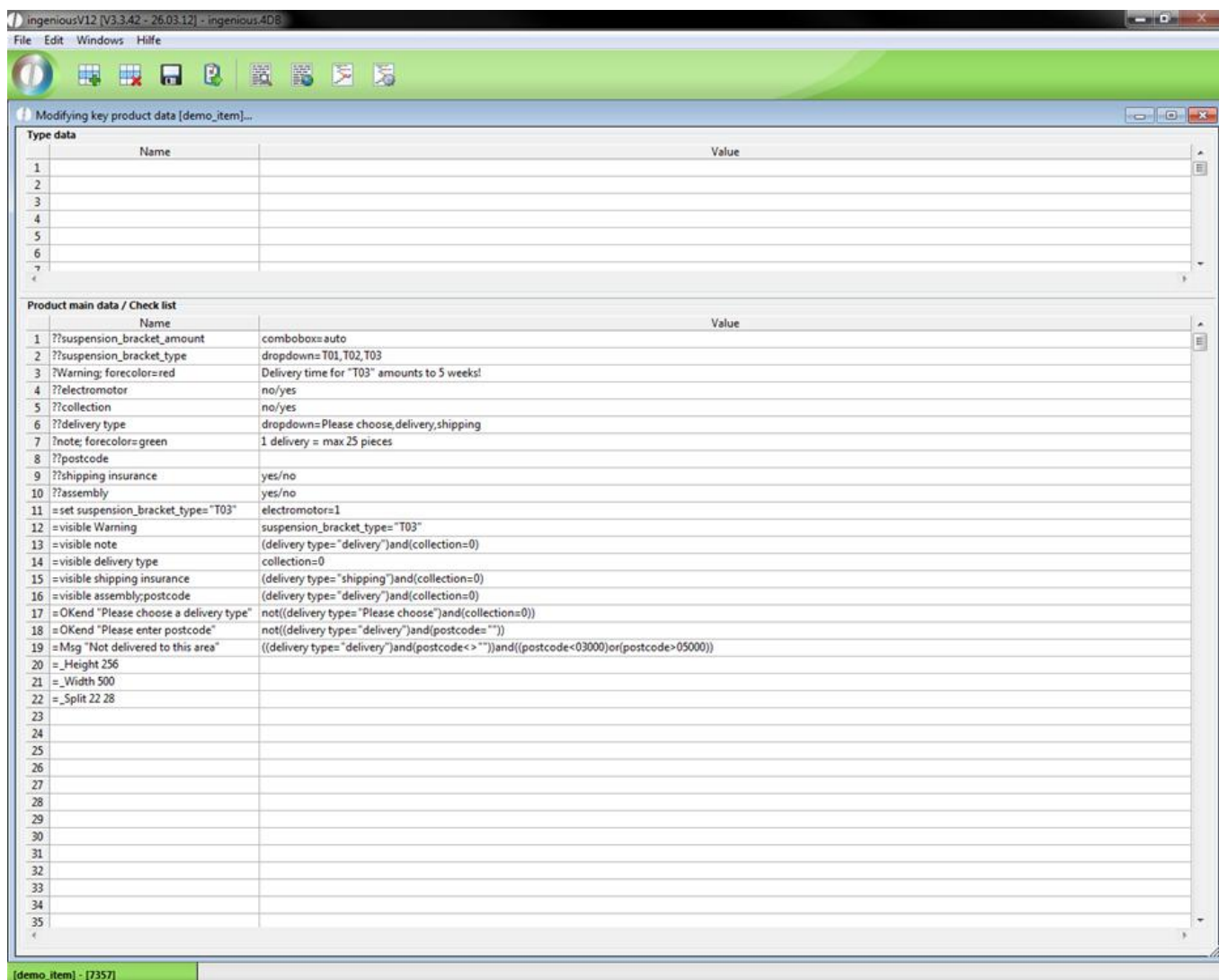
Two views of the measurement window

To make the start with the parts list programming a little easier, a short exercise follows. Here you should provide a parts list for a vertical blind. In the list, the kind and the number of ceiling mounts as well as the delivery for the suitable Venetian blinds should be taken into consideration.


Practice creating parts lists

In order to create a parts list, you first need a blank item file in which this example will be calculated as a square meter price (sqm price).

1. Add a new item with the matchcode, "D-Vertical Blinds".
2. Click on the  button in order to create a checklist and prepare it according to the following illustration.



View of the finished checklist

3. Save the checklist and click in the detailed view of the item provided on the button  "Edit service positions and test parts lists" in order to be able to now begin with the programming of the parts list.

The following window appears:

Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1	BP	(jum.m) vertical blind(s) with	3	1	jum.x	jum.y		0	0	0	0	
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
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41												
42												
43												
44												
45												

The field price type was automatically filled with the figure "3". The reason for that is that the item "Vertical Blind" has a square meter price. In order to guarantee the clarity in the parts list programming (place to save) the price types and price ratios are shown in transformed numbers. Besides, the following relations apply to the price types: 0 = piece, 1 = piece scaled, 2 = x, 3 = x/y, 4 = x/y/z, 5 = x scaled, 6 = x/y scaled price.

5. Next the parts list should calculate the number of the required ceiling mounts. Besides, you should take into consideration what the user has entered in the field "CM_Pce" of the checklist. Because this field is a "list", the user can choose between the value "Auto" (automatic calculation) and an individual value. Now define the variable "CM_Pce" and write the following formula in the field "Name": `tab (jum.x) (100; 150; 2; 3; (jum.x\50))`

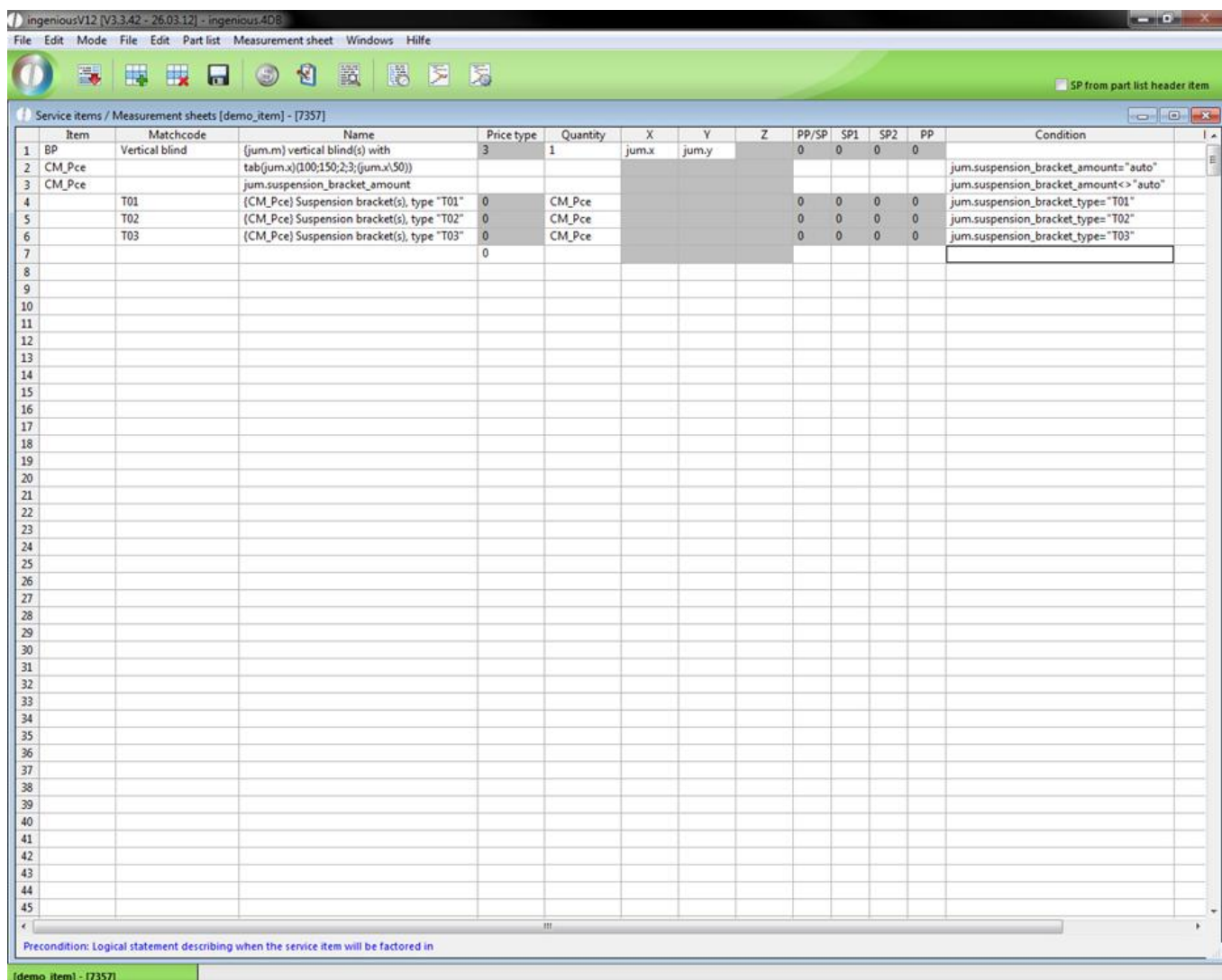
A tab command is a "If-Then" command (in the computer language "C" or "C++" is comparable with a "Case" command). In this example it means if "x" (the width of the Venetian blind) is ≤ 100 , then the "CM_Pce" should be 2. If "x" is ≤ 150 , then "CM_Pce" should be 3. In case "x" is neither ≤ 100 nor ≤ 150 , then the division \ should be divided into whole numbers ("") by 50 (= "Default" value in "Case" command).

6. Attach the formula to the following condition: `jum. CM_Piece = "auto"`. With that, you determine that only this row is implemented if the value "Auto" was selected in the field, "CM_Piece".

7. The next line should intercept in the case that the user gives his own number of cover fixtures. Define the variable "CM_Pce" again and enter the opposite condition of the preceding line: `jum. CM_Pce <> "auto"`. With the command "jum. CM_Pce" in the cell "Name", you decide that the variable "CM_Pce" is filled with the value which the user has entered in the checklists field "CM_Pce".

8. Now you have determined the number. Now you must still notify the parts list of the corresponding types. In addition, in the next three lines you enter (in the column "matchcode") one of three prepared items by Ingenious.V12:

"Deco 01", "Deco 02" or "Deco 03". The lines are indeed completed again and you must enter the variable "CM_Pce" calculated by us in the "Quantity" column. Even here you enter the suitable text "{CM_Pce} cover holder of the type "Deco 01" as a description in the "Description" column. As a condition you also carry the formula corresponding to the item "jum. ceiling mount_Type = "Deco 01", " ... Deco 02 " or" ... Deco 03".



Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1	BP	{jum.m} vertical blind(s) with	3	1	jum.x	jum.y		0	0	0	0	
2	CM_Pce	tab(jum.x)(100;150;2;3;(jum.x\50))										jum.suspension_bracket_amount="auto"
3	CM_Pce	jum.suspension_bracket_amount										jum.suspension_bracket_amount<="auto"
4	T01	{CM_Pce} Suspension bracket(s), type "T01"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T01"
5	T02	{CM_Pce} Suspension bracket(s), type "T02"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T02"
6	T03	{CM_Pce} Suspension bracket(s), type "T03"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T03"
7			0									
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
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43												
44												
45												

Precondition: Logical statement describing when the service item will be factored in

[demo_item] - [7357]

9. Since there is the possibility to order an electric motor in the checklists, enter "Electric motors" in the matchcode cell. After the line is completed again, you only must enter one more condition "jum. electric motor=1". This should also be described again briefly ("and electric motor") in the "Description" column.

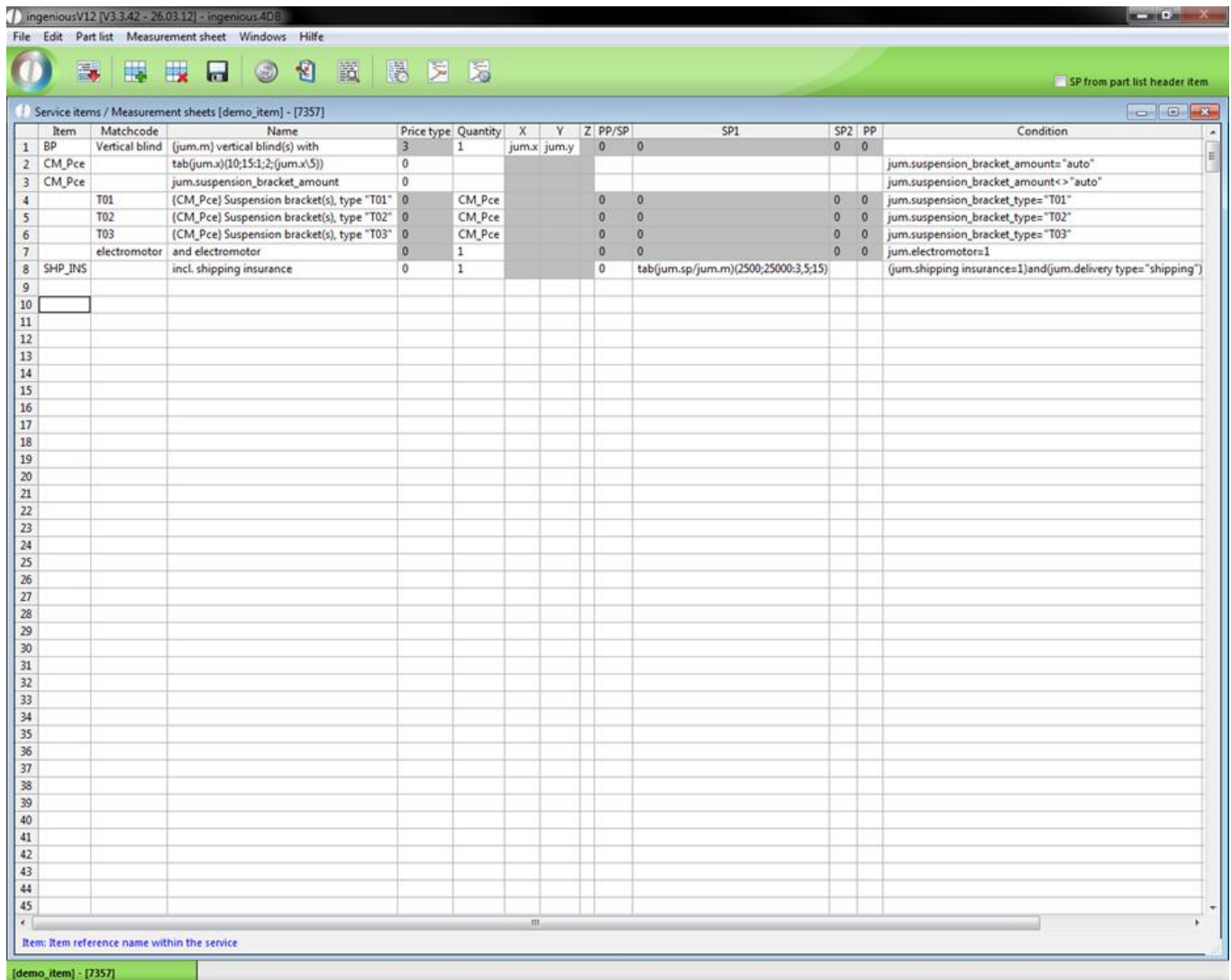
Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1 BP	Vertical blind	{jum.m} vertical blind(s) with	3	1	jum.x	jum.y		0	0	0	0	
2 CM_Pce		tab(jum.x)(100;150;2;3;(jum.x\50))										jum.suspension_bracket_amount="auto"
3 CM_Pce		jum.suspension_bracket_amount										jum.suspension_bracket_amount<="auto"
4	T01	{CM_Pce} Suspension bracket(s), type "T01"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T01"
5	T02	{CM_Pce} Suspension bracket(s), type "T02"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T02"
6	T03	{CM_Pce} Suspension bracket(s), type "T03"	0	CM_Pce				0	0	0	0	jum.suspension_bracket_type="T03"
7	electromotor	and electromotor	0	1				0	0	0	0	jum.electromotor=1

With the checkboxes, as it is with the field, "Electric motor", the value "1" stands for yes (checkmark). And the value "0" stands for no (no checkmark).

In order to find a position later in the parts list, you have by now entered the existing items from the database into the matchcode cell. Now with the following positions "Shipping insurance", "Delivery" and "Assembly", you should become familiar with another possibility.

10. In our checklist, shipping insurance is optionally offered (by check box). In order to have this shown later in the parts list, although no item for it exists, you must enter a number between 0 and 4 in the "PP/SP" column. With which PP/SP the item should be calculated is according to this number. Thereby, the following relation applies: 0 = EUR/EUR, 1 = EUR%, 2 = %/EUR, 3 = min-item 4 = LE-item. With the entry of a price ratio, you instruct Ingenious.V12, to show this row later in the parts list.

11. Furthermore, attach the variable, "SHP_INS" that is to be later included in the parts list and enter the name ("incl. shipping insurance") in the "Description" column. In order calculate a price for this position, insert the formula "tab (jum.SP/jum.m) (2500; 25000:3,5; 15) " in the column "SP 1". With that, you assign the value "3.5" to the variable, "VER_VER" if the selling price per blind is <=2,500. (*Attention: "SP" is calculated up to the current position in the parts list*). If the "SP" is < =25,000 it is calculated as 15 \$ per piece to the contact for the shipping insurance. Since it is very unlikely that a vertical blind will cost more than 25,000 \$, an error correction ("SP" > 25000) is not really necessary. Whoever wants to include this can nevertheless play it safe and estimate 0.3% of the insured sum as insurance costs with the formula (change italics) " tab (jum.sp/jum.m) (2500; 25000:3,5; 15; ((jum.SP/jum.m) *0,003))" on the number. In the cell, "Condition", you must now establish that this row is only executed if the user has decided on shipping the Venetian blind with shipping insurance. Enter the following linked condition in the cell: (jum. Shipping insurance=1) and (jum. Delivery type = "Shipping")



Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1	BP	Vertical blind	(jum.m) vertical blind(s) with	3	1	jum.x	jum.y	0	0			
2	CM_Pce		tab(jum.x)(10;15;1;2;(jum.x\5))	0								jum.suspension_bracket_amount="auto"
3	CM_Pce		jum.suspension_bracket_amount	0								jum.suspension_bracket_amount<>"auto"
4	T01		(CM_Pce) Suspension bracket(s), type "T01"	0	CM_Pce			0	0	0	0	jum.suspension_bracket_type="T01"
5	T02		(CM_Pce) Suspension bracket(s), type "T02"	0	CM_Pce			0	0	0	0	jum.suspension_bracket_type="T02"
6	T03		(CM_Pce) Suspension bracket(s), type "T03"	0	CM_Pce			0	0	0	0	jum.suspension_bracket_type="T03"
7		electromotor	and electromotor	0	1			0	0	0	0	jum.electromotor=1
8	SHP_INS		incl. shipping insurance	0	1			0	tab(jum.sp/jum.m)(2500;25000;3,5;15)			(jum.shipping_insurance=1)and(jum.delivery_type="shipping")
9												
10												
11												
12												
13												
14												
15												
16												
17												
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12. Click in the ninth line and define the variable "DEL_Q". This stands for "Quantity delivered". In this row, the parts list should calculate the delivery; if a delivery contains a maximum of 25 Vertical blinds (incl. ceiling mounts and motors). For that, you must enter the following comprehensive formula: $\text{tab}(\text{jum.m} \setminus 25 = \text{jum.m} / 25) - 1; 0; (\text{jum.m} \setminus 25) / \text{jum.m}; (\text{jum.m} \setminus 25 + 1) / \text{jum.m}$. With this formula, you first calculate if the number of blinds complies in whole numbers, dividing the sum of the number of blinds by 25. If yes, ("1"), then $(\text{jum.m} \setminus 25) / \text{jum.m}$ is calculated. If no, ("0"), then a 1 is added to the 25.

Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1 BP	Vertical blind	(jum.m) vertical blind(s) with	3	1	jum.x	jum.y		0 0		0 0		
2 CM_Pce		tab(jum.x)(10;15;1;2;(jum.x\5))	0									jum.suspension_bracket_amount="auto"
3 CM_Pce		jum.suspension_bracket_amount	0									jum.suspension_bracket_amount<>"auto"
4	T01	(CM_Pce) Suspension bracket(s), type "T01"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T01"
5	T02	(CM_Pce) Suspension bracket(s), type "T02"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T02"
6	T03	(CM_Pce) Suspension bracket(s), type "T03"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T03"
7	electromotor	and electromotor	0	1				0 0		0 0		jum.electromotor=1
8 SHP_INS		incl. shipping insurance	0	1				0	tab(jum.sp/jum.m)(2500;25000;3,5;15)			(jum.shipping insurance=1)and(jum.delivery type="shipping")
9 DEL_Q		tab (jum.m\25=jum.m / 25) (-1;0;(jum.m\25)/jum.m;(jum.m\25+1)/jum.m)										
10												
11												
12												
13												
14												
15												
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13. Now the delivery can be registered into the parts list. In the row, "Item", enter the variable name "DEL_P" in row 10 enter "Incl. Delivery" in the "Description" row. Now the previously calculated number ("DEL_Q") can be registered into the "Quantity" column. For the price calculation that corresponds to the buyer's zip code, the price is calculated with the formula `tab (jum.PLZ) (3000; 4000; 5000: 70; 60; 55)` in the cell "SP 1". As a condition for this row, it has to be determined that it is only to be considered with "Delivery". In addition, you enter `jum. Delivery method="delivery"` into the cell. Don't forget to fill the rows "Price method" and "PP/SP" with a "0" in each case.

Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1	BP	Vertical blind	(jum.m) vertical blind(s) with	3	1	jum.x	jum.y	0	0			
2	CM_Pce		tab(jum.x)(10;15;1;2;(jum.x/5))	0								jum.suspension_bracket_amount="auto"
3	CM_Pce		jum.suspension_bracket_amount	0								jum.suspension_bracket_amount<>"auto"
4	T01		(CM_Pce) Suspension bracket(s), type "T01"	0	CM_Pce			0	0		0	jum.suspension_bracket_type="T01"
5	T02		(CM_Pce) Suspension bracket(s), type "T02"	0	CM_Pce			0	0		0	jum.suspension_bracket_type="T02"
6	T03		(CM_Pce) Suspension bracket(s), type "T03"	0	CM_Pce			0	0		0	jum.suspension_bracket_type="T03"
7		electromotor	and electromotor	0	1			0	0		0	jum.electromotor=1
8	SHR_INS		incl. shipping insurance	0	1			0	tab(jum.sp/jum.m)(2500;25000;3,5;15)			(jum.shipping_insurance=1)and(jum.delivery ty
9	DEL_Q		tab (jum.m\25=jum.m / 25) (-1;0;(jum.m\25)/j									
10	DEL_P		incl. delivery		DEL_Q/jum.m			0	tab(jum.postcode)(3000;4000;5000;70;60;55)			jum.delivery type="delivery"
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14. Finally, the calculation of the assembly is still inserted into the parts list. Create the variable "MON_P" in row 11 and enter "Description" & "Assembly". Furthermore, enter "Quantity" in the "Quantity" row, switch to the cell, "SP 1" and enter the following formula for the price calculation here: tab (jum.m) (6; 16; 1000;40; 35; 30).

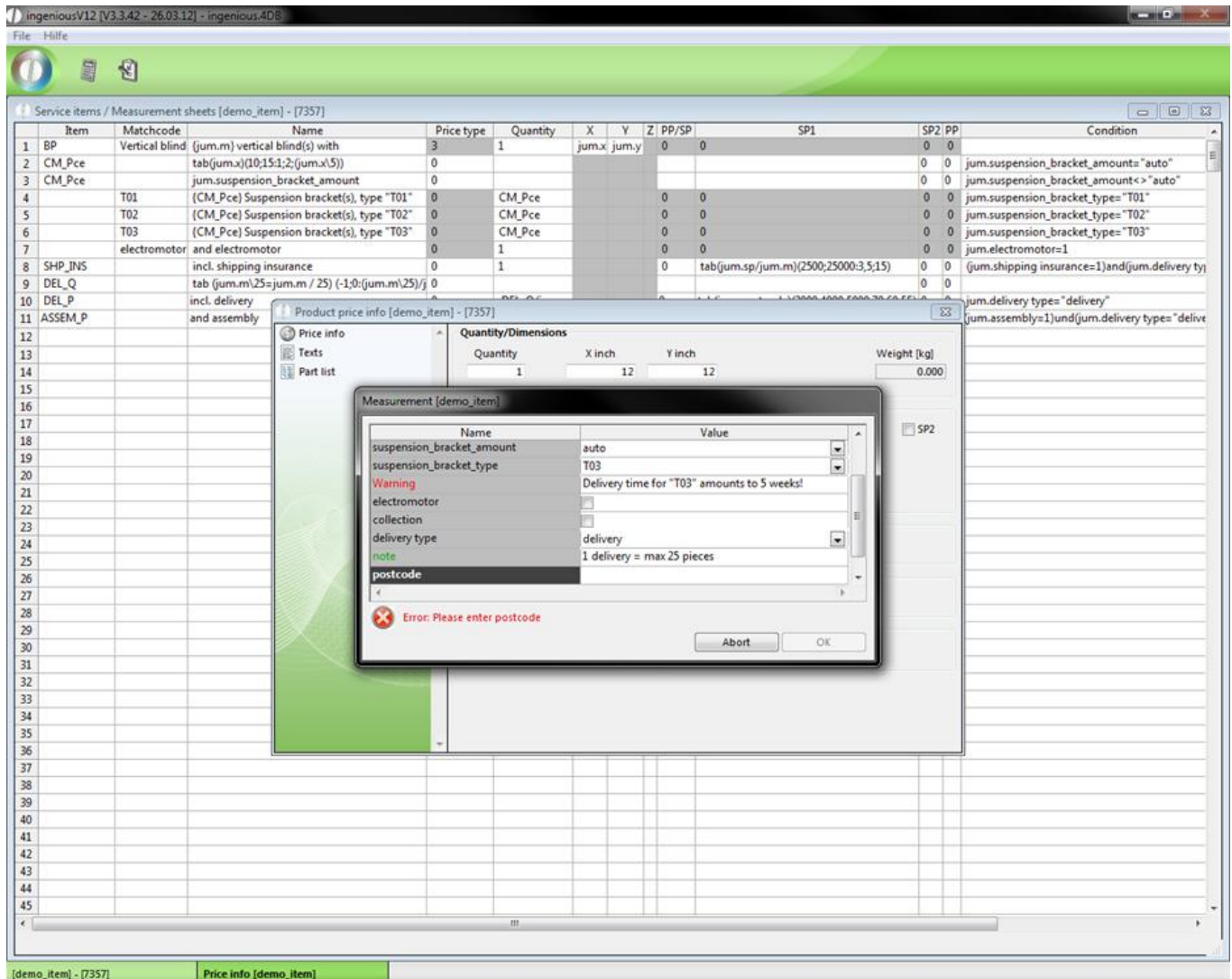
For the completion, the condition (jum.Assembly=1) and (jum.delivery type= "delivery") must be entered.

15. Fill in the blank cells of the columns, "Price type", "SP 2" and "PP" with a "0" respectively.

Your parts list looks as follows:

Item	Matchcode	Name	Price type	Quantity	X	Y	Z	PP/SP	SP1	SP2	PP	Condition
1 BP	Vertical blind	(jum.m) vertical blind(s) with	3	1	jum.x	jum.y		0 0		0 0		
2 CM_Pce		tab(jum.x)(10;15;1;2;(jum.x/5))	0							0 0		jum.suspension_bracket_amount="auto"
3 CM_Pce		jum.suspension_bracket_amount	0							0 0		jum.suspension_bracket_amount<>"auto"
4	T01	(CM_Pce) Suspension bracket(s), type "T01"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T01"
5	T02	(CM_Pce) Suspension bracket(s), type "T02"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T02"
6	T03	(CM_Pce) Suspension bracket(s), type "T03"	0	CM_Pce				0 0		0 0		jum.suspension_bracket_type="T03"
7		electromotor	0	1				0 0		0 0		jum.electromotor=1
8 SHP_INS		incl. shipping insurance	0	1				0	tab(jum.sp/jum.m)(2500;25000;3;5;15)	0 0		(jum.shipping_insurance=1)and(jum.delivery ty
9 DEL_Q		tab(jum.m\25=jum.m / 25) (-1;0;(jum.m\25)/j	0							0 0		
10 DEL_P		incl. delivery	0	DEL_Q/jum.m				0	tab(jum.postcode)(3000;4000;5000;70;60;55)	0 0		jum.delivery type="delivery"
11 ASSEM_P		and assembly	0	1					tab(jum.m)(6;16;1000;40;35;30)	0 0		(jum.assembly=1)und(jum.delivery type="delive
12			0									
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Once you have precisely had a feeling for the parts list of the figure, it is then finished and completely functional. Try this out immediately by clicking on the  button in order to reach the "Product Price info" window. Here you can open your checklist with the help of the  button. Test multiple different settings and pay attention to the (price) changes.



Dynamic input items

When you create a check list you can also use objects that can be controlled by scripts {Exec_Script(Script name)} or by jumbo command {tab(...)}. For a better understanding two practices will follow.

Practice about the jumbo command {tab(...)}

1. Create a test item and open the check list configuration. Add the field "??test" with a checkbox "yes/no" and the field "?dynamic object" with "combobox={tab(jum.Test)(0;1;"1;2;3";"4;5;6")}".

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.4DB

File Edit Windows Hilfe

Modifying key product data [demo_article_dyn]...

Type data

	Name	Value
1		
2		
3		
4		
5		
6		
7		

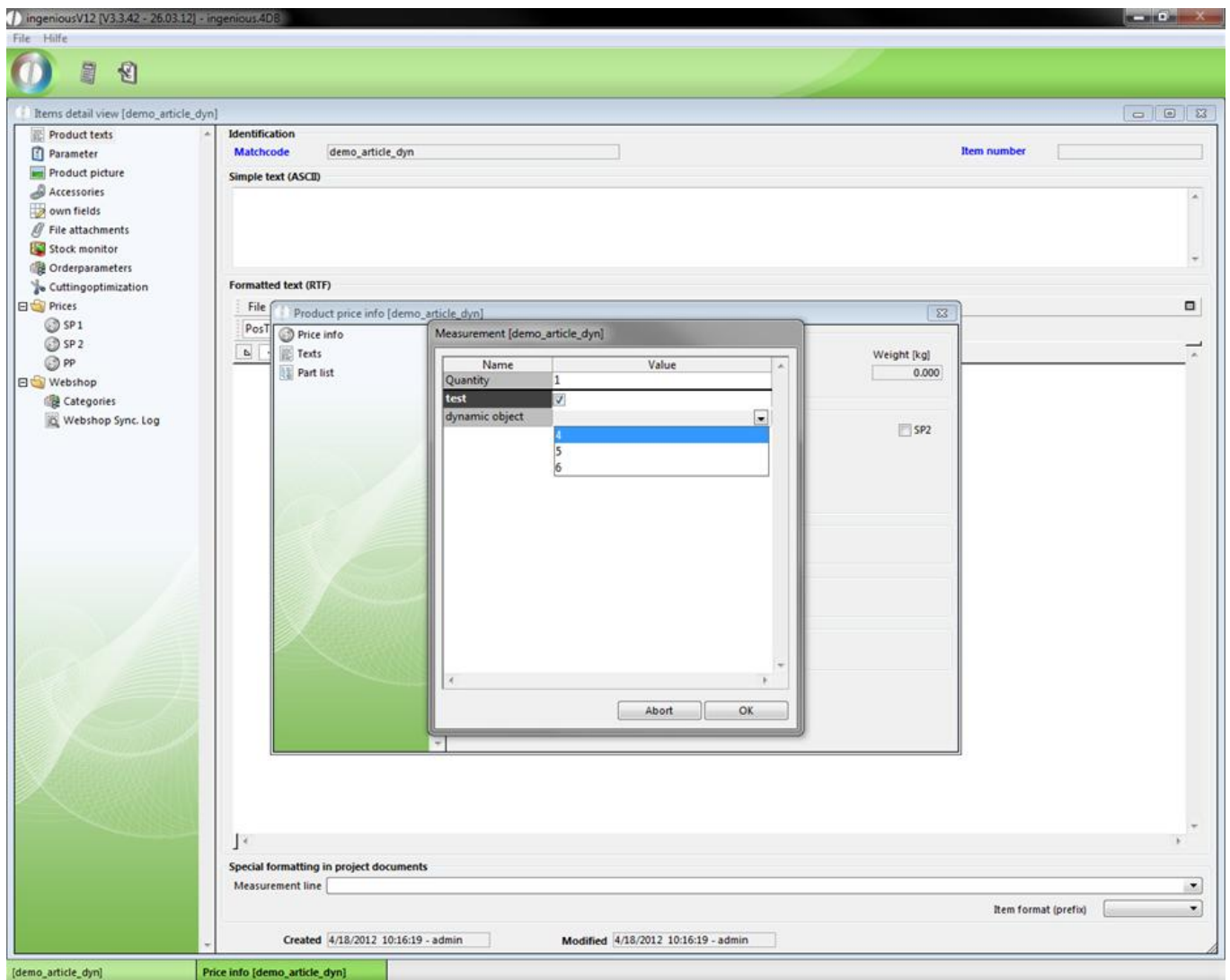
Product main data / Check list

	Name	Value
1	??test	yes/no
2	?dynamic object	comboboxes={tab(jum.Test)(0;1;"1;2;3";"4;5;6")}
3		
4		
5		
6		
7		
8		
9		
10		
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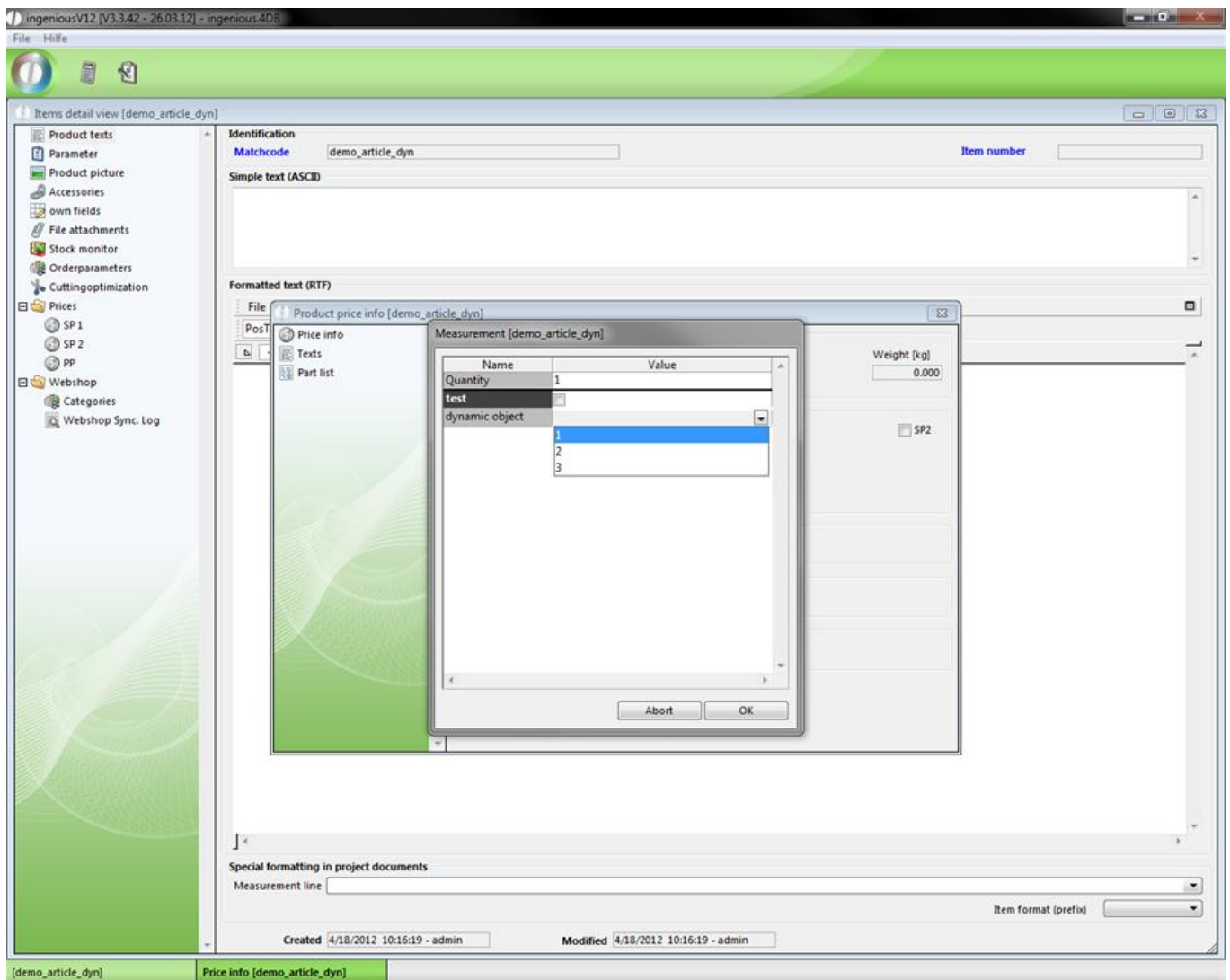
[demo_article_dyn]

The "tab" command checks, whether the checkbox Test is checked or not. If it is checked, the list "dynamic object" contains the values 4, 5 and 6; otherwise 1, 2 and 3.

2. Save the changes and click  and  to view the created check list.

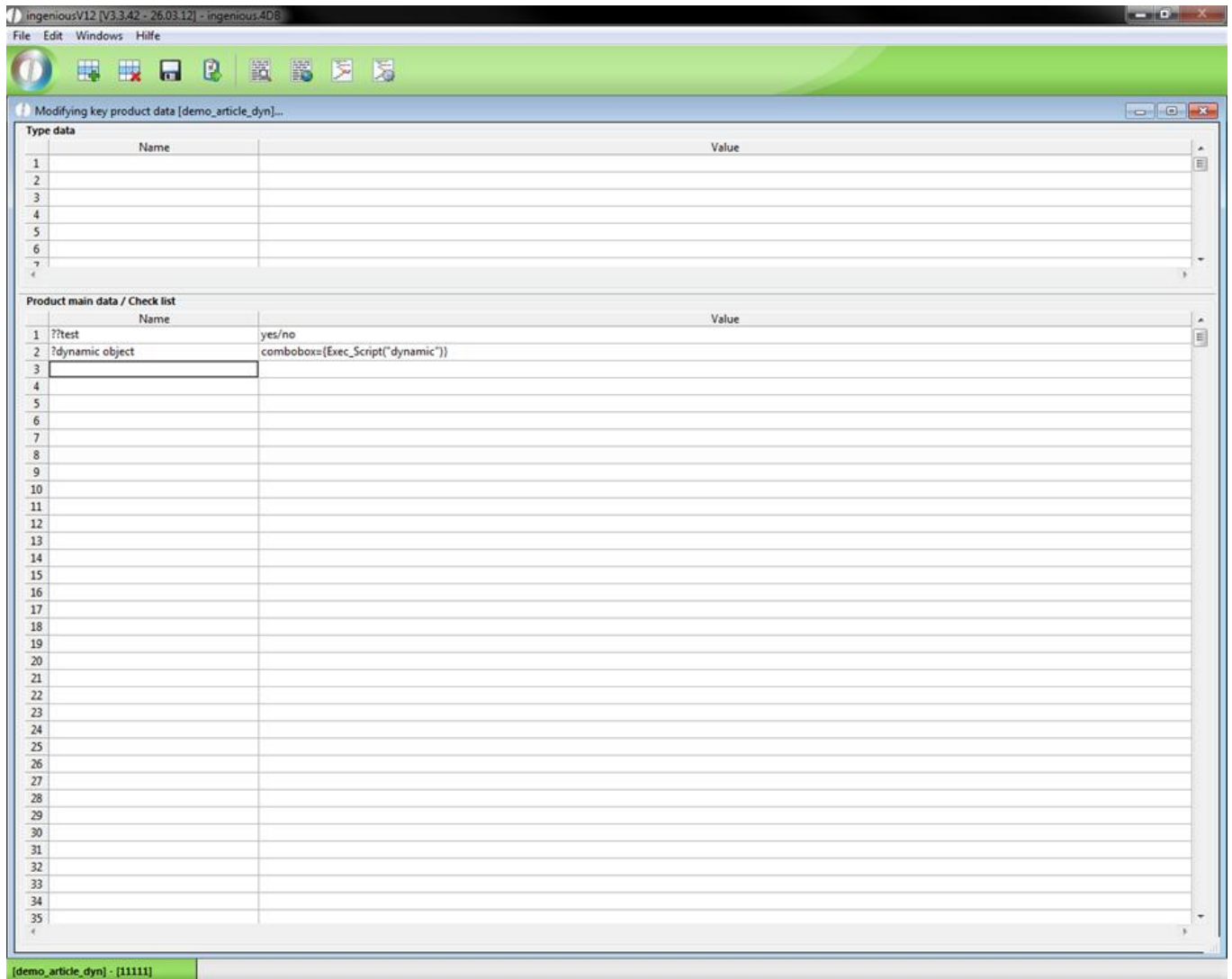


3. Now uncheck "test" and look at the changes.

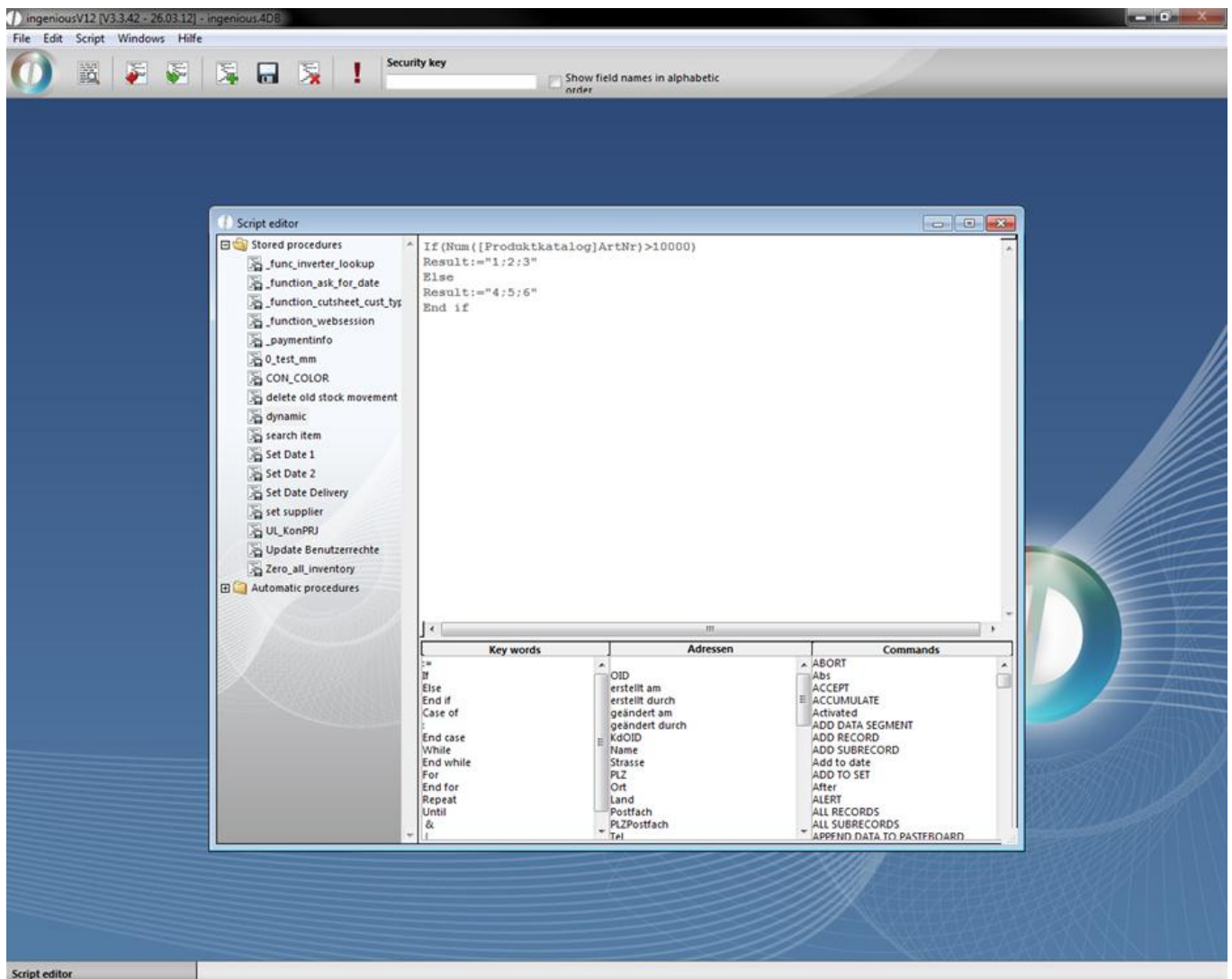


Practice about {Exec_Script("Scriptname")}

1. Open the test item again, change the combobox to "combobox={Exec_Script("dynamic")}" and save the changes.

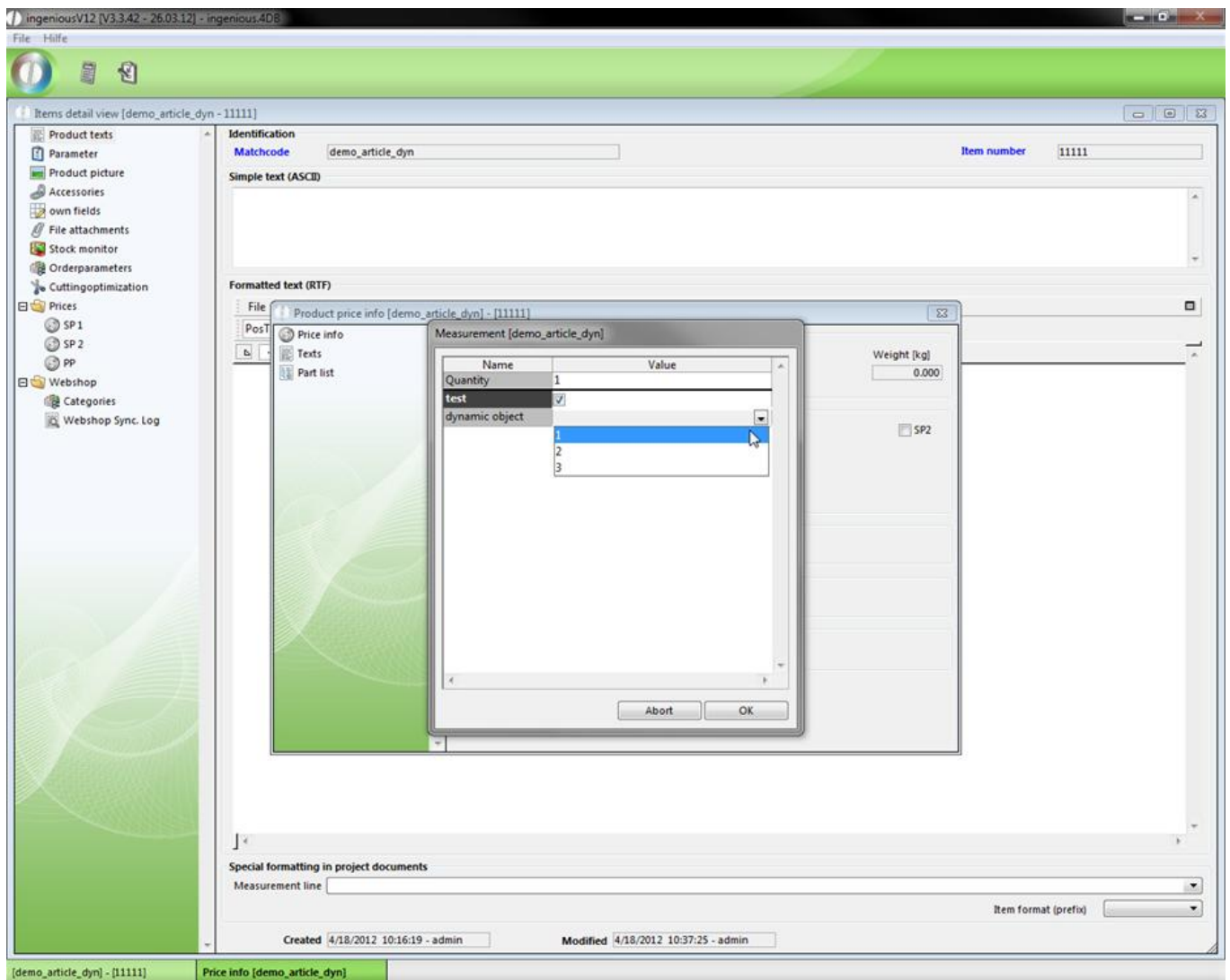


2. Now open the free data manipulation and create the new script "dynamic" with the following content.

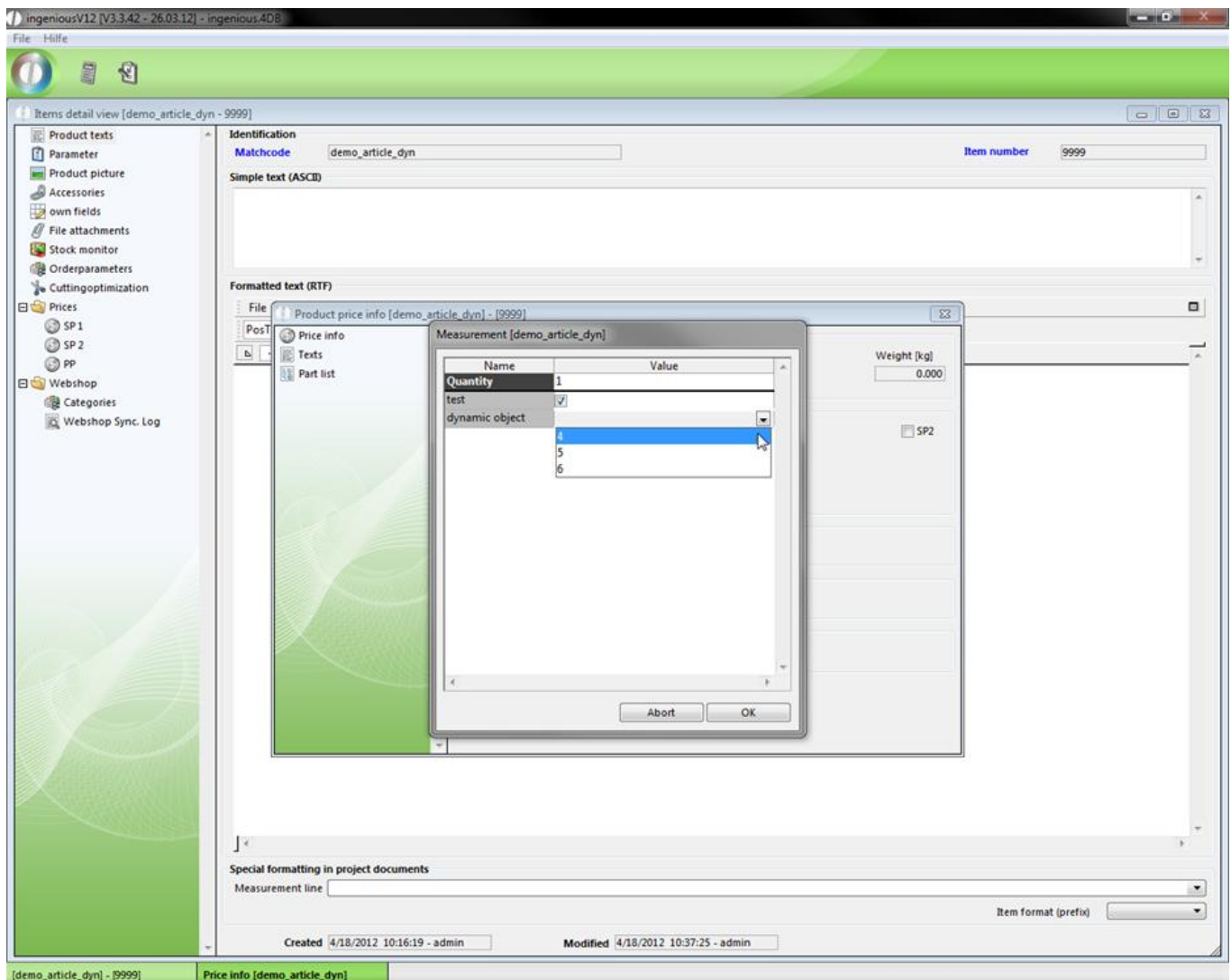


The script checks the item number. If it is bigger than 10000 the numbers 1, 2 and 3; otherwise 4, 5 and 6 will be given out.

3. Go back to the test item and change the item number to "11111". Now open the check list.



4. Now change the item number to "9999" and check the check list again.



Visible- and Set-commands for the multi item input

The Visible- and Set-commands and dynamic field are supported in the multi items. That means, you can also customize every item in the multi item input individually.

The screenshot shows the 'Modifying key product data [demo_article_multi_item]...' window in the ingenious.V12 software. The window has a menu bar (File, Edit, Windows, Hilfe) and a toolbar. Below the toolbar, there are two main sections:

Type data

	Name	Value
1		
2		
3		
4		
5		
6		
7		

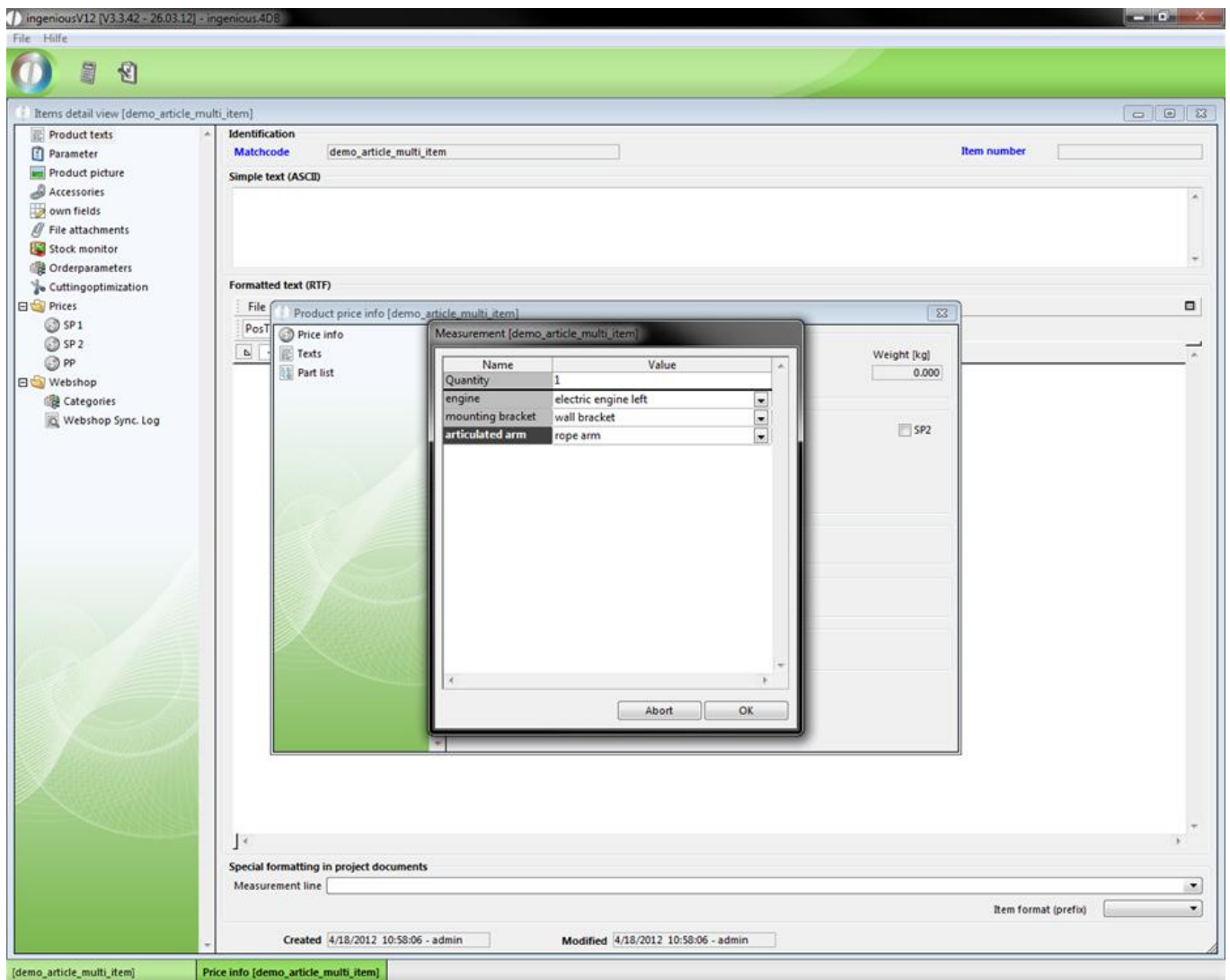
Product main data / Check list

	Name	Value
1	??engine	dropdowns= electric engine left; electric engine right
2	??mounting bracket	dropdowns= wall bracket; ceiling bracket; alcove bracket
3	??articulated arm	dropdowns= rope arm; chain arm
4	=visible engine	(jum.articulated arm= "rope arm")
5	=set mounting bracket= "ceiling bracket"	(jum.articulated arm= "chain arm")
6		
7		
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14		
15		
16		
17		
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35		

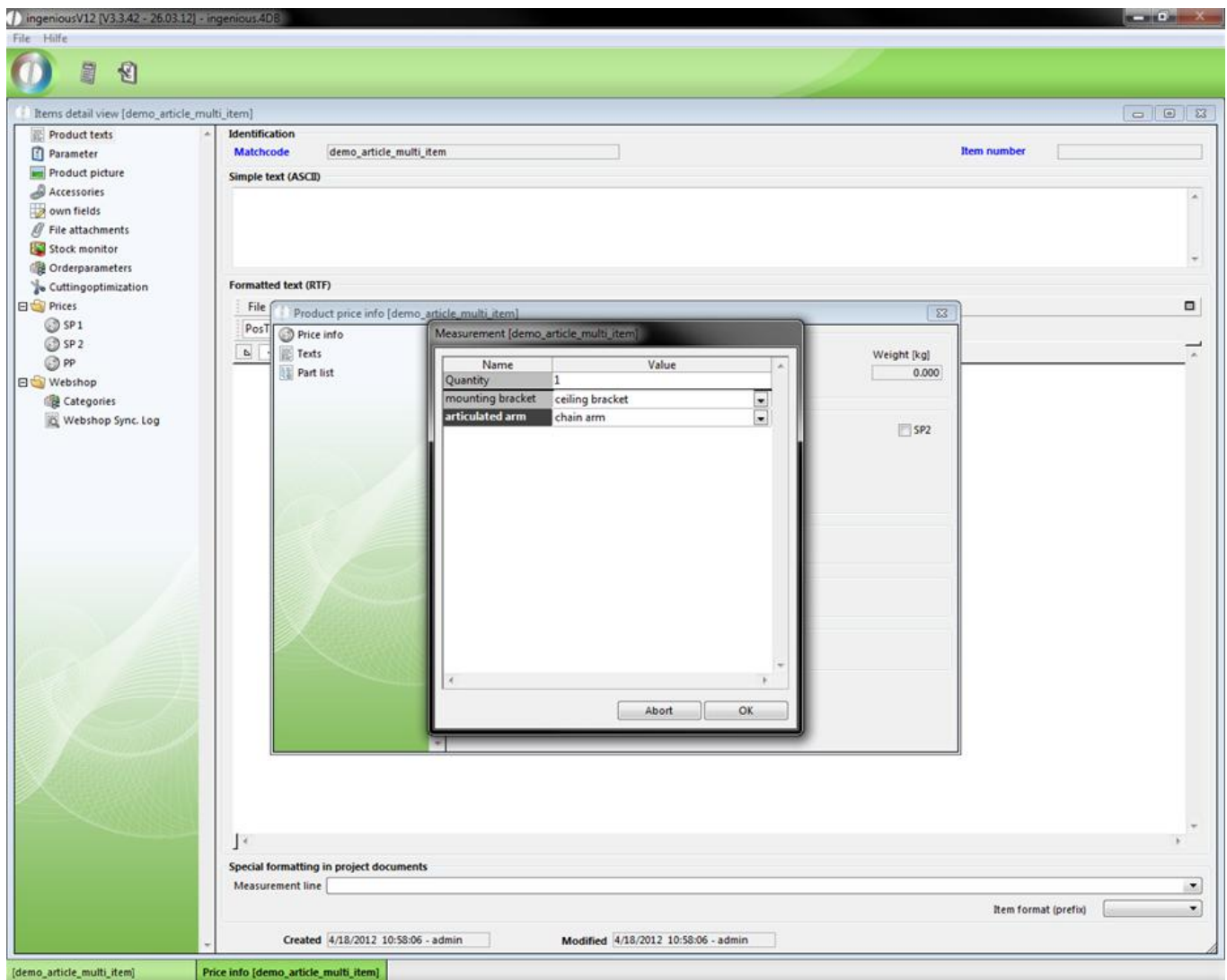
The status bar at the bottom shows '[demo_article_multi_item]'.

Example of a check list

When rope arm is selected the field "engine" is displayed. Otherwise it is invisible. If chain arm is selected, the value for the field mounting bracket is automatically set to ceiling bracket.

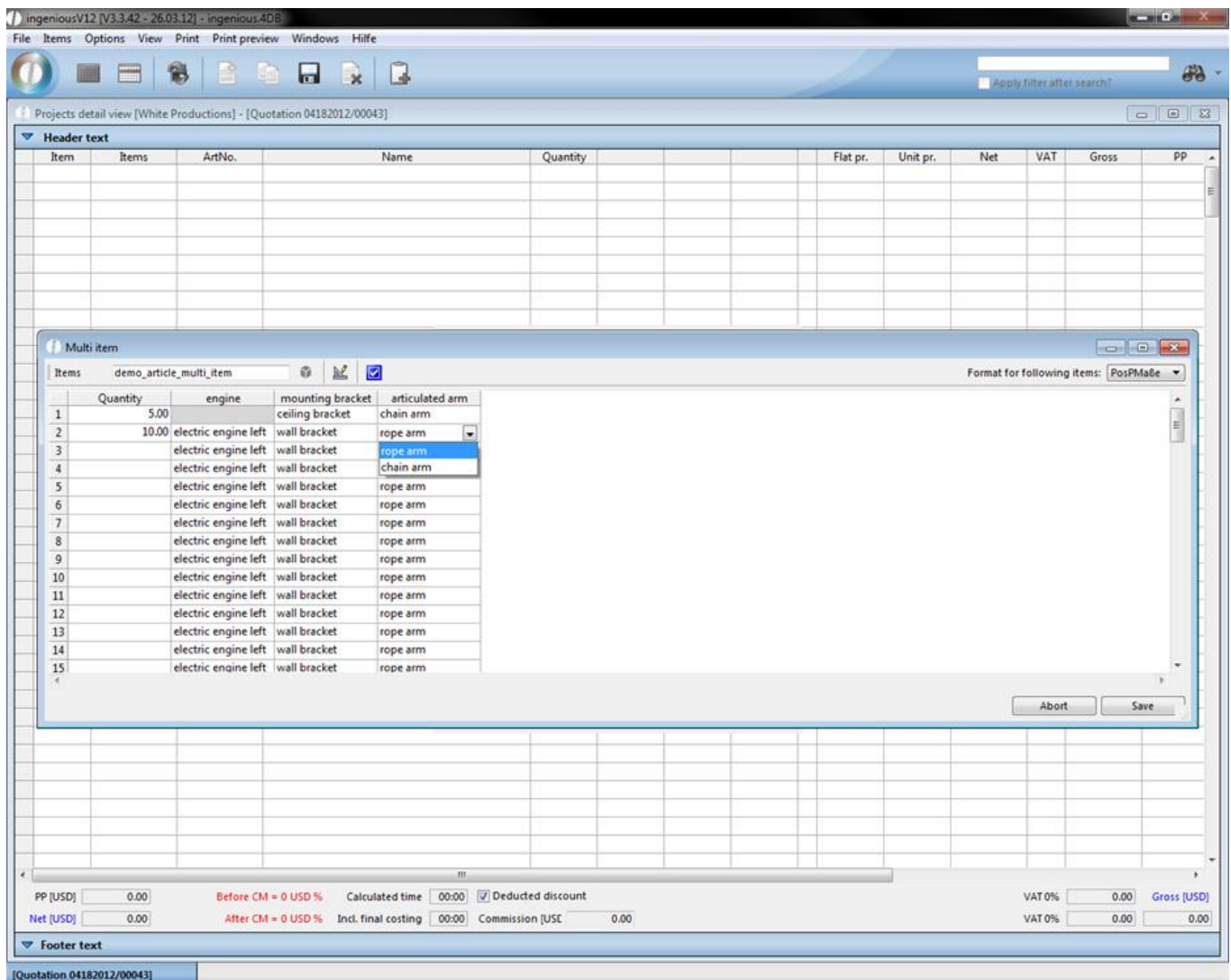


Check list, when rope arm is selected



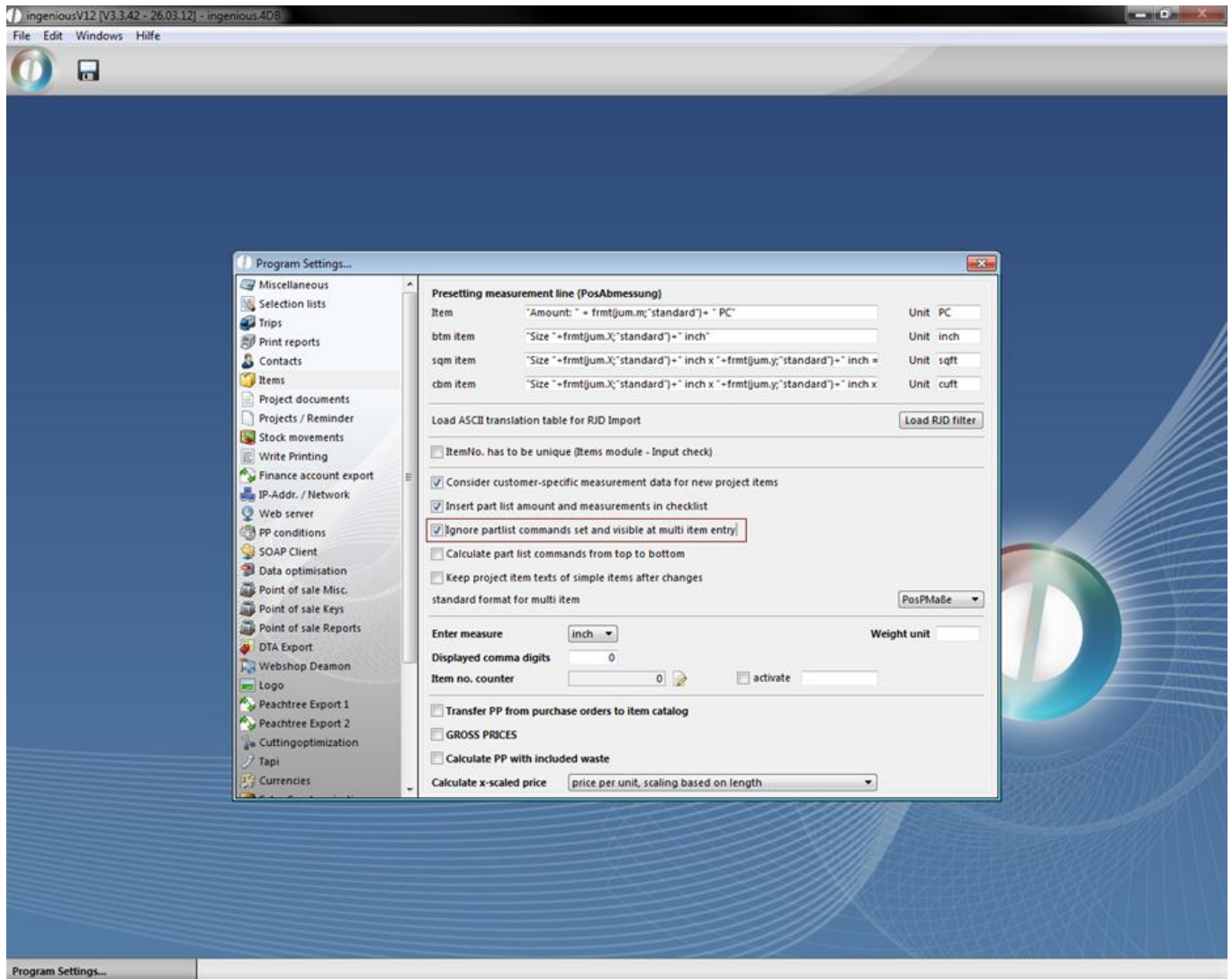
Check list, when chain arm is selected

When you add a multi item in a project the commands will be taken over and executed. Invisible fields are colored in grey.




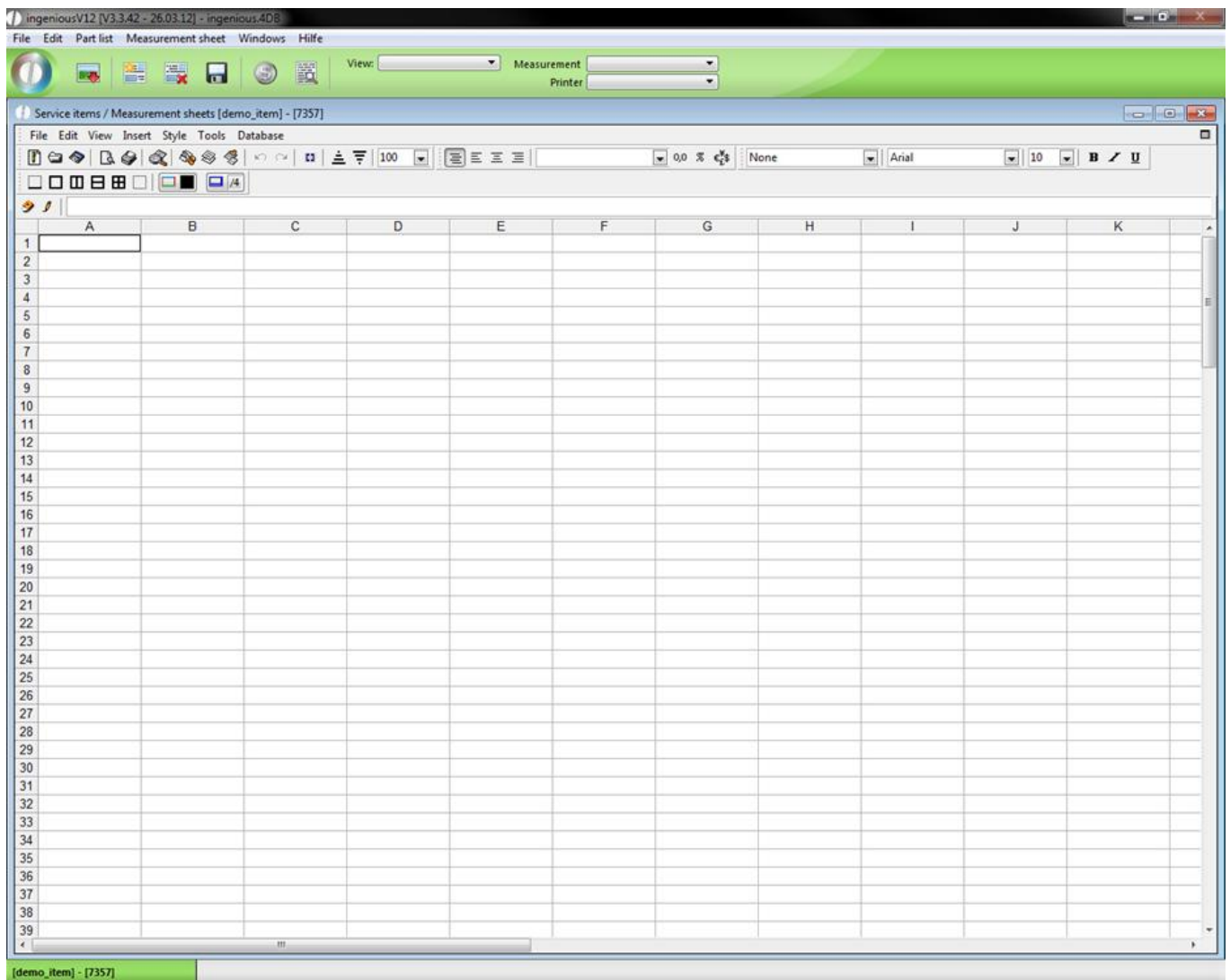
View of the multi item

Note: In the program settings in the category „Items“ you have the opportunity to deactivate the individual customizations for the multi items by checking “Ignore partlist commands set and visible at multi item entry”.



3.2.3.3 Creating spreadsheets

With a spreadsheet, it is possible to display the ordered items with all data in tabular or graphic format. In the organization of the spreadsheet, plenty of flexibility is given to you. In order to create a spreadsheet, click in the parts list on the  button. The parts list disappears and a blank table appears.



In this table, you create your spreadsheet. There the same functions, operators and placeholders are available to you as they are in the parts list programming. The menu "Style/Cell (s) ..." offers numerous possibilities for you to create your spreadsheet by means of frames, font colors and background colors, etc. Here you find setting variations on writing, color, adjustment, format and properties of the respective cells. The insertion of pictures or graphic arts is possible by means of a cache. Simply highlight the desired graphic arts and use the command "Edit / Copy" or the key combination Ctrl + C to copy into the cache. Now the graphic arts must be copied only with the "Edit / Insert" command or Ctrl V from the cache in the spreadsheet.

In the following exercise, you will create a spreadsheet for the current record (demo_item).

Practice creating a spreadsheet

1. Go the spreadsheet view and create the spreadsheet according to the following table.

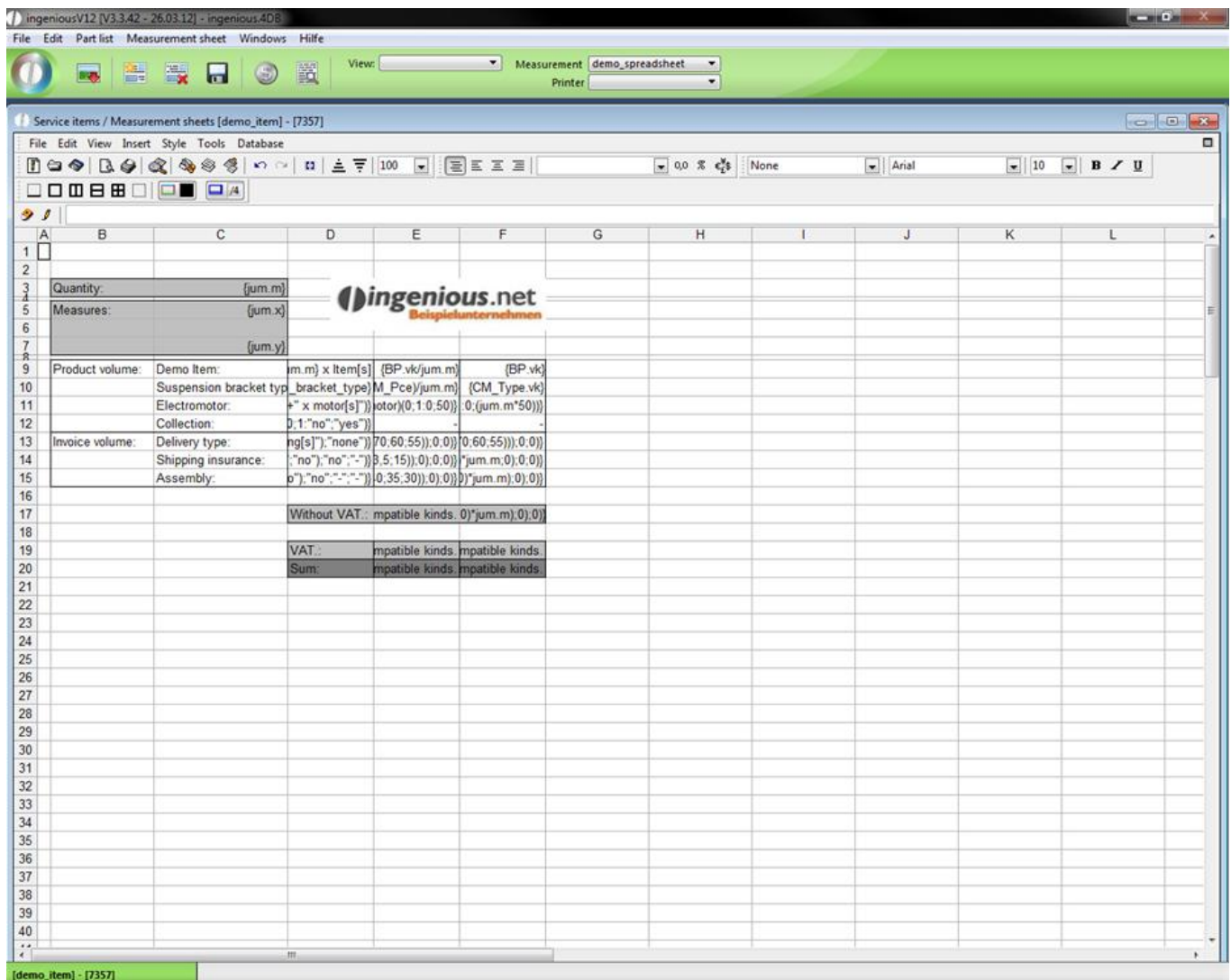
Cell:	Content:
B3	Quantity:
B5	Measures:
B9	Product volume:
B13	Invoice volume:

C3	{jum.m}
C5	{jum.x}
C7	{jum.y}
C9	Demo Item:
C10	Suspension bracket type:
C11	Electromotor:
C12	Collection:
C13	Delivery type:
C14	Shipping insurance:
C15	Assembly:
D9	{jum.m} x Item[s]
D10	{CM_Pce *jum.m} x {jum.suspension_bracket_type}
D11	{tab(jum.electromotor)(0;1:"no";jum.m+" x motor[s]")}
D12	{tab(jum.collection)(0;1:"no";"yes")}
D13	{tab(jum.collection)(0;1:tab(jum.delivery type)("delivery";"shipping":DEL_Q+" x Delivery/ies";jum.m+" x Shipping[s]";"none"))}
D14	{tab(jum.delivery type)("shipping";"delivery";"Please choose":tab(jum.shipping insurance)(1;0;jum.m+" x insurance[s]";"no";"no";"-"))}
D15	{tab(jum.delivery type)("delivery";"shipping";"Please choose":tab(jum.assembly)(1;0;jum.m+" x assembly/ies";"no";"no";"-"))}
D17	Without VAT.:
D19	VAT.:
D20	Sum:
E9	{BP.vk/jum.m}
E10	{{CM_Type.vk/CM_Pce}/jum.m}
E11	{tab(jum.electromotor)(0;1;0;50)}
E12	-
E13	{tab(jum.delivery type)("delivery";"shipping";"Please choose":tab(len(jum.postcode))}

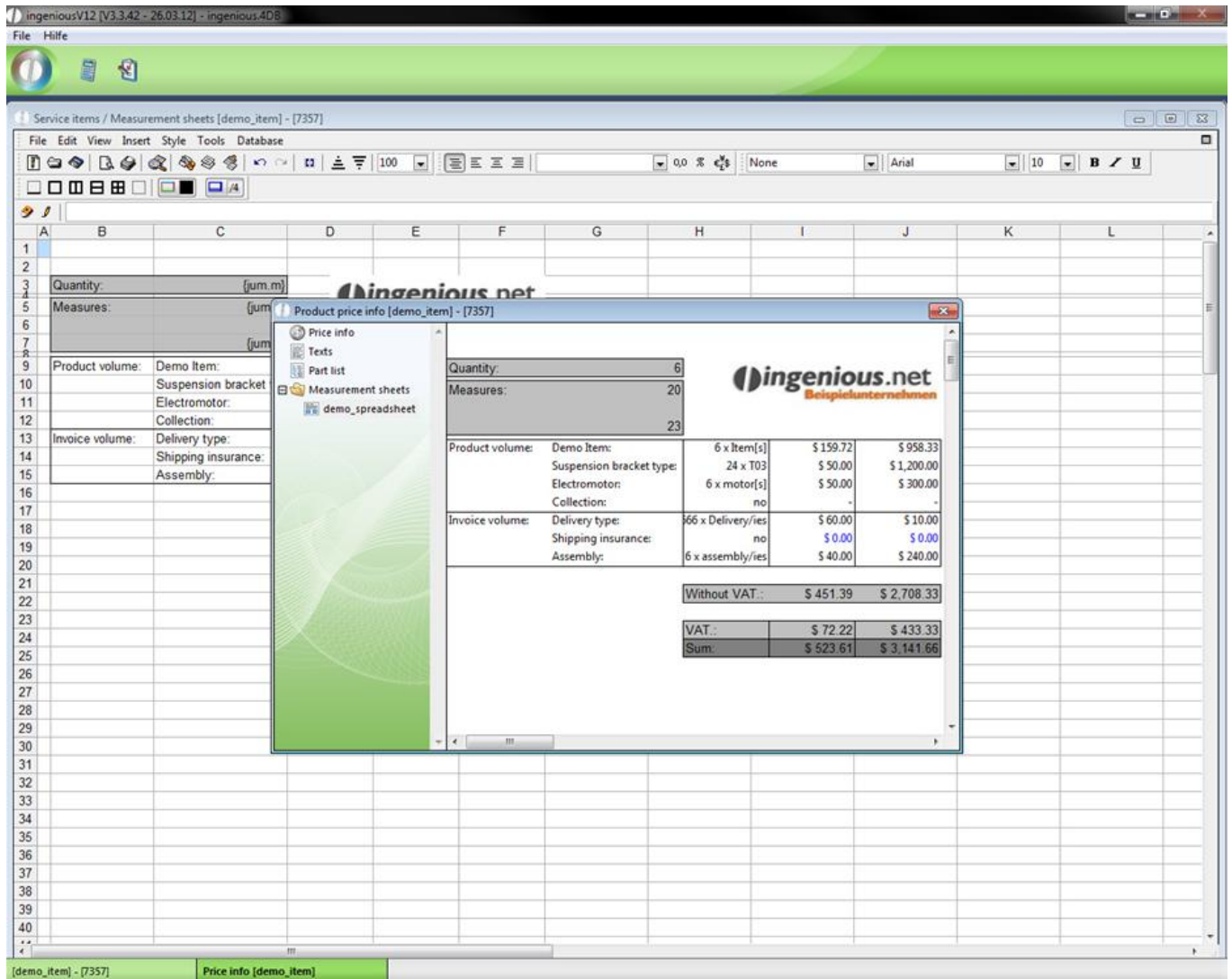
	{(0;6;0;tab(num(jum.postcode))(3000;4000;5000:70;60;55));0;0)}
E14	{tab(jum.delivery type)("shipping";"delivery";"Please choose":tab(jum.shipping insurance)(1;0:(tab(jum.sp/jum.m)(2500;25000:3,5;15));0;0;0))}
E15	{tab(jum.delivery type)("shipping";"delivery";"Please choose":0;tab(jum.assembly)(1;0:(tab(jum.m)(6;16;1000:40;35;30));0;0))}
E17	= (F9+F10+F11+F13+F14+F15)/C3
E19	= E17*0.16
E20	= E17+E19
F9	{BP.vk}
F10	{CM_Type.vk}
F11	{tab(jum.electromotor)(0;1;0;(jum.m*50))}
F12	-
F13	{tab(jum.delivery type)("delivery";"shipping";"Please choose":tab(len(jum.postcode))(0;6;0;(DEL_Q)* (tab(num(jum.postcode))(3000;4000;5000:70;60;55));0;0))}
F14	{tab(jum.delivery type)("shipping";"delivery";"Please choose":tab(jum.shipping insurance)(1;0:(tab(jum.vk/jum.m)(2500;25000:3,5;15))*jum.m;0;0;0))}
F15	{tab(jum.delivery type)("shipping";"delivery";"Please choose":0;tab(jum.assembly)(1;0:(tab(jum.m)(6;16;1000:40;35;30)*jum.m);0;0))}
F17	= F9+F10+F11+F13+F14+F15
F19	= F17*0.16
F20	= F17+F19

2. Format your spreadsheet as you choose.

Your spreadsheet can look as follows:




Now test your spreadsheet extensively to remove possible inconsistencies of the cell contents. You can also make several spreadsheets for a parts list.

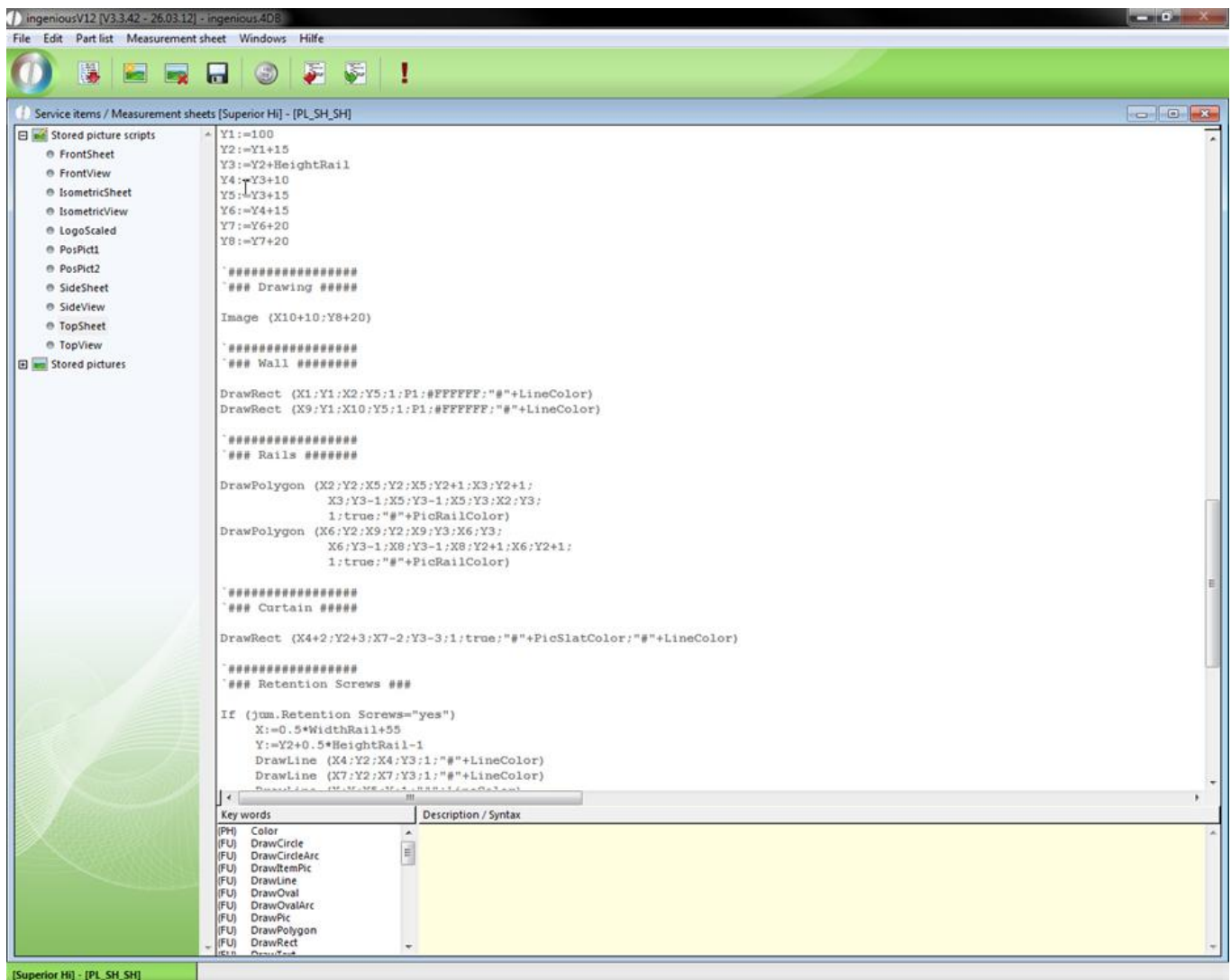


3.2.3.4 Picture scripts

The picture scripts represent a separate external module of Ingenious.V12 that you can buy at the Ingenious GmbH. To install the module just copy the plugin into your Ingenious.V12 directory.


With the help of the picture scripts you can create scaled and flexible sketches for your items.

To open the module click in the window "Service items / measurement sheets" on the button "Switch to measurement pictures" . A new window will open up where you have the opportunity to create several picture scripts and add pictures.

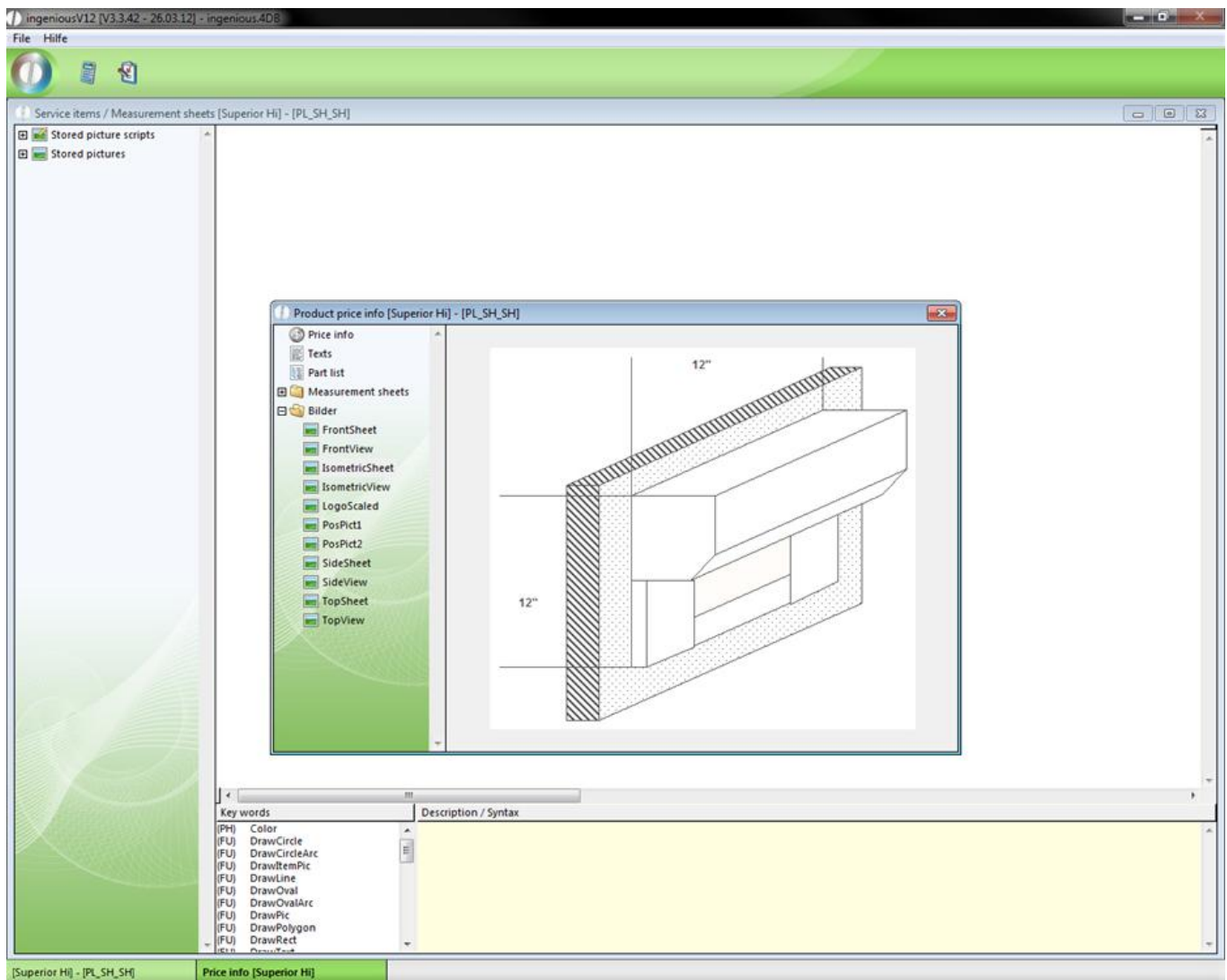



Example of a picture script

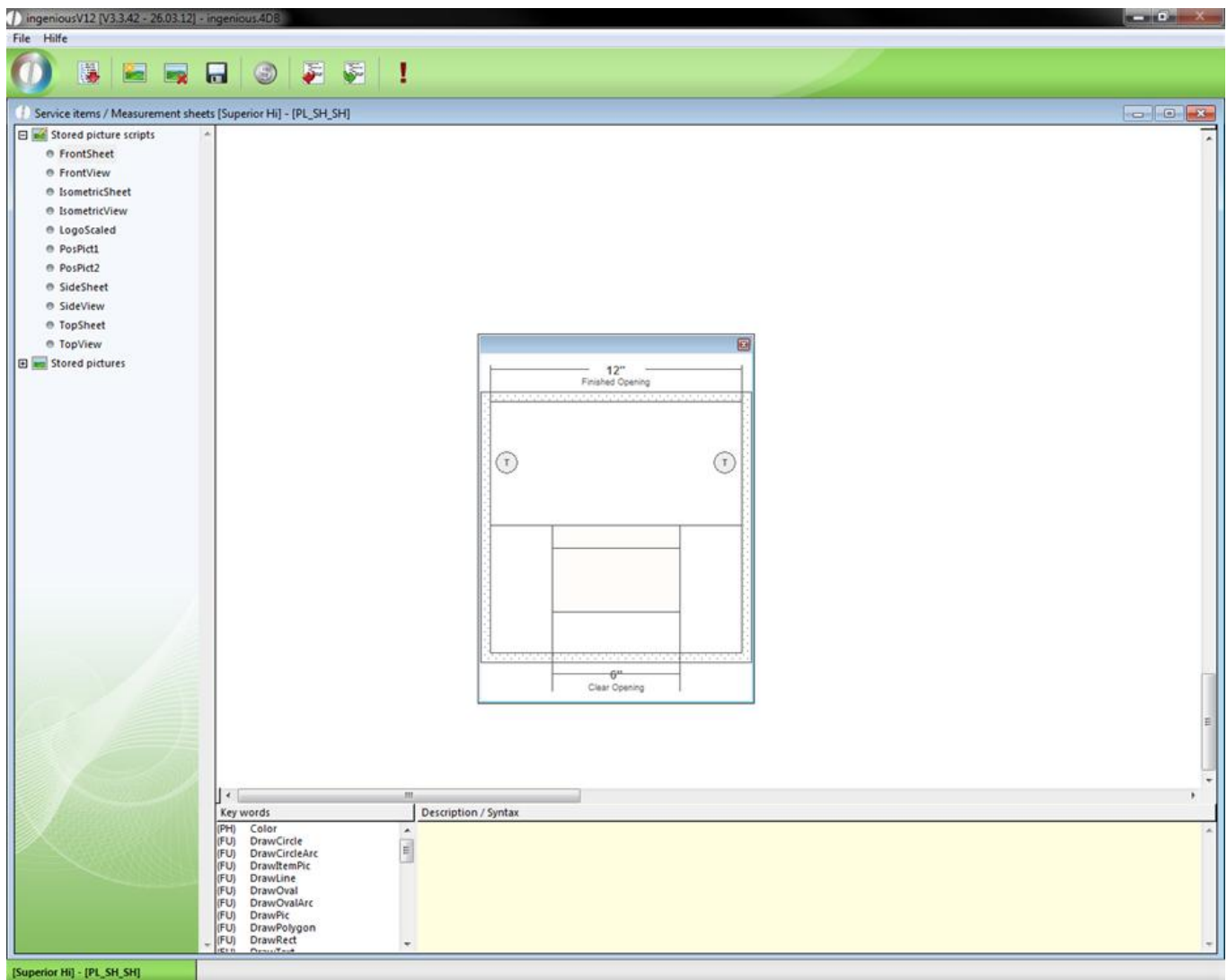
To access the current picture script you have to click the button .

Then click on  and create a valid configuration.

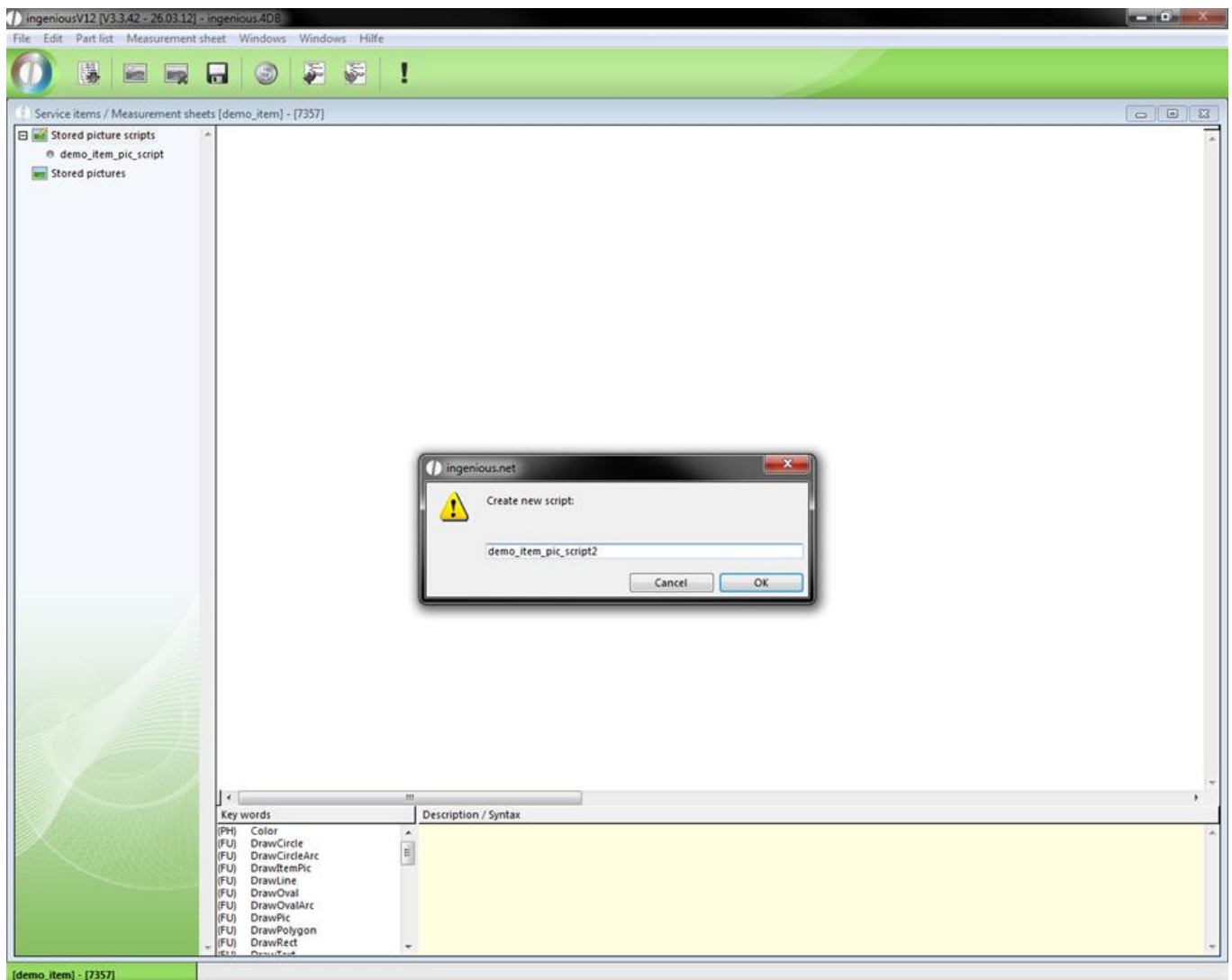
Now you can go to the directory "Pictures" and find the measurement picture created to the picture script.



The current measurement picture can also be displayed in the "measurement pictures" window with the button  "Run script!".

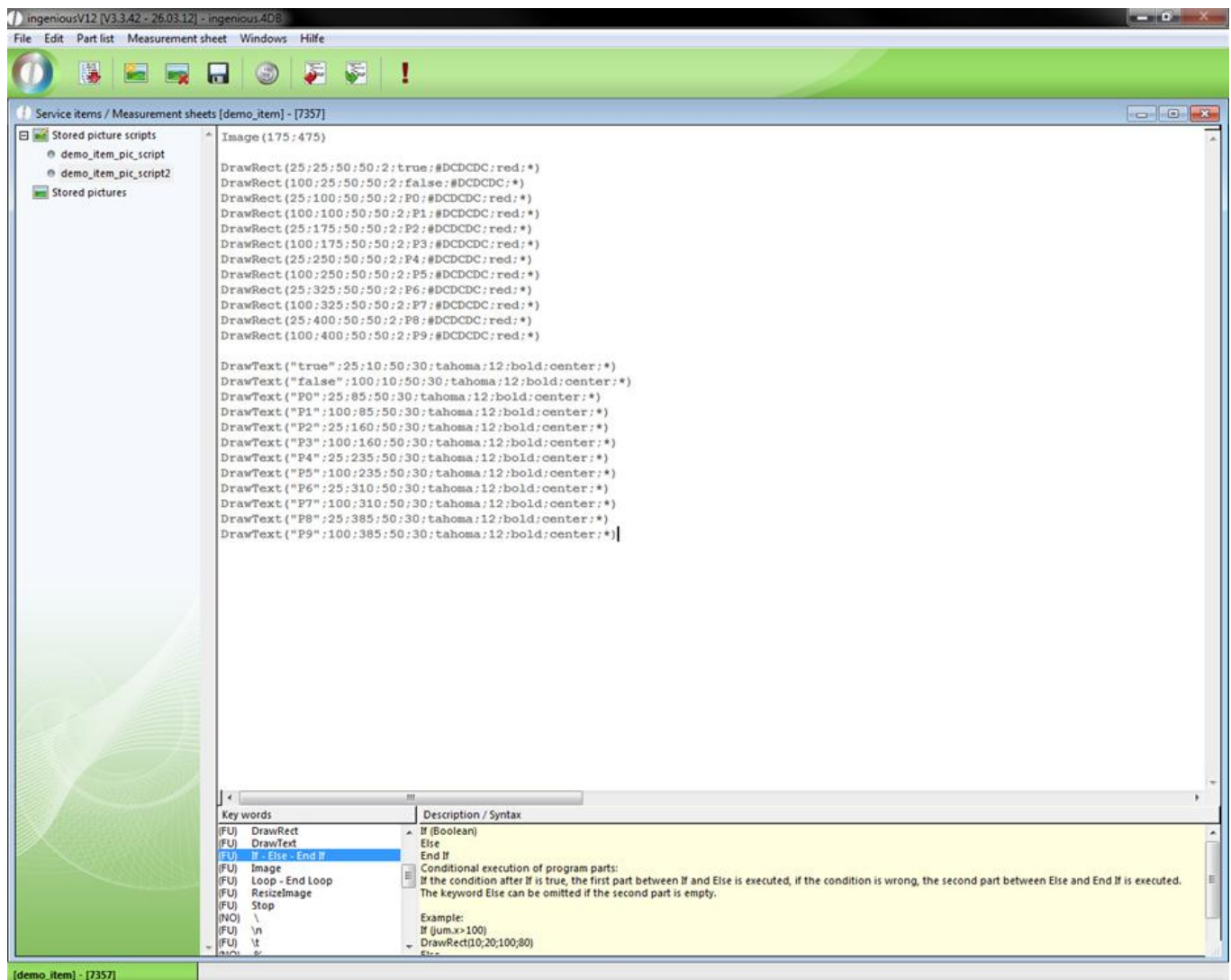


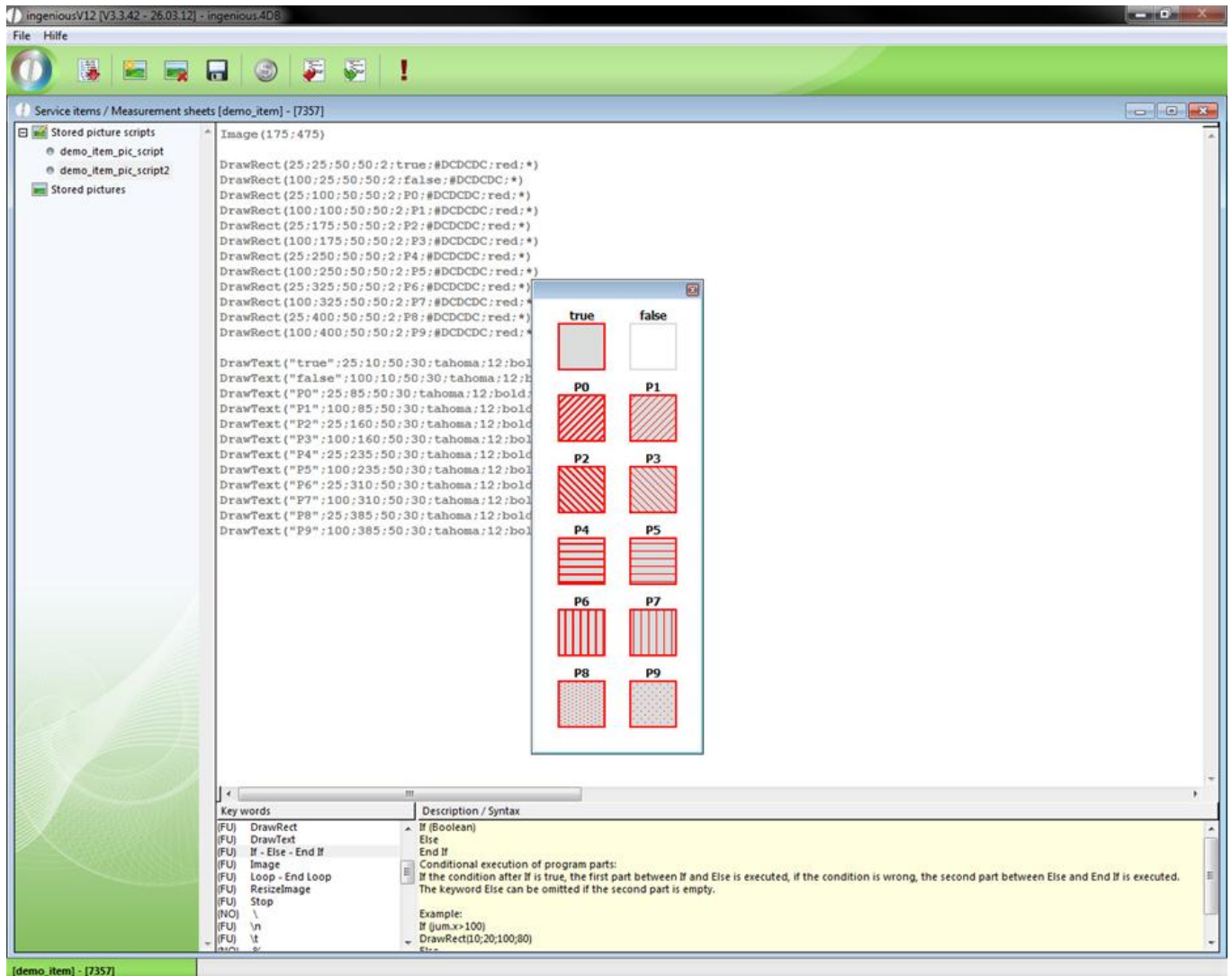
To create a new picture script click on the button . In the appearing window you can enter a script name.



The script creation happens in the script area. With a double click you can add the desired key word and alter it. Every key word is described in the right window area. On this way you can create you individual picture scripts quick and easy.

It's also possible to fill areas with a pattern and to set the background and line color. There are 10 different patterns with fixed parameter names (P0 – P9). In the following representations a few script command variations for the different patterns and the visual output is displayed.





A few important key words to create picture scripts:

Color

Syntax: #FFFFFF

The following colors can be used to colorize objects: black; darkgrey; grey; lightgrey; white; red; green; blue; yellow; cyan; magenta; orange; purple; brown.

Other colors can be insert by RGB-values in hexadecimal form: #RRGGBB.

Example: very light grey: #e0e0e0

DrawCircle

Syntax: DrawCircle (X1;Y1;Radius{;Width{;Filled{;Color1{;Color2}}})

Create a circle:

The center of the circle is at X1 / Y1, the distance between circle and center is specified by Radius.

The parameter "Width" specifies the width of circle line (optional, default: 1).

The parameter "Filled" specifies whether the interior of the circle is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the circle (optional, default: black).

The parameter "Color2" specifies the line color of a filled circle (optional, default: black).

Example: DrawCircle (100;100;75;1;False;blue)

DrawCircleArc

Syntax: DrawCircleArc (X1;Y1;Radius;StartAngle;ArcAngle{;Width{;Filled{;Color1{;Color2}}})

Create a segment of a circle:

The center of the circle is at X1 / Y1, the distance between segment and center is specified by Radius.

The parameter "StartAngle" specifies where the starting point of the segment is, 0° is vertical over the center, 90° is right of the center, etc..

The parameter "ArcAngle" specifies the size of the segment.

The parameter "Width" specifies the width of circle line (optional, default: 1).

The parameter "Filled" specifies whether the interior of the segment is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the segment (optional, default: black).

The parameter "Color2" specifies the line color of a filled segment (optional, default: black).

Example: DrawCircleArc (100;100;75;-45;90;1;False;blue)

DrawItemPic

Syntax: DrawItemPic (Matchcode;X1;Y1{;X2;Y2{*}})

Create a item picture:

The upper left corner of the picture is at X1 / Y1.

The picture can be scaled with the parameters X2 / Y2. If these parameters are omitted the picture is printed in original size.

If the * is omitted, the lower right corner of the picture is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2 (optional).

Example: DrawItemPic (Item X;10;60;100;100;*)

DrawLine

Syntax: DrawLine (X1;Y1;X2;Y2{;Width{;Color}}{*})

Create a line:

The starting point of the line is at X1 / Y1.

The end point of the line is at X2 / Y2 if * is omitted, otherwise it's at X1+X2 / Y1+Y2.

The parameter "Width" specifies the width of the line (optional, default: 1).

The parameter "Color" specifies the color of the line (optional, default: black).

Example: DrawLine (10;10;50;50;1;red;*)

DrawOval

Syntax: DrawOval (X1;Y1;X2;Y2{;Width{;Filled{;Color1{;Color2}}}}{*})

Create a ellipse:

One corner point of the ellipse is at X1 / Y1.

If the * is omitted, the second corner point of the ellipse is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2.

The parameter "Width" specifies the width of line (optional, default: 1).

The parameter "Filled" specifies whether the interior of the ellipse is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the ellipse (optional, default: black).

The parameter "Color2" specifies the line color of a filled ellipse (optional, default: black).

Example: DrawOval (100;100;175;130;1;False;blue)

DrawOvalArc

Syntax: DrawOvalArc (X1;Y1;X2;Y2;StartAngle;ArcAngle{;Width{;Filled{;Color1{;Color2}}}}{*})

Create a ellipse segment:

One corner point of the ellipse is at X1 / Y1.

If the * is omitted, the second corner point of the ellipse is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2.

The parameter "StartAngle" specifies where the starting point of the segment is, 0° is vertical over the center, 90° is right of the center, etc..

The parameter "ArcAngle" specifies the size of the segment.

The parameter "Width" specifies the width of line (optional, default: 1).

The parameter "Filled" specifies whether the interior of the ellipse segment is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the ellipse segment (optional, default: black).

The parameter "Color2" specifies the line color of a filled ellipse segment (optional, default: black).

Example: DrawOvalArc (100;100;175;130;-45;90;1;False;blue)

DrawPic

Syntax: DrawPic (Name;X1;Y1{;X2;Y2{*}})

Create a picture:

The upper left corner of the picture is at X1 / Y1.

The picture can be scaled with the parameters X2 / Y2. If these parameters are omitted the picture is printed in original size.

If the * is omitted, the lower right corner of the picture is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2 (optional).

Example: DrawPic (Pic1;10;60)

DrawPolygon

Syntax: DrawPolygon (X1;Y1;X2;Y2{;X3;Y3;...}{;Width{;Filled{;Color1{;Color2}}}})

Create a polygon:

The start point of the polygon is at X1 / Y1.

The parameter "X2; Y2; X3; Y3; ..." specify the corner points of the polygon.

The parameter "Width" specifies the width of the border lines (optional, default: 1).

The parameter "Filled" specifies whether the interior of the polygon is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the polygon (optional, default: black).

The parameter "Color2" specifies the line color of a filled polygon (optional, default: black).

Example: DrawPolygon(80;140;120;140;160;170;1;True;green;gray)

DrawRect

Syntax: DrawRect (X1;Y1;X2;Y2{;Width{;Filled|Pattern{;Color1{;Color2}}}}{*})

Create a rectangle:

One corner point of the rectangle is at X1 / Y1.

If the * is omitted, the second corner point of the rectangle is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2.

The parameter "Width" specifies the width of the border lines (optional, default: 1).

The parameter "Filled" specifies whether the interior of the rectangle is transparent or filled with a pattern (optional, default: False).

The parameter "Color1" specifies the color of the rectangle (optional, default: black).

The parameter "Color2" specifies the line color of a filled rectangle (optional, default: black).

Example: DrawRect (10;10;50;50;1;P3;red;blue;*)

DrawText

Syntax: DrawText (Text;X1;Y1{;X2;Y2}{;Font{;Size{;Style{;Alignment{;Color}}}}}{;{*})

Create a text:

The upper left corner of the picture is at X1 / Y1.

The size of the textfield can be limited with the parameters X2 / Y2, thus it's possible to force line breaks. If the * is omitted, the lower right corner of the text is at X2 / Y2, otherwise it's at X1+X2 / Y1+Y2. (optional)

The parameter "Font" specifies the font of the text. All windows fonts can be used (optional, default: Arial).

The parameter "Size" specifies the text size (optional, default: 10).

The parameter "Style" specifies the style of the text (bold / italic / underline) (optional, default: none).

The parameter "Alignment" specifies the alignment of the text (left, right, center) (optional, default: left).

The parameter "Color" specifies the color of the text (optional, default: black).

The parameter "Language" specifies in which language the text is translated. (EN, DE, ..., User) (optional, default: no translation).

Example: DrawText(Hello World;300;400;Arial;12;bold+italic;center;red)

If-Else-End If

Syntax:

If (Boolean)

Else

End If

Conditional execution of program parts:

If the condition after If is true, the first part between If and Else is executed, if the condition is wrong, the second part between Else and End If is executed.

The keyword Else can be omitted if the second part is empty.

Example:

```
If (jum.x > 100)
```

```
DrawRect(10;20;100;80)
```

```
Else
```

```
DrawRect(10;20;60;80)
```

```
End If
```

Image

Syntax: Image (X; Y)

Create a new picture area with dimensions X / Y.

This call must be done before all Draw commands.

Example: Image(300;400)

Loop-End Loop

Syntax:

Loop (Repetitions)

End Loop

Repeated execution of program parts:

The part between Loop and End Loop is repeated Repetitions times. If Repetitions is null all lines till the next End Loop will be ignored.

Example:

```
y:=20
```

```
Loop (10)
```

```
DrawRect (20;y;100;16;1;false;black;*)
```

```
y:=y+20
```

```
End Loop
```

ResizeImage

Syntax: ResizeImage(Factor)



The command ResizeImage scales the whole picture.

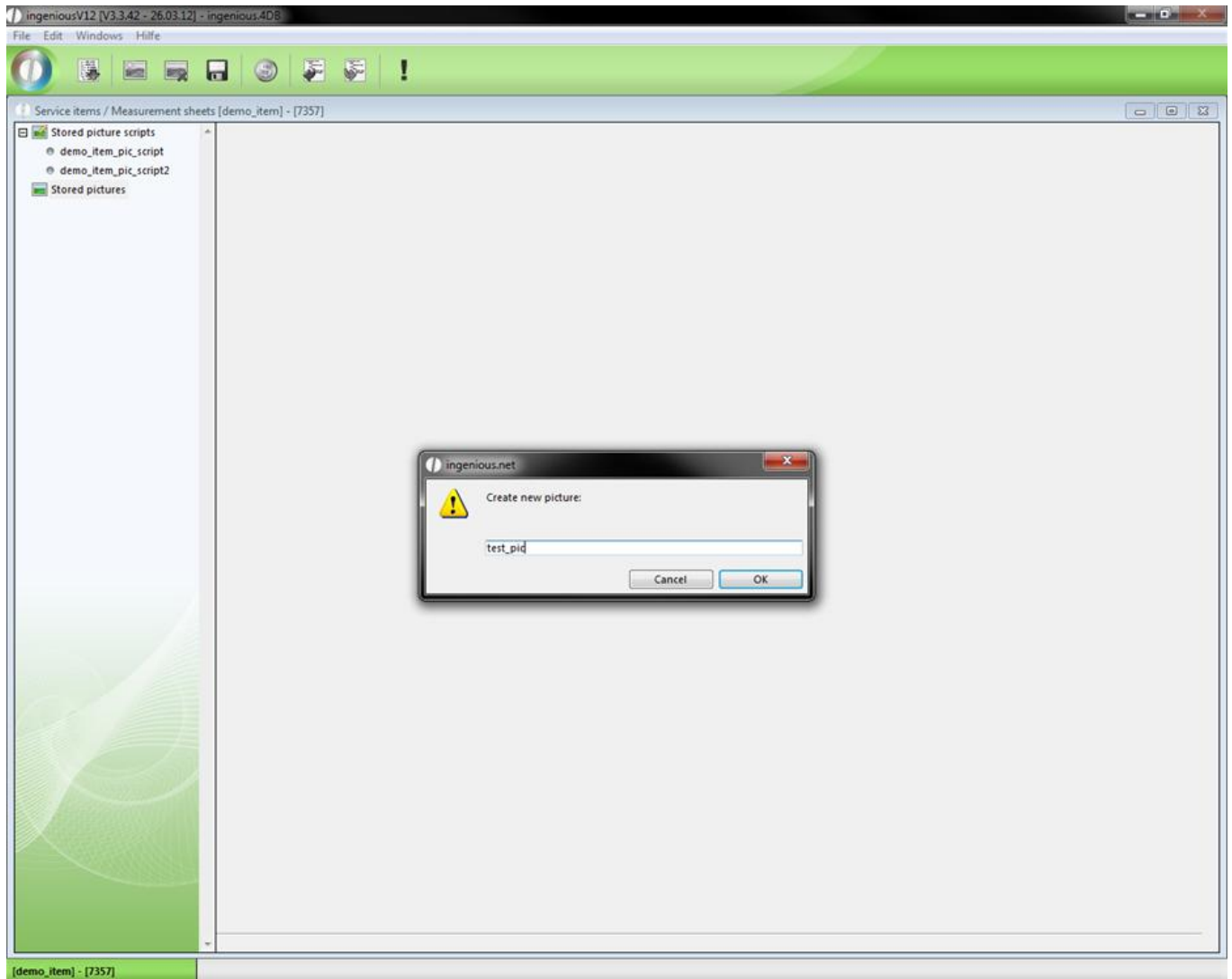
If the factor is greater than 1 the picture size increases, if the factor is smaller than 1 the picture size decreases.

Example: ResizeImage(0,5) - Picture scales down to half side length.

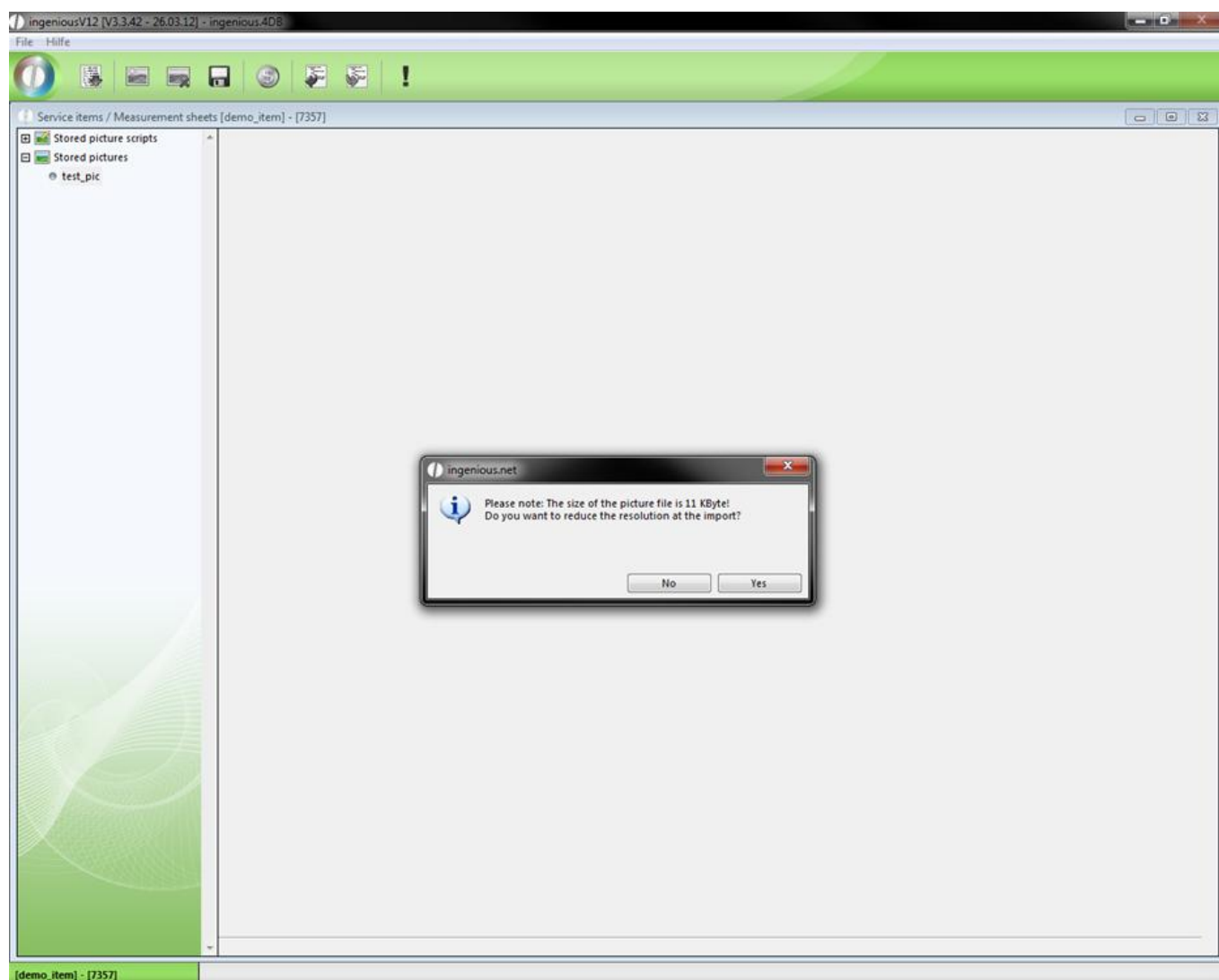
Stop

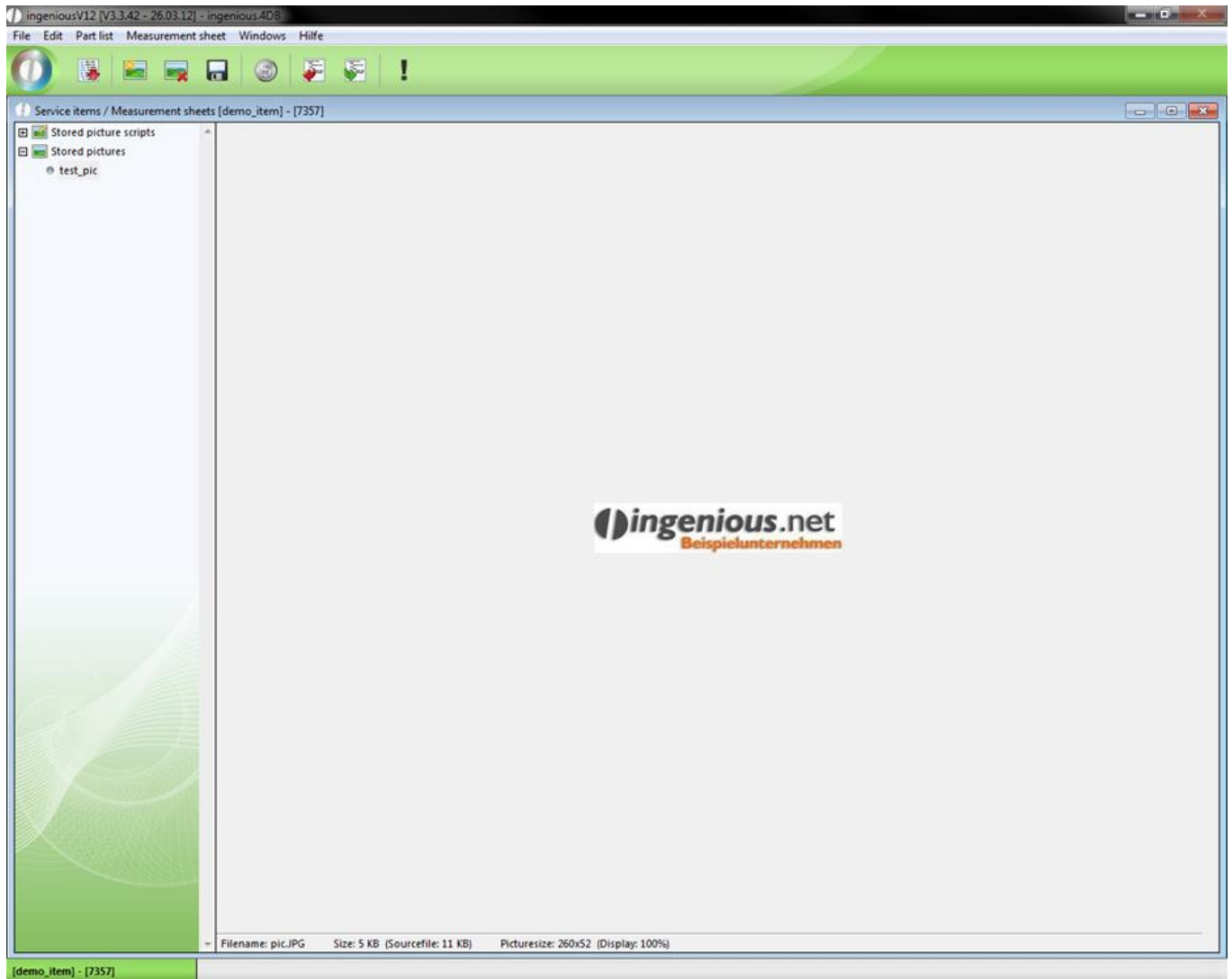
The command stops the calculation of the picture.

To add a picture to the measurement sheet, go to the folder "Stored pictures" and click on . At first you have to enter a name for the picture, and then click on  "Import script from file". The default windows file picker will open up where you can choose the desired picture.



Depending on the size of the picture a dialog will be displayed where you can reduce the picture resolution.





In addition to the import you can also export picture scripts with the button .

The place holder {DrawPic("script name")} provides a opportunity to insert picture scripts and pictures directly into the measurement sheet, that they can be printed.

3.2.3.5 Printing measurement sheets

To print out a measurement sheet there are 2 possibilities. Either you print it directly from the item overview on the particular project or you create a report.

Printing from the item overview

When you are in the item overview of a project, mark the items that should be used in the measurement sheet and click in the menu "Print" on "Item measurement sheet".

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious40B

File Items Options View Print Print preview Windows Hilfe

Projects detail view [White Productions] - [Invoice ID4022012/00040]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross	PP
1			rolling shutters first floor									
1.001	Superior Hi	PL_SH_SH	Security Rolling Shutter	20.00	20.000	40.000	3,107.00	17,261.11	345,222.21	0.00	345,222.21	1,516.
1.002	Superior Hi	PL_SH_SH	Security Rolling Shutter	10.00	10.000	40.000	3,913.41	10,870.58	108,705.78	0.00	108,705.78	1,188.
1.003	Superior Hi	PL_SH_SH	Security Rolling Shutter	10.00	20.000	30.000	3,042.78	12,678.23	126,782.34	0.00	126,782.34	725.
2			accordions second floor									
2.001	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	10.00	50.000	12.000	72.86	303.60	3,035.96	0.00	3,035.96	566.
3			awnings terrace									
3.001	Little_Big_S_Awn	PL_AW_BS	Retractable awning type "little big s"	1.00	10.000		2,989.86	2,491.55	2,491.55	0.00	2,491.55	1,233.

PP [USD] 5,231.45 Before CM = 572213 USD 10938% Calculated time 00:00 Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 586,237.84 After CM = 572213 USD 10938% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 586,237.84

Footer text

[Invoice ID4022012/00040]

In the new window choose the desired measurement sheet and printer.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Item measurement sheet

Projects detail view [White Productions] - [Invoice ID4022012/00040]

Header text



Item	Items	ArtNo.	Name	Quantity	X inch	Y inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1			rolling shutters first floor									
1.001	Superior Hi	PL_SH_SH	Security Rolling Shutter	20.00	20.000	40.000	3,107.00	17,261.11	345,222.21	0.00	345,222.21	1,516.
1.002	Superior Hi	PL_SH_SH	Security Rolling Shutter	10.00	10.000	40.000	3,913.41	10,870.58	108,705.78	0.00	108,705.78	1,188.
1.003	Superior Hi	PL_SH_SH	Security Rolling Shutter	10.00	20.000	30.000	3,042.78	12,678.23	126,782.34	0.00	126,782.34	725.
2			accordions second floor									
2.001	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	10.00	50.000	12.000	72.86	303.60	3,035.96	0.00	3,035.96	566.
3			awnings terrace									
3.001	Little_Big_S_Awn	PL_AW_BS	Retractable awning type "little big s"	1.00	10.000		2,989.86	2,491.55	2,491.55	0.00	2,491.55	1,233.

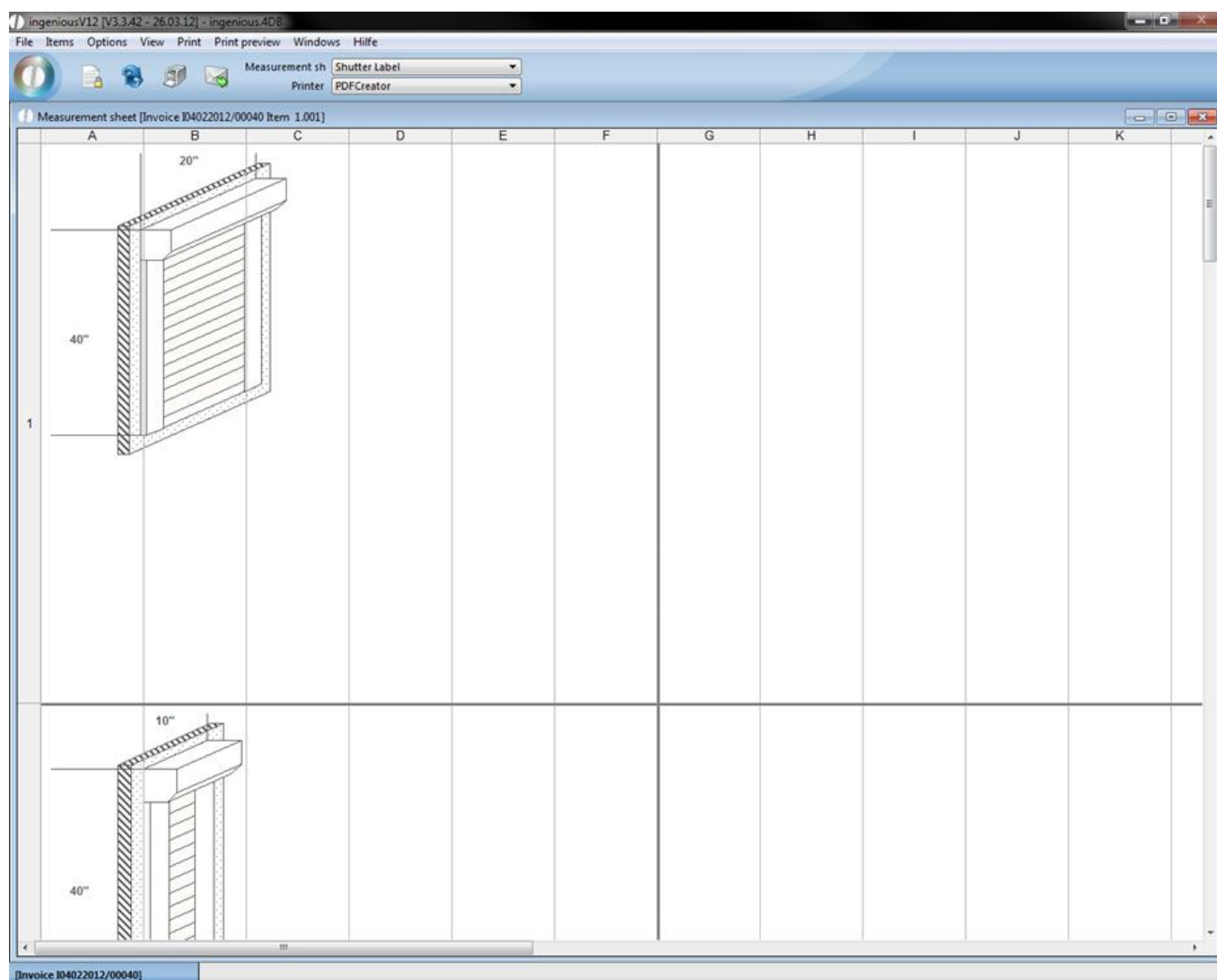
PP [USD] 5,231.45 Before CM = 572213 USD 10938% Calculated time 00:00 Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 586,237.84 After CM = 572213 USD 10938% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 586,237.84

Footer text

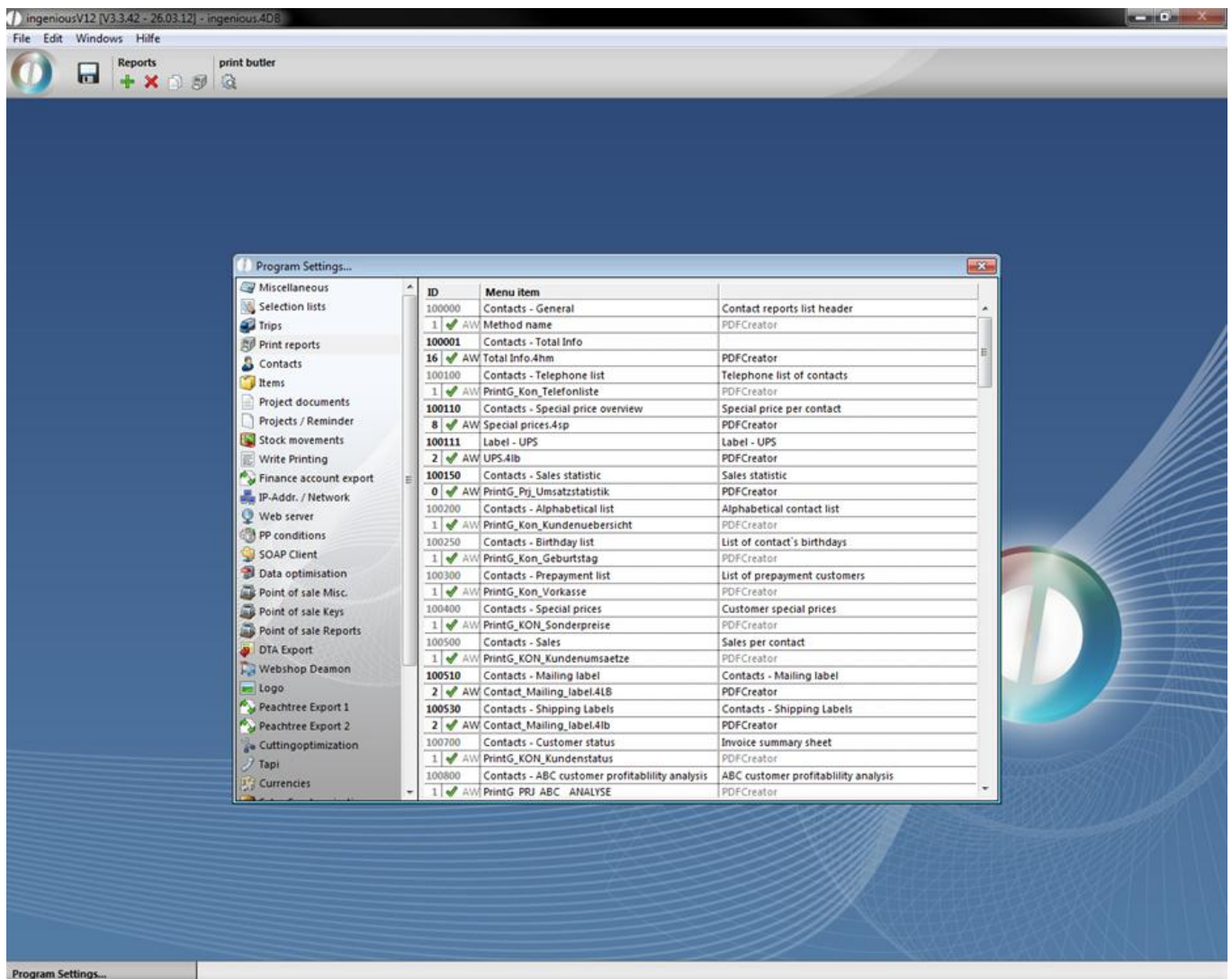
[Invoice ID4022012/00040]


When you click on  the measurement sheet will be displayed. The button  provides the opportunity to edit the measurement sheet. With a click on the printer symbol you can print the displayed sheet.

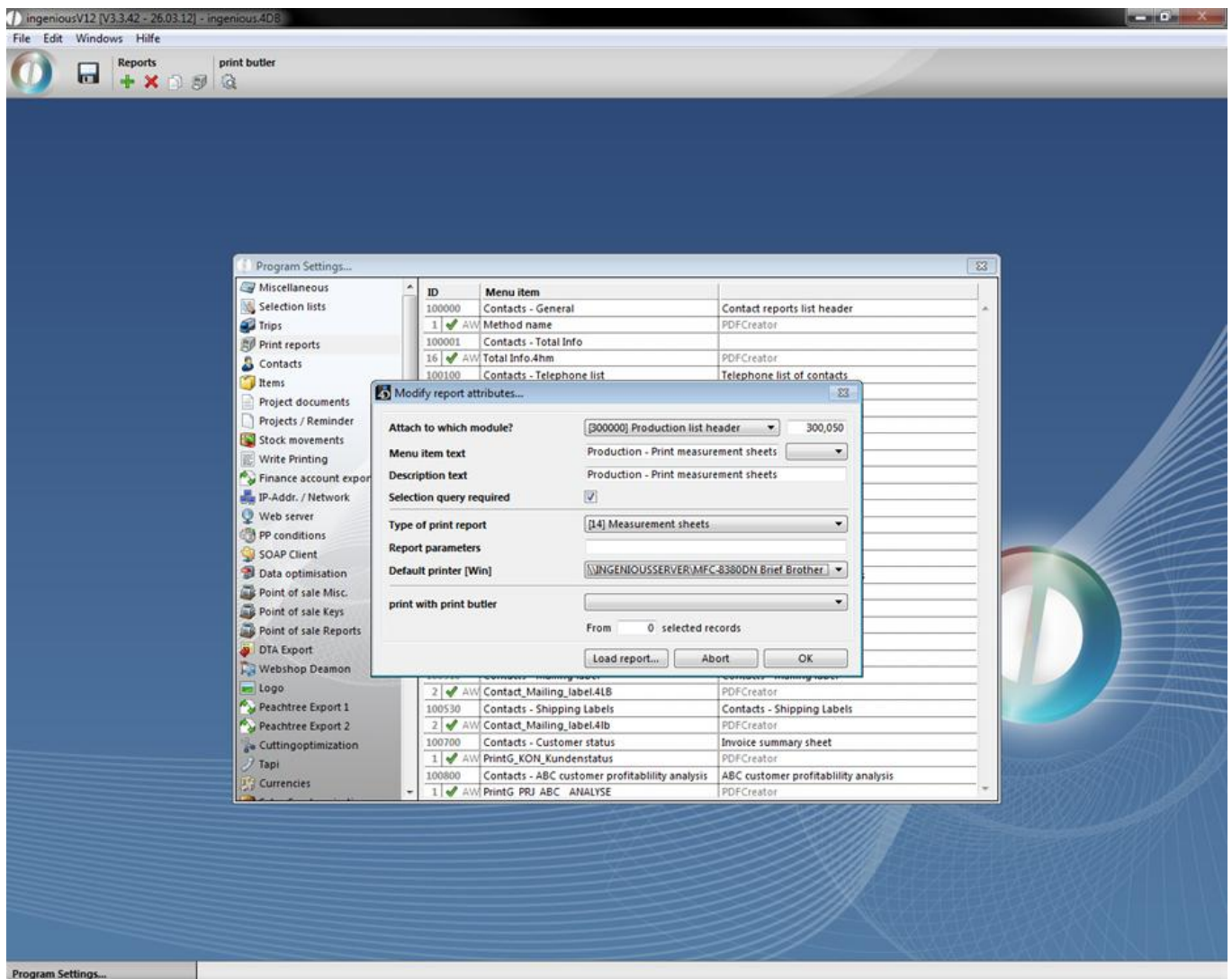


Printing with the help of a report

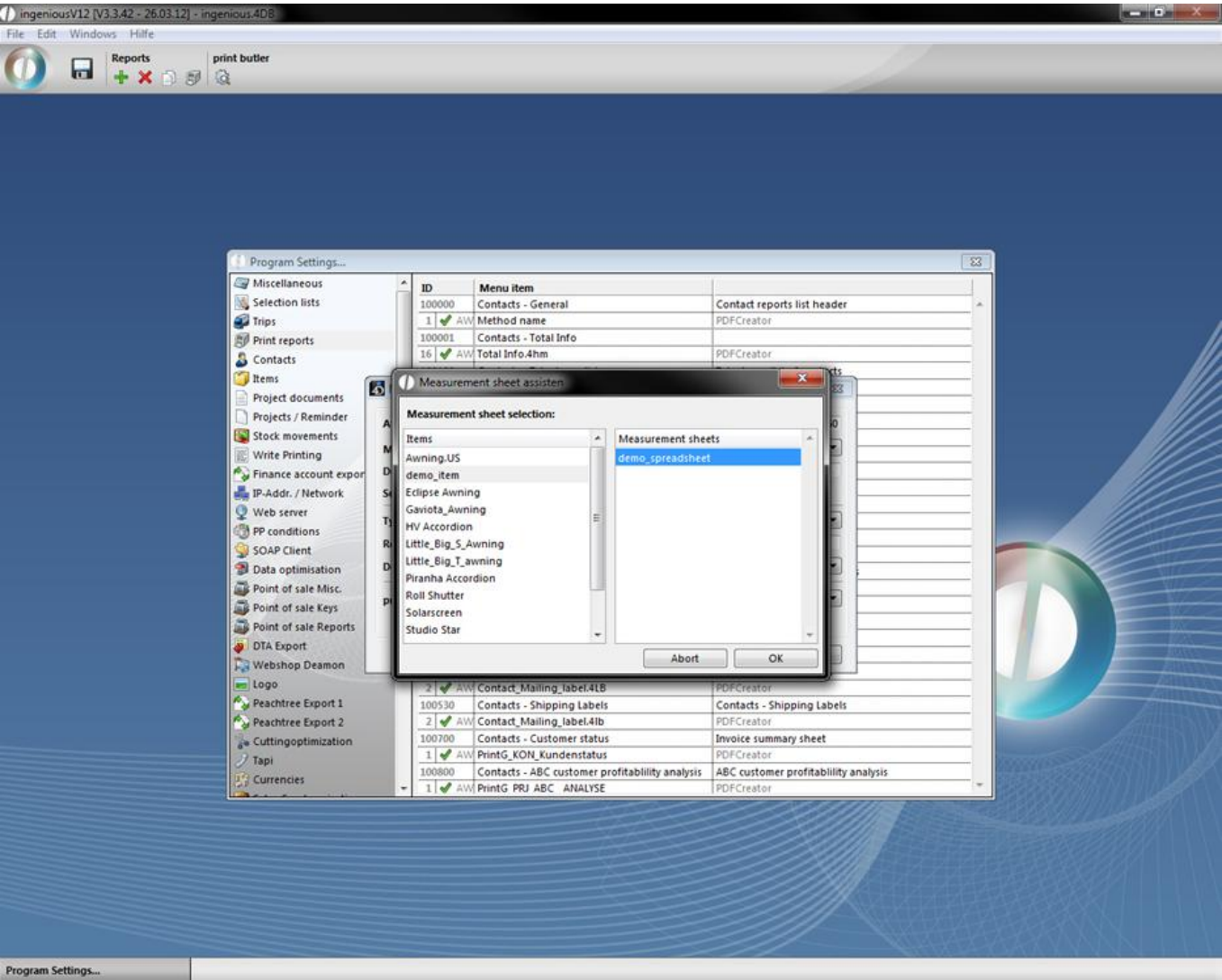
To create a print report you have to go to the program settings and select the category "print reports".

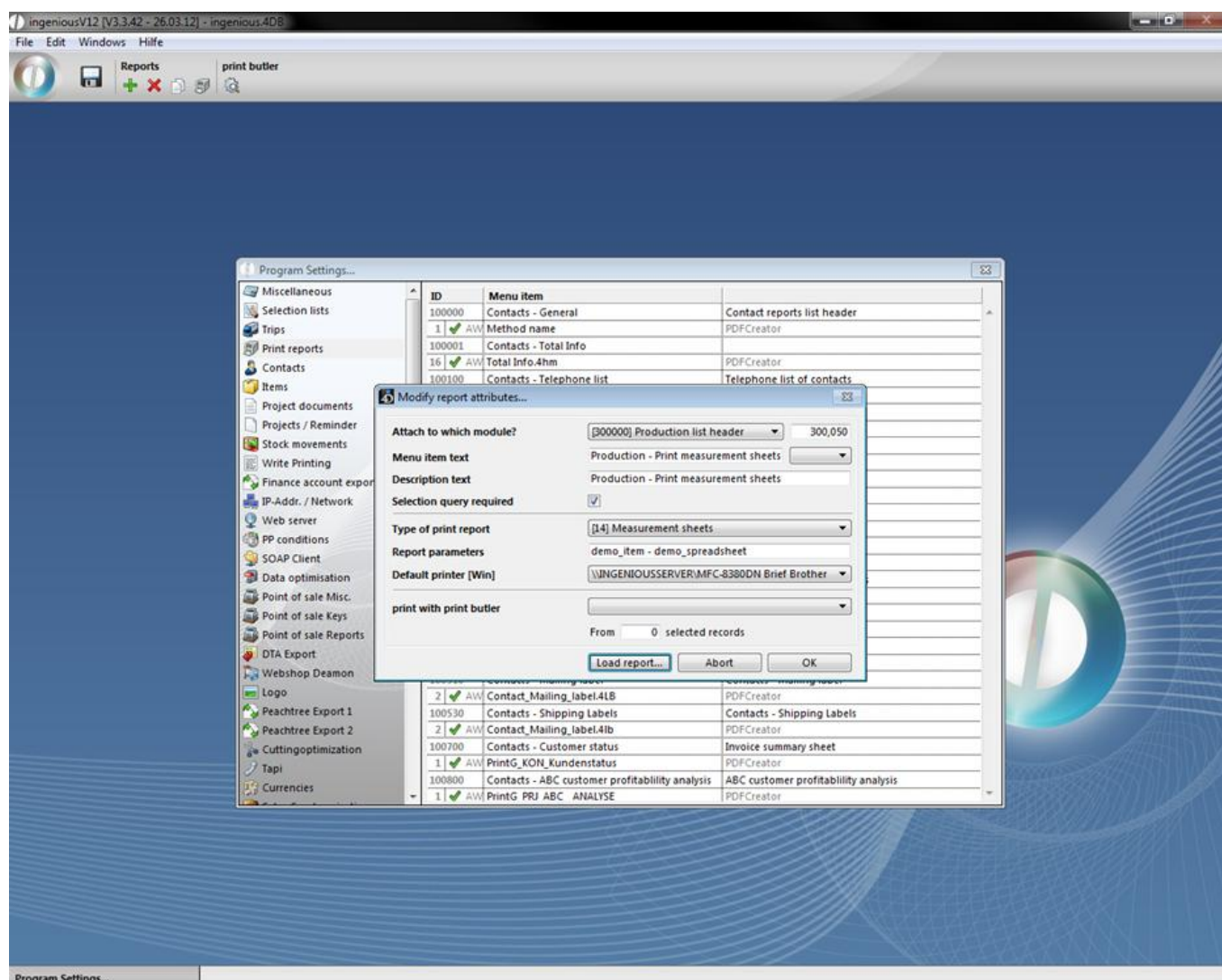


Click on the button  and the window "modify report attributes..." will open up, where you can configure the new print report. You can attach the report to any workflow module (like projects). Here it is important that you choose for "type of print report" the value "[14] Measurement sheets".

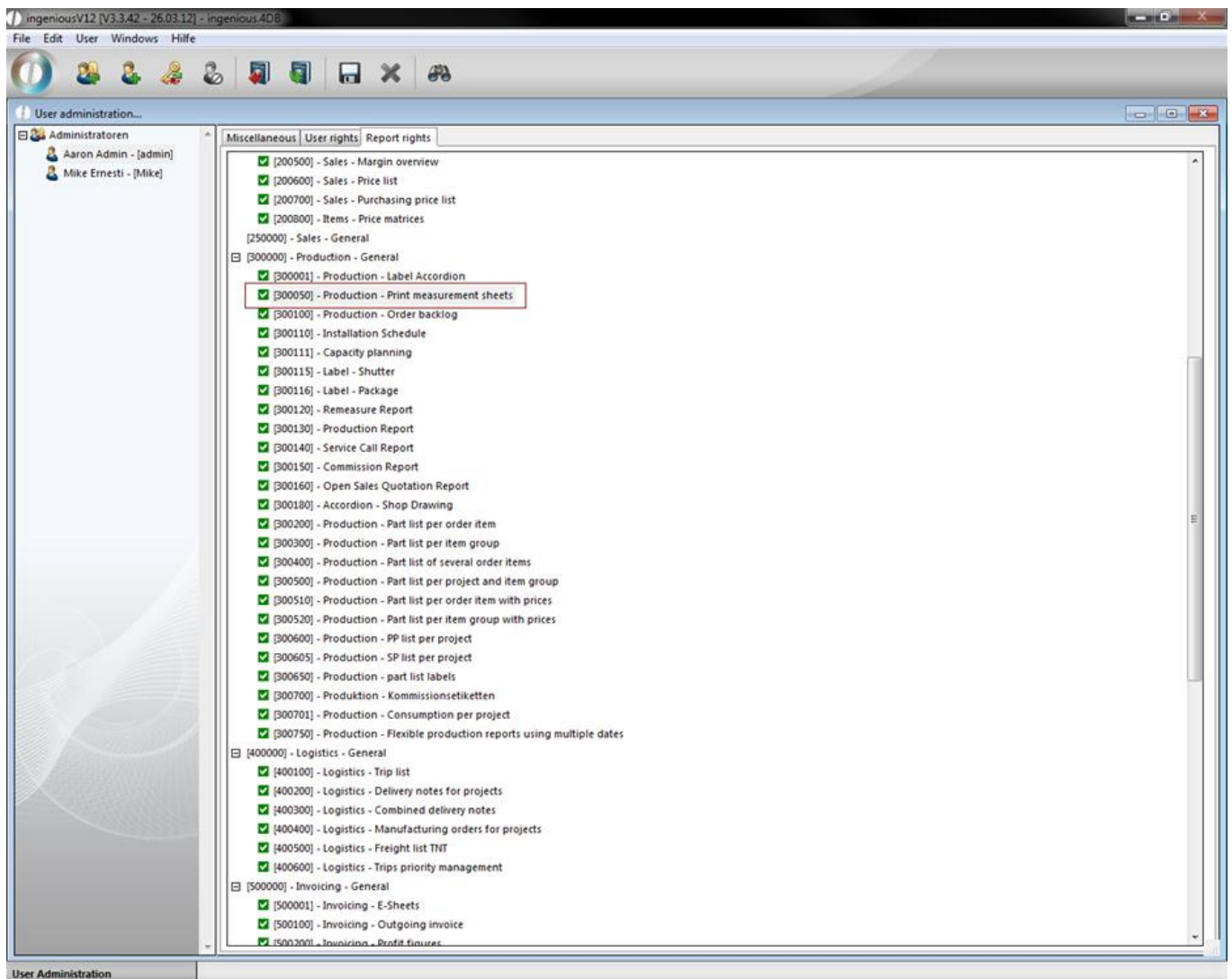


When you click on "Load report..." the measurement sheet assistant will open up showing all available items with the corresponding measurement sheets. With a mouse click you can choose the desired item and measurement sheet and confirm the selection.

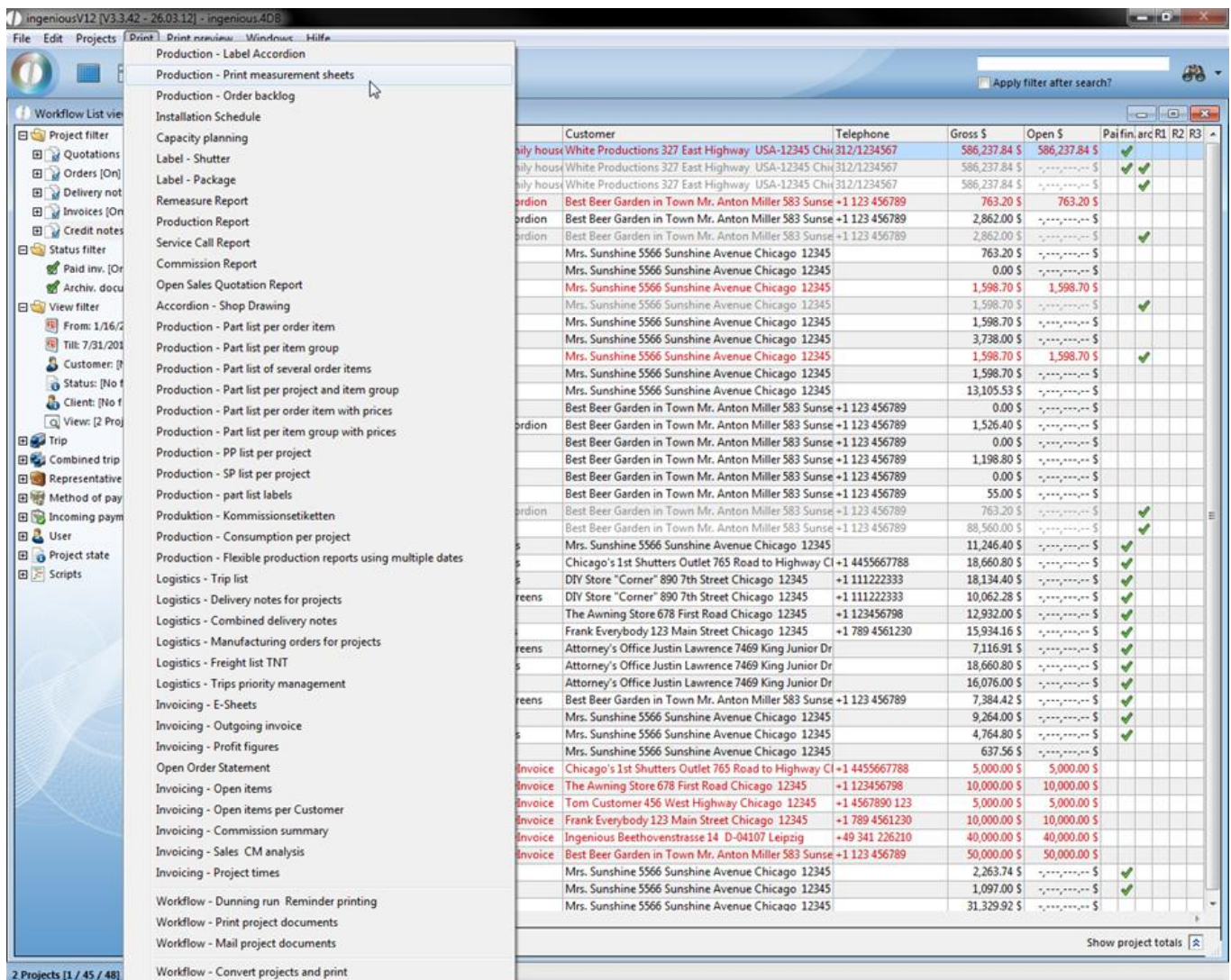




Confirm the dialog with "OK" and save the program settings on exit. To use the print report, you have to enable the corresponding report right.



With the help of the new print report now you can print measurement sheets directly from the project list view or the project detail view by clicking in the print menu on the newly created report.



Manufacturing documents

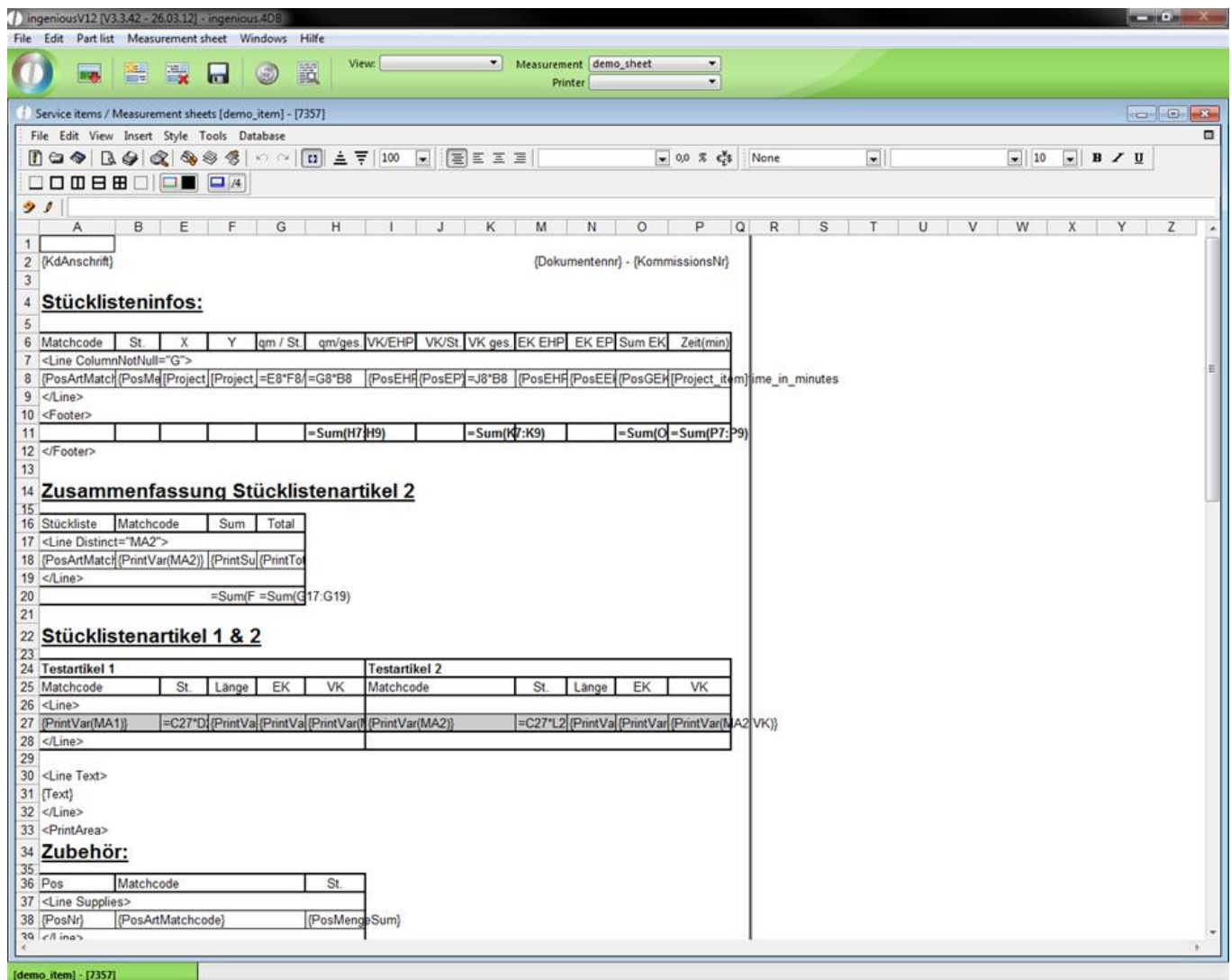
Ingenious.V12 View manufacturing documents allow the creation of flexible and professional spreadsheets with the integrated table calculation. You can freely decide what, where and how information should appear on the manufacturing documents.

Creation of the printing report templates (Spreadsheets)

Area	Border	Comments
HEADER	<Header> ... </Header>	<p>In this area, the following references or 4D phrase can be used:</p> <p>4D view field reference from the tables [Projects] and [contacts], i.e., [Projects] document description</p> <p>Most Ingenious.V12 placeholders for projects, i.e., {reference}.</p> <p>The complete parts list language, i.e., jum. Lamele, TAB., MID (...), etc.</p> <p>All 4D View formulae, operators, operants and functions, i.e. paragraph, Round Lookup etc.</p>
FOOTER	<Footer> ...	<p>In this area all phrases can be used as they are in the HEADER area.</p>

	</Footer>	Sum calculations occur here with the use of the 4D view formula SUM, i.e., = SUM (B\$22:B26).
LINE	<Line> ... </Line>	<p>This area is repeated for every well-chosen item of the suitable projects.</p> <p>The line area can also be a multi-line, i.e. per item 2, 3, 4, etc. is printed ... etc.</p> <p>In this area the following references or phrases can be used:</p> <p>4D view field reference from the tables [Projects], [Contacts], and [Items], i.e., [Items] X sum</p> <p>Most Ingenious.V12 placeholders for items, i.e., {PostArtMatchcode}.</p> <p>Variables from the defined service items or the checklist of the parts list with the use of the syntax {PrintVar (...)}, i.e., {PrintVar (Pogon)}.</p> <p>All 4D view formulae, operators, operants and functions, i.e., =IF (STRING (J25) = "1"; "X"; " ").</p>
LINE Distinct	<Line Distinct="X"> ... </Line>	<p>In this area an evaluation occurs such as line tags with the following change:</p> <p>With this line command, all items that have the same value X are summarized.</p>
LINE VarNotNull	<Line VarNotNull="X"> ... </Line>	<p>In this area an analysis occurs such as line tags with the following change:</p> <p>With these commands, all item lines that have the variable X or the value "" or 0 are hidden.</p>
LINE ColumnNotNull	<Line ColumnNotNull="X"> </Line>	<p>In this area, an analysis occurs such as line tags with the following change:</p> <p>With these orders all item lines are hidden if the column X has the value "" or 0.</p>
LINE Supplies	<Line Supplies> ... </Line>	<p>In this area an evaluation occurs such as line tags with the following change:</p> <p>All marked items that have no spreadsheet are issued.</p> <p>No output of the item data occurs to which the item data belongs.</p>
LINE Multisort	<Line Multisort= "jum.XXX;>jum.YYY;<" > ... </Line>	<p>In this area an evaluation occurs such as line tags with the following change:</p> <p>It's possible to sort items according to multiple attributes, for instance</p> <p><Line Multisort="jum.Type;>jum.color;<jum.x;<"></p> <p>Items will be sorted ascending according to the type, descending to type and descending to length.</p>
PrintArea	<PrintArea>	The area between <PrintArea> and </PrintArea>

	... </PrintArea TestColumn="X">	TestColumn="X"> will be completely deleted if the conditions in the column X, in the </PrintArea TestColumn="X"> row is false. In the column X, next to </PrintArea>, a condition of the form must be listed: = (Calculation1=Calculation2). If the field is blank, the area is not shown.
STANDARD	...	This concerns all lines which stand outside the line parameters: In this area, all phrases of the HEADER and FOOTER area can be used. Sum calculations can be applied to cells which stand in lines above the formula. Sums over a line area occur with the 4D view formula SUM, i.e. =SUM (B23:B25), the letter specifies the column, the numbers specify the line numbers <line> and </line> lines.
Deleterow	<Deleterow>	Line will be deleted
Insertrow	<Insertrow XX>	Empty lines will be added. Instead of XX enter the number of empty lines.
Repeat	<Repeat XX> ... </Repeat>	Everything in this area will be displayed repeatedly according to the number in XX.



Example of a spreadsheet with templates

The screenshot displays the ingenious.V12 software interface. The top menu bar includes File, Items, Options, View, Print, Print preview, Windows, and Hilfe. Below the menu is a toolbar with icons for file operations and a dropdown menu for 'Measurement sh' set to 'demo_sheet'. The main window is titled 'Projects detail view [Ingenious] - [Quotation 04192012/00044]'. It contains a table with columns: Item, Items, ArtNo., Name, Quantity, X inch, Y inch, Flat pr., Unit pr., Net, VAT, Gross, and PP. The table lists six items, all with a quantity of 1.00 and a price of 70.00. Below this is a 'Measurement sheet [Quotation 04192012/00044 Item 001]' section. It includes a 'Stücklisteninfos:' table with columns: Matchcode, St, X, Y, qm / St, qm/ges, VK/EHP, VK/St, VK ges, EK EHP, EK EP, Sum EK, and Zeit(min). This is followed by a 'Zusammenfassung Stücklistenartikel 2' table with columns: Stückliste, Matchcode, Sum, and Total. The bottom of the interface shows a footer section with fields for PP [USD], Net [USD], VAT 0%, and Gross [USD], along with a 'Footer text' field.

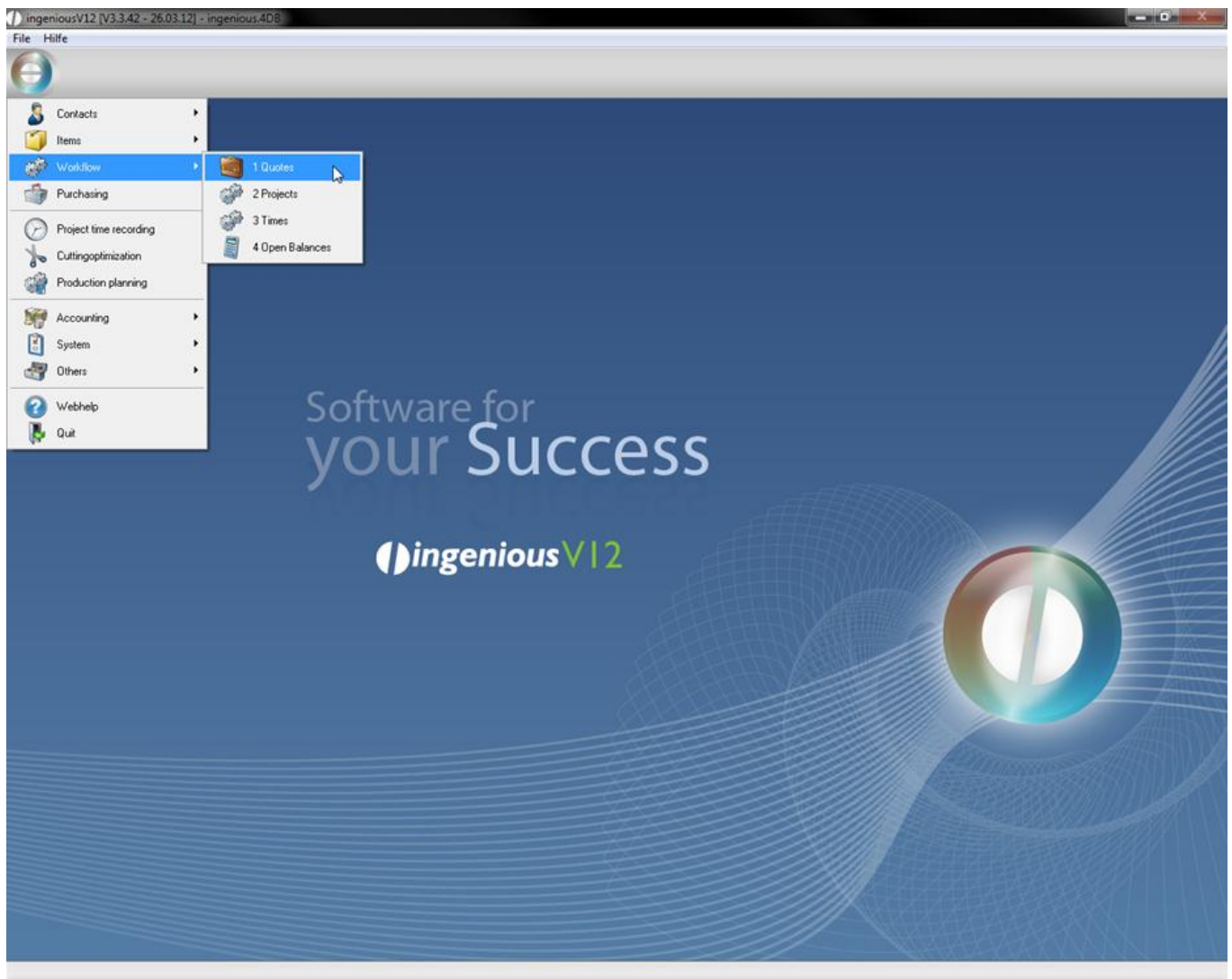
Print preview

While formatting a new report by using headers, lines and footers, it is recommended to analyze the Template, Test_1' of the item "Diamond". Tags for marking the single areas are always permitted only in the first column! Otherwise they are ignored. While creating templates, all important settings must be already marked for the print report, i.e., printing options, page setup, etc., so that the document can be immediately printed later with by clicking on the print icon.

3.3 Workflow

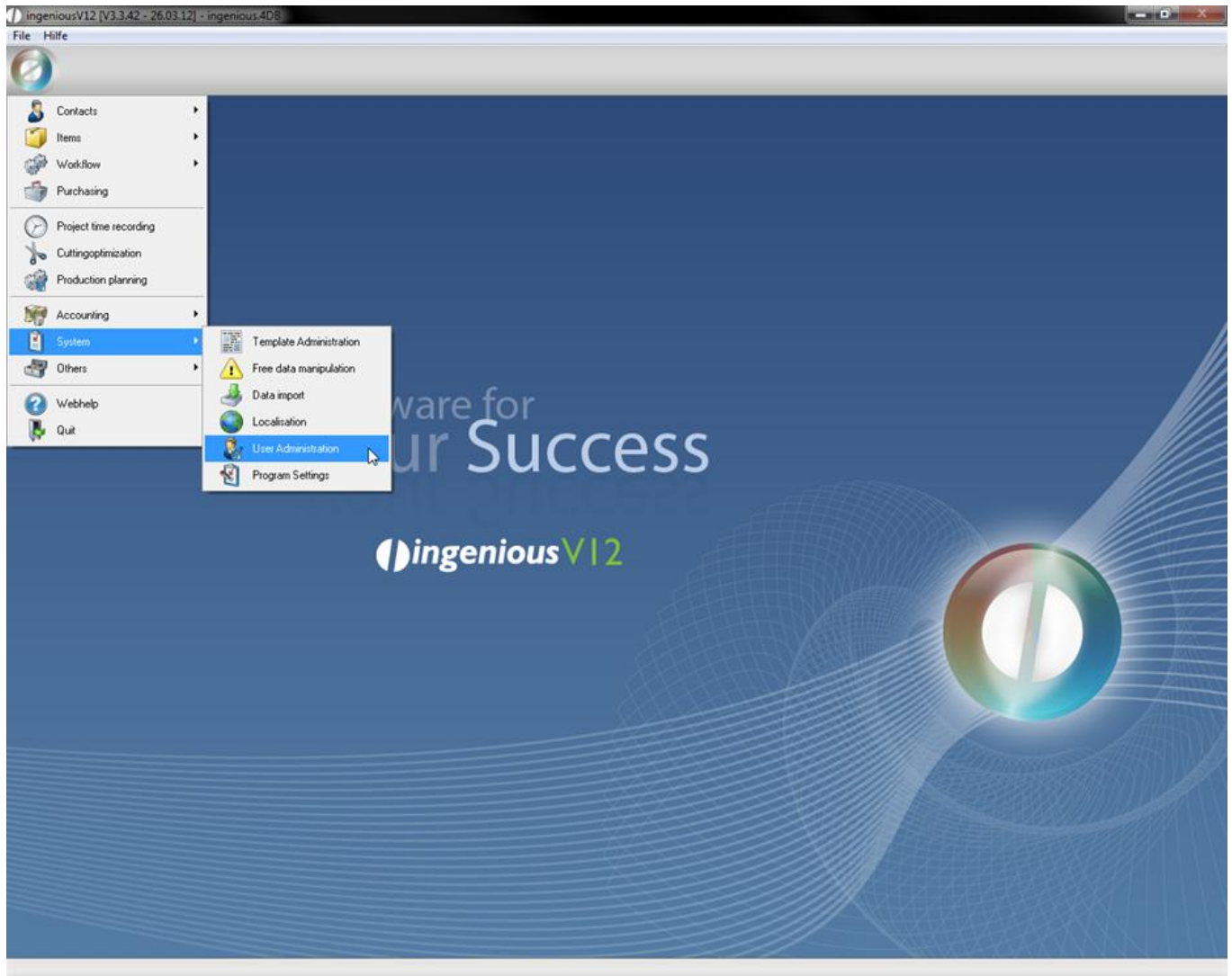
3.3.1 Workflow Projects

The workflow contains four different modules (sales, production, logistics and invoicing) in Ingenious.V12 which are indicated in the main menu with individual icons. Within the workflow modules, you can manage all your project documents ranging from the quotation to the payment reminder.

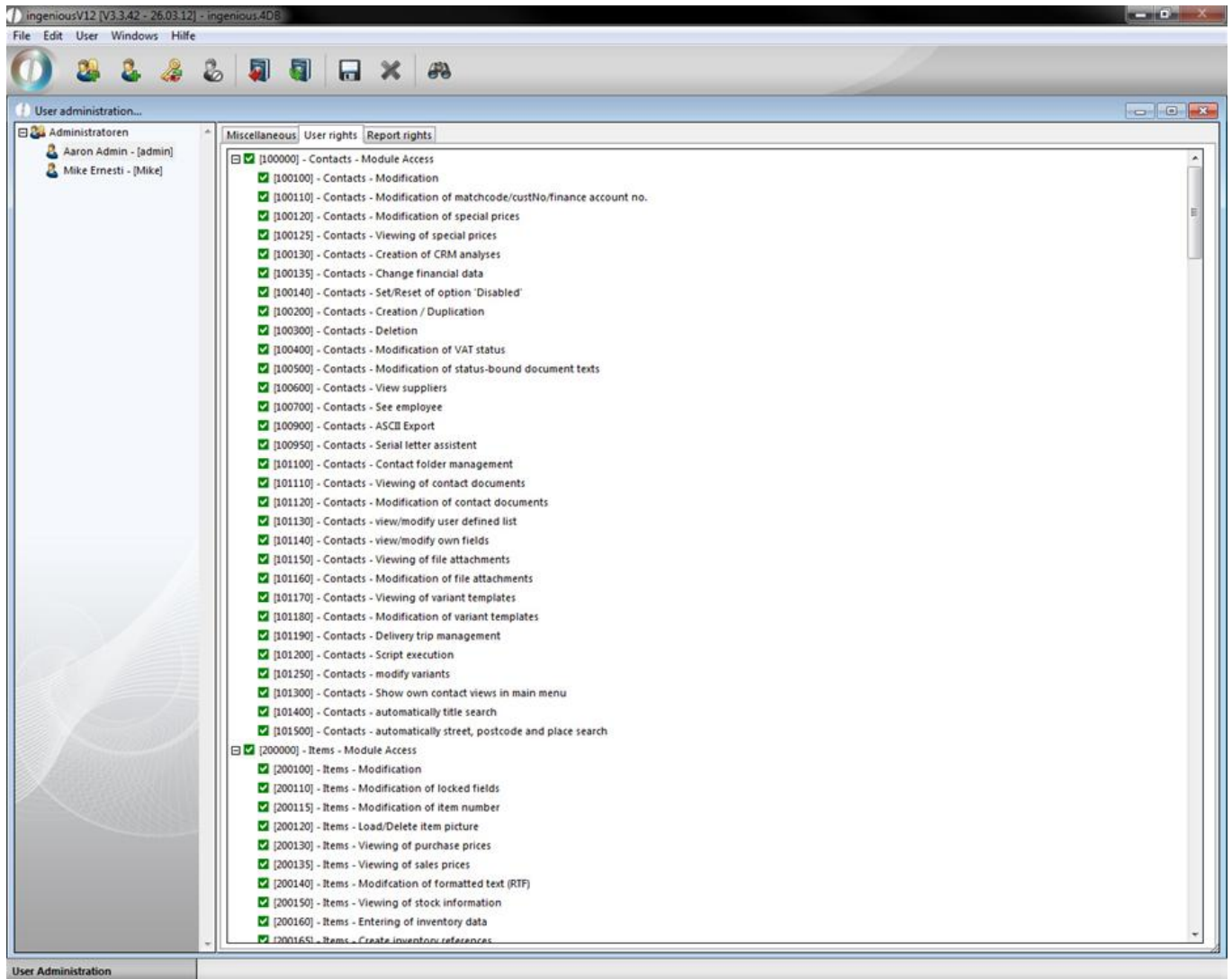


3.3.2 Workflow and user administration

Not every department needs access to all areas of the workflow. In the user administration, you determine who may do what in which modules with the corresponding rights. For the user administration, you arrive at the Ingenious.V12 menu item "System".

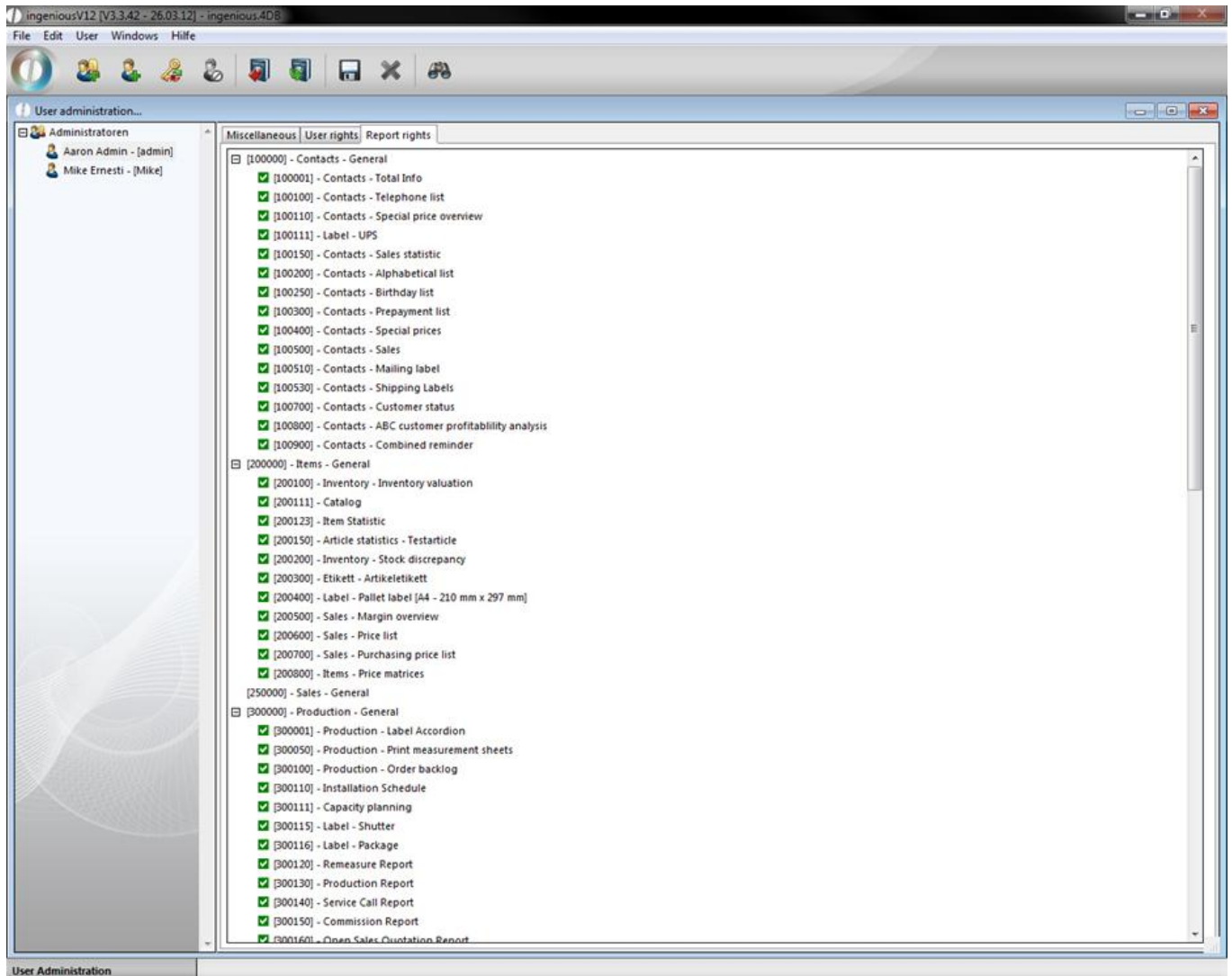


The green checkmark in front of the respective functions indicates the access right. By double-clicking on it, a red cross which closes the access for this function or the whole module appears.



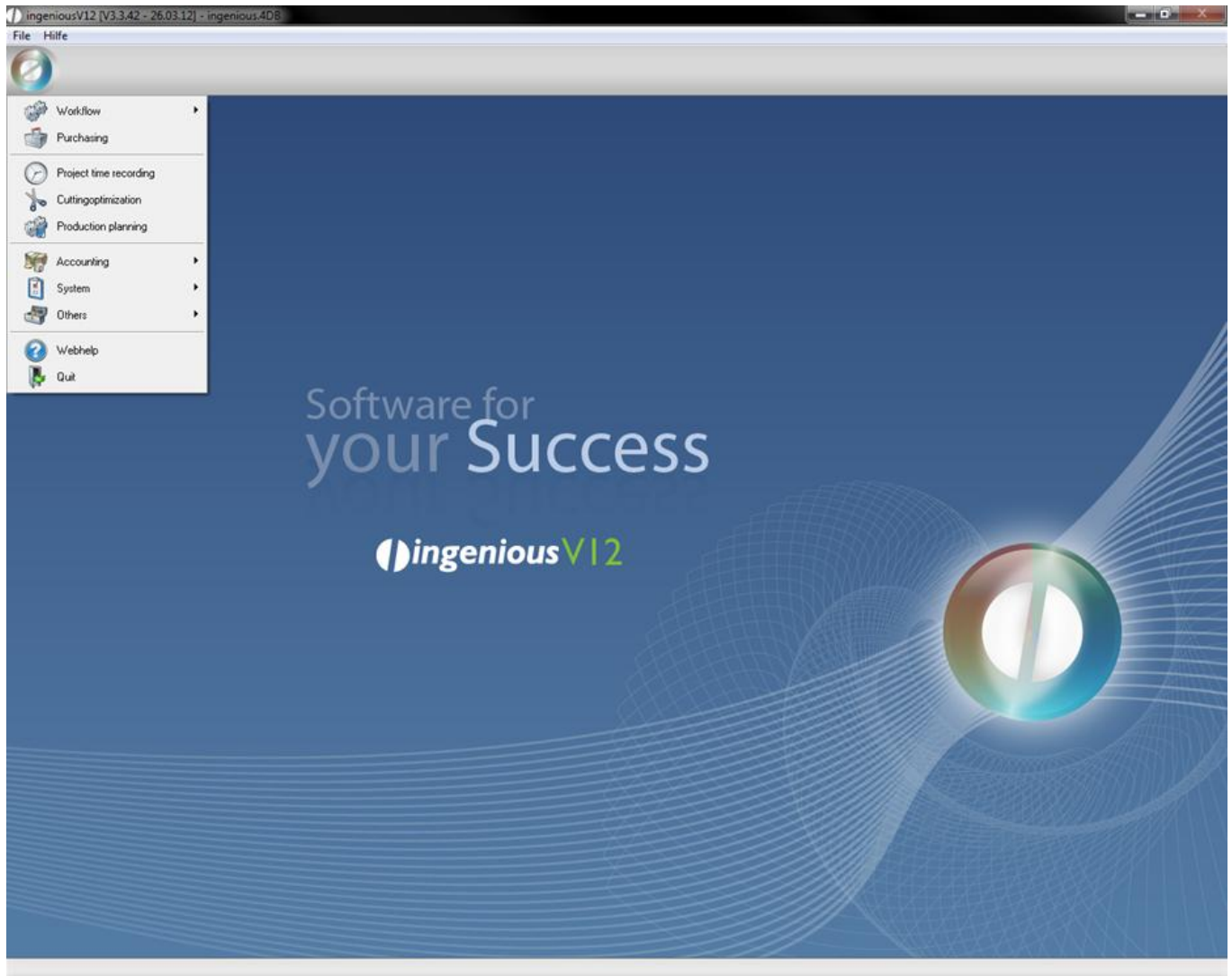
View of the user rights

You regulate the possibility for printing different reports the same way as in the report rights. This is how you guarantee that data security regulations are kept (i.e., on commission accounts) and you also guarantee that unauthorized users do not have access to internal information (e.g., profit figures).



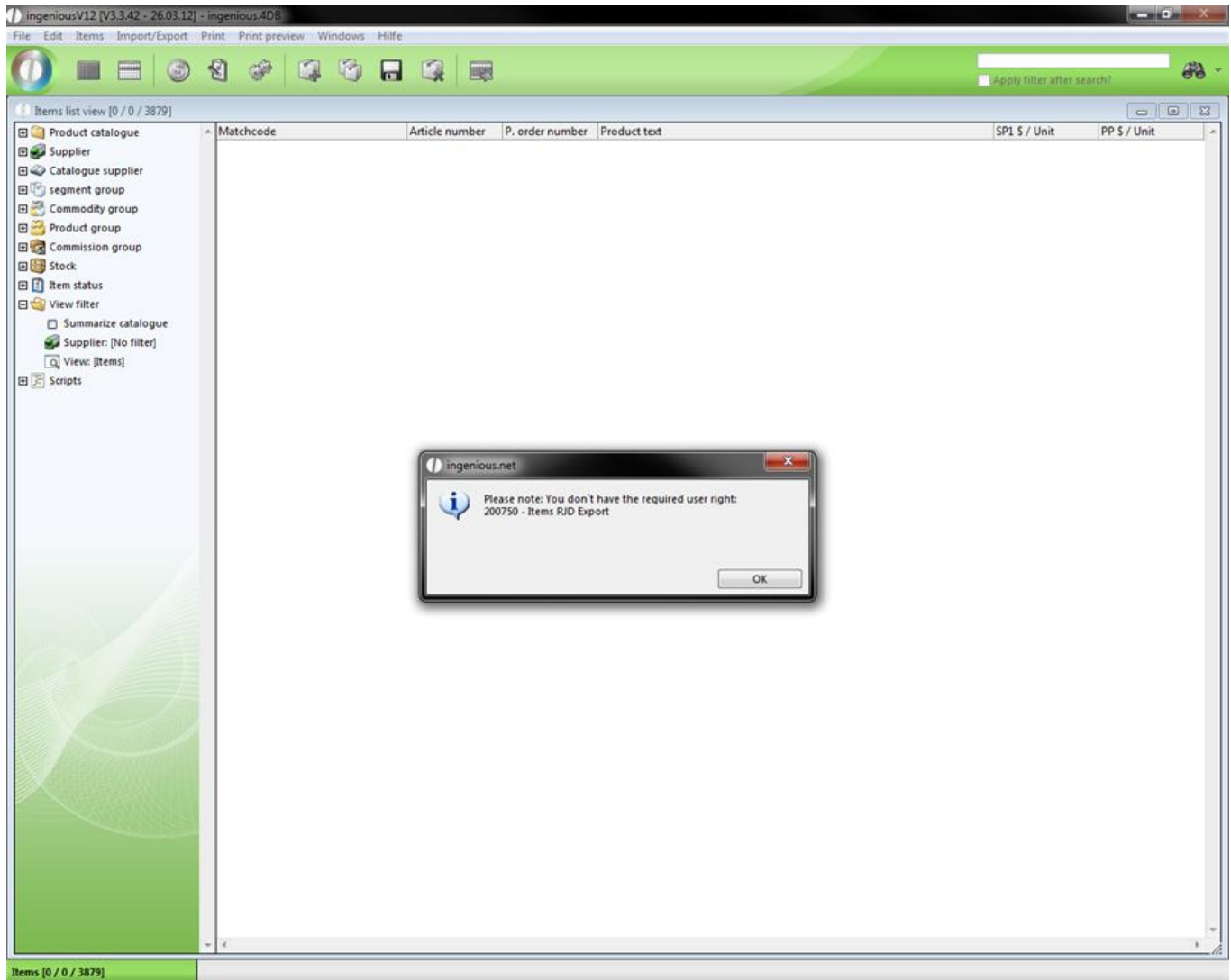
View of the report rights

All employees can have access to the necessary areas according to their expertise. An inadvertent deletion of important data is avoided as much as possible. Closed modules are no longer indicated in the main menu.



Sample view of locking the "Contacts" and "Items" modules

The documents locked for the respective administrators are not selectable. When attempting to open a document from a locked area, the user receives the following announcement.



Dialog field missing user rights

3.3.3 Workflow list view

3.3.3.1 Workflow list view

The list views in the workflow modules are kept in the same style, just as the other modules. On the left you will find the choice fields for the document filters and on the right appears the list with the questioned search results. You use the filters as usual. You can filter according to projects, statistics, time periods, trips, representatives, payment types, incoming payments, users and project status filter. In order to indicate the suitable projects, highlight the fields in front of the filter of the project and mark the status filters with a green checkmark. With the documents that should not be shown, you remove the checkmark. You make a change in each case by double-clicking the field in front of the filter description. Behind the name, the status "[in]" appears for a set filter or "[out]" from for a deactivated one. Afterwards click on project selection.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 45 / 48]


Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- Paid inv. [On]
- Archiv. documents [On]
- View filter
- From: 1/16/2006
- Till: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paid \$	fin.	arc	R1	R2	R3
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$						
Delivery note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$							
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$						
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$						
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$						
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$						
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456789	10,000.00 \$	10,000.00 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$						
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$						
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$							
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$							
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$							
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$							
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$							
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$							
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$							
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$							
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$							
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$							
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$							
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$							
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$							
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$							
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$							
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$							
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$							
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$							
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$							
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$							
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$							
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$							
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$							
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$							
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$							
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$							
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$							
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$							
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$							
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$							
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$							
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$							
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$							
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$							

Show project totals

2 Projects [1 / 45 / 48]

If you want to filter only according to open invoices in the sales list view, for example, place a checkmark only in the "Invoices" project filter and remove the checkmark in the status filter "Paid Invoices". If you now click on the update button , only the projects and documents relative to the query are shown.

The screenshot shows the 'ingenious.V12' application window. The title bar indicates the version is V3.3.42 and the date is 26.03.12. The menu bar includes File, Edit, Projects, Print, Print preview, Windows, and Hilfe. The toolbar contains various icons for file operations. The main window displays a 'Workflow List view' with a table of project documents. The table has columns for Project document, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and a 'Paid' checkbox. The table lists several invoices with their respective details. On the left, there is a sidebar with a 'Project filter' section containing checkboxes for 'Quotations [Off]', 'Orders [Off]', 'Delivery notes [Off]', 'Invoices [On]', 'Credit notes [Off]', and 'Status filter'. Below this, there are 'View filter' options for 'From', 'Till', 'Customer', 'Status', 'Client', and 'View'. The bottom status bar shows '2 Projects [1 / 8 / 48]'.

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paid
Invoice	104022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$	<input checked="" type="checkbox"/>
Invoice	103232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$	<input type="checkbox"/>
Invoice	103082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$	<input type="checkbox"/>
Invoice	103082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$	<input type="checkbox"/>
Invoice	103082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$	<input type="checkbox"/>
Invoice	103082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$	<input type="checkbox"/>
Invoice	103082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$	<input type="checkbox"/>
Invoice	103082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$	<input type="checkbox"/>

Filter-updated query

In the report filter, you can determine the time period in which certain documents have been created. After double-clicking on the icon, a calendar appears with which you can comfortably choose the desired beginning date or final date. By clicking on the contact, you arrive at the contact module and you can accept by double-clicking on the desired record for the filter query.

The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408 application window. The main area shows a 'Workflow List view [1 / 8 / 48]' with a table of project documents. A 'View filter' dialog box is open, showing a date range from 1/16/2006 to 7/31/2017 and a calendar for March 2012.

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	104022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	103232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	103082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	103082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	103082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	103082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	103082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	103082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

The 'View filter' dialog box shows the following settings:

- From: 1/16/2006
- Till: 7/31/2017
- Customer: []
- Status: [No f]
- Client: [No f]
- View: [2 Pro]
- Method of pay
- Incoming paym
- User
- Project state
- Scripts

Buttons: Abort, Save

The "Project status" folder contains a large number of other filter possibilities that you can define in the program settings. You determine the project status with the project settings.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 45 / 48]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- View filter
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
 - [empty - not assigned]
 - 1.Waiting Measurement
 - 2.Already Remeasured
 - 3.Open Purchase Order
 - 4.Production
 - 5.Installation
 - 6.Closed
 - 7.Holds
 - 8.Service Calls Contract
 - 9.Service Calls
 - 9.Service Scheduled
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Quotation - Roll	03162012/00000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$						
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$						
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Chi	+1 4455667788	5,000.00 \$	5,000.00 \$					
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Chi	+1 4455667788	18,660.80 \$						
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Delivery note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					

Show project totals

2 Projects [1 / 45 / 48]

Besides you can even show only the documents created by you. By clicking on your name in the "User" folder, the respective documents are filtered. You will proceed exactly the same way in the search of projects of single representatives, trips or payment type. You will soon estimate the filter function if the number of the projects and documents on an unclear number has evolved.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious4DB

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 7 / 48]


Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- View filter
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
 - [tester]
 - Aaron Admin [admin]
 - Mike Ernesti [Mike]
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					

Show project totals

2 Projects [1 / 7 / 48]

In the list view you can have the sum of the current view displayed by clicking **Show project totals** . In the calculation all columns having a dollar value will be included.

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File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 45 / 48]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- View filter
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
 - [Tester]
 - Aaron Admin [admin]
 - Mike Ernesti [Mike]
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Pa fin	arc	R1	R2	R3
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Delivery note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
Order confirmation	03082012/00030	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		7,363.74 \$						
						Gross \$	Open \$					
						586,237.84 \$	586,237.84 \$					


Hide project totals

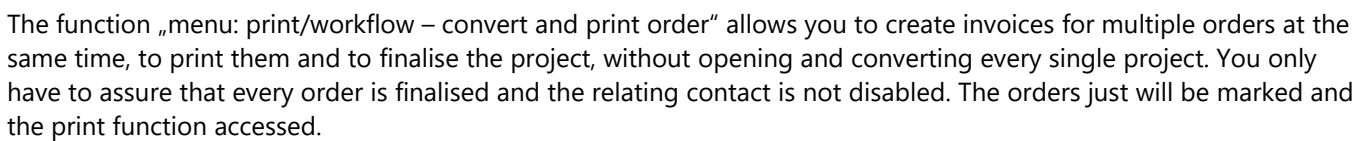
2 Projects [1 / 45 / 48]

3.3.3.2 Printing lists

In the workflow list views, you will find different print lists under the "Print" menu item that correspond to the user rights of the single areas. These lists take into consideration all projects that were selected with the filter function and possibly also by marking. Ingenious.V12 delivers a huge number of prefabricated lists that can be adapted and expanded according to your needs.

Customer	Telephone	Gross \$	Open \$	Pa fin.	arc	R1	R2	R3
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
The Awnning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
The Awnning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$						

You can print several documents of the list view at the same time. Highlight the records to be printed and choose the desired print list. Now in the print dialog window that appears, highlight "All selected" or in order to print all documents of the list, select "All called". All desired documents are sent to the standard printer. In order to look at the document in the page view before printing, select the "Print preview" field in the print dialog window. You can scroll through the pages with the help of the arrows and you can zoom in on the document with the magnifying glass. Finally you print the document by clicking on the printer icon . If the document does not correspond to your expectations, you can cancel by clicking on the cross in print job. With quick printing, the positions are given in the ASCII format. The integrated word processing is available to you in the detailed view of the project documents for individual formatting.



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File Edit Projects Print Print preview Windows Hilfe

Workflow List view [2 / 45 / 48]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- View filter
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
 - [Tester]
 - Aaron Admin [admin]
 - Mike Ernesti [Mike]
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation - Roll	03162012/00000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	3,738.00 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	04022012/00068	03/12/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	586,237.84 \$						
Order confirmation	03232012/00067	03/23/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03082012/00052	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	11,246.40 \$						
Order confirmation	03082012/00051	03/08/12		Highway Cl	+1 4455667788	18,660.80 \$						
Order confirmation	03082012/00050	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,134.40 \$						
Order confirmation	03082012/00049	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	12,932.00 \$						
Order confirmation	03082012/00047	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	15,934.16 \$						
Order confirmation	03082012/00046	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	7,116.91 \$						
Order confirmation	03082012/00045	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
Order confirmation	03082012/00044	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	10,076.00 \$						
Order confirmation	03082012/00043	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	9,264.00 \$						
Order confirmation	03082012/00040	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	637.56 \$						
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	2,263.74 \$						
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,097.00 \$						
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	31,329.92 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago	12345	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago	12345	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago	12345	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
Delivery note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$	1,598.70 \$					

Convert orders and print

New document

Convert to: Invoice

☐ Keep header + footer ☒ Keep real times

☐ Keep document no.

Old document

☐ Retain unchanged

☒ Retain and archive

☐ Don't retain

Abort OK

Show project totals

2 Projects [2 / 45 / 48]

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File Edit Projects Print Print preview Windows Hilfe

Workflow List view [2 / 45 / 48]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [On]
- Invoices [On]
- Credit notes [On]
- Status filter
- View filter
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
 - [Tester]
 - Aaron Admin [admin]
 - Mike Ernesti [Mike]
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation - Roll	03162012/00000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	3,738.00 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	11,246.40 \$						
Order confirmation	03082012/00051	03/08/12		CI +1 4455667788		18,660.80 \$						
Order confirmation	03082012/00050	03/08/12		+1 111222333		18,134.40 \$						
Order confirmation	03082012/00049	03/08/12		+1 111222333		10,062.28 \$						
Order confirmation	03082012/00048	03/08/12		+1 123456798		12,932.00 \$						
Order confirmation	03082012/00047	03/08/12		+1 789 4561230		15,934.16 \$						
Order confirmation	03082012/00046	03/08/12		Dr		7,116.91 \$						
Order confirmation	03082012/00045	03/08/12		Dr		18,660.80 \$						
Order confirmation	03082012/00044	03/08/12		Dr		16,076.00 \$						
Order confirmation	03082012/00043	03/08/12		Dr		7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	637.56 \$						
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	2,263.74 \$						
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,097.00 \$						
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	31,329.92 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway CI	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago	12345	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago	12345	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago	12345	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
Delivery note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$	1,598.70 \$					

ingenious.net

Question: 2 of 2 marked projects were converted and finalised. Save changes and start print merge?

Cancel OK

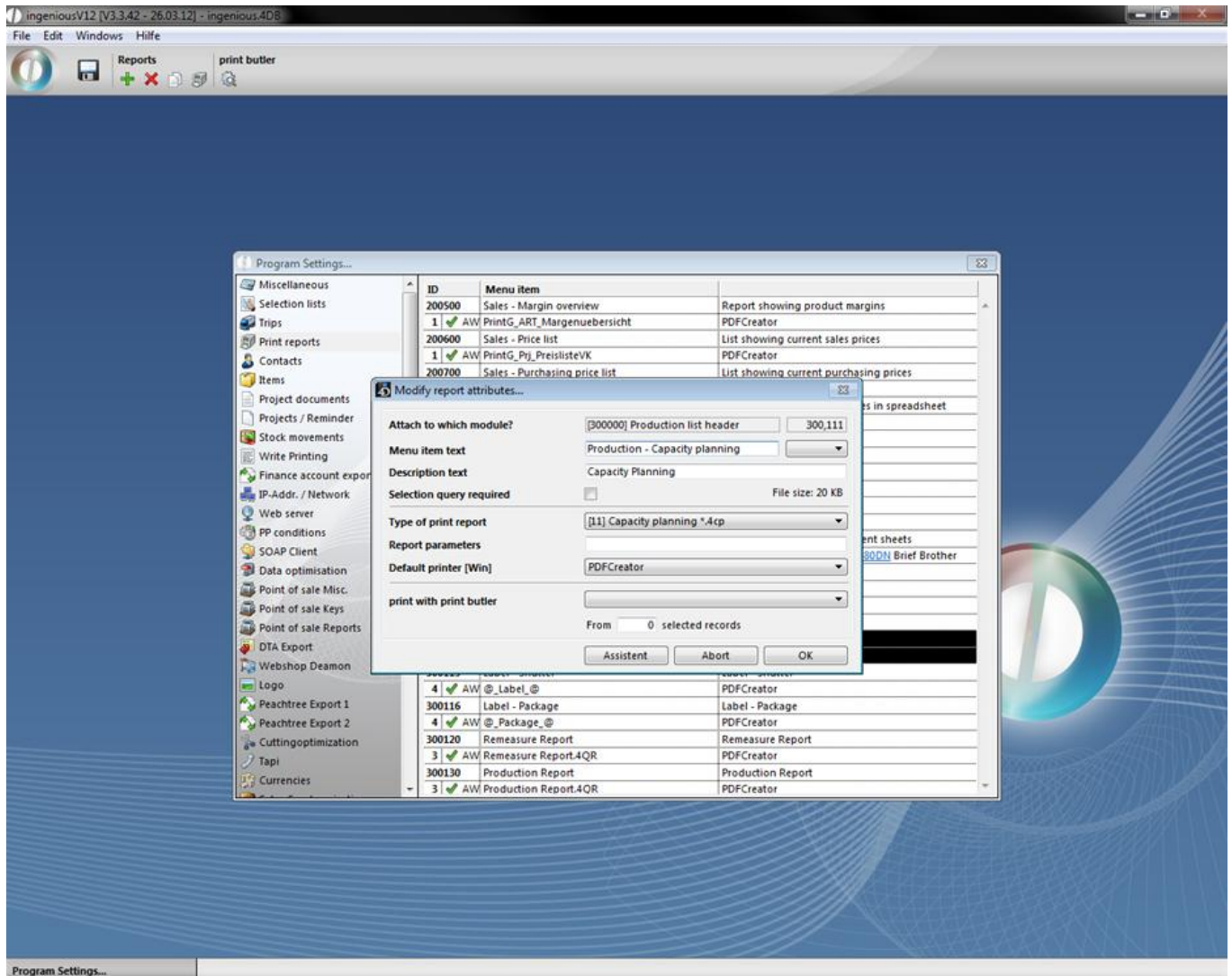
Show project totals

2 Projects [2 / 45 / 48]

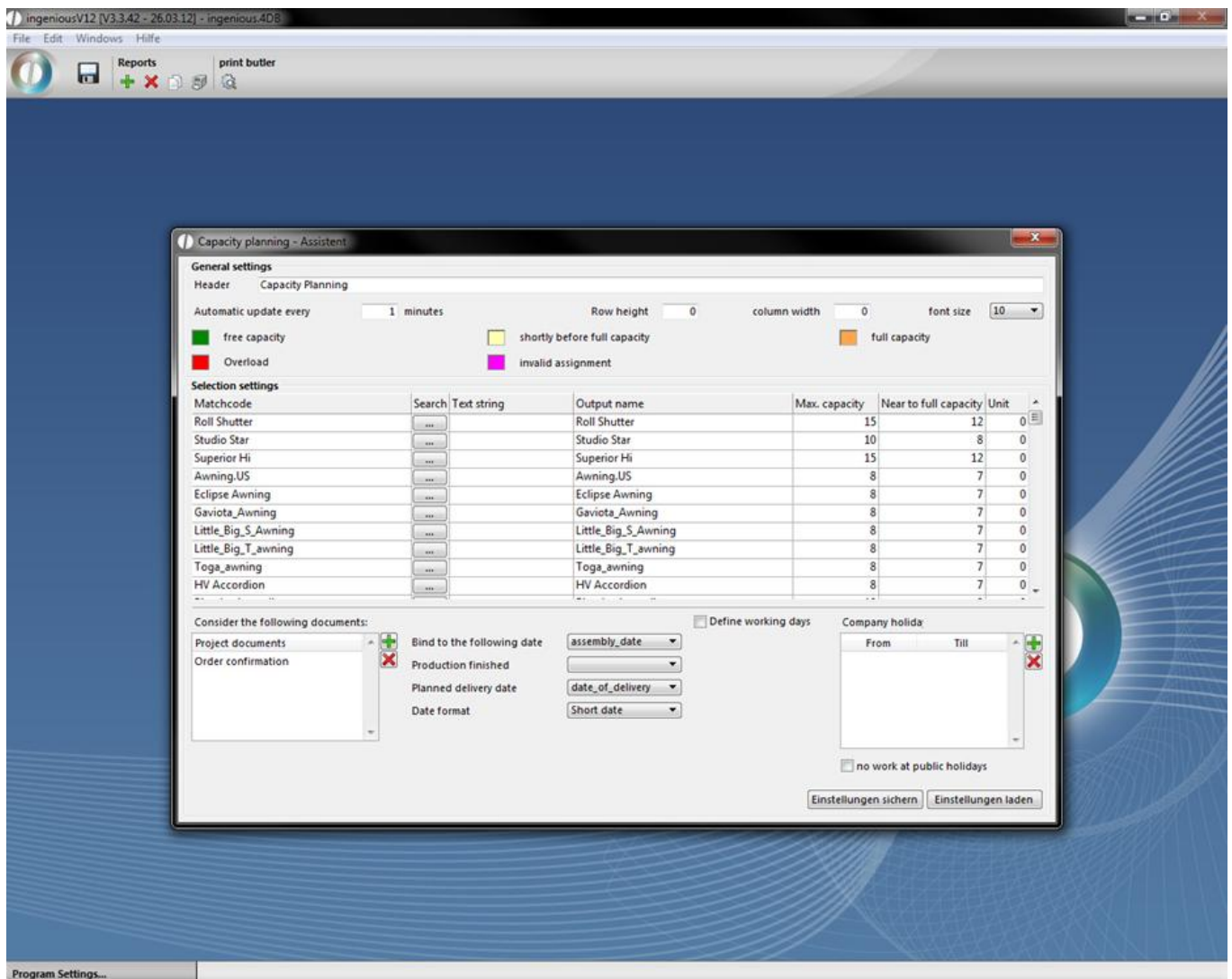
Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					


Capacity planning

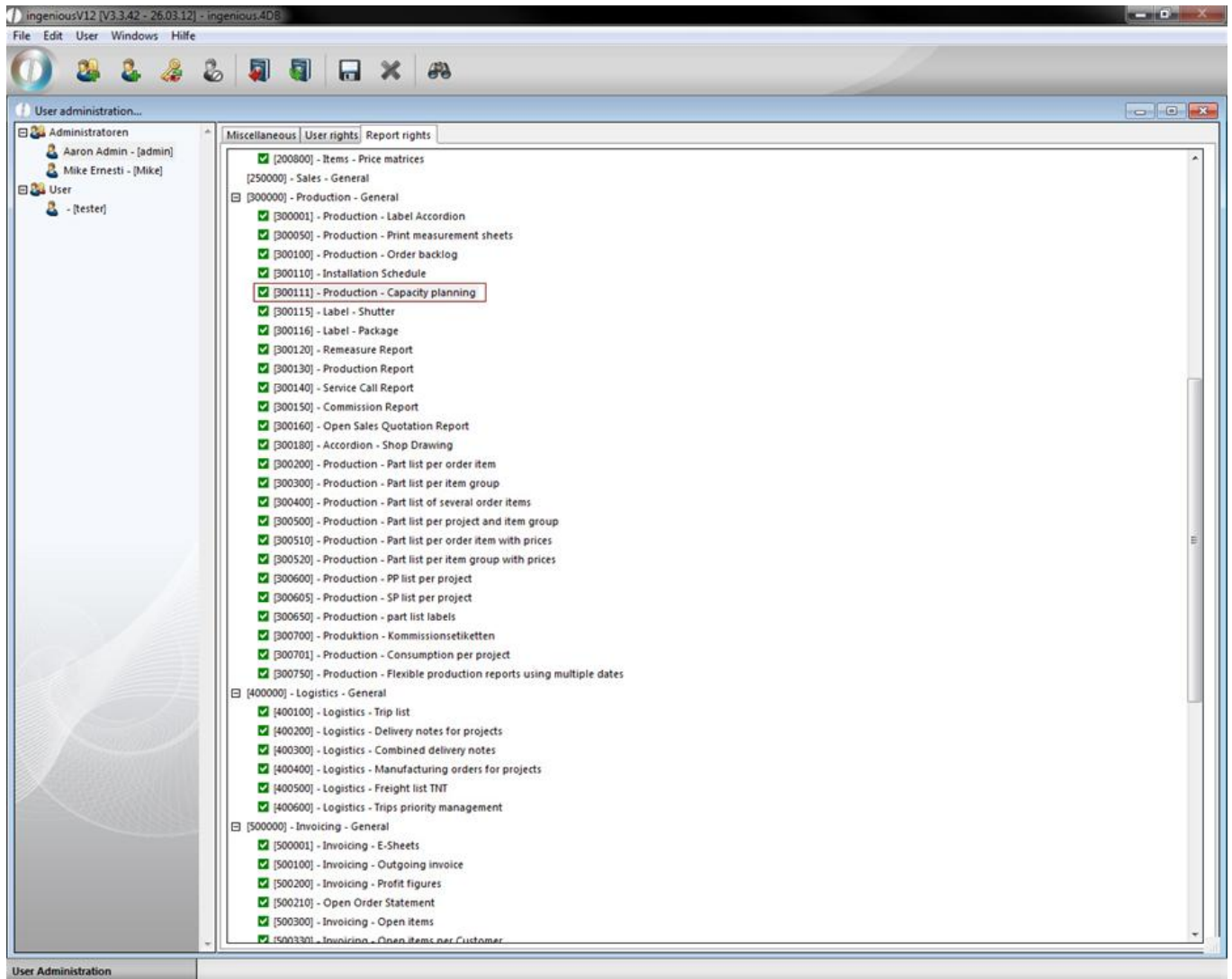
The capacity planning finds an application in production companies. With the help of this function, the companies can coordinate production and marketing of their parts list. To be able to use the capacity planning function, a new print report must be created. Attach this report to the module "[300000] Production list header" and fill in the remaining fields as illustrated.



Then click on the "Assistant" button. A new window opens in which you enter the diverse parts list items that need to be considered in capacity planning. In order to do that, simply click on the button and the item catalog opens, in which you select the designated items by double-clicking. In the "Max. Capacity" column, enter the value of the number of items that are to be produced daily. In the column "Before capacity utilization" enter the value for the item quantities that indicates that the maximum production has almost been reached. In the column "Unit" enter the price of the item (0 = piece, 1 = m, 2 = square meter). The capacity planning report will be attached to a certain project document, preferably to the order confirmation or to the delivery receipt) and to a precise date. In the area "General settings" you can also determine the headline and font size of the print report. Records with appointment connection, „Production finished“ (= real date of production; project is no longer displayed at cutting optimization) and "Planned delivery date" (= If the delivery date is exceeded by moving the project in the cutting optimization, an alert will be displayed).



When you have made all of the desired settings, close the assistant and the program settings with . Don't forget to save the settings first. In order to use the capacity planning to the fullest, the respective report right must be activated in the user administration.



When you create a project, make sure that you determine the selected attached dates. Without these settings, the items will not be considered by the capacity planning. For the example shown as well as a better understanding, two order confirmations will be created that have the same dates.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

cap*
Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04192012/00069]

Item	Items	ArtNo.	Name	Quantity				Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	Little_Big_S_Awn PL_AW_BS		Retractable awning type "little big s"	20.00	12.000			2,491.55	2,491.55	49,831.00	0.00	49,831.00	24,666.
002	Little_Big_S_Awn PL_AW_BS		Retractable awning type "little big s"	13.00	12.000			2,720.27	2,720.27	35,363.51	0.00	35,363.51	17,504.
003	Little_Big_T_Awn PL_AW_BT		Retractable awning type "little big t"	5.00	12.000			2,896.35	2,896.35	14,481.75	0.00	14,481.75	7,168.
004	Zip Tex PL_SC_ZI		ZipTex. (Mermet-Vienne.).	13.00	12.000	12.000		1,021.18	1,021.18	13,275.30	0.00	13,275.30	3,866.
005	Roll Shutter PL_SH_RS		Roll Shutter. (Barracuda, non-vented - white)	5.00	12.000	12.000		810.30	810.30	4,051.49	0.00	4,051.49	734.
006	Studio Star PL_SH_SS		Studio Star (R - white) CrankCord	10.00	12.000	12.000		16.14	16.14	161.43	0.00	161.43	1,833.

PP [USD] 55,774.24 Before CM = 59633 USD 107% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 117,164.48 After CM = 59633 USD 107% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 117,164.48

Footer text

[Order confirmation 04192012/00069]

Sample view of the first order confirmation

The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42 - 26.03.12' and the database 'ingenious.4DB'. The menu bar includes 'File', 'Edit', 'Projects', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains icons for various functions, including a search icon and a filter icon. The main window is titled 'Projects detail view [Ingenious] - [Order confirmation 04192012/00069]'. On the left, a sidebar lists navigation options: 'Miscellaneous', 'Items', 'Payments', 'Times', 'Parameter', 'Inventory postings', 'Production state', 'Documents and Notes', 'own fields', 'File attachments', and 'Print preview'. The 'Times' table is the central focus, with columns for 'Date', 'Employee', 'From', 'Till', 'Job classification', and 'Description'. Below the table, there are fields for 'Calculated time' (00:00 hrs) and 'Actual time' (00:00 hrs), along with a 'Use date' dropdown set to 'Assembly d...' and a 'Main technician' field. The 'Delivery times' section shows 'Time from' (00:00:00), 'Till' (00:00:00), and 'Duration' (00:00:00). The 'Planning' section includes a grid of date fields: 'Promise Date' (00/00/00), 'Manufacturing' (04/19/2012), 'Date 2' (00/00/00), 'Assembly' (04/19/2012), 'Date 3' (00/00/00), 'Delivery' (04/20/2012), 'In Production' (00/00/00), 'Date 5' (00/00/00), 'Date 6' (00/00/00), 'Date 7' (00/00/00), 'Date 8' (00/00/00), and 'Date 9' (00/00/00). Each date field has a small red icon next to it. The status bar at the bottom shows '[Order confirmation 04192012/00069]'.

Fixed dates

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

cap*
Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04192012/00070]

Item	Items	ArtNo.	Name	Quantity				Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	Little_Big_S_Awn PL_AW_BS		Retractable awning type "little big s"	10.00	12.000			2,491.55	2,491.55	24,915.50	0.00	24,915.50	12,333.
002	Little_Big_S_Awn PL_AW_BS		Retractable awning type "little big s"	3.00	12.000			2,720.27	2,720.27	8,160.81	0.00	8,160.81	4,039.
003	Little_Big_T_Awn PL_AW_BT		Retractable awning type "little big t"	2.00	12.000			2,896.35	2,896.35	5,792.70	0.00	5,792.70	2,867.
004	Zip Tex PL_SC_ZI		ZipTex. (Mermet-Vienne.).	2.00	12.000	12.000		1,021.18	1,021.18	2,042.35	0.00	2,042.35	596.
005	Roll Shutter PL_SH_RS		Roll Shutter. (Barracuda, non-vented - white)	5.00	12.000	12.000		810.30	810.30	4,051.49	0.00	4,051.49	734.
006	Studio Star PL_SH_SS		Studio Star (R - white) CrankCord	5.00	12.000	12.000		16.14	16.14	80.68	0.00	80.68	917.

PP [USD] 21,488.70 Before CM = 22879 USD 106% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

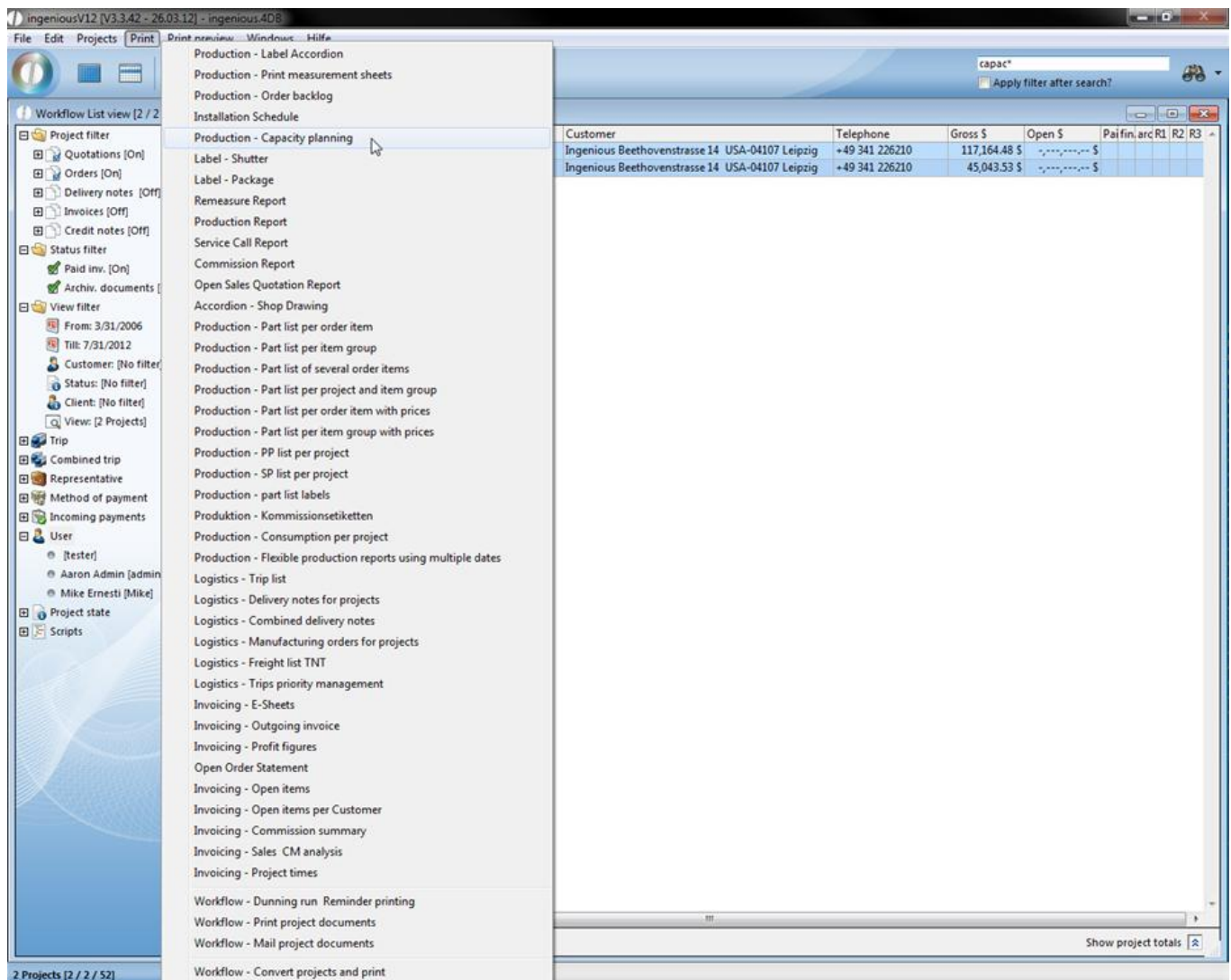
Net [USD] 45,043.53 After CM = 22879 USD 106% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 45,043.53

Footer text

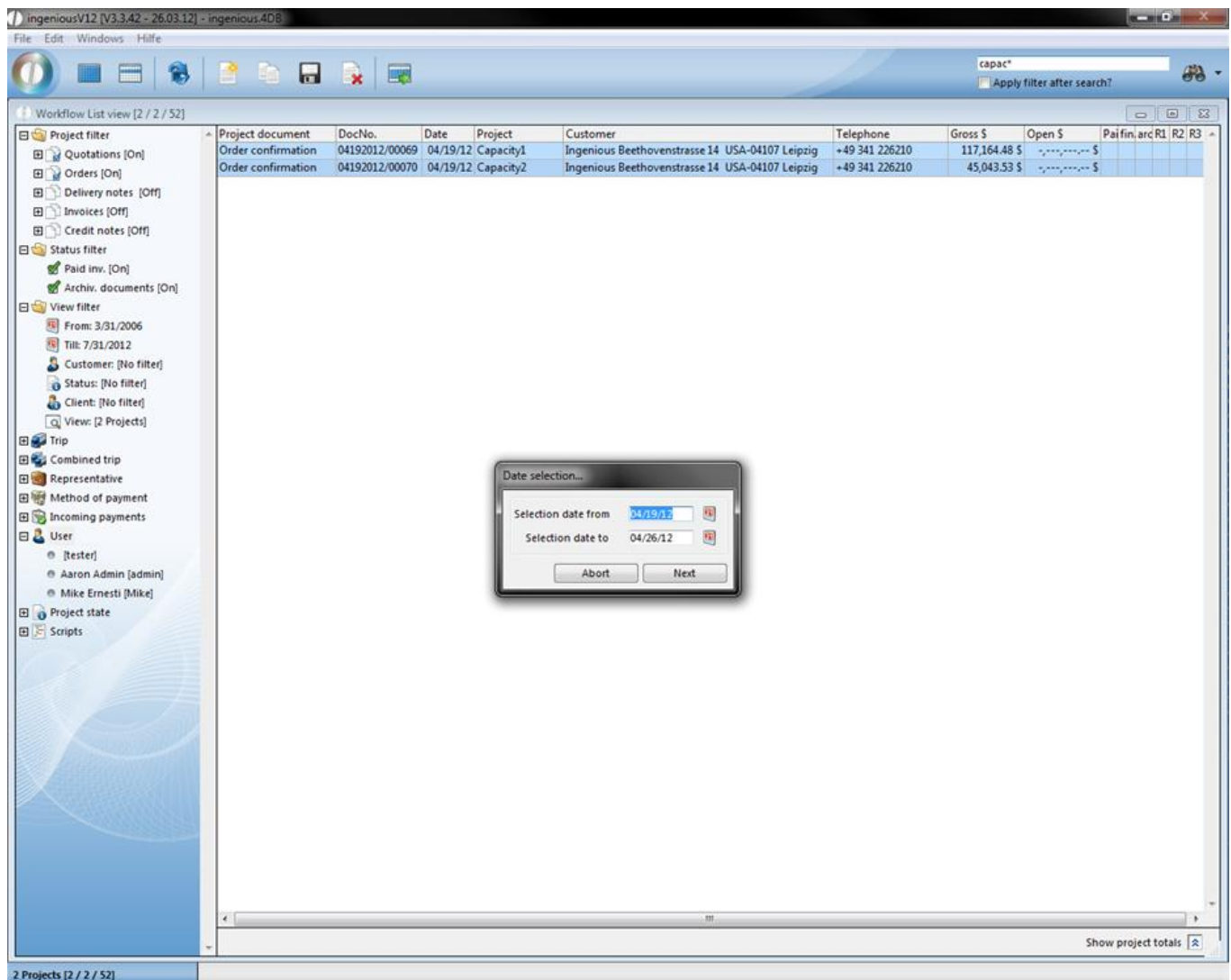
[Order confirmation 04192012/00070]

Sample view of the second order confirmation

When opening one of the workflow modules, you can access the print report created by you in the "Print" menu.



The window for date selection opens in which you can determine the relevant period in which the capacity planning should be shown.



Now you see the capacity distribution. By means of the color marking, you can identify the full capacity of the items (green = free capacity, yellow = prior to full loading, orange = full load, red = overload). Products, for which the production was not finished at departed appointments, are display red at cutting optimization.

Capacity planning

File Edit View Insert Style Tools Database

100

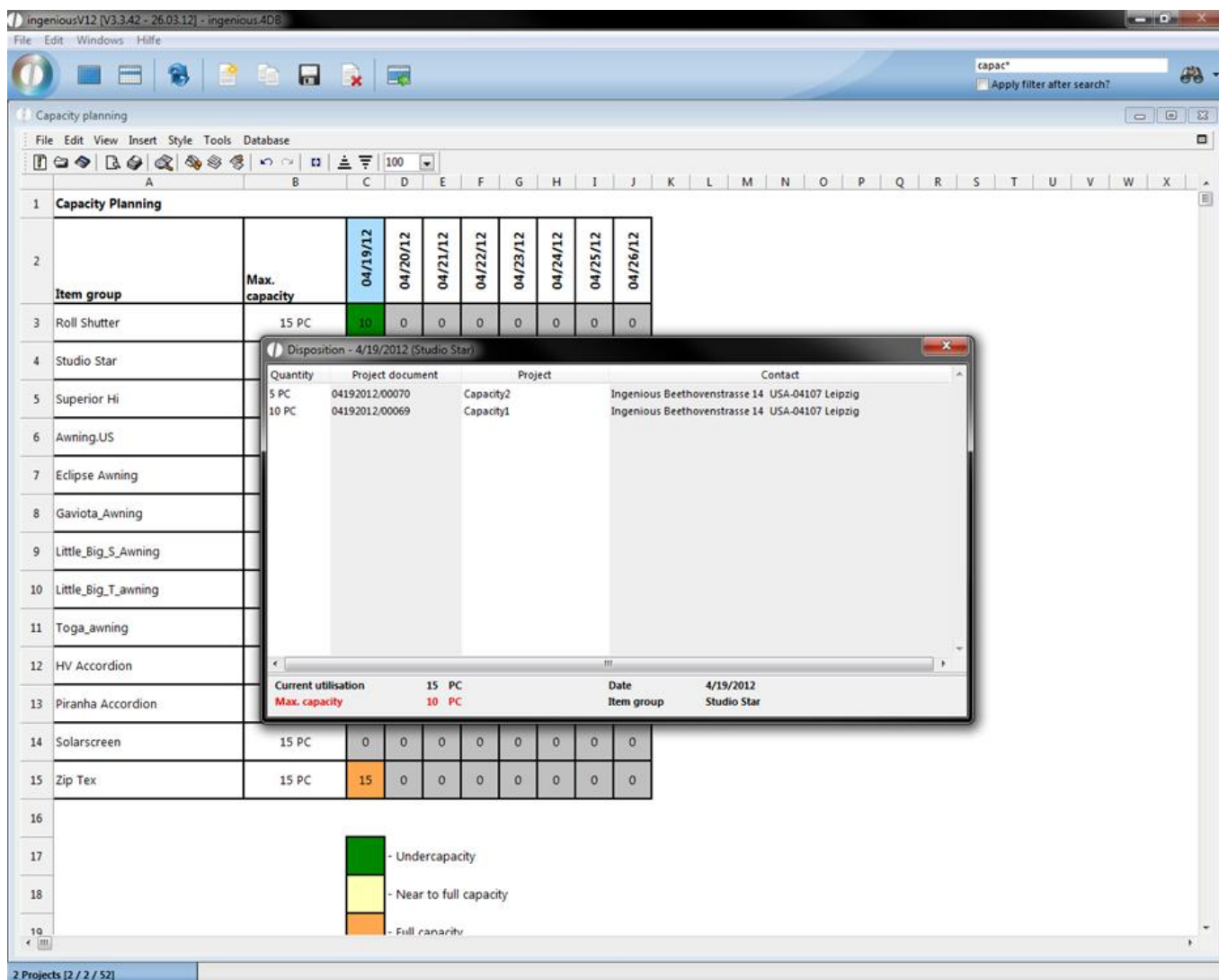
Capacity Planning

			04/19/12	04/20/12	04/21/12	04/22/12	04/23/12	04/24/12	04/25/12	04/26/12
2		Max. capacity								
3	Roll Shutter	15 PC	10	0	0	0	0	0	0	0
4	Studio Star	10 PC	10	0	0	0	0	0	0	0
5	Superior Hi	15 PC	0	0	0	0	0	0	0	0
6	Awning.US	8 PC	0	0	0	0	0	0	0	0
7	Eclipse Awning	8 PC	0	0	0	0	0	0	0	0
8	Gaviota_Awning	8 PC	0	0	0	0	0	0	0	0
9	Little_Big_S_Awning	8 PC	46	0	0	0	0	0	0	0
10	Little_Big_T_awning	8 PC	7	0	0	0	0	0	0	0
11	Toga_awning	8 PC	0	0	0	0	0	0	0	0
12	HV Accordion	8 PC	0	0	0	0	0	0	0	0
13	Piranha Accordion	10 PC	0	0	0	0	0	0	0	0
14	Solarscreen	15 PC	0	0	0	0	0	0	0	0
15	Zip Tex	15 PC	15	0	0	0	0	0	0	0
16										
17										
18										
19										

- Undercapacity
 - Near to full capacity
 - Full capacity

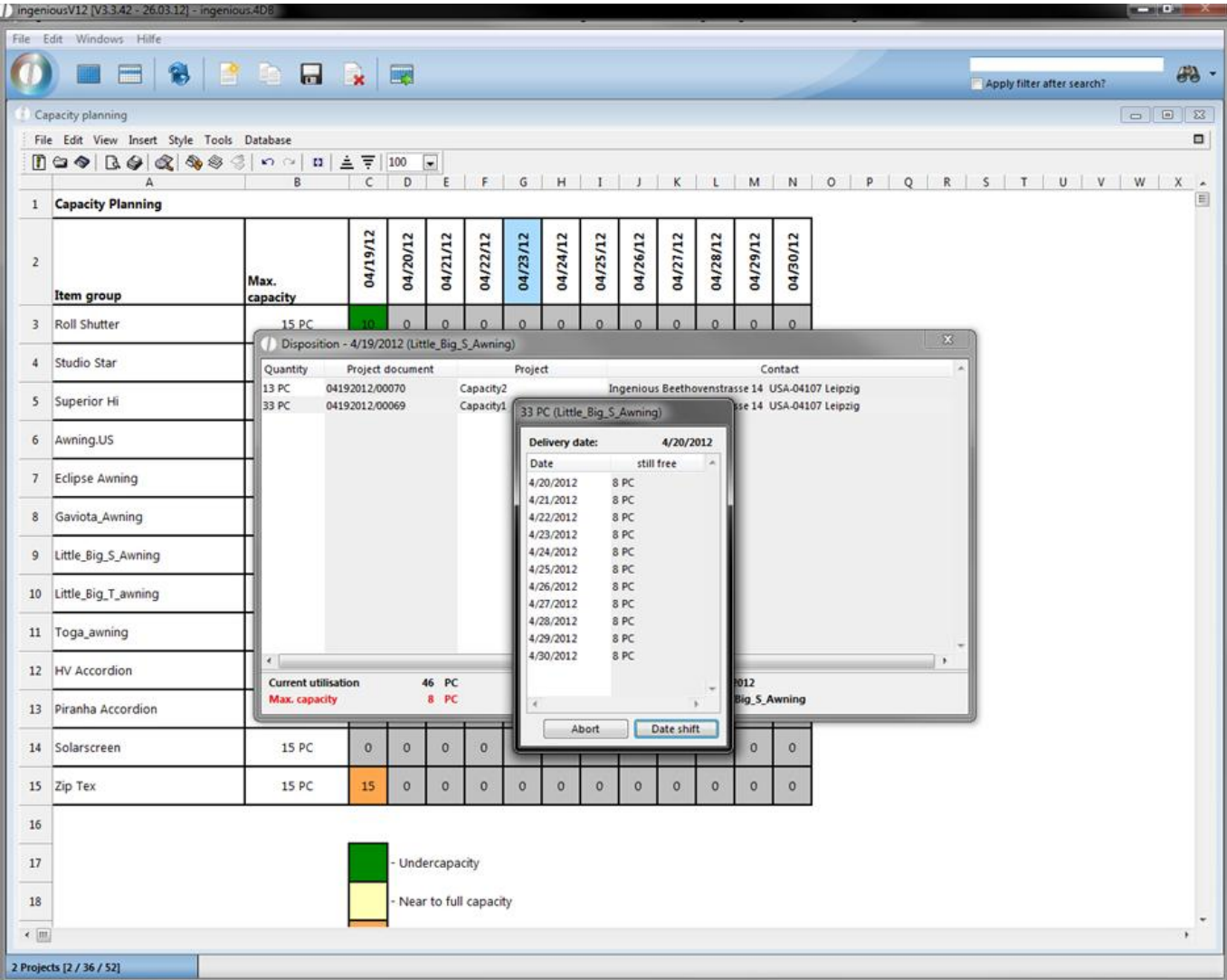
2 Projects [2 / 2 / 52]

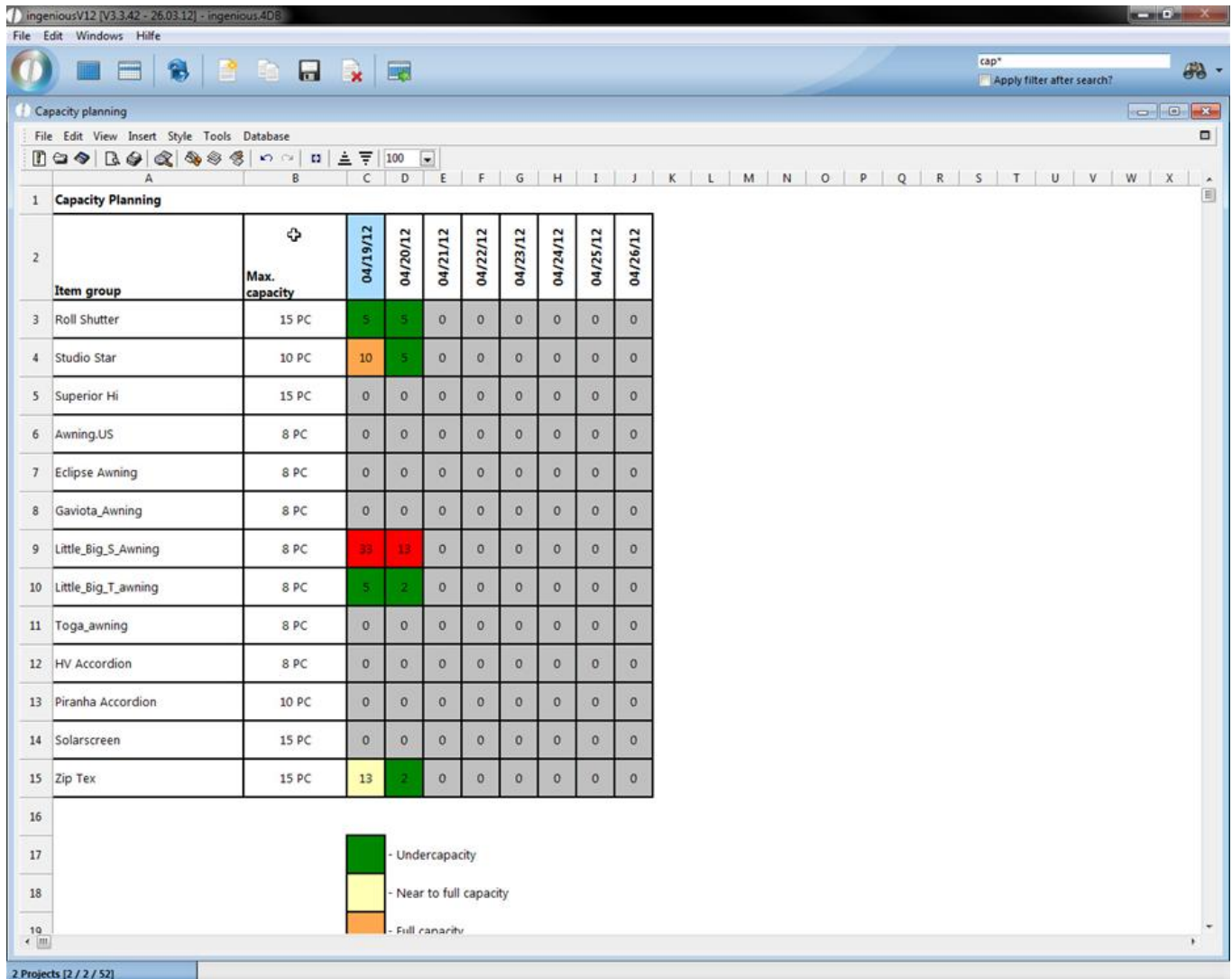
By double-clicking on the individual fields, the relevant arrangement will be indicated which contain product quantity, project number and contact data. In the lower part, you see the item group, the date and the actual and maximum possible loading capacity. In the example illustrated, the actual capacity is greater than the maximum capacity.



At this point one can double click on one of the contacts to open another window that displays the remaining days inclusive of their capacity load. By selecting one of the days and clicking on the "Date shift" button, the settings of all item positions of a project will be moved to this day and the display of the capacity division changed. Modification of the production date will be automatically entered in the relevant project.

Note: The shift affects all the item items of a project. The shifting of individual items is only possible if they are assigned to a different project (Delivery notice / Order confirmation).



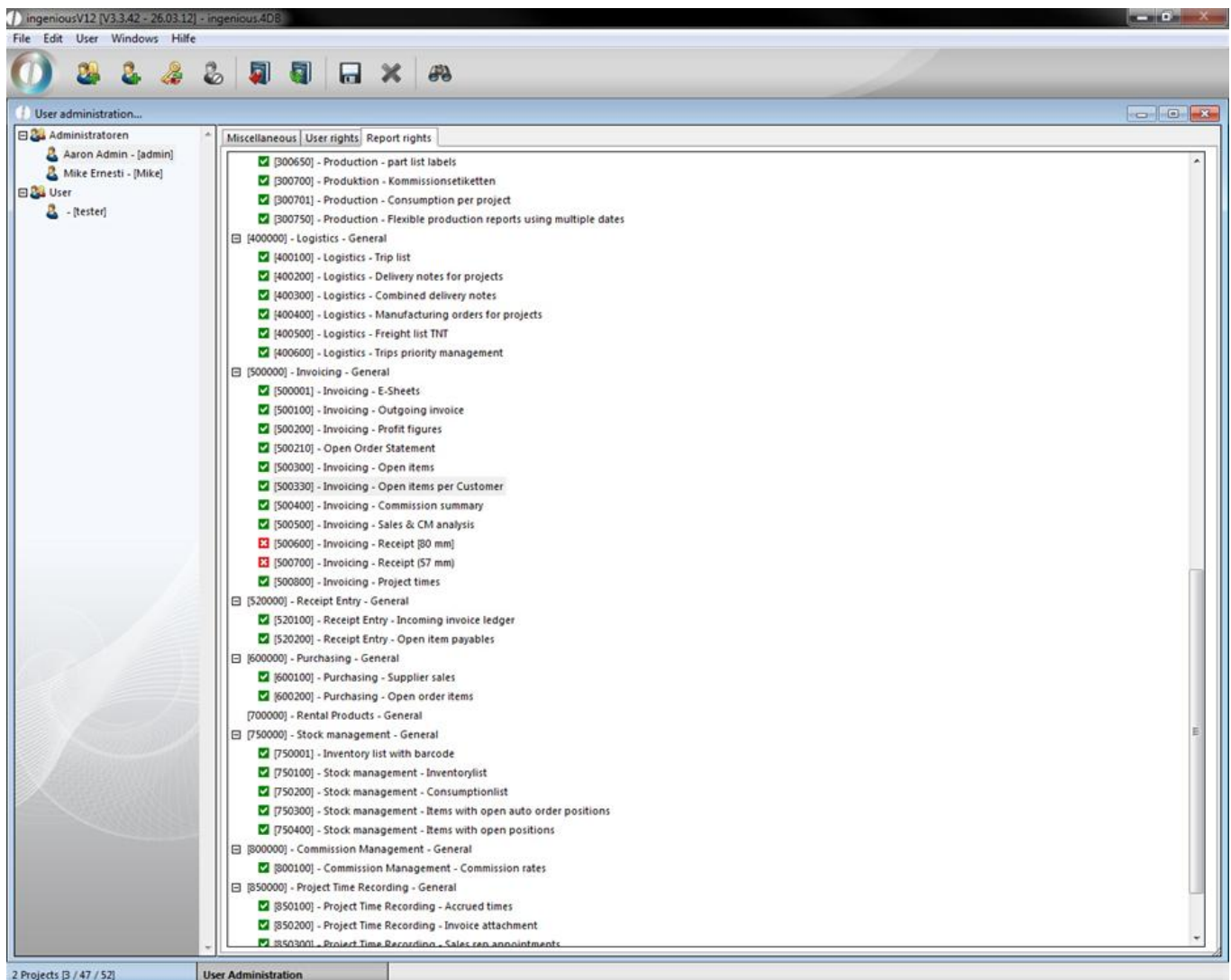


View of the capacity distribution after the date shift

Optionally, the maximum available capacities can also be calculated on a daily basis using the actual resources available. Details can be found in the chapter **Extended capacity planning (Section 11.3.1.4)**.

Print report "Invoicing – Open items per contact"

In ingenious.V12 the print report "Invoicing – Open items per contact" was created. To use it, the corresponding report right has to be activated.



Now you can open the print report in the workflow modules in the menu "Print".

The screenshot displays the ingenious.V12 software interface. On the left, a sidebar contains a 'Workflow List view' with various filters and a 'Print' menu. The 'Print' menu is open, showing a list of options including 'Production - Label Accordion', 'Production - Print measurement sheets', 'Production - Order backlog', 'Installation Schedule', 'Production - Capacity planning', 'Label - Shutter', 'Label - Package', 'Remeasure Report', 'Production Report', 'Service Call Report', 'Commission Report', 'Open Sales Quotation Report', 'Accordion - Shop Drawing', 'Production - Part list per order item', 'Production - Part list per item group', 'Production - Part list per project and item group', 'Production - Part list per order item with prices', 'Production - Part list per item group with prices', 'Production - PP list per project', 'Production - SP list per project', 'Production - part list labels', 'Produktion - Kommissionsetiketten', 'Production - Consumption per project', 'Production - Flexible production reports using multiple dates', 'Logistics - Trip list', 'Logistics - Delivery notes for projects', 'Logistics - Combined delivery notes', 'Logistics - Manufacturing orders for projects', 'Logistics - Freight list TNT', 'Logistics - Trips priority management', 'Invoicing - E-Sheets', 'Invoicing - Outgoing invoice', 'Invoicing - Profit figures', 'Open Order Statement', 'Invoicing - Open items', 'Invoicing - Open items per Customer', 'Invoicing - Commission summary', 'Invoicing - Sales CM analysis', 'Invoicing - Project times', 'Workflow - Dunning run Reminder printing', 'Workflow - Print project documents', 'Workflow - Mail project documents', and 'Workflow - Convert projects and print'.

On the right, a data table is visible with columns: Customer, Telephone, Gross \$, Open \$, Paifin, arc R1, R2, R3. The table contains several rows of data, including customer names and addresses, and their corresponding financial values.

Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

The printing dialog will open up, where you can change the settings. In the print preview you can see a list of all open items and credit notes, sorted by contact.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.40B

Hilfe

PDF print preview: Invoicing - Open items per Customer

Invoicing - Open items per Customer

printout

1 / 1 79.8% Werkzeuge Kommentar

► Outgoing invoices - OI list

As at 4/23/2012

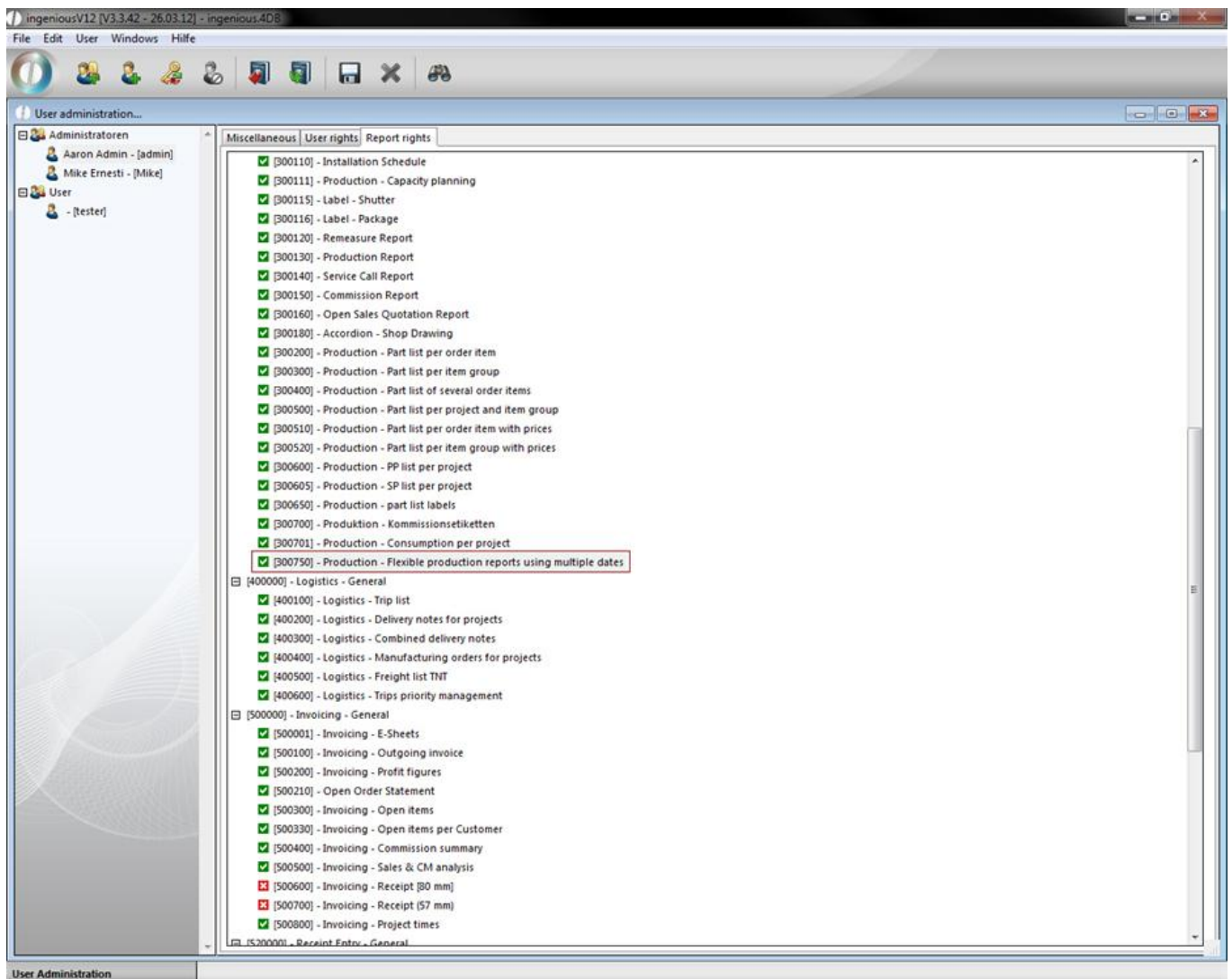
KdNr.	Customer	Document no.	Printed on	Due to	Days	Stage	Net sum	VAT	VAT rate	Invoice amount	Paid	Open	Open %
5527	Best Beer Garden in Town	Mr Antonio	103082012/00032/8/2012	4/7/2012			0.00 \$	0%		50,000.00 \$	0.00 €	50,000.00 \$	100.0 %
			103232012/00038/23/2012	4/22/2012			0.00 \$	0%		783.20 \$	0.00 €	783.20 \$	100.0 %
			104162012/00042/19/2012	5/19/2012			0.00 \$	0%		2,862.00 \$	0.00 €	2,862.00 \$	100.0 %
	Tel.: +1 123 456789	Fax: +1 123 456780				Cust. since	00/00/00						10.0 %
5528	Mrs Sunshine		104162012/0004 W/19/2012	5/19/2012			0.00 \$	0%		837.56 \$	0.00 €	837.56 \$	100.0 %
	Tel.: +1 123 456789	Fax: +1 123 456780				Cust. since	00/00/00						10.0 %
5529	Ingenious		103082012/00038/8/2012	4/7/2012			0.00 \$	0%		40,000.00 \$	0.00 €	40,000.00 \$	100.0 %
	Tel.: +49 341 226210	Fax: +49 341 2262120				Cust. since	00/00/00						10.0 %
5531	Frank Everybody		103082012/00038/8/2012	4/7/2012			0.00 \$	0%		10,000.00 \$	0.00 €	10,000.00 \$	100.0 %
	Tel.: +1 789 4561230	Fax: +1 789 4561230				Cust. since	00/00/00						10.0 %
5532	Tom Customer		103082012/00038/8/2012	4/7/2012			0.00 \$	0%		5,000.00 \$	0.00 €	5,000.00 \$	100.0 %
	Tel.: +1 4567890 123	Fax: +1 4567890 123				Cust. since	00/00/00						10.0 %
5533	The Aaming Store		103082012/00038/8/2012	4/7/2012			0.00 \$	0%		10,000.00 \$	0.00 €	10,000.00 \$	100.0 %
	Tel.: +1 123456789	Fax: +1 123456789				Cust. since	00/00/00						10.0 %
5535	Chicagos 1st Shutters Outlet		103082012/00038/8/2012	4/7/2012			0.00 \$	0%		5,000.00 \$	0.00 €	5,000.00 \$	100.0 %
	Tel.: +1 4455667788	Fax: +1 4455667788				Cust. since	00/00/00						10.0 %
5556	White Productions		104022012/00049/2/2012	5/2/2012			0.00 \$	0%		586,237.84 \$	0.00 €	586,237.84 \$	100.0 %
	Tel.: 312/1234567	Fax: 312/1234568				Cust. since	4/2/2012						10.0 %
							710,500.00 \$	0.00 \$		710,500.00 \$	0.00 \$		
											Open total	710,500.00 \$	100.0 %

Report created with ingenious.net © Ingenious GmbH 2012 - 1 - 4/23/2012

2 Projects [1 / 11 / 52] User Administration PDF Druckvorschau

The generic print report module

The generic print report module is a flexible analyze module to print out reports on the basis of the selection of different project date entries. To use this module you have to activate the corresponding report right.



Now you can find the new print report “Production – Flexible production reports using multiple dates” in the workflow modules in the print menu.

The screenshot displays the ingenious.V12 software interface. On the left, a menu titled 'Workflow List view [1 / 1]' is expanded, showing various project-related options. The main area on the right contains a table with customer data.

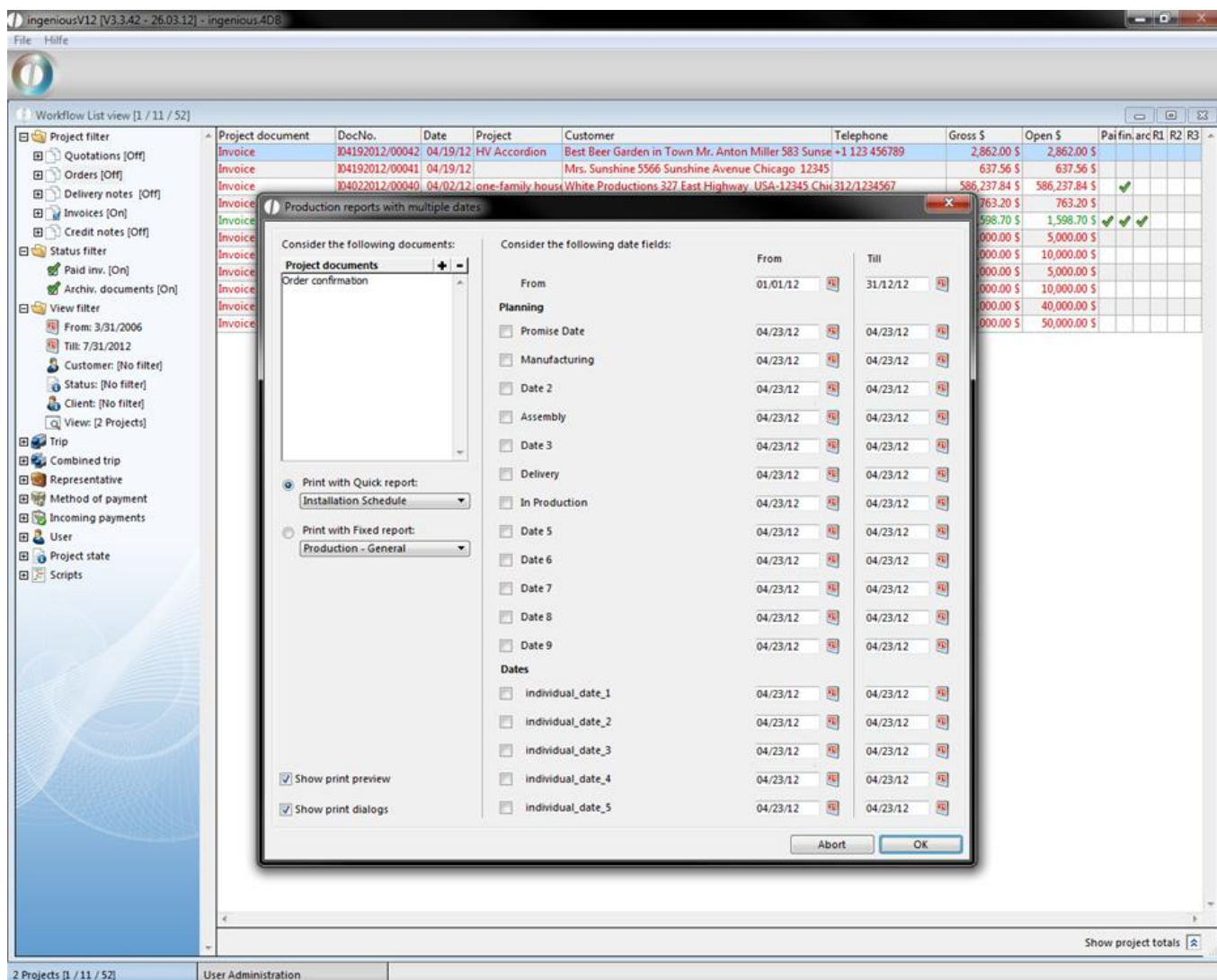
Menu Options (Left):


- Production - Label Accordion
- Production - Print measurement sheets
- Production - Order backlog
- Installation Schedule
- Production - Capacity planning
- Label - Shutter
- Label - Package
- Remeasure Report
- Production Report
- Service Call Report
- Commission Report
- Open Sales Quotation Report
- Accordion - Shop Drawing
- Production - Part list per order item
- Production - Part list per item group
- Production - Part list of several order items
- Production - Part list per project and item group
- Production - Part list per order item with prices
- Production - Part list per item group with prices
- Production - PP list per project
- Production - SP list per project
- Production - part list labels
- Produktion - Kommissionsetiketten
- Production - Consumption per project
- Production - Flexible production reports using multiple dates
- Logistics - Trip list
- Logistics - Delivery notes for projects
- Logistics - Combined delivery notes
- Logistics - Manufacturing orders for projects
- Logistics - Freight list TNT
- Logistics - Trips priority management
- Invoicing - E-Sheets
- Invoicing - Outgoing invoice
- Invoicing - Profit figures
- Open Order Statement
- Invoicing - Open items
- Invoicing - Open items per Customer
- Invoicing - Commission summary
- Invoicing - Sales CM analysis
- Invoicing - Project times
- Workflow - Dunning run Reminder printing
- Workflow - Print project documents
- Workflow - Mail project documents
- Workflow - Convert projects and print

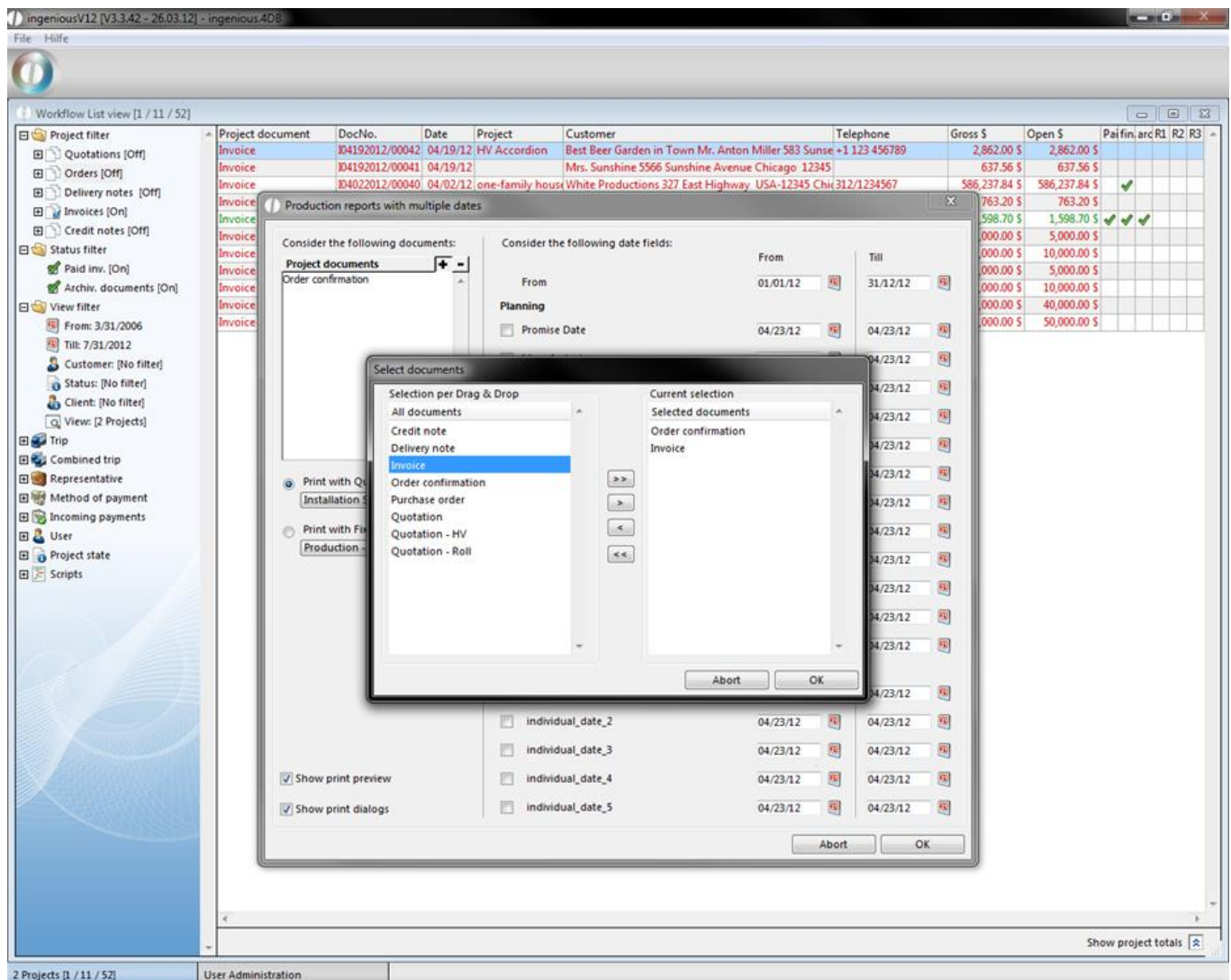
Data Table (Right):


Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

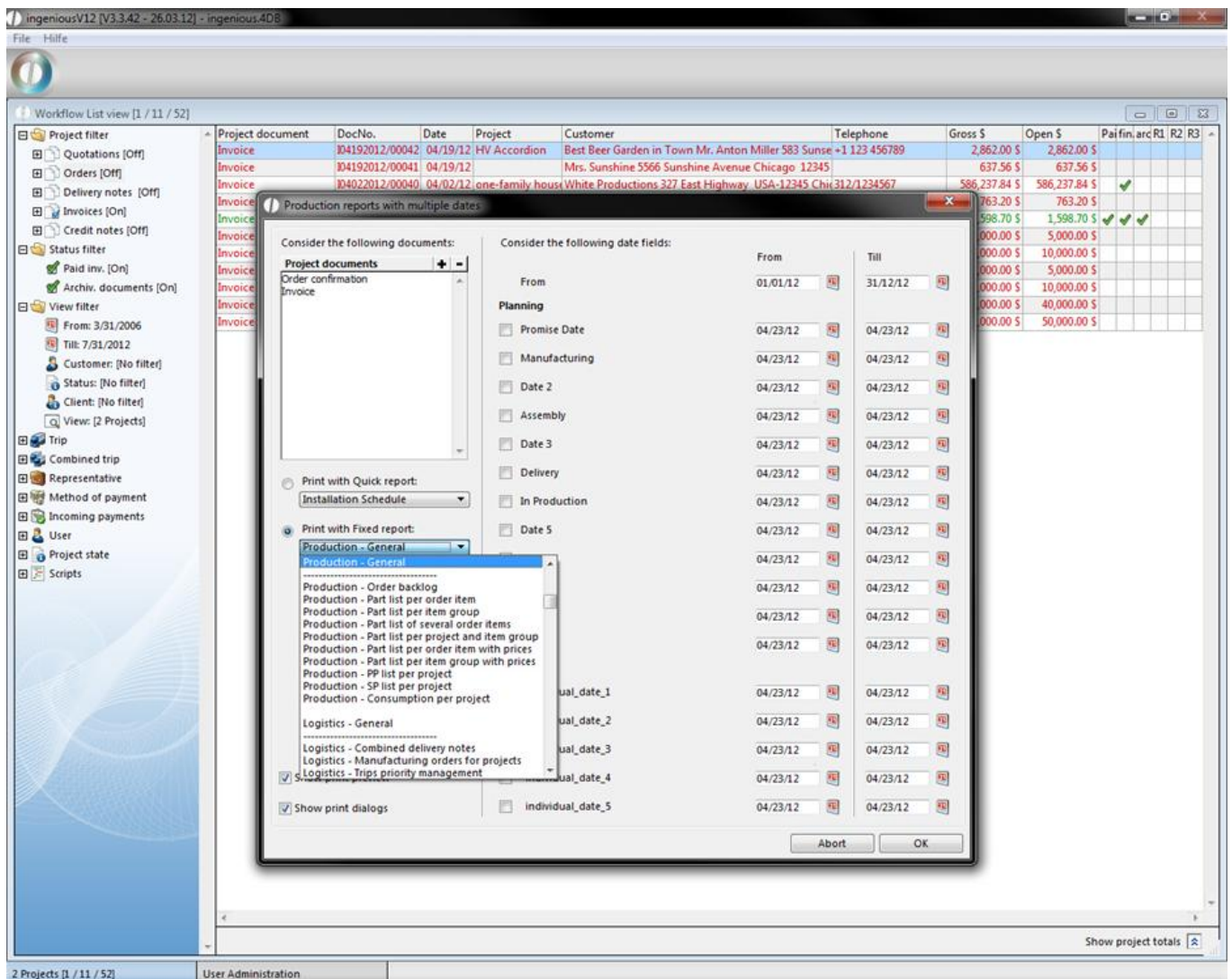
In the upper left area you can determine the project documents that will be involved in the score.



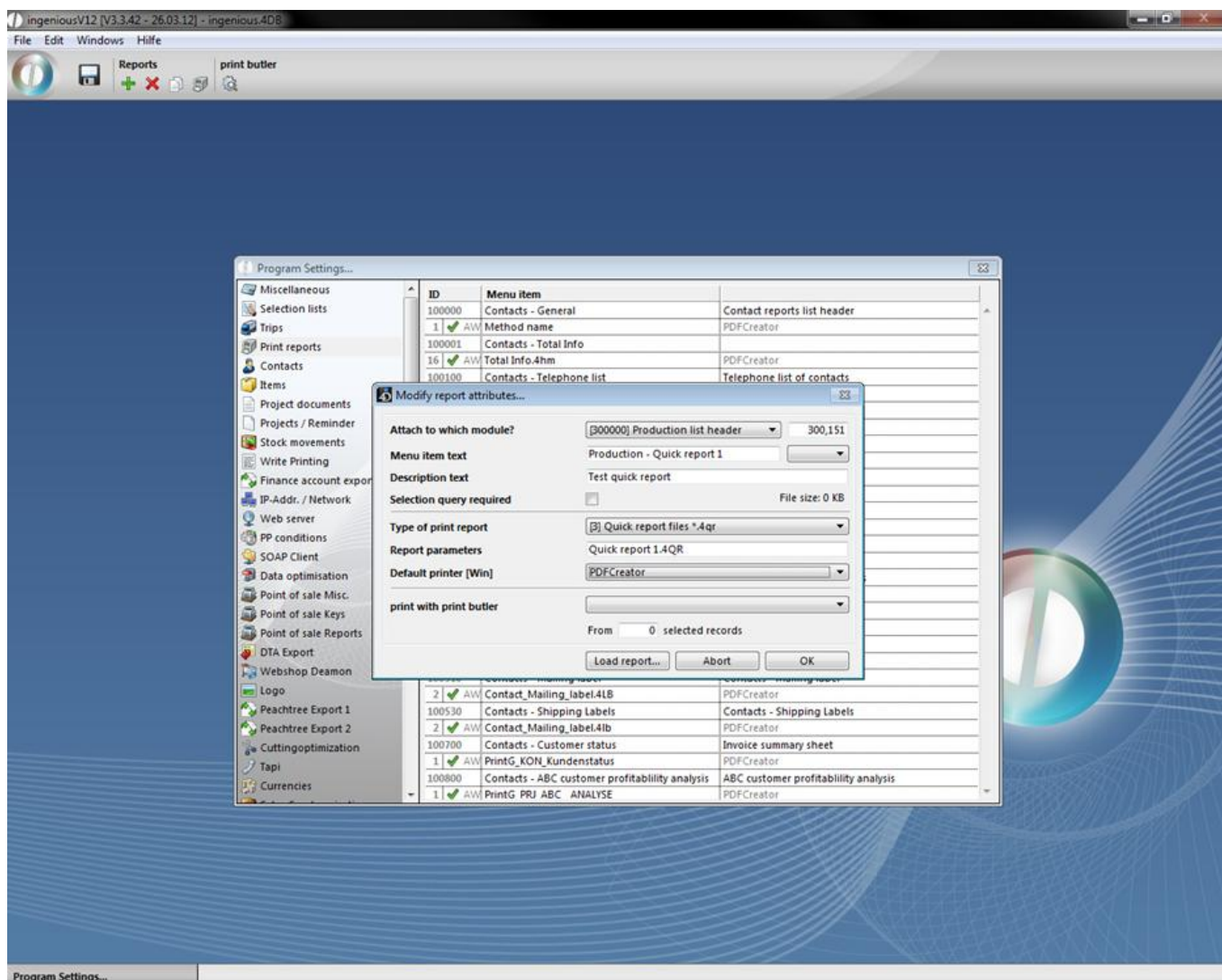
New project documents can be added by clicking the button . In the new window you can drag and drop the desired documents in the right area and accept it with "ok".



With the help of the button  you can delete project documents. The documents can be printed out on the basis of a quick report or a fixed report. In the fixed reports you can find all reports given by ingenious.V12.



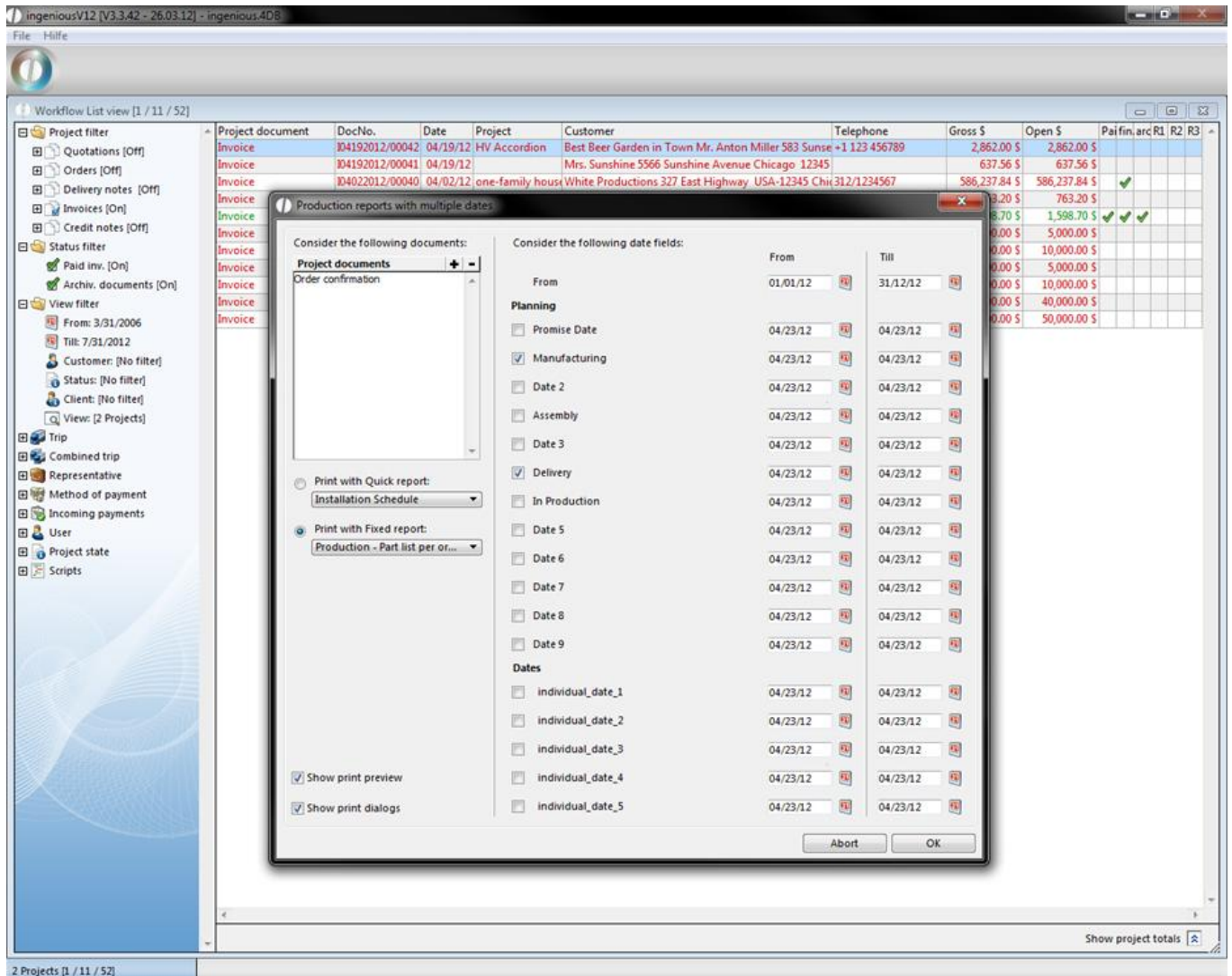
You can create quick reports with the help of the quick report editor and add them to the list of print reports in the program settings. Note, that the type of the print report has to be "Type 3 – Quick report files *.4qr" and the report has to be attached to the corresponding module.



To be able to use the quick report you have to unlock the corresponding report right. Now the created quick report is displayed in the drop down list.

In the right area you can determine the date span within the project documents should be considered. The decisive fact is the print date in the projects.

In the category "Planning" you can determine the date span of the considered project dates. Here the dates from the category "Times" will be included.



In the category "Dates" you can choose the date span for the individual dates that you can find in the projects in the category "own fields". The print selection is chosen by the intersection of all projects having date values in the chosen ranges.

3.3.3.3 Summarizing project documents

Different documents such as quotations, order confirmations and delivery notes can be summarized. This option can be an advantage if a contact has allowed several quotations to be provided, for example, and if they have made one contract out of them in the end. In order to be able to summarize the projects, you must highlight the desired documents and then click in the "Projects" menu on the item "Summarize project documents".

The screenshot displays the ingenious.V12 software interface. On the left, a menu is open under the 'Projects' tab, showing options such as 'Create project document', 'Convert project document', 'Combine project documents', 'Delete project document', 'Create part payment invoice', 'Create closing invoice', 'Create combined invoice', 'Create mass payment', 'Show entire project', 'DTA Debit Export', 'Administer combined trips', 'Manage list views', and 'Free summary'. Below the menu, there are filters for 'Status: [No filter]', 'Client: [No filter]', and 'View: [2 Projects]'. The main window shows a table with columns: DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. The table contains various project entries, including invoices, quotations, and order confirmations, with associated dates and amounts.

DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 1112223333	18,134.40 \$						
03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 1112223333	10,062.28 \$						
03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					
03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$						

In the displayed window you can choose the project type of the combined project. Additionally you have got the opportunity to choose the print template. Also you can determine, whether a subheader and/or subtotal should be added or not. And you can choose what should happen to the originally projects.

The screenshot displays the ingenious.V12 software interface. The main window shows a 'Workflow List view' with a table of project documents. The table has columns for Document Type, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and various status indicators. A 'Combine projects' dialog box is open, showing a 'From' list with two items (03152012/00033 and 03232012/00037) and a 'To' list with one item (03232012/00037). The dialog also includes options for 'New document' (Invoice), 'Print template' (Invoice), and 'Old documents' (Retain unchanged, Retain and archive, Don't retain).

Document Type	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation - Invoice						3,738.00 \$						
						1,598.70 \$	1,598.70 \$					
						13,105.53 \$						
						0.00 \$						
						1,526.40 \$						
						0.00 \$						
						1,198.80 \$						
						0.00 \$						
						55.00 \$						
						763.20 \$						
						88,560.00 \$						
						11,246.40 \$						
						18,660.80 \$						
						18,134.40 \$						
						10,062.28 \$						
						12,932.00 \$						
						15,934.16 \$						
						7,116.91 \$						
						18,660.80 \$						
						16,076.00 \$						
						7,384.42 \$						
						9,264.00 \$						
						4,764.80 \$						
						637.56 \$						
						5,000.00 \$	5,000.00 \$					
						10,000.00 \$	10,000.00 \$					
						5,000.00 \$	5,000.00 \$					
						10,000.00 \$	10,000.00 \$					
						40,000.00 \$	40,000.00 \$					
						50,000.00 \$	50,000.00 \$					
						2,263.74 \$						

The combined project can look like this.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Mrs Sunshine] - [Invoice ID4232012/00043]

Apply filter after search?

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross	PP
Quotation 03152012/00033												
Headline H												
001	Piranha Accordion PL_AC_PI		Piranha: white [2 Stacks]	1.00	80.000	40.000	13.30	295.48	295.48	0.00	295.48	166.
002	HV Accordion PL_AC_HV		Accordion HV#3: - white [2 Stacks]	3.00	70.000	50.000	34.29	833.40	2,500.20	0.00	2,500.20	542.
Subtotal									2,795.68		2,795.68	709.
Rebate 15%									-419.35		-419.35	
Running sum									2,376.33		2,376.33	709.
003	HV Accordion PL_AC_HV		Accordion HV#3: - white [2 Stacks]	3.00	70.000	80.000	30.24	1,176.00	3,528.00	0.00	3,528.00	753.
004	HV Accordion PL_AC_HV		Accordion HV#3: - white [2 Stacks]	2.00	85.000	60.000	28.73	1,017.60	2,035.20	0.00	2,035.20	463.
005	HV Accordion PL_AC_HV		Accordion HV#3: - white [2 Stacks]	5.00	70.000	70.000	30.36	1,033.20	5,166.00	0.00	5,166.00	1,128.
Subtotal									10,729.20		10,729.20	2,346.
Quotation 03232012/00037												
001	HV Accordion PL_AC_HV		Accordion HV#3: - white [2 Stacks]	1.00	56.000	56.000	35.04	763.20	763.20	0.00	763.20	155.
Subtotal									763.20		763.20	155.
PP [USD] 3,210.72 Before CM = 10450 USD 325% Calculated time 00:00 <input checked="" type="checkbox"/> Deducted discount VAT 0% 0.00 Gross [USD] Net [USD] 13,868.73 After CM = 10450 USD 325% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 13,868.73												
Footer text												

[Invoice ID4232012/00043]

3.3.3.4 Creating partial payment invoices

In the building industry, it is common to provide partial payment invoices for jobs that are partially finished. This function is integrated in Ingenious.V12 in the menu item "Projects/Create partial payment invoice". In the window that appears, you can provide a reduced value or a percentage according to your agreement with the contact.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious4DB

File Edit Projects Print Print preview Windows Hilfe

Workf...
 Proj...
 Stat...
 View...
 T...
 C...
 Status: [No filter]
 Client: [No filter]
 View: [2 Projects]
 Trip
 Combined trip
 Representative
 Method of payment
 Incoming payments
 User
 Project state
 Scripts

Create project document
 Convert project document
 Combine project documents
 Delete project document
 Create part payment invoice
 Create closing invoice
 Create combined invoice
 Create mass payment
 Show entire project
 DTA Debit Export
 Administer combined trips
 Manage list views
 Free summary

DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway CI	+1 4455667788	18,660.80 \$						
03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway CI	+1 4455667788	5,000.00 \$	5,000.00 \$					
03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

Show project totals

2 Projects [1 / 48 / 53]

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 48 / 54]

Project filter: Quotations [On], Orders [On], Delivery notes [Off], Invoices [On], Credit notes [Off], Status filter, Paid inv. [On], Archiv. documents [On], View filter, From: 3/31/2006, Till: 7/31/2012, Customer: [No filter], Status: [No filter], Client: [No filter], View: [2 Projects], Trip, Combined trip, Representative, Method of payment, Incoming payments, User, Project state, Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Order confirmation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation - Roll	03162012/Roll000	03/16/12				1,598.70 \$						
Quotation	03152012/00033	03/15/12				13,105.53 \$						
Quotation	03152012/00032	03/15/12				0.00 \$						
Quotation - HV	03142012/HV000	03/14/12				1,526.40 \$						
Quotation	03142012/00030	03/14/12				0.00 \$						
Quotation	03142012/00029	03/14/12				1,198.80 \$						
Quotation	03142012/00028	03/14/12				0.00 \$						
Quotation	03142012/00031	03/14/12				55.00 \$						
Order confirmation	03142012/00062	03/14/12				763.20 \$						
Order confirmation	03132012/00057	03/13/12				88,560.00 \$						
Order confirmation	03082012/00052	03/08/12				11,246.40 \$						
Order confirmation	03082012/00051	03/08/12				18,660.80 \$						
Order confirmation	03082012/00050	03/08/12				18,134.40 \$						
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

Order confirmation 04192012/00070

Order value: 45,043.53 \$

Prev. part payment inv.: 18,017.41 \$ 40.00 %

Still open: 27,026.12 \$ 60.00 %

Settle now: 27026.12 60 %

Open in future: 0.00 \$ 0.00 %

Abort OK

Show project totals

2 Projects [1 / 48 / 54]

Workflow List view [1 / 1 / 54]

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					

2 Projects [1 / 1 / 54]

Show project totals

The values are entered in the order confirmation and an overview of the order value that is still open appears with the next partial payment invoice.

The screenshot displays the ingenious.V12 software interface. The main window shows a 'Workflow List view' with a table of project documents. The table columns include Project document, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. The table lists various documents such as 'Part payment invoice', 'Order confirmation', 'Invoice', and 'Quotation' for different projects and customers.

A modal dialog titled 'Order confirmation 04192012/00070' is open, showing the following details:

Field	Value	Percentage
Order value	45,043.53 \$	
Prev. part payment inv.	18,017.41 \$	40.00 %
Still open	27,026.12 \$	60.00 %
Settle now	27026.12	60 %
Open in future	0.00 \$	0.00 %

The dialog has 'Abort' and 'OK' buttons at the bottom.

3.3.3.5 Creating final invoice

You create a final invoice in that you switch the order confirmation to a final invoice. All partial payment invoices that were provided for this project are designated in the project document and are drawn from the total project value.

The screenshot displays the ingenious.V12 software interface. On the left, a sidebar contains a tree view with categories like 'Workflows', 'Status', 'View', 'Trip', 'Representative', 'Method of payment', 'Incoming payments', 'User', 'Project state', and 'Scripts'. A context menu is open over the 'View' category, listing actions such as 'Create project document', 'Convert project document', 'Combine project documents', 'Delete project document', 'Create part payment invoice', 'Create closing invoice', 'Create combined invoice', 'Create mass payment', 'Show entire project', 'DTA Debit Export', 'Administer combined trips', 'Manage list views', and 'Free summary'.

The main window shows a table with the following columns: DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, Paifin, arc, R1, R2, R3. The table contains multiple rows of data, including project documents, quotations, and invoices, with various dates and amounts.

DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
04232012/00043	04/23/12	Capacity2	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+49 341 226210	13,868.73 \$	13,868.73 \$					
04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					

At the bottom left, it says '2 Projects [1 / 49 / 54]'. At the bottom right, there is a 'Show project totals' button.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 49 / 54]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [Off]
- Invoices [On]
- Part payment invoice [On]
- Credit notes [Off]

Status filter

- Paid inv. [On]
- Archiv. documents [On]

View filter

- From: 3/31/2006
- To: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]

Trip

- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Invoice	04232012/00043	04/23/12	Capacity2	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+49 341 226210	13,868.73 \$	13,868.73 \$					
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	763.20 \$						
Quotation	03232012/00036	03/23/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	0.00 \$						
Order confirmation	03162012/00066	03/16/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	1,598.70 \$						
Quotation - HV	03162012/HV000	03/16/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	3,738.00 \$						
Invoice	03162012/00038	03/16/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	1,598.70 \$	1,598.70 \$					
Quotation - Roll	03162012/Roll000	03/16/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	1,598.70 \$						
Quotation	03152012/00033	03/15/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	13,105.53 \$						
Quotation	03152012/00032	03/15/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	55.00 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	763.20 \$						
Order confirmation	03132012/00057	03/13/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	88,560.00 \$						
Order confirmation	03082012/00052	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	11,246.40 \$						
Order confirmation	03082012/00051	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	18,660.80 \$						
Order confirmation	03082012/00050	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	18,134.40 \$						
Order confirmation	03082012/00049	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	12,932.00 \$						
Order confirmation	03082012/00047	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	15,934.16 \$						
Order confirmation	03082012/00046	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	7,116.91 \$						
Order confirmation	03082012/00045	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	18,660.80 \$						
Order confirmation	03082012/00044	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	16,076.00 \$						
Order confirmation	03082012/00043	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	4,764.80 \$						
Order confirmation	03082012/00041	03/08/12	HV Accordion	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+1 123 456789	637.56 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					

Final settlement for OC 04192012/00070

Order value 45,043.53 \$

Prev. part payment inv. 18,017.41 \$ 40.00 %

Still open 27,026.12 \$ 60.00 %

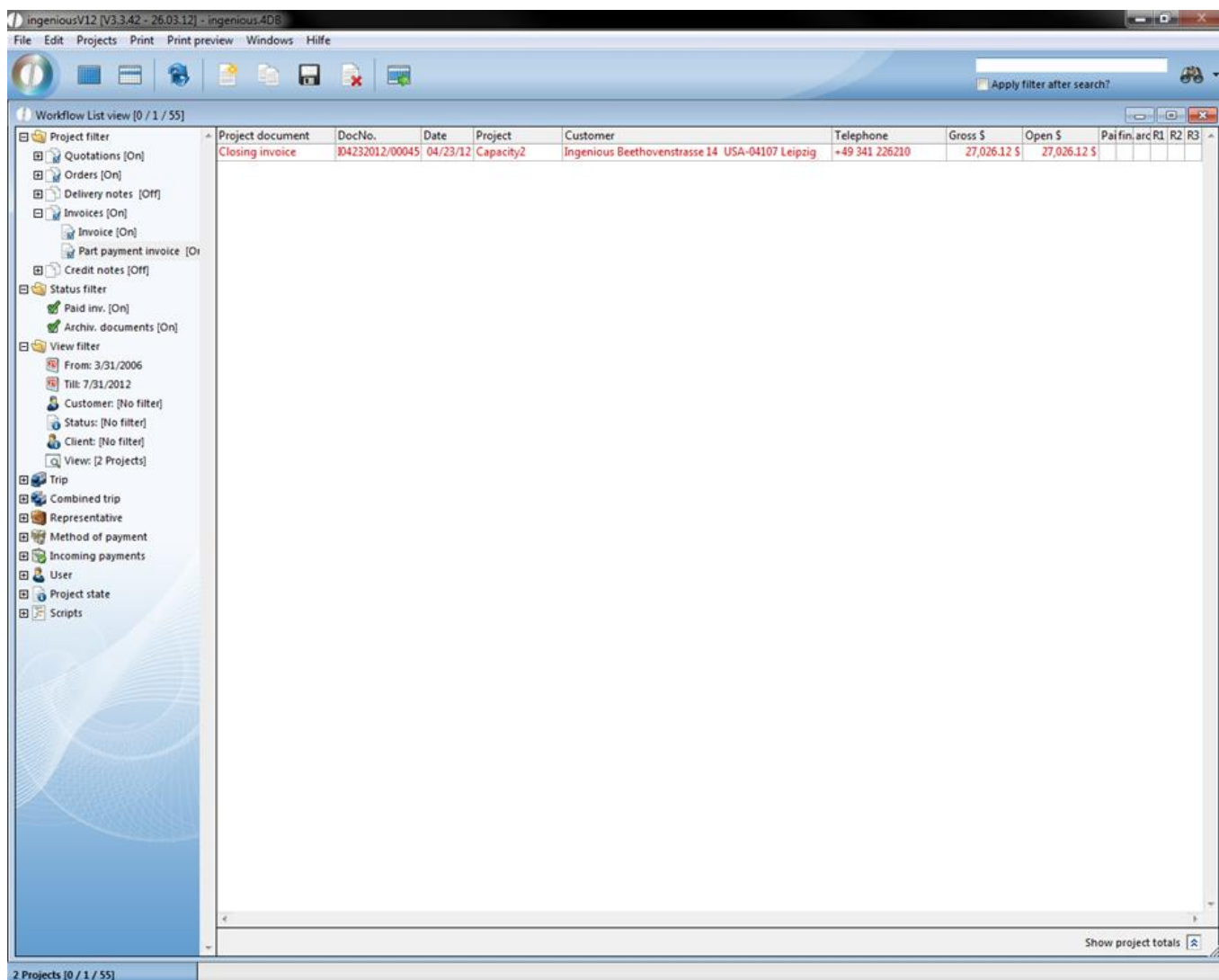
Settle now 27026.12 60 %

Open in future 0.00 \$ 0.00 %

Abort OK

Show project totals

2 Projects [1 / 49 / 54]



3.3.3.6 Creating combined invoice

If several contact projects are summarized into an invoice, it is important that the single order confirmations or delivery notes are closed and that they have the same project status. If this is not the case, a notice appears when attempting to create a collective invoice that refers you to it. In the collective invoice, the positions appear grouped according to the jobs. The headings indicate from which document the positions were taken.

The screenshot displays the ingenious.V12 software interface. A menu is open, showing options for project management and invoicing. The main window shows a table of project data with columns for DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. The table lists various projects, including Capacity2, Capacity1, one-family house, White Productions, Best Beer Garden, and Mrs. Sunshine.

Menu Options:

- Create project document
- Convert project document
- Combine project documents
- Delete project document
- Create part payment invoice
- Create closing invoice
- Create combined invoice
- Create mass payment
- Show entire project
- DTA Debit Export
- Administer combined trips
- Manage list views
- Free summary

Table Data:

DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$					
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$					
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$					
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$					
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$					
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$					
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$					
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$					
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$					
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$					
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$					
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$					
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$					
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$					
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$					
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$					
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$					
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$					

2 Projects [2 / 36 / 55]

Show project totals

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [2 / 36 / 55]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [Off]
- Invoices [Off]
- Invoice [Off]
- Part payment invoice [Off]
- Credit notes [Off]

Status filter

- Paid inv. [On]
- Archiv. documents [On]

View filter

- From: 3/31/2006
- To: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]

Trip

- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Order confirmation	03142012/00062	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	03082012/00052	03/08/12		Chicago 12345		11,246.40 \$						
Order confirmation	03082012/00051	03/08/12		to Highway Cl +1 4455667788		18,660.80 \$						
Order confirmation	03082012/00050	03/08/12		go 12345 +1 111222333		18,134.40 \$						
Order confirmation	03082012/00049	03/08/12		go 12345 +1 111222333		10,062.28 \$						
Order confirmation	03082012/00048	03/08/12		go 12345 +1 123456798		12,932.00 \$						
Order confirmation	03082012/00047	03/08/12		go 12345 +1 789 4561230		15,934.16 \$						
Order confirmation	03082012/00046	03/08/12		King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00045	03/08/12		King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7409 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$						
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$						
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$						

Create combined invoice

Old orders

- ☒ Retain unchanged
- ☐ Retain and archive
- ☐ Don't retain

Parameter

- ☒ Keep real times

Abort OK

Show project totals

2 Projects [2 / 36 / 55]

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [2 / 36 / 55]

Project filter

- Quotations [On]
- Orders [On]
- Delivery notes [Off]
- Invoices [Off]
- Invoice [Off]
- Part payment invoice [Off]
- Credit notes [Off]

Status filter

- Paid inv. [On]
- Archiv. documents [On]

View filter

- From: 3/31/2006
- To: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]

Trip

- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14	USA-04107 Leipzig	+49 341 226210	117,164.48 \$					
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14	USA-04107 Leipzig	+49 341 226210	45,043.53 \$					
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Quotation - Roll	03162012/Roll001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	0.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	763.20 \$						
Order confirmation	03072012/00037	03/07/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	31,329.92 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03082012/00038	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,097.00 \$						
Order confirmation	03082012/00039	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	2,263.74 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	637.56 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	4,764.80 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	9,264.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago	12345	15,934.16 \$						
Order confirmation	03082012/00048				+1 123456798	12,932.00 \$						
Order confirmation	03082012/00049				+1 111222333	10,062.28 \$						
Order confirmation	03082012/00050				+1 111222333	18,134.40 \$						
Order confirmation	03082012/00051				+1 111222333	18,660.80 \$						
Order confirmation	03082012/00052				+1 4455667788	11,246.40 \$						
Order confirmation	03232012/00067				+1 123 456789	2,862.00 \$						
Quotation	03272012/00040				+1 312/1234567	586,237.84 \$						
Order confirmation	04022012/00068				+1 312/1234567	586,237.84 \$						
Quotation	03142012/00031				+1 123 456789	55.00 \$						
Quotation - HV	03152012/HV000	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	3,738.00 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	13,105.53 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						

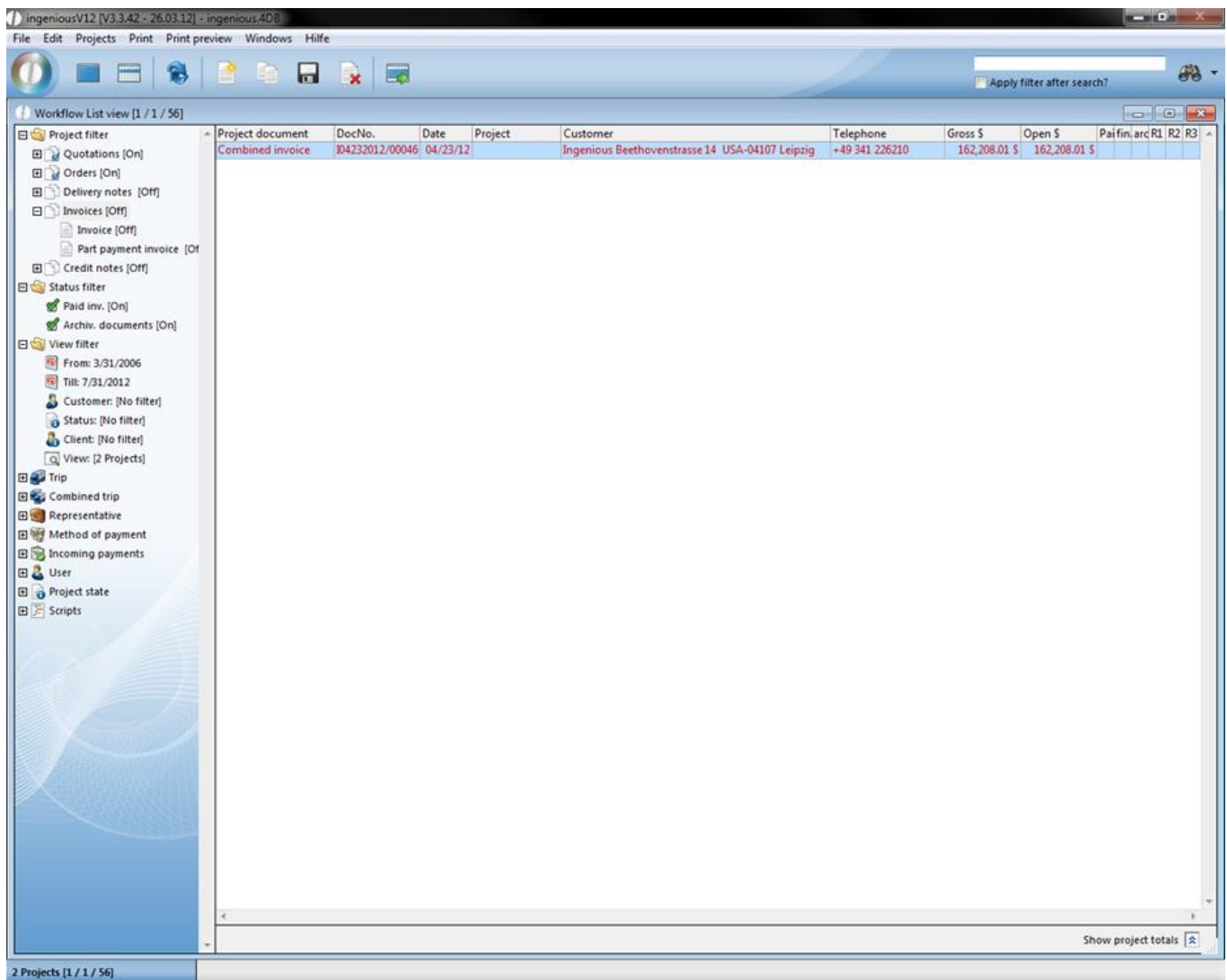
ingenious.net

2 documents of 2 marked projects have been combined in a combined invoice. Save changes?

Cancel OK

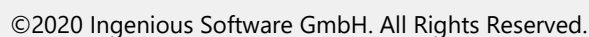
Show project totals

2 Projects [2 / 36 / 55]



3.3.3.7 Show entire project

Under the menu item, "Projects/Show entire project", you have the possibility to assign all project documents a project title. This is very helpful if a high number of project documents exist and if only one project is necessary.



Workflow List view [1 / 6 / 56]

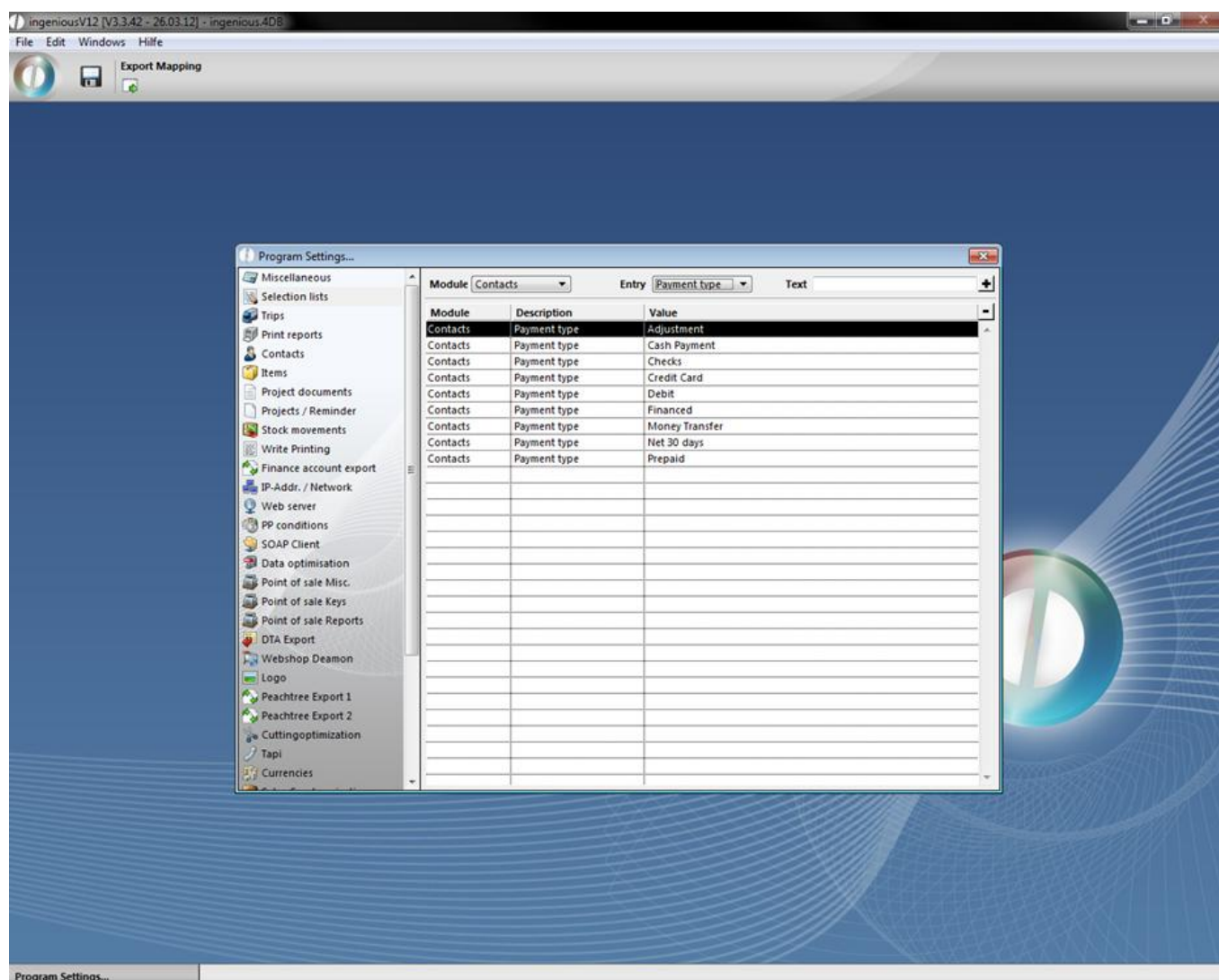
Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					

2 Projects [1 / 6 / 56]

3.3.3.8 DTA debit export

The DTA debit export allows the transfer of invoice debits that are drawn from contact in different online banking software systems. In order for this to be possible, the bank account must be entered and the contact and the bank collection must be activated. In the detail view of the invoice, the option, "Debit" must be selected in the field, "Payment type" in the "Payments" column.

In case the option, "Debit" is not available, it can be created as a new entry through the program settings in the "Selection lists" column.



If you have carried out all settings and if you choose the debit DTA export, the corresponding window opens. The export manager generates a list of all possible debits and automatically enters the amounts and texts.

The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408 application window. The main area shows a 'Workflow List view' with a table of invoices. A 'DTA Export - Debit' dialog box is open, showing a table of selected debits for export.

Workflow List view [1 / 15 / 58]

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	162,208.01 \$	✓				
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$	✓				
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					

DTA Export - Debit

Aktuelle Auswahl: From: 04/23/12 to: 04/23/12 Lastschriften je Kunde zusammenfassen

Customer	Debit text 1	Debit text 2	Debit text 3	Amount	Due till	Discount till Dt
✓ Ingenious	INV.-NO. 04232012/00046	CUST.-NO. 15529	Discount: 2,433.12 USD	159,774.89 \$	05/23/12	05/03/12 ✓
✓ Mrs Sunshine	INV.-NO. 03162012/00038	CUST.-NO. 5528		1,598.70 \$	04/15/12	03/26/12
✓ Mrs Sunshine	INV.-NO. 04192012/00041	CUST.-NO. 5528	Discount: 9.56 USD	628.00 \$	05/19/12	04/29/12 ✓

Buttons: Abort, Export

2 Projects [1 / 15 / 58] DTA Export - Debit Show project totals

The single position of the list is colored according to urgency. It is thus easy to recognize whether a transfer is urgent (red) or whether discount payment was possible (orange). The desired debits are selected with a mouse click and can then be imported into the bank software.. Important: In the program settings, enter the data of your bank account in the "DTA Export" area, otherwise an export is not possible.

In a drop down menu you have got the choice between four different display variants.

The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408 application window. The main area shows a 'Workflow List view' with a table of project documents. A 'DTA Export - Debit' dialog box is open, showing a list of selected invoices for export.

Workflow List view (1 / 15 / 58)

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	162,208.01 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					

DTA Export - Debit

From: 04/23/12 to: 04/23/12 ☐ Lastschriften je Kunde zusammenfassen

Invoice date	Debit text 2	Debit text 3	Amount	Due till	Discount till Dt
Net payment term	032012/00046	CUST.-NO. 15529	159,774.89 \$	05/23/12	05/03/12
discount deadl.	062012/00038	CUST.-NO. 5528	1,598.70 \$	04/15/12	03/26/12
Aktuelle Auswahl			628.00 \$	05/19/12	04/29/12
Mrs Sunshine	INV.-NO. 04192012/00041	CUST.-NO. 5528			

Buttons: Abort, Export

2 Projects [1 / 15 / 58] DTA Export - Debit

Check the field „Lastschriften je Kunde zusammenfassen“, when you want a combined export of the selected contact.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

Hilfe

Workflow List view [1 / 15 / 58]

Project filter

- Quotations [Off]
- Orders [Off]
- Delivery notes [Off]
- Invoices [On]
 - Closing invoice [On]
 - Combined invoice [On]
 - Invoice [On]
 - Part payment invoice [Off]
- Credit notes [Off]
- Status filter
 - Paid inv. [On]
 - Archiv. documents [On]
- View filter
 - From: 3/31/2006
 - To: 7/31/2012
 - Customer: [No filter]
 - Status: [No filter]
 - Client: [No filter]
 - View: [2 Projects]
- Trip
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	162,208.01 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
							10,000.00 \$					
							40,000.00 \$					
							50,000.00 \$					

DTA Export - Debit

Aktuelle Auswahl: From: 04/23/12 to: 04/23/12 ☒ Lastschriften je Kunde zusammenfassen

Customer	Debit text 1	Debit text 2	Debit text 3	Amount	Due till	Discount till Dt
✓ Ingenious	INV.-NO. 04232012/00046	CUST.-NO. 15529	Discount: 2,433.12 USD	159,774.89 \$	05/23/12	05/03/12
✓ Mrs Sunshine	INV.-NO. 03162012/00038	CUST.-NO. 5528		1,598.70 \$	04/15/12	03/26/12
✓ Mrs Sunshine	INV.-NO. 04192012/00041	CUST.-NO. 5528	Discount: 9.56 USD	628.00 \$	05/19/12	04/29/12
✓ Mrs Sunshine	AVIS FROM 04/23/2012	CUST.-NO. 5528		2,226.70 \$		

Abort Export

Show project totals

2 Projects [1 / 15 / 58] DTA Export - Debit

A click on the button "Export" will open up the windows default save dialog.

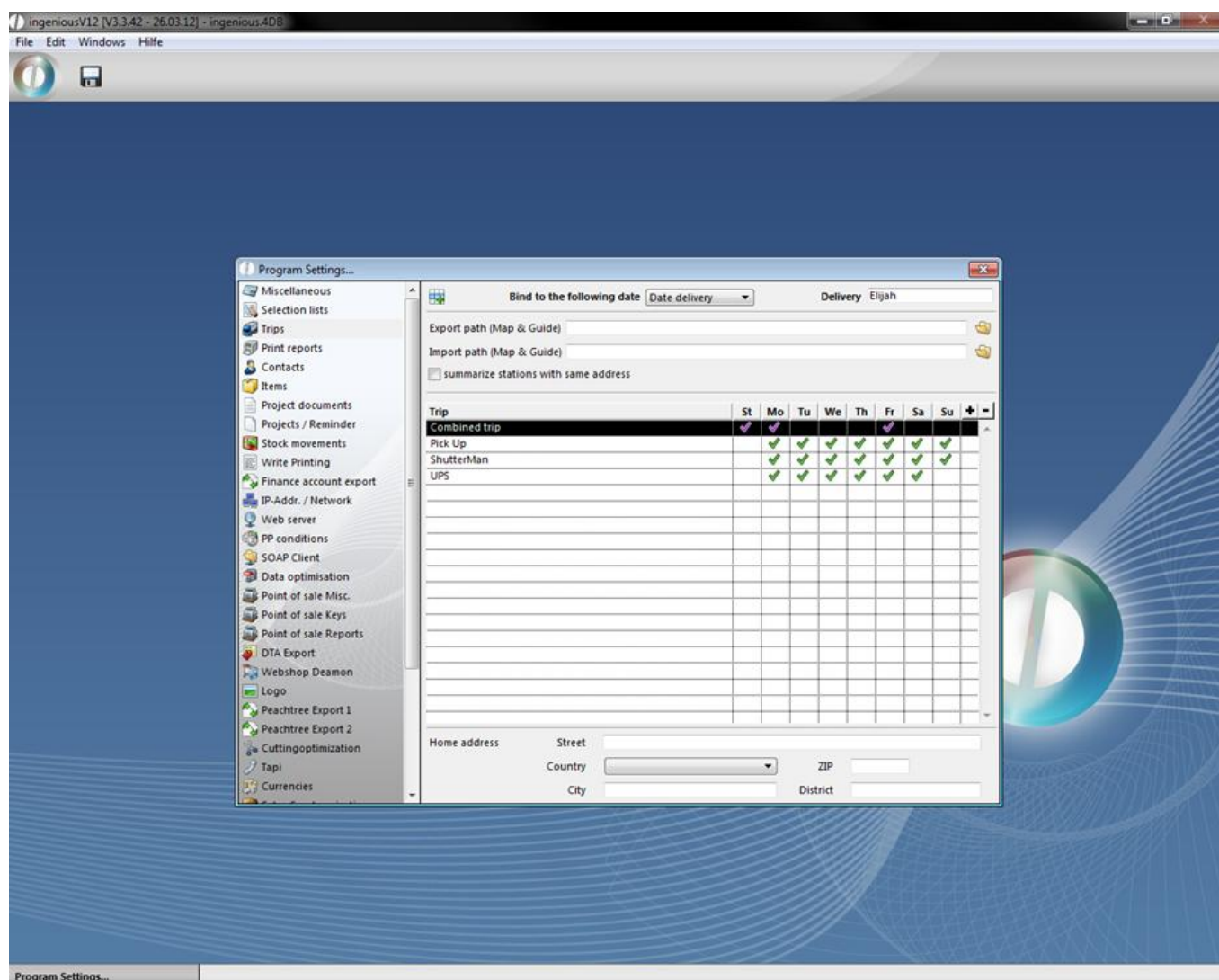
The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408 application window. The main area shows a 'Workflow List view' with a table of project documents. A dialog box titled 'DTA Debit Export' is open, showing a summary of 2 DTA debits exported.

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	162,208.01 \$	✓				
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	637.56 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$	✓				
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
							10,000.00 \$					
							40,000.00 \$					
							50,000.00 \$					

The 'DTA Debit Export' dialog box shows a summary of 2 DTA debits exported. The 'Aktuelle Auswahl' dropdown is set to 'Debit text 1'. The 'Customer' list includes Ingenious, Mrs Sunshine, and Mrs Sunshine. The 'Due till' and 'Discount till' dates are displayed for each debit.

3.3.3.9 Administer combined trips

With this project option, you have the possibility to flexibly create your delivery traffic flexibly. Here you can summarize different delivery trips. The project option, "Administer combined trips" assumes that one or more collective trips have nevertheless been created in the program settings, and that a trip as well as the corresponding appointments is determined for the project in the project detail view.



View of program settings with two created collective trips

The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42 - 26.03.12' and the database 'ingenious.4DB'. The menu bar includes 'File', 'Edit', 'Projects', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains icons for various functions. The main window is titled 'Projects detail view [Mrs Sunshine] - [Invoice ID4232012/00043]'. On the left, a sidebar lists navigation options: 'Miscellaneous', 'Items', 'Payments', 'Times', 'Parameter', 'Documents and Notes', 'own fields', 'File attachments', and 'Print preview'. The 'Miscellaneous' column is active, showing project data for 'Mrs Sunshine'. The 'Miscellaneous project data' section includes fields for 'Number' (Invoice ID4232012/00043), 'From' (04/23/2012), 'Project', 'City/Date' (Mesa, 4/23/2012), and 'Subject'. The 'Billing address / Shipping address' section shows 'Bill. Add.' as 'Mrs Sunshine' and 'Deliv.' as 'Mrs. Sunshine, 5566 Sunshine Avenue, Chicago 12345'. The 'Internal control' section includes 'Contact person', 'Representative' (Mike Ernesti), 'Notes', 'Trip' (dropdown), 'Combined tr' (dropdown), 'Project state', and 'Delivery'. The 'Status' section has checkboxes for 'Finalised' and 'Archived'. The bottom status bar shows 'Created 4/23/2012 10:42:16 - admin' and 'Modified 4/23/2012 10:42:16 - admin'.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.4DB

File Edit Projects Print Print preview Windows Hilfe

Projects detail view [Mrs Sunshine] - [Invoice ID4232012/00043]

Miscellaneous project data

Number Invoice ID4232012/00043 From 04/23/2012

Project City/Date Mesa, 4/23/2012

Subject

Billing address / Shipping address

Bill. Add. Mrs Sunshine Deliv. Mrs. Sunshine

Mrs. Sunshine
5566 Sunshine Avenue
Chicago 12345

Cust. Add.

Internal control

Contact person

Representative Mike Ernesti

Notes

Trip

Combined tr

Project state

Delivery

Status



☐ Finalised ☐ Archived

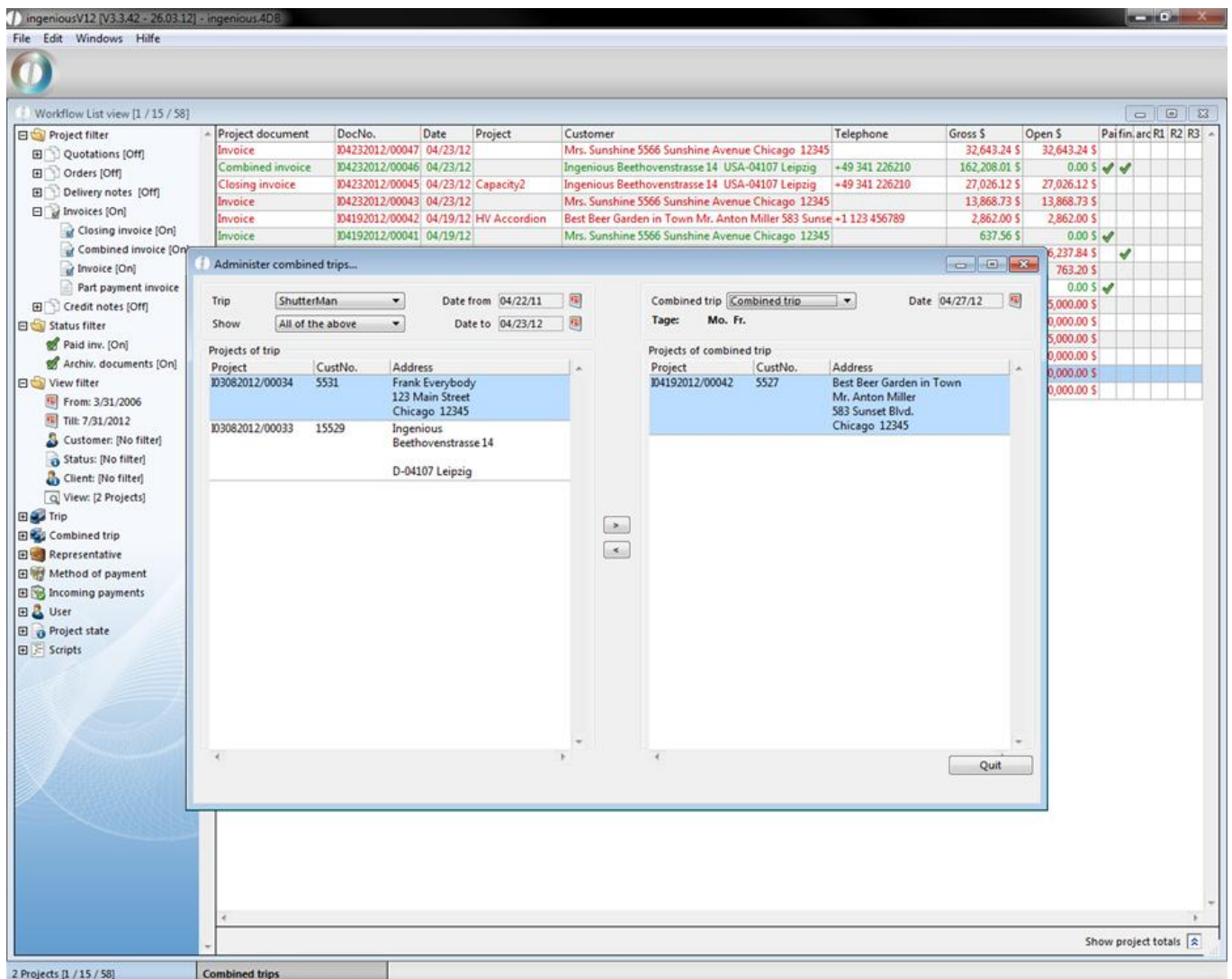
Created 4/23/2012 10:42:16 - admin Modified 4/23/2012 10:42:16 - admin

View of the project detail view column "Miscellaneous"

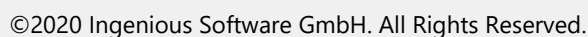
The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42 - 26.03.12' and the database 'ingenious.408'. The menu bar includes 'File', 'Edit', 'Projects', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains icons for various functions, including a search icon and a filter icon. The main window is titled 'Projects detail view [Mrs Sunshine] - [Invoice ID4232012/00043]'. On the left, a sidebar lists navigation options: 'Miscellaneous', 'Items', 'Payments', 'Times', 'Parameter', 'Documents and Notes', 'own fields', 'File attachments', and 'Print preview'. The 'Times' column is selected, showing a table with columns: 'Date', 'Employee', 'From', 'Till', 'Job classification', and 'Description'. Below the table, there are fields for 'Calculated time' (00:00 hrs), 'Actual time' (00:00 hrs), 'Use date' (Date delivery), and 'Main technician'. The 'Delivery times' section shows 'Time from' (00:00:00), 'Till' (00:00:00), and 'Duration' (00:00:00). The 'Planning' section includes a grid of date fields: 'Promise Date' (00/00/00), 'Manufacturing' (00/00/00), 'Date 2' (00/00/00), 'Assembly' (00/00/00), 'Date 3' (00/00/00), 'Delivery' (04/23/2012), 'In Production' (00/00/00), 'Date 5' (00/00/00), 'Date 6' (00/00/00), 'Date 7' (00/00/00), 'Date 8' (00/00/00), and 'Date 9' (00/00/00). The 'Delivery' field is highlighted with a red box.

View of the project detail view column, "Times" (Set assembly date)

In the window "Administer collective trips ..." you can select the respective trip in the left area in the "Trip" field, and you can select the desired projects in the "Announcements" field. With the  button, you can select the desired time period. In the right window area, you then select the corresponding collective trip. The date of the next collective trip as well as the suitable days, are automatically indicated. With the  button, you now have the possibility to assign one of the displayed trips of the collective tour.



In the right window, all projects which were already accounted for in the project detail view as a collective trip are also automatically indicated. If you now assign a collective trip to a new project, the trip setting also changes in the project detail view. The "Trip" field is now closed and the selective collective trip is shown.




View of the export function

3.3.3.10 Creation and forwarding of project documents

With the "Projects" concept, all documents of the workflow area are meant, such as the quotation, cost estimate, order confirmation, invoice, delivery notice and credit note.

The screenshot displays the ingenious.V12 software interface. The main window shows a 'Workflow List view' with a table of project documents. The table columns include Document, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and various status indicators. A 'Create new project...' dialog box is open, showing a list of document types to choose from: Quotation, Quotation - HV, Quotation - Parts, Quotation - Piranha, Quotation - Roll, Order confirmation, Invoice, Delivery note, and Credit note. The 'Use special prices' checkbox is checked.

Document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	I04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Quotation	I04232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Combined invoice	I04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	I04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	I04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Order confirmation	I04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	I04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	I04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	I04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$					
Invoice	I04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	I04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	I03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	I03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	I03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	I03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	I03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	I03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Order confirmation	I03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation - HV	I03162012/HV000	03/16/12				3,738.00 \$						
Invoice	I03162012/00038	03/16/12				1,598.70 \$	0.00 \$					
Quotation - Roll	I03162012/Roll000	03/16/12				1,598.70 \$						
Quotation	I03152012/00033	03/15/12				13,105.53 \$						
Quotation	I03152012/00032	03/15/12				0.00 \$						
Quotation - HV	I03142012/HV000	03/14/12				0.00 \$						
Quotation	I03142012/00030	03/14/12				0.00 \$						
Quotation	I03142012/00029	03/14/12				1,198.80 \$						
Quotation	I03142012/00028	03/14/12				0.00 \$						
Quotation	I03142012/00031	03/14/12				55.00 \$						
Order confirmation	I03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Order confirmation	I03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	I03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Order confirmation	I03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
Order confirmation	I03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 1112223333	18,134.40 \$						
Order confirmation	I03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 1112223333	10,062.28 \$						
Order confirmation	I03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Order confirmation	I03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Order confirmation	I03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	I03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	I03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	I03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	I03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	I03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	I03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Invoice	I03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	I03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					

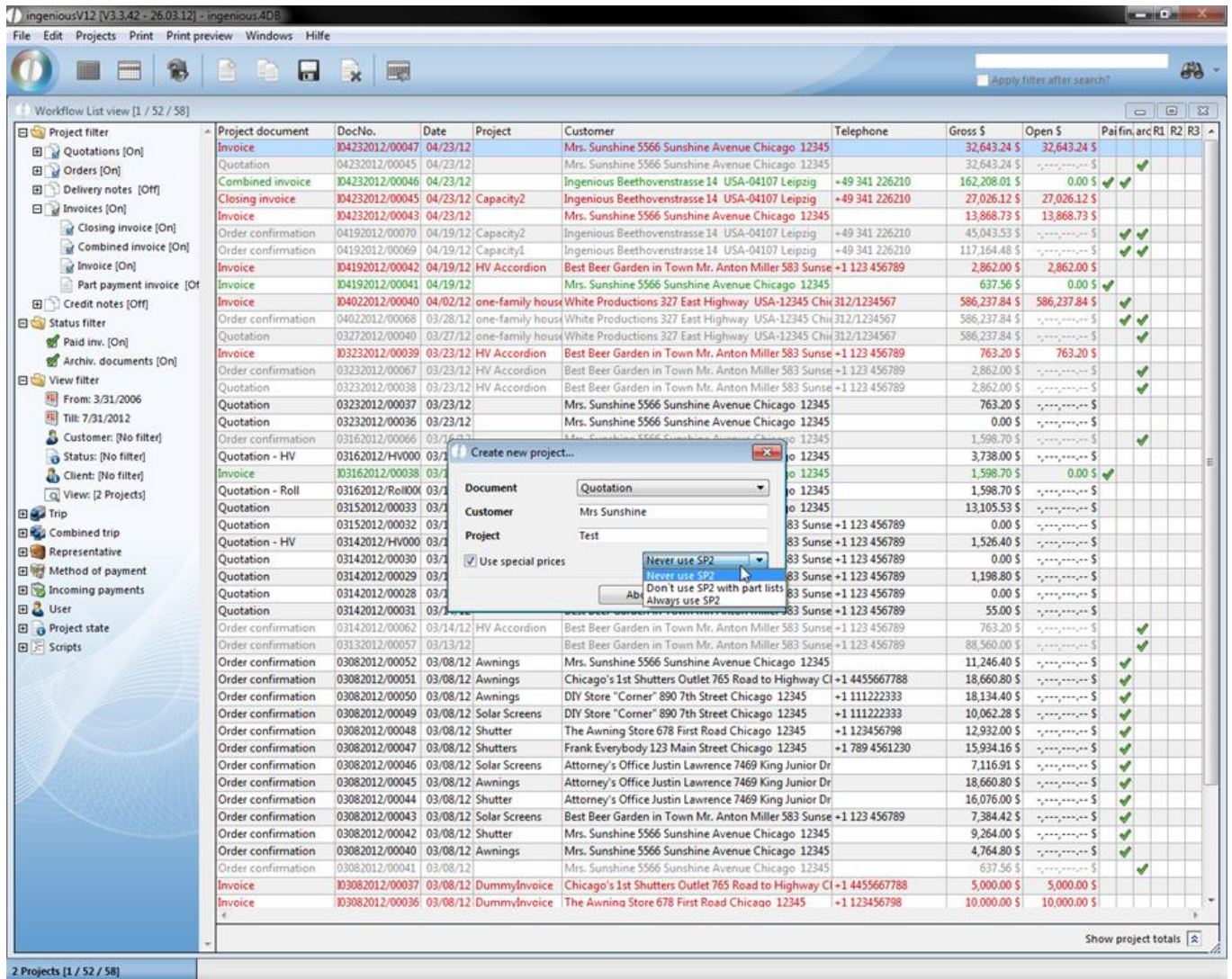
Two possibilities are available to you for creating a new project. You can create a new document with the "Projects" – "Create project document" with the menu "Projects" or click on the corresponding icon  in the icon bar. In the dialog window that appears, you choose the document to be provided with the context menu. If you don't know the matchcode of the contact or if it pertains to a new contact, enter the first letter or a wild character (* or a @). As soon as you try to switch to the next field, the contact module in which you can look for the contact opens. By double-clicking on the cell, you transfer the contact. If you must enter the contact only anew, the detailed view appears to enter the contact data. After you secure the data, you click on the top right on the checkmark in order to transfer this contact for the project.

Select and insert contact... [1 / 10 / 12]

Matchcode	CustNo.	Telephone	Company / Name	Street	Count	Zip	City	Fax
Best Beer Garden in TownM	5527	+1 123 456789	Best Beer Garden in Town Mr. Anton Mil	583 Sunset Blvd.	US	12345	Chicago	+1 123 456780
Mrs Sunshine	5528		Mrs. Sunshine	5566 Sunshine Avenue	US	12345	Chicago	
Ingenious	15529	+49 341 226210	Ingenious	Beethovenstrasse 14	USA	04107	Leipzig	+49 341 2262120
Frank Everybody	5531	+1 789 4561230	Frank Everybody	123 Main Street	US	12345	Chicago	
Tom Customer	5532	+1 4567890 123	Tom Customer	456 West Highway	US	12345	New York	
The Awning Store	5533	+1 123456798	The Awning Store	678 First Road	US	12345	New York	
DIY Store Corner	5534	+1 111222333	DIY Store "Corner"	890 7th Street	US	12345	Chicago	
Chicagos 1st Shutters Outlet	5535	+1 4455667788	Chicago's 1st Shutters Outlet	765 Road to Highway	US	12345	Chicago	
Lawrence	5526		Attorney's Office Justin Lawrence	7469 King Junior Drive	US	12345	Chicago	
White Productions	5556	312/1234567	White Productions	327 East Highway	USA	12345	Chicago	312/1234568


2 Projects [1 / 52 / 58] Select and insert contact...

In addition, you can determine whether the special fixed prices for the contacts should be used, and how you should proceed with the sales price 2.



The screenshot displays the ingenious.V12 software interface, specifically the 'Workflow List view' (1 / 52 / 58). The main window shows a list of project documents with columns for Document No., Date, Project, Customer, Telephone, Gross \$, Open \$, and various status indicators. A 'Create new project...' dialog box is open, allowing users to select a document type (Quotation), customer (Mrs. Sunshine), and project (Test). The dialog also includes a checkbox for 'Use special prices' and a dropdown menu for 'Never use SP2'.

Document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	32,643.24 \$	32,643.24 \$					
Quotation	04232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	32,643.24 \$						
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	13,868.73 \$	13,868.73 \$					
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	637.56 \$	0.00 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	0.00 \$						
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	1,598.70 \$						
Quotation - HV	03162012/HV000	03/16/12				3,738.00 \$						
Invoice	03162012/00038	03/16/12				1,598.70 \$	0.00 \$					
Quotation - Roll	03162012/Roll000	03/16/12				1,598.70 \$						
Quotation	03152012/00033	03/15/12				13,105.53 \$						
Quotation - HV	03142012/HV000	03/14/12				0.00 \$						
Quotation	03142012/00030	03/14/12				1,526.40 \$						
Quotation	03142012/00030	03/14/12				0.00 \$						
Quotation	03142012/00029	03/14/12				1,198.80 \$						
Quotation	03142012/00028	03/14/12				0.00 \$						
Quotation	03142012/00031	03/14/12				55.00 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	11,246.40 \$						
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago	12345	18,134.40 \$						
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago	12345	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago	12345	12,932.00 \$						
Order confirmation	03082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago	12345	15,934.16 \$						
Order confirmation	03082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	03082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	03082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	03082012/00043	03/08/12	Solar Screens	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	03082012/00042	03/08/12	Shutter	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	9,264.00 \$						
Order confirmation	03082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	4,764.80 \$						
Order confirmation	03082012/00041	03/08/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago	12345	637.56 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago	12345	10,000.00 \$	10,000.00 \$					

In order to create a delivery notice from an invoice, the function "Forward project status" is available whereby you can activate by clicking on the  icon. An editing window opens in which you can determine what is transferred into the new project document and what should happen to the old document. Also in the detailed view of the project documents, you have the possibility to forward the project status.

The screenshot shows the ingenious.V12 software interface. The main window displays a table of project documents. A modal dialog box titled "Project [Invoice 104232012/00047]" is open, showing options to "Convert to" (Delivery note) or "Old document" (Retain unchanged, Retain and archive, Don't retain). The dialog also has checkboxes for "Keep header + footer", "Keep real times", and "Keep document no.".

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	104232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Quotation	104232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Combined invoice	104232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	104232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Invoice	104232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Order confirmation	104192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	104192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	104192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	104192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$					
Invoice	104022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Order confirmation	104022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Quotation	103272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	103232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Order confirmation	103232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	103232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	103232012/00037	03/23/12				763.20 \$						
Quotation	103232012/00036	03/23/12				0.00 \$						
Order confirmation	103162012/00066	03/23/12				1,598.70 \$						
Quotation - HV	103162012/HV000	03/23/12				3,738.00 \$						
Quotation - Roll	103162012/Roll000	03/23/12				1,598.70 \$	0.00 \$					
Quotation	103152012/00033	03/23/12				1,598.70 \$						
Quotation - HV	103142012/HV000	03/23/12				13,105.53 \$						
Quotation	103142012/00030	03/23/12				0.00 \$						
Quotation	103142012/00029	03/23/12				0.00 \$						
Quotation	103142012/00028	03/23/12				1,198.80 \$						
Quotation	103142012/00031	03/23/12				0.00 \$						
Order confirmation	103142012/00062	03/23/12				55.00 \$						
Order confirmation	103132012/00057	03/23/12				763.20 \$						
Order confirmation	103082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		88,560.00 \$						
Order confirmation	103082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	11,246.40 \$						
Order confirmation	103082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,660.80 \$						
Order confirmation	103082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
Order confirmation	103082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,062.28 \$						
Order confirmation	103082012/00047	03/08/12	Shutters	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	12,932.00 \$						
Order confirmation	103082012/00046	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		15,934.16 \$						
Order confirmation	103082012/00045	03/08/12	Awnings	Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Order confirmation	103082012/00044	03/08/12	Shutter	Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Order confirmation	103082012/00043	03/08/12	Solar Screens	Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Order confirmation	103082012/00042	03/08/12	Shutter	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Order confirmation	103082012/00040	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Order confirmation	103082012/00041	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Order confirmation	103082012/00037	03/08/12	DummyInvoice	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Invoice	103082012/00036	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	103082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					

3.3.4 Project detail view

3.3.4.1 Miscellaneous

Button overview



Create new project



Convert project



Save current state now



Delete selected project



Create task

With the creation of projects, there are two different dates: the printing date and the system date.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Projects Print Print preview Windows Hilfe

Projects detail view [Mrs Sunshine] - [Quotation 04232012/00046]

Miscellaneous project data

Number: 04232012/00046 From: 04/23/2012

Project: Test City/Date: Mesa, 4/23/2012

Subject:

Customer address / Shipping address

Cust. Add.: Mrs Sunshine

Deliv.:

Mrs. Sunshine
5566 Sunshine Avenue
Chicago 12345

Bill. Add.:

Internal control

Contact person: Aaron Admin Trip: Project state:

Representative: Mike Ernesti Combined tr: Delivery:

Notes:

Status: ☐ Finalised ☐ Archived

Created: 4/23/2012 12:56:33 - admin Modified: 4/23/2012 12:56:33 - admin

[Quotation 04232012/00046]

Aside from the assigned or assumed general data that is automatically taken from the pre-settings, such as document number and invoice address, you can add other more. If the goods are not directly delivered to the contacts but rather to a construction site or another storage area, you can add a delivery address or other addresses with **Bill. Add.** "Address 3/Adresse 4" or select them from the contact folder. Special placeholders have been developed for printing these data in the project documents. For corresponding entries in the contact folders, these fields are automatically filled with the new setup of projects.

General project detail view

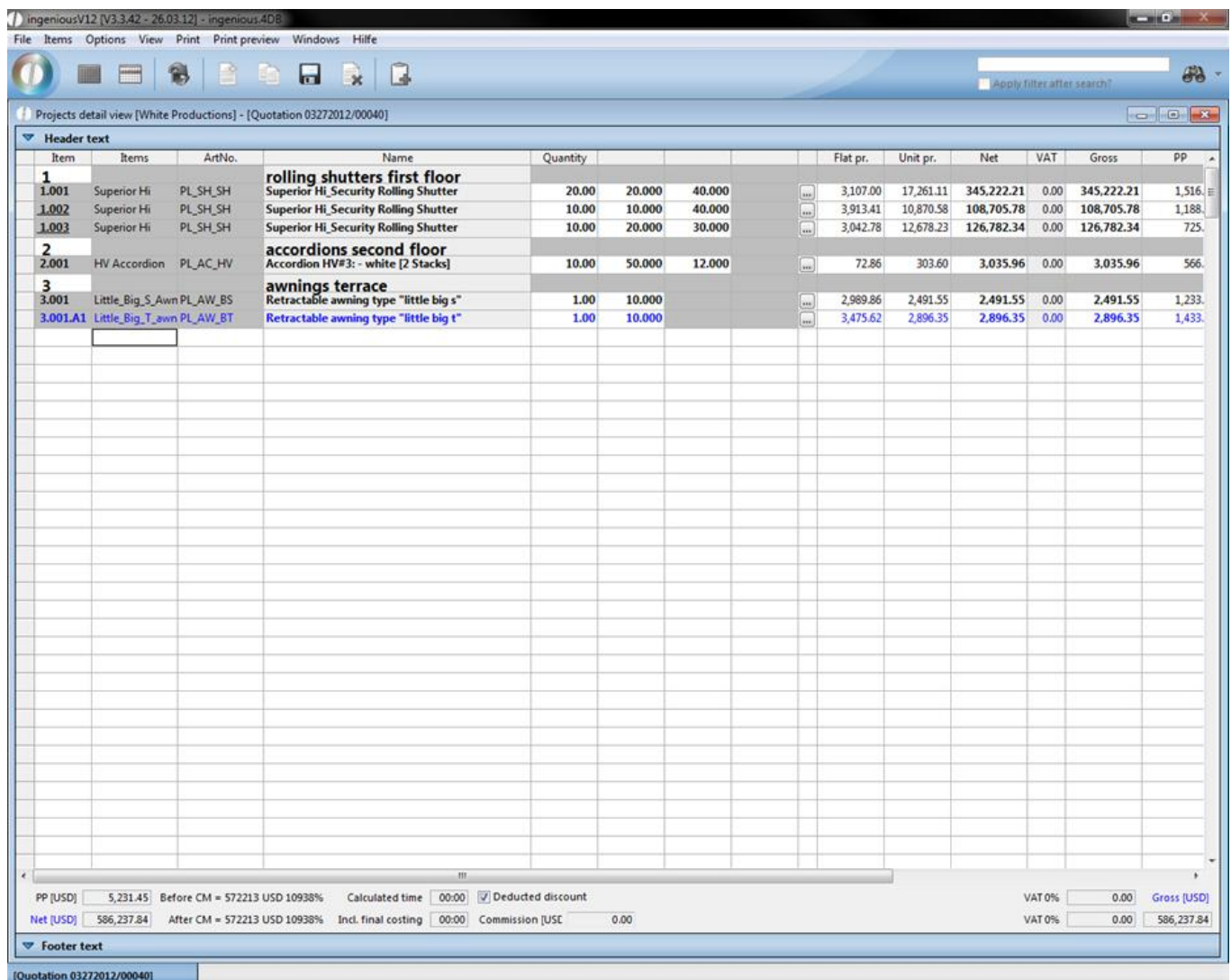
In addition, the trip, the representative and the collective trip are selectable. In the "Project status" list field, the actual project status can be entered so that every employee sees what the last processing status of the project was. You determine entries in the list field in the program settings in the area "Selection lists" using the module, "Projects".

Status change / Stock

In order to have an overview of projects not yet finished, you should always update the status with the status change. In order to finish a project, highlight the "Closed" field with a checkmark by clicking on the small box. You should close an order confirmation for example if this has become forwarded to an invoice/final invoice or to an invoice that protects against unwanted changes. Documents are archived if they are no longer necessary. This raises the clarity of your list views. With forwarding of the projects, you can allow them to be archived automatically. In case of emergency, archived documents can also be reverted back to. In the "Program settings" management tool in the "Projects/Reminder" column, you can also determine when a stock posting should be explained (after the end of a confirmation order, invoice or delivery notice). However, a condition for it is that in the item detail view in the "Stock monitor" column, the field "Automatic stock guide" was activated. The field "Stock posted" then appears with the projects where stock postings should be carried out with an order confirmation as in the example shown. When you close the confirmation order, the stock of the used items is updated at the same time. The small box beside "Stock booked" is marked and the stock is reduced in the product catalog by the amount of the projects. This way you have a permanent stock booking guide and the current supplies always ready for necessary review of an order.

3.3.4.2 Items

In the selection area, click on the "Items" area, then the item template with its two text fields (header, footer) opens.



ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [White Productions] - [Quotation 03272012/00040]

Apply filter after search?

Header text		Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1 rolling shutters first floor												
1.001	Superior Hi	PL_SH_SH	Superior Hi_Security Rolling Shutter	20.00	20.000	40.000	3,107.00	17,261.11	345,222.21	0.00	345,222.21	1,516.
1.002	Superior Hi	PL_SH_SH	Superior Hi_Security Rolling Shutter	10.00	10.000	40.000	3,913.41	10,870.58	108,705.78	0.00	108,705.78	1,188.
1.003	Superior Hi	PL_SH_SH	Superior Hi_Security Rolling Shutter	10.00	20.000	30.000	3,042.78	12,678.23	126,782.34	0.00	126,782.34	725.
2 accordions second floor												
2.001	HV Accordion	PL_AC_HV	Accordion HV#3: - white [2 Stacks]	10.00	50.000	12.000	72.86	303.60	3,035.96	0.00	3,035.96	566.
3 awnings terrace												
3.001	Little_Big_S_Awn	PL_AW_BS	Retractable awning type "little big s"	1.00	10.000		2,989.86	2,491.55	2,491.55	0.00	2,491.55	1,233.
3.001.A1	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	1.00	10.000		3,475.62	2,896.35	2,896.35	0.00	2,896.35	1,433.

PP [USD] 5,231.45 Before CM = 572213 USD 10938% Calculated time 00:00 Deducted discount

Net [USD] 586,237.84 After CM = 572213 USD 10938% Incl. final costing 00:00 Commission [USD] 0.00

VAT 0% 0.00 Gross [USD]

VAT 0% 0.00 586,237.84

Footer text

[Quotation 03272012/00040]

Example of an item template

Header and footer text

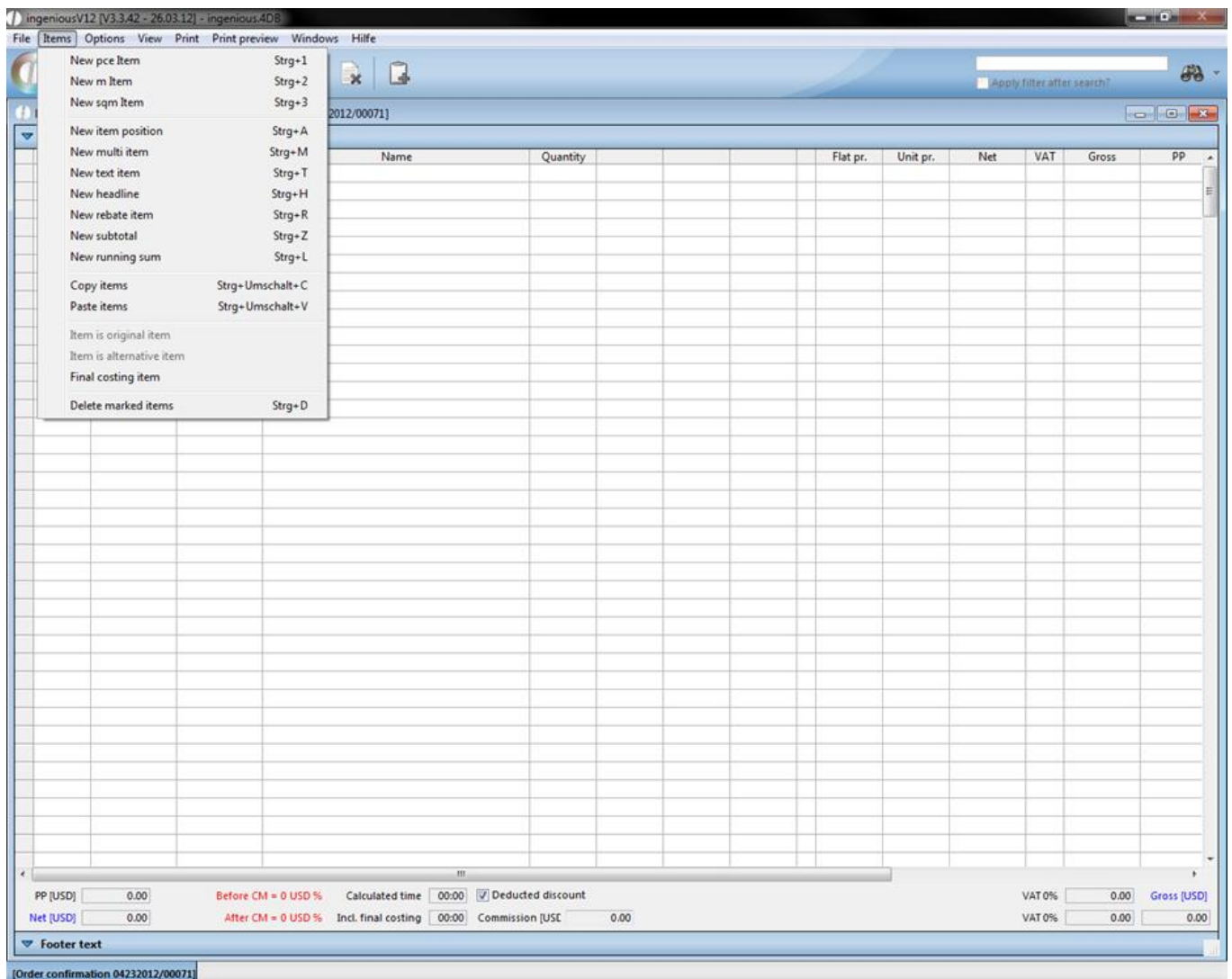
You can open the header and footer text fields by clicking on the arrows and summarize a free text in the field that appears, or insert a text module with the F3 key (Abbreviation + F3 or F3 + choice from the text template administration).

[illegible]

Header text of the project detail view

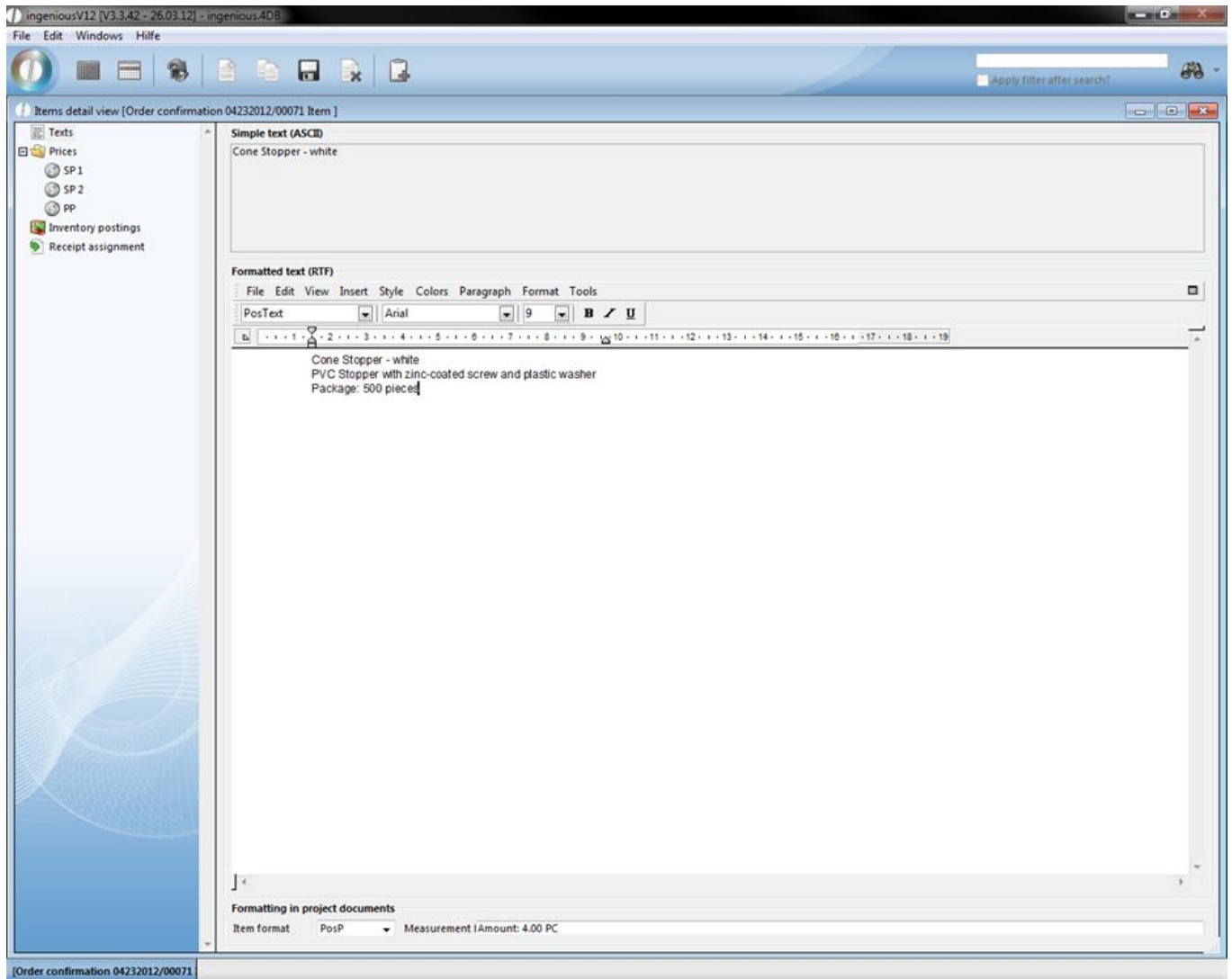
Direct invoicing item

A direct invoicing item is an item that is not entered in the item catalog because it is not often required for example, or does not belong to the normal company product line. A direct invoicing item is summarized in the item template with the menu point "Items" or through the direct entry of the item template. There are three different categories according to sales units.



Parts price-item

Select the item, "New direct invoice parts item" in the menu, "Items" in the Ingenious.V12 window. The window "Item detail view" opens in which you can describe the item and determine the sales and purchase prices. Here the entered prices are counted per piece.



Summarize parts item position texts

In the lower part of the window, you see the item format and the measurement line. According to the selection of the item type (item format), the suitable dimension line is entered next to the corresponding item line. This is adapted by us according to your wishes in the program settings.

In the document printing, the measurement lines are canceled by choice. In our example, the measurement text appears: Amount: 4.00 PC that correspond to the the given item values.

Nevertheless, you can also enter the prices directly in the table. If you would like to open the window once again, it is sufficient to double-click in the "Description" cell of the desired item. It is easier to enter a parts item, in that you enter the number of pieces in the corresponding line in the "Amount" column. A direct invoice parts item is automatically entered, which you can work on as described above.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00	0.91	0.91	3.64	0.00	3.64

Footer text

PP [USD] 1.72 Before CM = 2 USD 108% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD] 3.64

Net [USD] 3.64 After CM = 2 USD 108% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00

[Order confirmation 04232012/00071]

Meter and square meter items

You collect goods that are calculated after unit of length with "New direct invoicing m-item" and the item according to surface area with "New direct invoicing qm item". After entering the item data and closing the detail view, the positions appear in the project document.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/000711]

Header text

Item	Items	ArtNo.	Name	Quantity	X inch	Y inch	Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66

Footer text

PP [USD] 93.07 Before CM = 11038 USD 11860% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

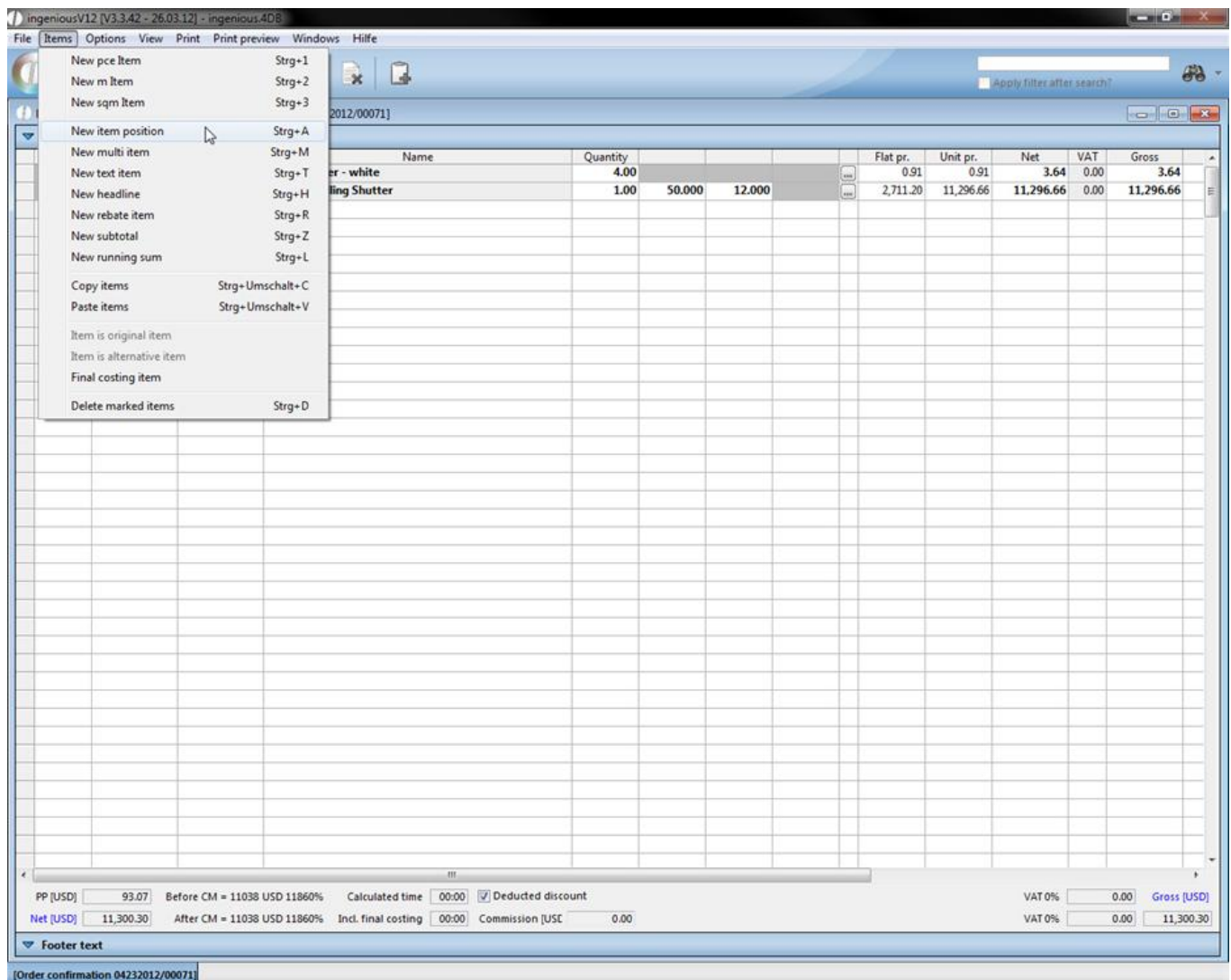
Net [USD] 11,300.30 After CM = 11038 USD 11860% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 11,300.30

[Order confirmation 04232012/000711]

Project detail view with items

The completion of the amounts and lengths automatically leads to the new calculation of the sums. Here you can also enter the items directly into the template. For a meter price, you enter the length in the "X cm" column and for a square meter item, you insert the width in the "Y cm" column. Ingenious.V12 will automatically choose the correct direct invoicing item.

item position



Frequently used typical company items are collected in the product catalogue. In order to insert such an item in your project document, enter the item number or the matchcode. The item is transferred from the catalog. If you would like to search for items with the joker character or product groups for example, choose "New item item" in the "Items" menu or alternatively enter * directly into the respective blank line. The item catalog is opened and with a double-click, you can select an item with the search function or by entering a matchcode.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Items Import/Export Print Print preview Windows Hilfe

Apply filter after search?

Select and insert sales product... [1 / 3047 / 3879]

Matchcode	Item number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
# 6 Fisher Plug - universal mount plug	400900-00	awm013x0118n	# 6 Fisher Plug - universal mount plug	229.95 / Piece	0.04 / Piece
# 6 Fisher Plug - universal mount plug	400900-00	awm013x0118n	# 6 Fisher Plug - universal mount plug	229.95 / Piece	0.04 / Piece
#14 x 3.25" SS Panel Mate	461129-30	/25N325TMPP	#14 x 3.25" SS Panel Mate - Silver Coated	30.87 / PC	0.19 / box100
#14 x 3" SS Panel Mate FL	461129-30		#14 x 3" SS Panel Mate pro	30.87 / box100	21.00 / box100
1 Ch. Remote Wall Mount Transmitter	164024-02	1810898	1 Ch. Decoflex Remote Wall Mount Transmitter- cream	135.89 / Piece	54.56 / Piece
1 Ch. Remote Wall Mount Transmitter	164024-02	1810898	1 Ch. Decoflex Remote Wall Mount Transmitter- cream	135.89 / Piece	54.56 / Piece
1 Ch. Remote Wall Mount Transmitter	164024-01	1810897	1 Ch. Decoflex Remote Wall Mount Transmitter- white	127.46 / Piece	54.56 / Piece
1 Ch. Remote Wall Mount Transmitter	164024-01	1810897	1 Ch. Decoflex Remote Wall Mount Transmitter- white	127.46 / Piece	54.56 / Piece
1 Ch. Remote Transmitter Waterproof	164022-00	- 6301014	1 Channel Remote Transmitter Waterproof	69.00 / Piece	31.09 / Piece
1 Ch. Remote Transmitter Waterproof	164022-00	- 6301014	1 Channel Remote Transmitter Waterproof	69.00 / Piece	31.09 / Piece
1 Channel	2005326		Key Chain1_2 Channel_Simu	55.00 / PC	27.50 / PC
1_2 Channel	2005914		Key Chain1_2 Channel_Simu	100.00 / PC	27.50 / PC
1:11 Record Gear	143001-00	6A2.3811/PF7	1:11 Record Gear	26.17 / Piece	11.81 / Piece
1:11 Record Gear FL	143001-00	- 6A2.3811/PF8	1:11 Record Gear	26.17 / Piece	11.81 / Piece
1:5 Record Cardan	143000-00	6A2.3805/PF7	1:5 Record Gear	24.69 / Piece	10.71 / Piece
1:5 Record Cardan FL	143000-00	- 6A2.3805/PF8	1:5 Record Cardan	24.69 / Piece	10.71 / Piece
1" Rail, brown	130107-04	13028007?	1" Rail - brown	5.00 / ft	2.25 / ft
1" Rail, white	130107-01	130280001	1" Rail - white	1.35 / ft	1.59 / ft
1/2" Hole Plug (Beauty Button), beig	157000-03		1/2" Hole Plug (Beauty Button) - beige	0.15 / Piece	0.05 / Piece
1/2" Hole Plug (Beauty Button), beig	157000-03		Hole Plug (Beauty Button) - beige	0.15 / Piece	0.05 / Piece
1/2" Hole Plug (Beauty Button), blac	157000-08		1/2" Hole Plug (Beauty Button), black	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), blac	157000-08		Hole Plug (Beauty Button), black	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), brow	157000-04		1/2" Hole Plug (Beauty Button) - brown	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), brow	157000-04		1/2" Hole Plug (Beauty Button) - brown	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), creal	157000-02		1/2" Hole Plug (Beauty Button) - cream	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), creal	157000-02		Hole Plug (Beauty Button) - cream	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), gray	157000-05		1/2" Hole Plug (Beauty Button) - gray	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), gray	157000-05		Hole Plug (Beauty Button) - gray	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), silve	157000-07		Hole Plug (Beauty Button), silver	5.00 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), whit	157000-01	HEY2644	1/2" Hole Plug (Beauty Button) - white	0.15 / Piece	0.06 / Piece
1/2" Hole Plug (Beauty Button), whit	157000-01		Hole Plug (Beauty Button) - white	0.15 / Piece	0.06 / Piece
1/4" Diameter Grille Rod DE	132000-00		1/4" Diameter Grille Rod - mill	0.50 / ft	0.25 / ft
1/4" Diameter Grille Rod FL	132000-00		1/4" Diameter Grille Rod - mill	0.50 / ft	0.25 / ft
10_24 Hex M Screw Nut Zinc	MSN1024-Z		1024 Hex M Screw Nut Zinc	0.03 / PC	0.01 / PC
10_24 PH Flat M Screw ZP	PFM1024-1Z		10_24 PH Flat M Screw ZP	0.08 / PC	0.02 / PC
10-12 Phil Pan Sheet Metal Screw	470717-00	tpp019A0075SS	10-12 x 3/4" Phil Pan Sheet Metal Screw - Ext. bar Screws / Universal mount scr	8.67 / box100	0.26 / box100
10-12 Phil Pan Sheet Metal Screw FL	470717-00	tpp019A0075SS	10-12 x 3/4" Phil Pan Sheet Metal Screw - Ext. bar Screws / Universal mount scr	8.67 / box100	0.26 / box100
110207113909000601200002Q	164032-00	- 6301022	Wind Remote with Sensor (Eolis)	207.63 / Piece	61.58 / Piece
12"x12" Slat & Guiderail Sample			12" x 12" Slat & Guiderail Sample	5.00 / PC	5.00 / PC
15 Channel LCD Display Remote	EL03-17		15 Channel LCD Display Remote (hand held)	200.00 / PC	120.00 / PC
16 Ch. Remote Transmitter	164029-00		16 Channel LCD Remote Transmitter -	220.00 / Piece	96.80 / Piece
16 Ch. Remote Transmitter FL	164029-00		16 Channel LCD Remote Transmitter	220.00 / Piece	96.80 / Piece
2.15_NEW_Pricematrix_CHD2_Batt			Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD2_Strap			Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD2_Switch			Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_1/2 Gric			Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_1/2 Gric			Sales price matrix for following configuration:	see price matrix	see price matrix

[Order confirmation 04232012/00071] Select and insert item

By using an item item, you save yourself the task of entering texts and prices and only the number must thus be added. Another advantage of item items is that they provide the possibility to control stock and to post stock movements. With given necessity, you easily receive an overview of the supplies.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w	156000-01	Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi	PL_SH_SH	Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor 506 S2	160550-00	Motor 506 S2	3.00			238.60	238.60	715.80	0.00	715.80


Footer text

PP [USD] 406.66 Before CM = 11429 USD 2811% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 12,016.10 After CM = 11429 USD 2811% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 12,016.10

[Order confirmation 04232012/00071]

Multi items

A multi item contains a service item that is needed in different dimensions. The item becomes selected according to "Items- new multi-items" with the matchcode or the item search . Afterwards the respective number of the single dimensions is collected in a template.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w	156000-01	Cone Stopper - white	4.00	0.91	0.91	3.64	0.00	3.64
002	Superior Hi	PL_SH_SH	Security Rolling Shutter	1.00	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor S06 S2	160550-00	Motor S06 S2	3.00	238.60	238.60	715.80	0.00	715.80

Multi item

Items little_big*

Measurement [Little_Big_T_awning]

Name	Value
Comments	10
Projection	4 ft. 11 inch
Fabric_Brand	Dickson
Fabric_Style	Sunrise
Vario_volant	
Valance	Germany
Framecolor	brown
Control	gear
Controlside	left
Cranksize	4 ft. 7 inch
Mounting	wall

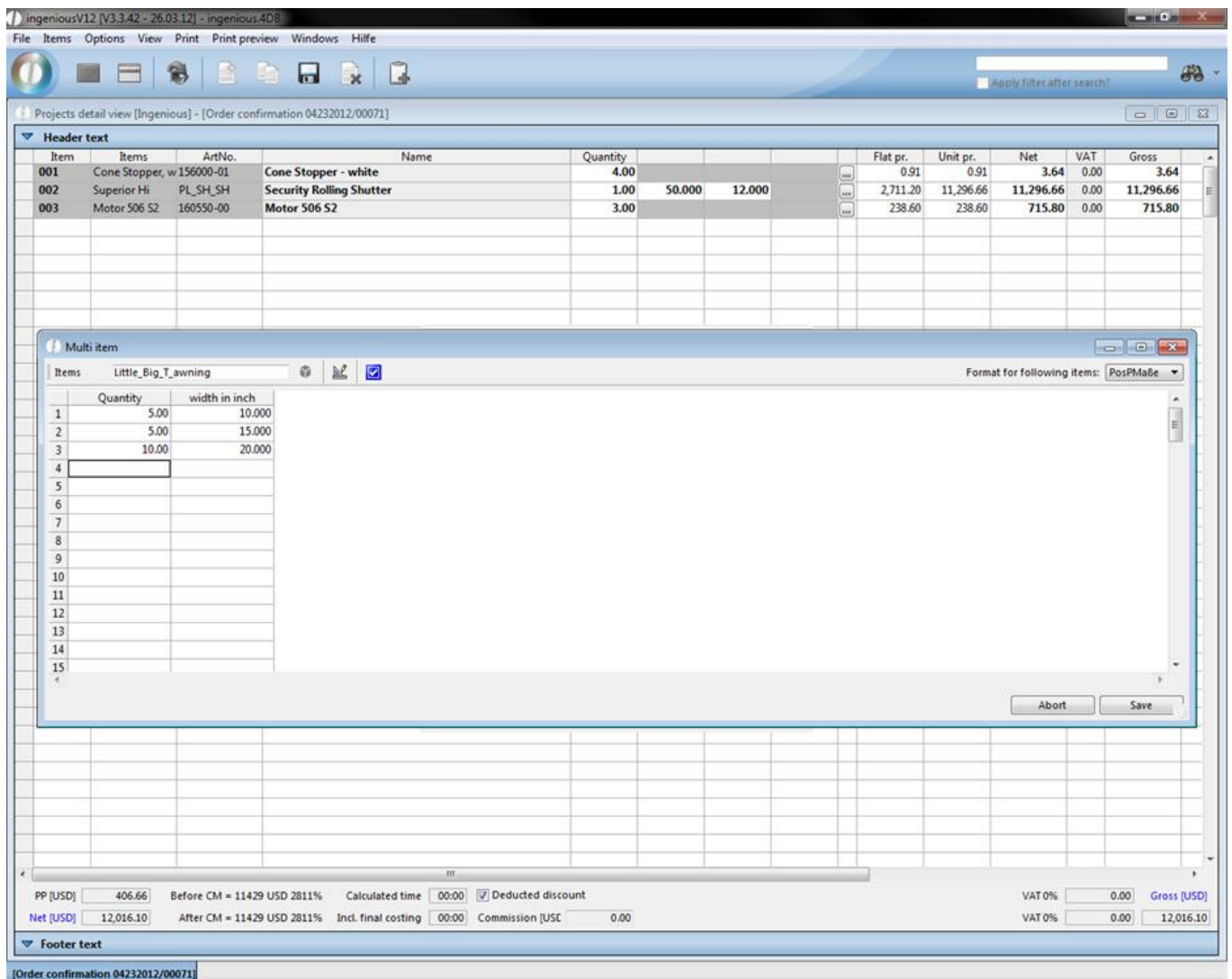
Format for following items: PosMaße

PP [USD] 406.66 Before CM = 11429 USD 2811% Calculated time 00:00 Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 12,016.10 After CM = 11429 USD 2811% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 12,016.10

Footer text

[Order confirmation 04232012/00071]



Ingenious.V12 inserts the item in the project document exactly as often as different measurements were given. In the printed document, the item appears only once with its description and the following items contain only the dimensions.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w	156000-01	Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi	PL_SH_SH	Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor S06 S2	160550-00	Motor S06 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

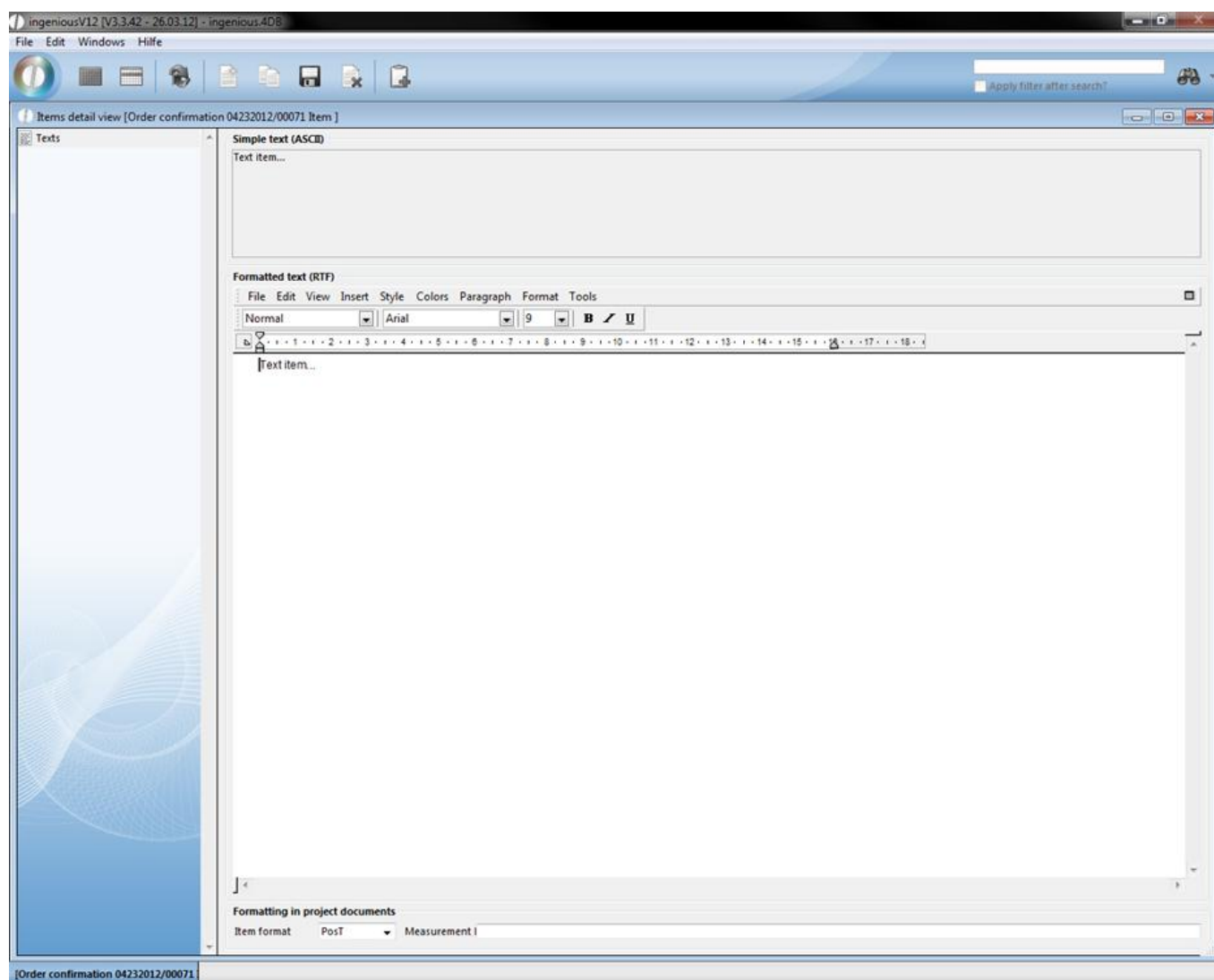
Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

Text item

Additional explanations or tips can be entered into a text item. Go to the place in the document where the text should be inserted and choose "Items - new text item".



ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor 506 S2 160550-00		Motor 506 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Text item...								

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

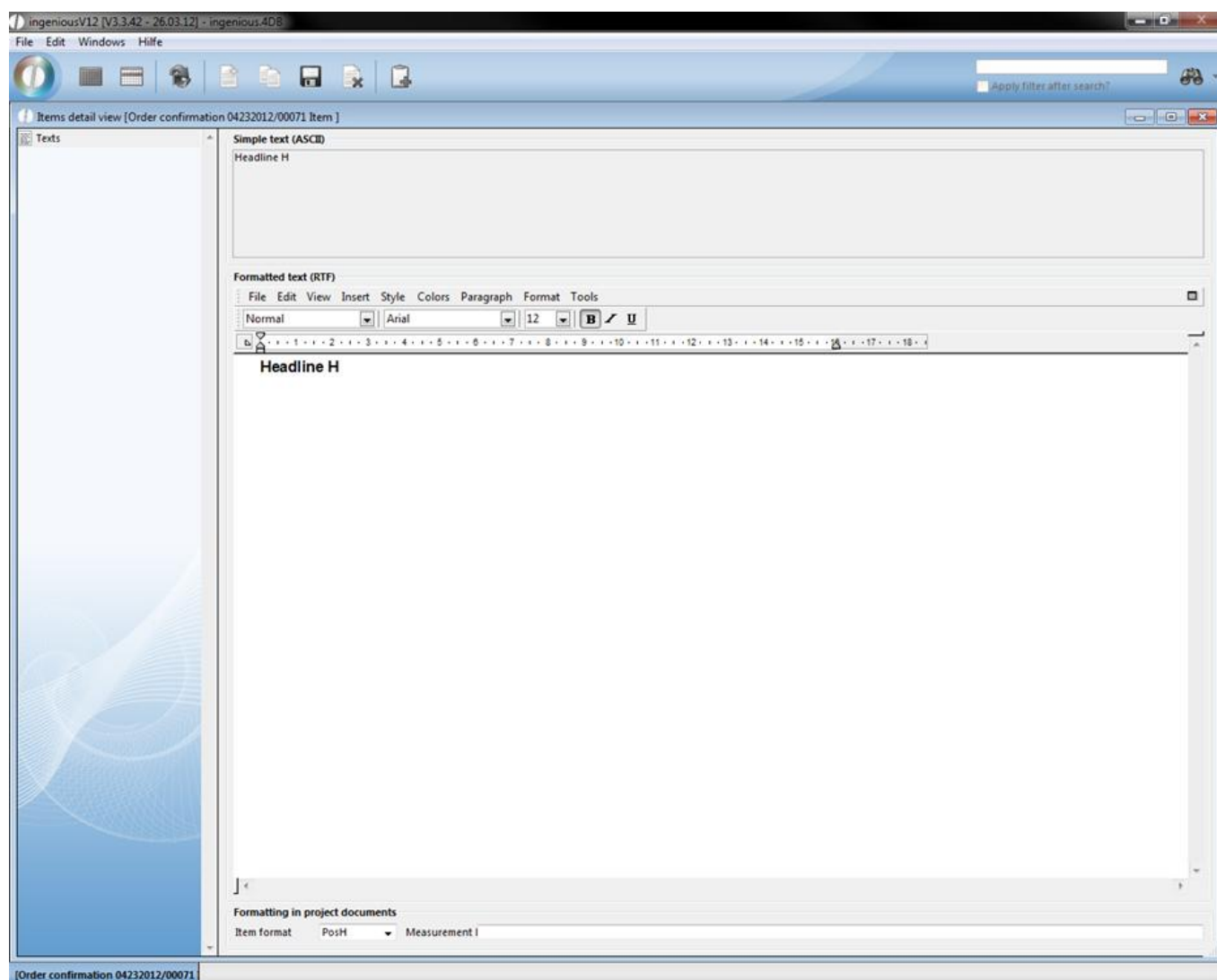
Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

Heading

In order to create your document more clearly, you can work with headings (Menu: Positions - New heading). You can insert and edit these like a text item.



ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor S06 S2 160550-00		Motor S06 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Text item...								
			Headline H								

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

Rebate item

You can grant a rebate on single or several items, or on the whole order value. Pay attention to the fact that you insert the rebate item in each case directly under the line from which the price value should be drawn. If for example a text item stands between both items, no rebate can be calculated because in this line no price is included. With rebates of an item, you enter the rebate item directly underneath. Should several or all items be discounted, the sum must be determined beforehand.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor S06 S2 160550-00		Motor S06 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50

Rebate item...

Rebate in % 10

Abort OK

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
003	Motor S06 S2 160550-00		Motor S06 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Rebate 10%						-2,896.35		-2,896.35

Footer text

PP [USD] 29,080.42 Before CM = 36961 USD 127% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 67,046.75 After CM = 36961 USD 127% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 67,046.75

[Order confirmation 04232012/00071]

Subtotal

The subtotal (Menu: Items - New subtotal shows the whole price of several items in a category, i.e., divided by headings. A subtotal counts the fixed values together, up to the next existing subtotal, or if no other one exists, up to the first item.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w	156000-01	Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi	PL_SH_SH	Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
			Subtotal						11,300.30		11,300.30
003	Motor 506 S2	160550-00	Motor 506 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn	PL_AW_BT	Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Subtotal						58,642.80		58,642.80

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

Running sum

The continuous sum (Menu: Items - New running sum) determines the total value of all of its existing items, no matter whether divided by subtotals or not.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
			Subtotal						11,300.30		11,300.30
003	Motor 506 S2 160550-00		Motor 506 S2	3.00			238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Subtotal						58,642.80		58,642.80
			Running sum						69,943.10		69,943.10

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

Footer text

[Order confirmation 04232012/00071]

Copy and paste items

The shortcuts Strg + Shift + C and Strg + Shift + V will help you to copy and paste (multiple) items. You can also execute this commands by using the menu "items".

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.40B

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66
			Subtotal					11,300.30		11,300.30
003	Motor 506 S2 160550-00		Motor 506 S2	3.00		238.60	238.60	715.80	0.00	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50
			Subtotal					58,642.80		58,642.80
			Running sum					69,943.10		69,943.10

Footer text

PP [USD] 29,080.42 Before CM = 39814 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,943.10 After CM = 39814 USD 137% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,943.10

[Order confirmation 04232012/00071]

Example – selected items

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04232012/00071]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	11,296.66
			Subtotal					11,300.30		11,300.30
003	Motor 506 S2 160550-00		Motor 506 S2	3.00			238.60	238.60	715.80	715.80
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	14,481.75
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	14,481.75
006	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	28,963.50
			Subtotal					58,642.80		58,642.80
			Running sum					69,943.10		69,943.10
007	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	14,481.75
008	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	14,481.75
009	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	28,963.50

Footer text

PP [USD] 57,754.18 Before CM = 68198 USD 118% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 127,870.10 After CM = 68198 USD 118% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 127,870.10

[Order confirmation 04232012/00071]

Example after paste the items

Original item

items that should not be included in the sums because they are perhaps only needed or recommended by you, but are not wished by the contact expressly, are shown as optional items, and indicated by the item number "O". On the printed quotation, this is shown in cursive and with the "Option" script. In the project, this item appears green.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000 12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
003	Motor 506 S2 160550-00		Motor 506 S2	3.00		238.60	238.60	715.80	0.00	715.80	313.
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
005.01	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

PP [USD] 14,743.54 Before CM = 25621 USD 174% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 40,979.60 After CM = 25621 USD 174% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 40,979.60

Footer text

[Quotation 04232012/00047]

Alternative item

In order to offer the possibility to the customer to choose between different items, you can work with alternative items. After the first possibility, you enter several other items and then in "Items", select "Item is alternative item". This item is shown in the project in blue and on the printed document in italics. The item sum does not go into subtotals, continuous totals or total sums. In the item number "A" indicates the alternative item.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.ADB

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	Cone Stopper, w156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
003	Motor 506 S2 160550-00		Motor 506 S2	3.00		238.60	238.60	715.80	0.00	715.80	313.
004	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
005	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
005.A1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

PP [USD] 14,743.54 Before CM = 25621 USD 174% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 40,979.60 After CM = 25621 USD 174% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 40,979.60

Footer text

[Quotation 04232012/00047]

Post calculation item

In some projects, additional goods are used because of false dimensions and cannot be billed to the customer. These items should still be assigned to the project in order to be able to issue correct reports. In the project, enter the item and under the menu "Items", choose the option "Post calculation item". The item is highlighted in red and the profit figures are corrected around this value. The total purchase price increases by the value of the additional item whereas the total sales sum keeps the original order value. Because the mistake is not the customer's fault, the additional expense is not billed to them.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Apply filter after search?

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	Cone Stopper, w 156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64	1.
002	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
002.N1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
			Running sum						11,300.30		11,300.30	93.

PP [USD] 93.07 Before CM = 11038 USD 11860% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 11,300.30 After CM = -3299 USD -3545% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 11,300.30

Footer text

[Quotation 04232012/00047]

Deleting items

You can delete incorrectly entered or no longer required items by marking the selection, "Delete marked items" under the menu "Items". In order to prevent an inadvertent removal, one more security query appears. Please confirm by clicking on "OK" in order to finally delete the item.

Manual item numbers

In Ingenious.V12 sequential item numbers will automatically be assigned to the projects. However, you also have the possibility to change this numerical order according to your own pattern. In the menu, select "Options" and click on "Manual item numbers". The first grey item numbers provided will be unlocked and provided in white. You can then insert your individual numbering in the respective field, for example for service directories.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

▼ Header text

Item	Items	Name	Quantity			Net	SP conv.	Time min.	Com. rate	Com. amount	Project
1	Cone Stopper, w	Cone Stopper - white	4.00				3.64		0.00	0.00	0.00
2	Superior Hi	Security Rolling Shutter	1.00	50.000	12.000	11,296.66		0.00	0.00	0.00	
	Little_Big_T_awn	Retractable awning type "little big t"	10.00	20.000		28,963.50		0.00	0.00	0.00	
3.1	Little_Big_T_awn	Retractable awning type "little big t"	5.00	10.000		14,481.75		0.00	0.00	0.00	
3.2	Little_Big_T_awn	Retractable awning type "little big t"	5.00	15.000		14,481.75		0.00	0.00	0.00	
3.3	Little_Big_T_awn	Retractable awning type "little big t"	10.00	20.000		28,963.50		0.00	0.00	0.00	

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

▼ Footer text

[Quotation 04232012/00047]

Rearrange items

Additionally you are able to rearrange items and change their presentation on printing (PosP = all item features will be displayed; PosPMaße = only the item measurements will be displayed). Just select "Rearrange items" in the menu "Options". A window will open up, where you can move the items by drag and drop.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w 156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000 12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
			Running sum					11,300.30		11,300.30	93.
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

Items

Rearrange items

Pos	Items	Description	Item number	Order number	Format
1	Cone Stopper, white	Cone Stopper - white	156000-01	891040100	PosP
2	Superior Hi	Security Rolling Shutter	PL_SH_SH		PosP
-	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		
3.1	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosP
3.2	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosPMaße
3.3	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosP

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

[Quotation 04232012/00047]

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
1	Cone Stopper, w 156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000 12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

[Quotation 04232012/00047]

To change the display form for the print, reopen the rearrange items window and do a double click in the format column of the desired item.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
1	Cone Stopper, w 156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

Items

Rearrange items

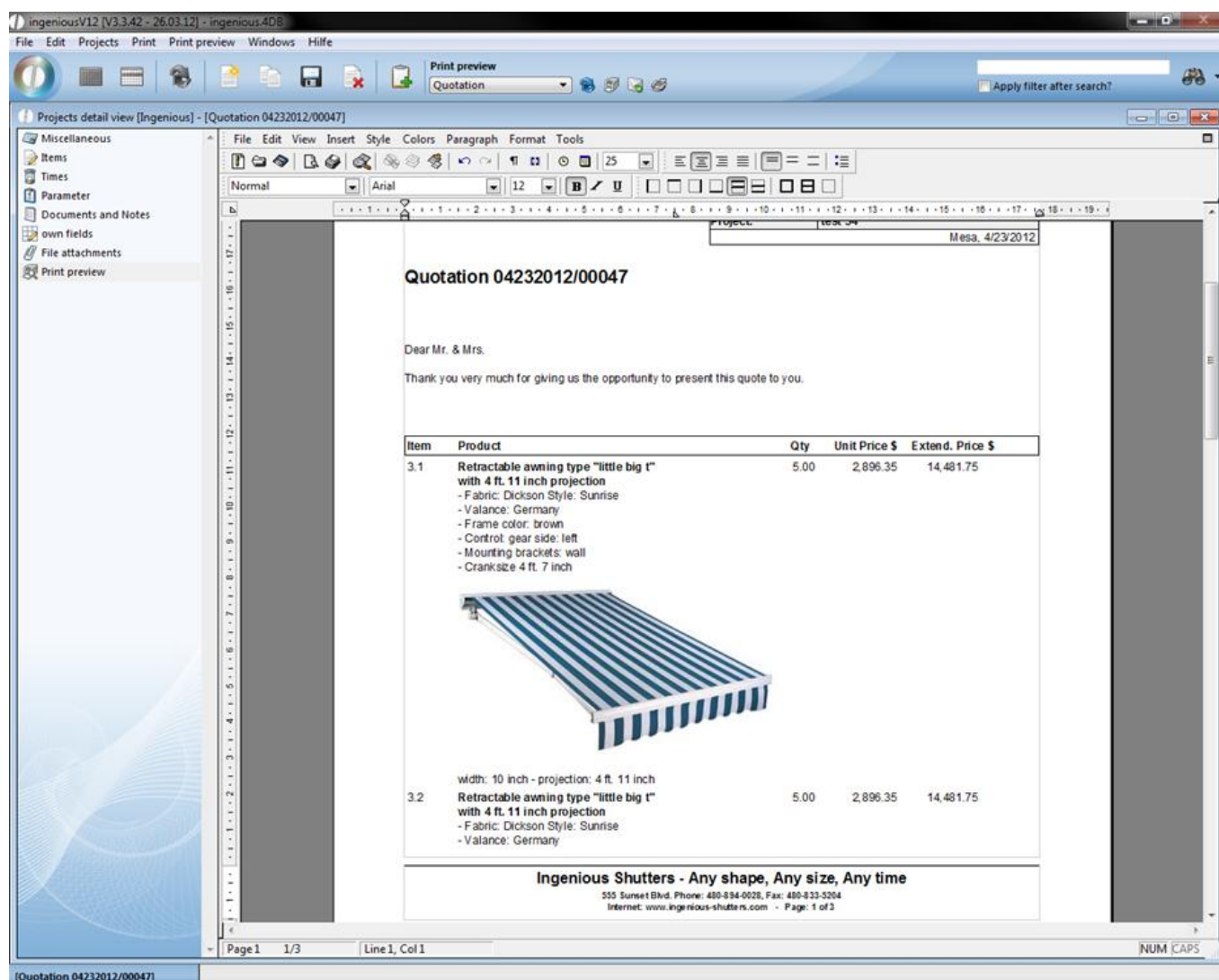
Pos	Items	Description	Item number	Order number	Format
3.1	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosPMaBe
3.2	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosPMaBe
3.3	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		PosPMaBe
1	Cone Stopper, white	Cone Stopper - white	156000-01	891040100	PosP
2	Superior Hi	Security Rolling Shutter	PL_SH_SH		PosP
-	Little_Big_T_awning	Retractable awning type "little big t"	PL_AW_BT		

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

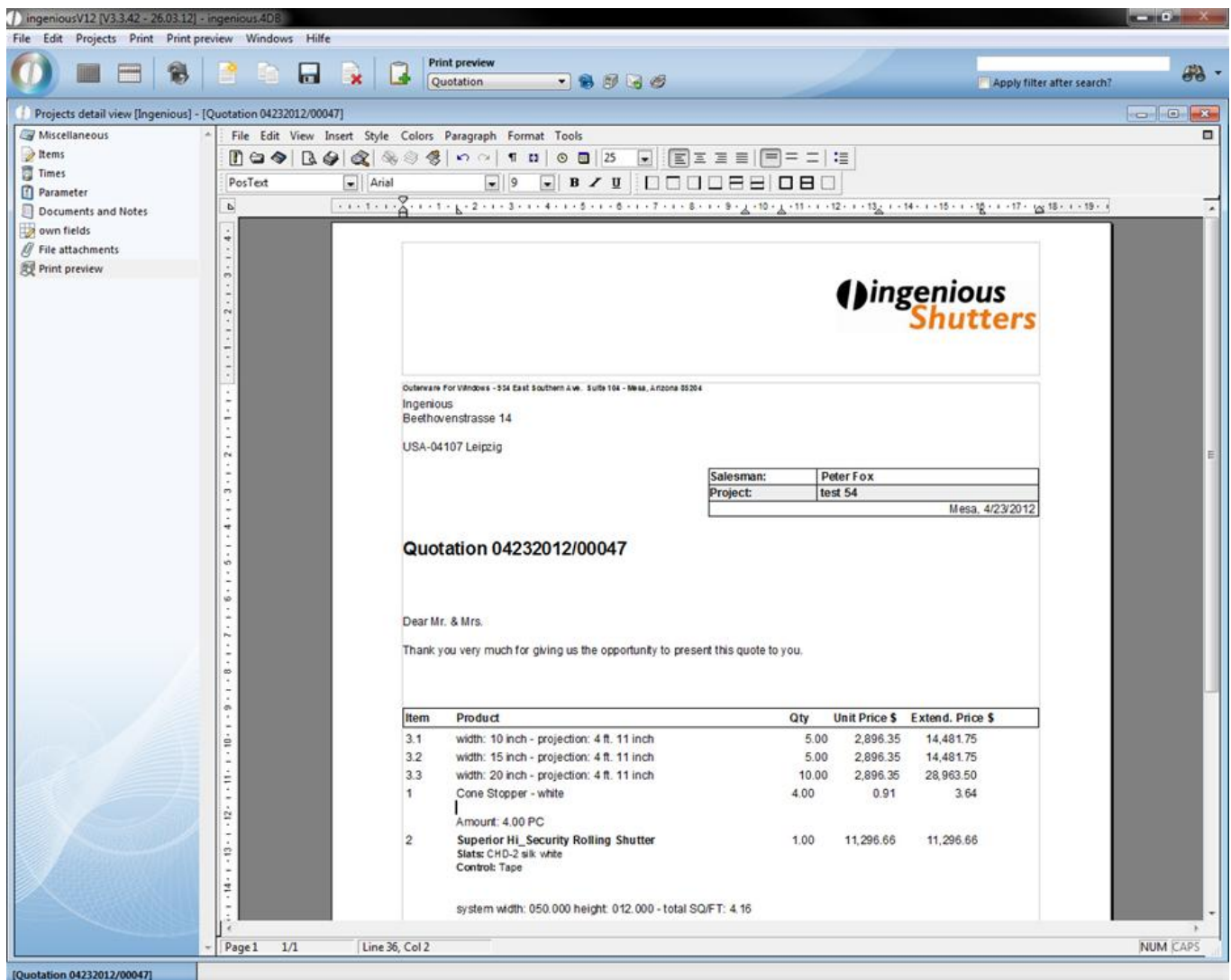
Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

[Quotation 04232012/00047]



Preview of the item printout with PosP



Preview of the item printout with PosMaße

Editing measurement data

In the item view the measurement data of several of the same items can be changed all at once (practically by change / adaptation of multi items). In addition, only the desired items must be marked and the item, "Edit measurement data" in the "Options" menu, is selected. The measurement window of the first highlighted item opens. Here, the desired data can be changed and confirmed. The change is automatically transferred for all highlighted items.

The screenshot displays the 'ingenious.V12' software interface. The main window shows a 'Projects detail view [Ingenious] - [Quotation 04232012/00047]'. A table lists items with columns for Item, Items, ArtNo., Name, Quantity, width in inch, Flat pr., Unit pr., Net, VAT, Gross, and PP. A modal window titled 'Measurement [Little_Big_T_awning]' is open, showing a list of measurements and their values. The 'Fabric_Style' measurement is highlighted in red.

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000 12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

Name	Value
Comments	10
Projection	4 ft. 11 inch
Fabric_Brand	Dickson
Fabric_Style	Sunrise
Vario_volant	No
Valance	Germany
Framecolor	brown
Control	gear
Controlside	left
Cranksizes	4 ft. 7 inch
Mounting	wall

At the bottom of the window, there are summary fields: PP [USD] 28,766.83, Before CM = 39422 USD 137%, Calculated time 00:00, Deducted discount, Net [USD] 69,227.30, After CM = 25085 USD 87%, Incl. final costing 00:00, Commission [USD] 0.00, VAT 0% 0.00, Gross [USD] 69,227.30.

Freeze sales price

When you freeze the sales price of items, the total price of the item remains constant, even if measurement, quantity, etc. are changed. Just select the desired items and click in the menu "options" on "freeze sales prices". Now when you change the measurements of the item only the purchase price will be recalculate. Items with fixed sales prices have got light grey colored sales price columns. To rescind the fixation, you only have to click on the menu item "Options – freeze sales prices" again.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity	width in inch	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w156000-01		Cone Stopper - white	4.00		0.91	0.91	3.64	0.00	3.64	1.
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000 12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91.
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168.
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336.

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

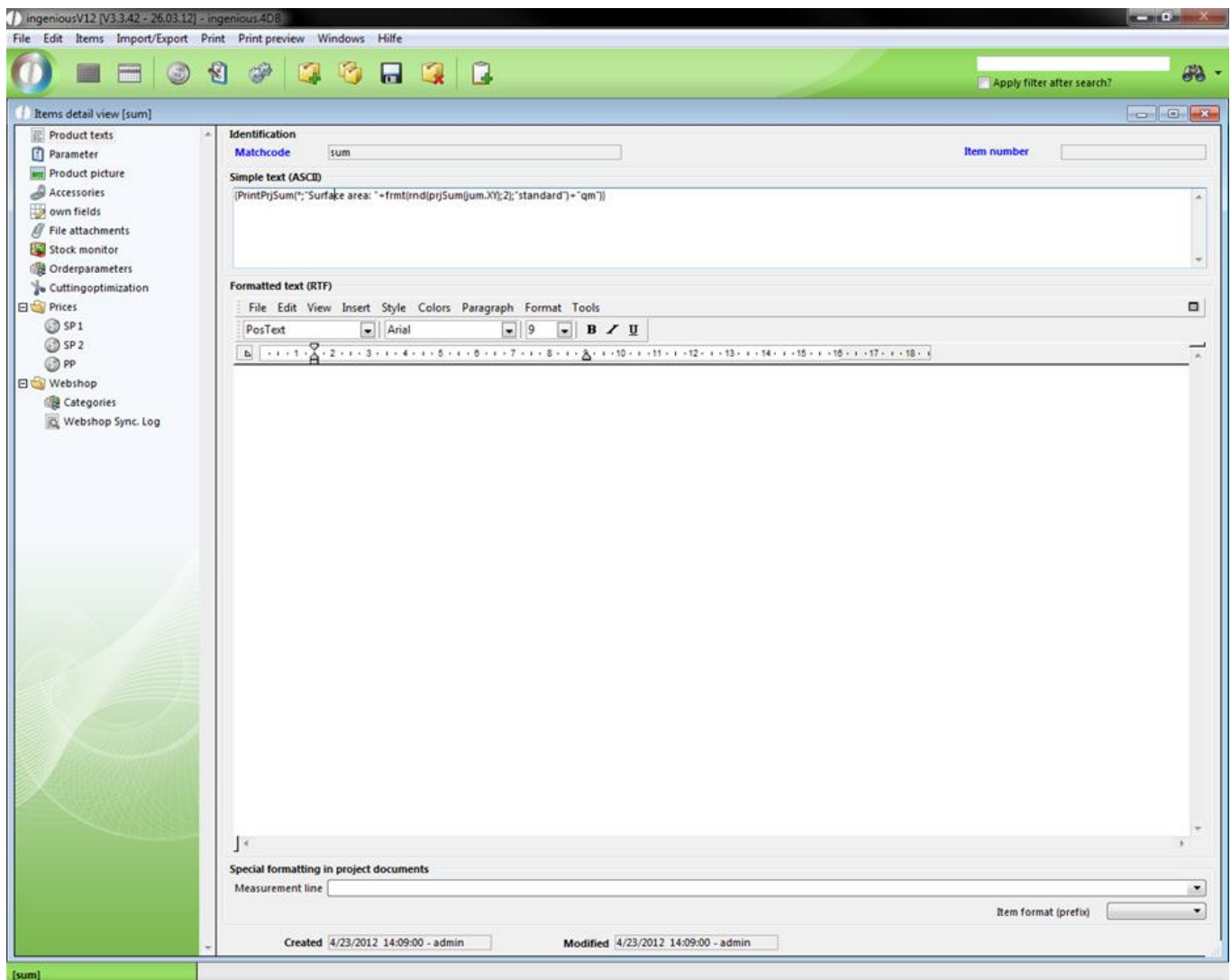
Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

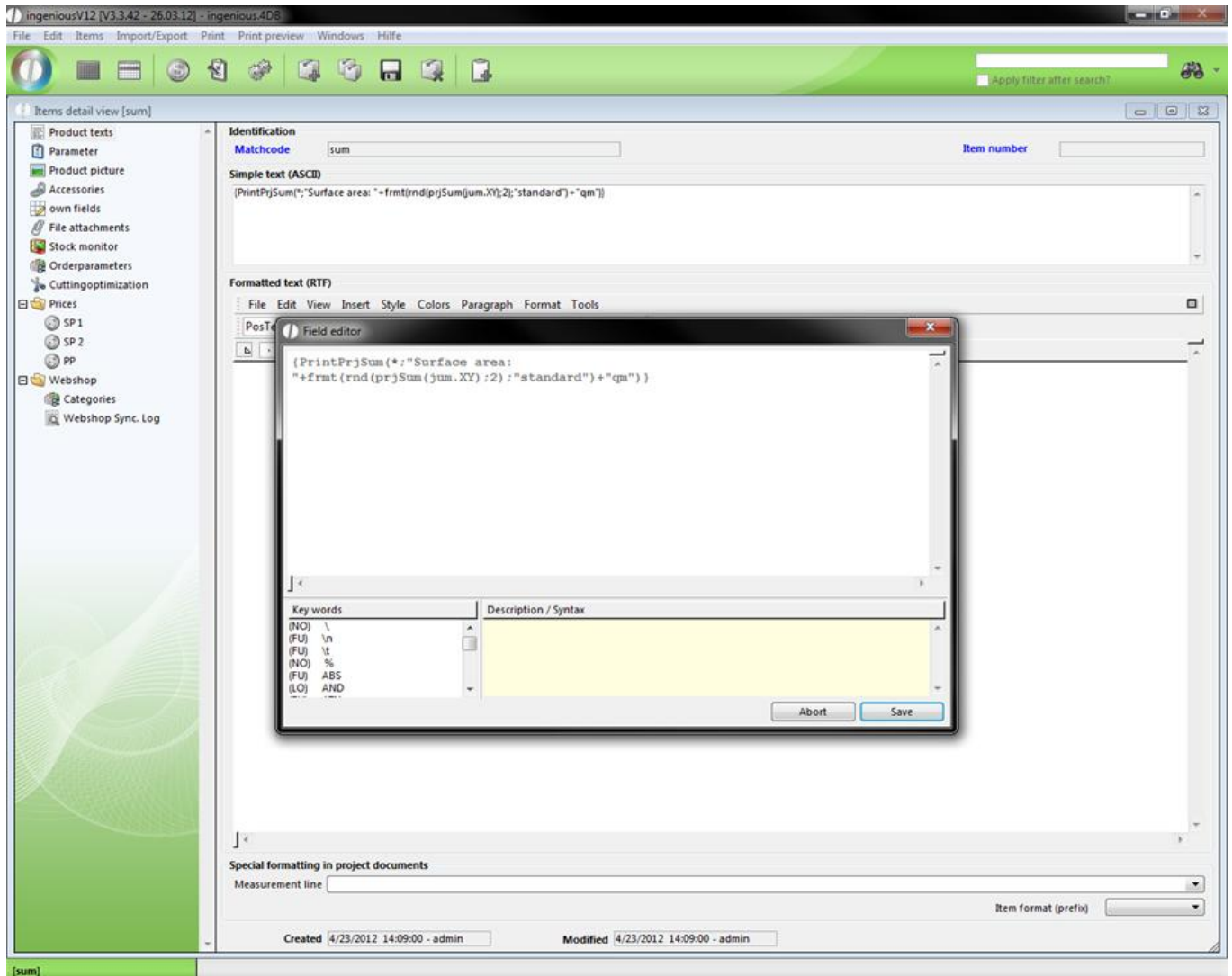
[Quotation 04232012/00047]

PrintPrjSum

The PrintPrjSum function allows a sum evaluation of several positions all at once. For this, only one item has to be created in which the item description, PrintPrjSum with the desired calculation format occurs.



You will find different calculation formats as examples in the field editor (\uparrow + F2).



Then in the position view a sum line can be inserted above the item.

Example:

The surface area of all positions should be calculated. In addition, an item is created at first, for instance, with the matchcode "Sum". Next, one enters the desired calculation formats in the field,

"Simple Text (ASCII)":

```
{PrintPrjSum(*: "Surface area: " + frmt(rnd(prjSum(jum.XY);2); "standard") + " qm")}
```

(calculate all items and round the surface areas and lay them out with two decimal places in the form of the surface area:0.00 sqm)

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w 156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64	1
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
			Surface area: 4.17qm									

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

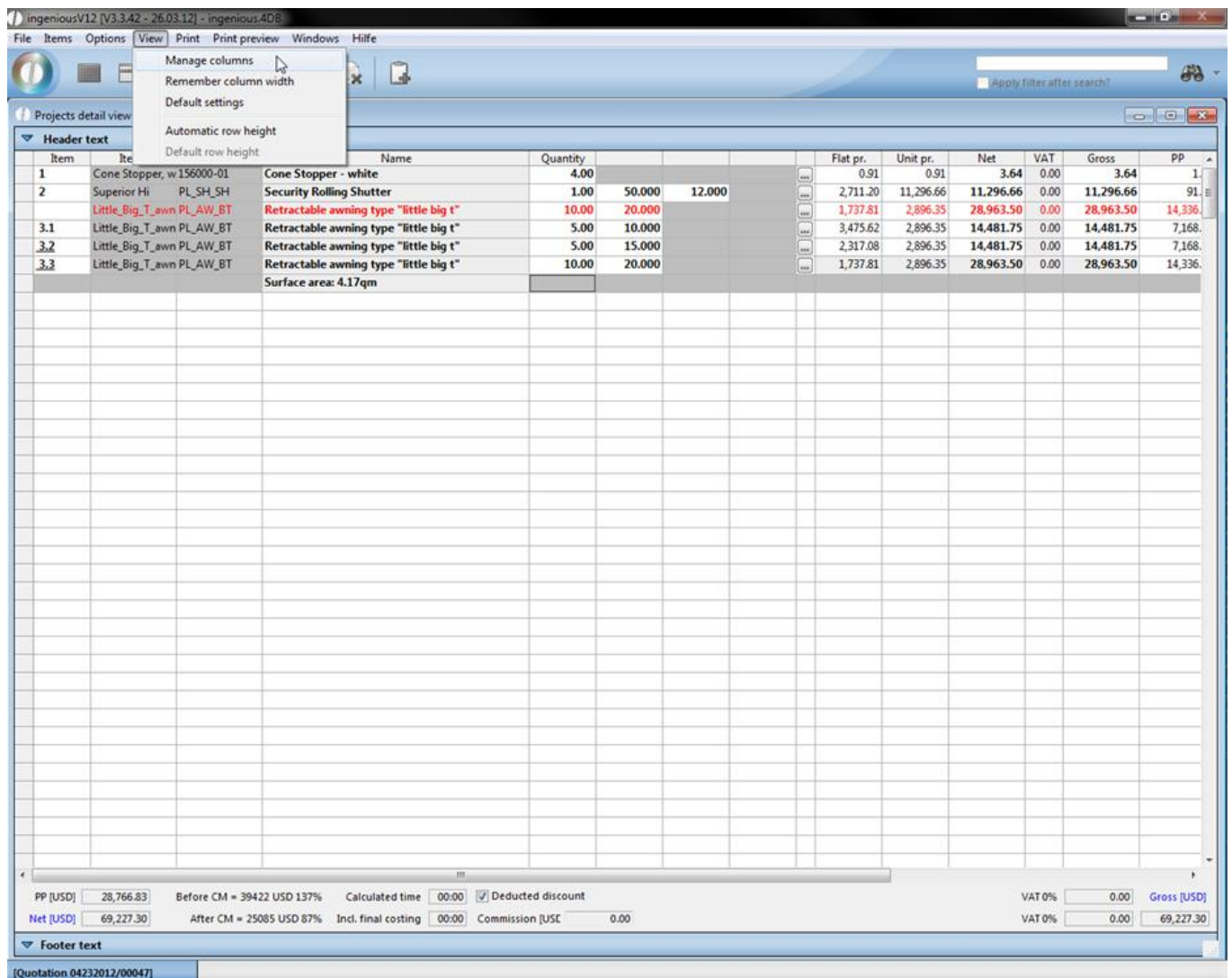
Footer text

[Quotation 04232012/00047]

The formatting of PrintPrjSum can be changed with the text module management with the configuration of the system module Post.

Change table view

You can confirm the layout of the table view with the "View" menu.



ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.40B

File Items Options View Print Print preview Windows Hilfe

Manage columns
Remember column width
Default settings
Automatic row height
Default row height

Projects detail view

Header text

Item	Item	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w 156000-01	Cone Stopper - white	4.00	0.91	0.91	3.64	0.00	3.64	1
2	Superior Hi PL_SH_SH	Security Rolling Shutter	1.00	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91
	Little_Big_T_awn PL_AW_BT	Retractable awning type "little big t"	10.00	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
3.1	Little_Big_T_awn PL_AW_BT	Retractable awning type "little big t"	5.00	3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168
3.2	Little_Big_T_awn PL_AW_BT	Retractable awning type "little big t"	5.00	2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168
3.3	Little_Big_T_awn PL_AW_BT	Retractable awning type "little big t"	10.00	1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
		Surface area: 4.17qm							

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

[Quotation 04232012/00047]

If you click on the function "Administer columns", a window opens in which you hide and unhide the desired columns with a mouse click. If you hide the columns for the flat price and unit price, these are no longer illustrated in the item view.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Ingenious] - [Quotation 04232012/00047]

Header text

Item	Items	ArtNo.	Name	Quantity			Flat pr.	Unit pr.	Net	VAT	Gross	PP
1	Cone Stopper, w 156000-01		Cone Stopper - white	4.00			0.91	0.91	3.64	0.00	3.64	1
2	Superior Hi PL_SH_SH		Security Rolling Shutter	1.00	50.000	12.000	2,711.20	11,296.66	11,296.66	0.00	11,296.66	91
	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
3.1	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	10.000		3,475.62	2,896.35	14,481.75	0.00	14,481.75	7,168
3.2	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	5.00	15.000		2,317.08	2,896.35	14,481.75	0.00	14,481.75	7,168
3.3	Little_Big_T_awn PL_AW_BT		Retractable awning type "little big t"	10.00	20.000		1,737.81	2,896.35	28,963.50	0.00	28,963.50	14,336
			Surface area: 4.17qm									

Items

Show/Hide columns

- ☒ Item
- ☒ Cust Item
- ☒ Item Matchcode
- ☒ Item number
- ☒ Name
- ☒ Quantity
- ☒ Width X
- ☒ Height Y
- ☒ Depth Z
- ☒ Key - Recalculation
- ☒ Flat price
- ☒ Unit price
- ☒ Net
- ☒ VAT

Abort OK

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

Footer text

[Quotation 04232012/00047]

Item	Items	Name	Quantity		Net	SP conv.	Time min.	Com. rate	Com. amount	Project
1	Cone Stopper, w	Cone Stopper - white	4.00			3.64	0.00	0.00	0.00	
2	Superior Hi	Security Rolling Shutter	1.00	50.000	12.000	11,296.66	0.00	0.00	0.00	
	Little_Big_T_awn	Retractable awning type "little big t"	10.00	20.000		28,963.50	0.00	0.00	0.00	
3.1	Little_Big_T_awn	Retractable awning type "little big t"	5.00	10.000		14,481.75	0.00	0.00	0.00	
3.2	Little_Big_T_awn	Retractable awning type "little big t"	5.00	15.000		14,481.75	0.00	0.00	0.00	
3.3	Little_Big_T_awn	Retractable awning type "little big t"	10.00	20.000		28,963.50	0.00	0.00	0.00	
		Surface area: 4.17qm								

PP [USD] 28,766.83 Before CM = 39422 USD 137% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]
 Net [USD] 69,227.30 After CM = 25085 USD 87% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 69,227.30

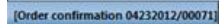
In addition, you have the possibility to adapt the column width to your individual wishes. If you want, for example, the column, "Description" to be broader, then pull this over the column head on the desired size and select the function "Note column view" in the "View" menu. Confirm the appearing dialog window with "Accept". Now the selected column settings are carried over for all projects.

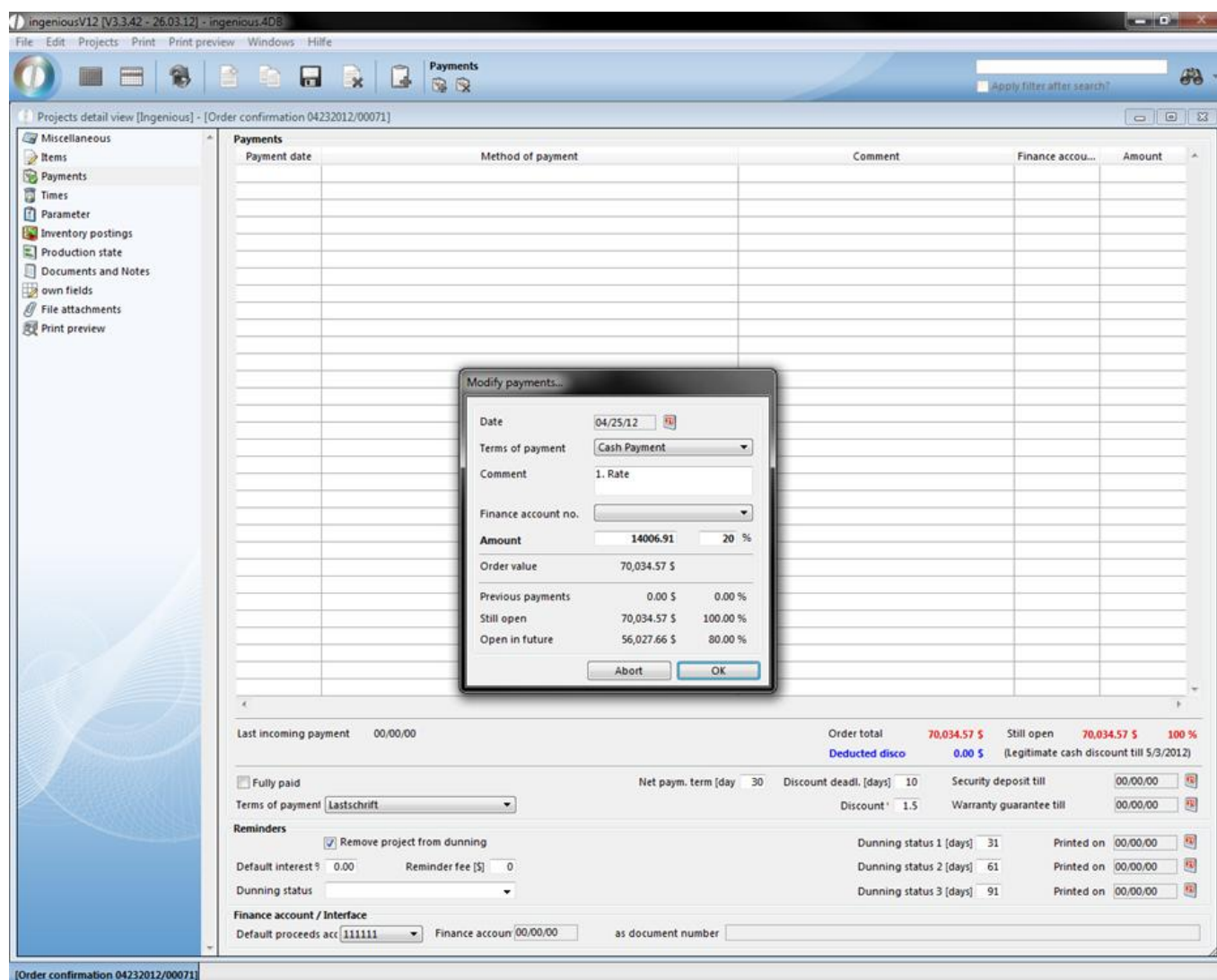
For the setting of the line height there are two possible options: "Automatically adjust line height" leaves a line break within a cell (multi-line cells are possible) and the "Standard line height" corresponds to a line (standard).

Some of the functions in the "Items" column are also retrievable with key combinations. The key combinations are indicated in the menu next according to the function.

3.3.4.3 Payments

The "Payments" detail view is only available in the project documents, order confirmation, invoices and credits. In this column, you can see if and in which amount the customer made payments, or which balance of debt still exists.





[illegible]

In the lower part of the view, you will see the amounts that are still open and the reminder status. If the invoice is completely paid or if only a security deposit is open, then mark the small box "Paid in full". With an indicated security deposit date, you are automatically asked whether this amount is a security deposit. In the field, "Guarantee endorsement to", the date is selected for when the endorsed security deposit should be released through the deed transfer as well as for when it should be reclaimed. The date for the security deposit is then automatically deleted and the amount is marked as open. This amount can then be requested with the normal reminder procedure.

In the field "Terms of payment", you have the choice between different payment options. You can define these payment options in "Program settings" in the column, "Selection lists" with the module entry "Contacts".

Dunnings

In the reminders area, you can setup after how many days the first, second and third reminder is due, and which fees or interest are due.

You can set up all past due invoices in the list view with a few steps in one print run. Select the menu option, "Print/Workflow – Print dunning run & reminders".

The screenshot displays the ingenious.V12 software interface. On the left, a menu is open under the 'Workflow' section, showing options like 'Workflow - Dunning run', 'Workflow - Print project documents', 'Workflow - Mail project documents', and 'Workflow - Convert projects and print'. The main window on the right shows a table with columns: Customer, Telephone, Gross \$, Open \$, and Paifin. The table lists various customers and their associated financial data. The status bar at the bottom indicates '2 Projects [1 / 39 / 60]'.

Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$						
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	70,034.57 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	+49 341 226210	45,043.53 \$						
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		2,263.74 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,097.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		31,329.92 \$						

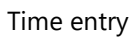
Now select which reminders should be included and how many copies of the document you would like printed on the selected printer.

The screenshot displays the ingenious.V12 software interface. The main window shows a 'Workflow List view' with a table of project documents. The table columns include Project document, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. The table lists various documents such as Quotations, Order confirmations, Invoices, and Part payment invoices, along with their respective dates and amounts.

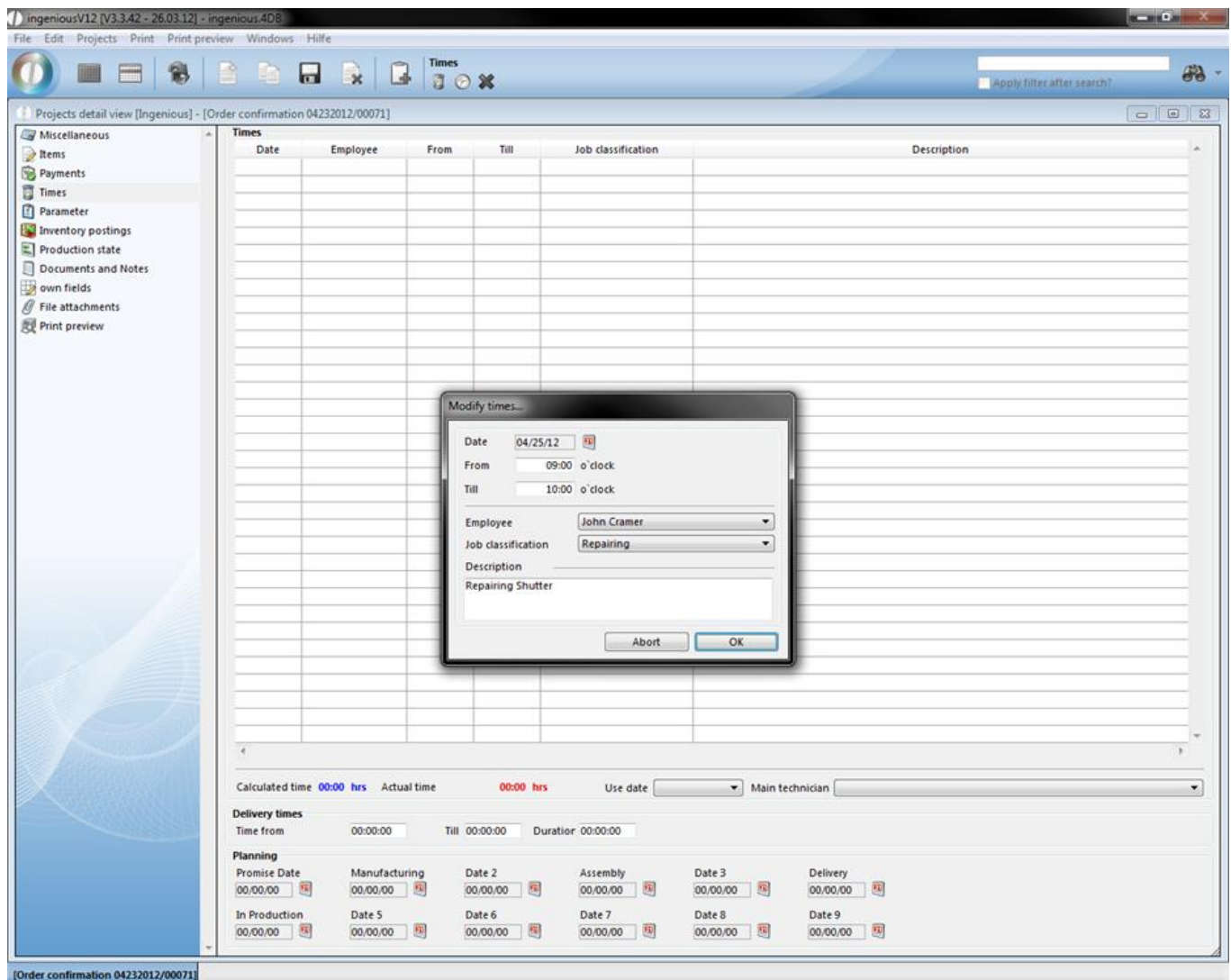
A 'Dunning run...' dialog box is open in the foreground, showing the 'Select dunning levels' section. The dialog includes checkboxes for 'Consider dunning level 1', 'Consider dunning level 2', 'Consider dunning level 3', and 'Consider dunning level 3 again'. The 'Print type' is set to 'Reminders as indiv...', and the 'Output' is set to 'Print documents'. The 'Printer' is set to 'PDFCreator'. The 'No. of copies' is set to 1. The 'Print' button is highlighted.

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation	04232012/00045	04/23/12	test 54	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	32,643.24 \$	0.00 \$					
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		69,227.30 \$	0.00 \$					
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$	0.00 \$					
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	0.00 \$					
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	0.00 \$					
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$	0.00 \$					
Order confirmation	04192012/00069	04/19/12	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$	0.00 \$					
Order confirmation	04192012/00070	04/19/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,049.53 \$	0.00 \$					
Order confirmation	04232012/00071	04/23/12	test 43	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	70,034.57 \$	0.00 \$					
Order confirmation	03232012/00067	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	0.00 \$					
Order confirmation	04022012/00068	03/28/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	0.00 \$					
Order confirmation	03162012/00066	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	0.00 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Invoice	04192012/00041					637.56 \$	0.00 \$					
Invoice	04192012/00042					2,862.00 \$	2,862.00 \$					
Invoice	04232012/00043					13,868.73 \$	13,868.73 \$					
Invoice	04232012/00047					32,643.24 \$	32,643.24 \$					
Invoice	03232012/00039					763.20 \$	763.20 \$					
Invoice	04022012/00040					586,237.84 \$	586,237.84 \$					
Part payment invoice	04232012/00044					18,017.41 \$	18,017.41 \$					

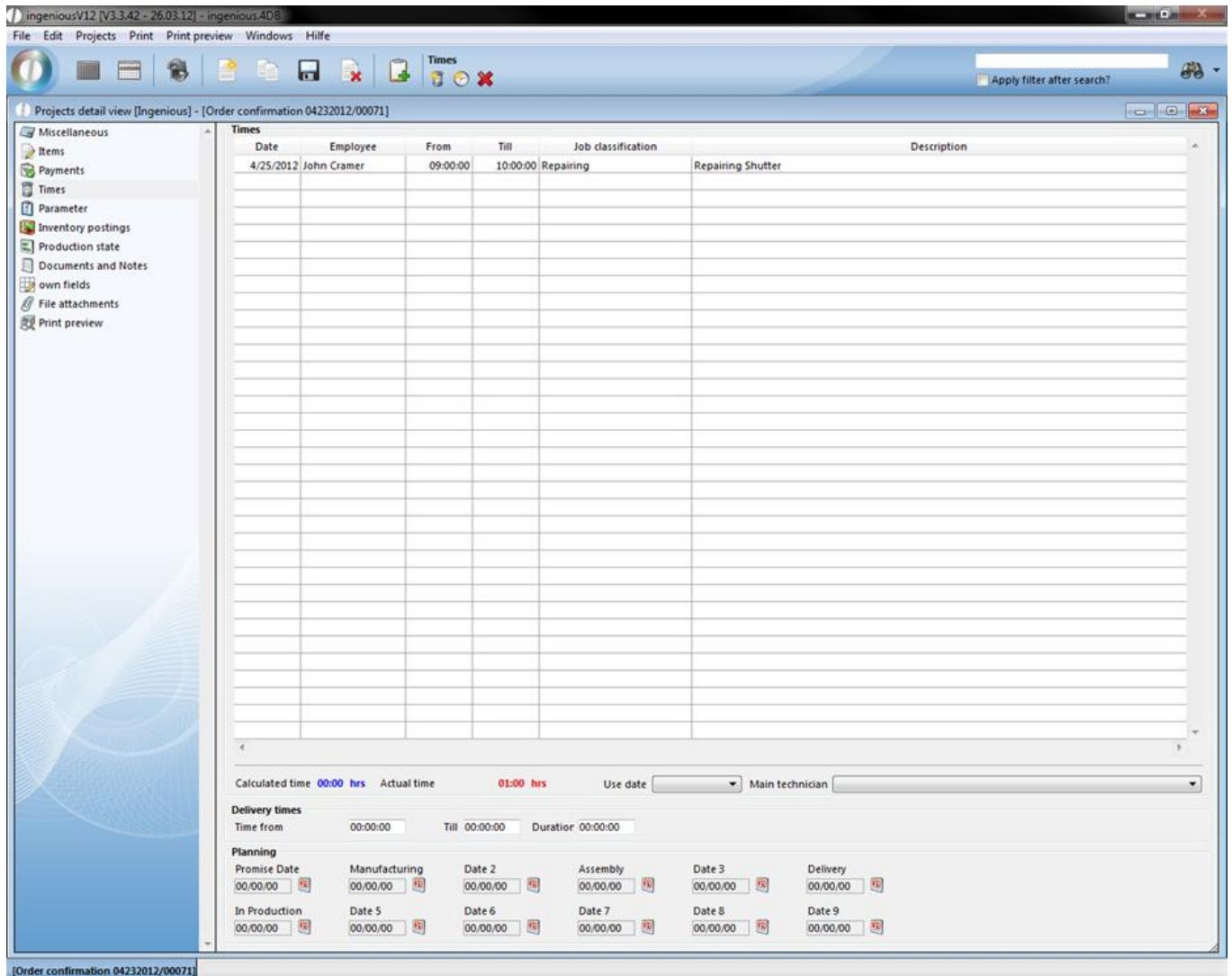
After the reminder run, the current reminder stage and the print date appear in the respective project detail view.



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In the area below, the updated times are shown. The calculated hours and are show in blue and real times are indicated in red. The calculated time is taken from the item positions with a price/time ratio from the project and the real times are entered manually as described above. In the planning, you can insert the announced date for the order progress. By clicking on the icon, a calendar from which you can choose the date opens. Here you enter up to which appointment, i.e. the finished products must be made. These data are recalled among others in the logistics with the setting of trip lists.



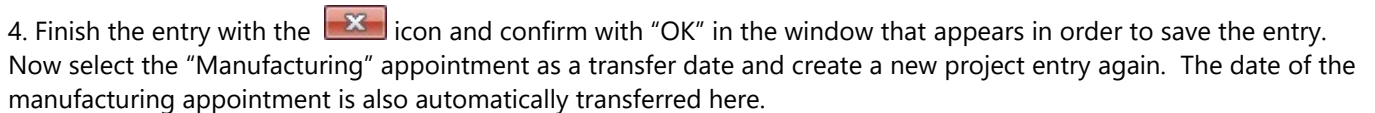
Project time entry with the use date

In the workflow areas (Sales, production, logistics and invoicing) one can create and enter project time entries in different projects (Quotation, confirmation order, invoice, etc.) which are automatically taken into consideration with the time management. Thus it is possible to administer project relevant appointments, such as measurement appointments or assembly appointments, directly through the project. This makes the appointment planning more clear and more flexible.

Practice “Create project time entry with use date”

1. In the sales list view select an invoice by double-clicking.
2. In the project detail view, choose the area "Times". In the field "Use date" select the option "Promise Date" and enter the desired date in promise date in the planning area by clicking on the calendar icon . Now you still select the use date "Manufacturing date" and also confirm it here.





ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Project time Print Print preview Windows Hilfe

Projects detail view [Mrs Sunshine] - [Invoice ID4232012/00047]

Miscellaneous
Items
Payments
Times
Parameter
Documents and Notes
own fields
File attachments
Print preview

Date	Employee	From	Till	Job classification	Description
4/25/2012	admin	08:00:00	10:00:00	Appointment	Text

Project time for:

Resource: User
Employee: admin
Start: 04/27/12 08:00:00
End: 04/27/12 10:00:00
Reminder: No reminder
Title: Mounting
Text: Mounting

linked with: Invoice ID4232012/00047
Billed to: Mrs Sunshine
Status: Not settled
Created: 4/25/2012 12:49:28 - admin
Modified: 4/25/2012 12:49:28 - admin

Calculated time: 00:00 hrs Actual time: 02:00 hrs Use date: Promise Date Main technician:

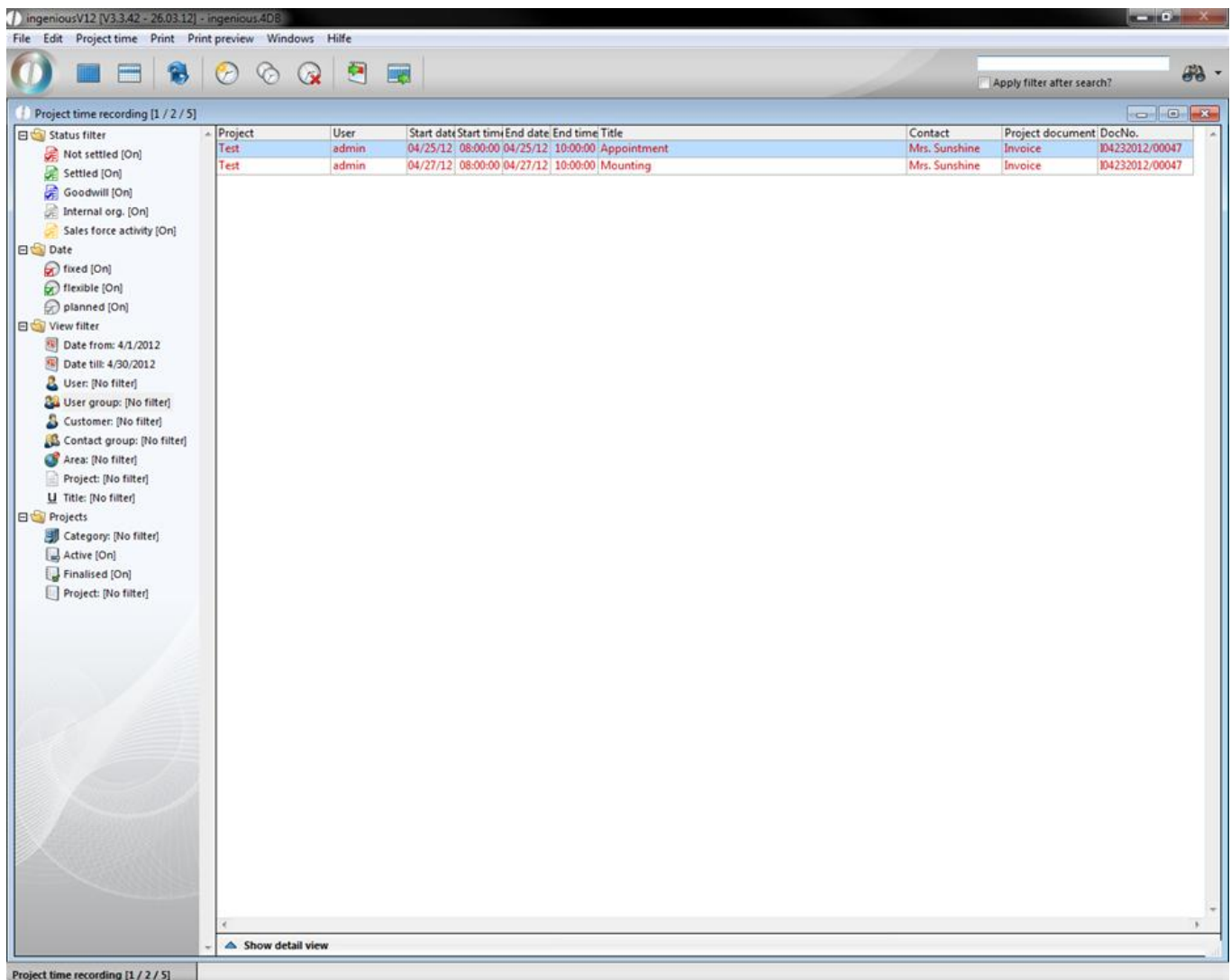
Delivery times
Time from: 00:00:00 Till: 00:00:00 Duration: 00:00:00

Planning

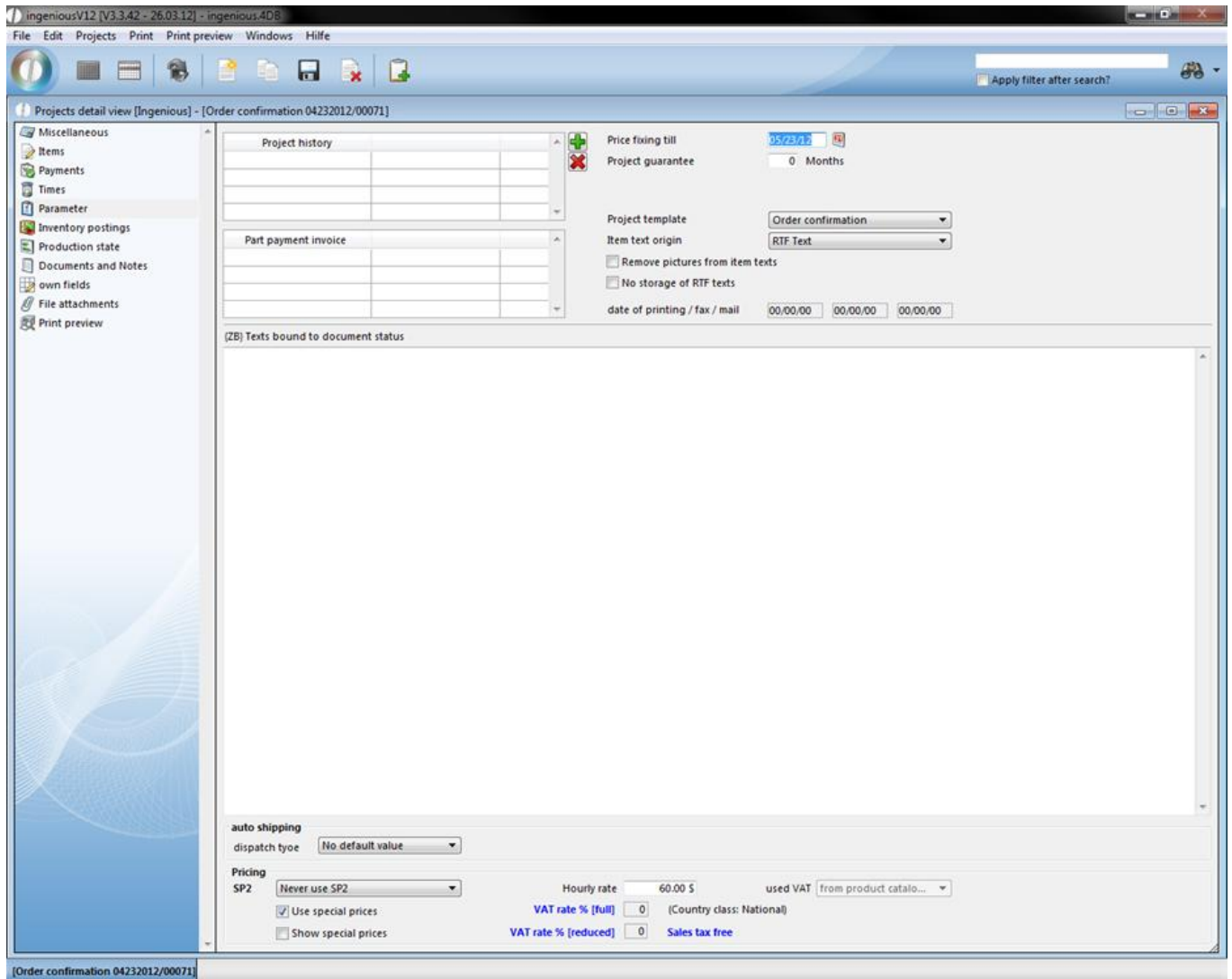
Promise Date 00:00:00	Manufacturing 00:00:00	Date 2 00:00:00	Assembly 00:00:00	Date 3 00:00:00	Delivery 00:00:00
In Production 00:00:00	Date 5 00:00:00	Date 6 00:00:00	Date 7 00:00:00	Date 8 00:00:00	Date 9 00:00:00

Project time Project administration [0 / 1]

5. Save the appointment and leave the project detail view. Now open the administrative tools "Time Management". Here you see the time entries created by you. You have the possibility to edit and manage all appointments created in the projects with the Time Management.



3.3.4.5 Project parameters



Individual project parameters

Project template

In the "Project template" options field, you have the possibility to select one of the standard templates that vary from the project templates from the text management module.

Item text origin

The field "Item text origin" has two options: "ASCII text" and "RTF text". According to the selected text type, "Items of the individual items" of the preset type are released and provided for editing. In the program settings, you can determine in the "Project documents" area, which text type should automatically be specified.

Project history

Are you looking for the contract with the invoice? In the invoice parameters, under "Project history" you find all documents from which this has arisen. For every project, the procedure is documented here. You can directly view all documents listed here from this position. In order to take the fast way to a previous project, double click on the respective project in the document history.

Partial payment invoices

If available, all partial payment invoices are listed here according to the respective project. This way you have an overview which residual value the contract still has.

Pricing


If you would like to grant a special price for a project to a customer, you get to your presetting here. With the pop-up menu, you choose whether the "SP 1" or "SP 2" is used for the project. You select the special prices by clicking in the small box. In addition, in the pricing, the value added tax as well as the hourly rate are entered. If nothing changes in the settings, the data are transferred as they are when creating a contact. In addition, the controlled price and the warranty are put in the parameters and the document templates are set up. The field "Project-status dependent contacts - Action text" takes the notes from the contact for the individual project statistics. If you have given a text for quotations for example, this appears every time if you provide a new quotation. In the print templates, this text appears on the quotation. You can also use the field action text for a free text that is used only for the individual project for example.

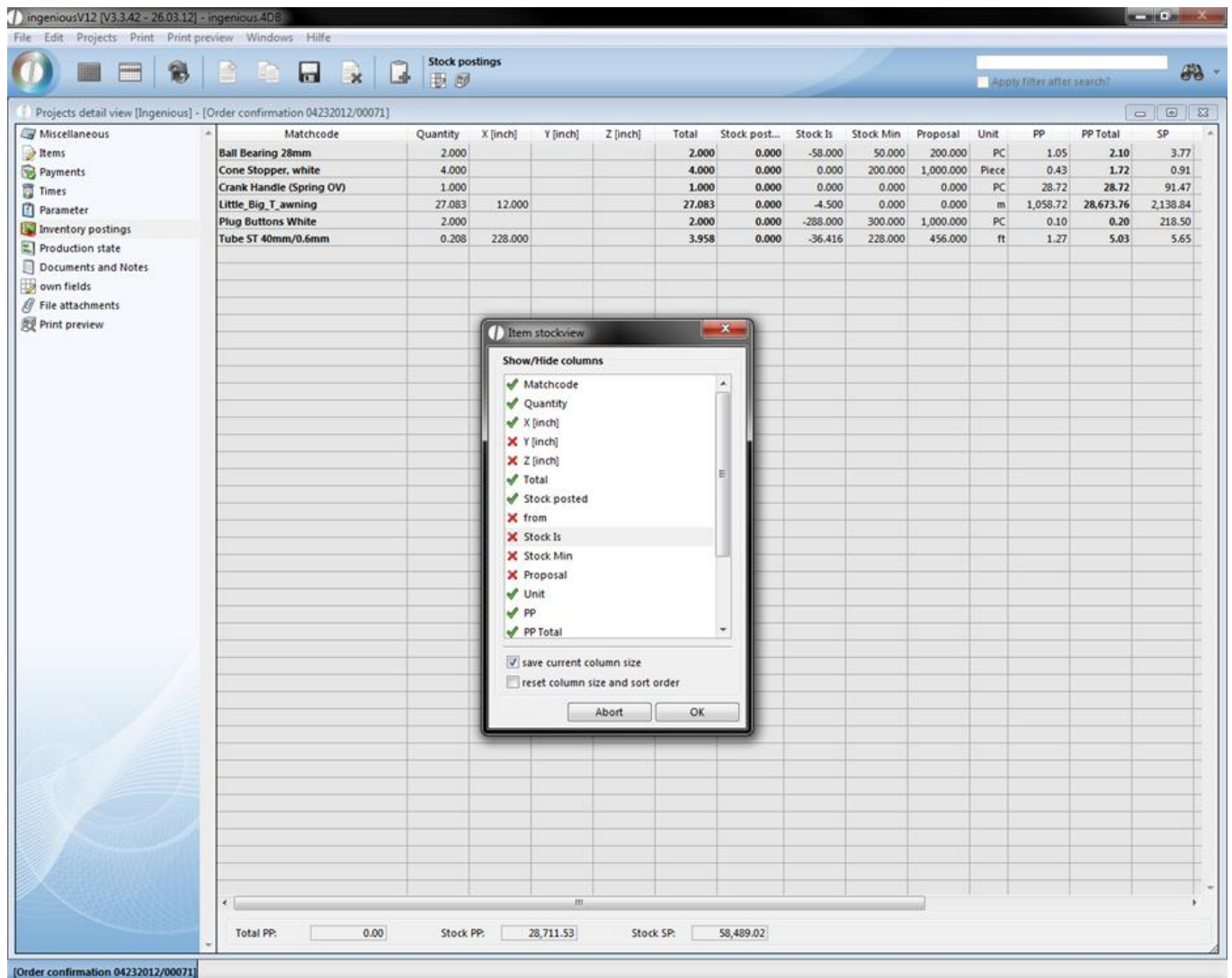
3.3.4.6 Inventory postings

The category "Inventory postings" is only displayed in the project that is set in the program settings for the automatic inventory posting. In the displayed example it is order confirmation. You can also bind the inventory posting to an invoice or a delivery note. You can select inventory postings in the selection area of the detail view of a project. Here you find a list of all stock kept items.

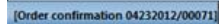
Matchcode	Quantity	X [inch]	Y [inch]	Z [inch]	Total	Stock post...	Stock Is	Stock Min	Proposal	Unit	PP	PP Total	SP
Ball Bearing 28mm	2.000				2.000	0.000	-58.000	50.000	200.000	PC	1.05	2.10	3.77
Cone Stopper, white	4.000				4.000	0.000	0.000	200.000	1,000.000	Piece	0.43	1.72	0.91
Crank Handle (Spring OV)	1.000				1.000	0.000	0.000	0.000	0.000	PC	28.72	28.72	91.47
Little_Big_T_awning	27.083	12.000			27.083	0.000	-4.500	0.000	0.000	m	1,058.72	28,673.76	2,138.84
Plug Buttons White	2.000				2.000	0.000	-288.000	300.000	1,000.000	PC	0.10	0.20	218.50
Tube ST 40mm/0.6mm	0.208	228.000			3.958	0.000	-36.416	228.000	456.000	ft	1.27	5.03	5.65

Total PP: 0.00 Stock PP: 28,711.53 Stock SP: 58,489.02

When you click the button  the window "Item stockview" will open up, where you can activate and deactivate several columns by double click. Additionally you can move columns by drag and drop.



When you check "save current column size" your settings will be applied to the detail view. With "reset column size and sort order" you can restore the original settings.



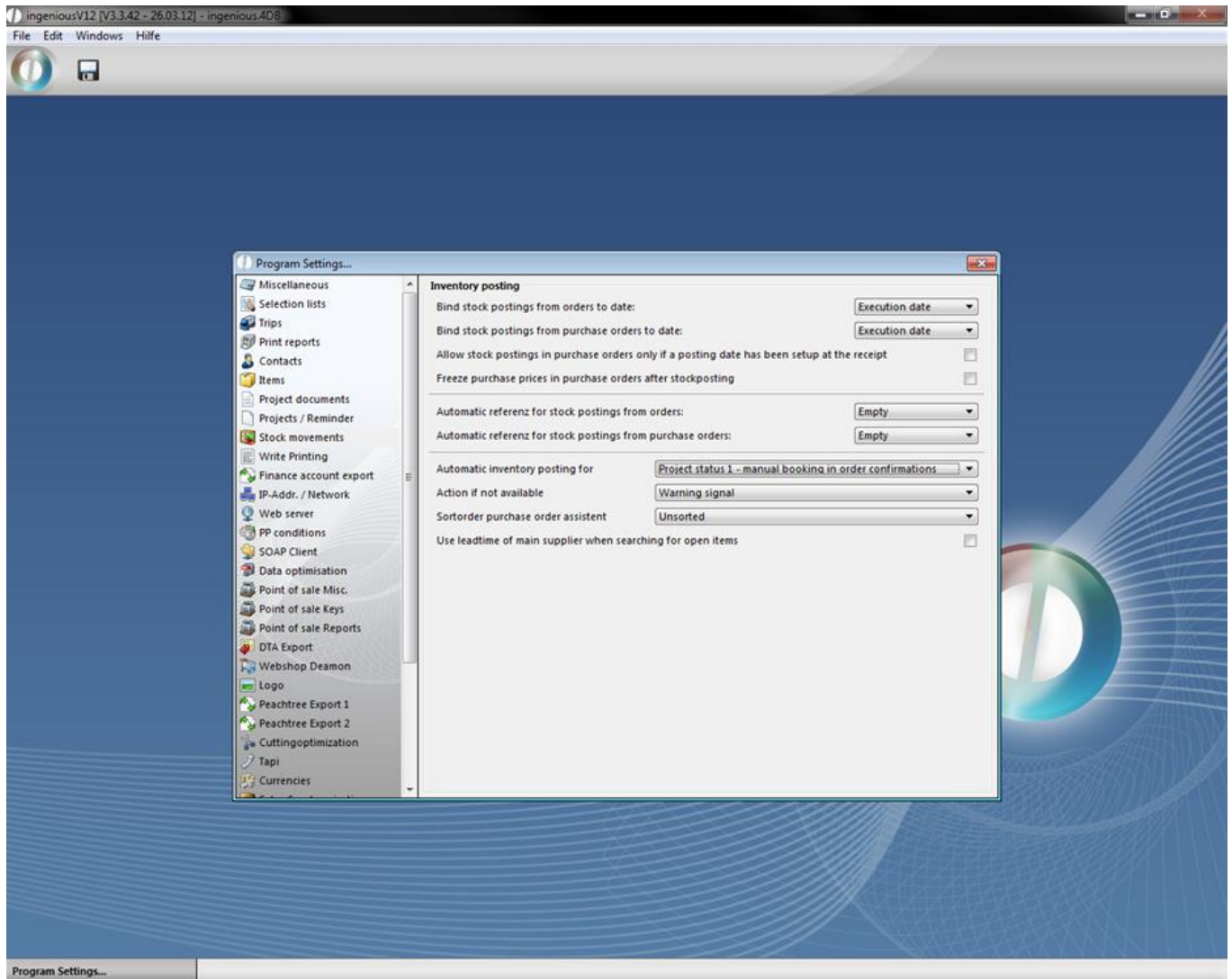
Inventory postings...

Order confirmation: 04232012/00071
Project: test 43

Matchcode	Quantity	X [inch]	Total	Stock posted	Unit	PP	PP Total	SP	SP Total
Ball Bearing 28mm	2.000		2.000	0.000	PC	1.05	2.10	3.77	
Cone Stopper, white	4.000		4.000	0.000	Piece	0.43	1.72	0.91	
Crank Handle (Spring OV)	1.000		1.000	0.000	PC	28.72	28.72	91.47	
Little_Big_T_awning	27.083	12.000	27.083	0.000	m	1,058.72	28,673.76	2,138.84	57.4
Plug Buttons White	2.000		2.000	0.000	PC	0.10	0.20	218.50	
Tube ST 40mm/0.6mm	0.208	228.000	3.958	0.000	ft	1.27	5.03	5.65	
							28,711.53		58,4

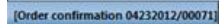
You can also view the inventory postings in the item detail view. When you double click an item in the category "items", the mentioned detail view will open up.

You can also bind the inventory postings to a specific date of the project and set a automatic reference. The corresponding settings you can find in the category "Stock movements" in the program settings.



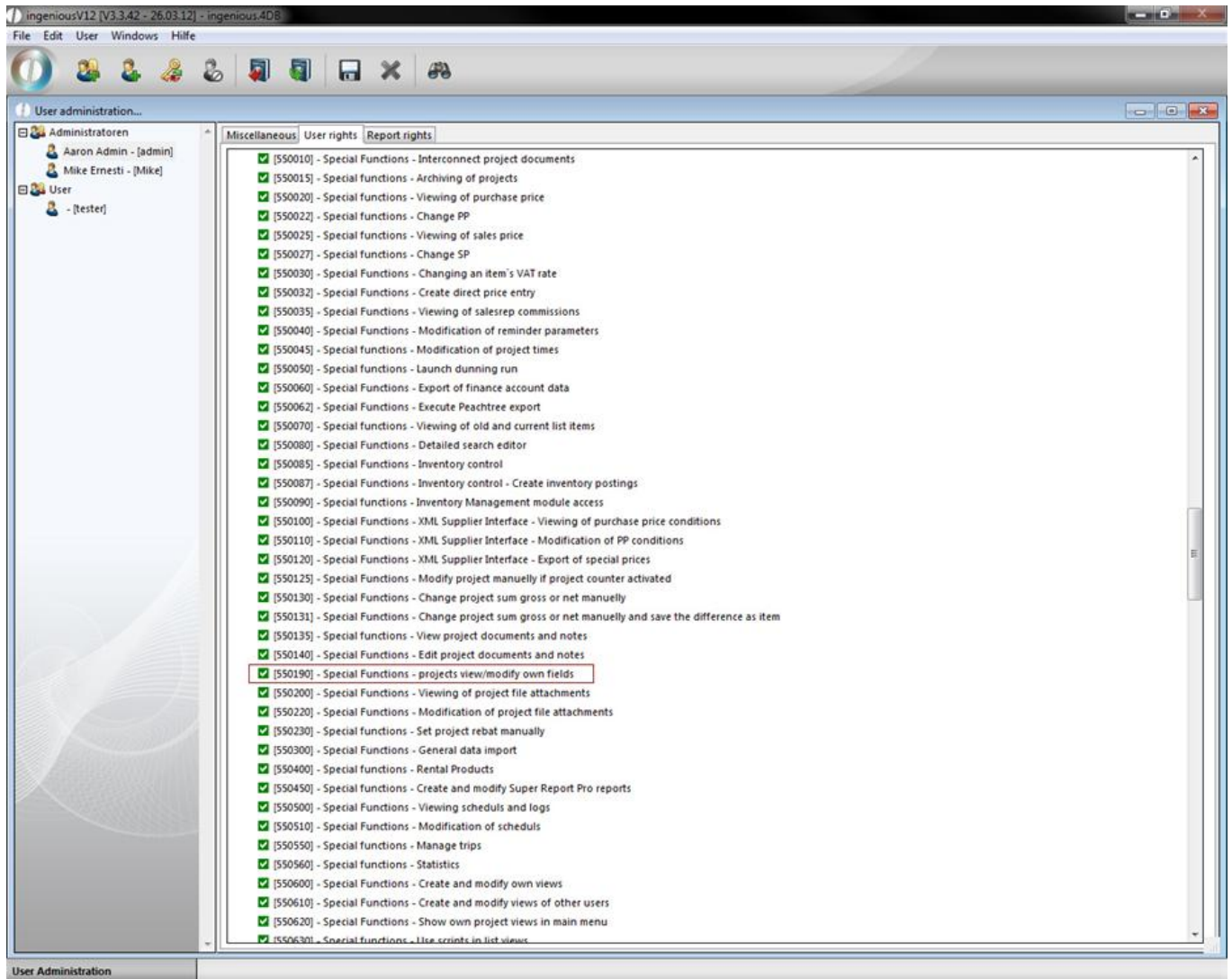
3.3.4.7 Projects documents and dates

You already know the column "Documents & Dates" from the module "Customers". You can create and store different documents here, with the advantage that you can tie the necessary documents directly to your project, and have an overview of all communication regarding the project. The only difference to the contact module is that you cannot add field service activities to the project. We shall therefore not go into greater detail here regarding the creation of a note, fax or a letter.



3.3.4.8 Own projects fields

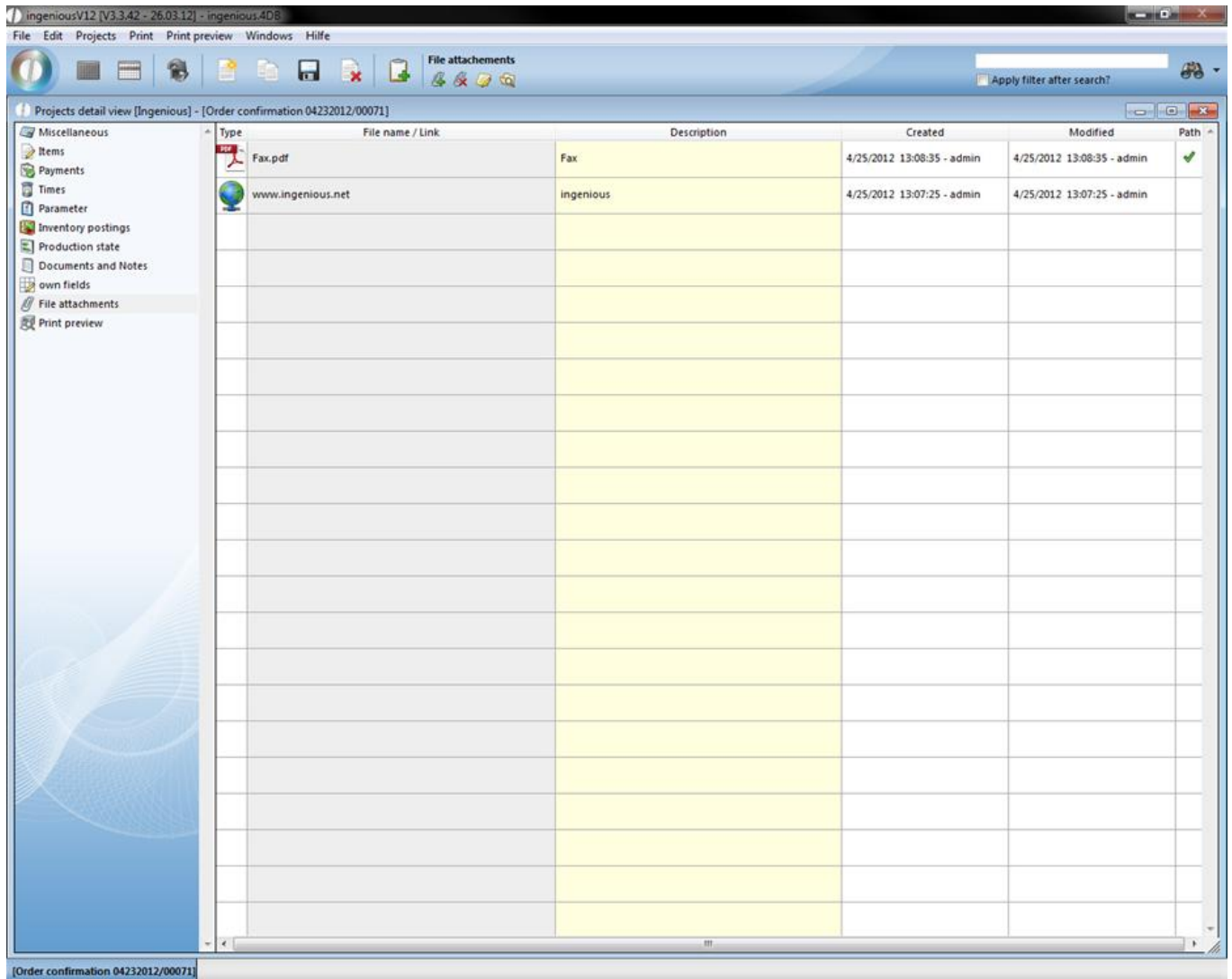
You also already know the "Own fields" detail area from the "Contact Module". Therefore, this will only briefly be described here. The column "Own fields" gives you the possibility to make individual comments about a project. In order to be able to use this area, one has to unlock the corresponding user rights and sign on again.



You can rename the different text fields, figure fields, checkboxes and date specifications for individual entries.

3.3.4.9 Projects file attachments

The file attachment function is available to you in the entire workflow, in purchasing, in the entry record, in the items and in the contacts. Here important external documents are applied to individual projects, centrally managed and saved.



3.3.4.10 Projects print preview

You have two possibilities available to you to print a project document.


Quick printing

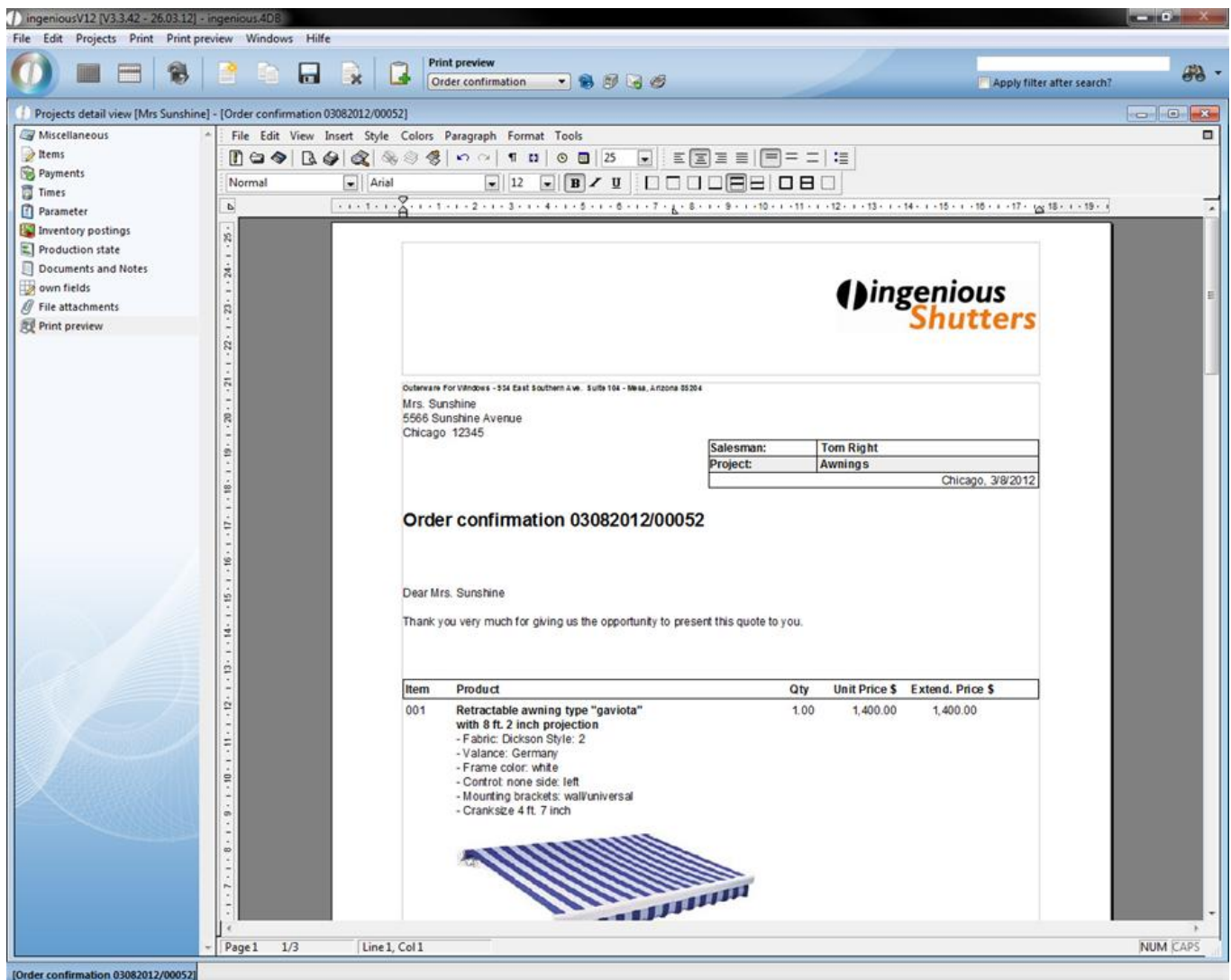
With quick print, you can do without additional Modification of the document. In the list or detail view, select the option, "Workflow - Print project documents" in the "Print" menu. Using the window that appears, select the option that would like to only print the current record. The document will be sent to the standard printer that has been setup in the system, or to the printer designated in the program settings.

The screenshot displays the ingenious.V12 software interface. On the left, a sidebar contains a 'Workflow List view' with various project filters and a 'View filter' section. The main area shows a table of project data with columns for Customer, Telephone, Gross \$, Open \$, and Paifin. The table lists various projects, including 'Ingenious Beethovenstrasse 14 USA-04107 Leipzig' and 'Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345'. The bottom status bar indicates '2 Projects [1 / 55 / 60]'.

Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$						
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	70,034.57 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,049.53 \$						
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$					
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	0.00 \$					
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	88,560.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	18,660.80 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
The Awnning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	15,934.16 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		7,116.91 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		18,660.80 \$						
Attorney's Office Justin Lawrence 7469 King Junior Dr		16,076.00 \$						
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	7,384.42 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		9,264.00 \$						
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		4,764.80 \$						

Printing with integrated text Modification: Print preview

In the item texts, you can make arbitrary formatting and even insert pictures of items. In order to be able to add these to the document, you must select the RTF format in the project parameters (Pos text origin) or select print in the program settings. With the refresh button , you can generate the finished document and the document template is already set. You have the possibility to individually change the document with the help of different text tools. Print the document no by clicking on the print icon and confirm the dialog that appears.

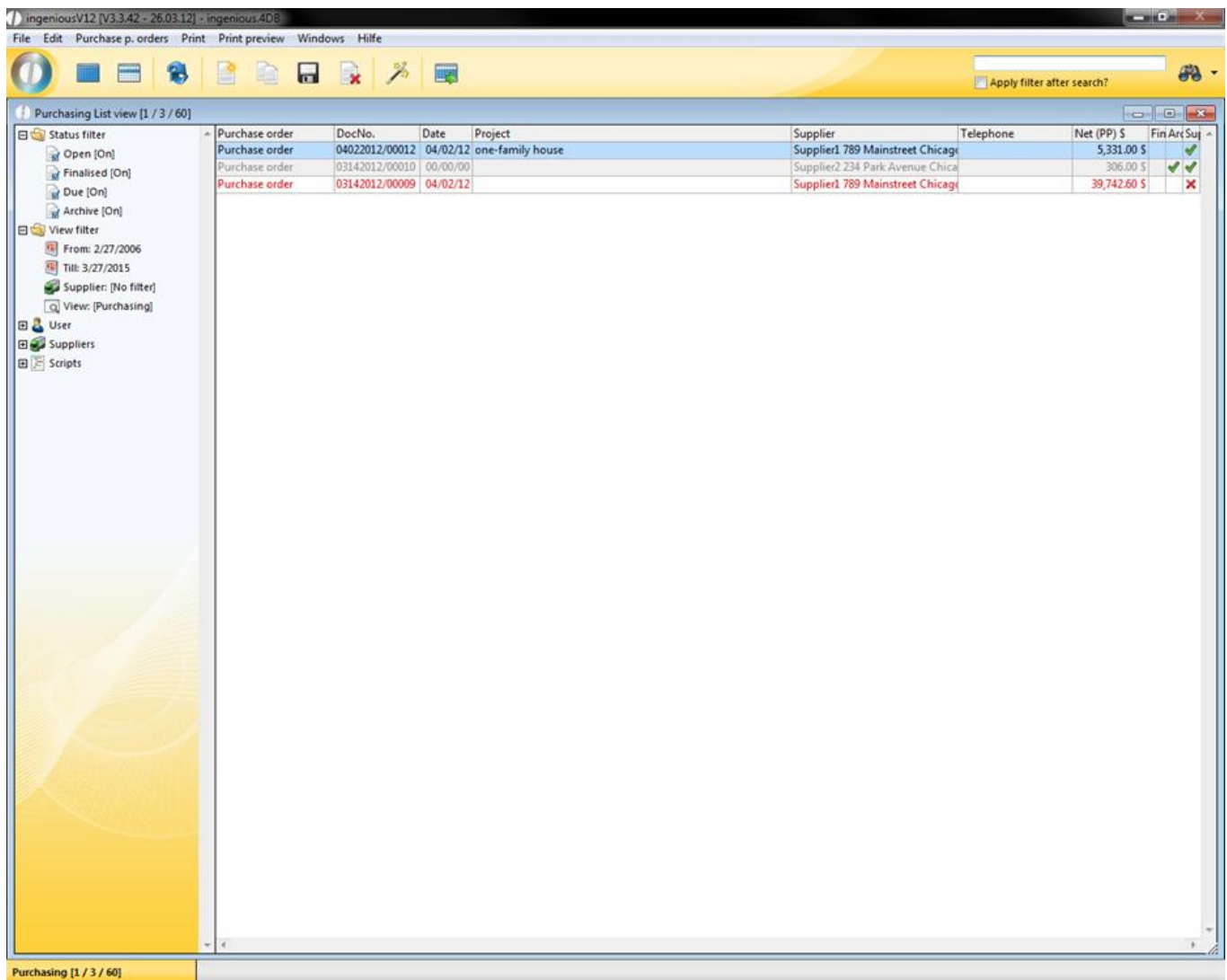


3.4 Purchase orders

3.4.1 Purchase orders list view

3.4.1.1 Purchase orders list view

The list view gives an overview of all purchase orders that have been placed so far. You can filter the report after a certain time period, according to order status and according to the user or supplier. It is an easy to remind suppliers or to transfer availability information over to other departments. In the list view of the module the orders are shown in color (gray = archived, red = desirable date of delivery crossed and not yet delivered / project not concluded;

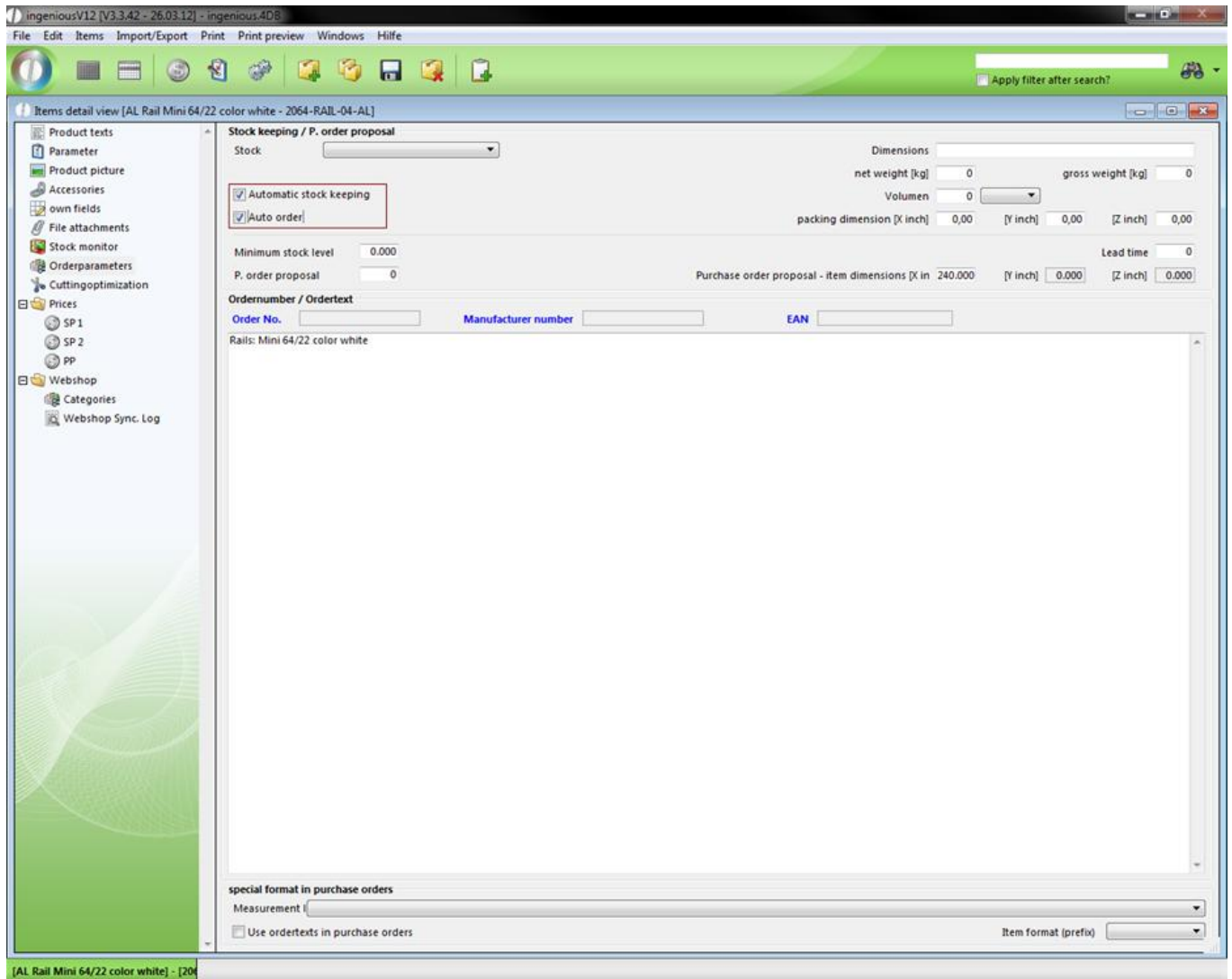







The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42 - 26.03.12' and the database 'ingenious.408'. The menu bar includes 'File', 'Edit', 'Purchase p. orders', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains various icons for file operations and search. The main window is titled 'Purchasing List view [1 / 3 / 60]'. On the left, a sidebar shows a 'Status filter' with options like 'Open [On]', 'Finalised [On]', 'Due [On]', and 'Archive [On]', as well as a 'View filter' with date ranges and a 'User' section. The main table lists purchase orders with columns for DocNo., Date, Project, Supplier, Telephone, Net (PP) \$, and Fin Arc. The table contains three rows of data, with the last row highlighted in red.

Purchase order	DocNo.	Date	Project	Supplier	Telephone	Net (PP) \$	Fin Arc	Sug
Purchase order	04022012/00012	04/02/12	one-family house	Supplier1 789 Mainstreet Chicago		5,331.00 \$		✓
Purchase order	03142012/00010	00/00/00		Supplier2 234 Park Avenue Chica		306.00 \$		✓
Purchase order	03142012/00009	04/02/12		Supplier1 789 Mainstreet Chicago		39,742.60 \$		✗

3.4.1.2 Purchase order assistant

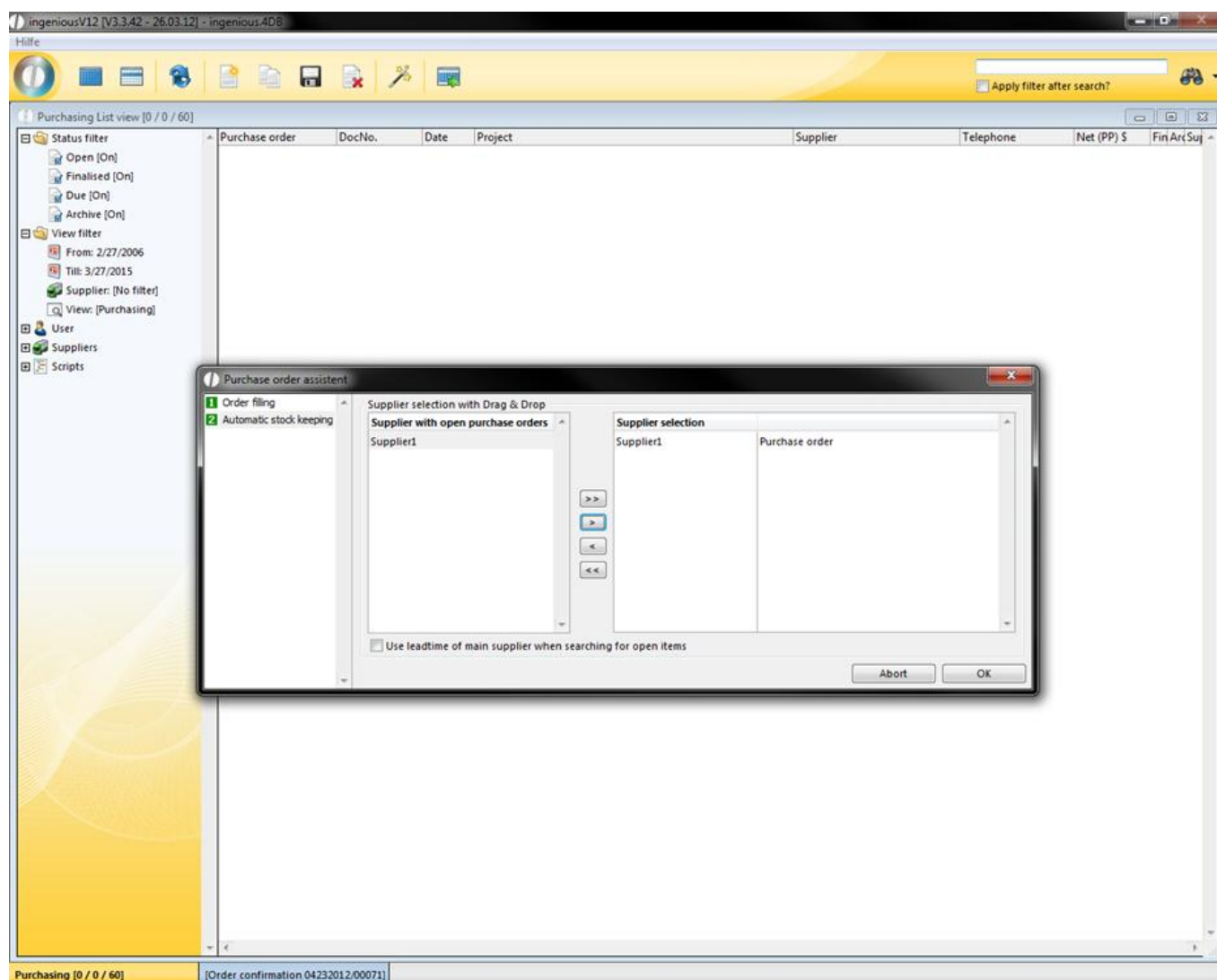
The automatic inventory management makes an automated order possible. The Purchase order assistant in the "Purchasing" module examines all final order confirmations with the current inventory and determines whether and how much of the necessary items must be ordered. One condition is that the items in the catalog are characterized as "Purchase Order" or during order-related procurement as "Order filling".

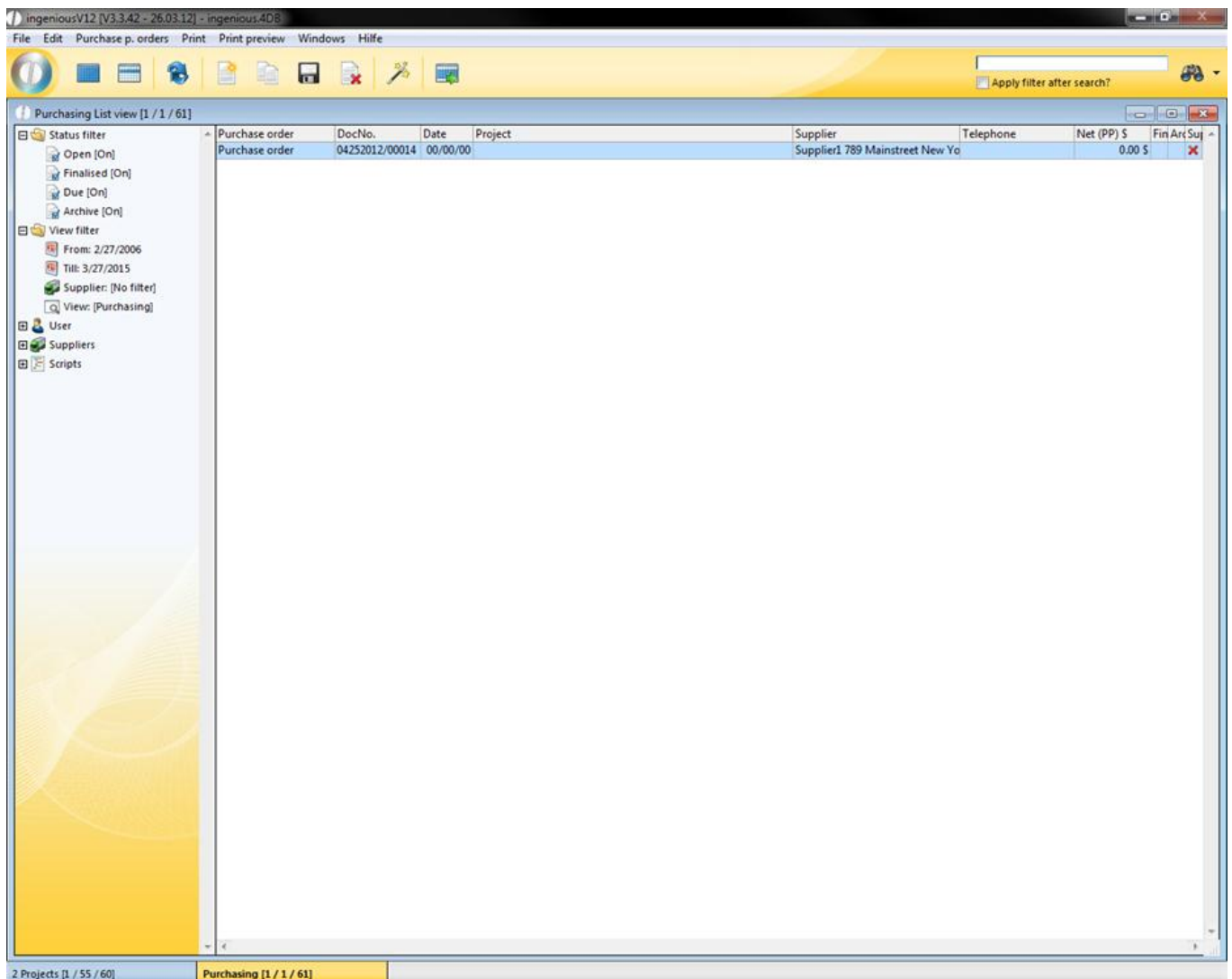


You can open the order assistant with the menu: Orders or with the  button. The order assistant extracts the item parameters according to which supplier the job should be given. A selection of all suppliers who are available for the orders appears. With the , ,  and  buttons, the desired orders can be selected and merged into an order by clicking on "OK". The condition is that the items are listed in the catalog as "Order items" or respectively as "Order Consignment" with related orders.

After confirming on "OK", all orders are made. They are now indicated in the list view and can be edited individually. After the selection of the individual orders, you can examine the items and add the header and footer texts. If necessary, you can correct the prices and add additional items.

In the automatic inventory management, you will find a list of all suppliers with outstanding orders. The condition is that the respective items are activated in the "Order Parameter" column for automatic warehouse management and automatic orders.





Under the supplier assignment, the items with several suppliers are indicated.

Multi suppliers

When a company obtains items from multiple suppliers, this can be mentioned at the item in multi suppliers in ingenious.V12. You just have to check the field "multi suppliers" in the parameter category (Vgl. Kap. 4.2.2.2).

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Items Import/Export Print Print preview Windows Hilfe

Items detail view [1 Cha. Remote Wall Mount Transmitter - cream - 100100-10]

Product texts
Parameter
Product picture
Accessories
own fields
File attachments
Stock monitor
Orderparameters
Cuttingoptimization
Prices
Webshop
Categories
Webshop Sync. Log

Manufacturing
Item in part list: 5.Controls
Item in packing list
Default measurement sheet

Item status
☐ Sales product ☒ Purchase order item ☐ Item disabled ☐ XML Supplier export
☐ Order filling ☐ Cuttingoptimization ☒ Multi suppliers ☐ Multi-lingual product

Rental/Serial numbers
☐ Rental product ☐ Serial number liability

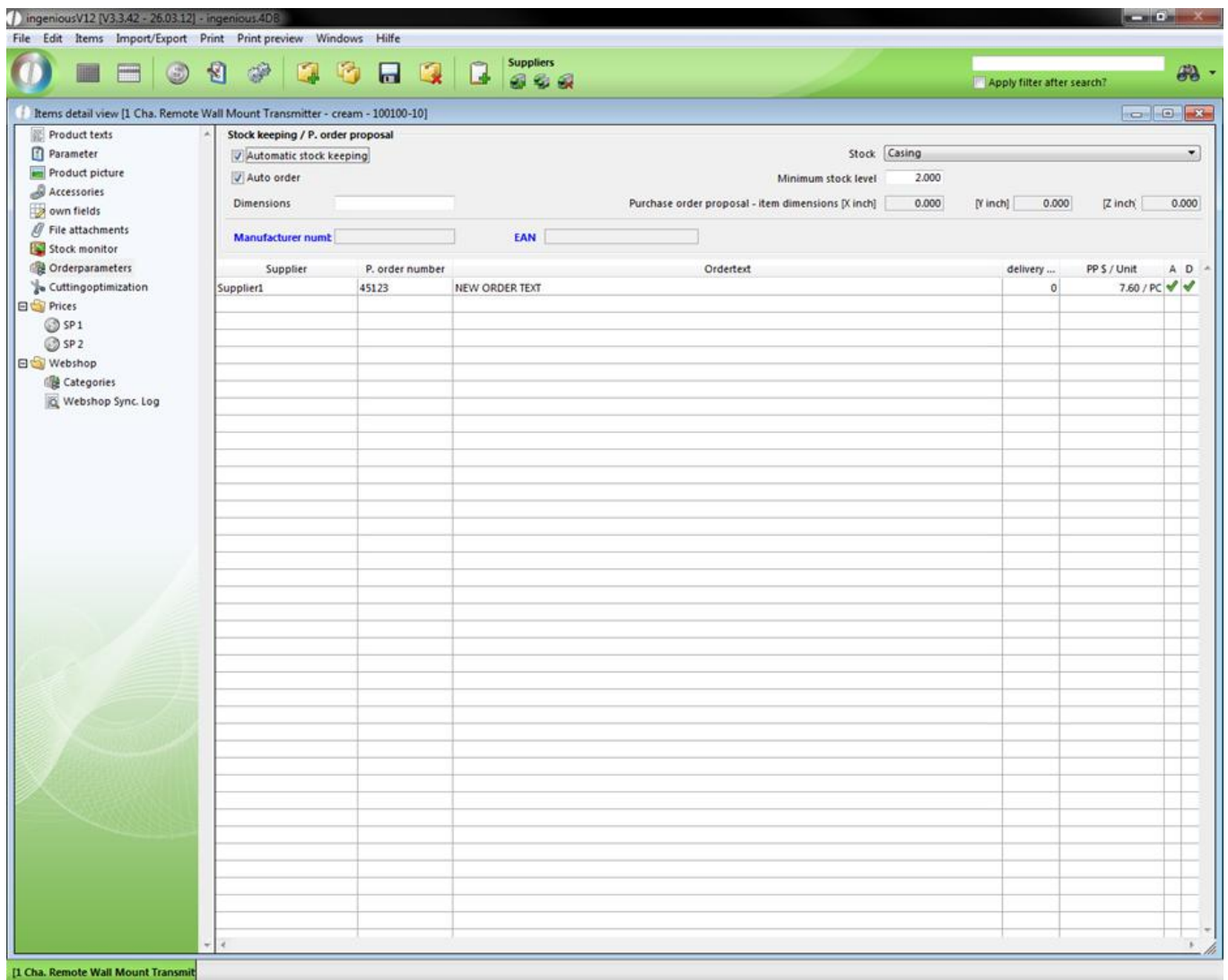
Finance account
Proceeds account with s. ta: 4501
VAT rate: Full VAT rate
Proc. account with s. tax (abro.):
Cost centre: 1000


Classification
Directory: Product A
Supplier: Supplier1
Catalogue
Segment group
Commodity group
Product group: Motor
Price comparison group
Commission group: Sales

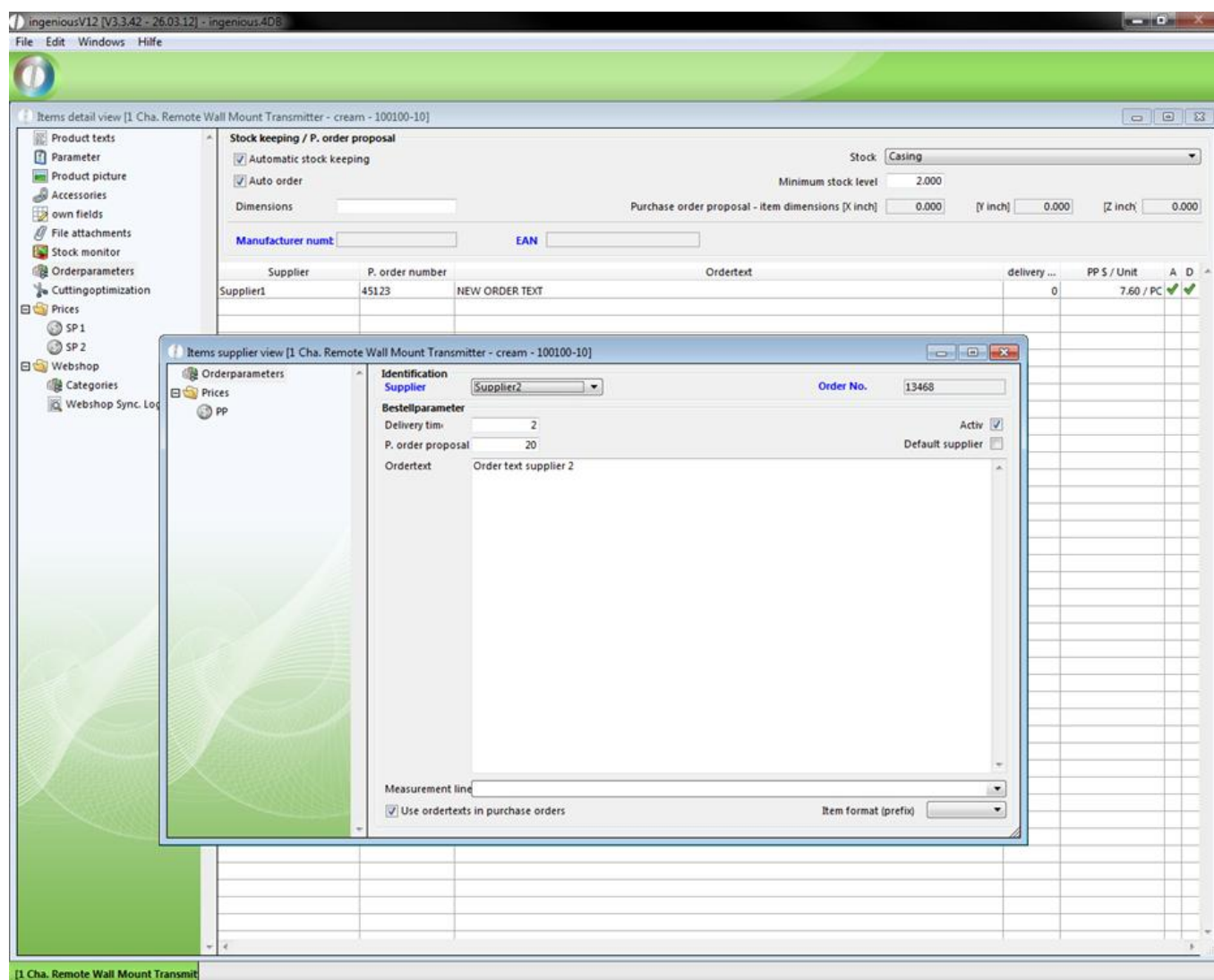
Barcode
No. of consign. labels: Global Program Settings
Consign. labels per item: 0

[1 Cha. Remote Wall Mount Transmitter]

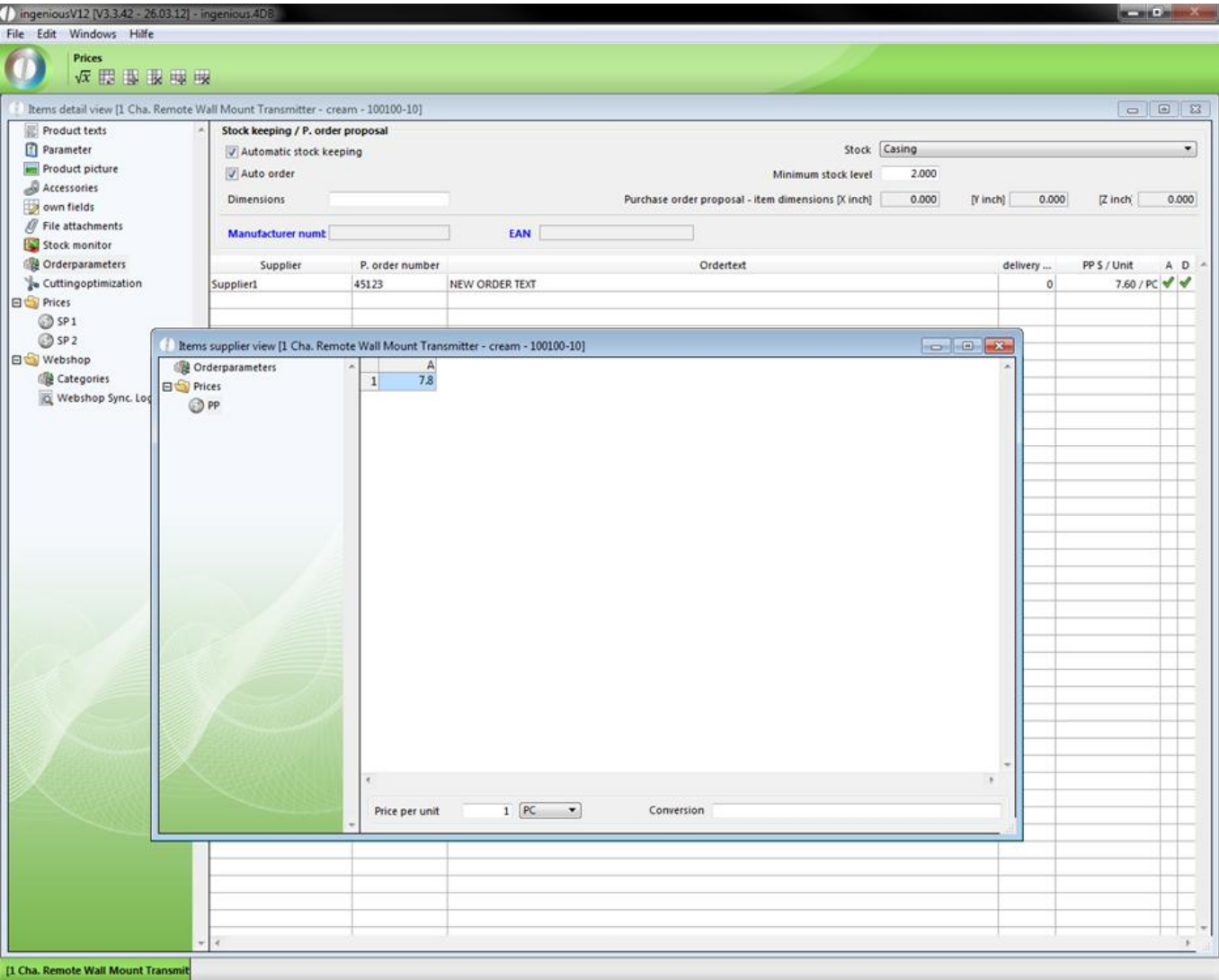
Now the purchase price can be found in the category "order parameter" and there is also displayed automatically the default supplier.



With the help of the button  a new supplier can be added. In order to do this you only have to choose the desired supplier and set the order number, the delivery time in days, the purchase order proposal, the individual order text and the measurement line.

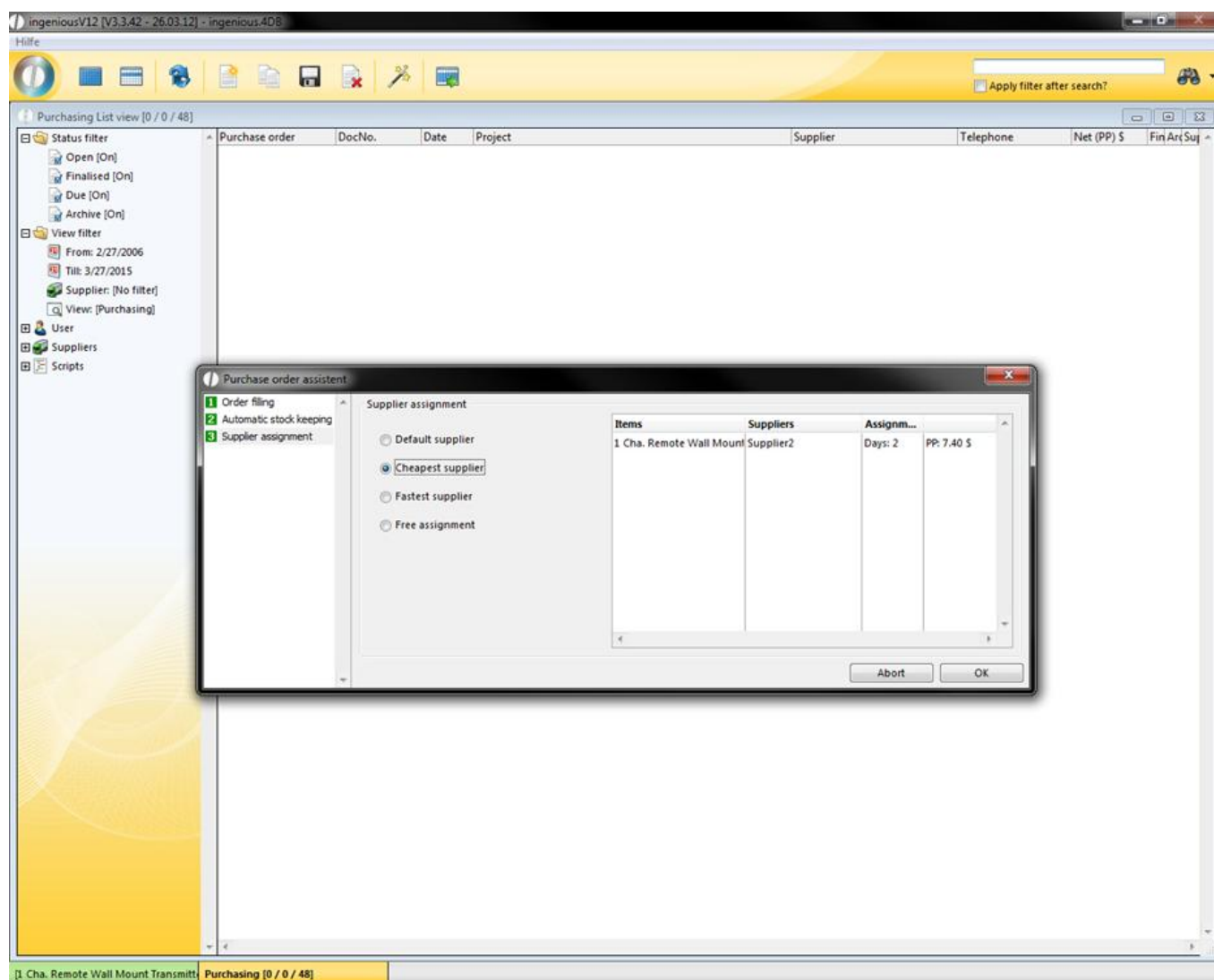


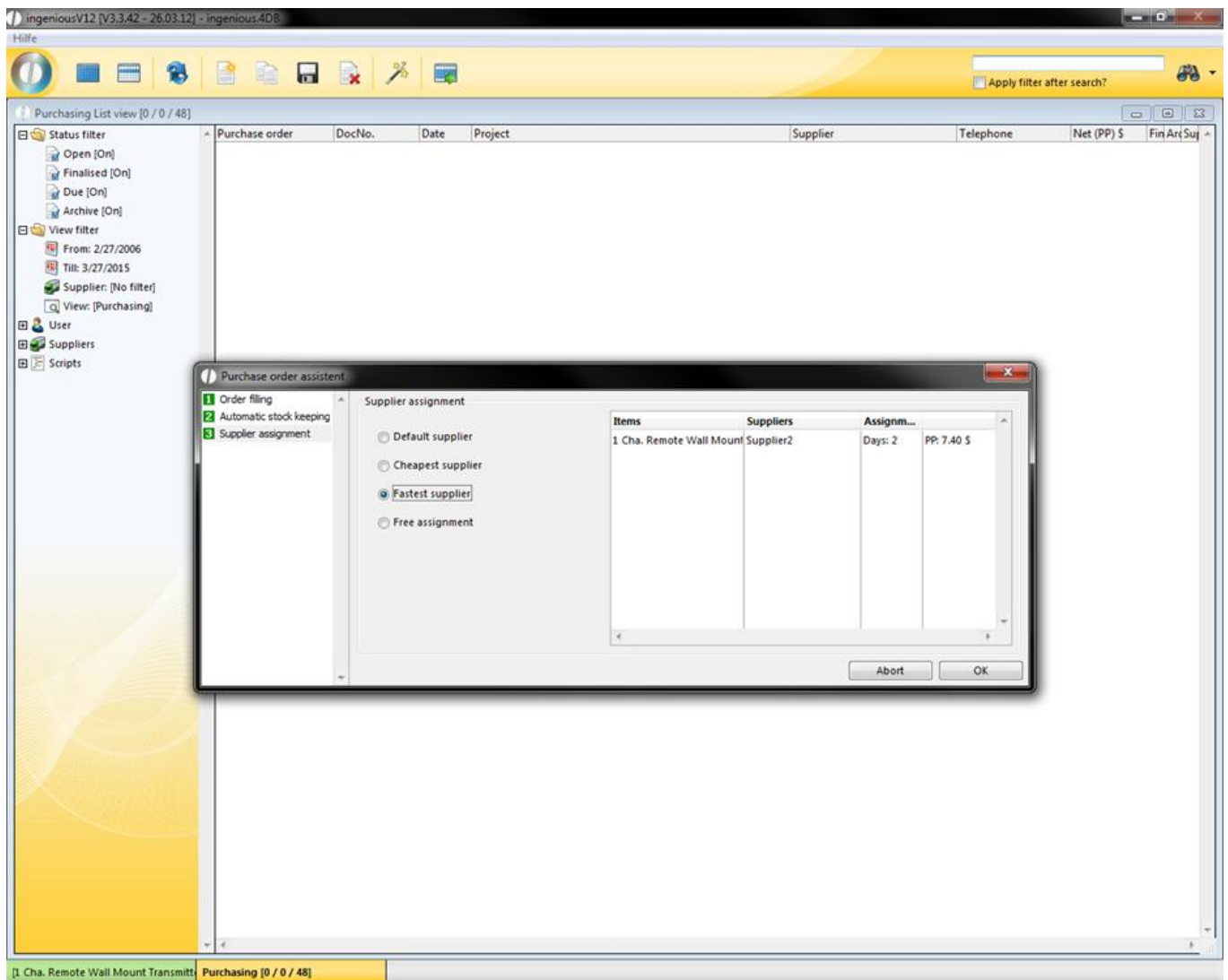
In addition you lodge in prices the purchase price for the item according to this supplier.



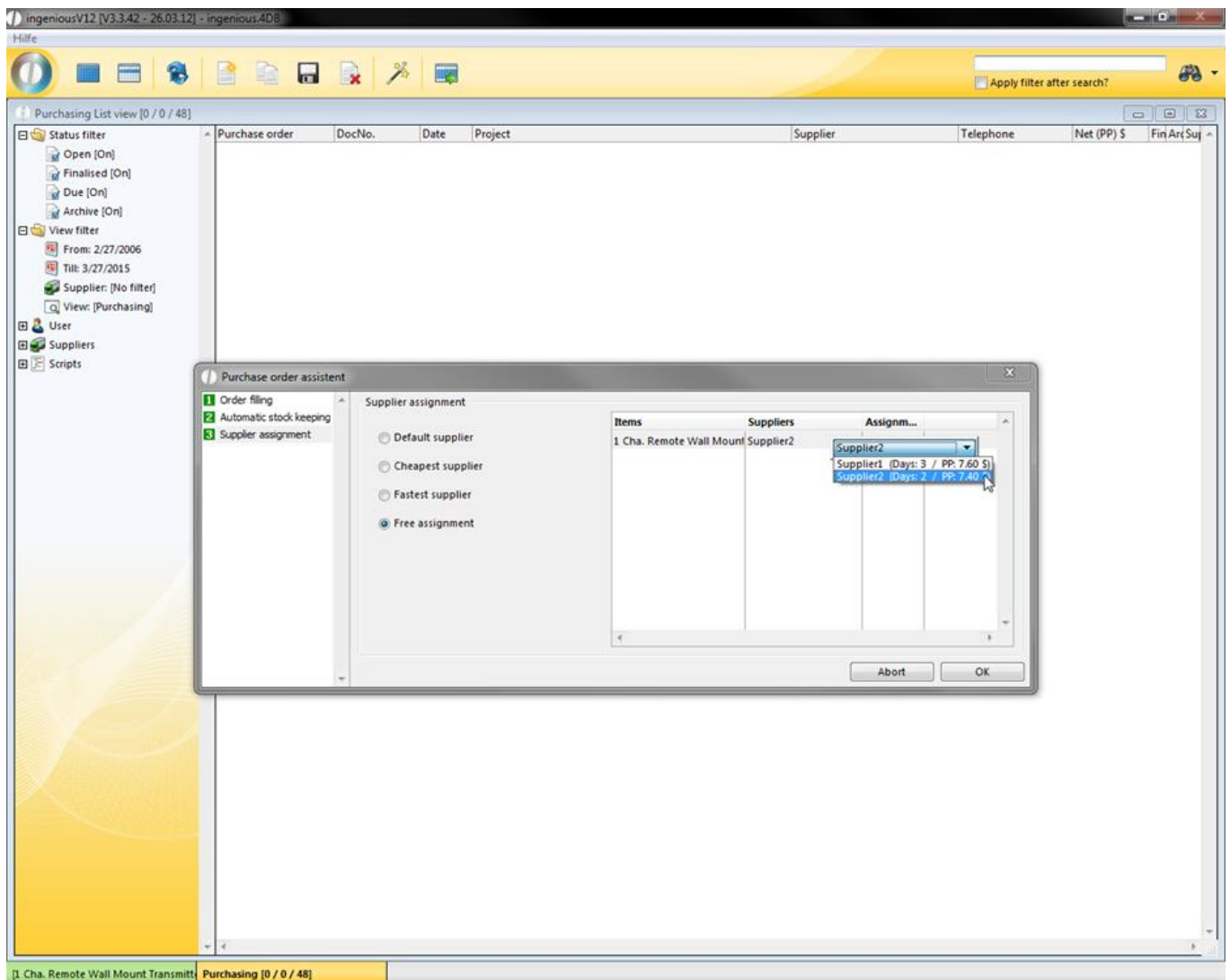


choose from the created suppliers (condition: "automatic stock keeping" of the item), like in the following example.



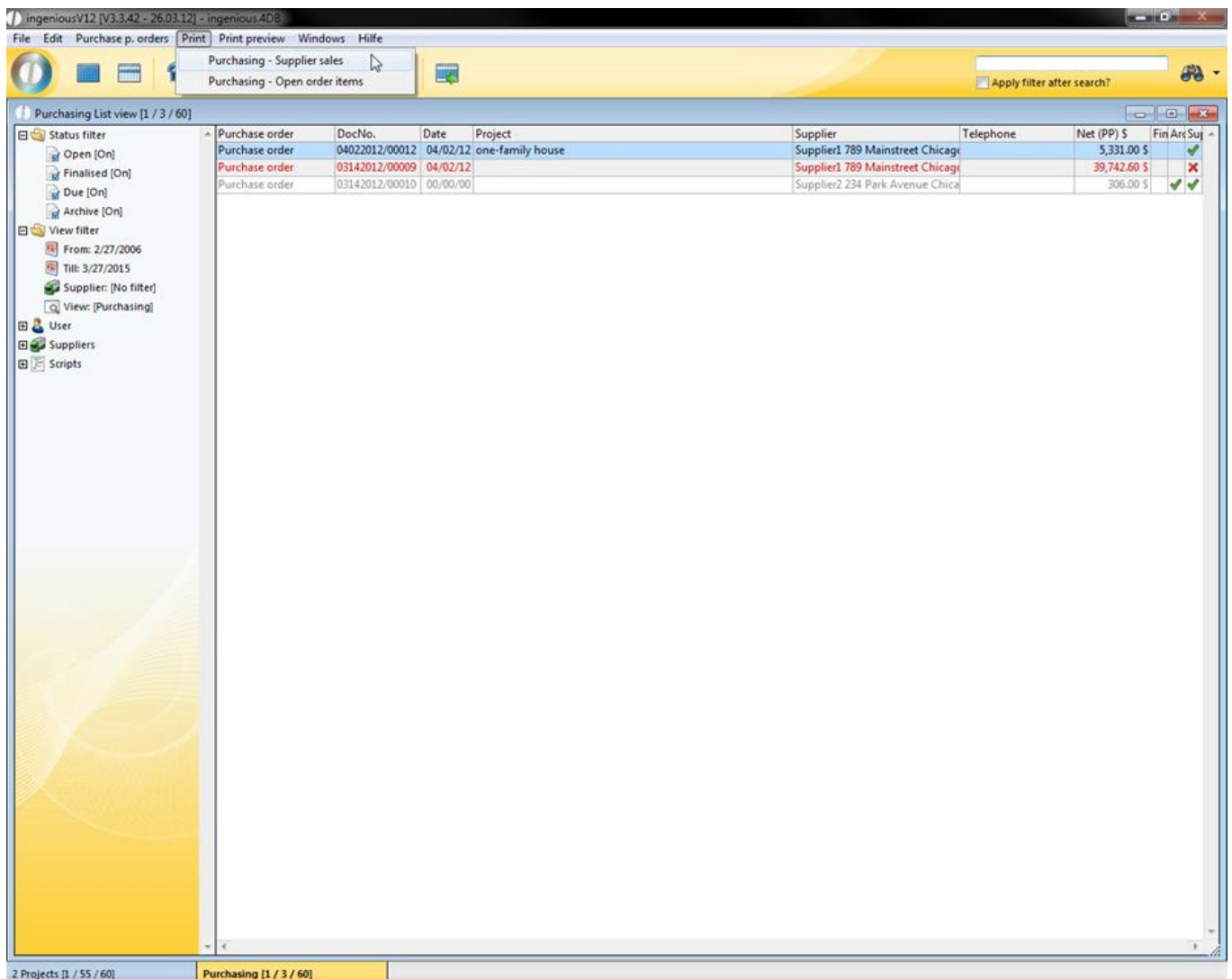


If you select "free assignment" you can choose between all created suppliers by double clicking the line.

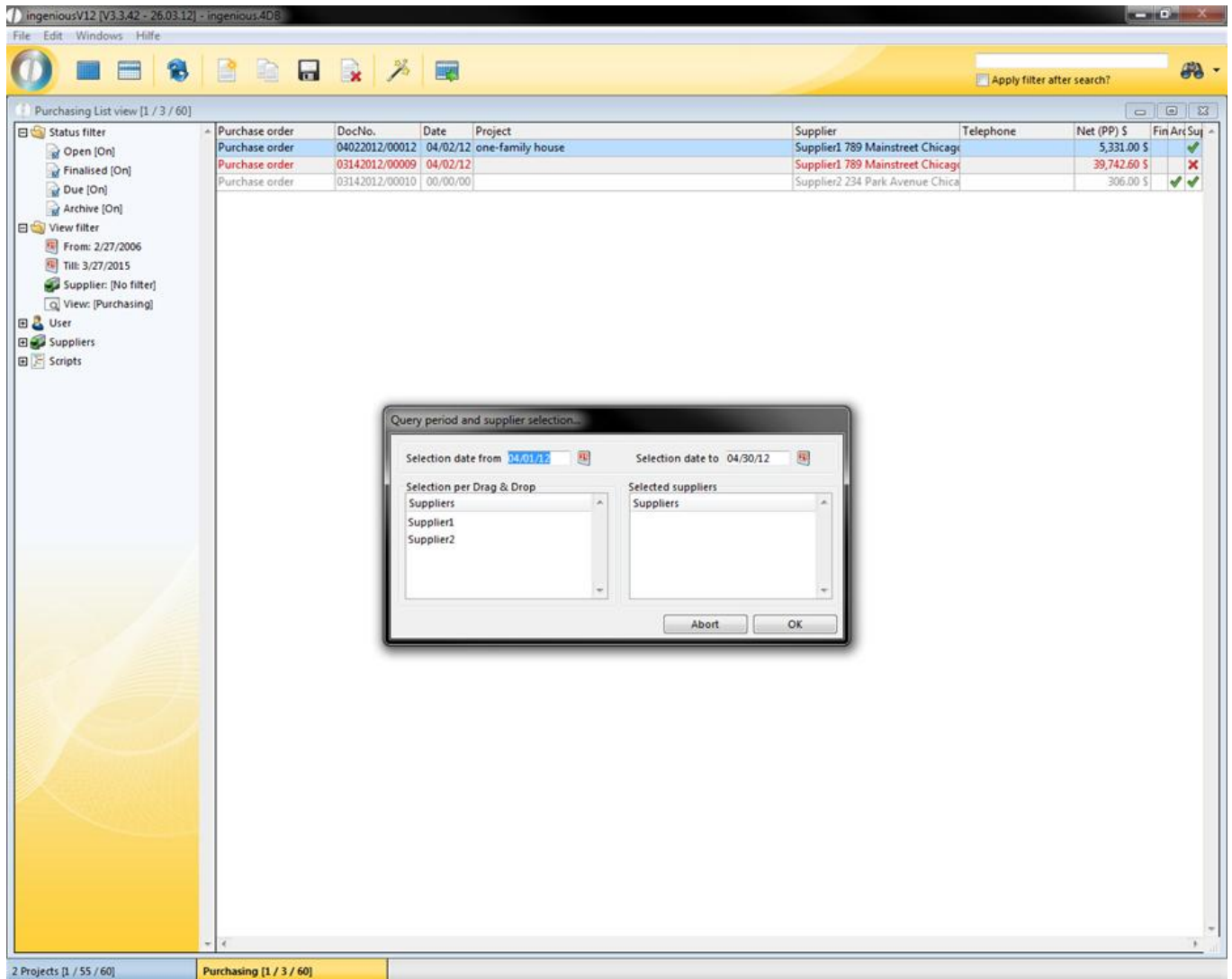


3.4.1.3 Printing purchase orders lists

With a larger purchase order volume, the use of fixed print reports is thus recommended with orders made by several suppliers. After you have edited all orders, switch to the list view, mark the projects to be given out, and select the desired option in the menu.



In the dialog that appears, select "All selected". Here a new window appears, in which you can select the date and the relevant suppliers (Via Drag & Drop).



With one print run, you will thus receive all supplier sales and all open order items.

3.4.1.4 Incoming goods Inventory

By closing a confirmation order that contains items from the catalog, an outlet in the assigned quantity is booked in the stock monitor of the respective item. Thereby if a new order becomes necessary, the order assistant takes care of this, as previously described. In the stock monitor, the ordered quantity is indicated. In order to have access to the incoming goods, you open the order and switch to the item view. In the last column of each catalog item, the acquisition is to be registered. By double-clicking on the field, the dialog window for the inventory opens for you to register the delivered quantity.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items View Options Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

Header text

Item	Items	P.order no.	Name	Quantity	X inch	Flat pr.	Unit pr.	Total price	Stock	St. b.
001	HV Blade no.3 16.5ft iv		HV Blade no.3 16.5ft ivory	120.00	198.000	1.17	19.31	2,316.60	0.00	1,715.
002	Mini Felt FL 26027045GYW		Mini Felt (.270 x .260)	500.00	12.000	0.04	0.04	20.00	0.00	210.
003	HV #3 Long Screw FL 10N300TH84X		HV #3 Long Screw	2,000.00		0.13	0.13	260.00	0.00	2,134.
004	HV CENTERMATE no.141-IV-421		HV CENTERMATE no.1 20ft, color: Ivory	6.00	240.000	2.81	56.20	337.20	0.00	83.
005	HV CENTERMATE no.141-WH-421		HV CENTERMATE no.1 20ft, color: white	6.00	240.000	2.81	56.20	337.20	0.00	111.
006	HV CEILING HEADER No.1 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	240.000	2.84	56.80	227.20	0.00	45.
007	HV CEILING HEADER No.1 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	8.00	240.000	2.84	56.80	454.40	0.00	18.
008	HV 90/180 STARTER 2x 41-IV-415		HV 90/180 STARTER 20ft, color: Ivory	14.00	240.000	0.82	16.40	229.60	0.00	228.
009	Mini Felt 26027045GYW		Mini Felt (.270 x .260)	500.00	12.000	0.04	0.04	20.00	0.00	520.
010	HV CENTERMATE no.141-WH-421		HV CENTERMATE no.1 20ft, color: white	12.00	240.000	2.81	56.20	674.40	0.00	260.
011	HV CEILING HEADER No.1 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	240.000	2.84	56.80	227.20	0.00	100.
012	HV CEILING HEADER No.1 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	4.00	240.000	2.84	56.80	227.20	0.00	100.

Post stock

Item quantity: 1,980.000 inch

Stock posted so far: 0.000 inch

In/Out: 1980 inch

Reference:

Abort Post stock

PP [USD] 5,331.00

SP [USD] 28,949.80

Stock posted

Footer text

2 Projects [1 / 55 / 60] [Purchase order 04022012/00012]

Entry of incoming goods

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items View Options Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

▼ Header text

Item	Items	P.order no.	Name	Quantity	X inch	Flat pr.	Unit pr.	Total price	Stock	St. b.
001	HV Blade no.3 16.5ft iv		HV Blade no.3 16.5ft ivory	120.00	198.000	1.17	19.31	2,316.60	1,980.00	1,715.
002	Mini Felt FL	26027045GYW	Mini Felt (.270 x .260)	500.00	12.000	0.04	0.04	20.00	500.00	210.
003	HV #3 Long Screw FL 10N300TH84X		HV #3 Long Screw	2,000.00		0.13	0.13	260.00	2,000.00	2,134.
004	HV CENTERMATE no.1 41-IV-421		HV CENTERMATE no.1 20ft, color: Ivory	6.00	240.000	2.81	56.20	337.20	120.00	83.
005	HV CENTERMATE no.1 41-WH-421		HV CENTERMATE no.1 20ft, color: white	6.00	240.000	2.81	56.20	337.20	120.00	111.
006	HV CEILING HEADER No.1 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	240.000	2.84	56.80	227.20	80.00	45.
007	HV CEILING HEADER No.1 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	8.00	240.000	2.84	56.80	454.40	160.00	18.
008	HV 90/180 STARTER 2x 41-IV-415		HV 90/180 STARTER 20ft, color: Ivory	14.00	240.000	0.82	16.40	229.60	280.00	228.
009	Mini Felt	26027045GYW	Mini Felt (.270 x .260)	500.00	12.000	0.04	0.04	20.00	500.00	520.
010	HV CENTERMATE no.1 41-WH-421		HV CENTERMATE no.1 20ft, color: white	12.00	240.000	2.81	56.20	674.40	240.00	260.
011	HV CEILING HEADER No.1 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	240.000	2.84	56.80	227.20	80.00	100.
012	HV CEILING HEADER No.1 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	4.00	240.000	2.84	56.80	227.20	80.00	100.

PP [USD] 5,331.00
SP [USD] 28,949.80

▼ Footer text

2 Projects [1 / 55 / 60] [Purchase order 04022012/00012]

If all items were delivered, then the incoming goods can be accessed at once. For this, only the marking of the field, "Stock posted" is necessary. With the storing of the changes in the order, the addition is noted in the stock monitor of the item.

The screenshot displays the 'Stock monitor' window in the ingenious.V12 software. The window title is 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408'. The menu bar includes File, Edit, Items, Import/Export, Print, Print preview, Windows, and Hilfe. The toolbar contains various icons for file operations and data management. The main area is titled 'Items detail view [HV Blade no.3 16.5ft ivory FL - 345302-02]'. On the left, a sidebar lists navigation options: Product texts, Parameter, Product picture, Accessories, own fields, File attachments, Stock monitor (selected), Orderparameters, Cuttingoptimization, Prices (with sub-items SP 1, SP 2, PP), Webshop, Categories, and Webshop Sync. Log. The main content area shows the 'Status' section with 'Stock balance' at 1,715.875, 'Ordered' at 0.000, and 'Reserved' at 0.000. Below this is a table of stock movements. The table has columns for Booking type, Project, Reference, Quantity, x [inch], y [inch], z [inch], Total, Unit, and Date. The movements include a purchase order, two consumption entries, and two inventory posting entries. The status bar at the bottom indicates '[HV Blade no.3 16.5ft ivory FL] - [345302-02]'.

Booking type	Project	Reference	Quantity	x [inch]	y [inch]	z [inch]	Total	Unit	Date
Purchase order	04022012/00012		120.000	198.000	0.000	0.000	1,980.000	ft	4/2/2012 - 11:23:17 - admin
Consumption	No such project		30.000	48.875	0.000	0.000	122.188	ft	3/16/2012 - 08:57:07 - admin
Consumption	No such project		15.000	52.875	0.000	0.000	66.094	ft	3/16/2012 - 08:57:07 - admin
Consumption	No such project		39.000	44.875	0.000	0.000	145.844	ft	3/16/2012 - 08:57:07 - admin
Inventory posting	3/14/2012 - admin		70.000	12.000	0.000	0.000	70.000	ft	3/14/2012 - 10:48:33 - admin
Inventory posting	3/13/2012 - admin		20.000	12.000	0.000	0.000	20.000	ft	3/14/2012 - 16:27:40 - admin


View of inventory movement

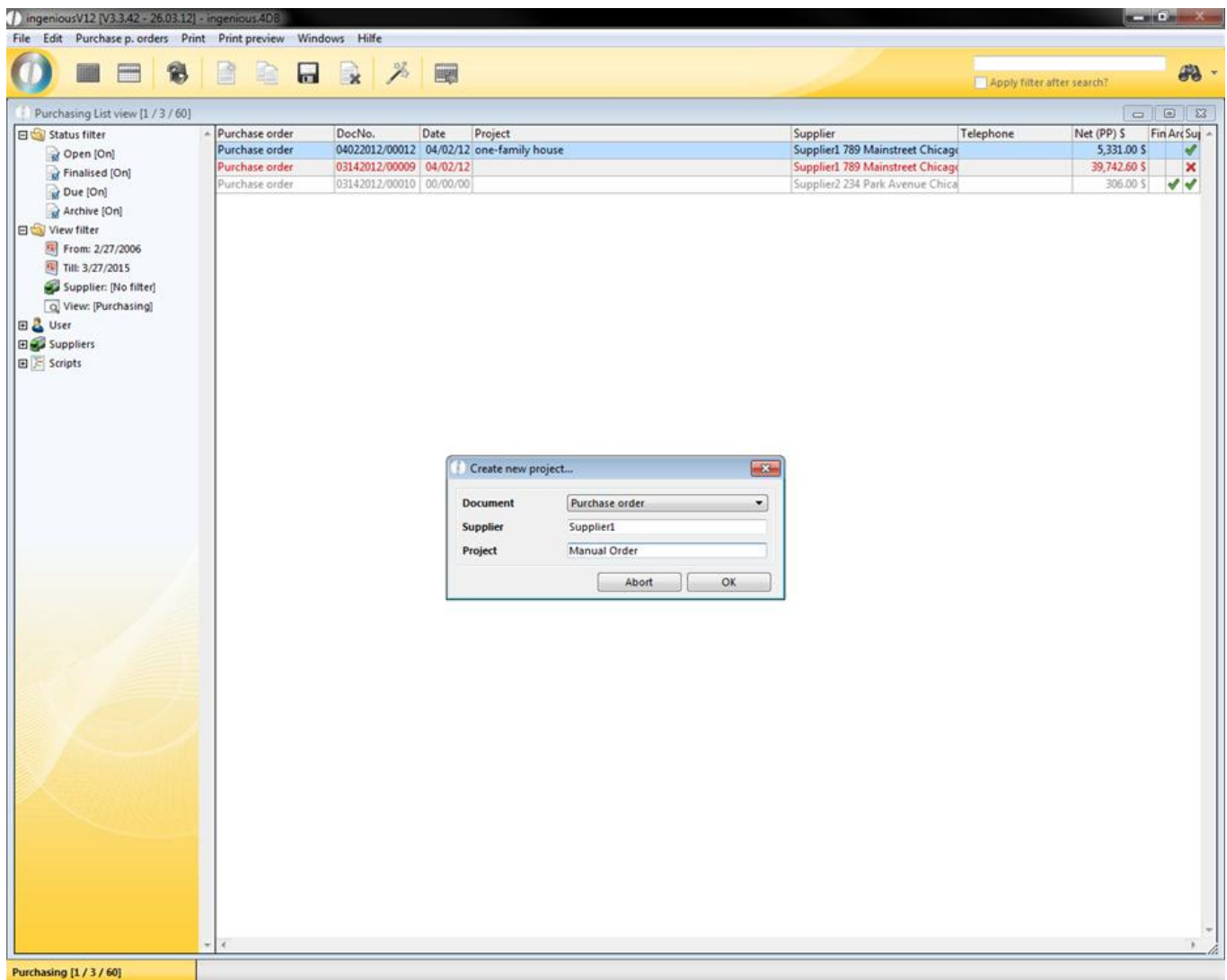
The new status is calculated and is available for the next reviews. In the order itself, the delivery status is indicated in miscellaneous.

Delivery status

3.4.1.5 Creating new purchase orders manually

Alternatively you also have the possibility of placing an order manually. This is necessary, if for example you want to fill your inventory due to a special quotation, but don't yet have the stock to make the order. Furthermore, you can manually order separate consumer goods such as office supplies. In the "Purchasing" module, you create a new order

using the menu "Order/Place order" or by using the  icon to place a new order. Enter the match code of the supplier and assign project identification for a better overview.



The order is placed and displayed in the list view. After switching to the detail view, you can edit the items. Enter products from the catalog or the directly invoiced items.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items View Options Print Print preview Windows Hilfe

Projects detail view [Supplier1] - [Purchase order 04252012/00015]

Header text

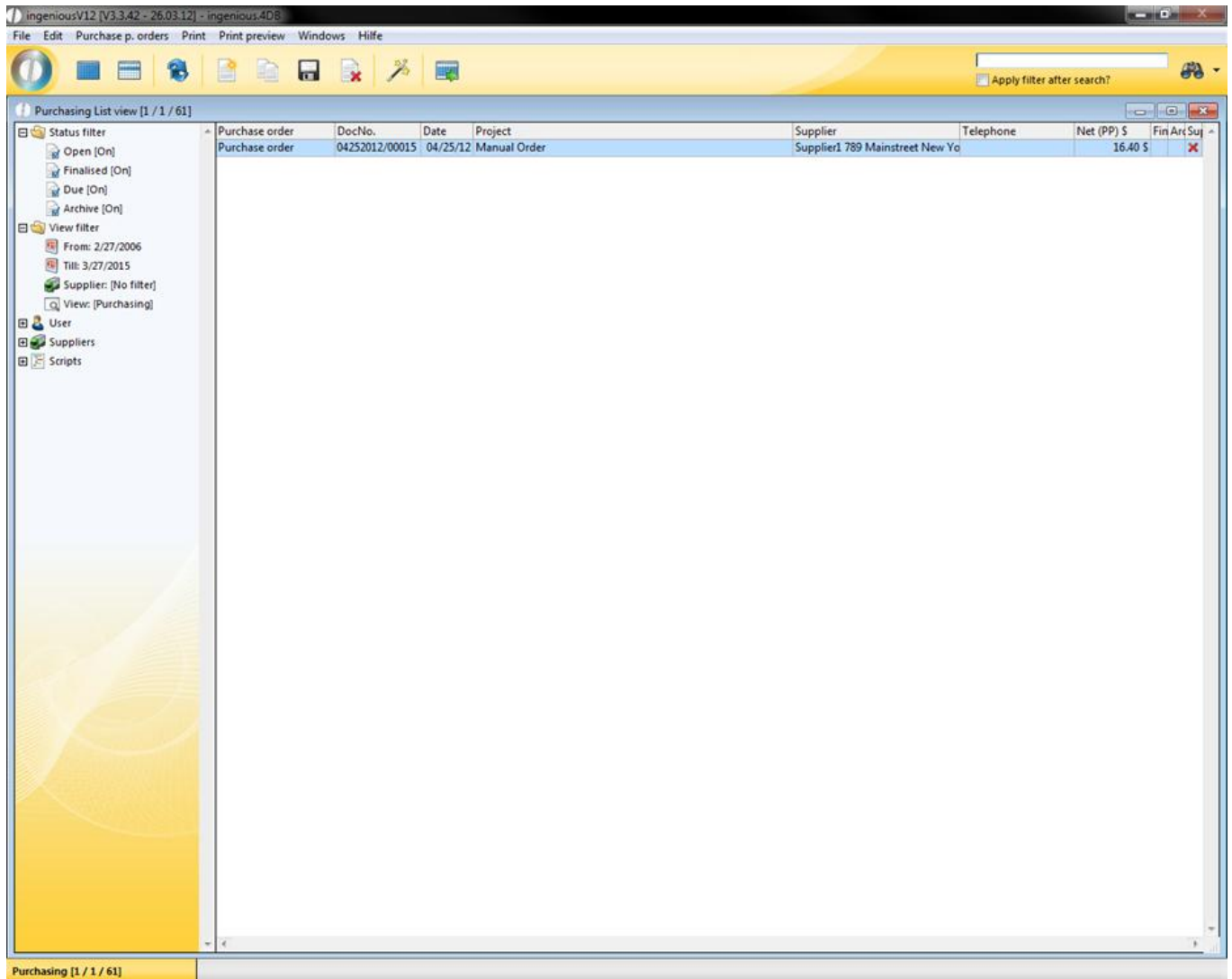
Item	Items	P.order no.	Name	Quantity	Flat pr.	Unit pr.	Total price	Stock	St. I.
001	AL Slat A200 WL smok		Slat: A200 vented aluminum color: smoky grey	1.00	0.82	16.40	16.40	0.00	
002			DF Item	5.00	0.00	0.00	0.00		

Footer text

[Purchase order 04252012/00015]

PP [USD] 16.40
SP [USD] 6,900.00

View of the complete items ordered



3.4.2 Purchase orders detail view

3.4.2.1 Miscellaneous data

Aside from the miscellaneous data that was transferred automatically in the settings, such as the order number, commission and delivery address, you can add more. If the goods were not directly ordered from the supplier, but delivered from another warehouse, then you can also add a shipping address or select one from the contact folder. You set the ordering and the requested delivery date yourself.

The screenshot displays the 'ingenious.V12' application window. The title bar indicates the version 'V3.3.42 - 26.03.12' and the database 'ingenious.408'. The menu bar includes 'File', 'Edit', 'Purchase p. orders', 'Print', 'Print preview', 'Windows', and 'Hilfe'. The toolbar contains icons for various functions. The main window is titled 'Projects detail view [Supplier1] - [Purchase order 04022012/00012]'. On the left, a sidebar lists 'Miscellaneous', 'Items', 'Documents and Notes', 'own fields', 'File attachments', and 'Print preview'. The main content area is divided into several sections: 'Miscellaneous project data' with fields for 'Number' (Purchase order 04022012/00012), 'Project' (one-family house), 'Subject', 'Order from' (04/02/2012), 'Requested delivery date' (04/04/2012), and 'City/Date' (Mesa, 4/2/2012). Below this is the 'Supplier address / Differing shipping address' section, showing 'Supplier' (Supplier1) and 'Addr.' (789 Mainstreet, Chicago 12345). The 'Internal control' section includes 'Terms of payment' (Money Transfer), 'terms of delivery', 'Contact person' (Aaron Admin), and a 'Notes' field with the text 'Document created with P.ord. assistant on 4/2/2012'. At the bottom, the 'Status change / Stock' section shows 'Status' (Finalised, Archived), 'Delivery status' (Fully delivered), 'Created' (4/2/2012 10:58:40 - admin), and 'Modified' (4/25/2012 14:03:14 - admin). A status bar at the very bottom shows '[Purchase order 04022012/00012]'.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Purchase p. orders Print Print preview Windows Hilfe

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

Miscellaneous project data

Number Purchase order 04022012/00012 Order from 04/02/2012

Project one-family house Requested delivery date 04/04/2012

Subject City/Date Mesa, 4/2/2012

Supplier address / Differing shipping address

Supplier Supplier1 Addr. 789 Mainstreet
Chicago 12345

Internal control

Terms of payment Money Transfer terms of delivery

Contact person Aaron Admin

Notes Document created with P.ord. assistant on 4/2/2012

Status change / Stock

Status ☐ Finalised ☐ Archived Delivery status Fully delivered

Created 4/2/2012 10:58:40 - admin Modified 4/25/2012 14:03:14 - admin

[Purchase order 04022012/00012]

3.4.2.2 Purchase order items

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items View Options Print Print preview Windows Hilfe

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

Header text

File Edit View Insert Style Colors Paragraph Format Tools

Normal Times New Roman 12 B U

{Salutation}

we order to the converted terms and conditions

Item	Items	P.order no.	Name	Quantity	Flat pr.	Unit pr.	Total price	Stock	St. b.
001	HV Blade no.3 16.5ft iv		HV Blade no.3 16.5ft Ivory	120.00	1.17	19.31	2,316.60	0.00	1,715.
002	Mini Felt FL 26027045GYW		Mini Felt (.270 x .260)	500.00	0.04	0.04	20.00	0.00	210.
003	HV #3 Long Screw FL 10N300TH84X		HV #3 Long Screw	2,000.00	0.13	0.13	260.00	0.00	2,134.
004	HV CENTERMATE no.141-IV-421		HV CENTERMATE no.1 20ft, color: Ivory	6.00	2.81	56.20	337.20	0.00	83.
005	HV CENTERMATE no.141-WH-421		HV CENTERMATE no.1 20ft, color: white	6.00	2.81	56.20	337.20	0.00	111.
006	HV CEILING HEADER N 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	2.84	56.80	227.20	0.00	45.
007	HV CEILING HEADER N 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	8.00	2.84	56.80	454.40	0.00	18.
008	HV 90/180 STARTER 2X 41-IV-415		HV 90/180 STARTER 20ft, color: Ivory	14.00	0.82	16.40	229.60	0.00	228.
009	Mini Felt 26027045GYW		Mini Felt (.270 x .260)	500.00	0.04	0.04	20.00	0.00	520.
010	HV CENTERMATE no.141-WH-421		HV CENTERMATE no.1 20ft, color: white	12.00	2.81	56.20	674.40	0.00	260.
011	HV CEILING HEADER N 41-IV-424		HV CEILING HEADER No.1 20ft, color: Ivory	4.00	2.84	56.80	227.20	0.00	100.
012	HV CEILING HEADER N 41-WH-424		HV CEILING HEADER No.1 20ft, color: white	4.00	2.84	56.80	227.20	0.00	100.

PP [USD] 5,331.00
SP [USD] 28,949.80

File Edit View Insert Style Colors Paragraph Format Tools

Normal Times New Roman 12 B U

Please send us an order confirmation.
Thank you!

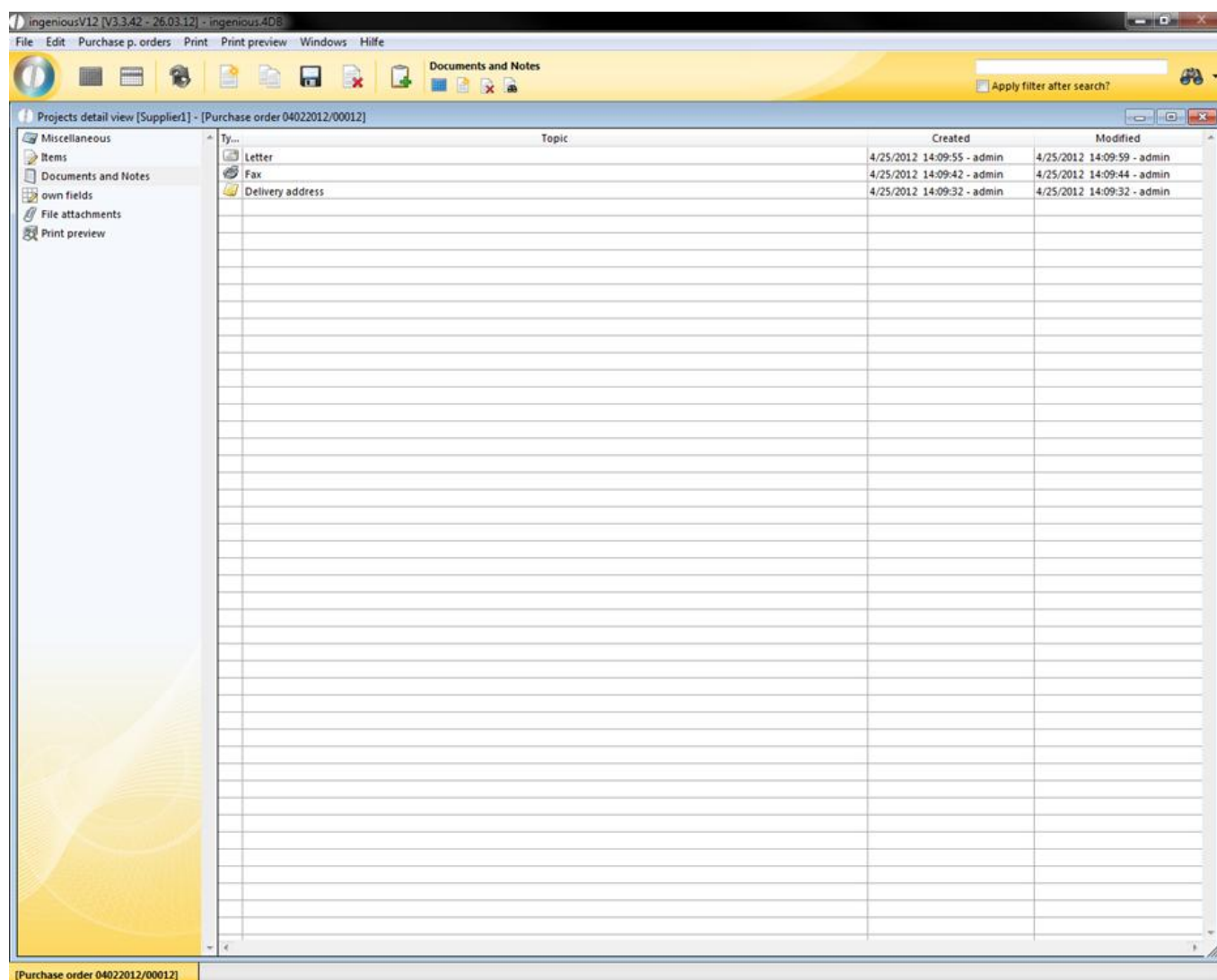
Footer text

[Purchase order 04022012/00012]

The entry of different items of an order functions exactly the same as the input of the project items in the workflow. You can insert any item and complement the order with the header and footer text.

3.4.2.3 Purchase orders documents and notes

You already know the column, "Documents & Notes" from the "Contacts" module and the modules of the workflow. Here you can provide and store different documents, with the advantage that you tie the necessary documents directly to your order, and that you have an overview of the entire communication regarding the order. The only difference to the contact module is that you cannot add field service activities to the order. The creation of a note, fax or a letter will therefore not be dealt with in greater detail here.



3.4.2.4 Own purchase orders fields

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Purchase p. orders Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

Miscellaneous
Items
Documents and Notes
Own fields
File attachments
Print preview

texts

individual_text_1
individual_text_2
individual_text_3
individual_text_4
individual_text_5

numbers

individual_number_1 0
individual_number_2 0
individual_number_3 0
individual_number_4 0
individual_number_5 0

checkboxes

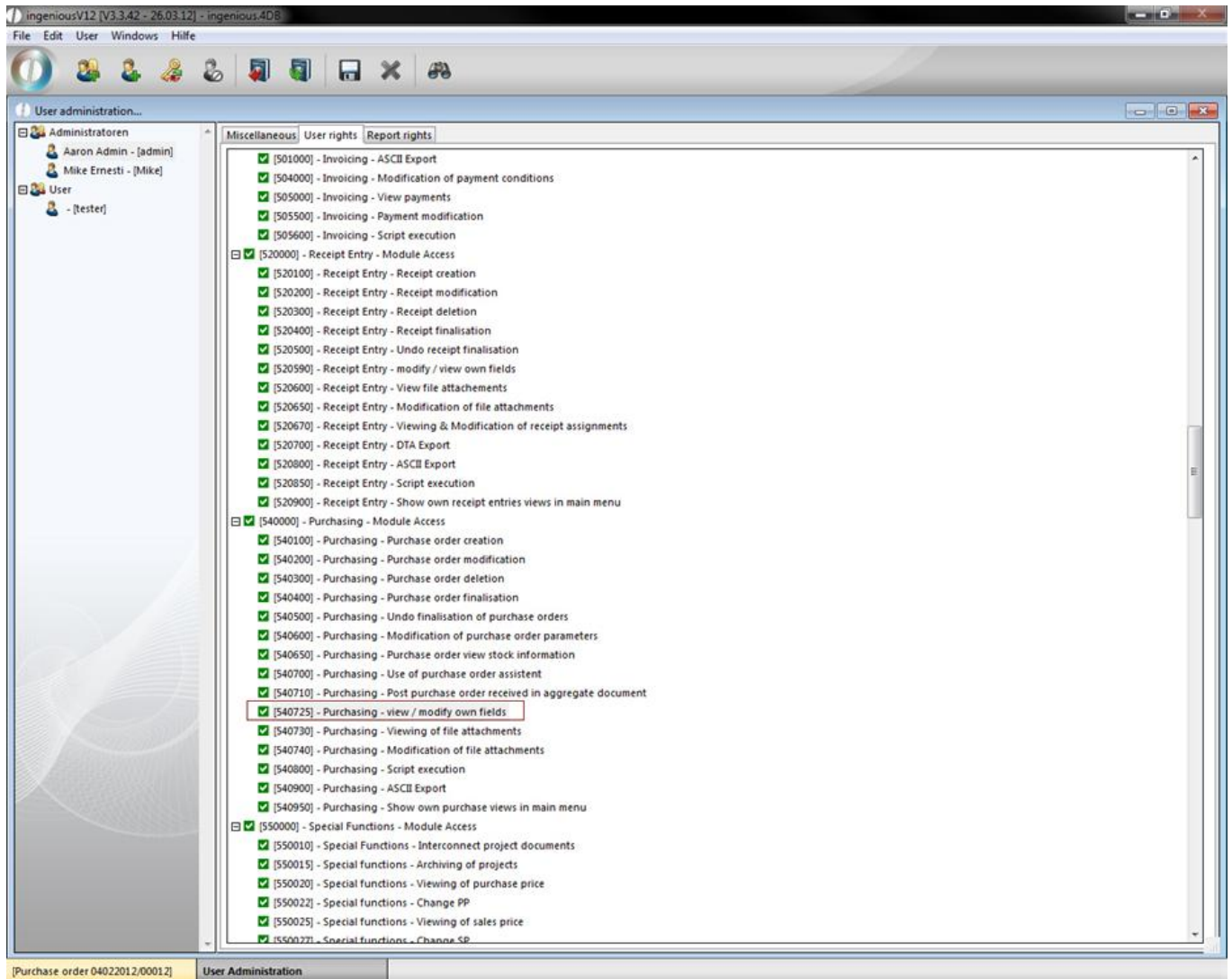
individual_check_1
individual_check_2
individual_check_3
individual_check_4
individual_check_5

Dates

individual_date_1 00/00/00
individual_date_2 00/00/00
individual_date_3 00/00/00
individual_date_4 00/00/00
individual_date_5 00/00/00

[Purchase order 04022012/00012]

You already know the detail area "Own fields" from the "Contacts" module, which is therefore only to be described therefore here briefly. The column "Own fields" makes it possible for you to add individual notes for you projects. In order to be able to use the area, one must first unlock first the user rights and sign on again.



You can rename the different text fields, figure fields, checkboxes and date specifications for individual entries.

3.4.2.5 Purchase orders file attachments

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Purchase p. orders Print Print preview Windows Hilfe

Print preview
Order confirmation

Apply filter after search?

Projects detail view [Supplier1] - [Purchase order 04022012/00012]

Miscellaneous
Items
Documents and Notes
own fields
File attachments
Print preview

File Edit View Insert Style Colors Paragraph Format Tools

Normal Arial 25

ingenious Shutters

Outsource For Windows - 534 East Southern Ave. Suite 104 - Mesa, Arizona 85204

Supplier1
789 Mainstreet
Chicago 12345

Salesman:	Tom Right
Project:	one-family house
	Mesa, 4/2/2012

Purchase order 04022012/00012

Dear Mr. & Mrs.

Thank you very much for giving us the opportunity to present this quote to you.

Item	Product	Qty	Unit Price \$	Extend. Price \$
001	HV Blade no.3 16.5ft Ivory FL 345302-02 - Length: 198"	120.00	19.31	2,316.60
002	Mini Felt FL 130200-00 - Size 12.00 inch	500.00	0.04	20.00
003	HV #3 Long Screw FL 343003-00 -	2,000.00	0.13	260.00
004	HV CENTERMATE no.1 20ft Ivory FL 341400-02 - Length: 240"	6.00	56.20	337.20
005	HV CENTERMATE no.1 20ft white FL 341400-01 - Length: 240"	6.00	56.20	337.20
006	HV CEILING HEADER No.1 20ft Ivory FL 340000-02 - Length: 240"	4.00	56.80	227.20
007	HV CEILING HEADER No.1 20ft white FL 340000-01 - Length: 240"	8.00	56.80	454.40
008	HV 90/180 STARTER 20ft Ivory FL	14.00	16.40	229.60

Page 1 1/2 Line 21, Col 1

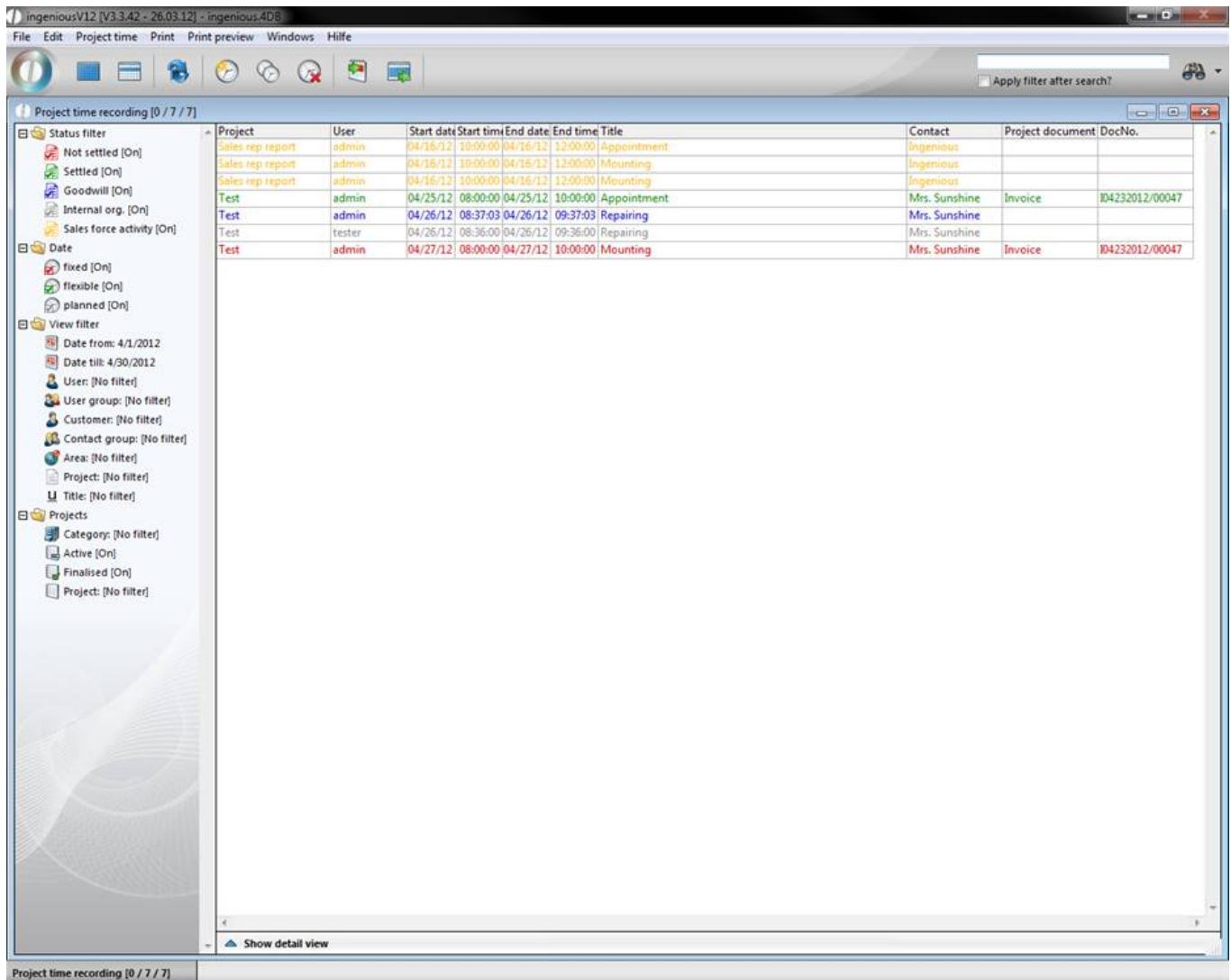
NUM CAPS

[Purchase order 04022012/00012]

4 Management tools

4.1 Time management

With the help of the time management (also known under the concept "Project time recording") all working hours of the company are rendered transparent. For a better overview work procedure colors are assigned according to the calculability.



Color scheme used:


Green = Settled

Red = Not settled

Blue = Godwill - Not billable

Grey = Internal administration - Not billable

Yellow = Field work

To grasp a time involved, click on the  button or press the F4 function key on your keyboard. In the next window, you have the possibility to choose a project to start again.

The screenshot shows the ingenious.V12 software interface. The main window is titled 'Project time recording [0 / 7 / 7]'. It features a sidebar with various filters and a main table of project time entries. A 'Project time for:' dialog box is open, allowing users to select a resource, employee, start/end dates, and project details.

Project time recording [0 / 7 / 7]

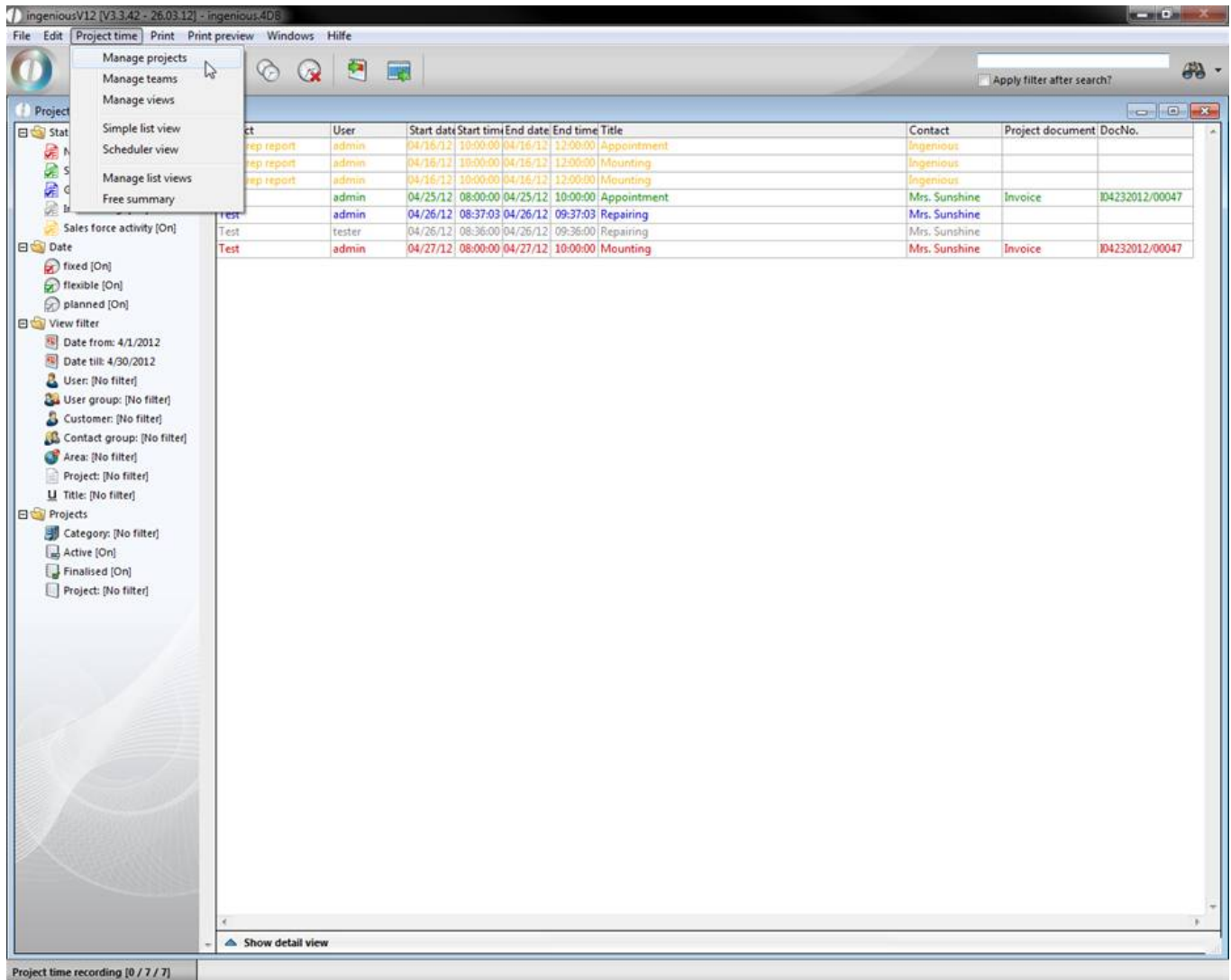
Project	User	Start date	Start time	End date	End time	Title	Contact	Project document	DocNo.
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Appointment	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious		
Test	admin	04/25/12	08:00:00	04/25/12	10:00:00	Appointment	Mrs. Sunshine	Invoice	ID4232012/00047
Test	admin	04/26/12	08:37:03	04/26/12	09:37:03	Repairing	Mrs. Sunshine		
Test	tester	04/26/12	08:36:00	04/26/12	09:36:00	Repairing	Mrs. Sunshine		
Test	admin	04/27/12	08:00:00	04/27/12	10:00:00	Mounting	Mrs. Sunshine	Invoice	ID4232012/00047


Project time for:

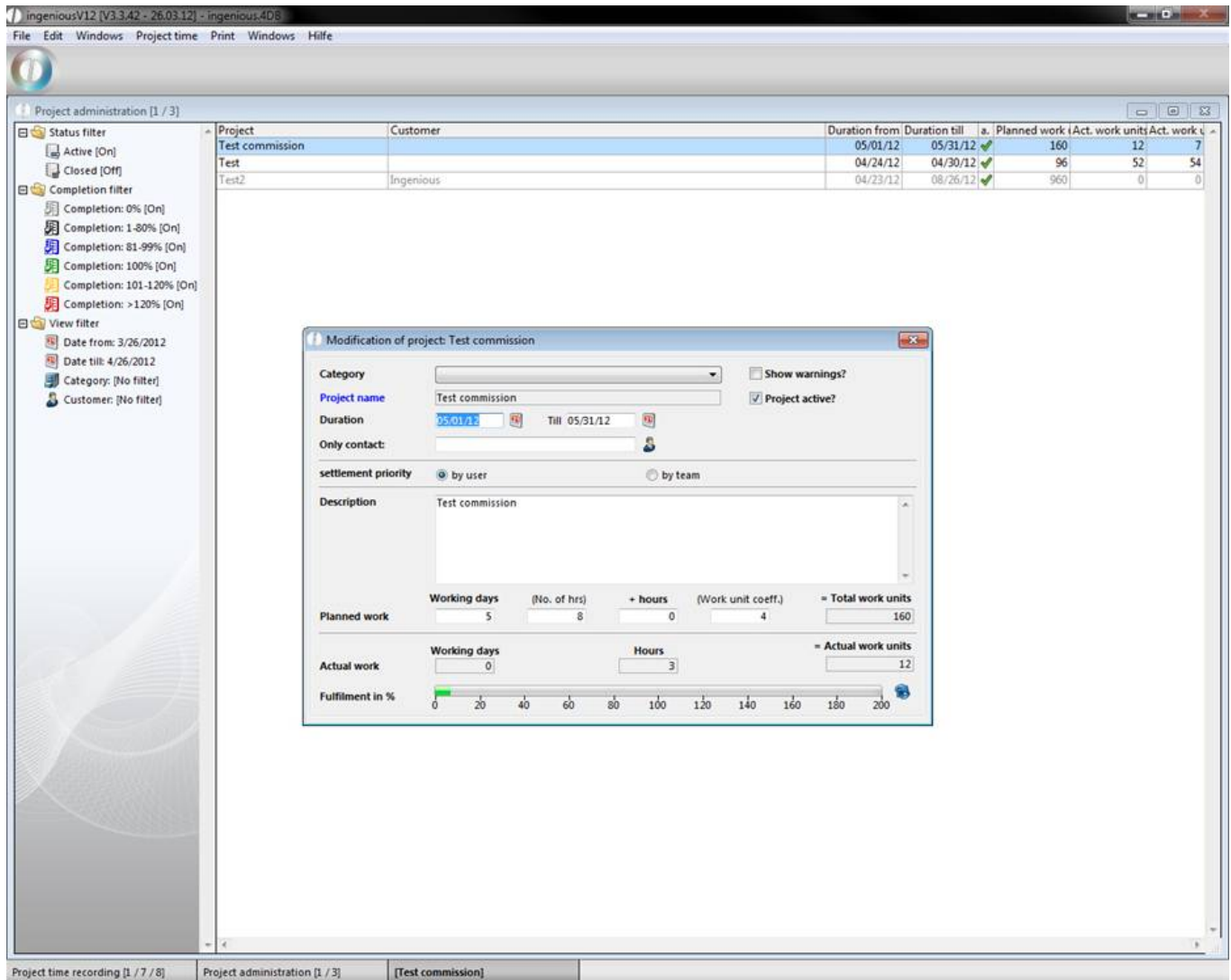
Resource: User
Employee: admin
Start: 04/26/12 08:44:33
End: 04/26/12 09:44:33
Reminder: No reminder
Title: Text
linked with: Document project
Billed to: Save times into the project
Status: Not settled 00:00:00
Created: 4/26/2012 08:44:33 - admin Modified: 4/26/2012 08:44:33 - admin

The choice of an already available project occurs through the folding "Project" list field.

To start a new project, you can manage with the "Project time / Projects" menu.



The "Project Management" window opens, and by clicking on the  button, you can create a new commission. Next, you fix the desired committee name and the time period. Then you have to bind the possibility of the project directly to a customer. In the "Description" field, you can more precisely explain the project. In the area, "Planning expenditure", you determine the number of the working days and the hours according to how high the weekly working time summary should be. In the areas, "Actual Status" and "Fulfillment in %", you already have an overview of whether the working time summary is operating according to plan.



In the project time entry you have two possibilities to gather the used working hours. You manually provide the time in the fields "Start time" and "End time". The automatically measured time by Ingenious.V12 is given as a working hour unit per 15 minutes. All-day accrued work can be noted by highlighting the field "All-day". Titles and text of the job performance are given individually in the suitable fields.

The settings that are selected in the "Status" selection field, determine the latter color representation of the time involved.

The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.406 application window. The main window shows a 'Project time recording' table with columns: Project, User, Start date, Start time, End date, End time, Title, Contact, and Project document. A modal dialog titled 'Project time for Test commission' is open, showing details for a specific entry.

Project	User	Start date	Start time	End date	End time	Title	Contact	Project document	DocNo.
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Appointment	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious		
Test	admin	04/25/12	08:00:00	04/25/12	10:00:00	Appointment	Mrs. Sunshine	Invoice	004232012/00047
Test	admin	04/26/12	08:37:03	04/26/12	09:37:03	Repairing	Mrs. Sunshine		
Test	tester	04/26/12	08:36:00	04/26/12	09:36:00	Repairing	Mrs. Sunshine		
Test	admin	04/27/12	08:00:00	04/27/12	10:00:00	Mounting	Mrs. Sunshine	Invoice	004232012/00047
Test commission	tester	05/10/12	10:00:00	05/10/12	13:00:00	Mounting	Ingenious	Order confirmation	004232012/00071

The 'Project time for Test commission' dialog shows the following details:

- Resource: User
- Employee: tester
- Start: 05/10/12 10:00:00
- End: 05/10/12 13:00:00
- Reminder: No reminder
- Title: Mounting
- Text: Mounting
- linked with: Order confirmation 04232012/000
- Document project: test 43
- Billed to: Ingenious
- Status: Not settled (dropdown menu is open showing options: Not settled, Settled, Internal administration - not billable, Goodwill - not billable)
- Created: 04/23/12

Creating a sales rep activity

In the Time Management, you can put a field service appointment in the list view. Next, the corresponding report right, "Time Recording – Sales rep appointments" has to be unlocked in the user administration. In order to create a field service appointment, you only need to hold the Alt key when creating a project entry.

The screenshot shows the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.406 application window. The main window displays a list view of project time recording data. On the left, there is a sidebar with various filters and view options. The main area shows a table with columns: Project, User, Start date, Start time, End date, End time, Title, Contact, and Project document. A 'Sales rep activity' dialog box is open, showing details for a specific activity.


Project	User	Start date	Start time	End date	End time	Title	Contact	Project document	DocNo.
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Appointment	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious		
Sales rep report	admin	04/16/12	10:00:00	04/16/12	11:00:00	Mounting	Ingenious		
Test	admin	04/25/12	08:00:00	04/25/12	10:00:00	Appointment	Mrs. Sunshine	Invoice	004232012/00047
Test	admin	04/26/12	08:37:03	04/26/12	09:37:03	Repairing	Mrs. Sunshine		
Test	tester	04/26/12	08:36:00	04/26/12	09:36:00	Repairing	Mrs. Sunshine		
Test	admin	04/27/12	08:00:00	04/27/12	10:00:00	Mounting	Mrs. Sunshine	Invoice	004232012/00047
Test commission	tester	05/10/12	10:00:00	05/10/12	13:00:00	Mounting	Ingenious	Order confirmation	004232012/00071

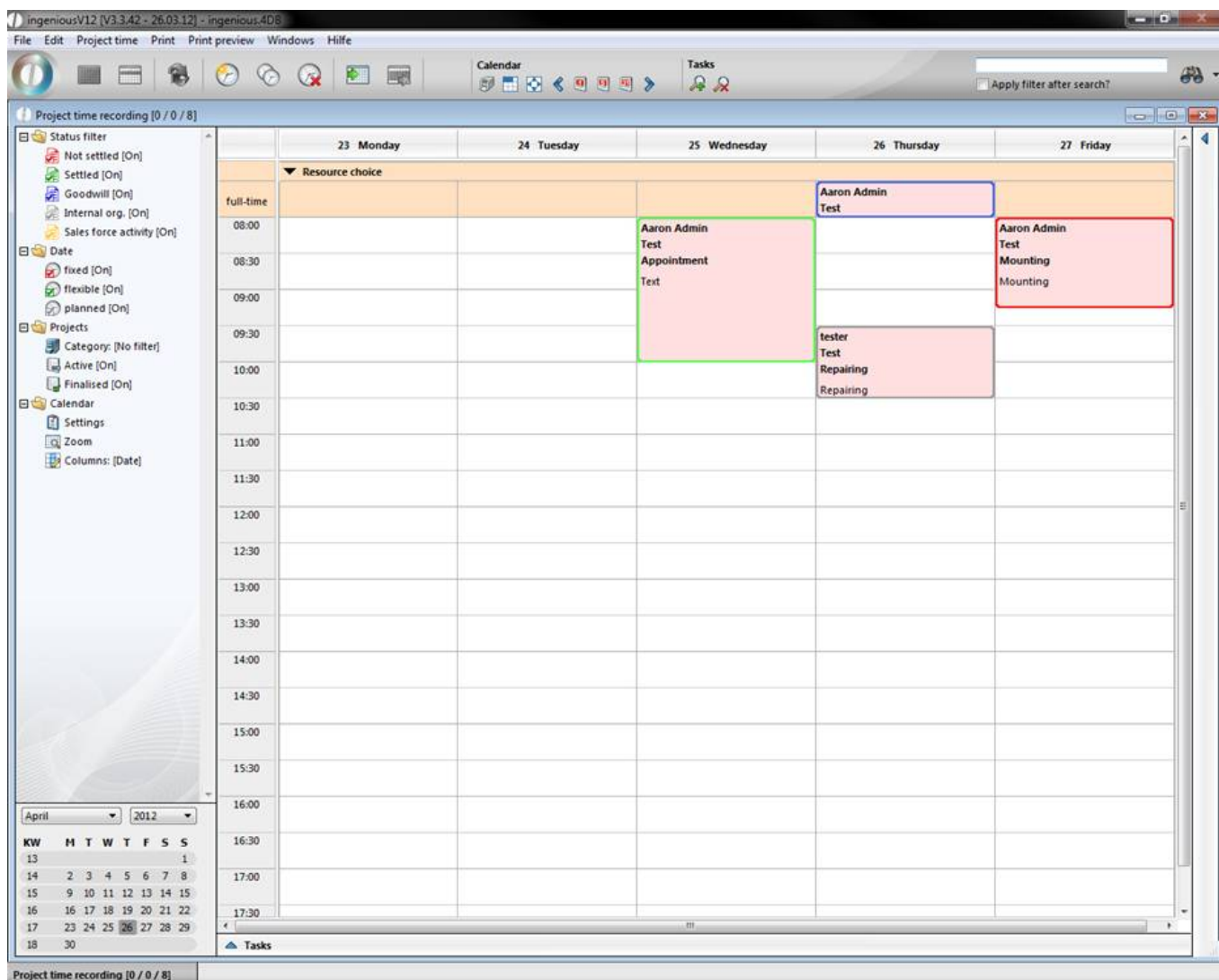
The 'Sales rep activity' dialog box shows the following details:

- Responsible: admin
- Creator: admin
- Contact: Tom Customer
- Title: Mounting
- City: Chicago
- Date: 04/16/12
- Beginning: 10 o'clock :00 min
- Duration: 02 hr :00 min
- ☒ Leave note with customer
- ☐ Leave date with customer
- Text: Demo
- Created: 4/16/2012 10:45:18 - admin
- Modified: 4/16/2012 10:45:43 - admin

List view /Calendar view

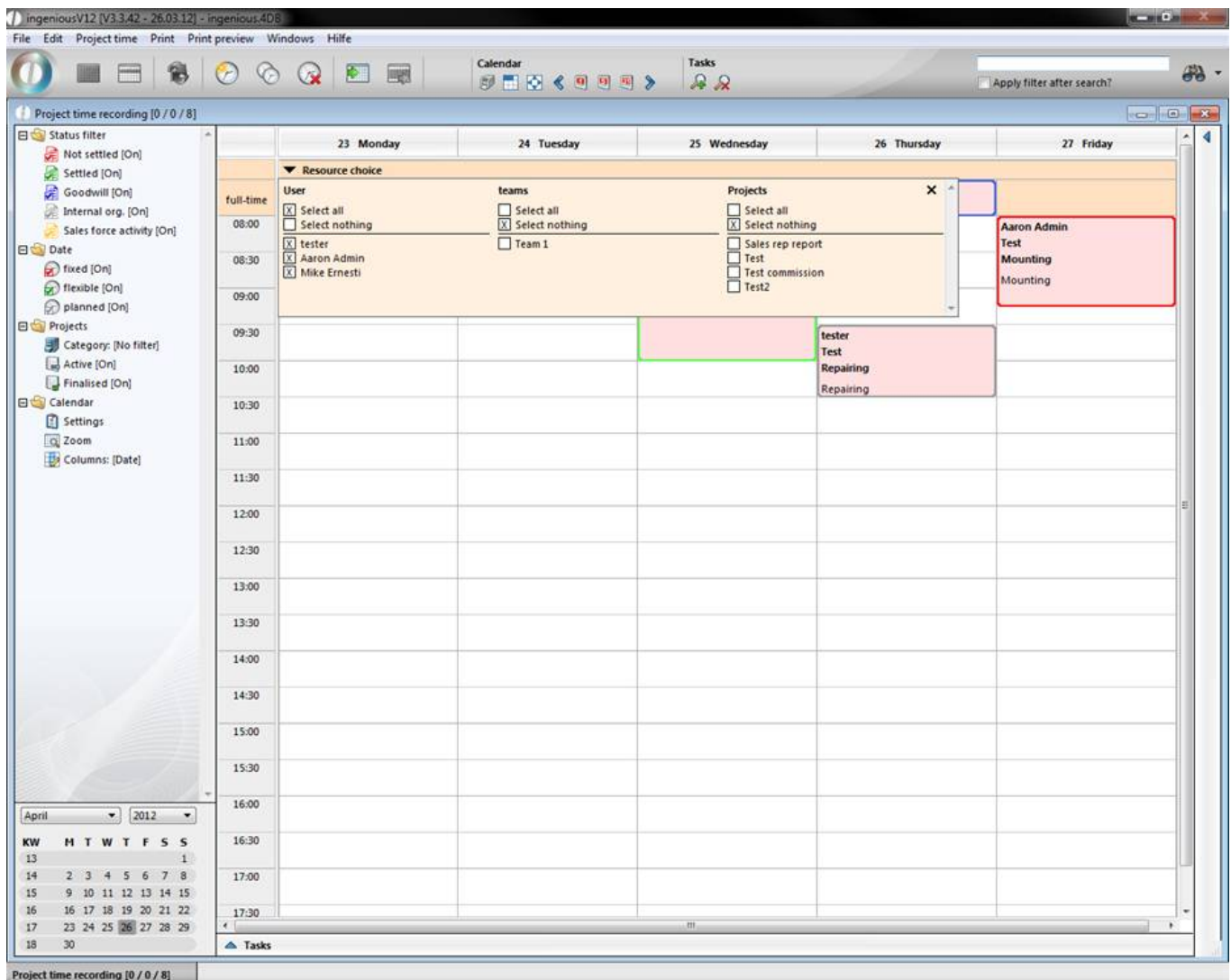



By clicking the button  you will switch from the list view to the calendar view. In the calendar view you will find potential overlapping dates quicker. Also when you have got a postponement you change the dates really convenient by drag and drop.

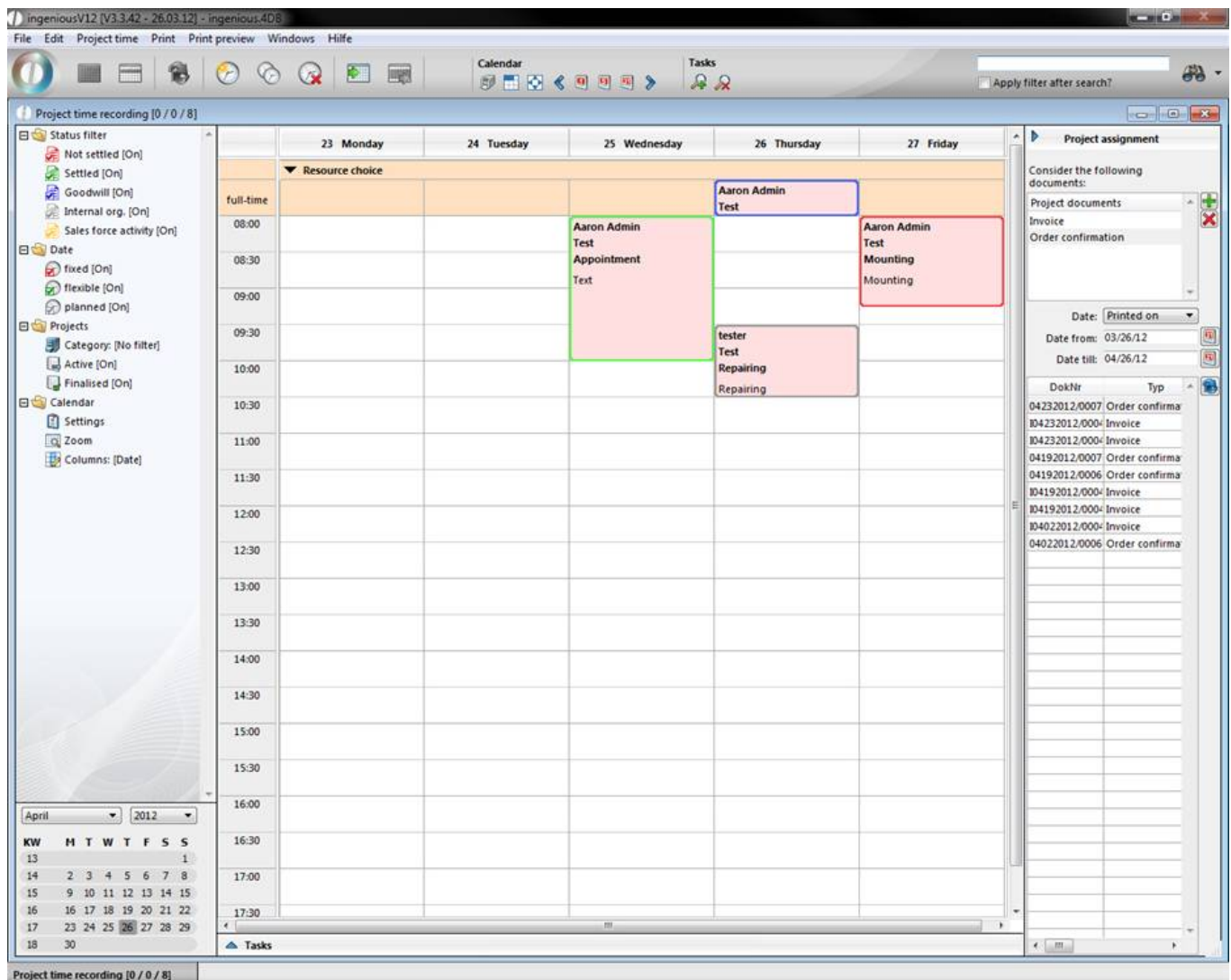



In order to get the exact overview that you need, numerous filter possibilities as in the list view are available to you. The filters are divided into three areas that include status filter, view filter and calendar. To list the project times, for instance, according to user, select the "Calendar" category and the respective "User" menu entry in the "Columns" filter.

When you click on **▼ Resource choice** a pop up window will be displayed where all users, teams and commissions are listed. Here you have got the possibility to filter these resources.



When you click on  to the right of the scroll bar the project assignment will open up. Here you can view all projects that are bind to a date in a certain time frame.



Below the calendar view you can find a list of all tasks by clicking  **Tasks**. The information will be shown, which priority belongs to the task, whether a memo was sent to the employee or not, the date of creation, due date, subject, whether it is finished, whether the employee will be reminded and who has created the task.

The screenshot displays the ingenious.V12 software interface. The main window is titled "Project time recording [0 / 0 / 8]". It features a calendar view for the week of 23 Monday to 27 Friday. The calendar shows resource assignments for "Aaron Admin" and "tester" across various time slots. A sidebar on the left contains filters for Status, Date, Projects, Calendar, and Tasks. A bottom section shows a list of tasks with columns for Priority, Memo, Created, Due, Subject, Finished, Reminder, and Responsible. A right sidebar shows project assignment details and a list of documents.

Project time recording [0 / 0 / 8]

Calendar View:

Time	23 Monday	24 Tuesday	25 Wednesday	26 Thursday	27 Friday
08:00				Aaron Admin	
08:30					
09:00			Aaron Admin Test Appointment Text		Aaron Admin Test Mounting Mounting
09:30					
10:00				tester Test Repairing	
10:30					
11:00					
11:30					
12:00					
12:30					
13:00					
13:30					
14:00					
14:30					
15:00					
15:30					

Tasks List:

Priority	Memo	Created	Due	Subject	Finished	Reminder	Responsible
		9/19/2007	9/19/2007 - 09:00:00	Customer: Everybody [5531]			
		9/19/2007	9/18/2007 - 09:00:00	Customer: Awning Store [5533]			
		9/19/2007	9/19/2007 - 12:00:00	lunch			
		9/19/2007	9/19/2007 - 15:00:00	inhouse meeting			
		9/19/2007	9/21/2007 - 10:00:00	Order confirmation: shutters [04272007.00032]			Aaron Admin
		6/22/2006	6/27/2006	Mr. and Mrs. Charles Dickens. Call to schedual a s	✓		
		6/22/2006	6/27/2006	Contacts: Dickens Charles [4690]	✓		
		6/22/2006	6/27/2006	Please give O' Brien Construction a call for a bottc	✓		

Project assignment:

Consider the following documents:

- Project documents
- Invoice
- Order confirmation



Date: Printed on

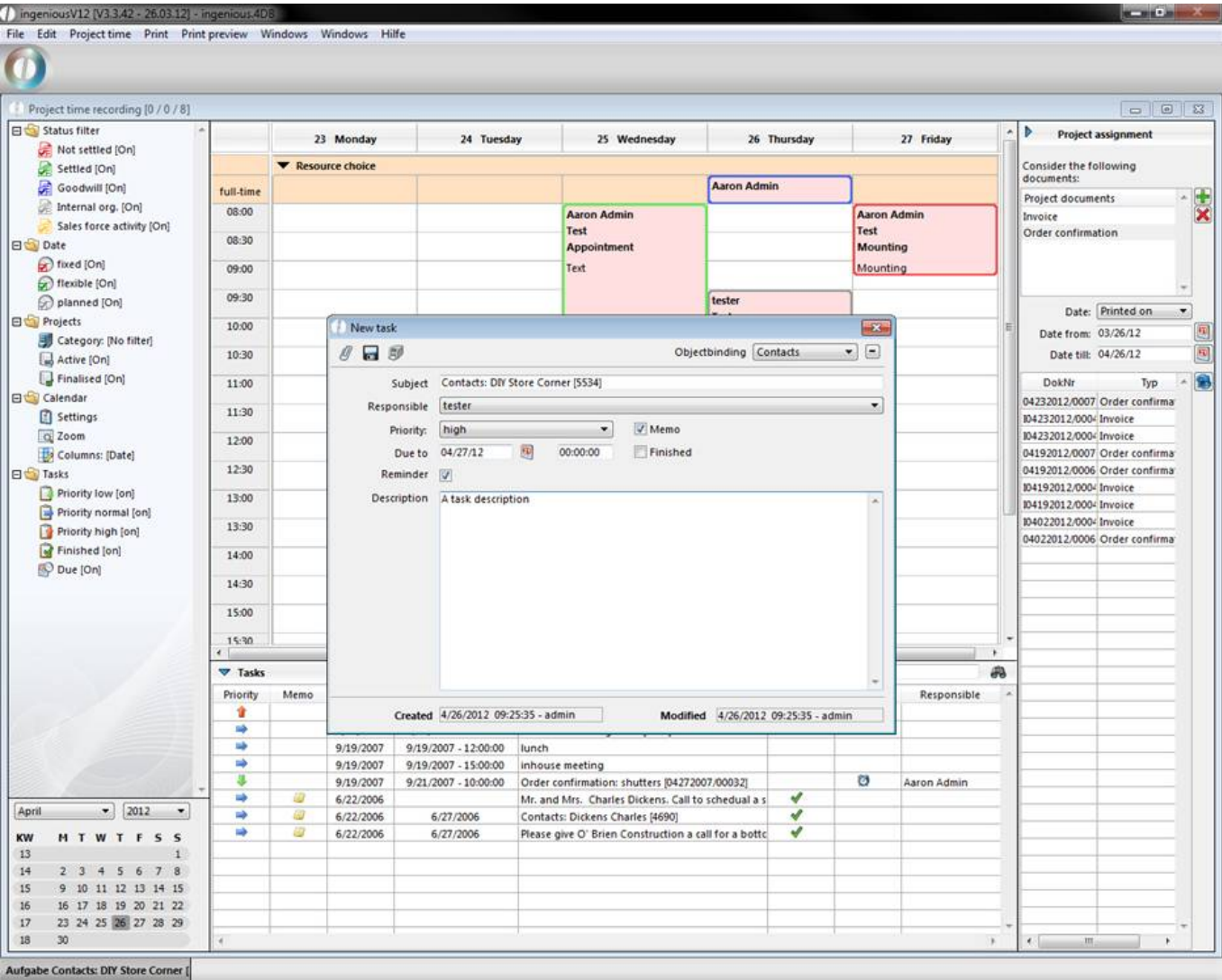
Date from: 03/26/12

Date till: 04/26/12

DokNr Typ

04232012/0007	Order confirma
04232012/0004	Invoice
04232012/0004	Invoice
04192012/0007	Order confirma
04192012/0006	Order confirma
04192012/0004	Invoice
04192012/0004	Invoice
04022012/0004	Invoice
04022012/0006	Order confirma

To create a new task you have to click on . In the new window you have to bind the task to an object (contact, item, project or purchase), which will be mentioned in the subject line. With the help of the button , you can switch to the corresponding attachment.



The screenshot displays the ingenious.V12 software interface. The main window is titled "Project time recording [0 / 0 / 8]". It features a calendar view for the week of 23 Monday to 27 Friday. The calendar shows resource assignments for "Aron Admin" and "tester". The "Aron Admin" resource is assigned to "Test Appointment Text" on Wednesday and "Test Mounting Mounting" on Friday. The "tester" resource is assigned to "Test Repairing" on Thursday. The calendar also shows a "full-time" resource choice for the week.

Below the calendar is a "Tasks" table with the following columns: Priority, Memo, Created, Due, Subject, Finished, Reminder, and Responsible. The table lists several tasks, including "Customer: Everybody [5531]", "Contacts: DIY Store Corner [5534]", "Customer: Awning Store [5533]", "lunch", "inhouse meeting", "Order confirmation: shutters [04272007/00032]", "Mr. and Mrs. Charles Dickens. Call to schedual a s", "Contacts: Dickens Charles [4690]", and "Please give O' Brien Construction a call for a bottc".

On the right side of the interface, there is a "Project assignment" panel. It includes a section for "Consider the following documents:" with a list of project documents: Invoice, Order confirmation, and Order confirmation. Below this, there is a "Date" dropdown set to "Printed on", a "Date from" field set to "03/26/12", and a "Date till" field set to "04/26/12". At the bottom of the panel, there is a table with columns "DokNr" and "Typ", listing various documents and their types.

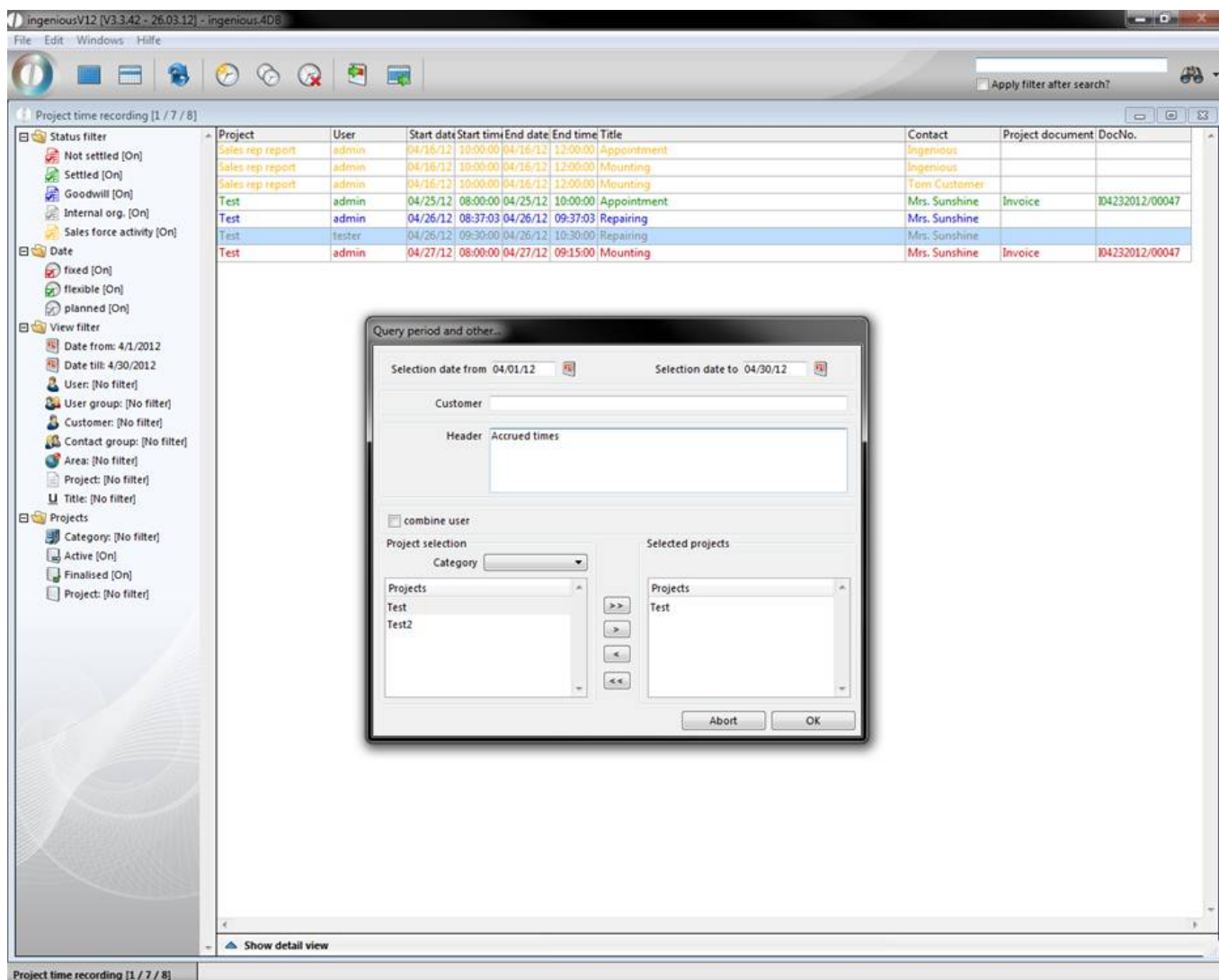
A created task can be deleted by selecting it and clicking on

Print options

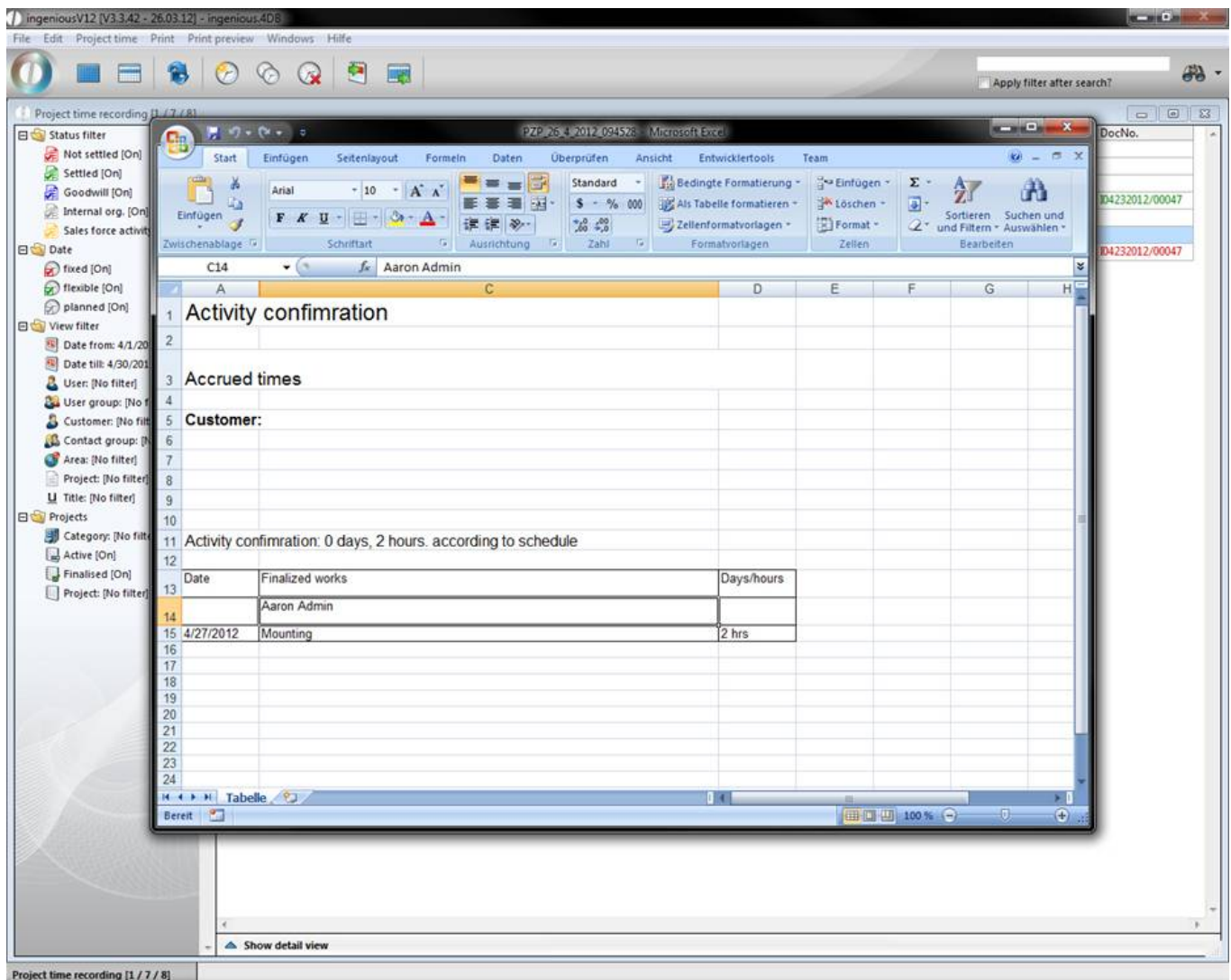
There are three print options in Time Management. If not all three are shown, please select your report rights in the user administration.

Project	User	Start date	Start time	End date	End time	Title	Contact	Project document: DocNo.
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Appointment	Ingenious	
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Ingenious	
Sales rep report	admin	04/16/12	10:00:00	04/16/12	12:00:00	Mounting	Teen Customer	
Test	admin	04/25/12	08:00:00	04/25/12	10:00:00	Appointment	Mrs. Sunshine	Invoice ID4232012/00047
Test	admin	04/26/12	08:37:03	04/26/12	09:37:03	Repairing	Mrs. Sunshine	
Test	tester	04/26/12	09:30:00	04/26/12	10:30:00	Repairing	Mrs. Sunshine	
Test	admin	04/27/12	08:00:00	04/27/12	09:15:00	Mounting	Mrs. Sunshine	Invoice ID4232012/00047

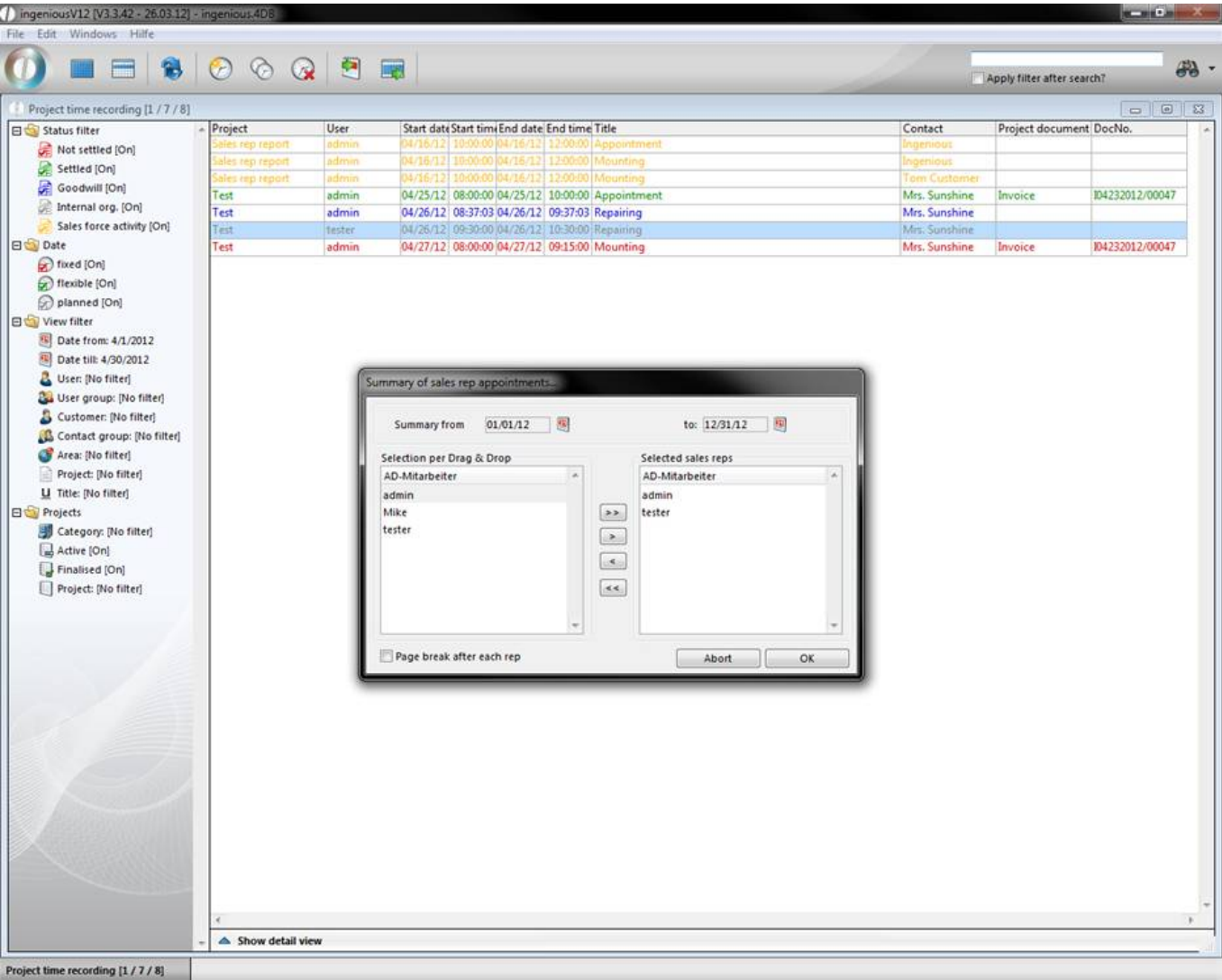
You can create a settlement of all collected service hours with "Project Time Recording – Accrued times" and print it out. In the window that appears, you have the possibility to determine the settlement period and to select one or several projects. In addition, you can also allow the work expense to be given out in relation to a customer and provide a heading for the list.

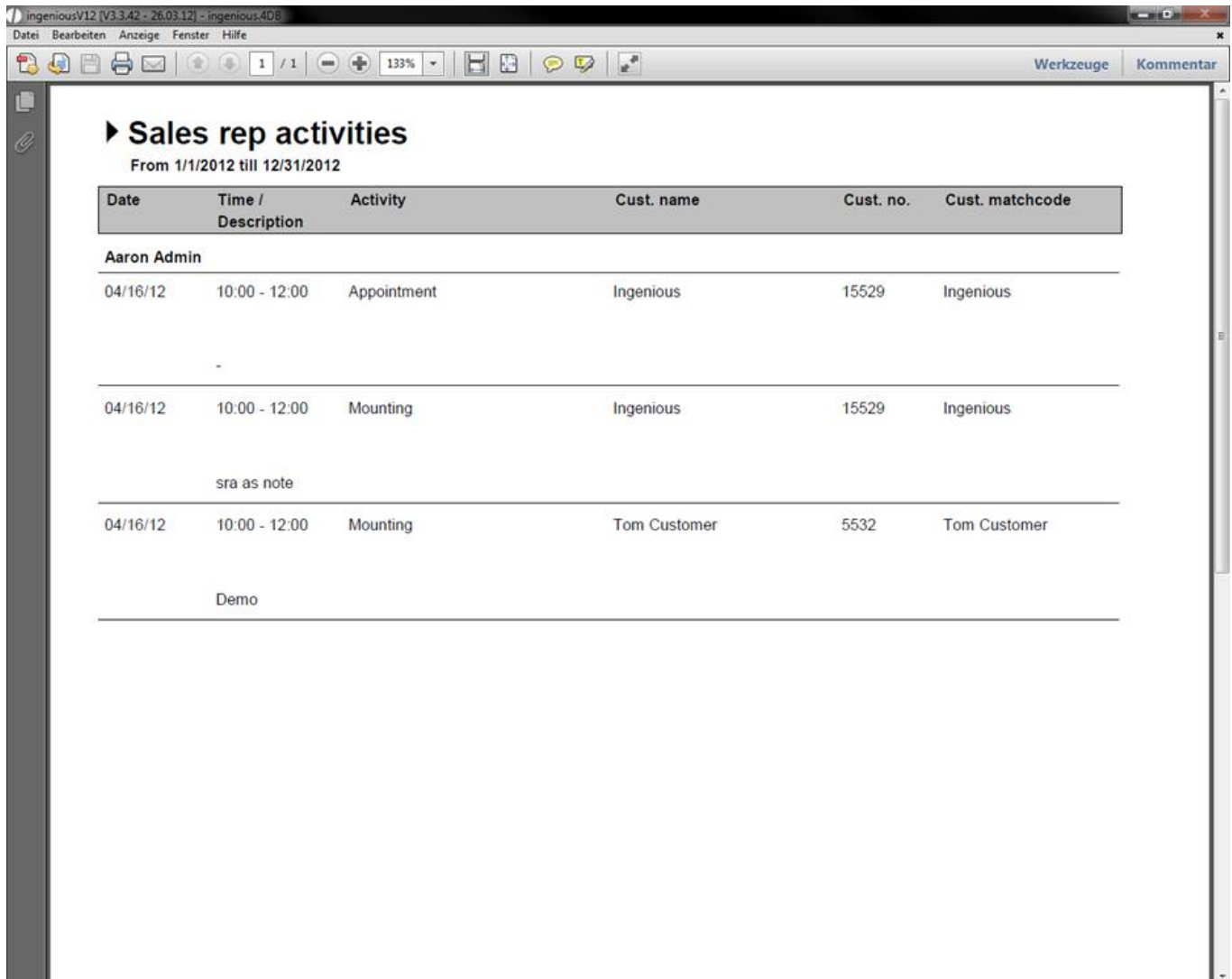


If you have selected and confirmed the necessary settings, the Microsoft Excel program begins with the help of the file "PZP_Template.xml". The XML file is entered in the client list of Ingenious.V12 and can be adapted if necessary. In the Excel table, all work hours are automatically listed and added up. You can insert one more text and then print out the activity report as usual.



Under the print option "Project Time Recording – Sales rep appointments", you can print out all field service appointments from a time period. Before printing, the considered time period and the respective employees must be determined.





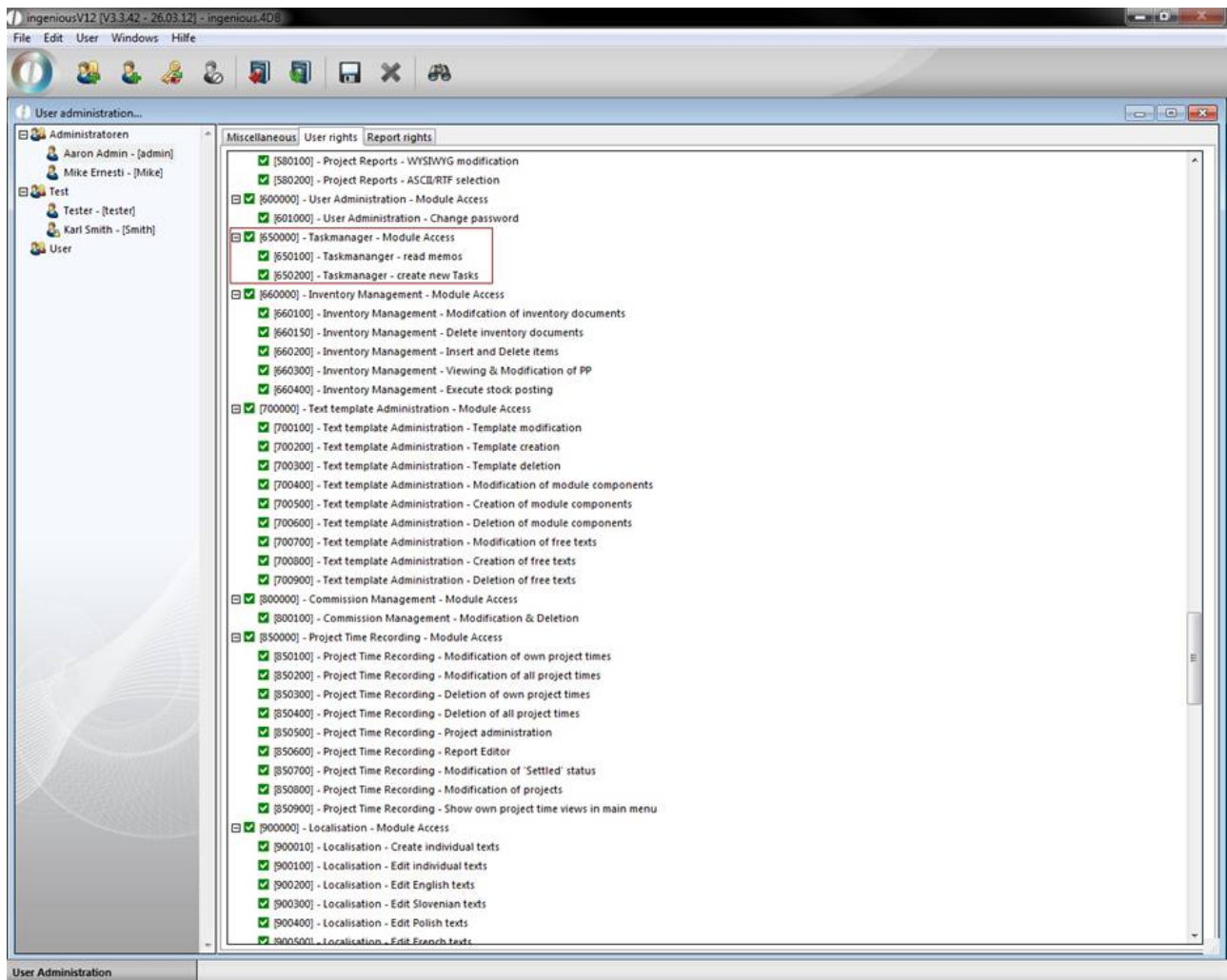
The screenshot displays the 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408' window. The menu bar includes 'Datei', 'Bearbeiten', 'Anzeige', 'Fenster', and 'Hilfe'. The toolbar contains various icons for file operations and viewing. The main content area is titled 'Sales rep activities' with a subtitle 'From 1/1/2012 till 12/31/2012'. It features a table with the following columns: 'Date', 'Time / Description', 'Activity', 'Cust. name', 'Cust. no.', and 'Cust. matchcode'. The table lists activities for 'Aaron Admin' on 04/16/12, including 'Appointment' and 'Mounting' for 'Ingenious' (Cust. no. 15529), and another 'Mounting' activity for 'Tom Customer' (Cust. no. 5532). There are also notes like 'sra as note' and 'Demo'.

Date	Time / Description	Activity	Cust. name	Cust. no.	Cust. matchcode
Aaron Admin					
04/16/12	10:00 - 12:00	Appointment	Ingenious	15529	Ingenious
-					
04/16/12	10:00 - 12:00	Mounting	Ingenious	15529	Ingenious
sra as note					
04/16/12	10:00 - 12:00	Mounting	Tom Customer	5532	Tom Customer
Demo					

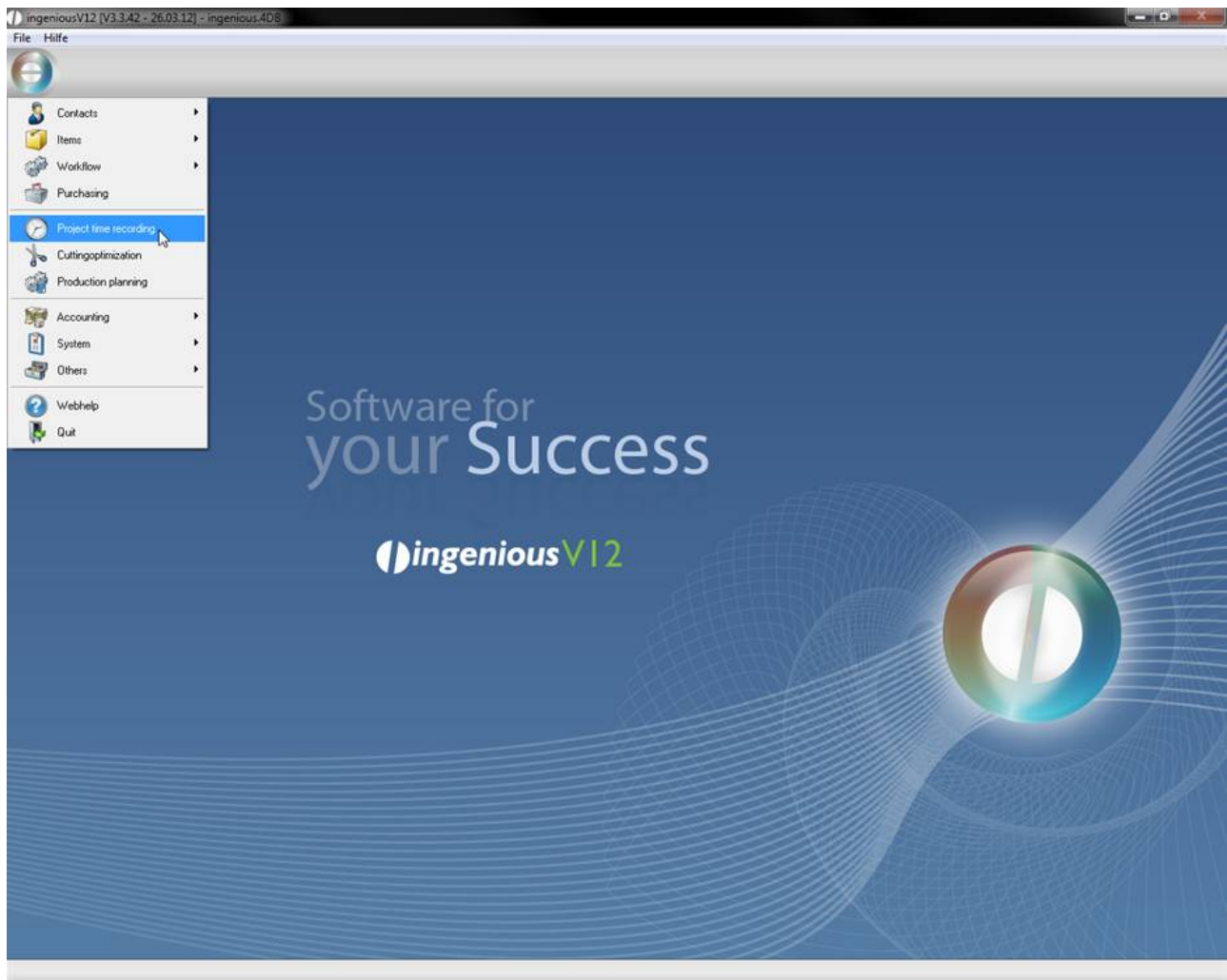
The print option, "Project time planning – Invoice attachment" has not been added since it is still being developed.

4.2 Task manager

The Task Manager facilitates the delegation and termination of tasks to employees. In order to be able to use the Task Manager, you must clear the appropriate rights in the user administration and restart the program.



The taskmanager where you can delegate and plan tasks you can open by clicking project time recording in the main menu.



In the following illustration, the Task Manager has been allocated with several tasks for a better understanding.

In the "Priority" column, the priority of a task is displayed (↓ low, → normal, ↑ high). In addition, tasks with a high priority are displayed in red. In the "Memo" column, the 📧 icon indicates which task has been sent as a memo to all employees. The "Created" and "Due" columns show when a task has been created or until when it should be completed. The subject column illustrates to which object the task has been attached. In the "Finished" column, the already completed tasks are indicated with a ✅ checkmark. In the "Reminder" column, the alarm clock icon ⌚ indicates that a report has been sent to the responsible operator on the due date of the task. The name of the operator is listed in the last column. The Task Manager also has its individual search function. In the following illustration you will find a short description of the different function buttons.



Create a new task



Delete a task



Print the list view



Display/Remove tasks with a low priority



Display/Remove tasks with normal priority



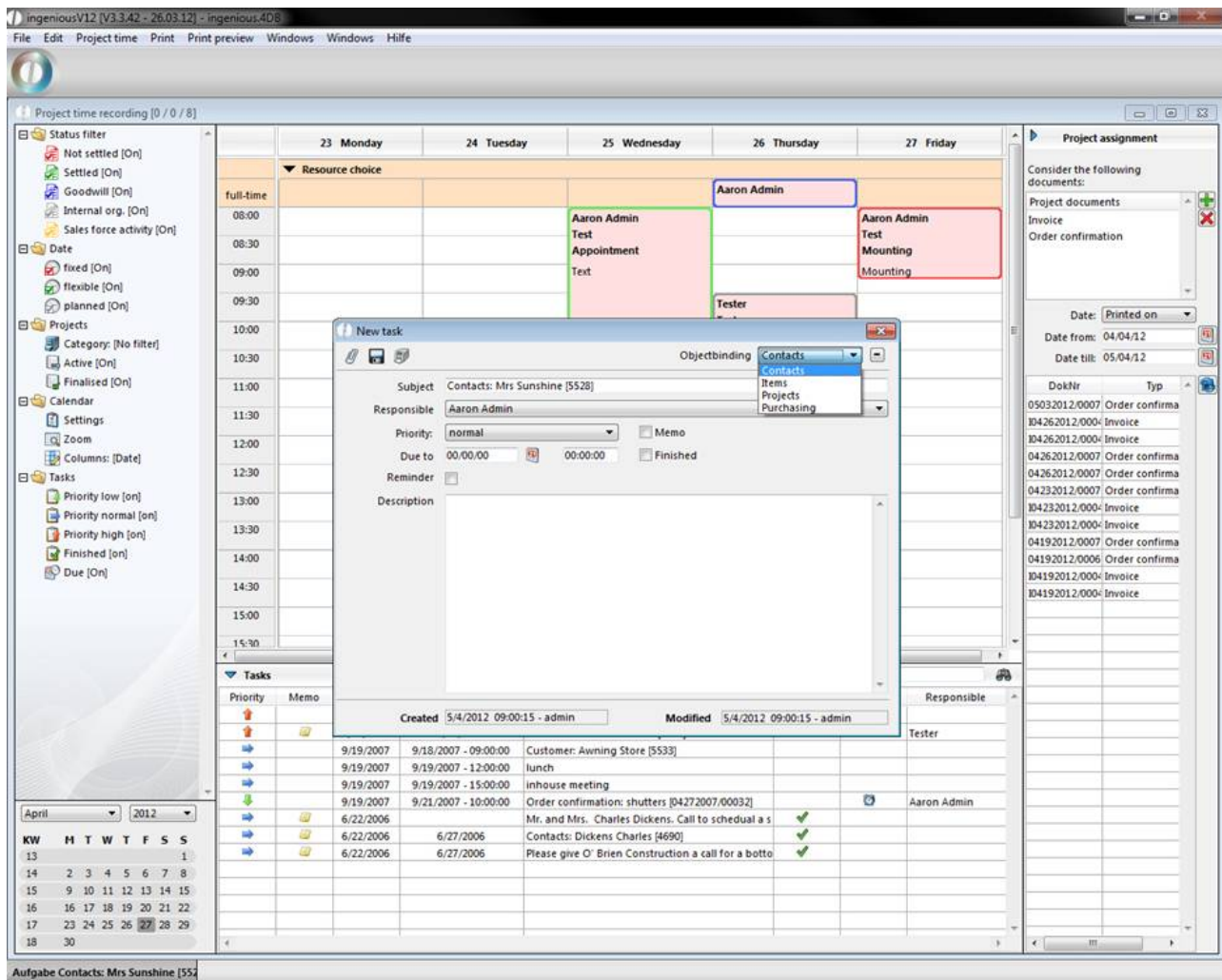
Display/Remove tasks with high priority







Display/Remove completed tasks

Creating a new task

In order to enter a new task, simply click on the 📌 button "Enter new task". The following window then opens.



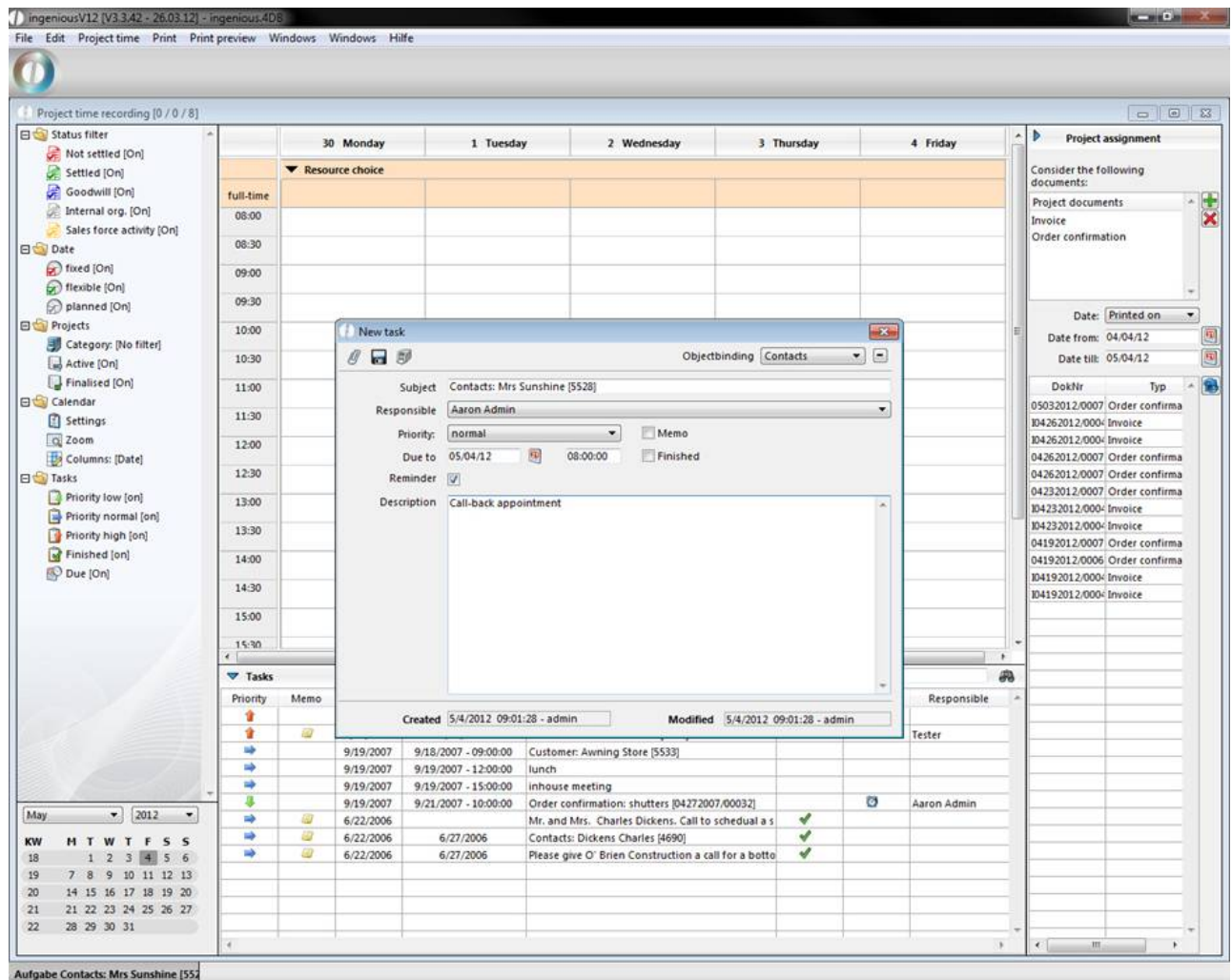
Here you have the possibility to link the task to a specific object such as "Customer". By selecting this object link, the appropriate list view will open and the desired contact can be selected with a mouse click. The contact will then be inserted automatically in the subject heading. In order to delete an object link again, simply click on . With the  button, "Change to attachment", you can always switch to the detail view of the selected object.

In the "Responsible" field, you can select the user to whom the task should be directed. In addition, you can select between three different priority levels: normal, low and high. In the "Due to" area, the date and time when the task should be completed can be specified. The task can be saved with  and printed via .

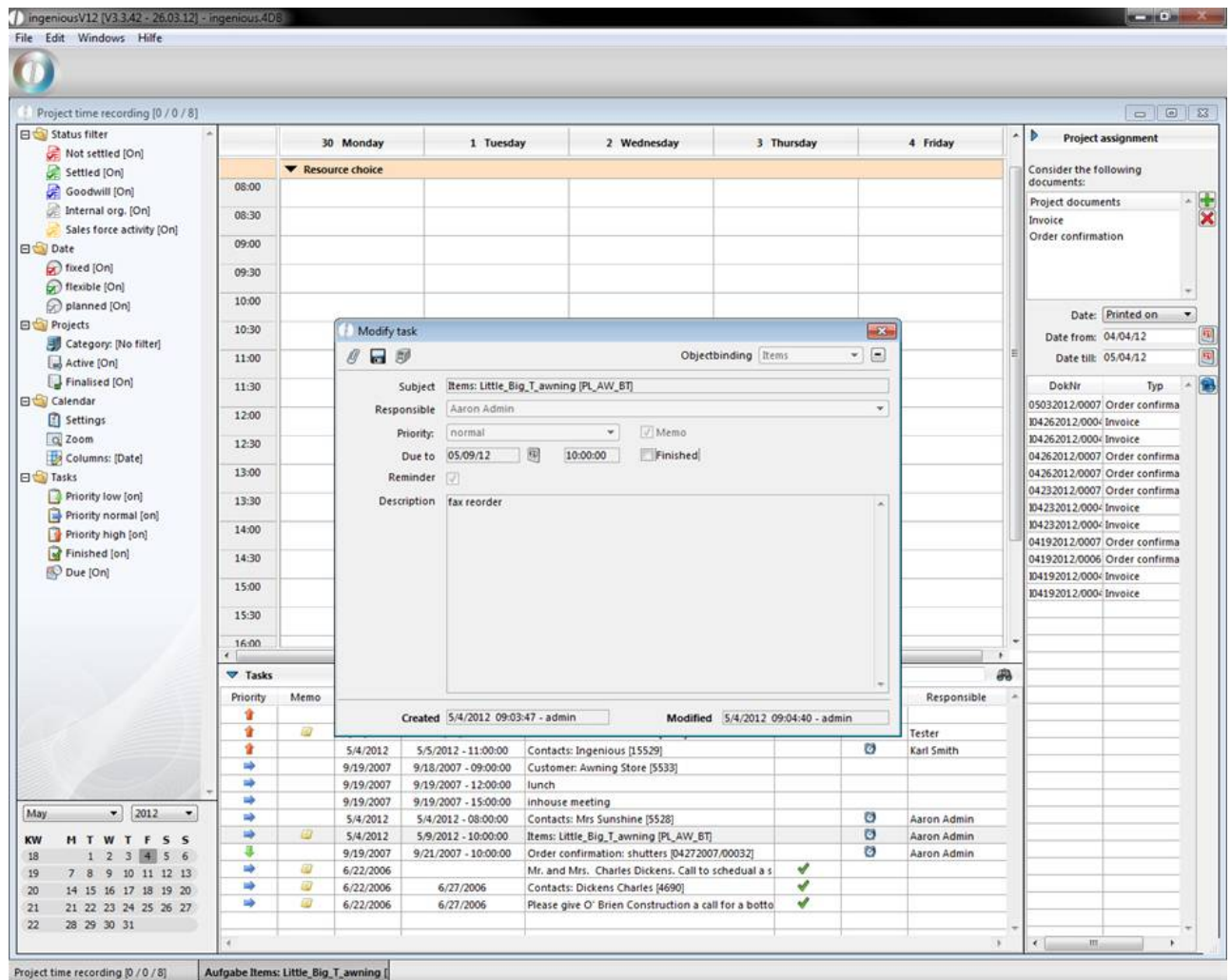
Practice "Creating tasks"

In this exercise you will create three new tasks.

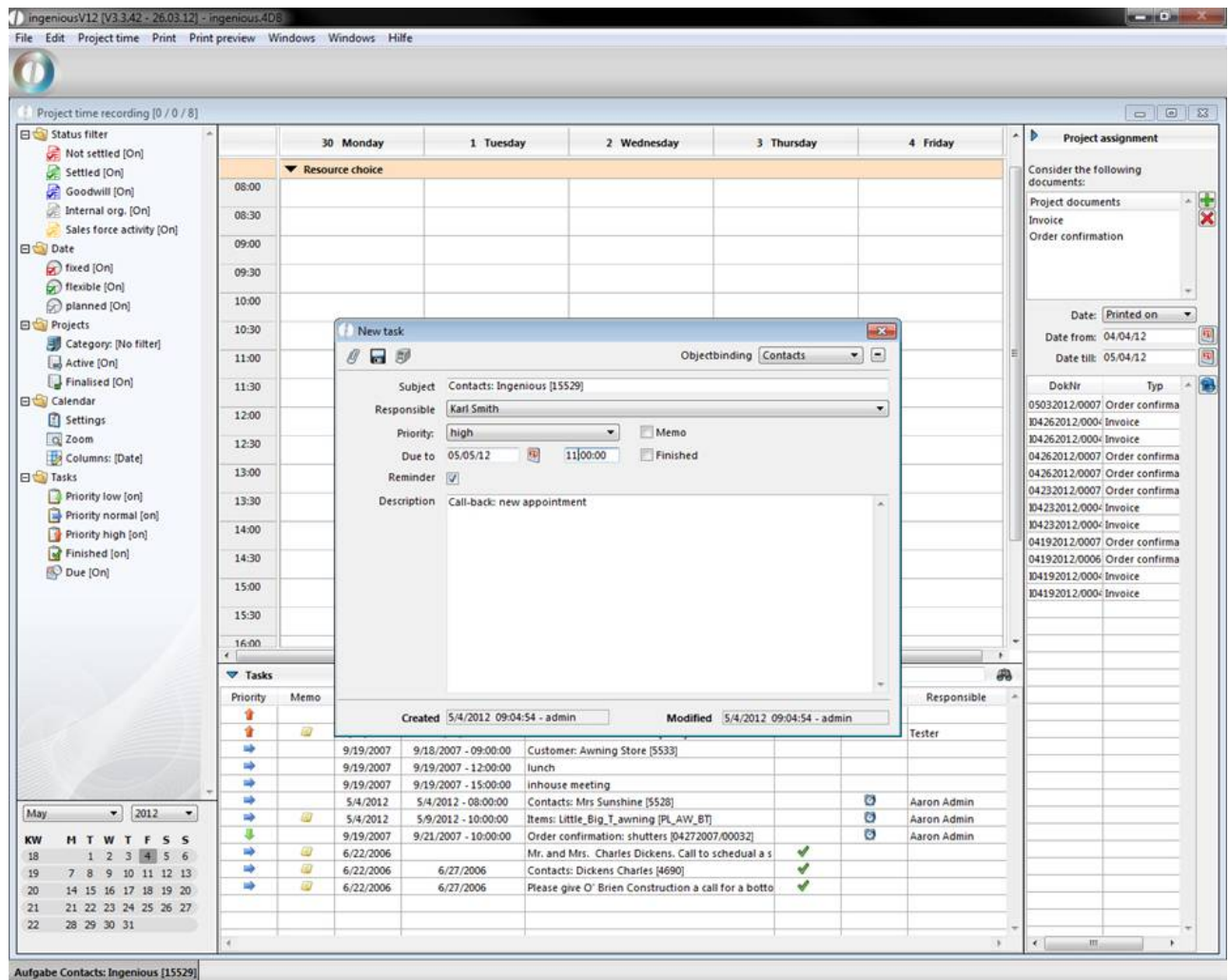
1. Click on the icon "Create a new task". Select the object link "Customer" in the opened window
2. Select a contact, for instance "Mrs Sunshine", in the contact list view by double-clicking.
3. Fill in the following fields as illustrated.



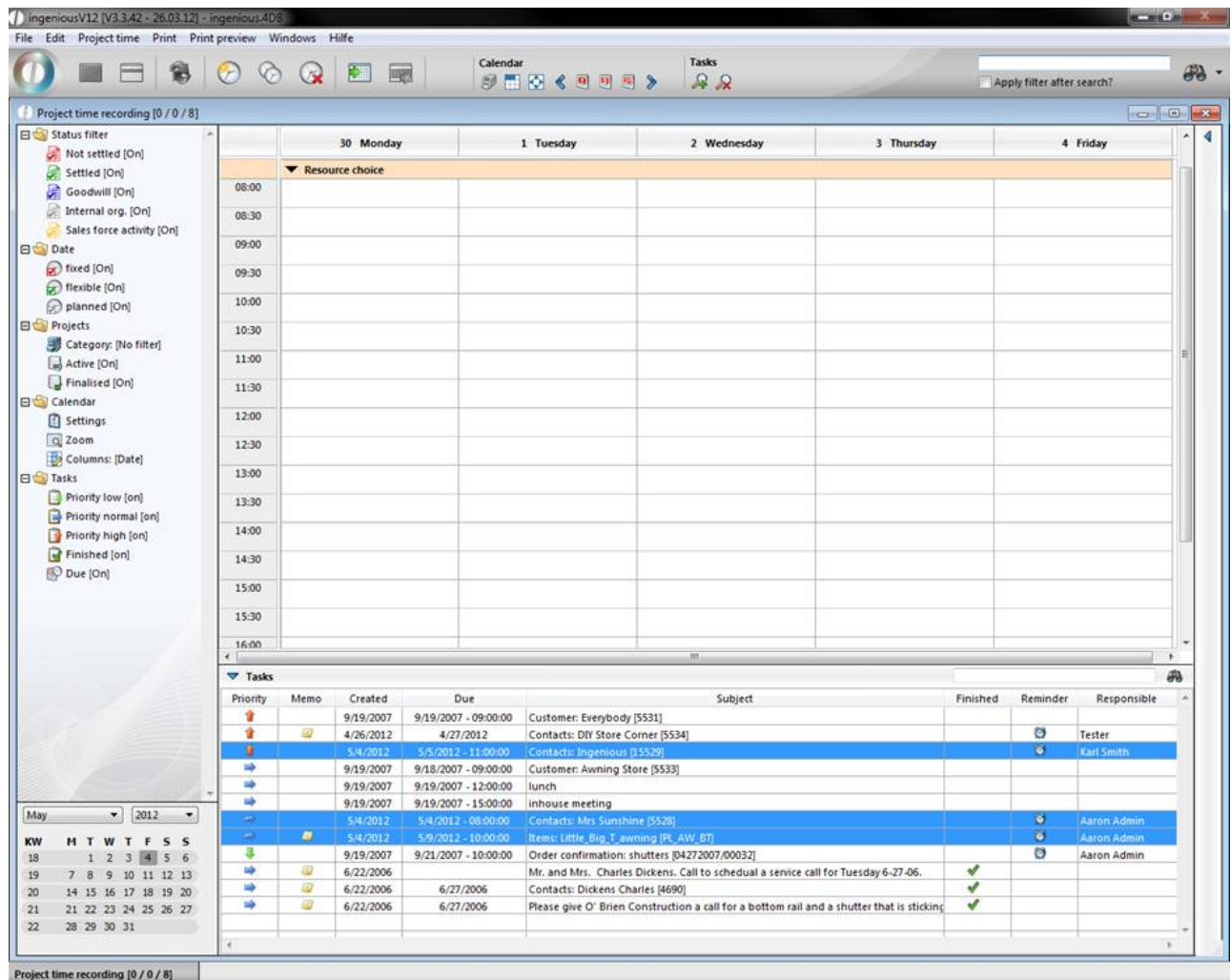
4. Save the task and click on the icon to return to the Task Manager that should contain the new task.
5. Now create a new task. Select option "Items" for objectbinding this time. Choose an article, e.g. "Little Big T awning", in the now appearing article catalogue.



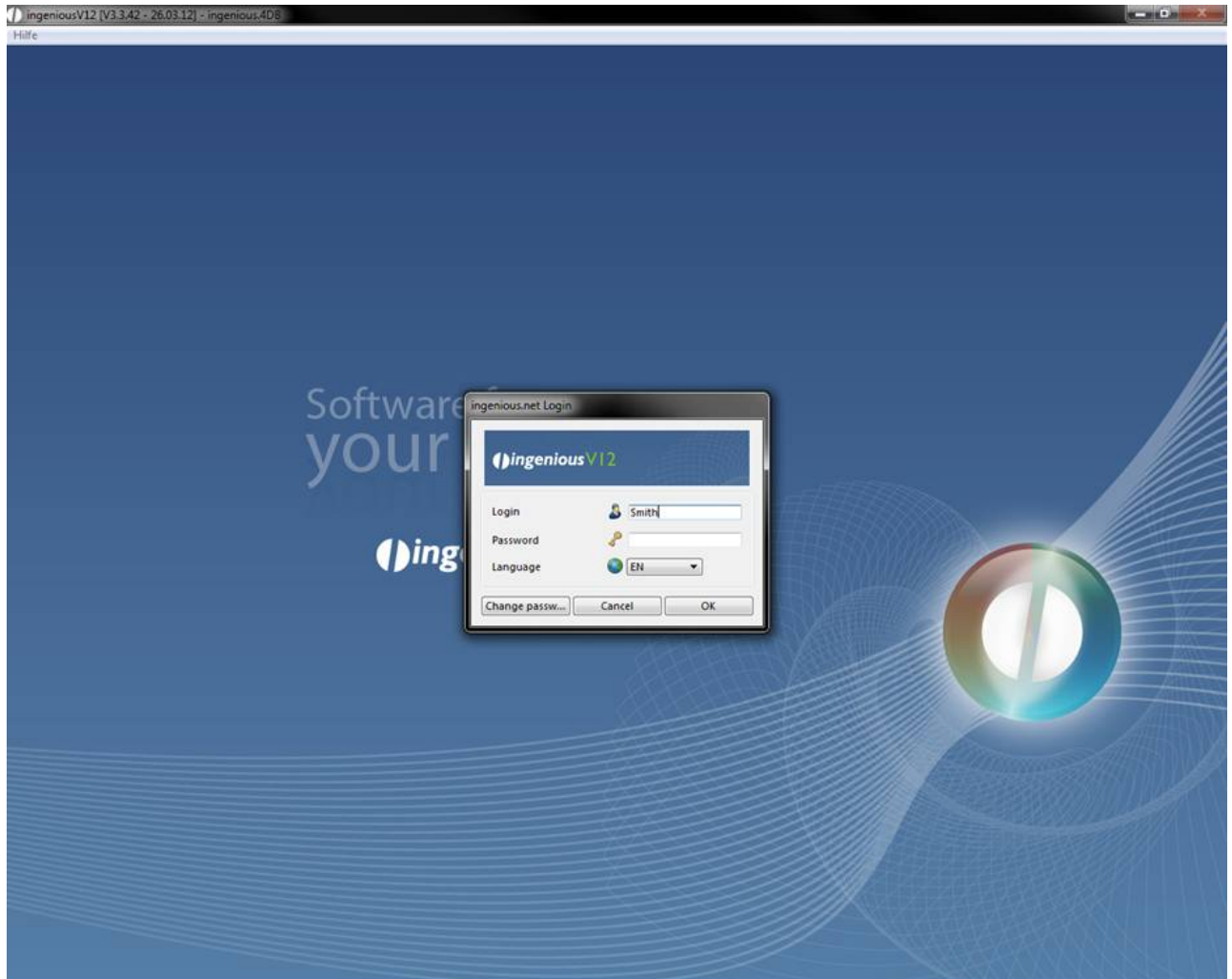
5. The new task will be sent to all employees as a memo, so place a checkmark in the field "Memo" with a single mouse click. Fill in the remaining fields as illustrated and save the task. Return to the Task Manager. Here the task sent as a memo will be marked with this icon.
6. Now the last task will be created. It is important that you select the operator "Karl Smith" in the "Responsible" field. The priority will be labeled as high in this case.



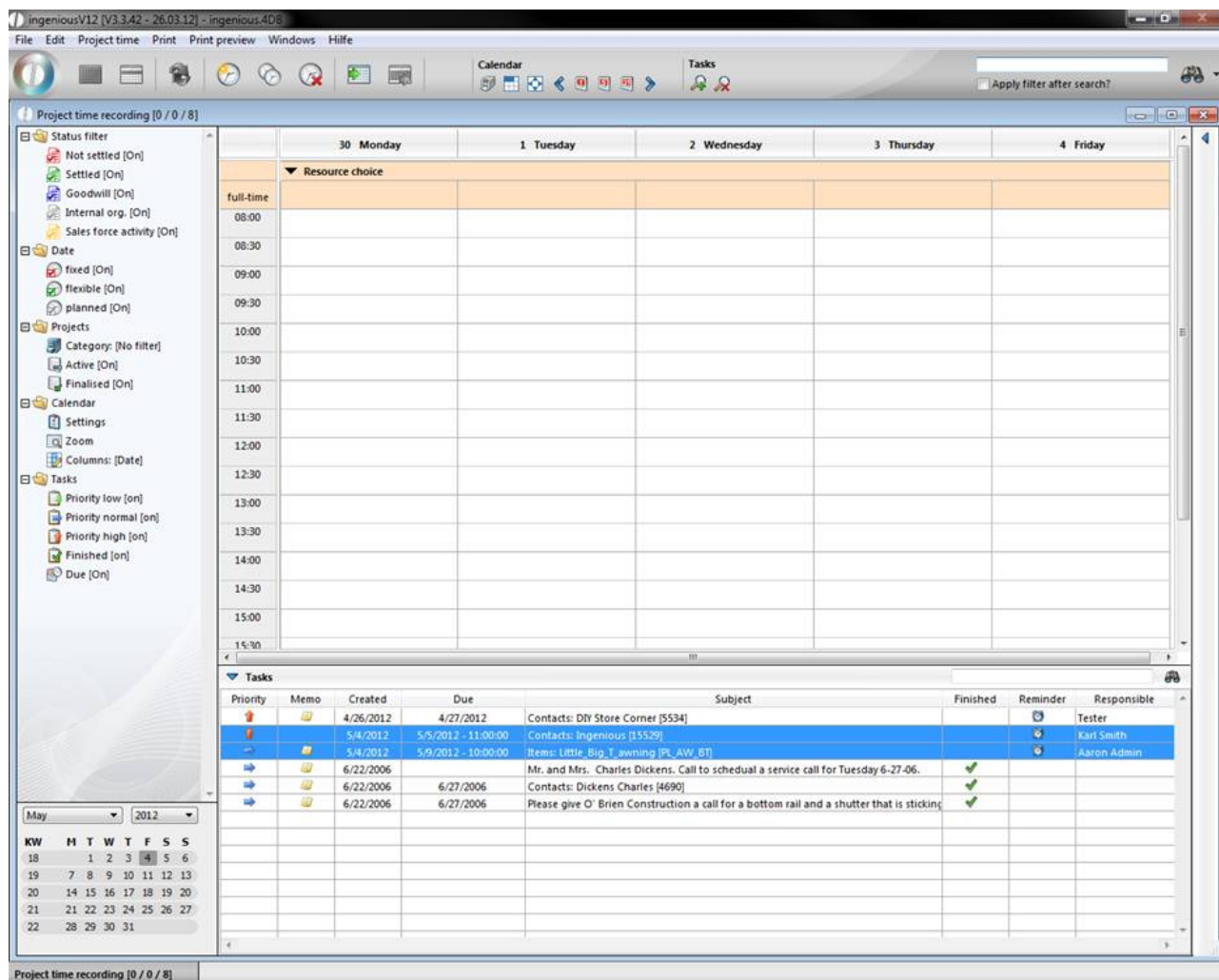
7. Now you see the three attached tasks in your Task Manager.



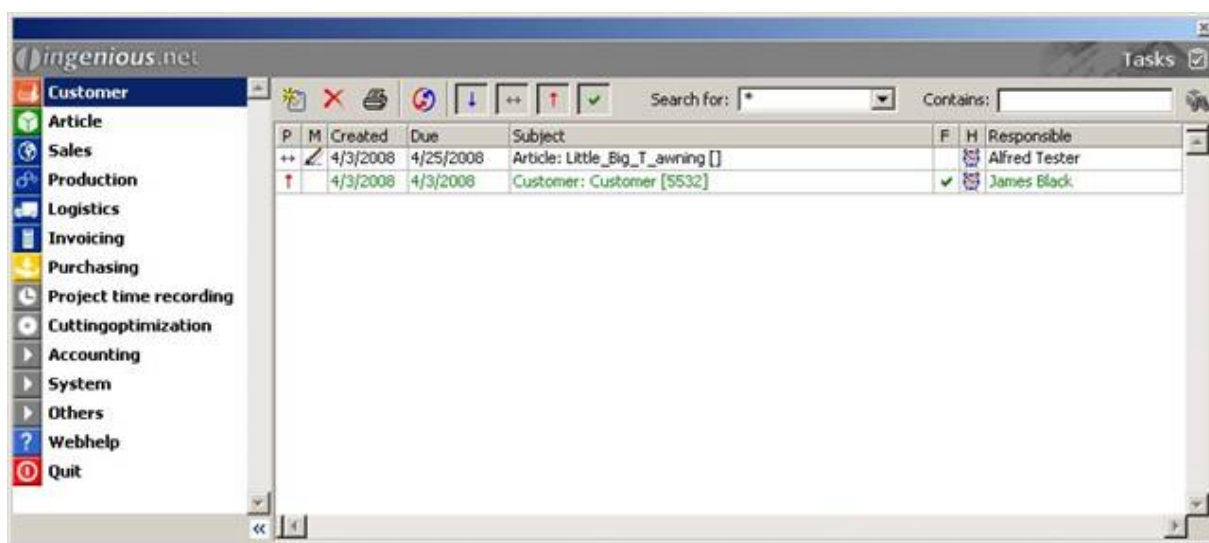
8. Exit the Task Manager. Switch to the user administration and give the user Karl Smith the necessary rights for the use of the Task Manager.
9. Close Ingenious.V12 and login again as Karl Smith (Login: Smith, password stays blank).




10. When you open the Task Manager, you will see two entries: the memo that has been addressed to all employees and the task for which Karl Smith is responsible.



11. To finish the exercise, open the first task and click on the field "Finished". Now the task will be displayed in green in the Task Manager and check marked in the "Finished" column.

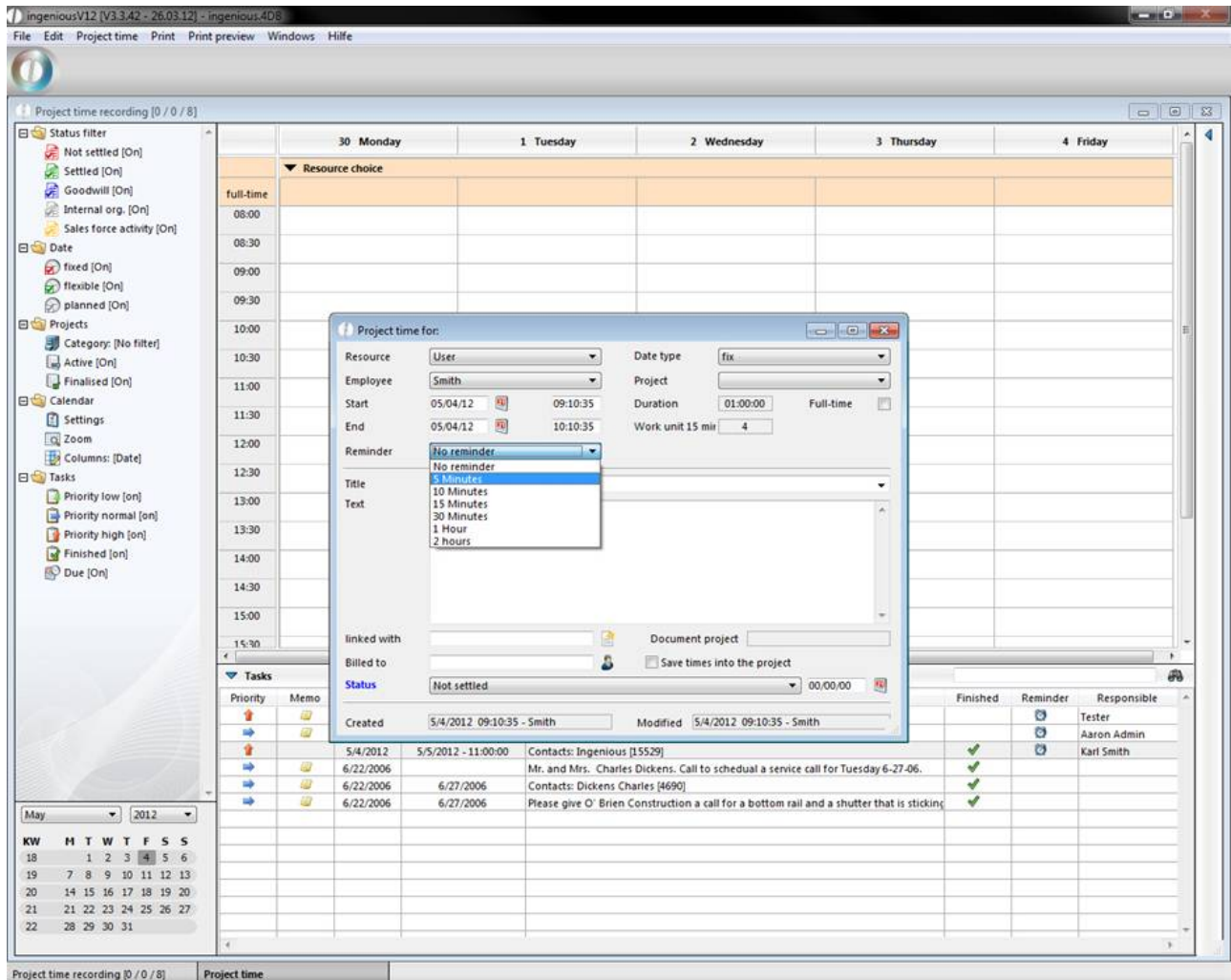


Attach a task directly to the object


The creation of a new task is not only possible with the Task Manager. It is also possible with the  icon in the detail view of the individual contact, article or project.

Instruction notice for task due dates

You have the possibility to retrieve a notice when a task is due with the help of the Task Manager. Here you just need to activate the "Give notice when due". When the respective employee logs in Ingenious.V12 on the due date, the notice report appears immediately.



Print options

There are two print functions in the Task Manager. The first possibility would be the printout via the detail view of the tasks. Here you can print all the information needed for a task via the print icon . In addition you have the possibility to enter further remarks. Direct printing is carried out via the "File" menu item. The second print option concerns the list view of the Task Manager. Here, all completed tasks of the employee can be displayed. You also have the possibility to add changes or upgrades

The screenshot shows the 'Task...' window in the ingenious.V12 software. The window has a menu bar (File, Edit, View, Insert, Style, Tools, Database) and a toolbar. The main area is a form with the following fields:

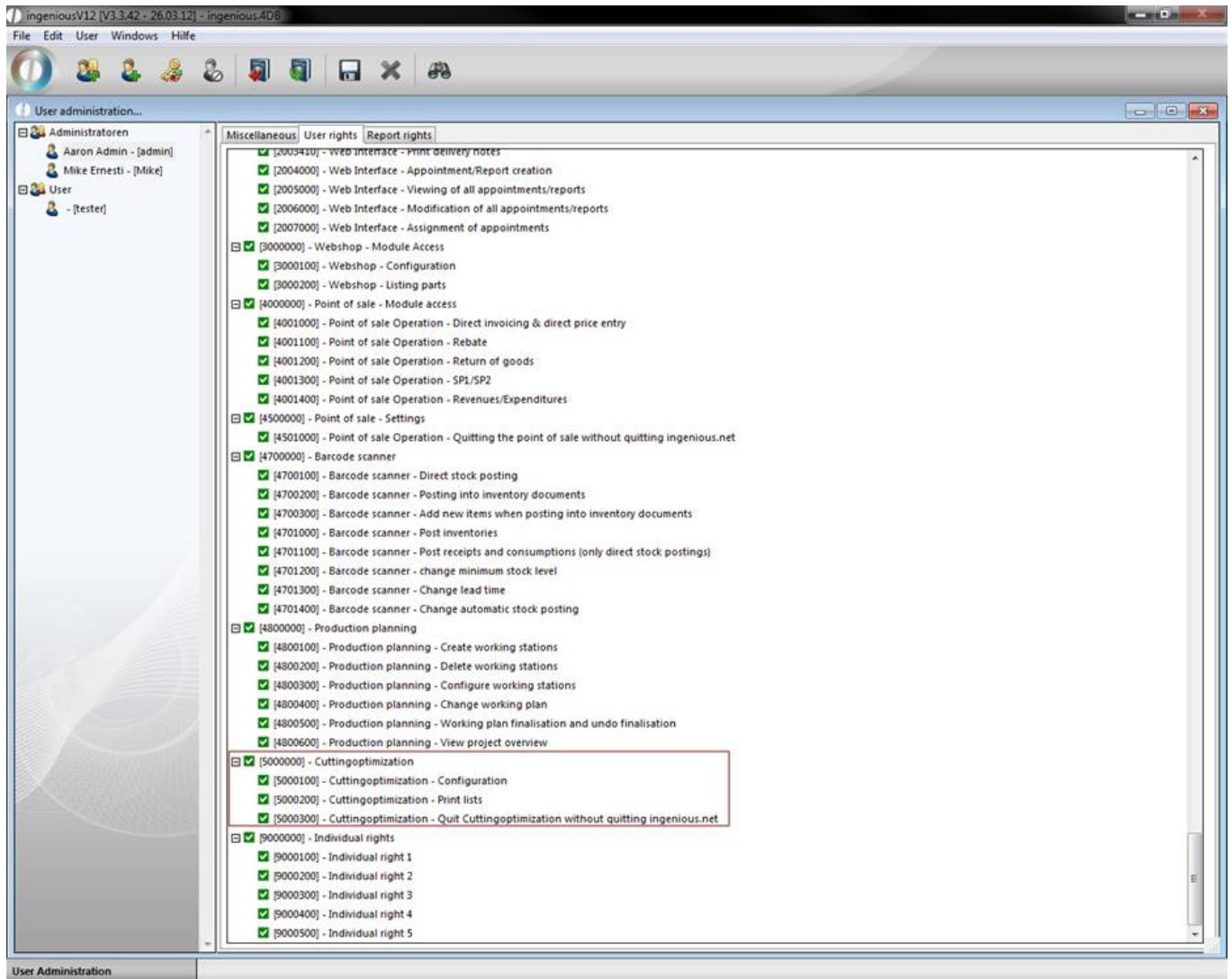
Field	Value
Task	Contacts: Mrs Sunshine [5528]
Responsible:	Aaron Admin
Due:	5/4/2012 - 08:00:00
Priority:	normal
Memo:	No
Finished:	No
Created:	5/4/2012 - 09:01:28 (Aaron Admin)
Modified:	5/4/2012 - 09:03:03 (Aaron Admin)
Printed:	5/4/2012 - 09:11:53 (Aaron Admin)
Description:	Call-back appointment

The status bar at the bottom shows 'Project time recording [0 / 0 / 8]' and 'Aufgabe Contacts: Mrs Sunshine [552]'.

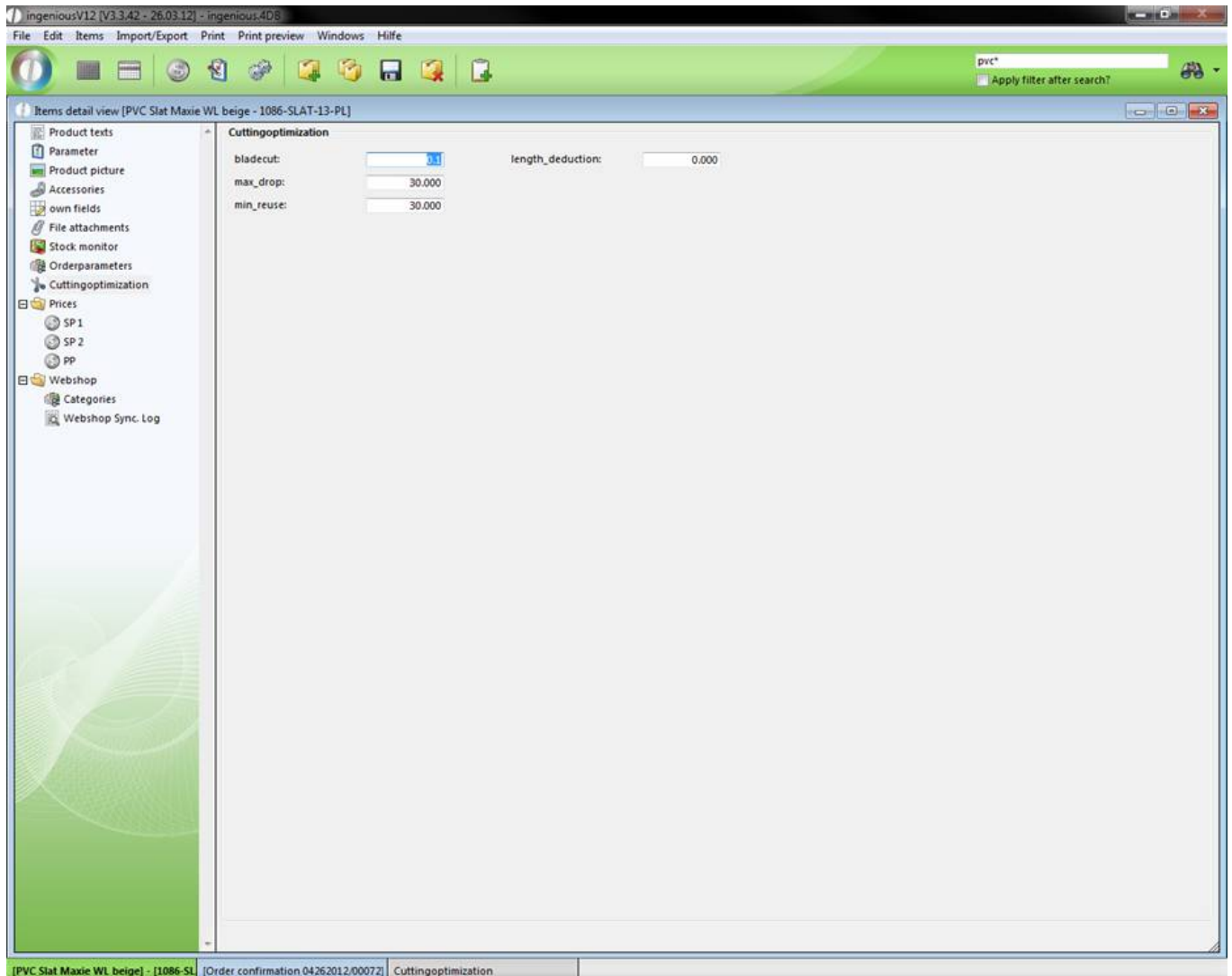
Print view of a task

4.3 Cutting Optimization

Cutting optimization automatically creates a plan for the optimal cut for selected meter articles. To activate the management tool "Cuttingoptimization", the appropriate rights first have to be cleared in the user administration



Other conditions are that the affected meter articles in the detail view "Parameter" have activated the field "Cutting optimization" and the desired settings were updated in the column "Cuttingoptimization".



In the "Bladecut" field, you enter how many centimeters of waste are made when a good is cut (in the example shown, the cut is 0,1 inch). In the "max drop" from which length the material can be discarded is adhered to (i.e. from 30 inch), and lastly you determine from which length the article can be placed in stock or used again (i.e. starting at 32 inch). If the article will be added to a project that is linked to the automatic inventory posting (in this case at the completion of an order confirmation), the project document will be sent for cutting optimization as a result of the article settings. See that you have set the date in the project suitable to your definition at the category cutting optimization of the program settings.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Ingenious] - [Order confirmation 04262012/00072]

Apply filter after search?



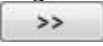

Item	Items	Name	Quantity			Net	SP conv.	Time min.	Com. rate	Com. amount	Project
001	PVC Slat Maxie V Slat: Maxie Pvc Slat Z-55 with Light Slits		5.00	32.000		4,600.00		0.00	0.00	0.00	
002	PVC Slat Maxie V Slat: Maxie Pvc Slat Z-55 with Light Slits		6.00	20.000		3,450.00		0.00	0.00	0.00	

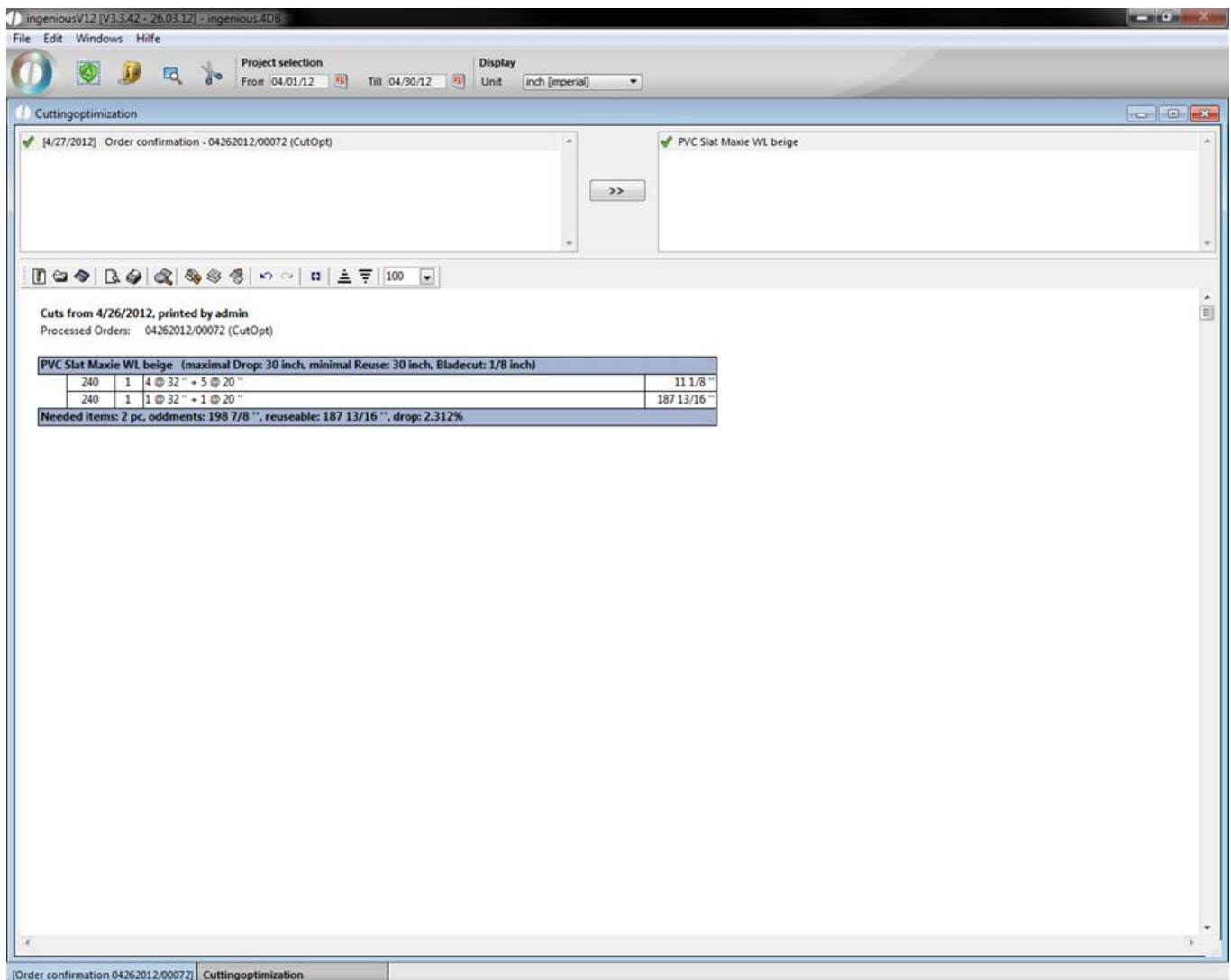
PP [USD] 12.13 Before CM = 7917 USD 65269% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]


Net [USD] 8,050.00 After CM = 7917 USD 65269% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 8,050.00

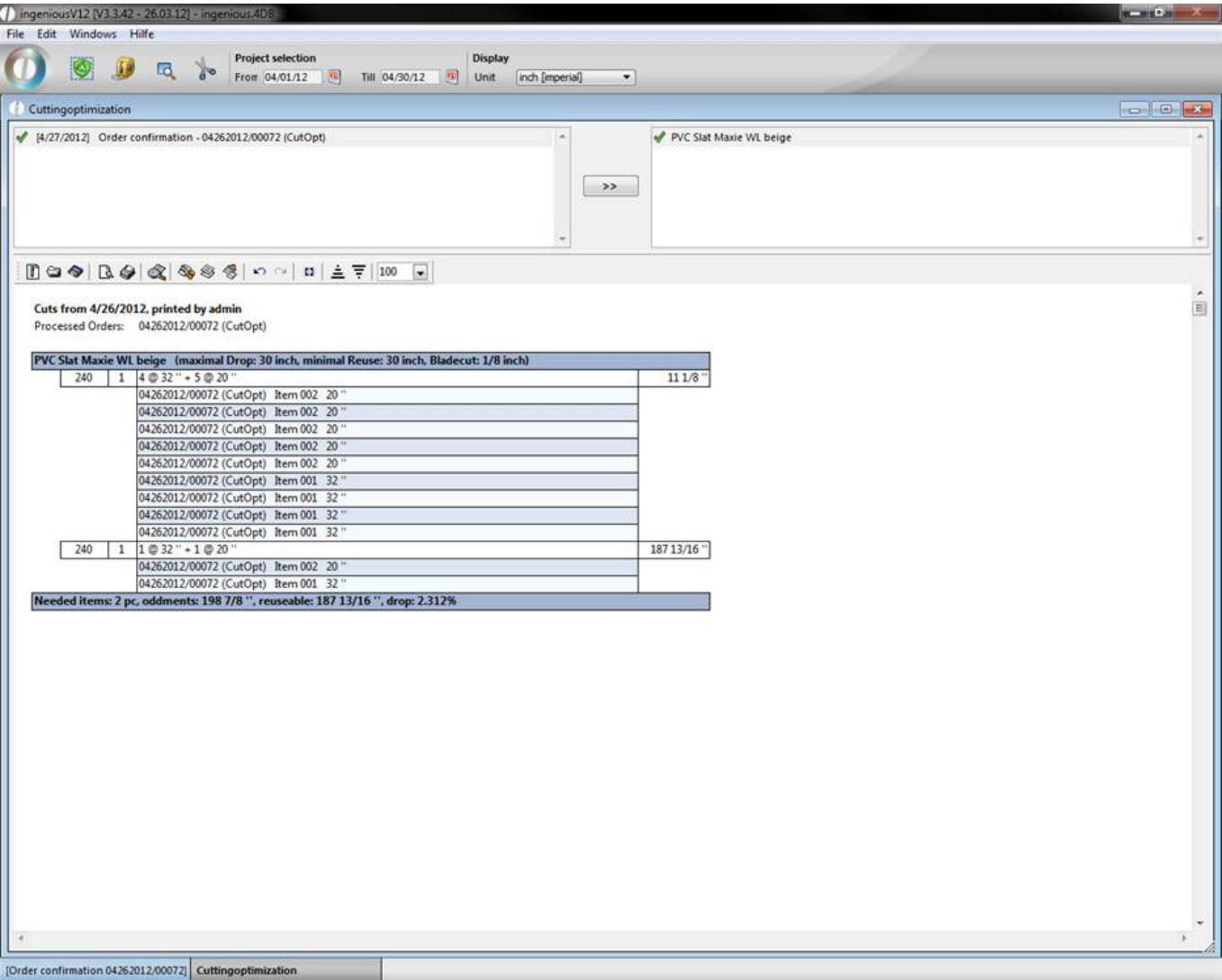
Footer text


[Order confirmation 04262012/00072] Cuttingoptimization

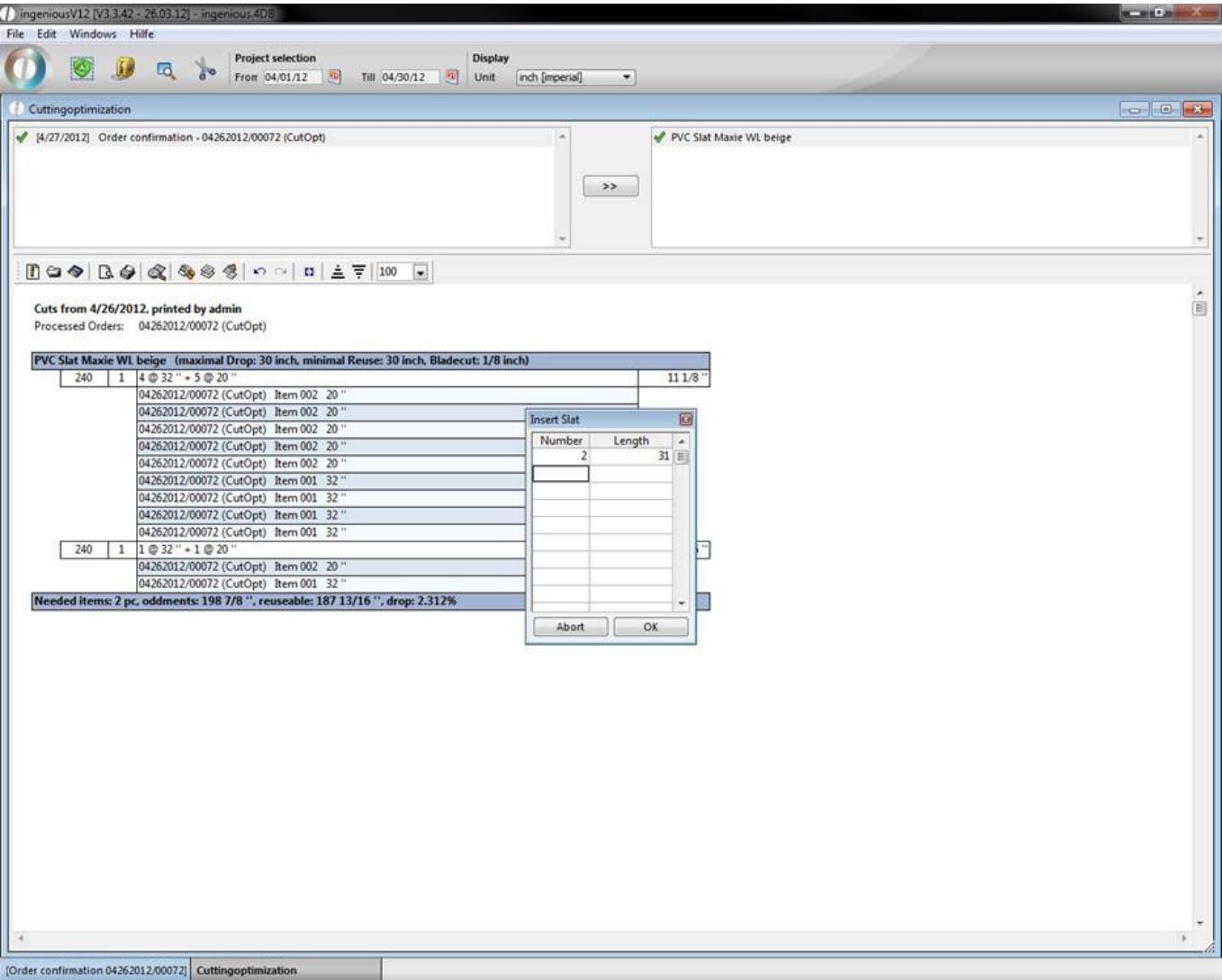
When you now open the administrative tool and indicate the time frame, the corresponding order confirmation will be listed. By clicking on an order confirmation, the display changes from  to . With the  button, you will see a list of all articles with a cut in the right portion of the window. When you click on the  button "Calculate optimized cut for the selected article", the optimized cut calculation will be displayed.




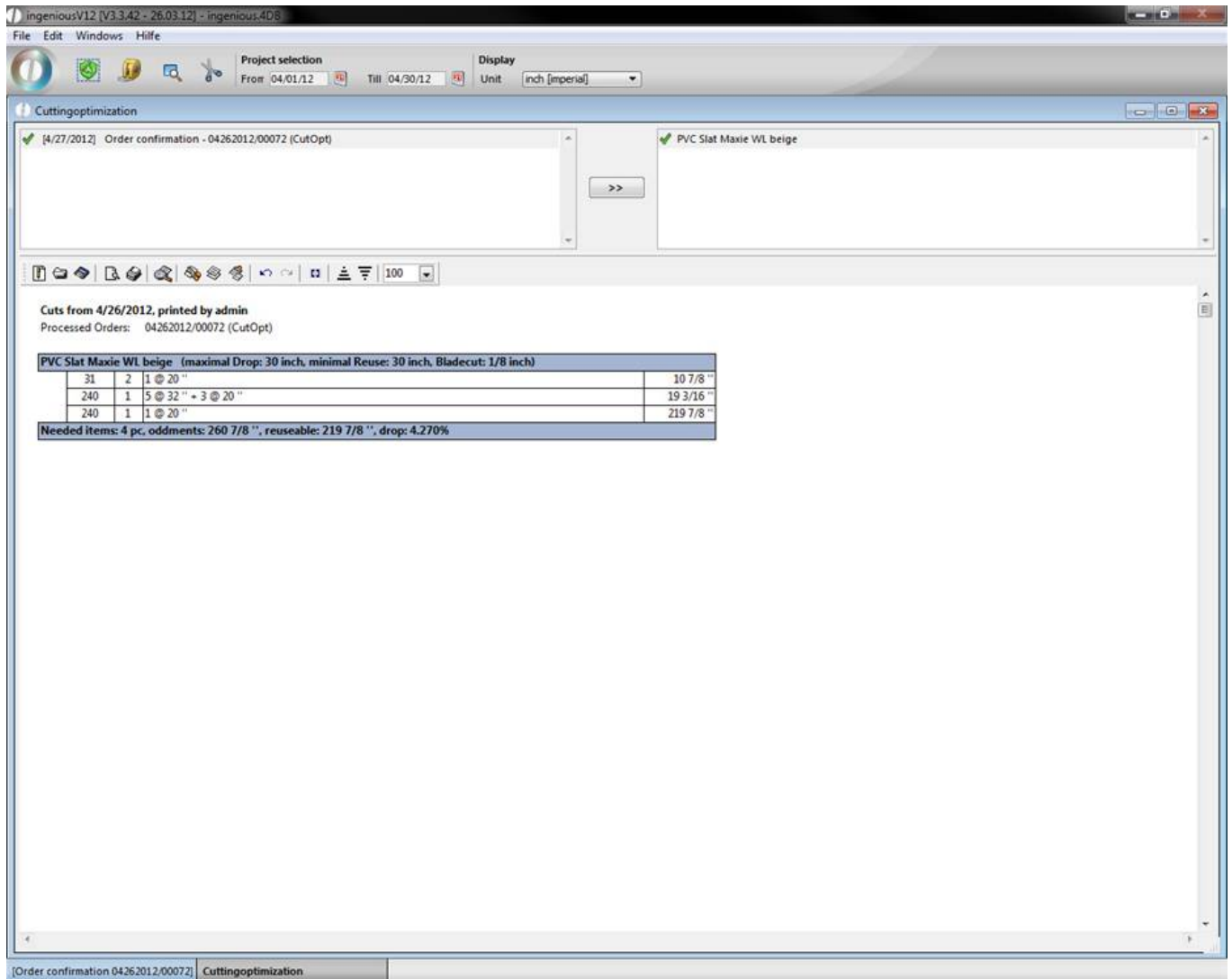
In the header you find the print date, the name of the one who printed the project and a list of the regarded projects. In the footer the needed item count, remaining length, the useable length and the drop in percent are shown. With the help of the button  you can view detail information for the items.




If you still have, for instance, remaining stock that should also be used, click on the  button and enter the amount and the size in the window that appears.



If you now click again on  "Select optimized cut for selected article" the cut is calculated taking the waste into consideration.

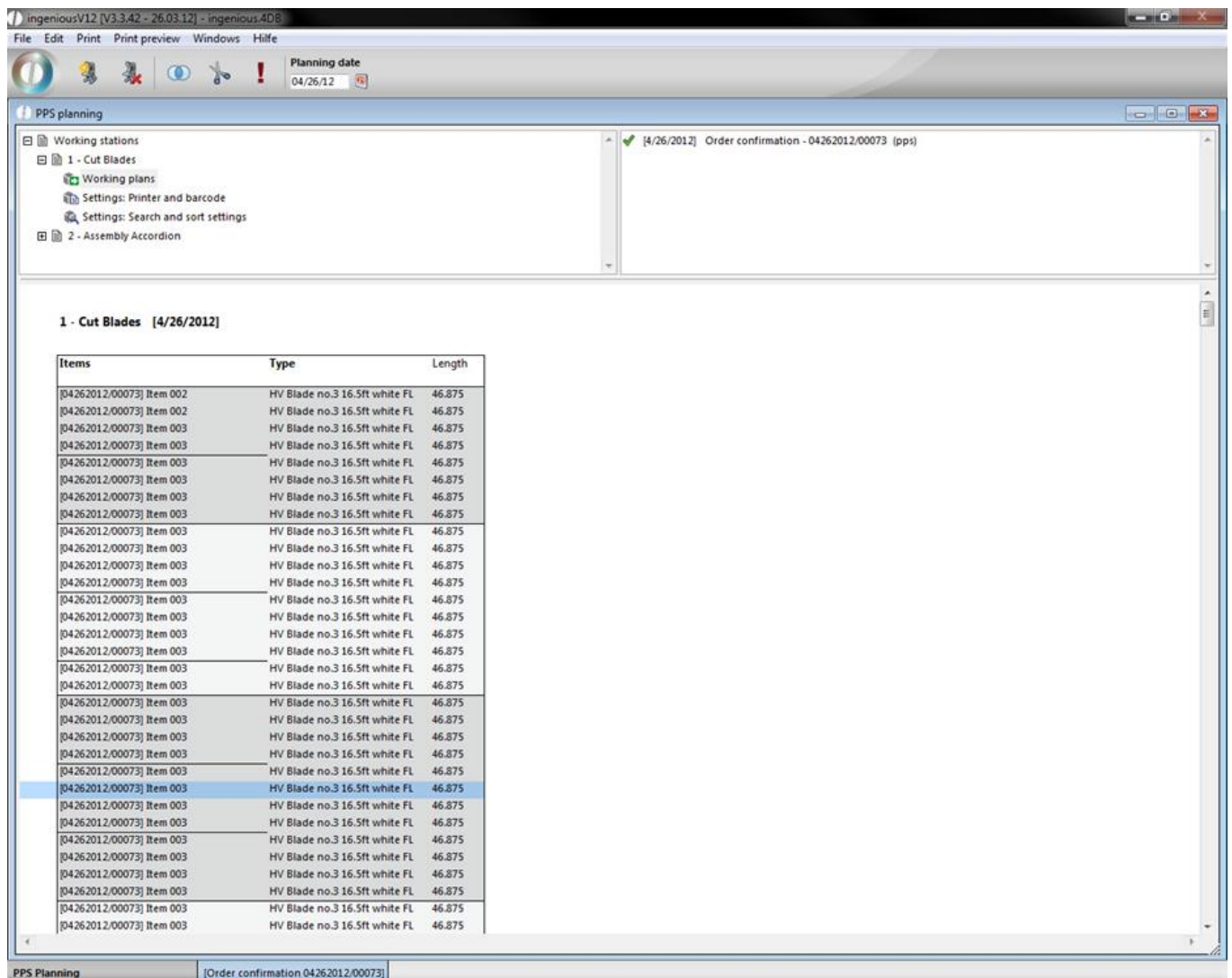


When the cut has been determined and the articles have been cut, you can close the cuts with . At the next cutting optimization, no cuts will be calculated for the corresponding article.

In the future it will be possible to create the cut with a touch screen. You will find the appropriate settings in the program settings. At this time this option is in the developing stage.

4.4 Production planning

In this module it's possible to plan several workflows from one or more production orders. The manufacturing schedule can be transmitted gradually or complete to the assigned output device (scanner, browser, label printer) of the working station. After processing of every working step a response is sent to the planning module, so that the current working state of the order can be viewed in ingenious.V12.



The module consists of 3 main parts. In the left upper corner you find a list of all working station and the configuration possibilities. The list in the right upper corner shows all projects containing incomplete working steps (pps items) for the selected work station at the adjusted planning date. In the bottom area a listing of the pps positions is displayed.

Icon bar



Create new work station



Delete work station



Group selected pps items



Sort per cutting optimization



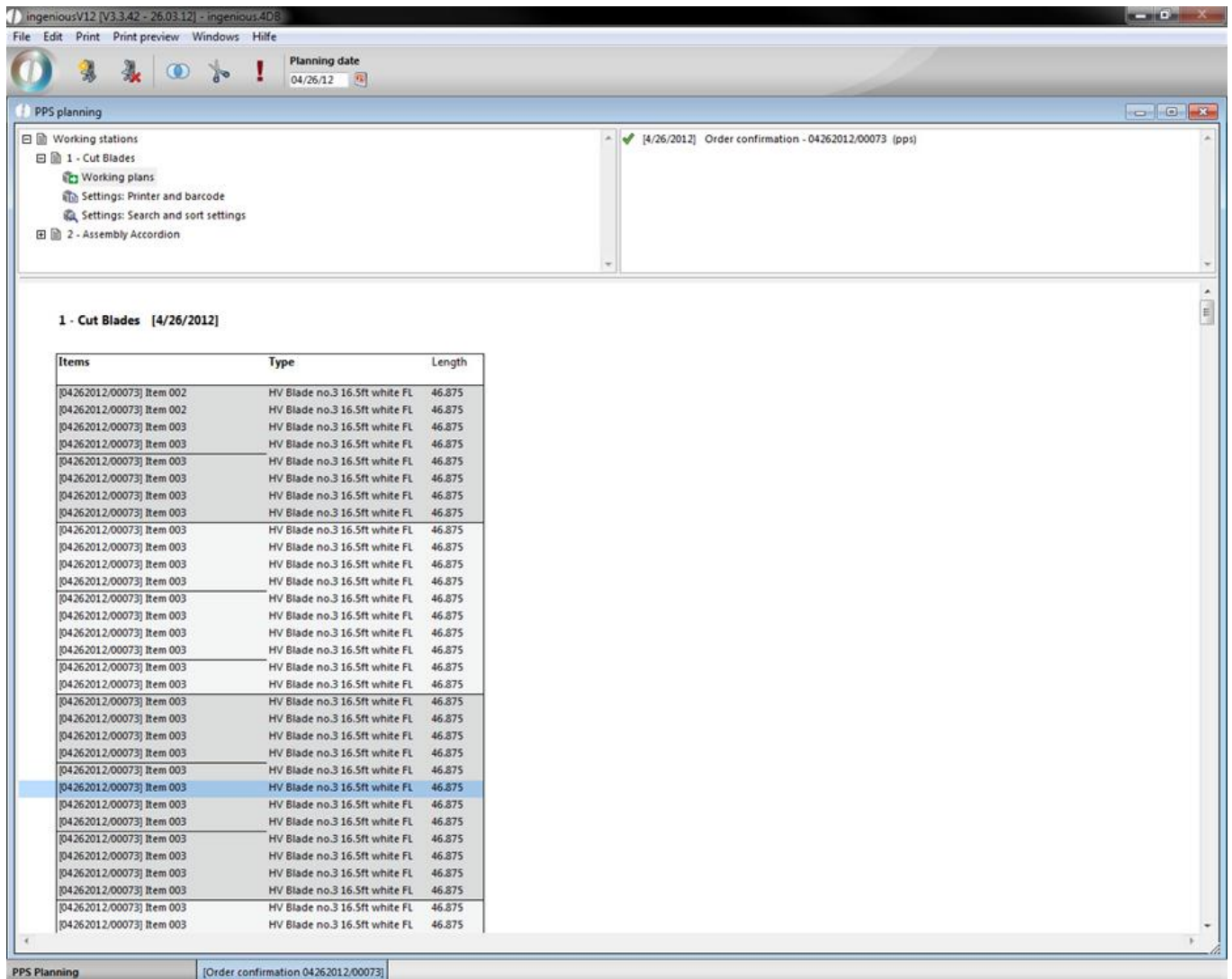
Toggle finish/release current plan

Working station list

1. Working plans:

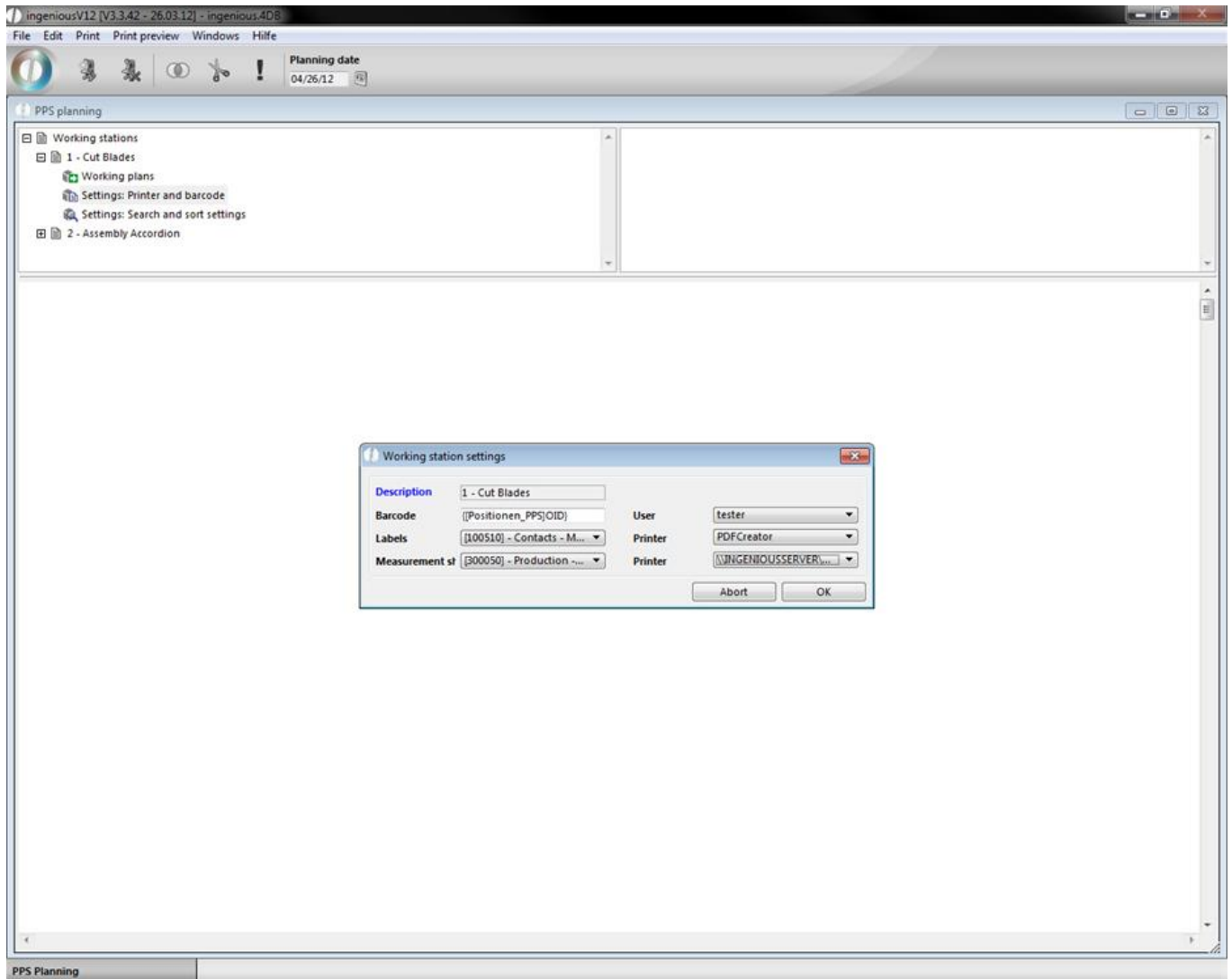
For the adjusted day the daily plan, all pps items and assigned projects will be loaded. If a daily plan is loaded for the

first time, the pps items will be sorted corresponding to the settings (see 3.).



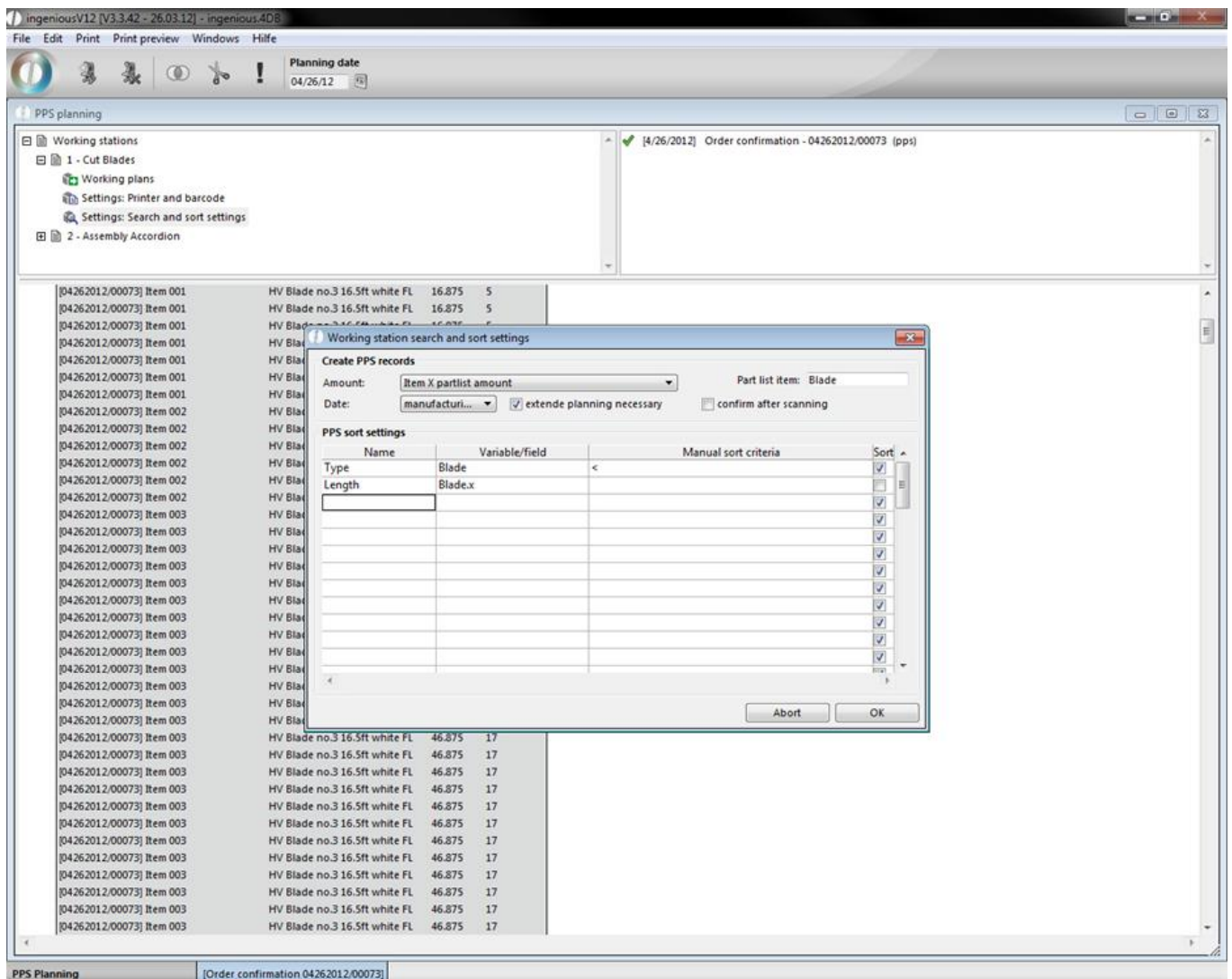
2. Settings: Printer and barcode:

A configuration window will open up, where you can adjust the barcode, user and print reports. Thereby you only have to define the values that will be used later. When you want to use a scanner you have to enter a value in the field "barcode". The barcode consists of free texts and place holders {...}. The place holders can be ingenious.V12 project-, item placeholder or field names. If you want to print labels on completing a pps item, a label printer has to be chosen. If you want to print measurement sheets with the help of a button on a web site, the area "measurement sheet" has to be filled.



3. Settings: Search and sort settings:

By double clicking this entry, the configuration window will be shown, where you can define the count of the created pps items and the columns for the automatic sorting. PPS items can be created per project, per item, per part list item or per part list item X item quantity. For the sort orientation you have to enter the identifier and the part list variable name or the project field. It is necessary to manually adjust the sort orientation for a few parameters. Possible declarations are "<" for descending or ">" for ascending sorting. When you don't want to use a column for sorting, uncheck the checkbox in the sort column. The execution time of the pps item is defined in the field "date". When in a project this date is defined and the project is marked as reserved or stock posted, the pps items will be created on saving of the project. If you undo these adjustments the pps items will be deleted (except they were already processed). The following two check boxes "extend planning necessary" and "confirm after scanning" are important for special pps solutions. If these two boxes both are unchecked, then the pps items are designated for the regular scanner mode. The order of work steps is given by the scan order and by scanning an item it will be marked as completed. If "confirm after scanning" is checked, then the pps items will be temporary marked when they are scanned and can be undone or accepted after a further integrity check. When "extend planning necessary" is checked, the planning will happen according to the order in the pps list (see following part) and the pps information can then be send successive to the label printer without scanning them, for instance by clicking a button on a website.




Project list

The project list lists all projects containing pps items for the chosen day. By double clicking a project the pps items of this project can be deactivated und reactivated. Deactivated pps items cannot be scanned or planned and are not shown in the pps item list. You can deactivate a project only, if no pps item from this project was handled.

PPS item list


The pps item list shows a listing of all pps items for the selected work station and date. The columns arise out of the configurations in the part "Settings: Search and sort settings" of the work station. The first column is always the project or item number. The color of the item marks the state of the item. Green pps item are already handled, black are not.

When "confirm after scanning" is checked, the pps items will get orange after scanning, that means that they are

temporary planned. By clicking a button in a web browser or the  button the pps item will be completed and colored green (handled). If the scanning is undone the pps item will colored in black again (unhandled).

When "extend planning necessary" is checked the pps item list additionally can be grouped and sorted. The first initial group is done automatically with the column configurations. Thereby similar or equal pps items can be summarized. The groups are represented by different background colors and borders. After defining the groups it is possible to

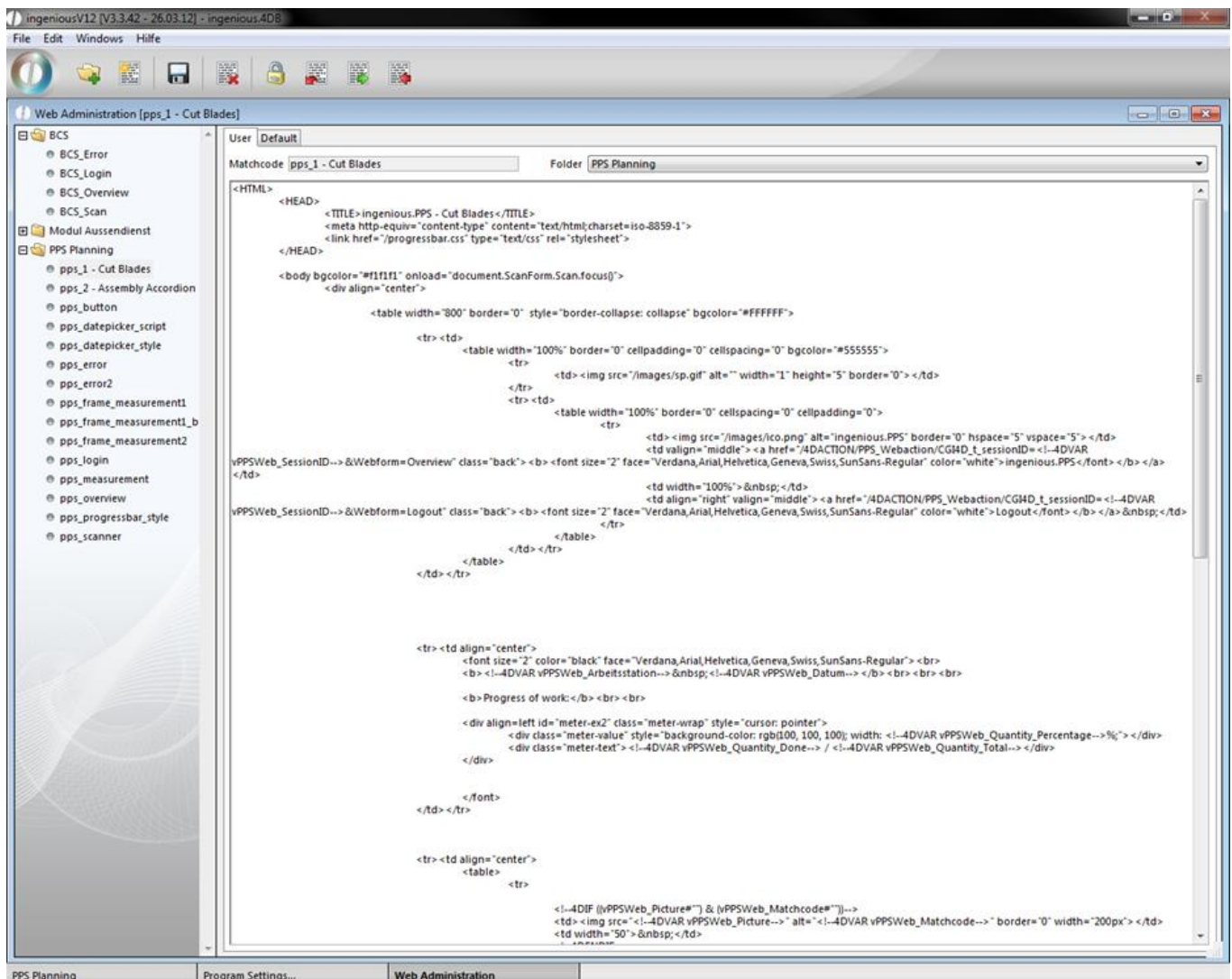
resort the pps items in a group with the help of the cutting optimization. The cutting optimization  is only

possible with length items. If the planning of the order is ready, the plan has to be completed by clicking . Thereby the pps items in the list view will be colored grey and are released for production.

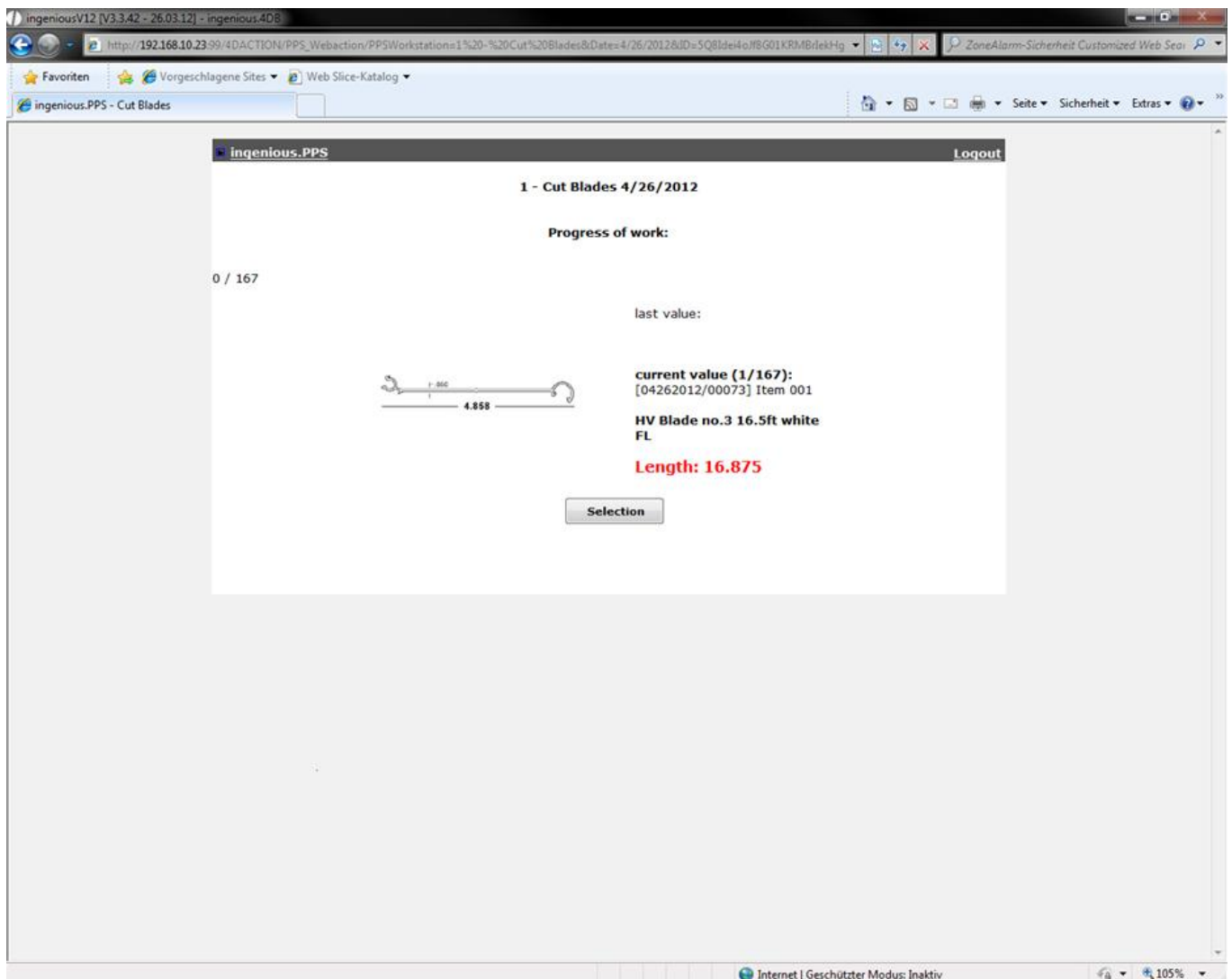
You can undo the completion and regroup and resort the items. This is only possible in groups that are completely unhandled. If one or more pps items of a group are handled, the group cannot be resorted and regrouped and has to be handled completely.

Processing the pps items in the web browser

To process pps items in the web browser, special html templates have to be lodged in the ingenious.v12 web administration. You can start the web administration by clicking the button "web administration" in the program settings in the category "web server". There you can add several default templates (for printing, scanning, or error output) and individual templates per working station.



Depending on requirements different information can be displayed and/or edited.

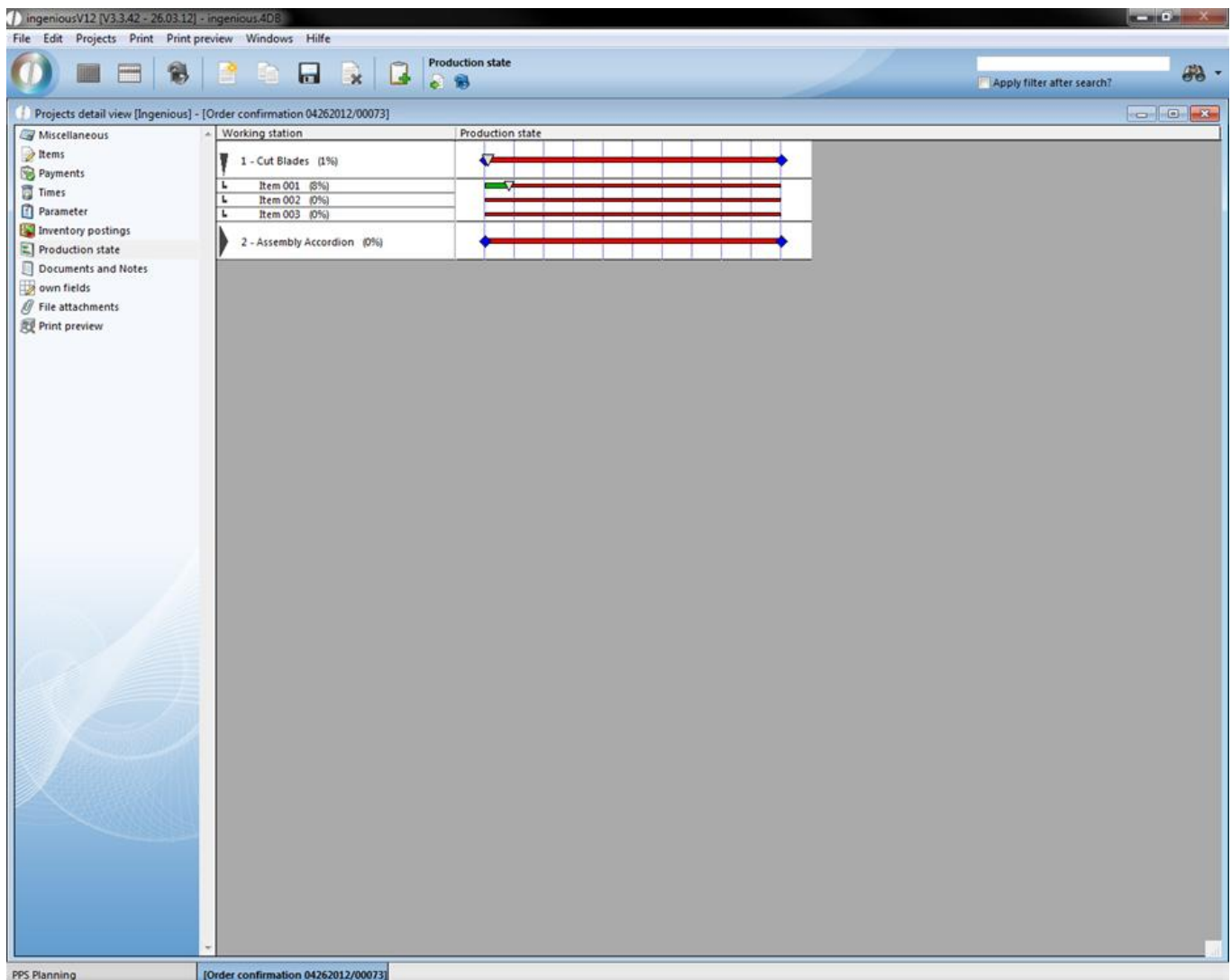


The screenshot shows a web browser window with the URL `http://192.168.10.23:99/4DACTION/PPS_Webaction/PPSWorkstation=2%20-%20Assembly%20Accordion&Date=4/27/2012&JD=6V20X3mUAKC64A`. The browser's address bar also shows `ZoneAlarm-Sicherheit Customized Web Search`. The page title is `ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408`. The browser's toolbar includes `Favoriten`, `Vorgeschlagene Sites`, and `Web Slice-Katalog`. The page content is titled `ingenious.PPS` and `Logout`. The main heading is `2 - Assembly Accordion 4/27/2012`. The table has the following columns: `Item`, `Blade type`, `Lock type`, `Width`, `Height`, and a `Selection` button. The table contains 15 rows of data, all with `HV Blade no.3` as the blade type and `Egress` as the lock type. The width and height values vary across the rows. The bottom of the page shows the status bar with `Internet | Geschützter Modus: Inaktiv` and a zoom level of `105%`.

Item	Blade type	Lock type	Width	Height	Selection
[04262012/00073] Item 001	HV Blade no.3	Egress	23	20	
[04262012/00073] Item 001	HV Blade no.3	Egress	23	20	
[04262012/00073] Item 001	HV Blade no.3	Egress	23	20	
[04262012/00073] Item 001	HV Blade no.3	Egress	23	20	
[04262012/00073] Item 001	HV Blade no.3	Egress	23	20	
[04262012/00073] Item 002	HV Blade no.3	Egress	13	50	
[04262012/00073] Item 002	HV Blade no.3	Egress	13	50	
[04262012/00073] Item 002	HV Blade no.3	Egress	13	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 003	HV Blade no.3	Egress	62	50	
[04262012/00073] Item 001					

View pps items in projects

In projects with pps items the production state can be viewed in the category "Production stat". The pps items can be grouped by working station or items and can be refreshed.



Print report in the pps module

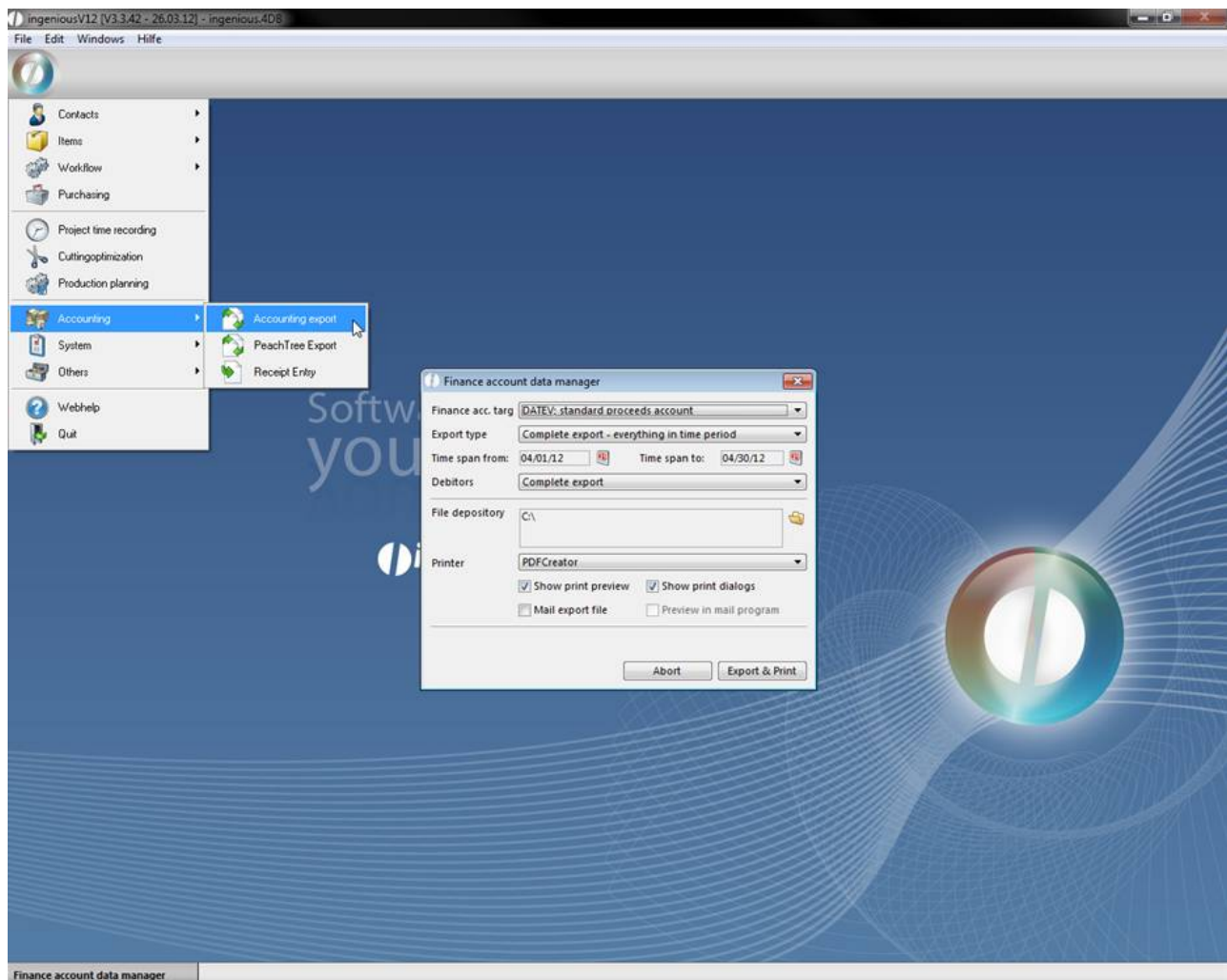
There is a default report for the pps item list. Additionally you can create custom print reports in the program settings. Useful report types are part list labels (type 4), consignment labels (type 5) and hmReports (type 16). The printouts direct at the selected pps items.

5 Accounting

5.1 Finance account data manager

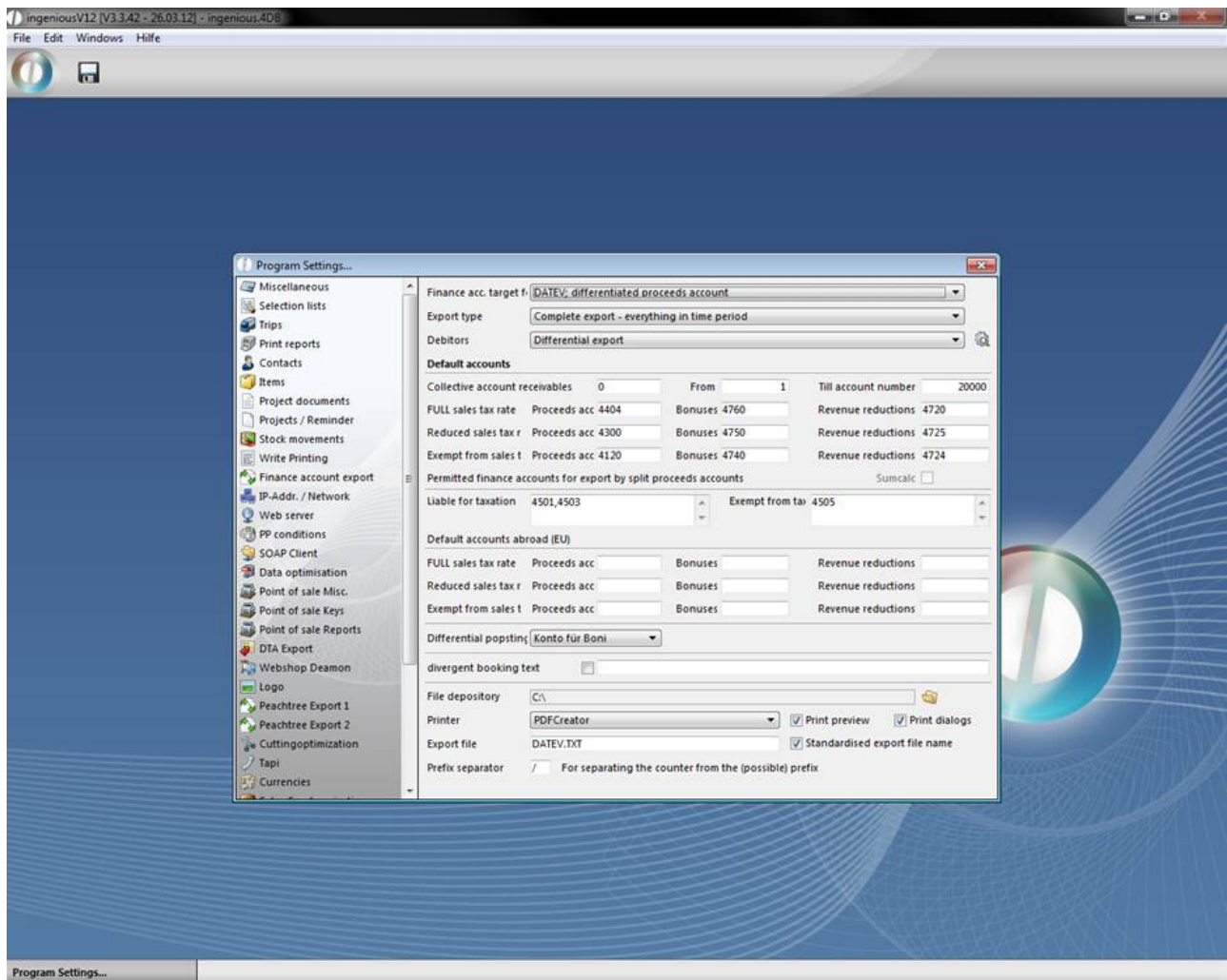
Germany only

With the Finance account data manager, you can export finance data, i.e. according to DATEV standards and import payments (prima notes). Other target formats are possible for exports upon request.



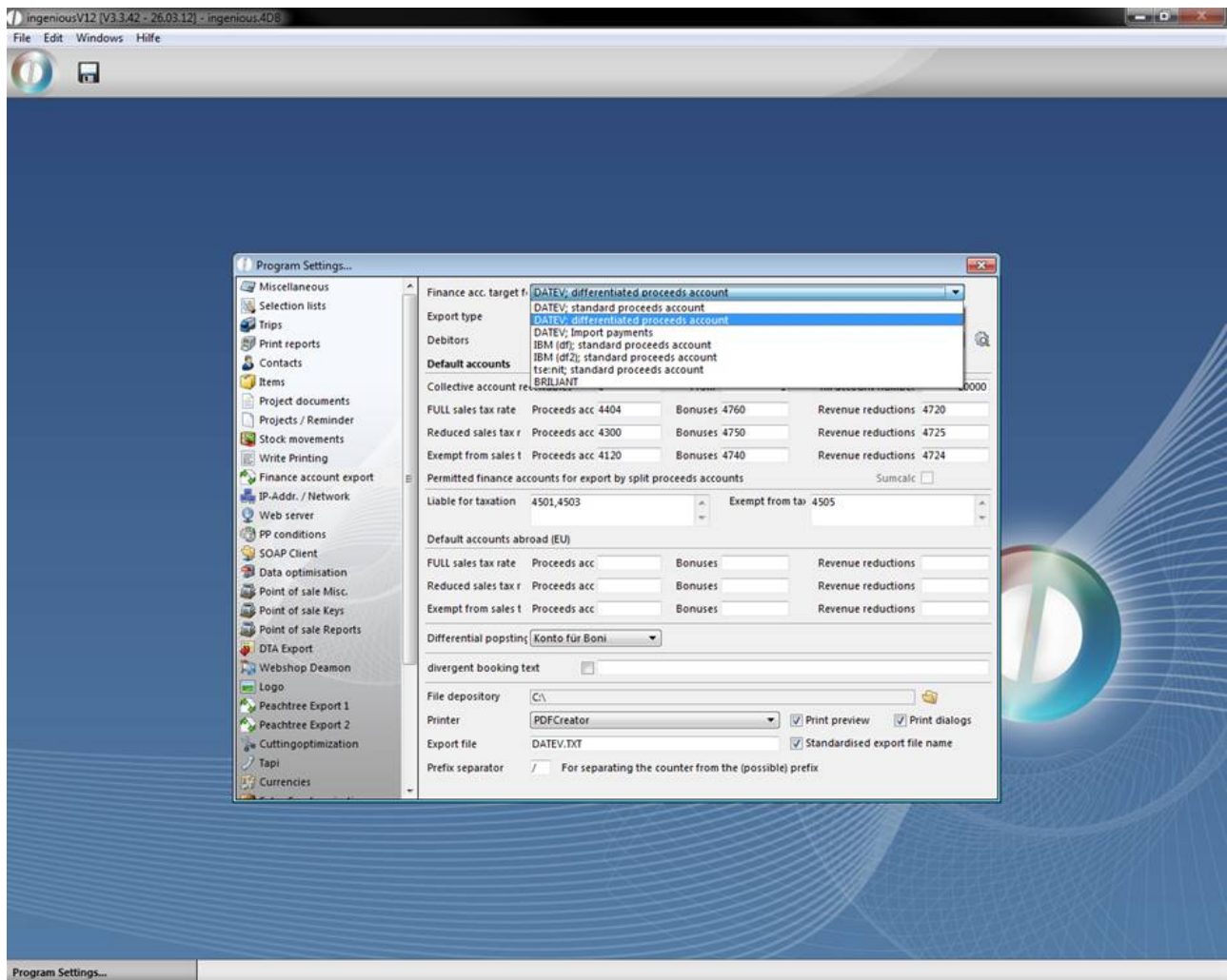
Settings in ingenious.V12

In order to export data in DATEV format, for example, diverse entries are necessary in the program settings (in the menu item, "Other").



Finance account export settings

It must be determined with which format you would like to export / import your data. In addition, the different export possibilities such as "DATEV; standard proceed accounts", "DATEV; differentiated proceed accounts", "IBM (df); standard proceed account" and the import option "DATEV - import payments" are available to you. Aside from the DATEV interfaces it is also possible to transfer finance data to the IBM financial accounting



Standard proceed accounts

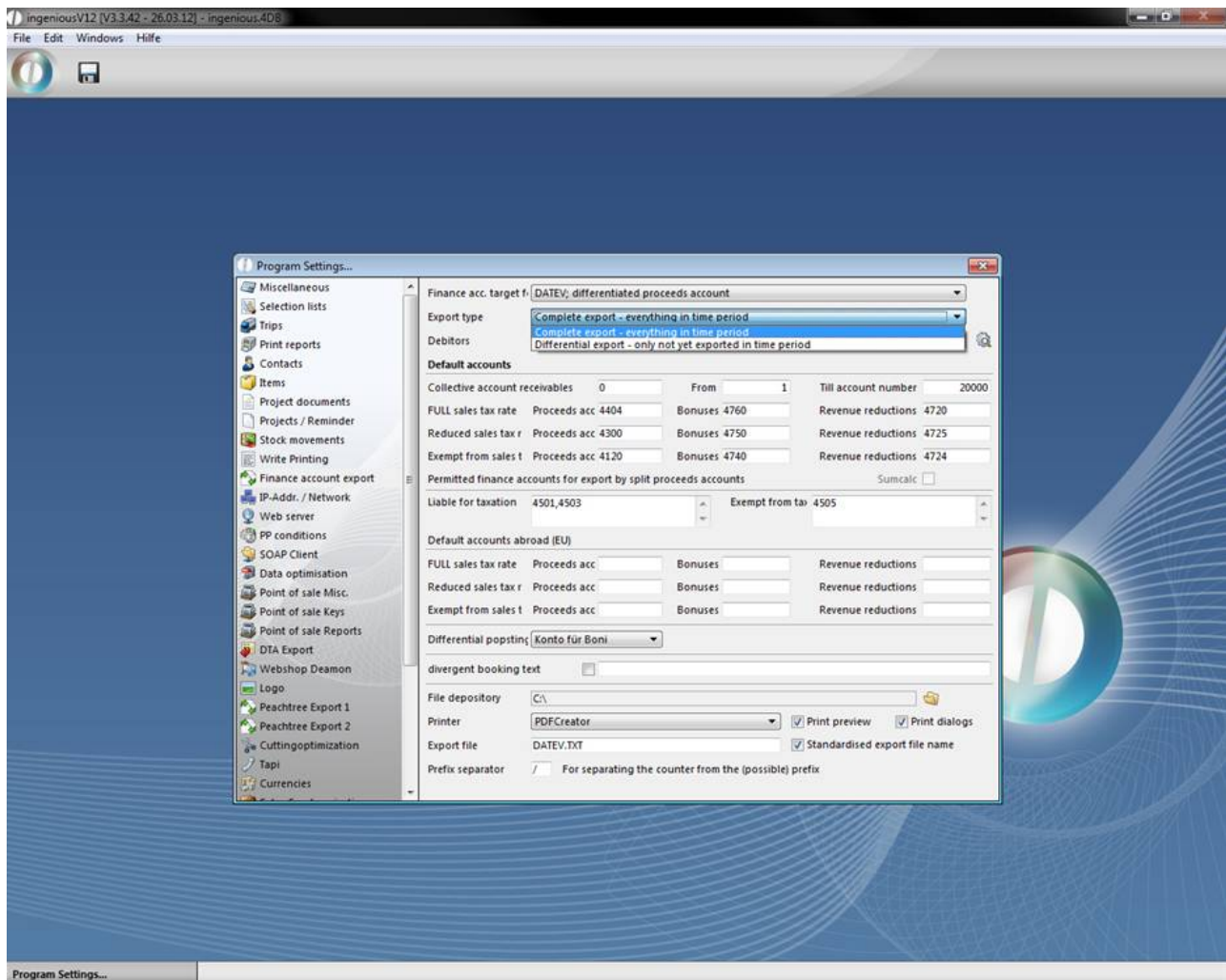
With this setting the proceeds are booked in one of three standard accounts (FULL USt rate, half a USt rate, USt free) or premium and proceed accounts.

Differentiated proceed accounts

With this option, the proceeds on more than only nine standard accounts can be booked. In the area, "Taxable" or "Tax-free", you have the possibility to give other permissible revenue accounts for the export. If the proceed account to be exported is placed in these fields, it is added to the export file. Otherwise it is booked on one of the standard accounts.

Import payments

With this setting, you can import payments that were worked on with external applications. The selection field "Export type" serves to define the data amount of the export. Here you have the choice between the "Complete export" and the "Difference export".



Complete text export

The "Complete text export" exports all projects that have been completed in the set time period. With this variation, completed projects can be exported several times.


Difference export

With the "Difference export" setting, only the projects, which were not exported with the last difference export, are exported.

In the "Standard accounts" area, you can define your revenue and revenue proceed accounts, according to your account parameter. Also, the debtor collective account must be entered. If an accounts receivable lies outside the entered values in the fields "From" and "To account number", the projects of the debtor are booked on the "Debtors collective account". The "Taxable" or "Tax-free" fields only matter if the target format "DATEV; differentiated revenue accounts" were entered in the FIBU target format field. Then other proceed accounts which are considered during export can be entered here.

In order to be able to differentiate between the different national tax regulations, there is an area "Standard accounts of EU foreign country". This contains the fields: "USt rate", "Bonuses" and "Reduction in earnings".

View of the file attachment and printout

With the  button, the path is determined for the export file. The pop-up field "Printer" indicates all installed printers for the selection as an output device. The two checkboxes "Print preview" and "Show print dialog" show the two the corresponding windows, which offer a lot of information and settings for the printout. The file can be named in the input field "Export file". With the checkmark, "Make export data consistent" you make sure that the file name you selected is always used. Without this checkmark, a new file name will be generated with each export, according to the following template: Fibu_Export_XZ_YYYYMMDDhhmmss.txt.

- X = 2 Differentiated revenue account
- Z = 1 Complete text export – All in a time period

= 2 Difference export - Not yet exported

YYYY = Year specification, i.e. 2003

MM = Monthly specification, i.e. 11

DD = Daily specification, i.e. 13

hh = Hourly specification, i.e. 16

mm = Minute specification, i.e. 54

ss = Hourly specification, i.e. 33

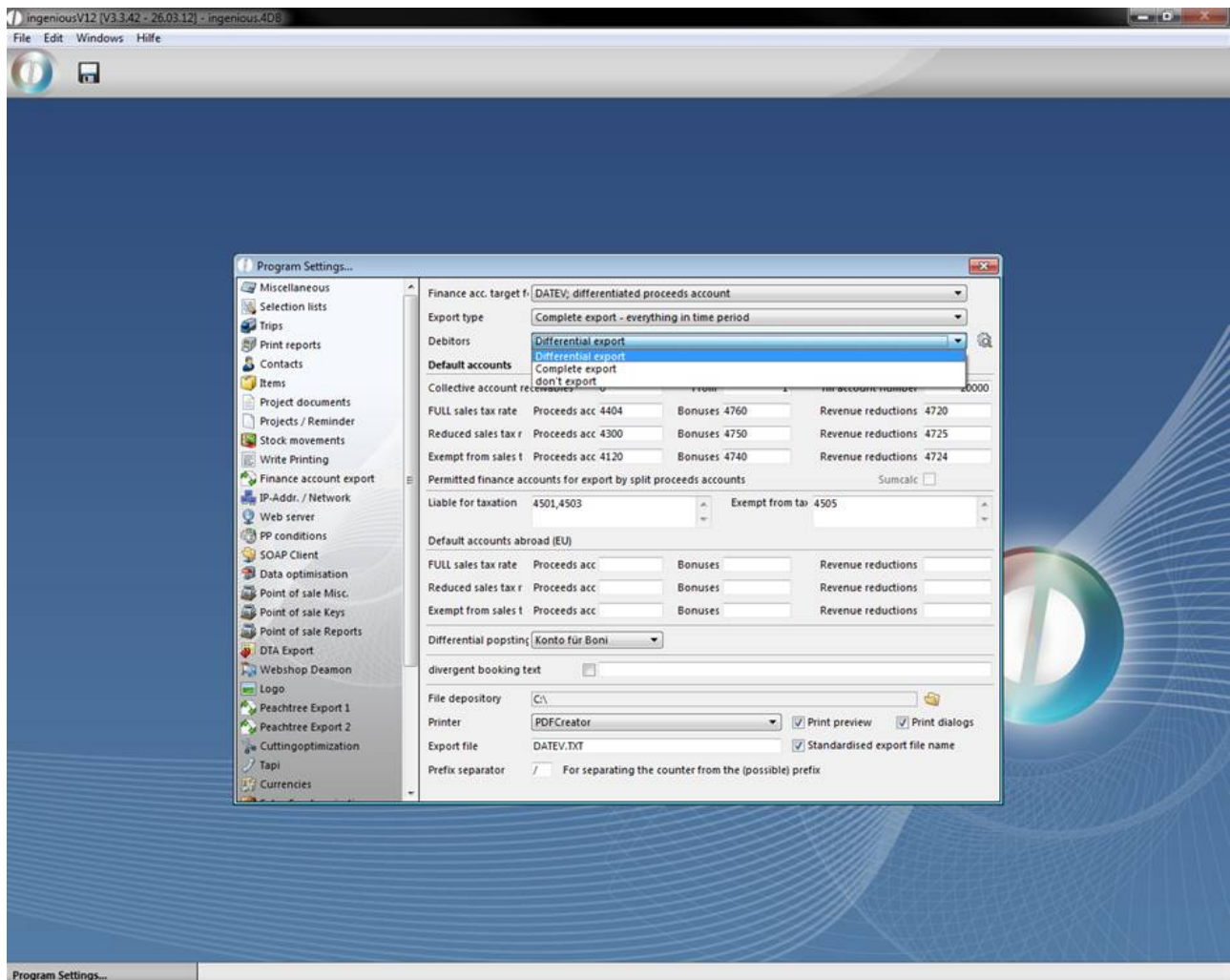
Example of an automatically generated file name: Fibu_Export_21_20031113165433.txt


Additionally you can export records of debtors. In this drop down menu you can choose between:

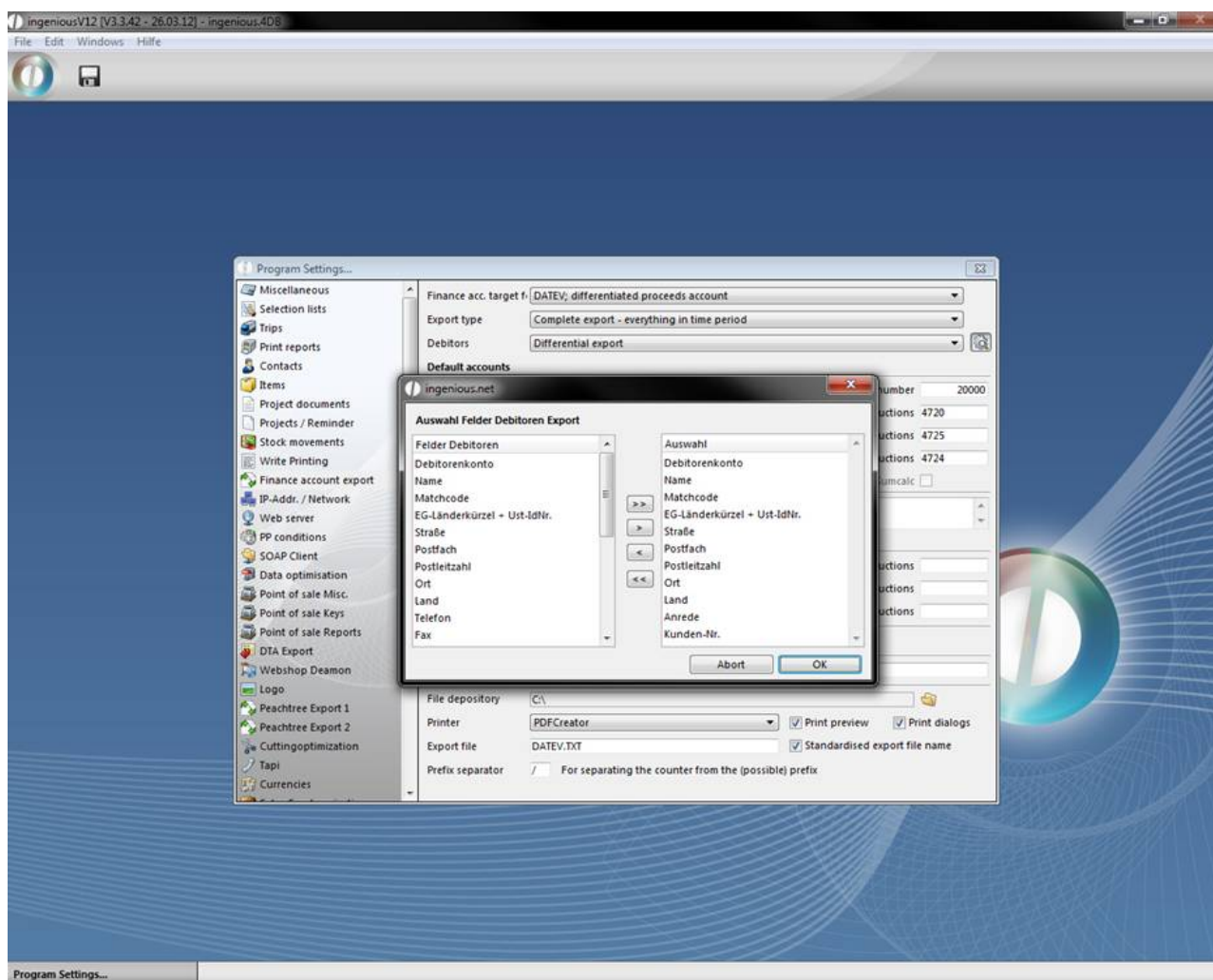
Complete export – exports all records of the debtors, independently whether it was exported already or not

Differential export – exports only records, which were not exported already

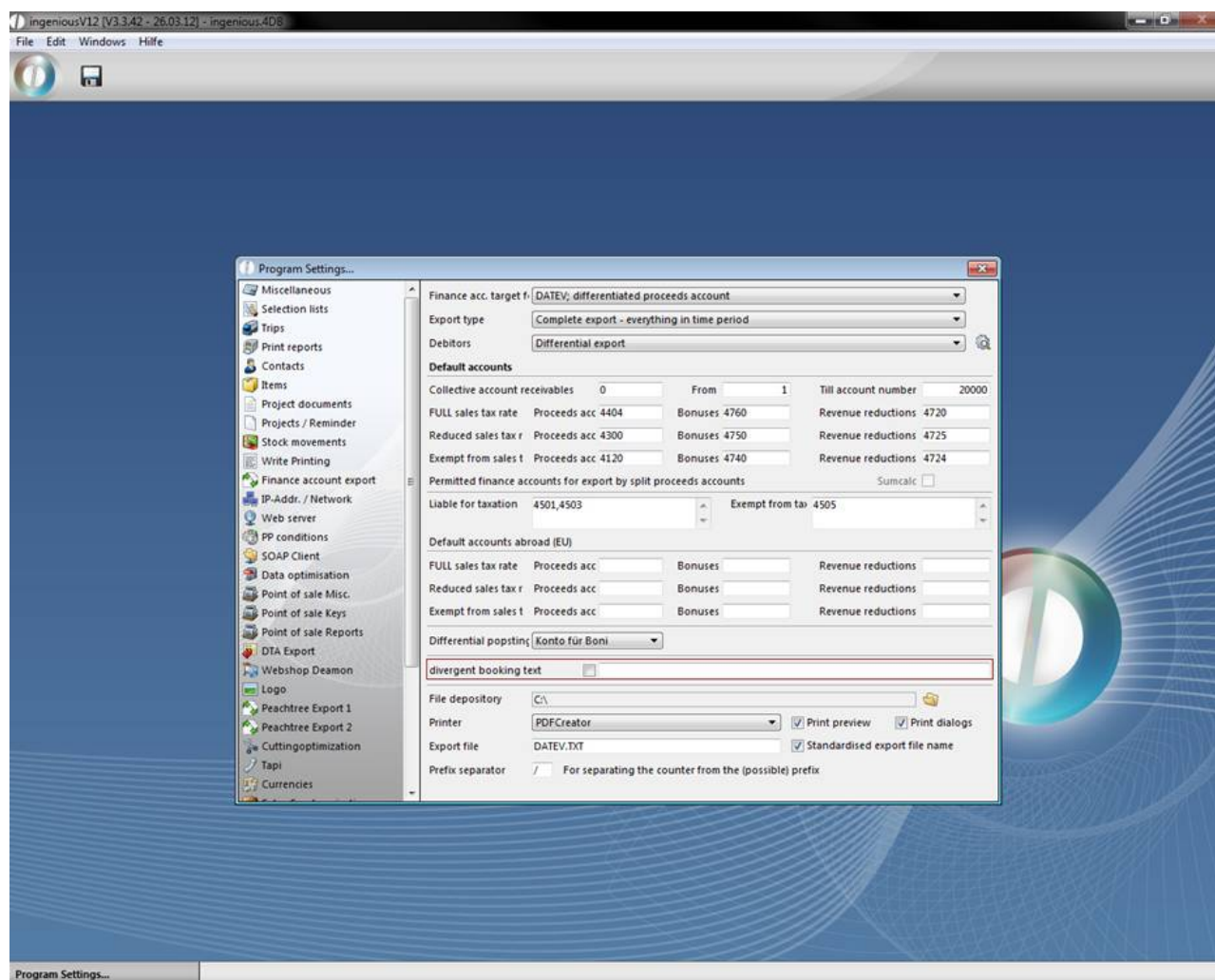
Don't export – exports no debtors records.



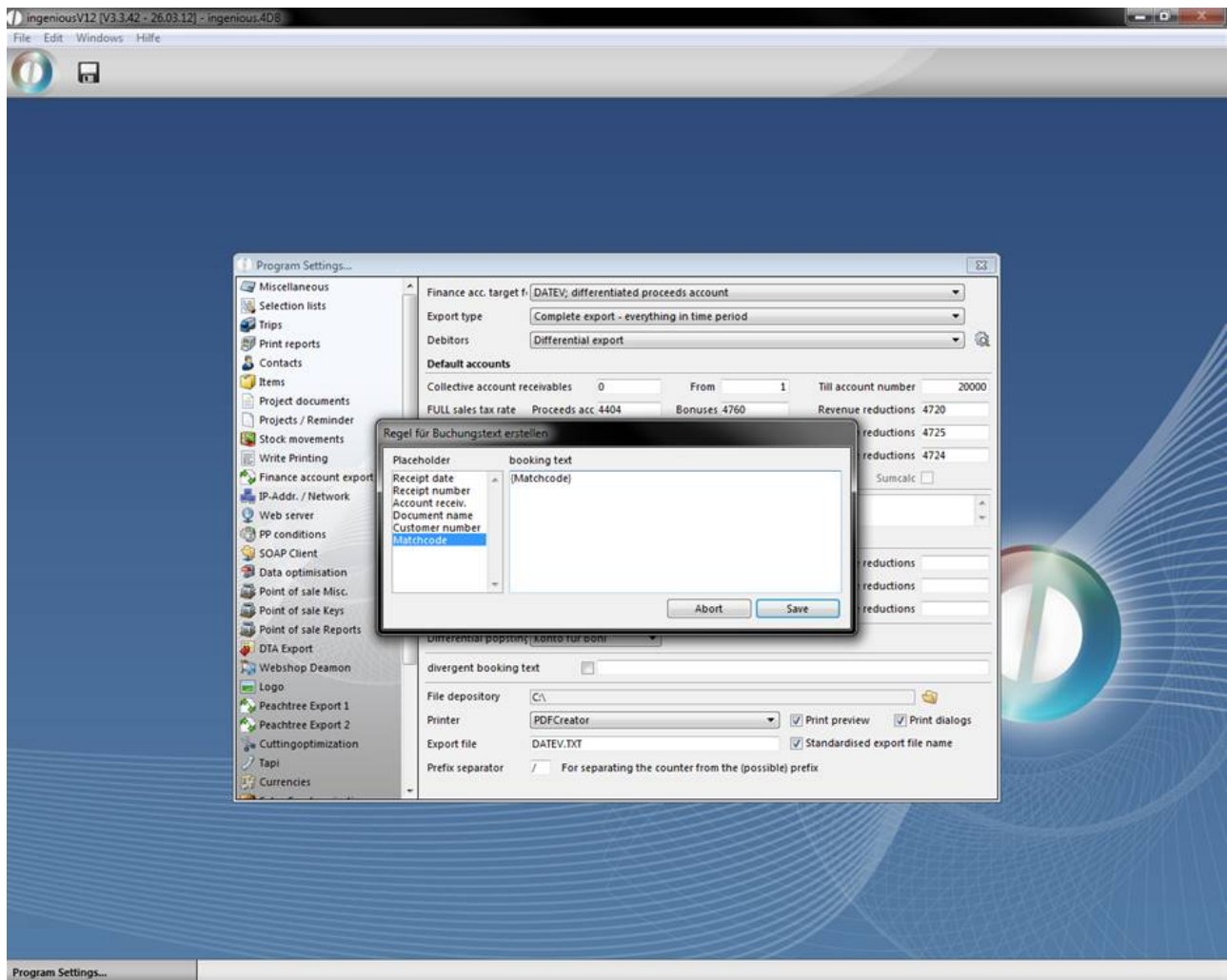
When you click the button  next to the debtors drop down menu a window will open up, where you can choose which debtor record information you want to export.



The check box "divergent booking text" enables you to modify the booking text of the output file. By default the booking text is a combination of the document type and the document number (for instance Invoice 123456).

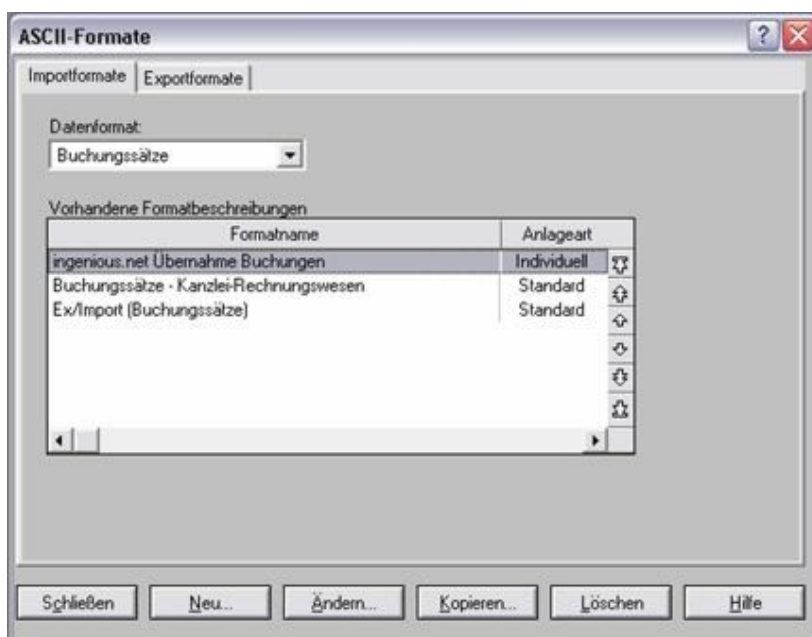


A click in the input field next to the check box will open a dialog window, which will help you with the modification of the booking text. By double clicking "matchcode" the needed placeholder is added to the field.

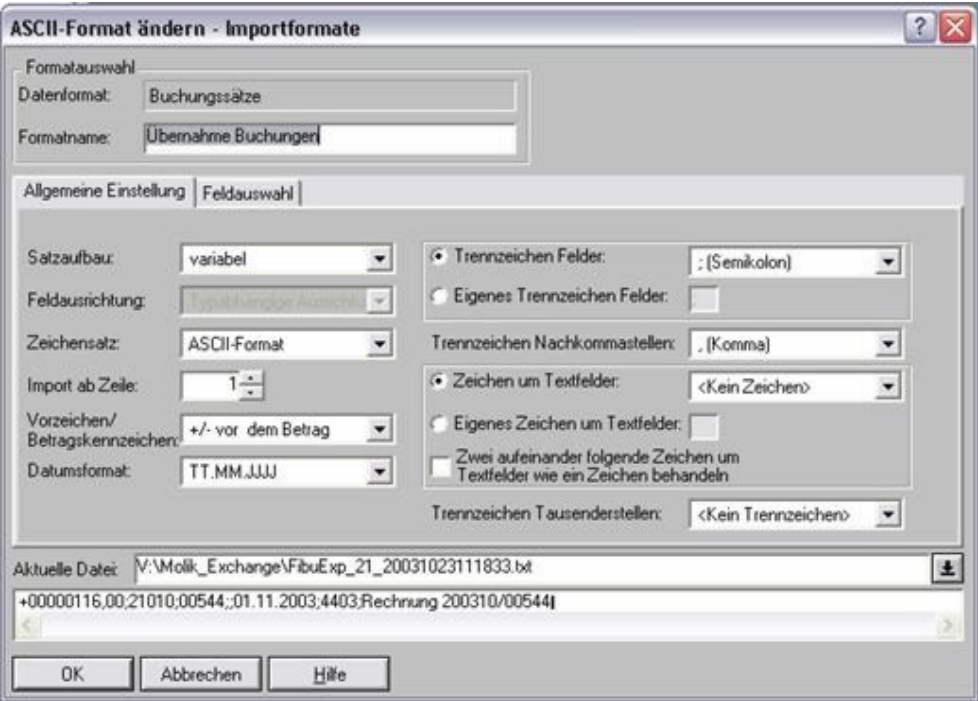


Settings in DATEV

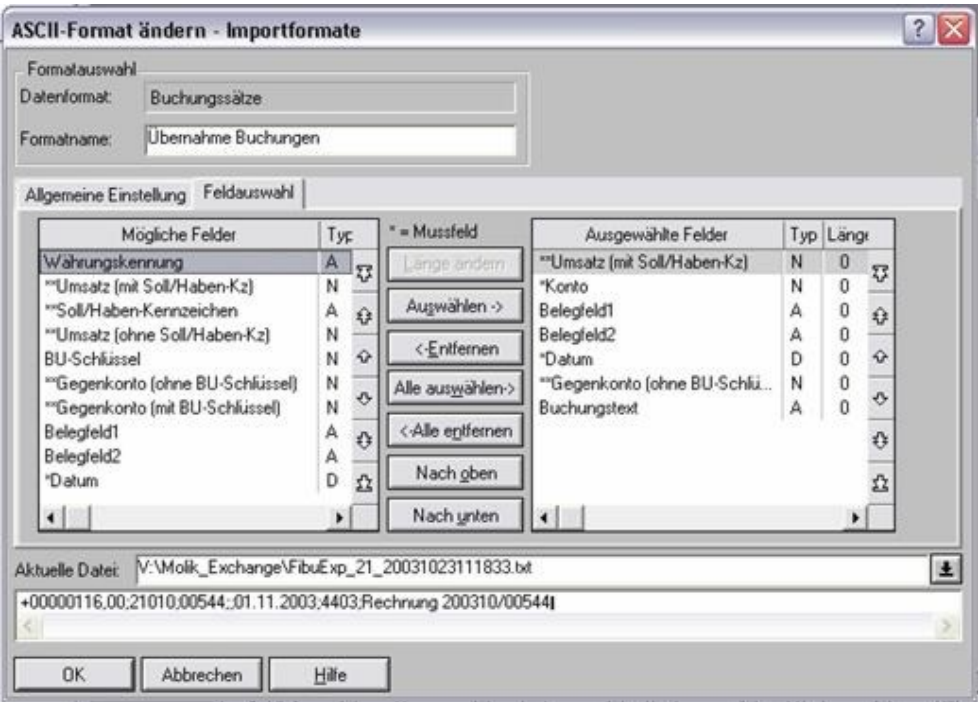
The import format can be set in DATEV as follows:



Setting of the import filter



General Settings



Field selection

Example export

In order to make the export function more understandable, two examples with the precise working steps of Ingenious.V12 follow. If you want to work through the following export examples (uniform and differentiated revenue accounts) synchronically to the manual, then you need two new contacts: "Peter Lustig" and "Peter Pahn". Assign characteristics for the contacts as follows:

Matchcode: Peter Lustig
Customer number: 151515

Accounts receivable: 19998

Sales tax status: Yes

Matchcode: Peter Pahn

Customer number: 151516

Accounts receivable: 19999

Sales tax status: No

In addition, you need the following six sales articles with individually assigned unit prices:

Matchcode: A1 Article number: 101 Proceeds account: 4501 Vat rate: Full

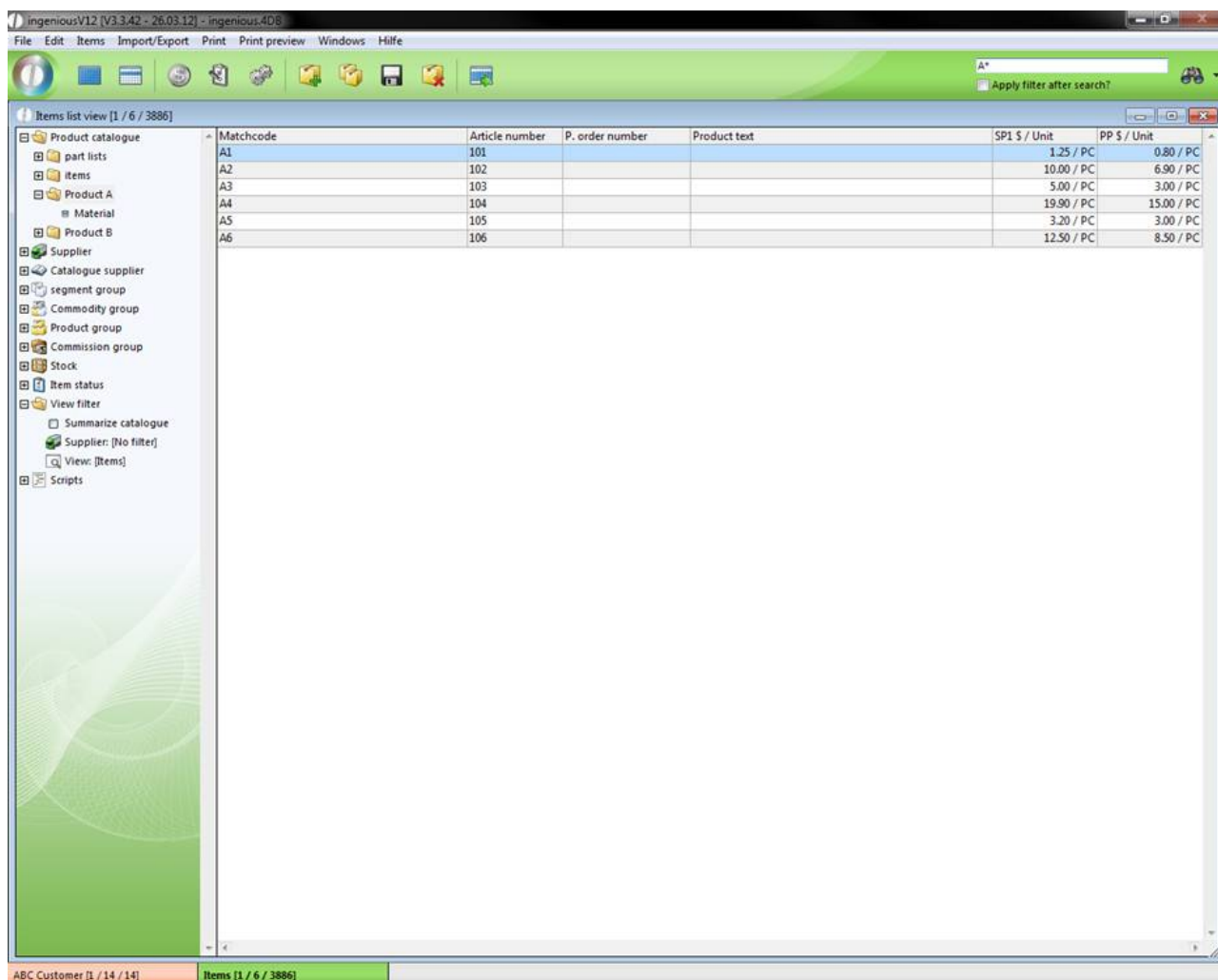
Matchcode: A2 Article number: 102 Proceeds account: 4502 Vat rate: Full

Matchcode: A3 Article number: 103 Proceeds account: 4503 Vat rate: Half

Matchcode: A4 Article number: 104 Proceeds account: 4504 Vat rate: Half

Matchcode: A5 Article number: 105 Proceeds account: 4505 Vat rate: None

Matchcode: A6 Article number: 106 Proceeds account: 4506 Vat rate: None



Matchcode	Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
A1	101			1.25 / PC	0.80 / PC
A2	102			10.00 / PC	6.90 / PC
A3	103			5.00 / PC	3.00 / PC
A4	104			19.90 / PC	15.00 / PC
A5	105			3.20 / PC	3.00 / PC
A6	106			12.50 / PC	8.50 / PC

View of the item

Now you must still create an invoice for Peter Pahn and Peter Lustig with the six items (from A1 to A6). Please do not forget to set the date.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Apply filter after search?

Projects detail view [Peter Lustig] - [Invoice 104262012/00049]

Header text

Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	A1	101		1.00	1.25	1.25	1.25	0.00	1.25	0.
002	A2	102		1.00	10.00	10.00	10.00	0.00	10.00	6.
003	A3	103		1.00	5.00	5.00	5.00	0.00	5.00	3.
004	A4	104		1.00	19.90	19.90	19.90	0.00	19.90	15.
005	A5	105		1.00	3.20	3.20	3.20	0.00	3.20	3.
006	A6	106		1.00	12.50	12.50	12.50	0.00	12.50	8.

PP [USD] 37.20 Before CM = 14 USD 37% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD]

Net [USD] 51.85 After CM = 14 USD 37% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00 51.85

Footer text

[Invoice 104262012/00049]

Items from Peter Lustig

Both projects differ only due to the fact that you give a discount of 30% to Peter Pahn.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Peter Pahn] - [Invoice 04262012/00048]

Apply filter after search?

Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	A1	101		1.00	1.25	1.25	1.25	0.00	1.25	0.80
002	A2	102		1.00	10.00	10.00	10.00	0.00	10.00	6.90
003	A3	103		1.00	5.00	5.00	5.00	0.00	5.00	3.00
004	A4	104		1.00	19.90	19.90	19.90	0.00	19.90	15.00
005	A5	105		1.00	3.20	3.20	3.20	0.00	3.20	3.00
006	A6	106		1.00	12.50	12.50	12.50	0.00	12.50	8.50
Subtotal							51.85		51.85	37.20
Rebate 30%							-15.56		-15.56	

PP [USD] 37.20 Before CM = -1 USD -4% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD] 36.29

Net [USD] 36.29 After CM = -1 USD -4% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00

Footer text

[Invoice 04262012/00048]

Items from Peter Pahn

Close the projects and forward every project to a "Credit". In every credit, you delete the articles "A2", "A4", "A6" from the items and close them as well.

Positions from Peter Lustig

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious.408

File Items Options View Print Print preview Windows Hilfe

Projects detail view [Peter Pahn] - [Credit note 04262012/00003]

Header text

Item	Items	ArtNo.	Name	Quantity	Flat pr.	Unit pr.	Net	VAT	Gross	PP
001	A1	101		1.00	1.25	1.25	1.25	0.00	1.25	0.
002	A3	103		1.00	5.00	5.00	5.00	0.00	5.00	3.
003	A5	105		1.00	3.20	3.20	3.20	0.00	3.20	3.
Subtotal							9.45		9.45	6.
Rebate 30%							-2.84		-2.84	

Footer text

PP [USD] 6.80 Before CM = 0 USD -4% Calculated time 00:00 ☒ Deducted discount VAT 0% 0.00 Gross [USD] 6.61

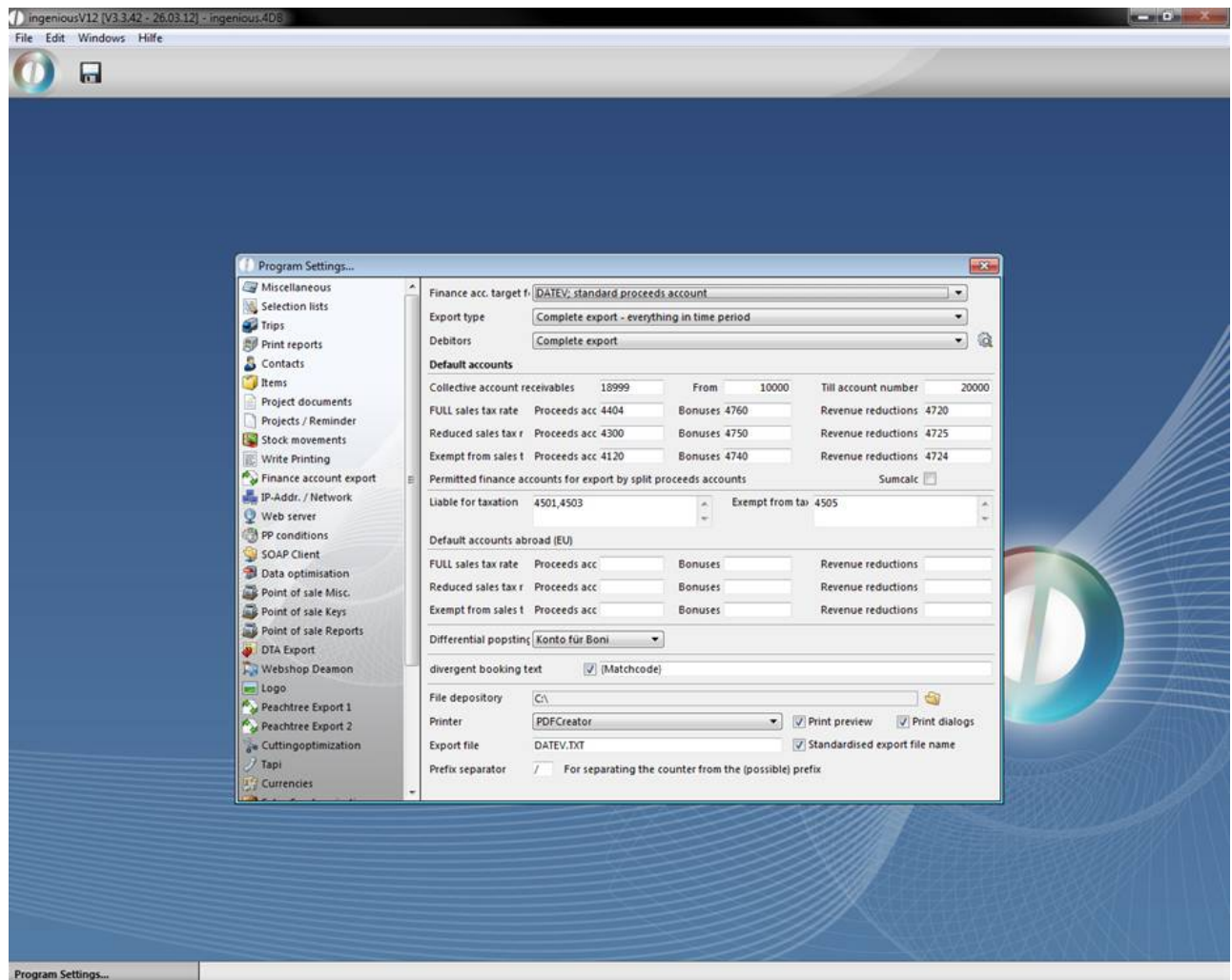
Net [USD] 6.61 After CM = 0 USD -4% Incl. final costing 00:00 Commission [USD] 0.00 VAT 0% 0.00

[Credit note 04262012/00003]

Items from Peter Pahn

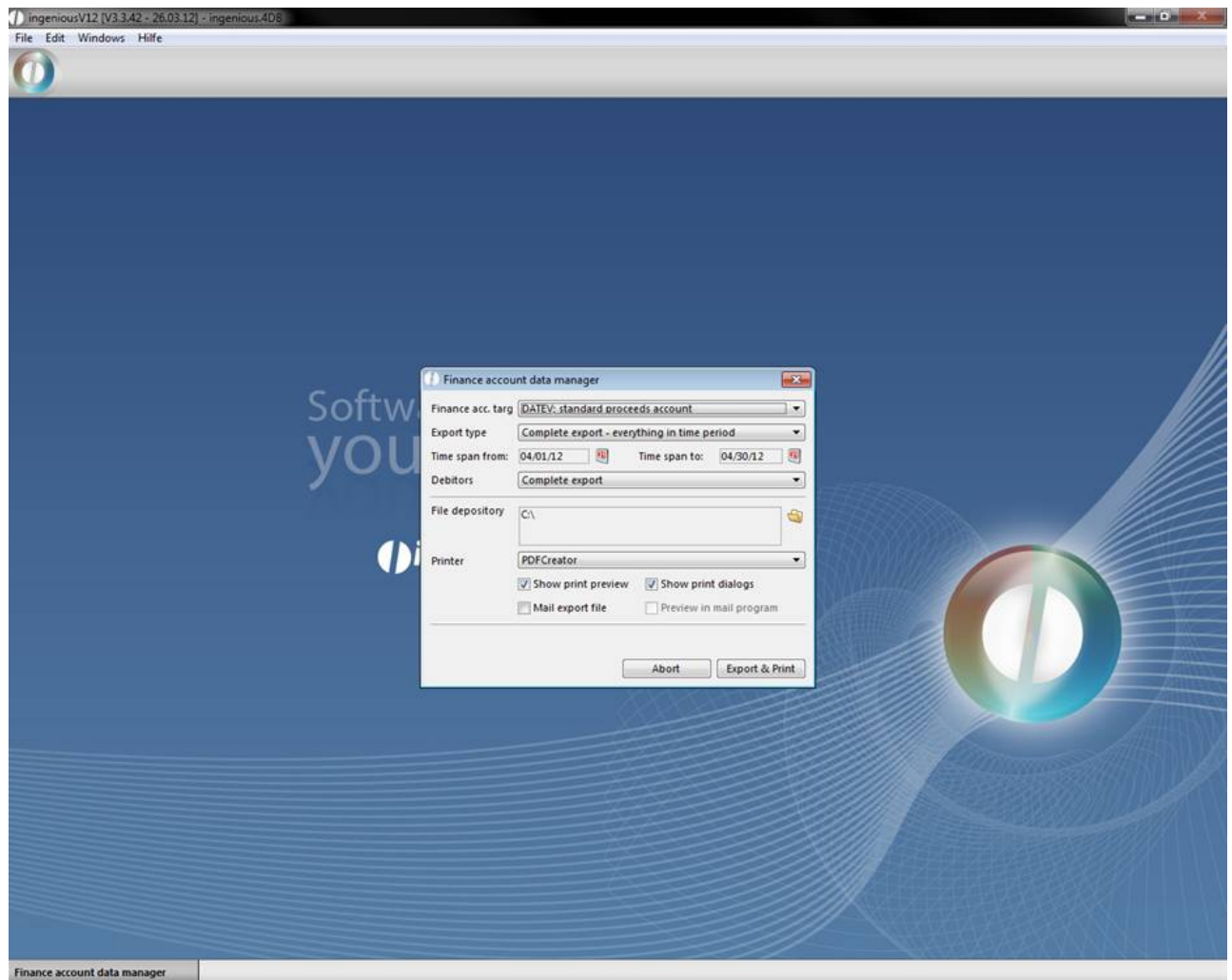
Practice with standard proceed accounts

1. Open the "Finance account export" column from the program settings and change the settings according to the following picture:

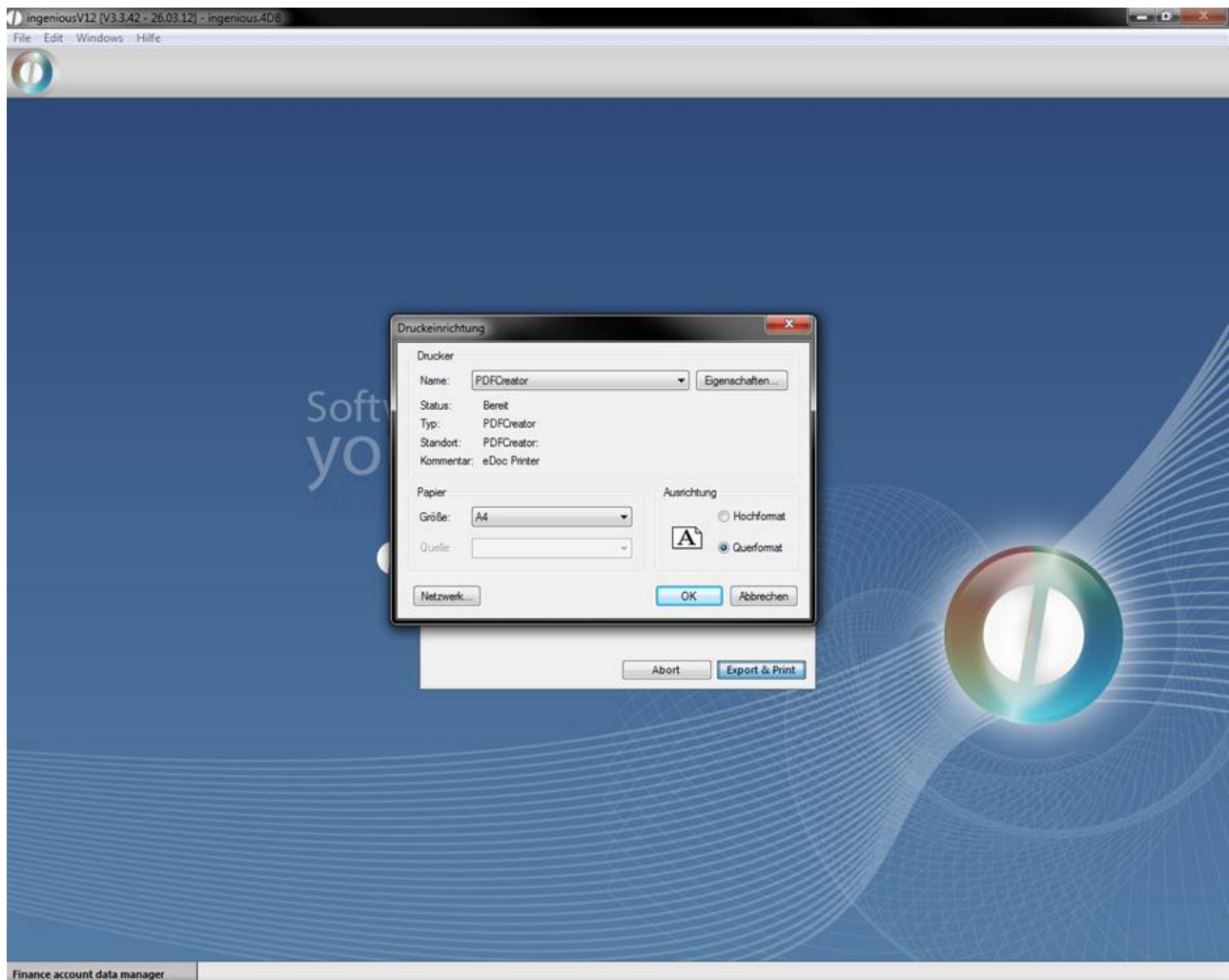


View of the general settings of the FIBU Export

2. Select the Finance account data manager.



3. Press the button, "Export & Print" in order to begin the export. In case you do not want to have a printout of the export file, click in the suitable window on "Cancel".



You now find the "DATEV.TXT" export record in the "Own fields" folder. The following modified picture should explain the contents of such an export file to you a little more closely.

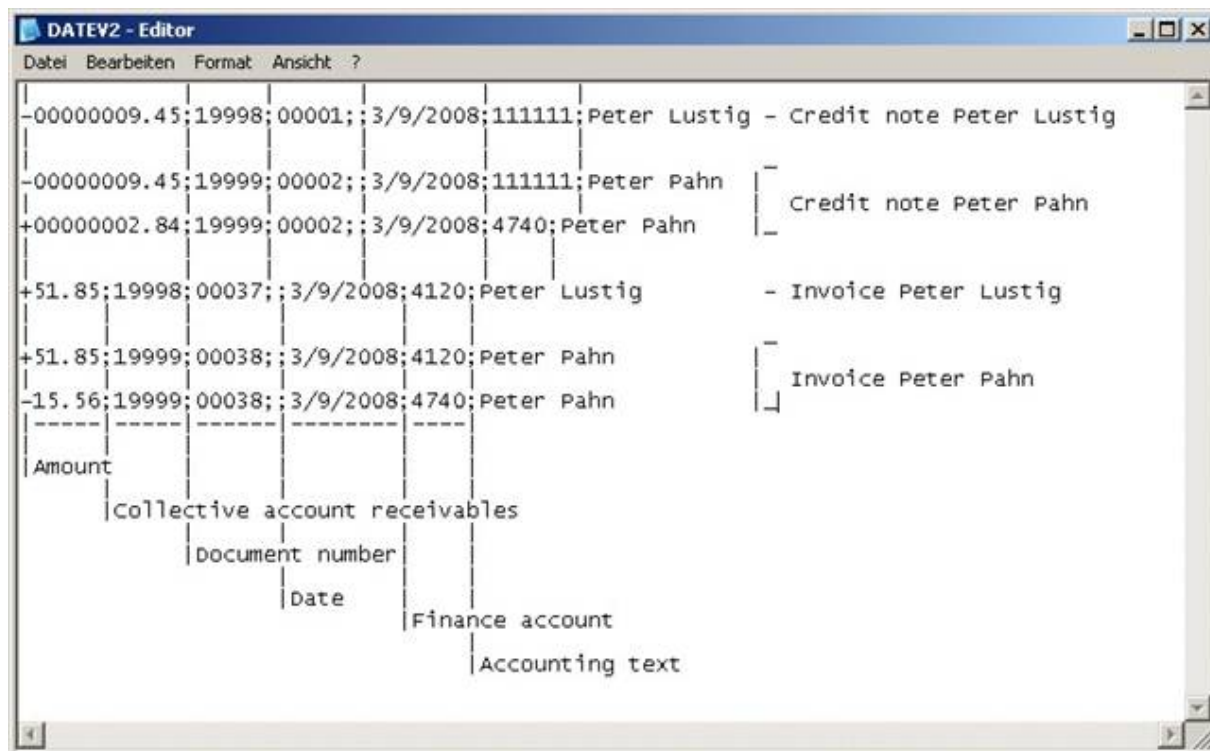
Amount	Date	Finance account	Accounting text
-00000009.45	19998; 00001; 3/9/2008	111111	Peter Lustig - Credit note Peter Lustig
-00000009.45	19999; 00002; 3/9/2008	111111	Peter Pahn
+00000002.84	19999; 00002; 3/9/2008	4740	Peter Pahn
+00000051.85	19998; 00037; 3/9/2008	111111	Peter Lustig - Invoice Peter Lustig
+00000051.85	19999; 00038; 3/9/2008	111111	Peter Pahn
-00000015.56	19999; 00038; 3/9/2008	4740	Peter Pahn
Collective account receivables			
Document number			
Date			
Finance account			
Accounting text			

Modified export data DATEV.TXT

Practice with the differentiated proceed accounts

1. Open the "FIBU export" column in the program settings and enter "Differentiated proceed accounts" in the FIBU format. Change the name of the export file in "DATEV2. TXT".
2. Select the FIBU Data Manger in the main menu. Leave the settings and click on the button "Export & Print".
3. In the window, select "Print settings" again regardless of whether or not you want a printout or not.

You will again find the export file "DATEV2. TXT" in the "Own files" folder. The following two pictures make the contents of the export file clear.



Modified export data DATEV2.TXT

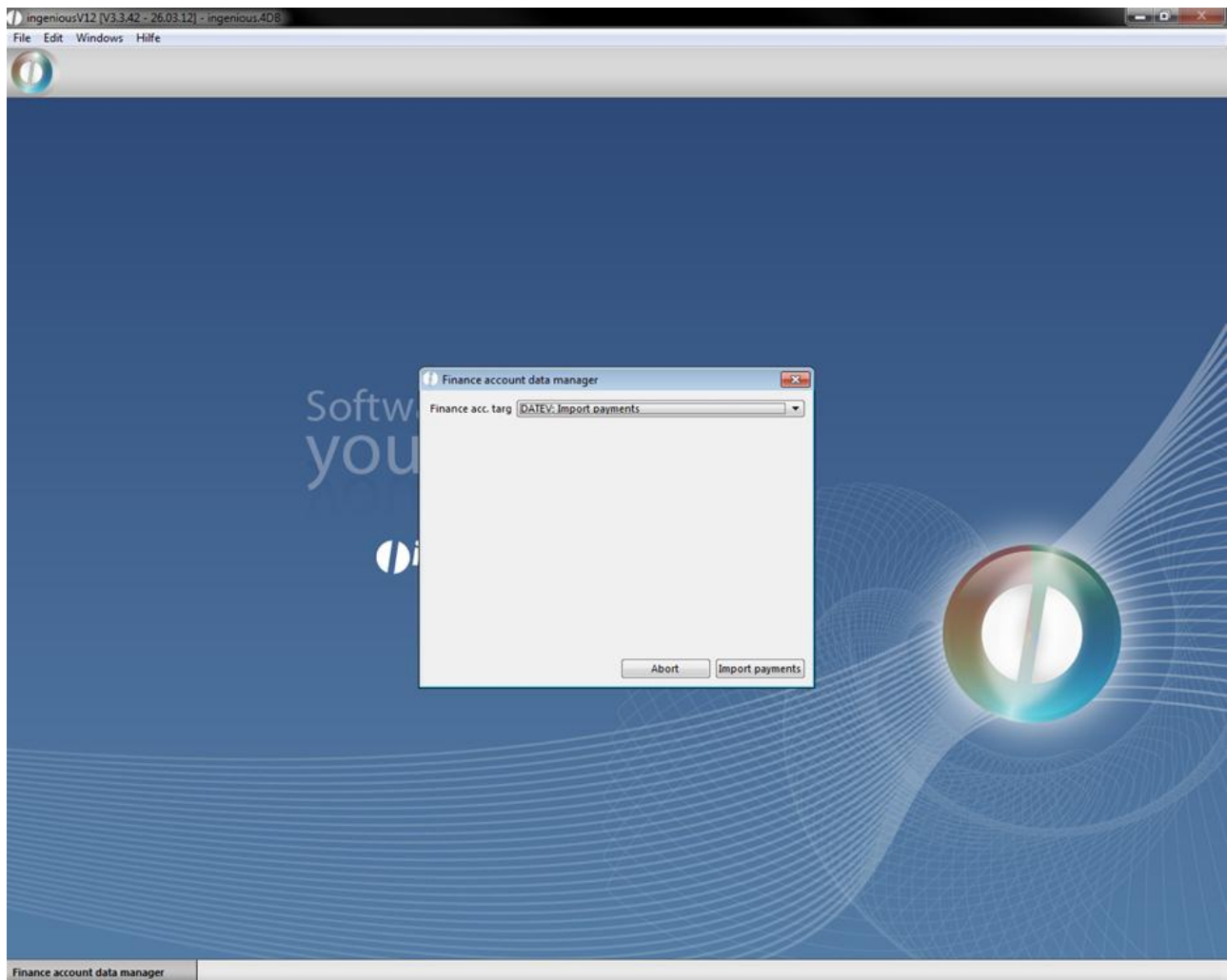
The screenshot shows a window titled "DATEV2 - Editor" with a menu bar (Datei, Bearbeiten, Format, Ansicht, ?). The main area contains a list of accounting entries in a fixed-width format. Below the list is a legend identifying the fields: Amount, Collective account receivables, Document number, Date, Finance account, and Accounting text.

Amount	Collective account receivables	Document number	Date	Finance account	Accounting text
-00000009.45	19998	00001	3/9/2008	111111	Peter Lustig - Credit note Peter Lustig
-00000009.45	19999	00002	3/9/2008	111111	Peter Pahn
+00000002.84	19999	00002	3/9/2008	4740	Peter Pahn
+51.85	19998	00037	3/9/2008	4120	Peter Lustig
+51.85	19999	00038	3/9/2008	4120	Peter Pahn
-15.56	19999	00038	3/9/2008	4740	Peter Pahn

DATEV2.TXT with information

Importing payments

While importing payments, "Import of payments" must be entered as a FIBU target format in the program settings and then the FIBU data manager must be carried out. Afterwards, the file to be imported is selected to begin. After the import is finished, the faultily imported payments are listed if necessary in the window "Error log". These must be then completed by hand. The imported payments are then listed in the project detail view in the "Payments" column.

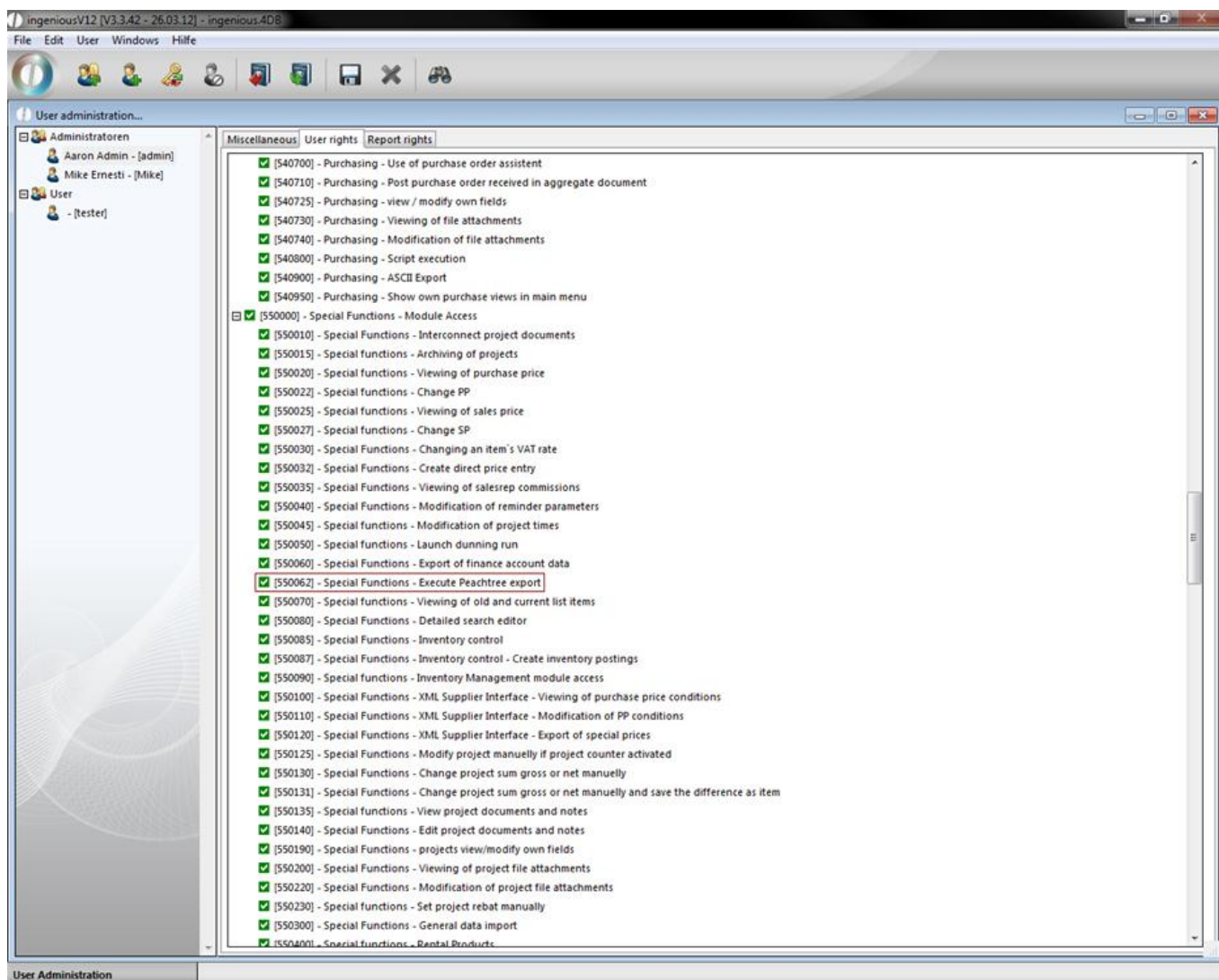


View of the FIBU Data Manager

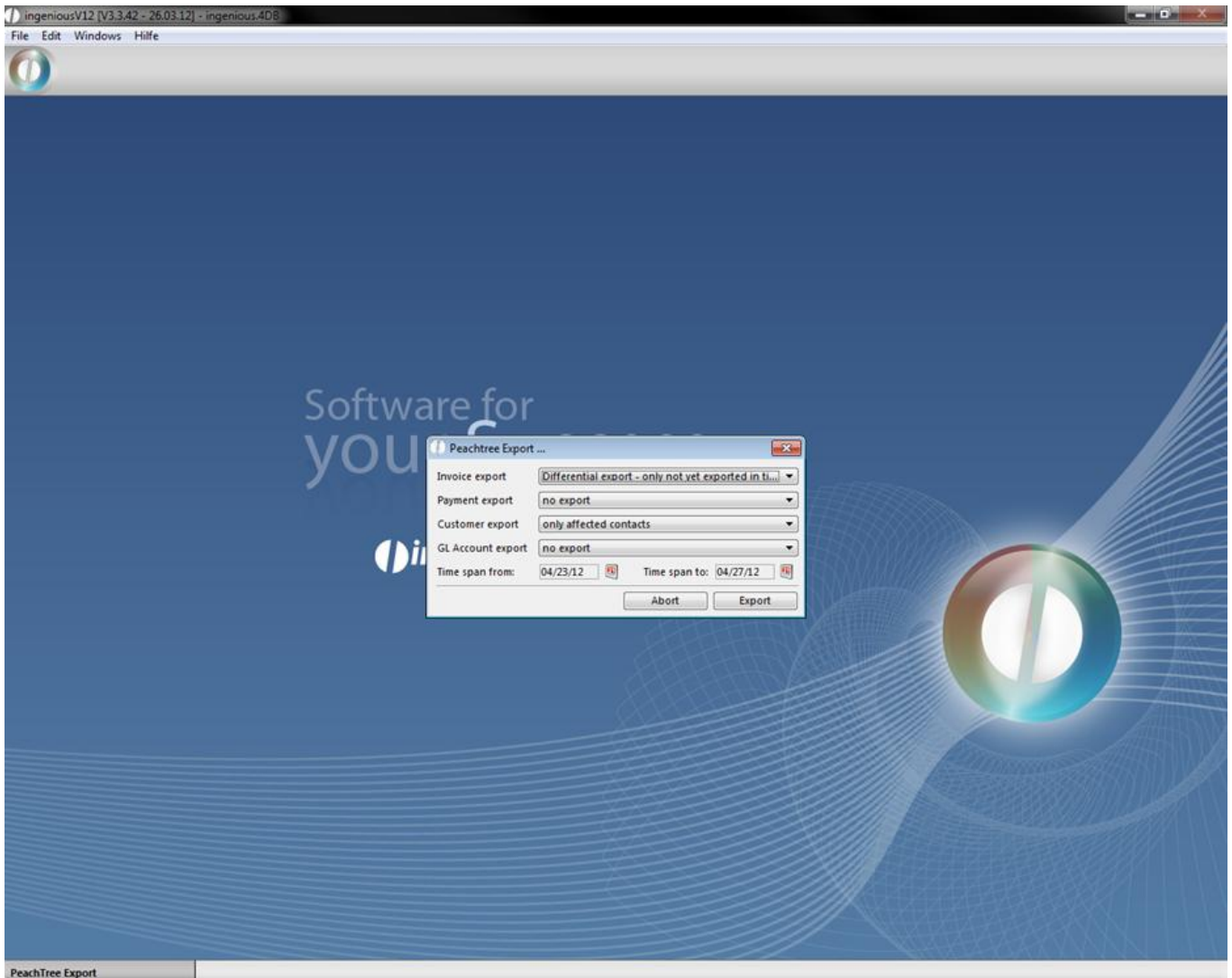
5.2 Peachtree Export

US America only

The Peachtree Export function was developed especially for the US American market because this export form is primarily used there. The following examples should provide only a rough impression of the use of this export form. With the Ingenious.V12 Peachtree interface, customer data and project data from Ingenious.V12 can be transferred to Peachtree. The configuration of the interface parameters occurs in the program settings. The menu items for configuration and export are visible only if one owns the module rights, as well as the user right for the export.



The Peachtree Export interface consists of a contact export, a calculation export and an export of GL Sales / AR Accounts.



Starting example of the import in Ingenious.V12

Contact export

The contact export can often be exported arbitrarily. Besides, the already created contacts in Peachtree are mainly signed over. Changes to the contacts made in Peachtree therefore get lost. Therefore, the adaptation of contact data should occur exclusively in Ingenious.V12.

Invoicing export

The import of an invoice in Peachtree is only possible once. Therefore, the invoicing export should also occur only once per invoice. For this purpose, the difference export is introduced for invoices. This export type ensures that an already exported invoice is ignored during all followings exports.

GL account export

With the GL Sales / AR Account Export, one can automatically export in articles, projects and contacts and accounts receivable and FIBU export accounts, and one can automatically create them as chart accounts (Sales and accounts receivables) in Peachtree. This export procedure is necessary only with an extensive application of Peachtree. With a restricted application, it is sufficient to manually create accounts without executing the export.

Settings and import in Peachtree

The export of the projects from Ingenious.V12 is created so that as little adaptations as possible have to be made by Peachtree. In order for the imports to function correctly, representatives, the sales tax and the suitable accounts must be created in Peachtree. With the representatives, the representative ID has to coincide with the representative's name in Ingenious.V12. The sales tax ID and Authority ID can be anything. They must be entered in front of the export in the program settings in the Tax Code ID field in the contacts and invoices areas. The GL Sales Account IDs can generally be any, but standard values should be used:

G/L Sales Account for	ID	Description	Account Type
Invoices	11000	Accounts Receivable	Accounts Receivable
Sales Tax	23000 / 23100	Sales Tax Payable	Other Current Liabilities
Customer	40000	Sales	Income
Article	40000	Sales	Income

Maintain Employees/Sales Reps

Employee ID:
 Name:

☐ Employee
☒ Sales Rep
☐ Both ☐ Inactive

General Custom Fields Pay Info Employee Fields Employer Fields

Address:
 City, ST Zip:
 Country:

Social Security #:
 Type:
 Telephone 1:

Withholding Information ☐ Pension ☐ Deferred

Payroll Field	Names	Filing Status	Allow	Additional Withholding	State / Locality
Federal	Single	0	0.00		
State	Single	0	0.00	GA	
Local	Single	0	0.00		

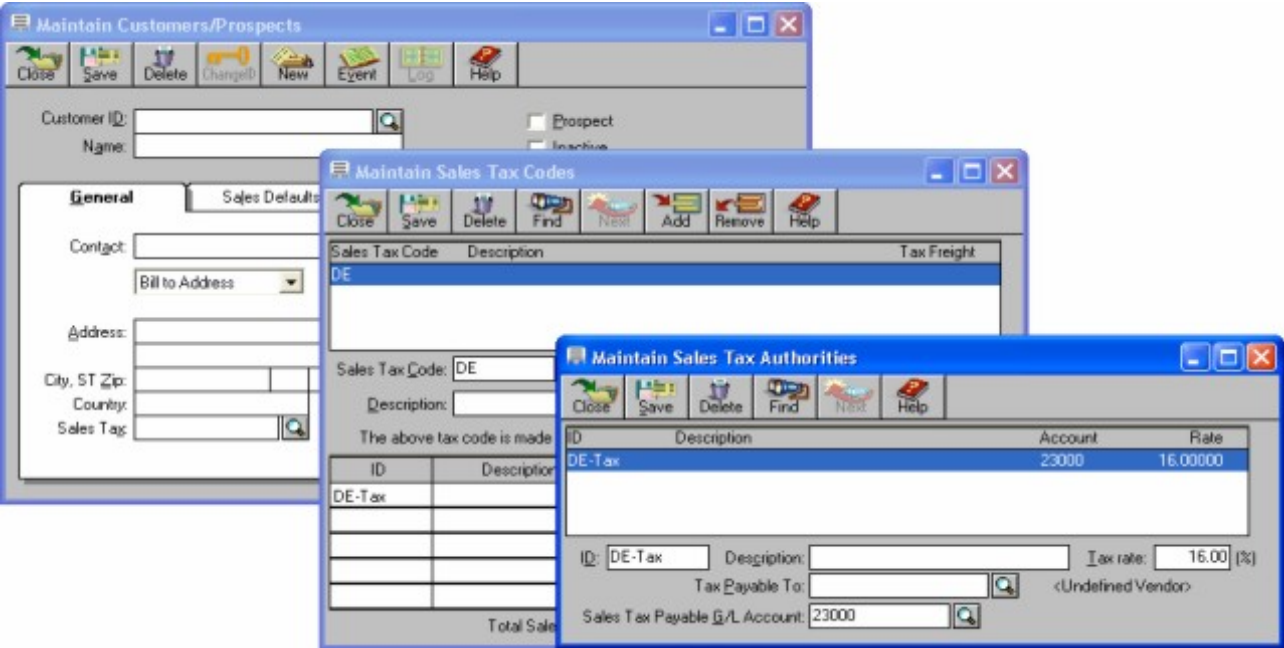
Dates:
 Hired:
 Last Raise:
 Terminated:
 Beginning Balances:

Sales
 Maintain
 Customers
 Sales Reps
 Sales Tax Authorities
 Sales Tax Codes

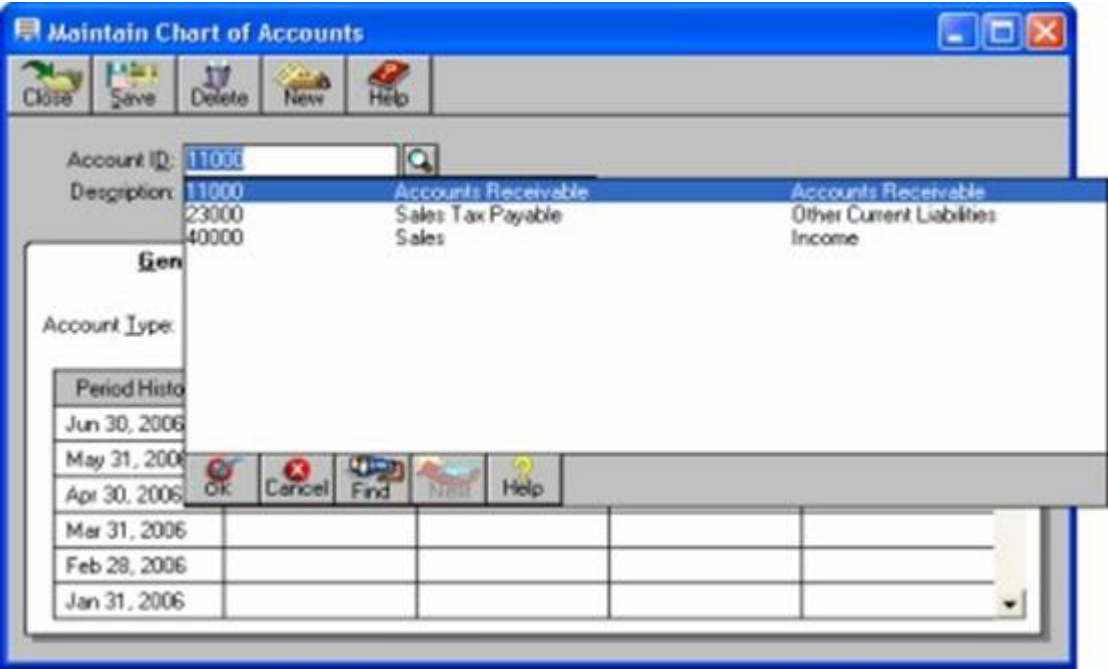
General Ledger
 Sales Orders
 Print Invoices
 Customer Statements
 Print Sales Orders

Sales Purchases General Ledger Payroll Inventory

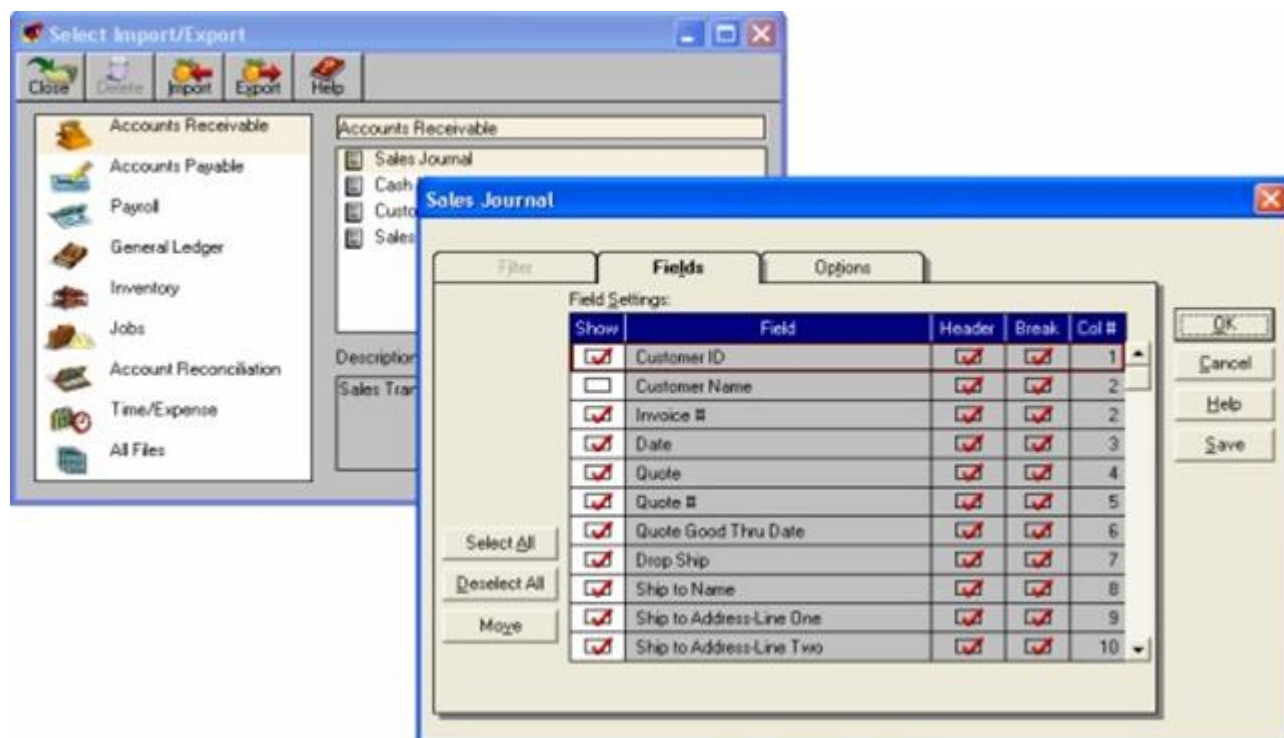
Creation of the representative in Peachtree



Creation of the Sales Tax in Peachtree



Creation of the accounts in Peachtree



Starting imports in Peachtree (Version 7)

5.3 Receipt entry

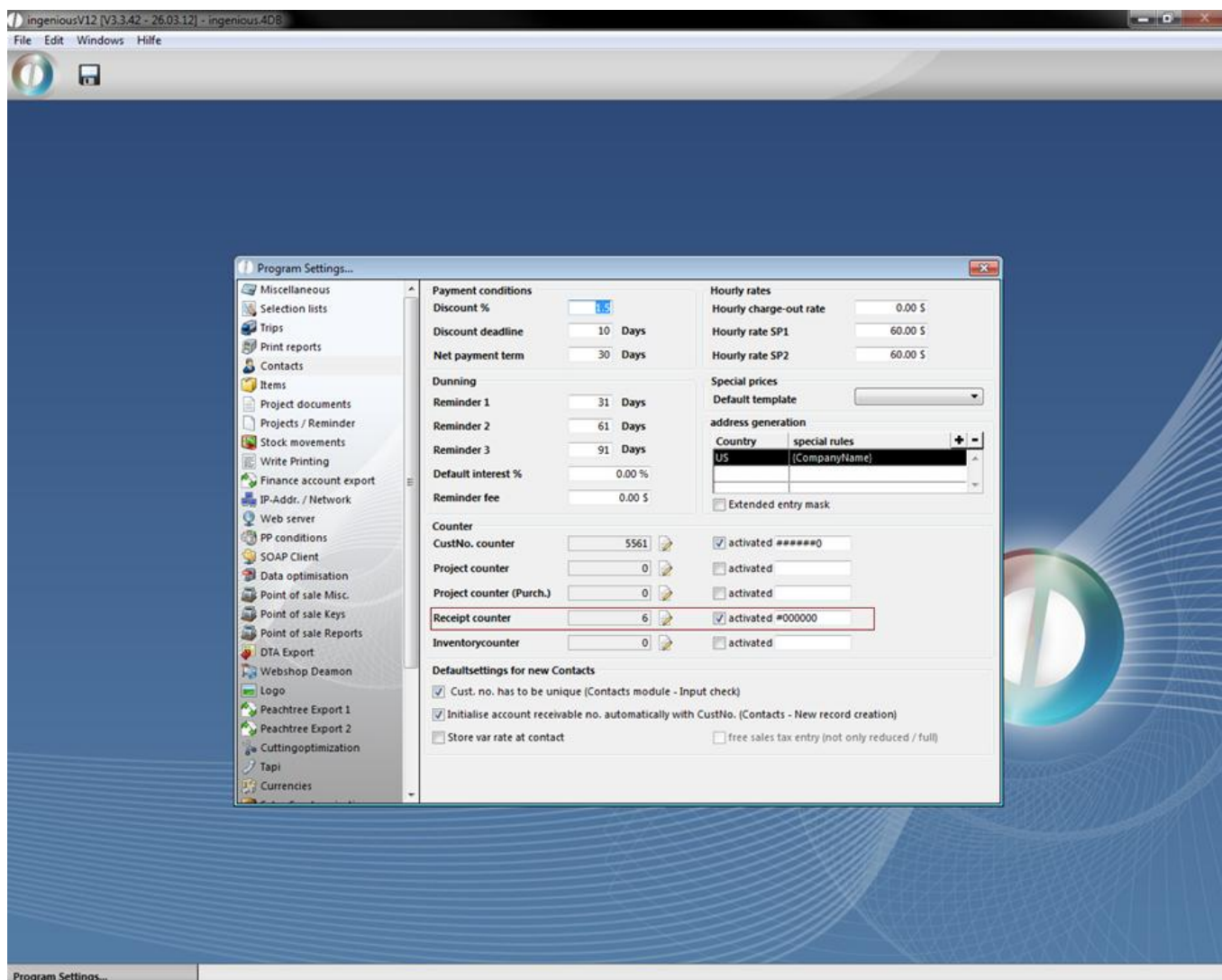
The receipt entry serves as a digital invoice book of receipts for the overview of all invoices from your suppliers. In the list view, all invoices of a certain period and/or supplier with the desired project status appear according to the filter choice.

Processing no.	Receipt no.	Receipt from/Contact (Matchcode)	Dct. deadl.	Net-paym. f/Net (\$)	Gross (\$)	Dt(%)	Paid on	Payment type
000003	123456	04/26/12 Supplier1	04/19/12	04/09/12 364.00 \$	364.00 \$	0	04/03/12	cash payment
000004	462158	04/14/12 Supplier2	04/27/12	04/29/12 50.00 \$	50.00 \$	10	00/00/00	check
000005	795135	00/00/00 Supplier1	00/00/00	00/00/00 9,000.00 \$	9,000.00 \$	0	00/00/00	cash payment
000006	894256	00/00/00 Supplier2	04/29/12	04/30/12 200.00 \$	200.00 \$	0	00/00/00	cash payment


The invoices that were already paid are shown in green in the list. For the not yet paid invoices, there are 3 color indicators: Invoices in red font are due in net or overdue; the invoices due that still lie within the discount payment term are indicated in orange and not yet paid, and invoices not yet due are shown in black. For the colored due date mark, two days were given as a buffer time, so that the payments can be released on time. In the lower window border, an analysis can be shown for selected documents. The overall turnover as well as open posts of the marked entry documents can be shown with [Show detail view](#) .

Assignment of document numbers

Ingenious.V12 automatically gives every document a unique sequential number that you can enter in the program settings under the item "Contacts". For this, activate the suitable field with a mouse click. The assignment of a unique sequential receipt number corresponds to the accounting form regulations and makes it easier for you to find documents.



Creation of an incoming invoice

In order to now provide a new incoming invoice, click in the documents entry module on the  button and enter the information about "General document data", "Delivery address / Notes", "Invoice amounts" and "Payment" in the next window. A calendar is available for the entry of the invoice date and the due dates whereby you transmit the date simply by clicking on the suitable day. The note field is intended for your individual notes pertaining to individual invoices. Here you can therefore enter, for instance to which project the charged services are assigned.

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File Edit Receipts Print Print preview Windows Hilfe

Apply filter after search?

Receipt entry detail view [000007]

Miscellaneous
own fields
File attachments
Receipt assignment

Misc. receipt data

Processing no. 000007 Posting date 04/26/12 VAT rate % [reduced] 7
Receipt no. 45963 Receipt date 04/26/12 VAT rate % [full] 19

Supplier address / Notes

Supplier Supplier1 Notes
Address Supplier 1
789 Mainstreet
New York 12345 Comission: One family house

Invoice amounts

Net witho. VAT	0.00 \$	Gross witho. VAT	0.00 \$	reduced VAT	0.00 \$
Net reduced VAT	0.00 \$	Gross reduced VAT	0.00 \$	full VAT	2,940.72 \$
Net ful VAT	15,477.48 \$	Gross full VAT	18,418.20 \$	Sum VAT	2,940.72 \$
Sum Net	15,477.48 \$	Sum Gross	18,418.20 \$		

Terms

Discount date 00/00/00 Target dat. 00/00/00

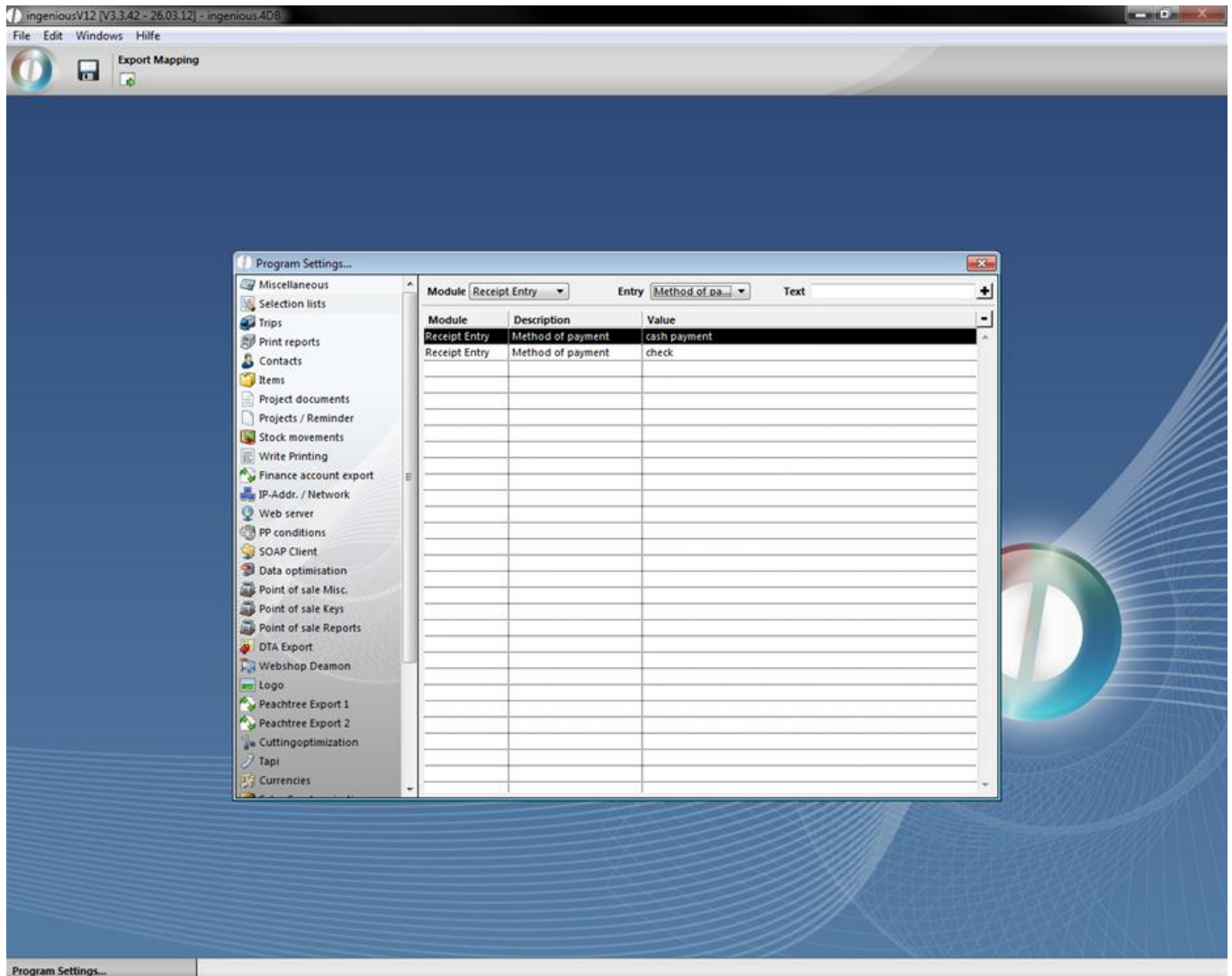
Payment


Dct. rate % 4.00 % Sum after dct. 17,681.47 \$ Abs. amt. dct. 736.73 \$
Payment 0.00 \$
Payment date 00/00/00 DTA Export on 00/00/00 DTA ☐ Exported
Meth. of payment check Status ☐ Finalised

Created 4/26/2012 14:19:13 - admin Modified 4/26/2012 14:19:13 - admin

Receipt Entry [000007]

You must enter the invoice amounts only in net and thus separate them according to value added tax, full or half a value added tax. Then Ingenious.V12 automatically calculates the value added tax and the gross amounts of the single sums and the total sum. With a Drop-Down menu, you can indicate how the invoice will be paid. You can set the options appearing here in the program settings under the menu "Selection lists" yourself.



In the "Receipt assignment" column, you have the possibility to assign the document to a certain project. A more precise explanation of this column subsequently follows. After you have entered the receipt, close the detail view by clicking on the  button. Now the document provided last is shown in the list view.

Receipt assignment

The column, "Document allocation" makes it possible for you to make a connection between input invoice documents and source invoice documents. Thus you know, for instance, in case of a customer complaint, from which retailer you have purchased the product. On the other hand, if a retailer must take back a product because of defectiveness again, you can see right away which customers have bought the article. The allocation of the suitable documents occurs in the workflow in the detail view of the invoice. Here you open the desired article in the "Items" column by double-clicking the items detail view.

The purchase prices are shown in color: if you posted inventory in the purchases column, prices are in green, when only parts are booked then prices are blue, and if there is nothing booked, prices are in red. According to the color of the lines, you can recognize in which module the receipt is entered (blue = workflow; yellow = purchase)

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408

File Edit Receipts Print Print preview Windows Hilfe

Apply filter after search?

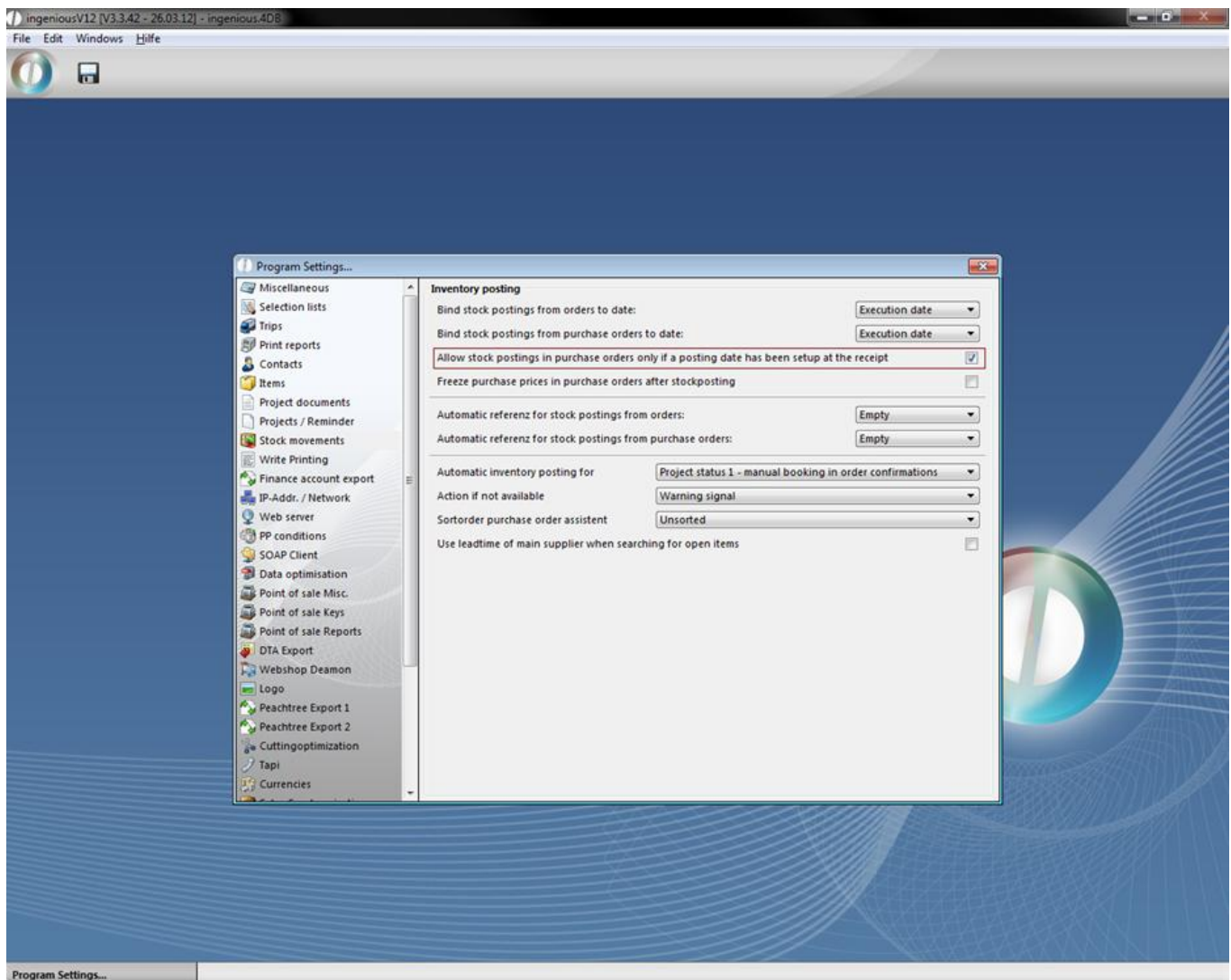
Receipt entry detail view [000007]

Project document	Document No.	Date	Item no.	Name	Item text	Item PP	Assigned
Purchase order	03142012/00009	4/2/2012	001	HV Blade no.3 16.5ft white	HV Blade no.3 16.5ft white	2,316.60	3/14/2012 - 16:21:26 - admin
Purchase order	04022012/00012	4/2/2012	001	HV Blade no.3 16.5ft ivory	HV Blade no.3 16.5ft ivory	2,316.60	
			002	Mini Felt (.270 x .260)	Guide Rail Mini Felt (.270 x .260)	20.00	4/26/2012 - 14:30:53 - admin
Invoice	04262012/00049	4/26/2012	001			0.80	4/26/2012 - 14:22:38 - admin

Receipt value: 15,477.48 \$ Purchase order value: 2,317.20 \$

Receipt Entry [000007] Purchasing [1 / 4 / 67]

For a better link of entry receipts and inventory postings, in the column "Inventory rotation" of the program settings it can be determined that inventory postings for orders are only possible, if an entry date shows on the receipt.



Collecting payments

In order to collect payments, you open the detailed view of the document and you enter the amount paid in the "Payment" area. You can insert the payment date with the calendar. Afterwards, close the detail by clicking on the cross in the window and secure the changes. Now the document is shown in green in the list view.

Printing documents

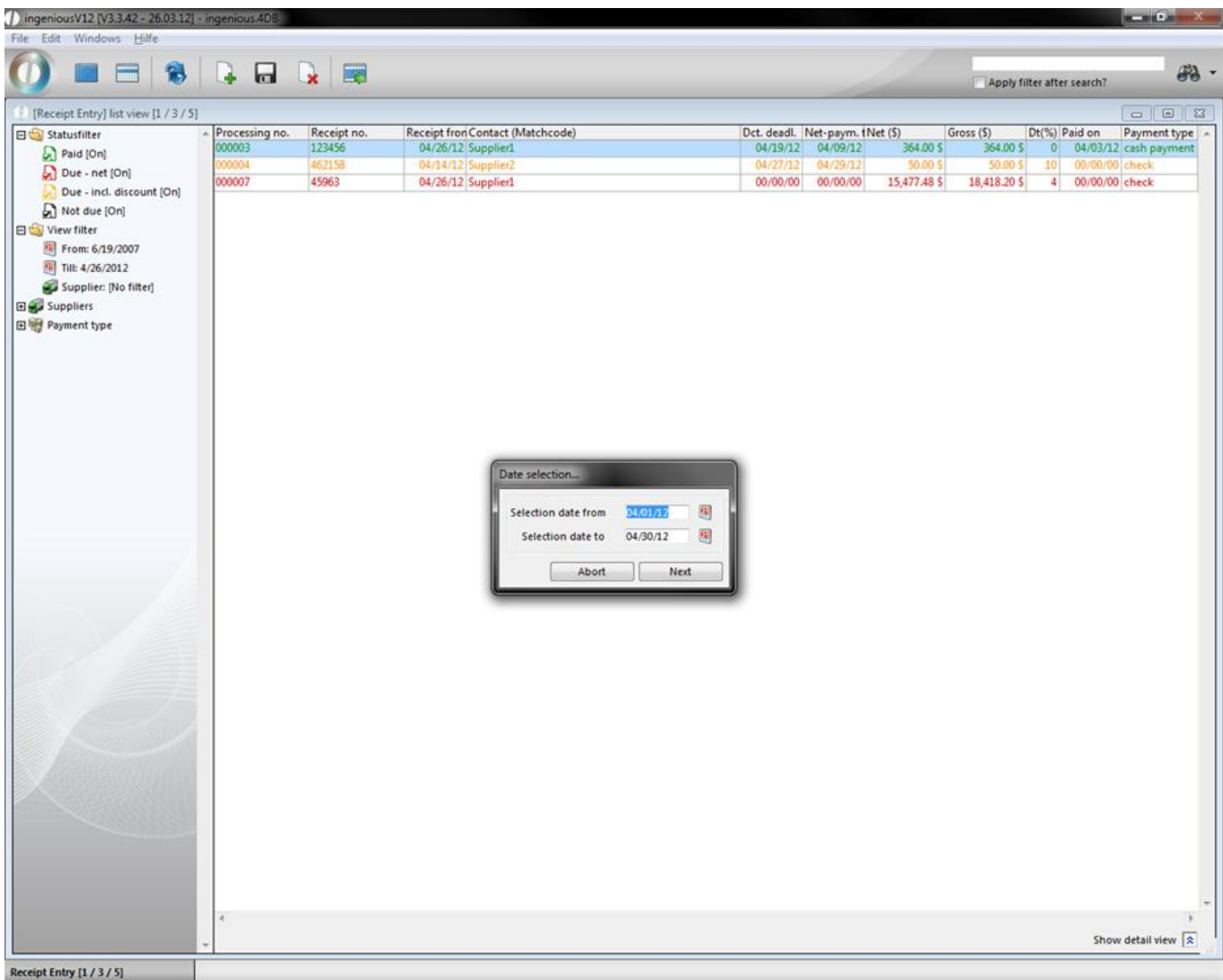
The "Incoming invoice ledger" and "Open item payables" were integrated into Ingenious.V12 for your documents, or for the transfer to the tax adviser or to your accounting. You select the menu item "Print" from the list view of the receipt entry module. Afterwards decide on the type of the desired report.

[Receipt Entry] list view [1 / 3 / 5]

Processing no.	Receipt no.	Receipt from Contact (Matchcode)	Dct. deadl.	Net-paym. t Net (\$)	Gross (\$)	Dt(%)	Paid on	Payment type
000003	123456	04/26/12 Supplier1	04/19/12	04/09/12 364.00 \$	364.00 \$	0	04/03/12	cash payment
000004	462158	04/14/12 Supplier2	04/27/12	04/29/12 50.00 \$	50.00 \$	10	00/00/00	check
000007	45963	04/26/12 Supplier1	00/00/00	00/00/00 15,477.48 \$	18,418.20 \$	4	00/00/00	check

Receipt Entry [1 / 3 / 5]

In the appearing dialog, you determine which selection should be transferred in the list. Afterwards you choose the time period for the report.



After confirming the print dialogs, you receive the report and can print this out on your standard printer.

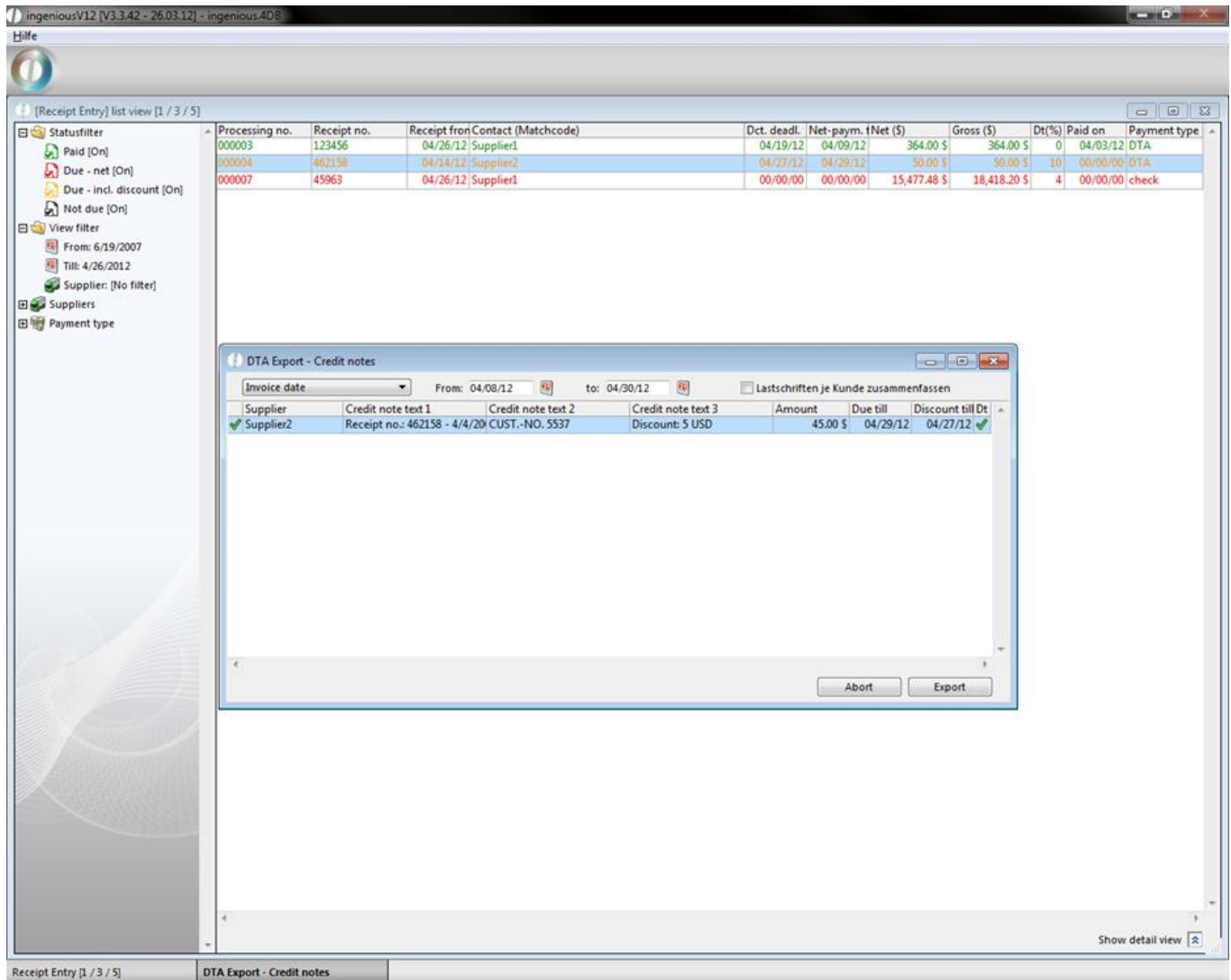
► Incoming invoice ledger
From 4/1/2012 till 4/30/2012

Item	Company	InvNo.	Rcpt. dat.	Dct. dat.	Target dat.	Net \$	VAT %	VAT \$	Gross \$	Dct. \$	After dct. \$	Paid on	Type
000003	Supplier1	123456	04/26/12	04/19/12	04/09/12	364.00	0.00	0.00	364.00	0.00	364.00	04/03/12	cash payment
000004	Supplier2	462158	04/14/12	04/27/12	04/29/12	50.00	0.00	0.00	50.00	10.00	45.00	00/00/00	check
000007	Supplier1	45963	04/26/12	00/00/00	00/00/00	15,477.48	19.00	2,940.72	18,418.20	4.00	17,681.47	00/00/00	check
						15,891.48 \$		2,940.72 \$	18,832.20 \$				

Report created with ingenious.net © Ingenious GmbH 2012 Page 1 4/26/2012

Exporting documents

The DTA export is a simple interface for the transmission of transfers from the Ingenious.V12 receipt entry in various banking programs. In order to make an export possible, the "DTA" option is entered next in the detail view of the document in the "Payment type" field. (If not available, add these in the program settings in the "Selection lists" column). You reach the DTA export with the "Receipts" menu. The export manager generates a list of all possible transfers and automatically enters the amounts and texts (receipt number and date, customer number or discount). In addition, you can also limit the selection of the displayed receipts with the data setting. The individual posts of the list are colored according to urgency, so that it is easy to recognize if a transfer is urgent (red) or if a discount (orange) is possible.



With only a few mouse clicks, you can select the desired transfers and transfer into the bank software. A time-consuming new setup does not apply here. If you click on the "Export" button, the Windows standard window opens and you can determine the desired export list. Then the document is exported as a .DTA file. Now in the receipt entry list view, the document is shown in green. If you open the detailed view of the document, you will see that in the DTA export, a checkmark is placed in the "Payments" area and also the export date was entered. The document will not be listed with a new export anymore.

ingeniousV12 [V3.3.42 - 26.03.12] - ingenious408

File Edit Receipts Print Print preview Windows Hilfe

Apply filter after search?

Receipt entry detail view [000004]

Miscellaneous
own fields
File attachments
Receipt assignment

Misc. receipt data

Processing no. 000004 Posting date 04/14/12 VAT rate % [reduced] 0
Receipt no. 102150 Receipt date 04/14/12 VAT rate % [full] 0

Supplier address / Notes

Supplier Supplier2 Notes
Address Supplier2
234 Park Avenue
Chicago 12345

Invoice amounts

Net witho. VAT	50.00 \$	Gross witho. VAT	50.00 \$	reduced VAT	0.00 \$
Net reduced VAT	0.00 \$	Gross reduced VAT	0.00 \$	full VAT	0.00 \$
Net ful VAT	0.00 \$	Gross full VAT	0.00 \$	Sum VAT	0.00 \$
Sum Net	50.00 \$	Sum Gross	50.00 \$		

Terms

Discount date 04/27/12 Target dat. 04/29/12

Payment

Dct. rate % 10.00 % Sum after dct. 45.00 \$ Abs. amt. dct. 5.00 \$
Payment 0.00 \$
Payment date 00/00/00 DTA Export on 00/00/00 DTA ☒ Exported
Meth. of payment DTA Status ☐ Finalised

Created 4/26/2012 14:07:02 - admin Modified 4/26/2012 14:36:37 - admin

Receipt Entry [000004]

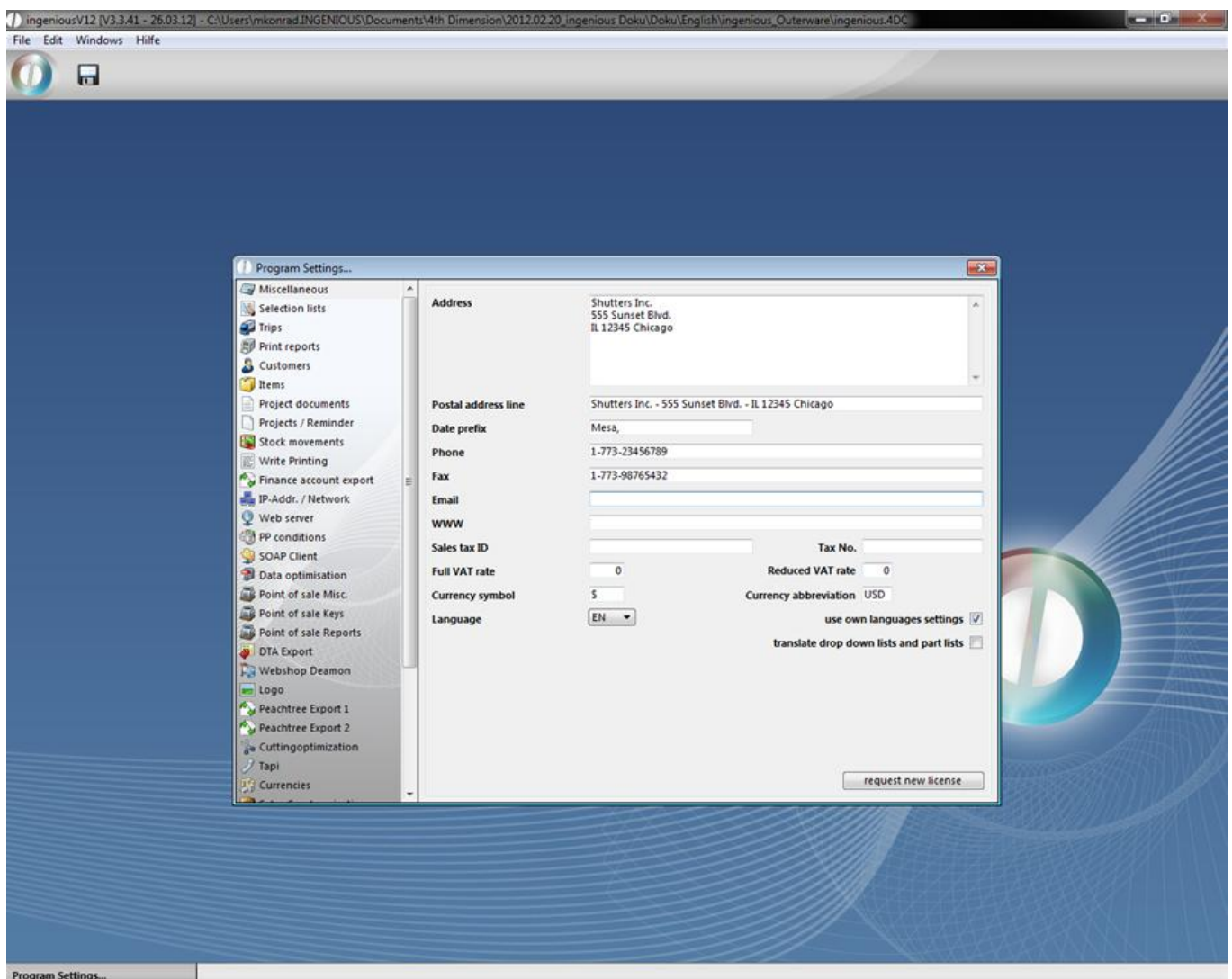
The "Free summary" export function does not need to be explained at this point again.

6 System modules

6.1 Program settings

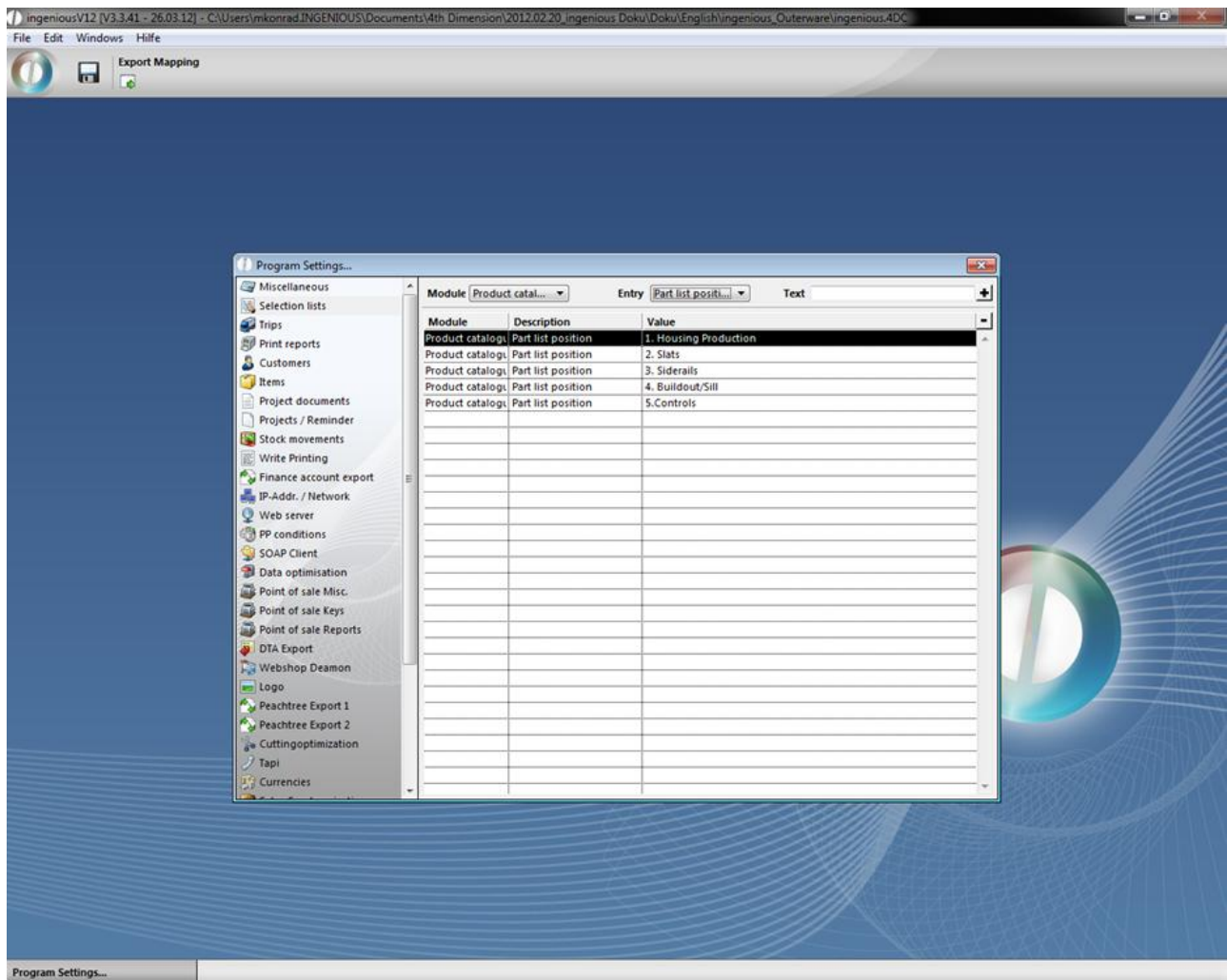
6.1.1 Miscellaneous program settings

In the database “Miscellaneous” you can determine your company address data, the date prefix, sales tax ID, tax number, sales tax rates, currency symbols, etc. These data will be automatically applied in the correct position in the project document (“Print/print project documents”). The fields, “Language” and “Use individual language adaptation” can only be changed as Admin. The final named domain is important for individual language adaptation in the “Localization” administration tool.



6.1.2 Selection lists

The “Selection lists” menu offers you the possibility to change pop-up menus that are available in ingenious.V12, or to supplement them with your own entries.

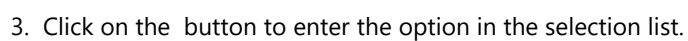


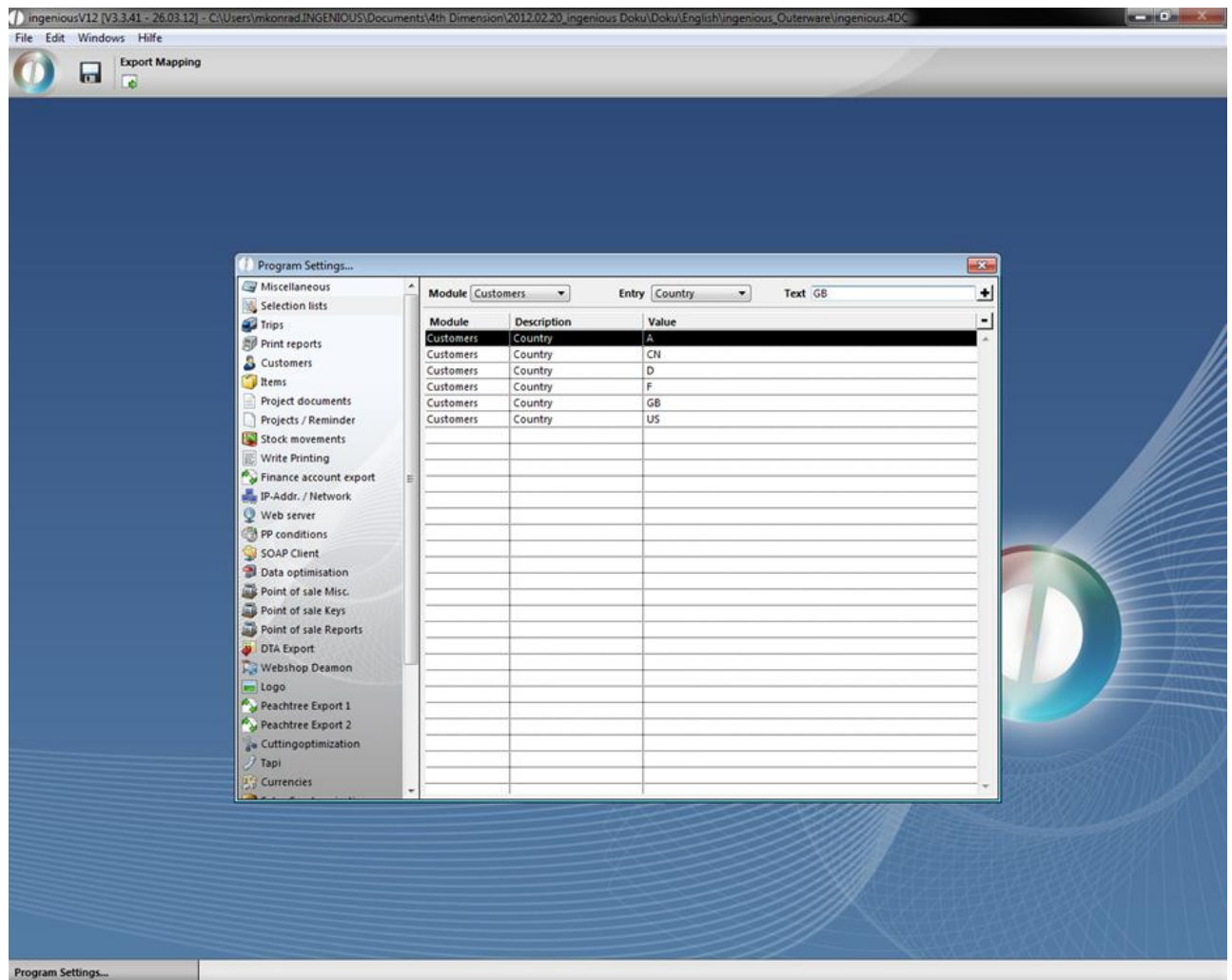
Sample view of the "Selection lists" menu.

To make a new entry in the selection list, you need the two top pop-up fields. An exercise follows to illustrate this:

Practice using selection lists

1. Select the "Customer" option in the "Module" field and in the second one, select "Entry" and the option "Country"
2. In the third field, enter the country code. In this example "GB" stands for Great Britain





4. Leave the program settings and save the changes. When you go to contacts, you can select Great Britain in the domain "Country".

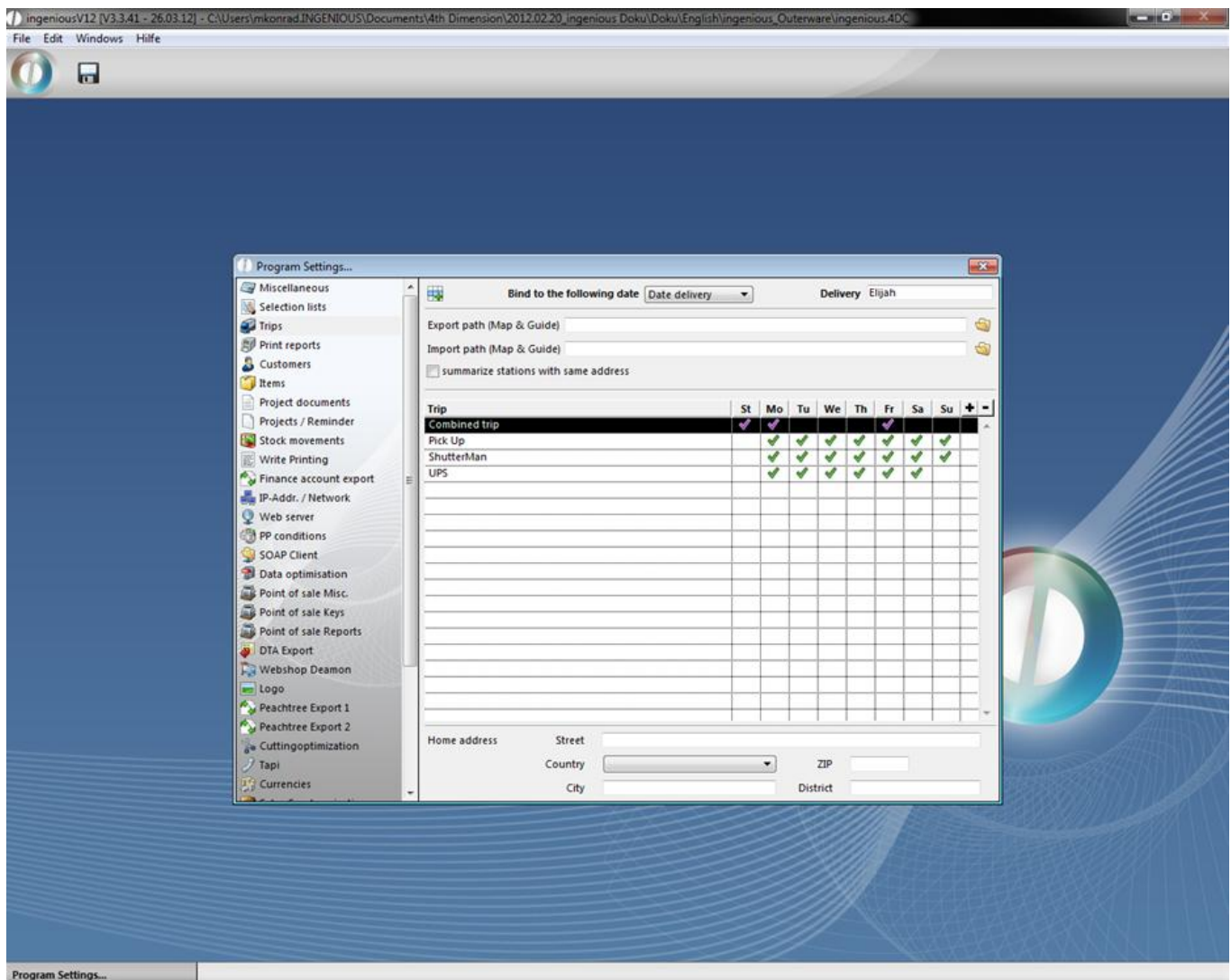
The screenshot displays the 'Contacts detail view' for a contact named 'Ingenious'. The interface is divided into several sections:

- Miscellaneous:** Includes fields for Matchcode (Ingenious), Customer number (15529), Contact type, Name, Forename, Title1, Company, Company2, Title2, Street (Beethovenstrasse 14), Country (USA), State, ZIP (04107), City (Leipzig), District, Contact person, Salutation (Dear Mr. & Mrs.), and Birthday (00/00/00).
- Communication:** Includes Phone (+49 341 226210), Fax (+49 341 2262120), Email, and WWW (www.ingenioususa.com).
- Notes:** Includes a PinUp note (Central office in germany) and a checkbox for 'Show notes in project'.
- User defined List:** A table with columns 'Name' and 'Value'. It contains one entry: 'Ingenious'.

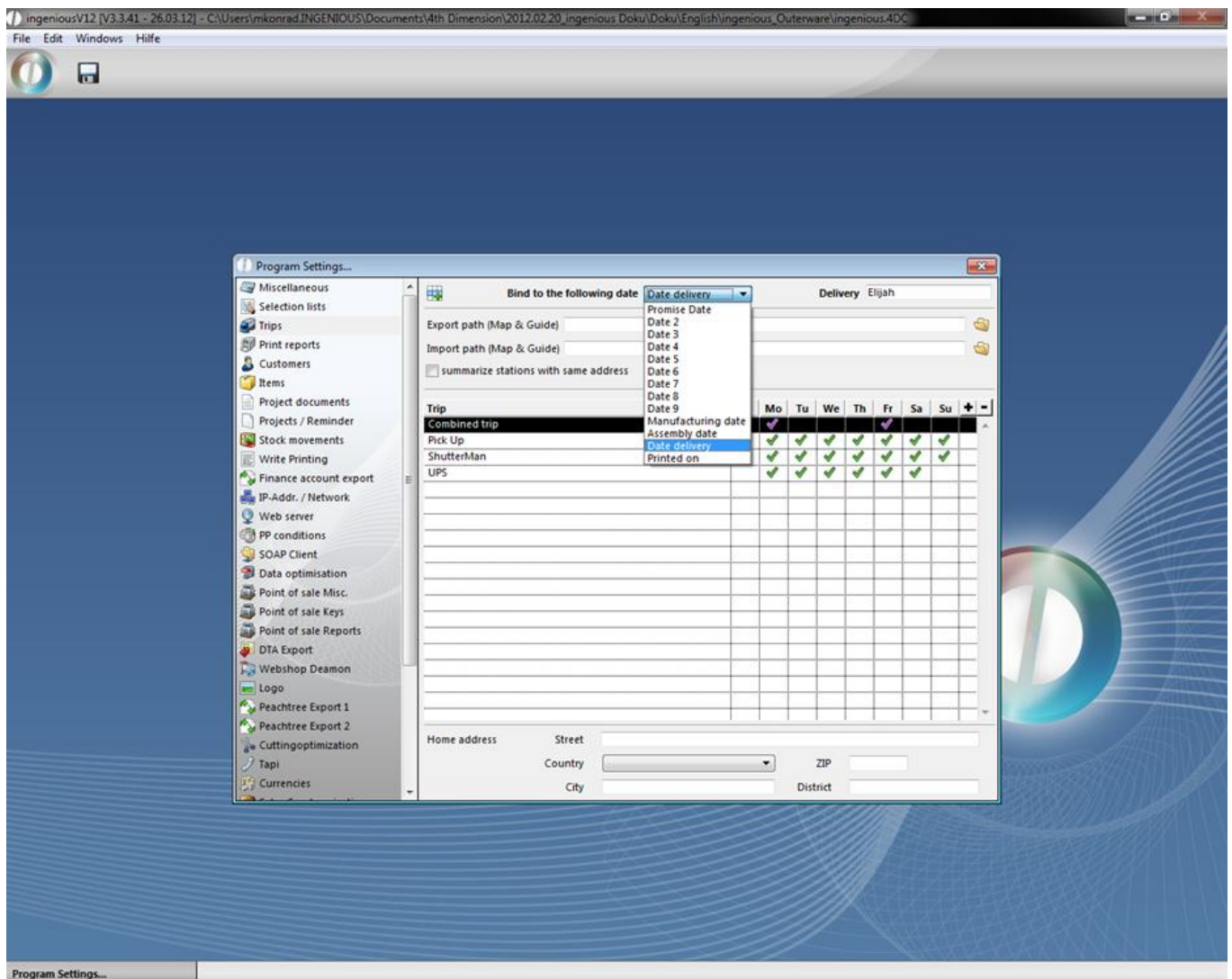
The bottom of the window shows the 'Created' date (4/25/2007 15:50:57 - jaegeer) and the 'Modified' date (4/23/2012 11:55:02 - admin).



6.1.3 Trips

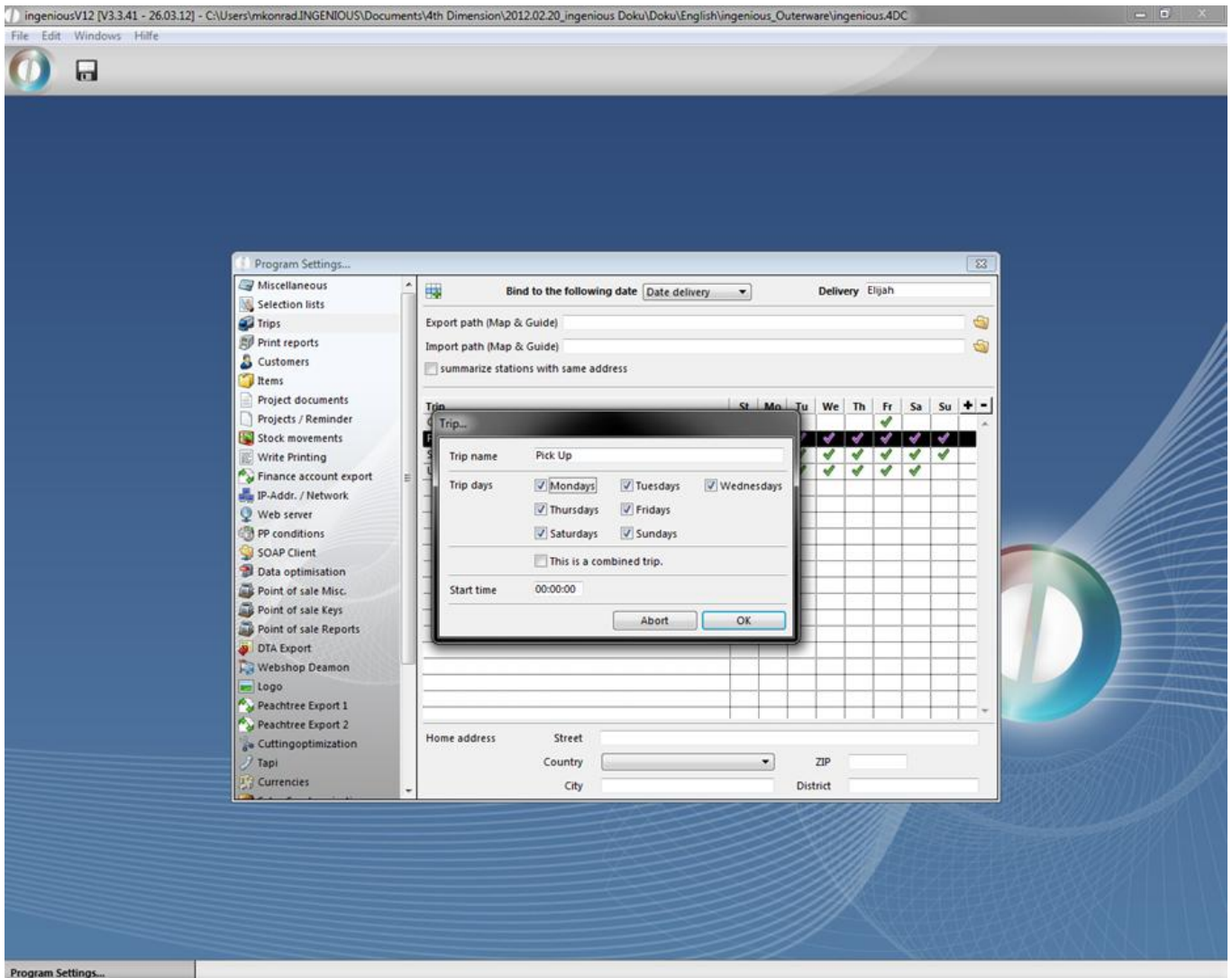
The "Trips" menu offers you the possibility to create diverse trips and to determine on which day of the week they should occur.



In the upper list field, you can determine the desired trip appointment connection. Here you access the available appointment times in the column "Times" from the "Workflow" module.




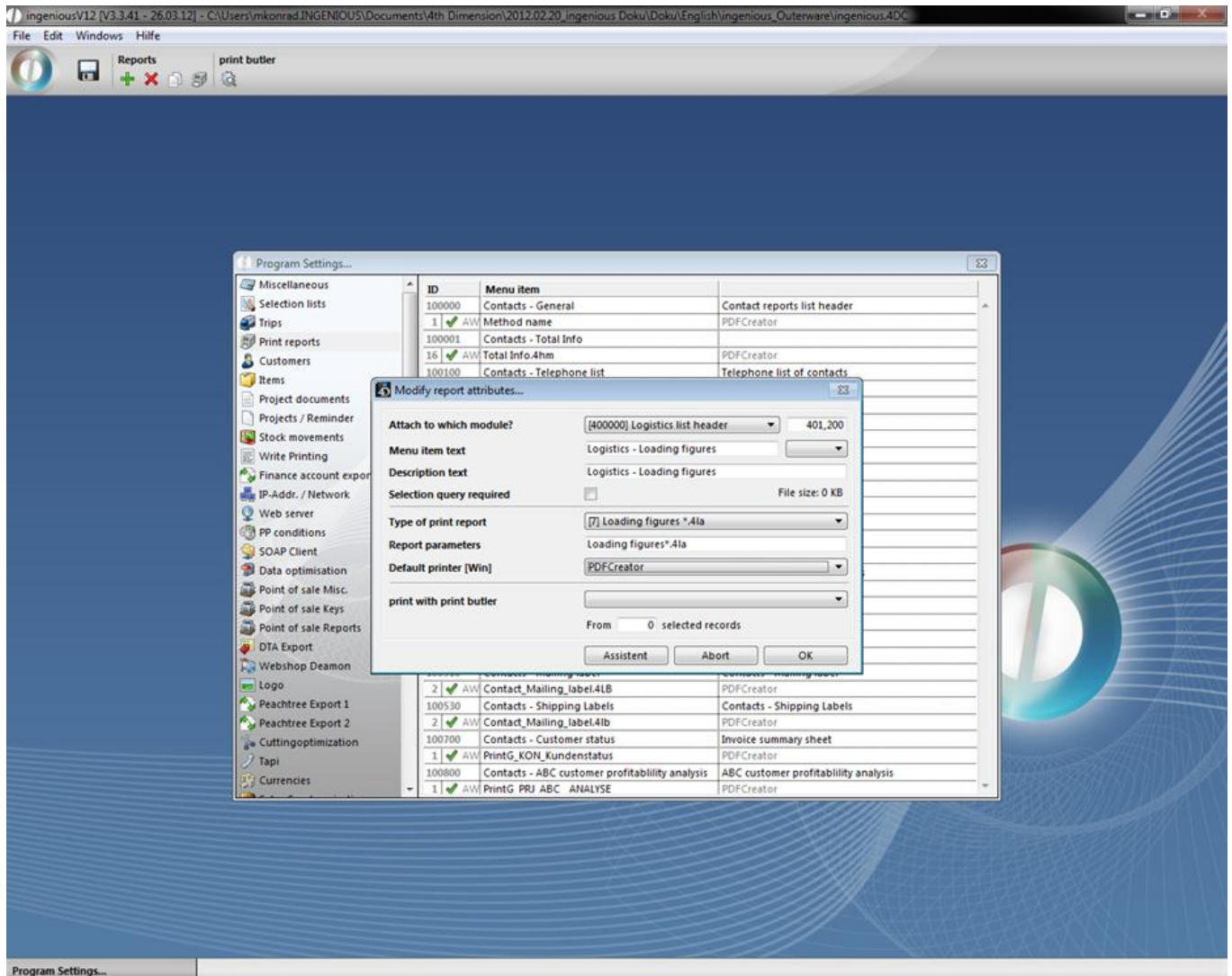
With the  button, you can create a new trip and determine its name and the day on which it will occur in the window that appears. You can also determine if there should be a collective trip. With  a route can be deleted.



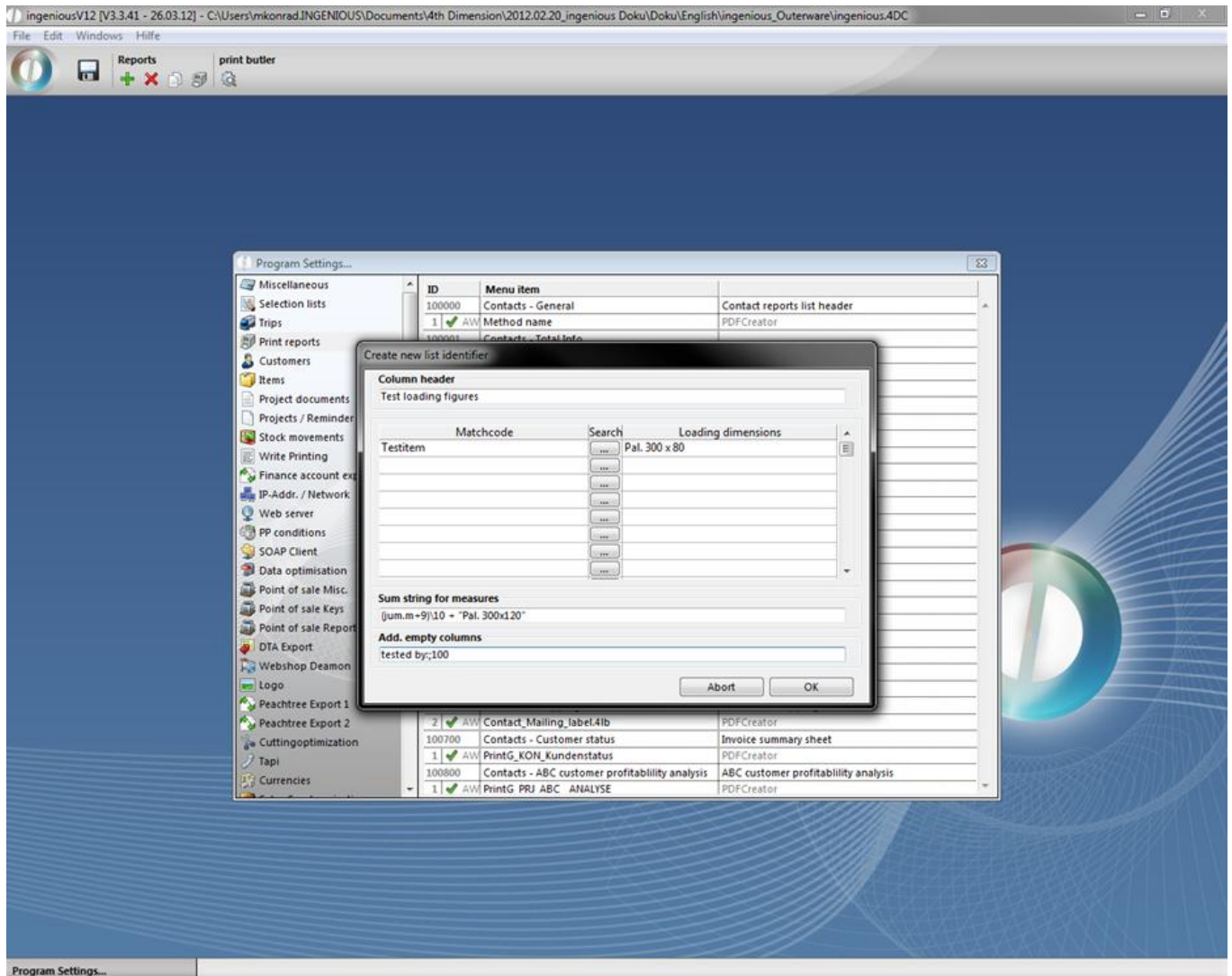
When you create a new project, in the column "Miscellaneous" in the field "Trip" and/or "Collective trip", you determine to which route the project should be linked. If the project will be forwarded later, appointment times can be changed in the column "Times". Central management of collective trips is also possible.

Trip Management Assistant

The Trip Management Assistant is a function of Ingenious.V12 that helps you configure a trip list and/or a freight list in which certain goods with amount, measurements and weight can be recorded. With this list, you can optimize the loading of your vehicles. Create a new report with the  button. In the "Module" field, select the option "Logistics list header", and complete the remaining fields shown in the following image.



Subsequently with the "Assistant" button, you can open the trip management assistant. With the "Export script to the file" and "Import script from the file" buttons, you have the possibility to export or import trip lists. Click on to create a new list identifier. A new window opens in which you enter the column headline. In the column "Matchcode" you either enter the article matchcode or you click on the button and select from the catalog by double-clicking the desired article. In the "Loading dimensions" column, enter the needed loading surface. In the "Sum string for measures" field, you can quote how the loading measurements should be calculated and exported. For the calculation of the sum string, all formulas used in Ingenious.V12 are at your disposition. The instructions for the article are compiled in the capacity list in the columns "Article", "Weight" and "Measurement". You have the possibility to add other blank columns. In the last field, you enter the column title and then the column width in pixels, separated by a semicolon. In this way, you can add a discretionary number of blank columns.



In the pictured example, shutter casings of synthetic material are loaded on pallets

(300 x 80 cm). The vehicle is always loaded with transport pallets. Ten shutter casing pallets fit on a transport pallet of 300 x 120 cm. That is why $(\text{jum.m}+9)\backslash 10$ "Pal. 300 x 120" is always in the sum string. One calculates the number of the synthetic roller shutter casings plus 9, getting the integer (without remainder) divided by 10. In this manner, one gets the rounded number of the transport pallets. The content in quotes will be displayed in a normal text. That means if four shutter casings should be loaded, one calculates $4+9=13$ and $13:10=$, remainder 3. The remainder will not be applied. Therefore, one transport pallet is needed. By simplifying the example and assuming that 10 pallets fit on one pallet and 12 pallets need to be transported, then two vehicles are needed, for $12+9=21$ and $21: 10=2$, remainder 1.

When all settings are in place and confirmed, the column headline is displayed in the trip management assistant. In case you would like to work on your entries, double click on the headline and you will get the editing window. Exit the assistant and the program settings and save the settings. In the user administration, activate the appropriate report rights. Now a loading capacity list will be displayed in the workflow modules. Now go to the menu and click "Print" for the list.

The screenshot shows the ingenious.V12 software interface. On the left, a sidebar contains a menu with various options. The 'Logistics - Loading figures' option is highlighted. The main window displays a table with the following columns: Customer, Telephone, Gross \$, Open \$, and Paifin, arc R1, R2, R3. The table lists various customers and their associated financial data.

Customer	Telephone	Gross \$	Open \$	Paifin, arc R1, R2, R3
Peter Pahn USA-		6.61 \$	6.61 \$	
Peter Lustig USA-		9.45 \$	9.45 \$	
Peter Lustig USA-		51.85 \$	51.85 \$	
Peter Pahn USA-		36.29 \$	36.29 \$	
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$...	
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$	
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$	
Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$	
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$	
White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	0.00 \$	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$...	
Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$...	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$...	
Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$	
The Awnning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$	
Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$	
Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$	
Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$	
Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$	

When you select the function "Logistics - Loading figures", and select the desired options in the print setting window, the "Select trip..." window will open.

Here you first select the trip for which a list has to be created (in this case route 2). In the "Print" field, you can determine which project documents have to be considered. You also can determine the time period that has to be calculated. You also have the possibility to sort the specifications according to the client, manufacturing date or delivery sequence. When you have made all the adjustments, click on the "Next" button. The window "Loading figures" in which all addresses of clients who will receive the articles determined by you in the selected trip will open. You can print the loading figures list by clicking on the "File/Print" menu or with the button.

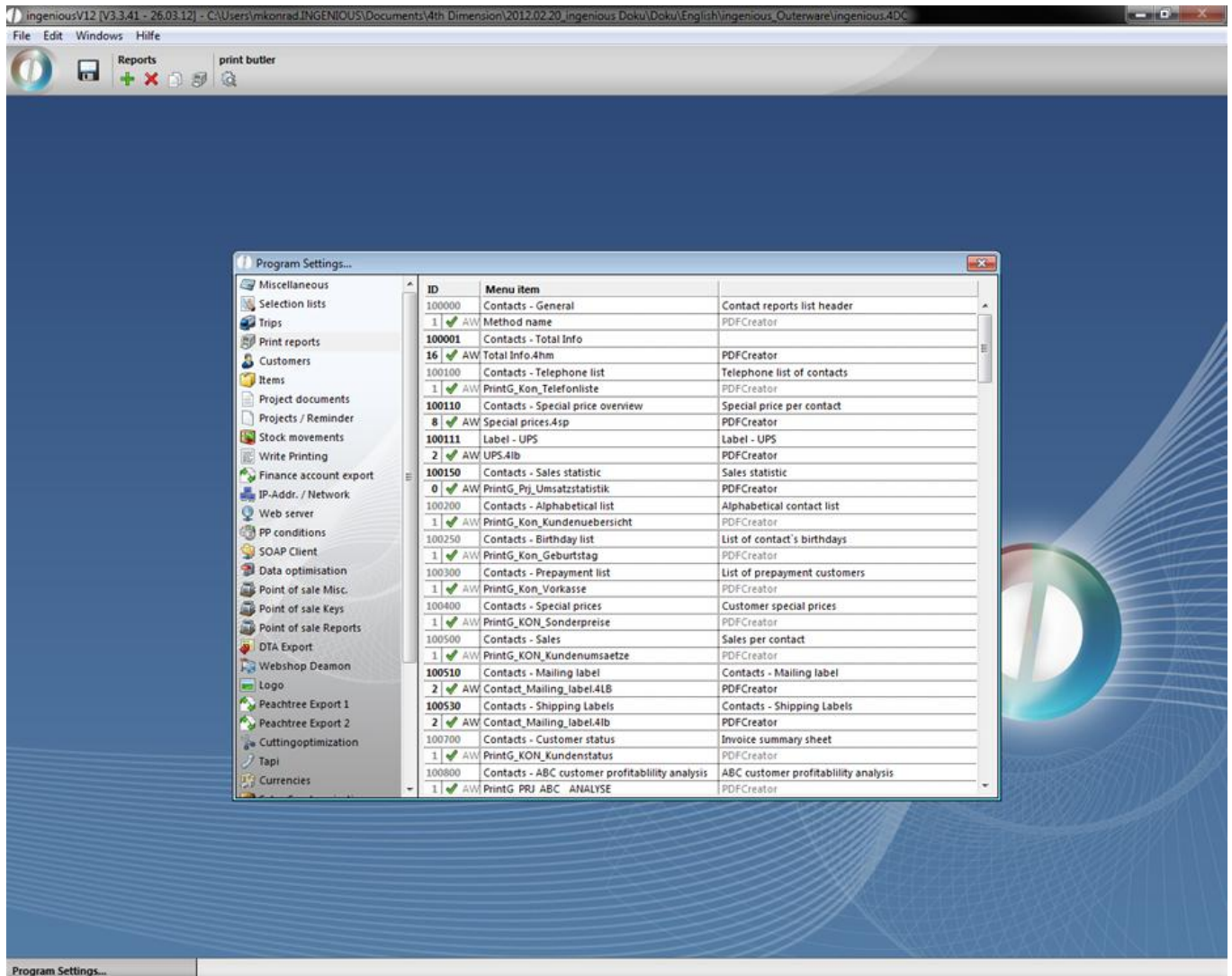
The screenshot shows the 'Loading figures' window in the ingenious.V12 software. The window has a menu bar (File, Edit, View, Insert, Style, Tools, Database) and a toolbar. A search bar with the text 'Apply filter after search?' is located in the top right. The main area contains a table with the following data:

Customer	Address	loading sequen	Pce	Wt(kg)	Measures(max)	tested by:
1 Pick Up - Period starting on 5/3/2012 bis 5/4/2012						
2						
3 Change trip sequence						
4 Test loading figures						
Customer	Address	Loading seq	Pce	Wt(kg)	Measures(max)	tested by:
6 Ingenious	Beethovenstrasse 14					
7 05032012/00074	04107 Leipzig		300.00	0.00	Pal.300x80	
8						
9	Trip sums:		300.00	0.00	30Pal. 300x120	
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						
35						
36						
37						
38						
39						
40						
41						
42						

The status bar at the bottom shows 'Program Settings...' and '2 Projects [1 / 1 / 67]'.


6.1.4 Print reports

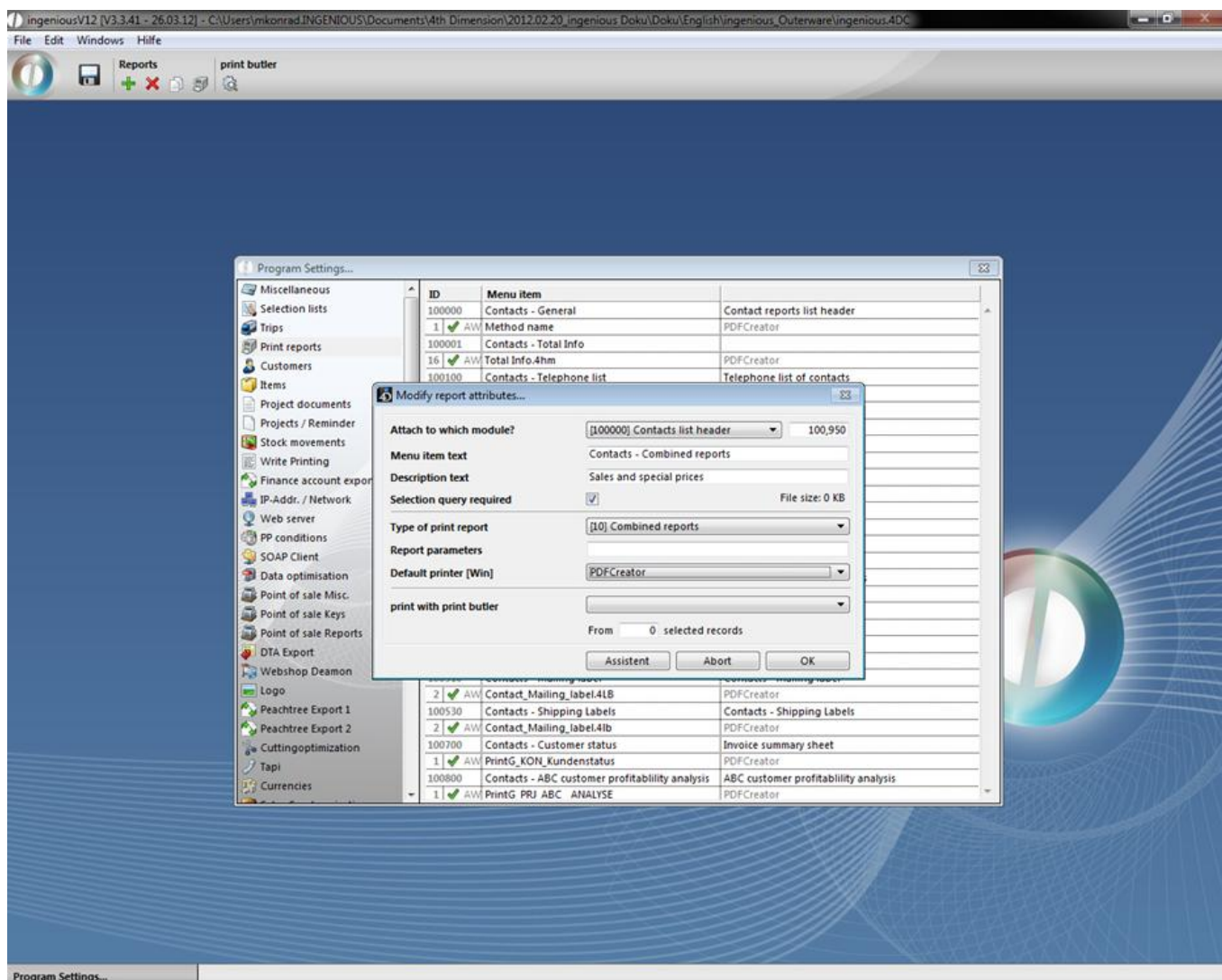
In the field "Print reports" you will find all print lists from Ingenious.V12.



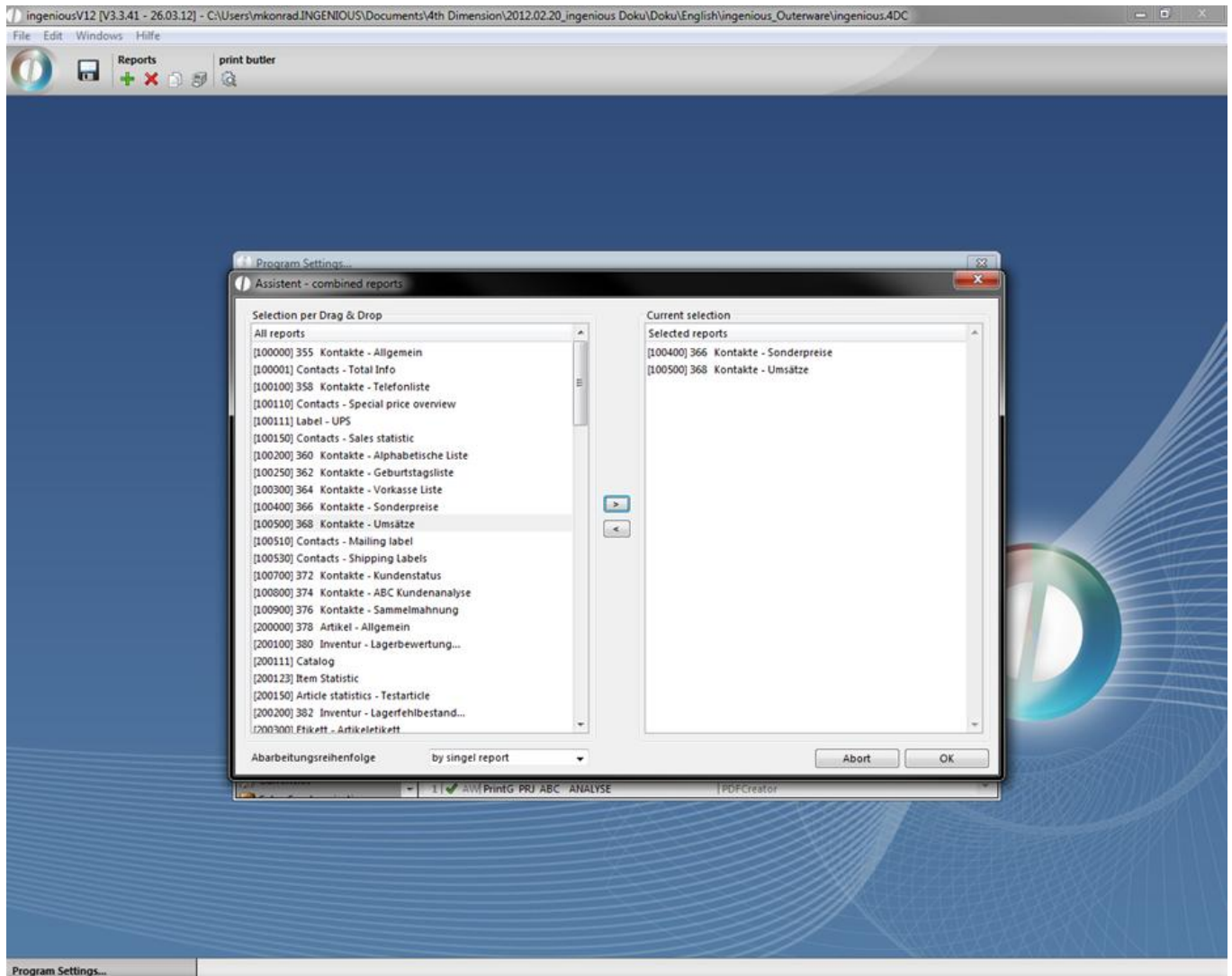
You can add new ones or you can change existing lists according to your needs, but this is not recommended without the necessary experience. We are presenting you with another print report as follows:

Combined report

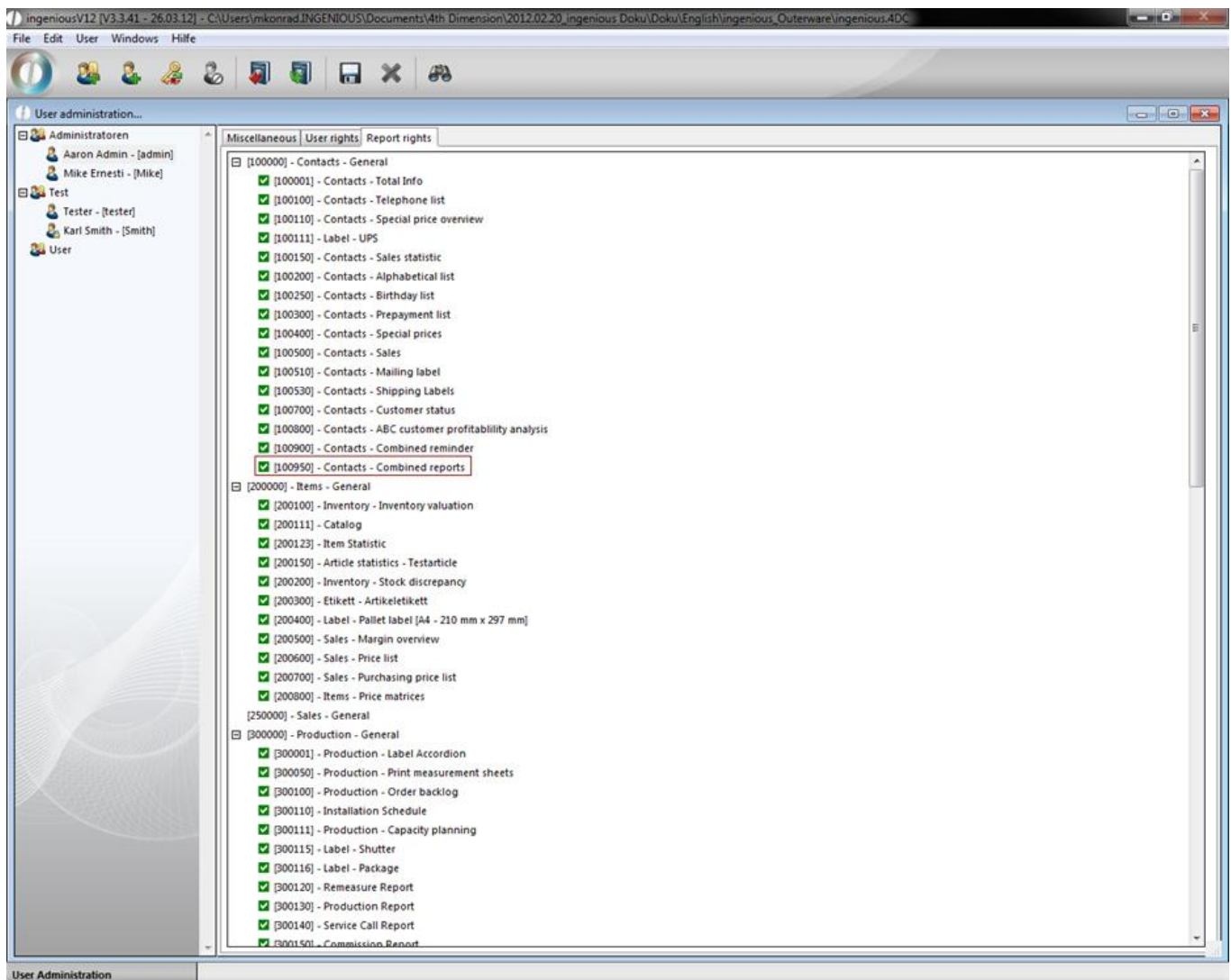
With the help of the "Combined report" you can compile different print reports. You have the possibility to print diverse production documents (labels, documents, etc.) at the same time, or print one document simultaneously on more than one printer. Create a new print report by clicking on the  icon. The window "Modify report attributes" opens where you can carry out the desired settings. The following example will illustrate the collective print report for the "Contacts" module that prints sales volumes and sales prices simultaneously.



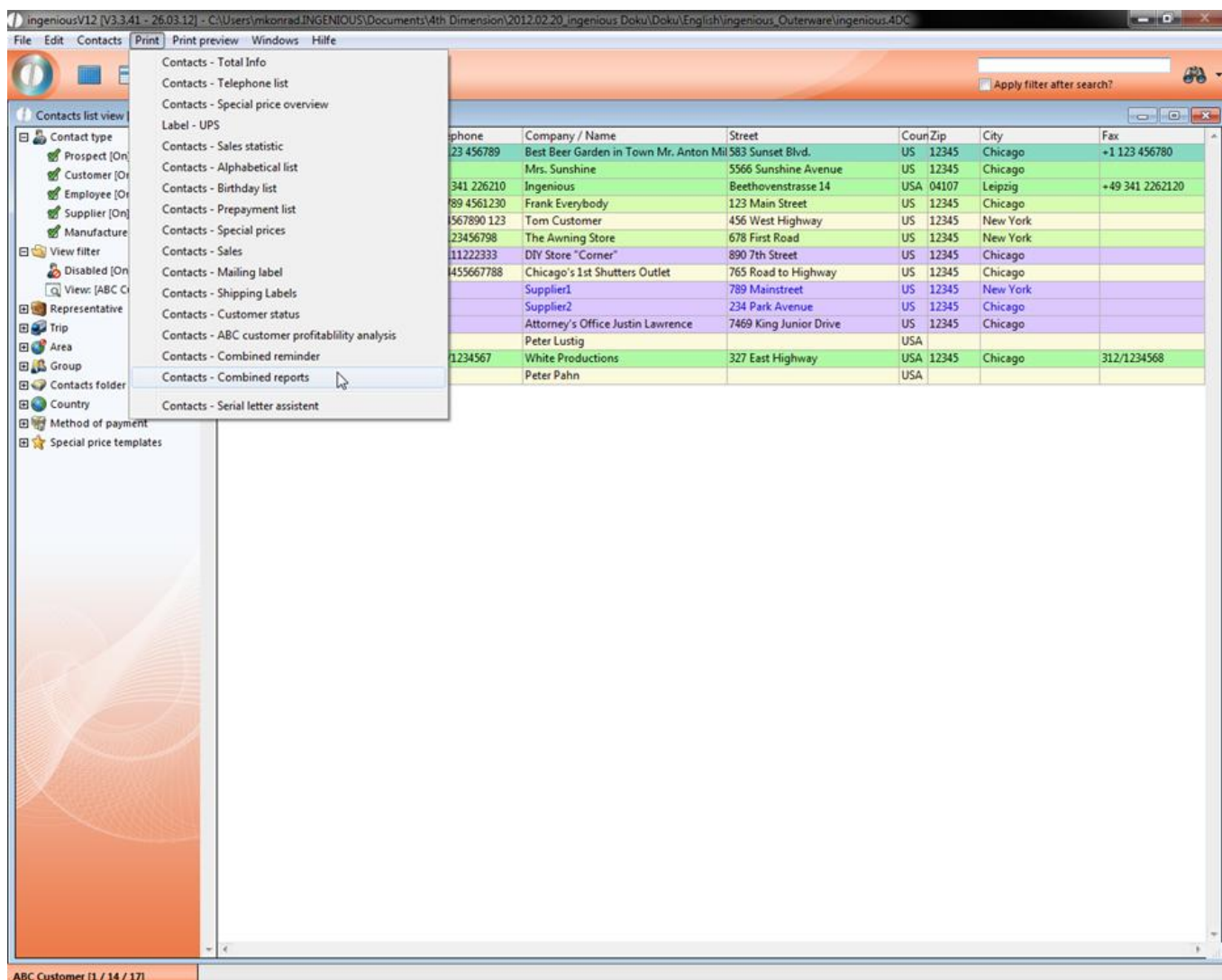
For the print report option, you select "[10] Collective print report". The field "Report parameter" remains blank. In the field "Default printer" you can determine on which printer the reports will be printed. If the reports have their own print specifications, they will be printed on the printer model specified for the report. When all specifications are made, click on the "Assistant" button. A new window opens, where you can Drag & Drop the desired reports to the right field of the window and confirm your selection by clicking "OK".



Close the report window also by clicking "OK". You are now looking at the newly created report. Exit the program settings and save the settings. In order to be able to use the printed report, the appropriate report rights must be cleared with the user administration.



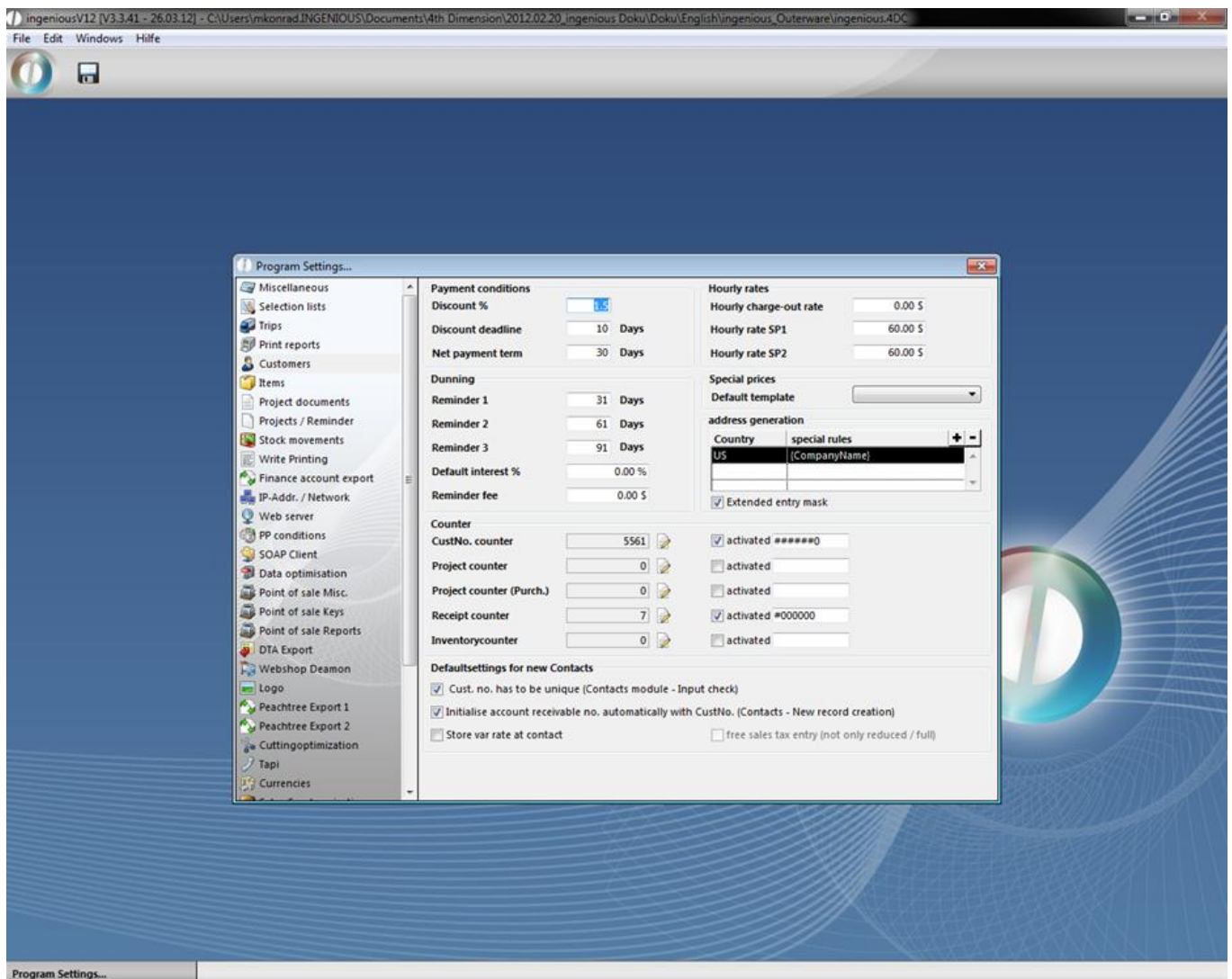
In the "Contacts" module, you will find the report created by you in the "Print" menu.




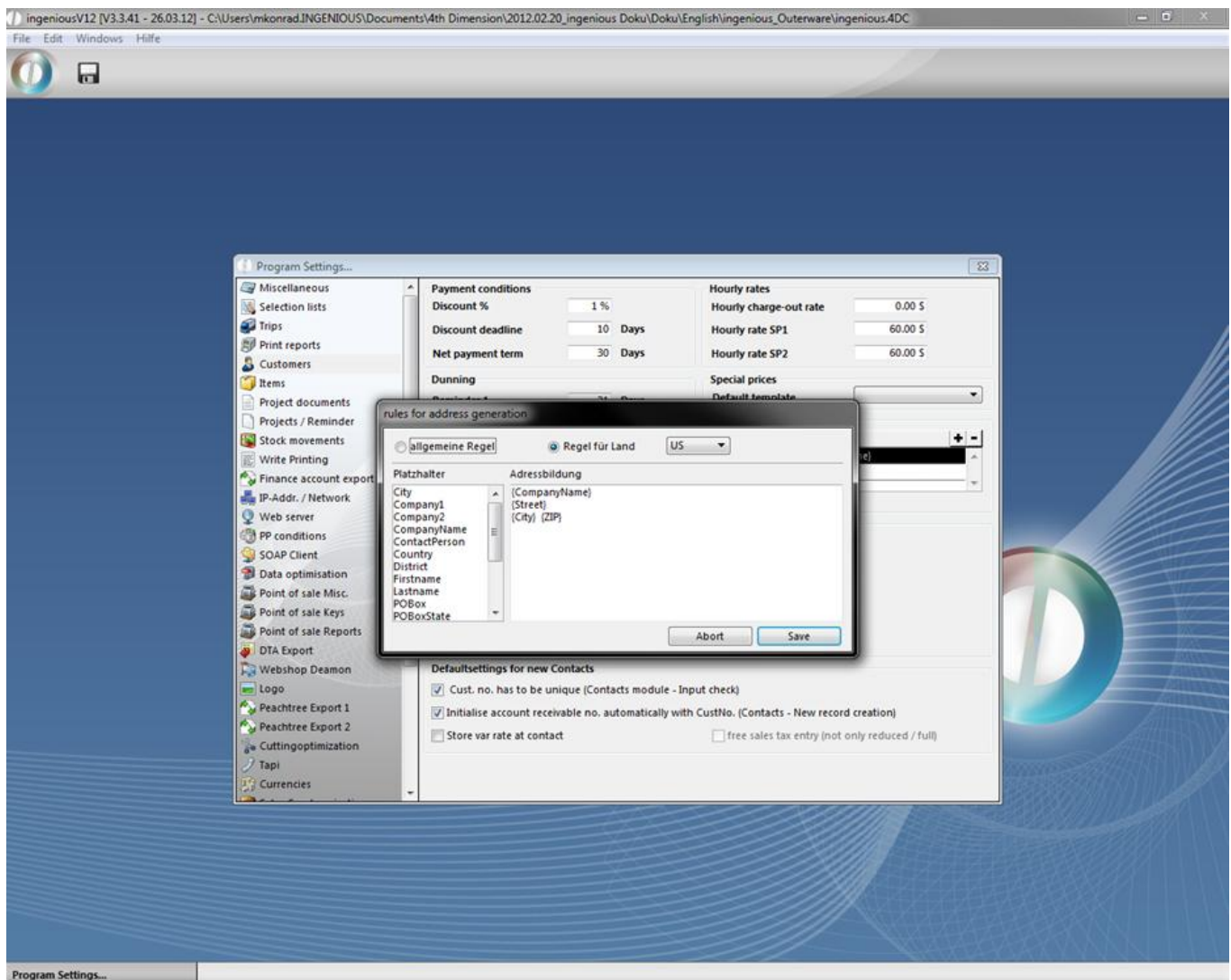
If you need additional printing lists, or if you want to change some lists, please contact Ingenious GmbH. We certainly can help you.

6.1.5 Contacts

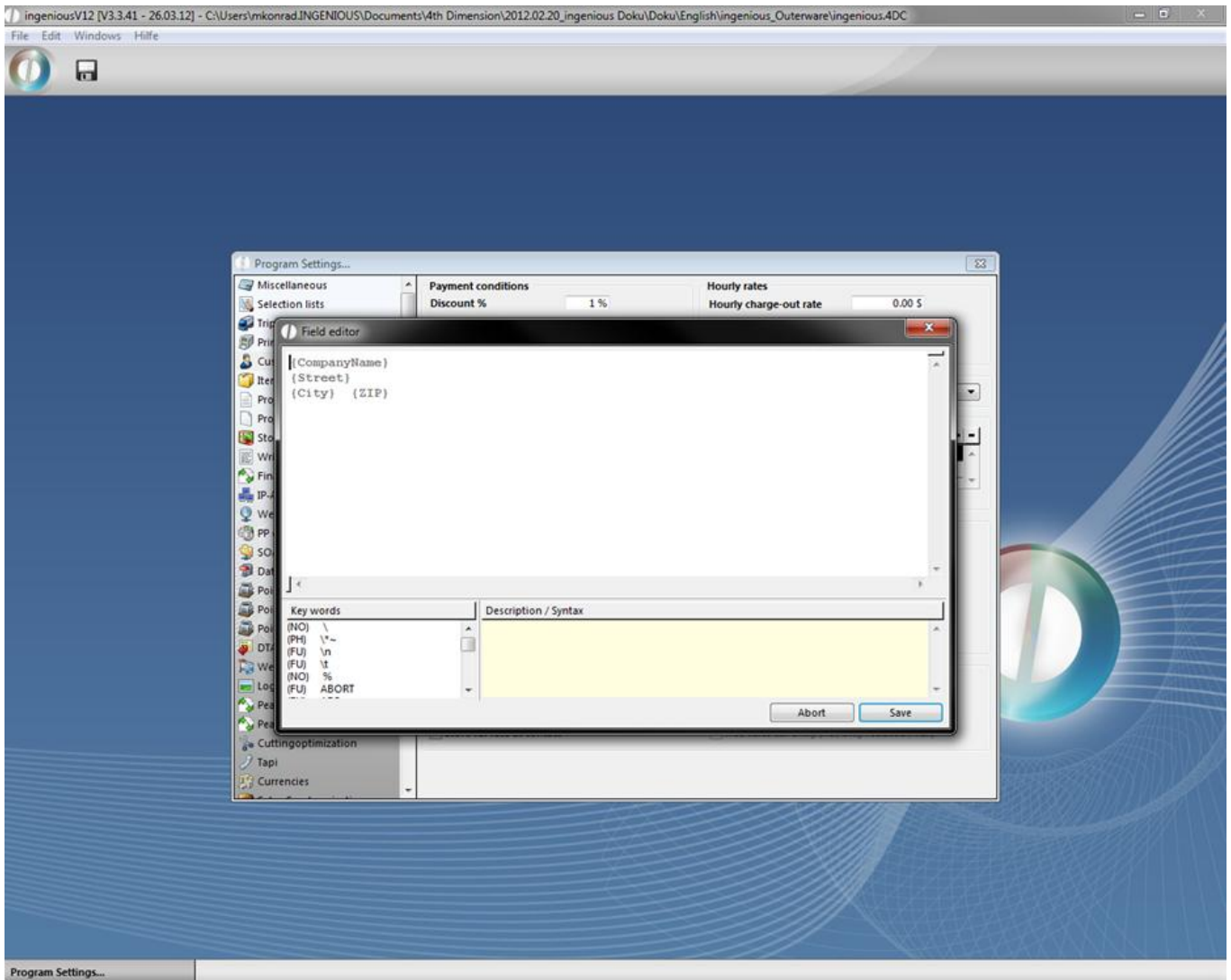
In the "Contacts" field, define the standard settings, which every client receives with a new installation. Individual changes can be made later for each contact.



Here you can establish the default settings for payment conditions, hourly rates and reminders. The field "address generation" gives you the possibility to consider characteristics that are specific for each country. With the  button, new address generation can be made. In the opening window, the respective country will be selected and the required address data is pulled into the right window using Drag & Drop.



With the help of the field editor (↑ + F2) the address line can be formatted appropriately.



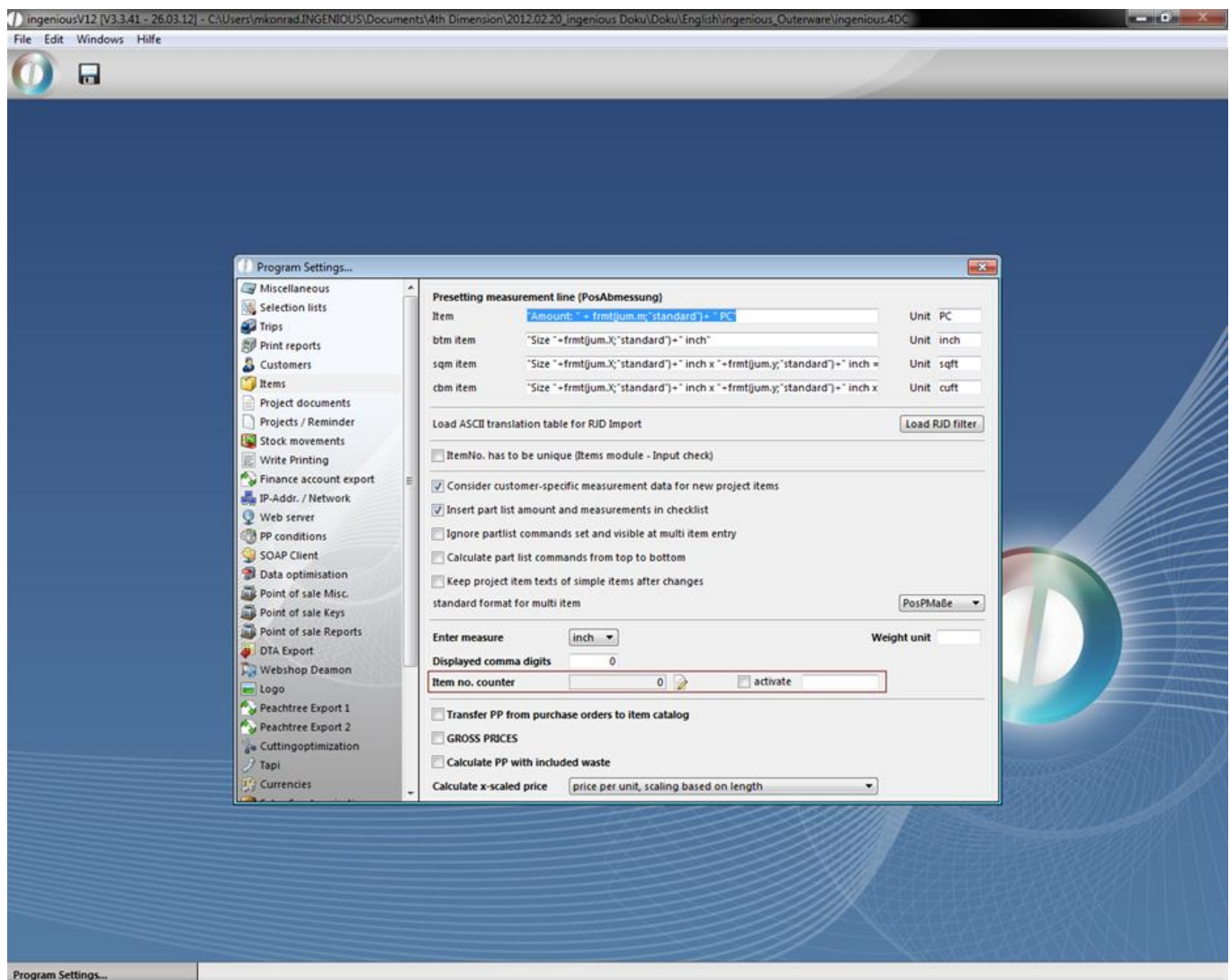
In the "Counter" field for example, you can activate the client counter and establish a level where the counter automatically counts. Should a client be deleted, the counter can be reset.


In case the numbers of the clients are remitted manually, it would be helpful to activate the option "Client number must be non-recurring". In this way, you can avoid a double entry. Activation of the option "Automatically initialize the proceeds account number with the client number" is helpful when the client number and the debtor account numbers are linked in order to avoid a double entry.

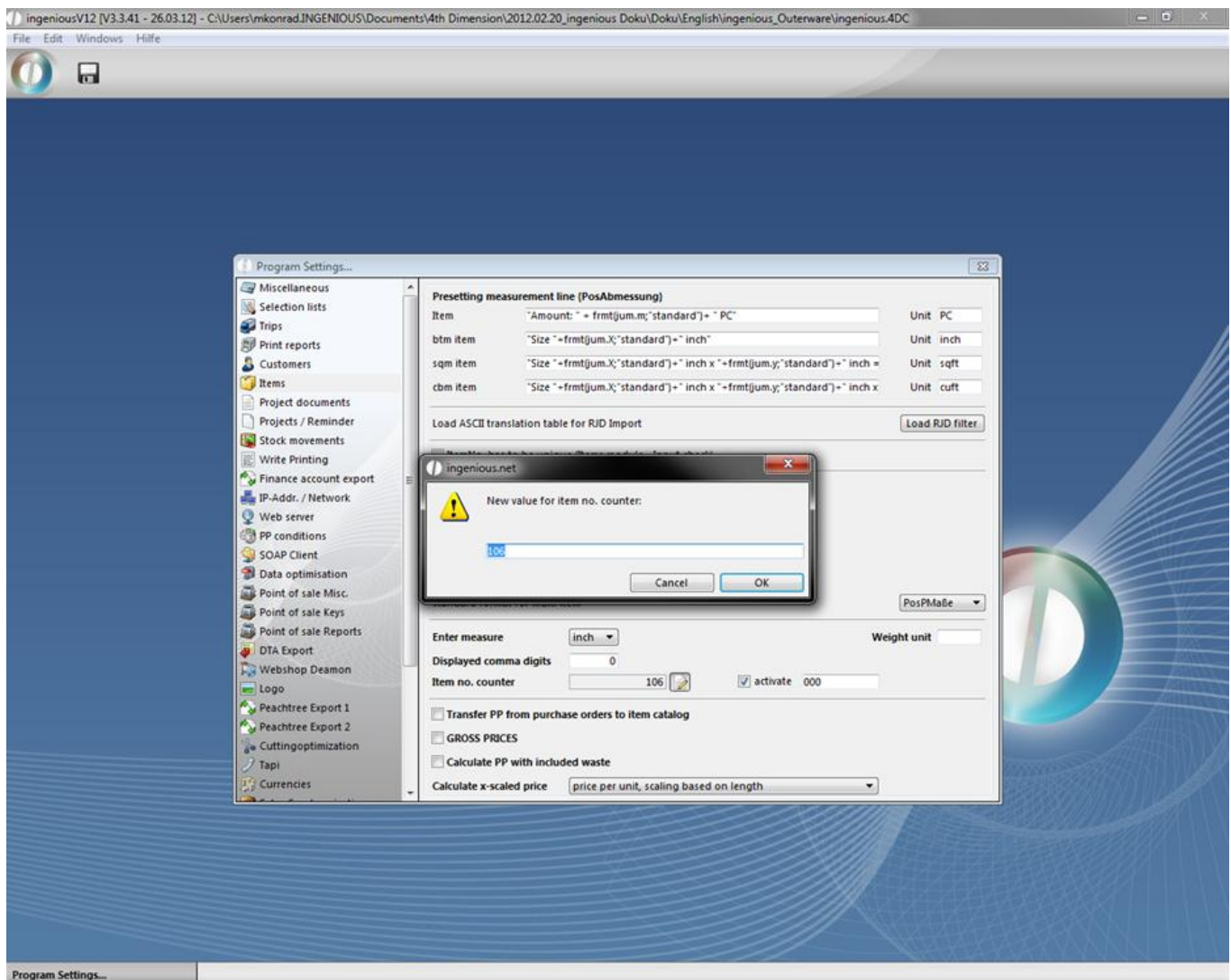
6.1.6 Items settings

In the "Items" area, you will find the formulas for the default settings for the measurement line of the individual positions. Here changes are also possible. In the field "Printing lists" this is not recommended if you don't have enough background knowledge. Contact Ingenious GmbH if you would like to make changes. Furthermore, you can determine whether client-specific measurement data need to be considered and whether the client number must be non-recurring. In the field "Enter unit measure", determine all the articles in Ingenious.V12 by a unit millimeter, centimeter or inch. This determination confirms the entry and calculation type of the article values. In case you made a change, it will be accepted when you close Ingenious.V12 and then you can restart it. The same applies for the entry of the weight unit. A conversion of optional unit measures for an article is possible in the detailed article display in the field, "Measurement line". Activate the field "GROSS PRICES" and prices including sales tax will be displayed. A checkmark in the field "Calculate PP including waste", indicates that cut will be considered in the purchase price. The button "Load RJD filter" activates a filter for the conversion of umlauts. This filter can be obtained from us if necessary.

If you want to let item numbers be created automatically then check the field "Item no. counter".

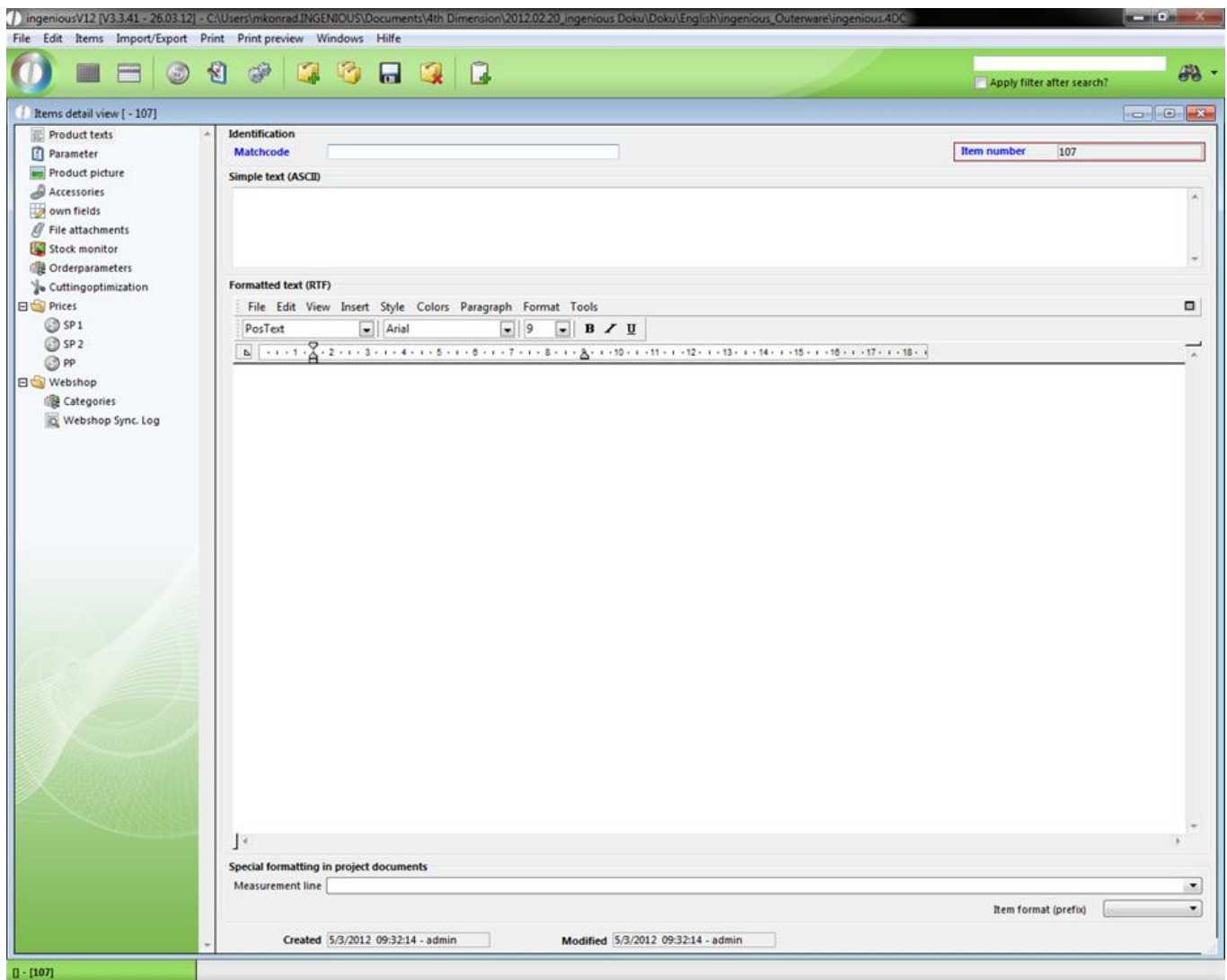


After a click on the icon  you can define the start value of the item numbers, for instance 106:



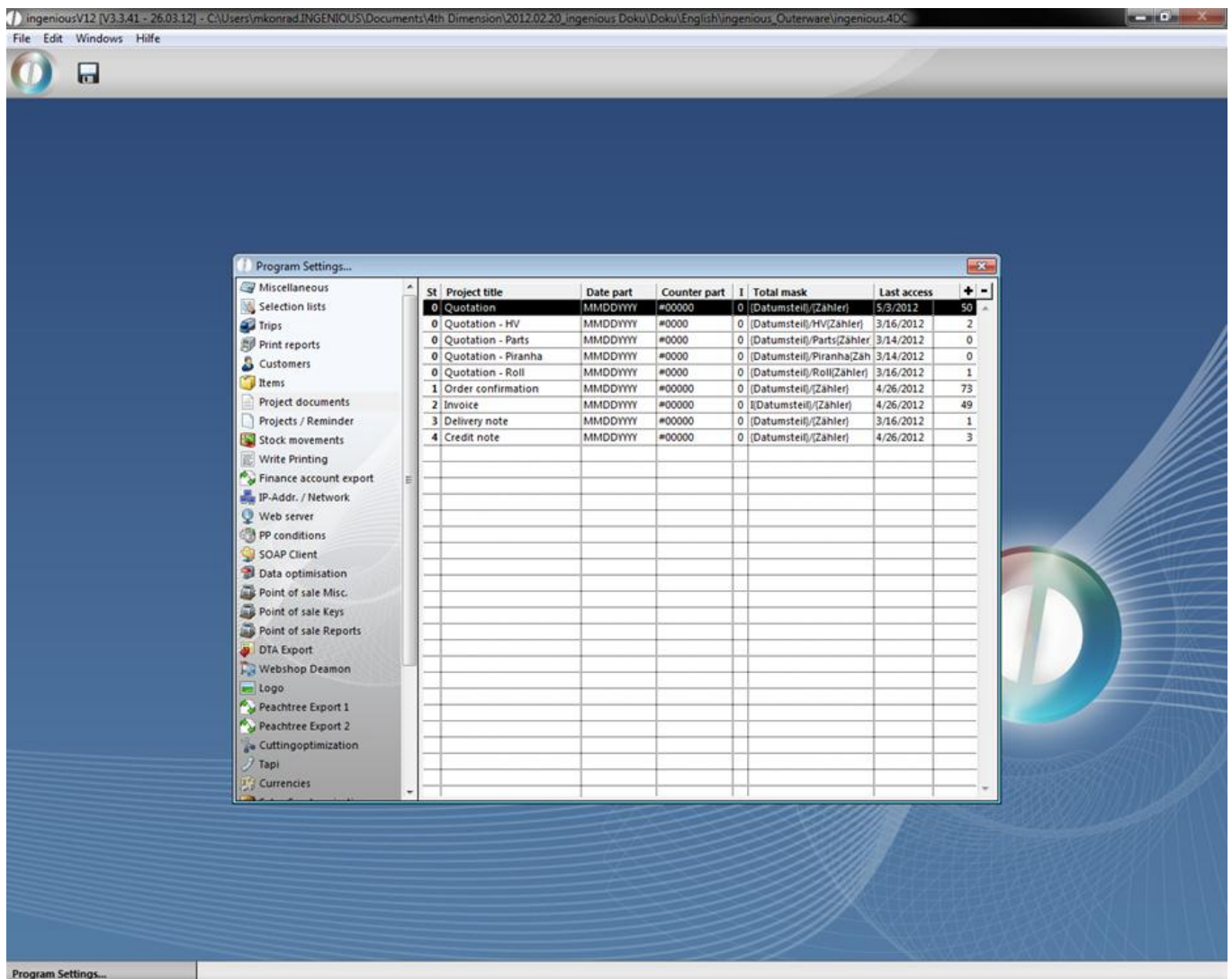
Next to the check field "activate" you can define a unified mask for the ongoing item numbers.



When you save the changes all new created items will have an automatically generated ongoing number:



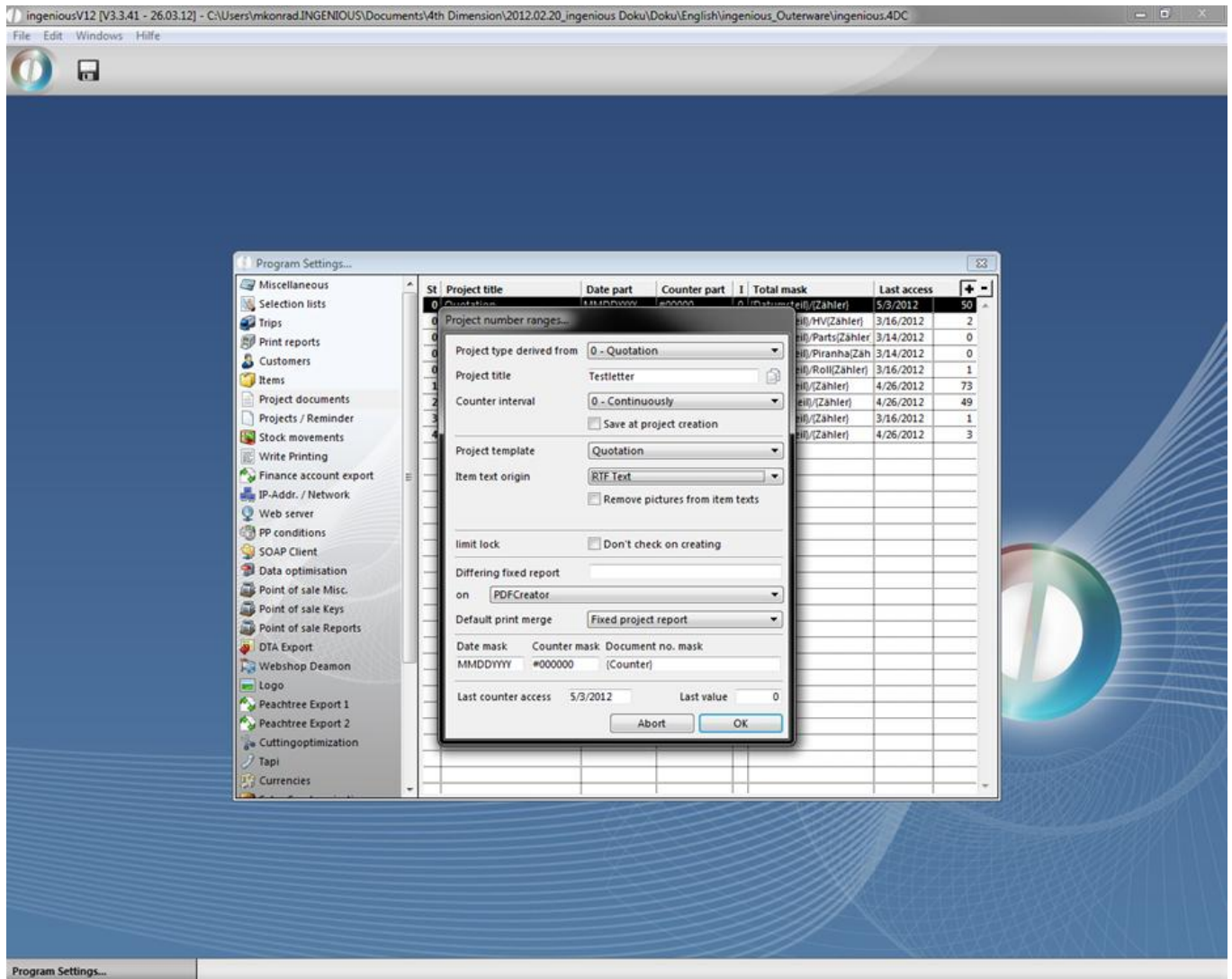
6.1.7 Project documents


In this area, you will find a summary of all default settings for the project documents.

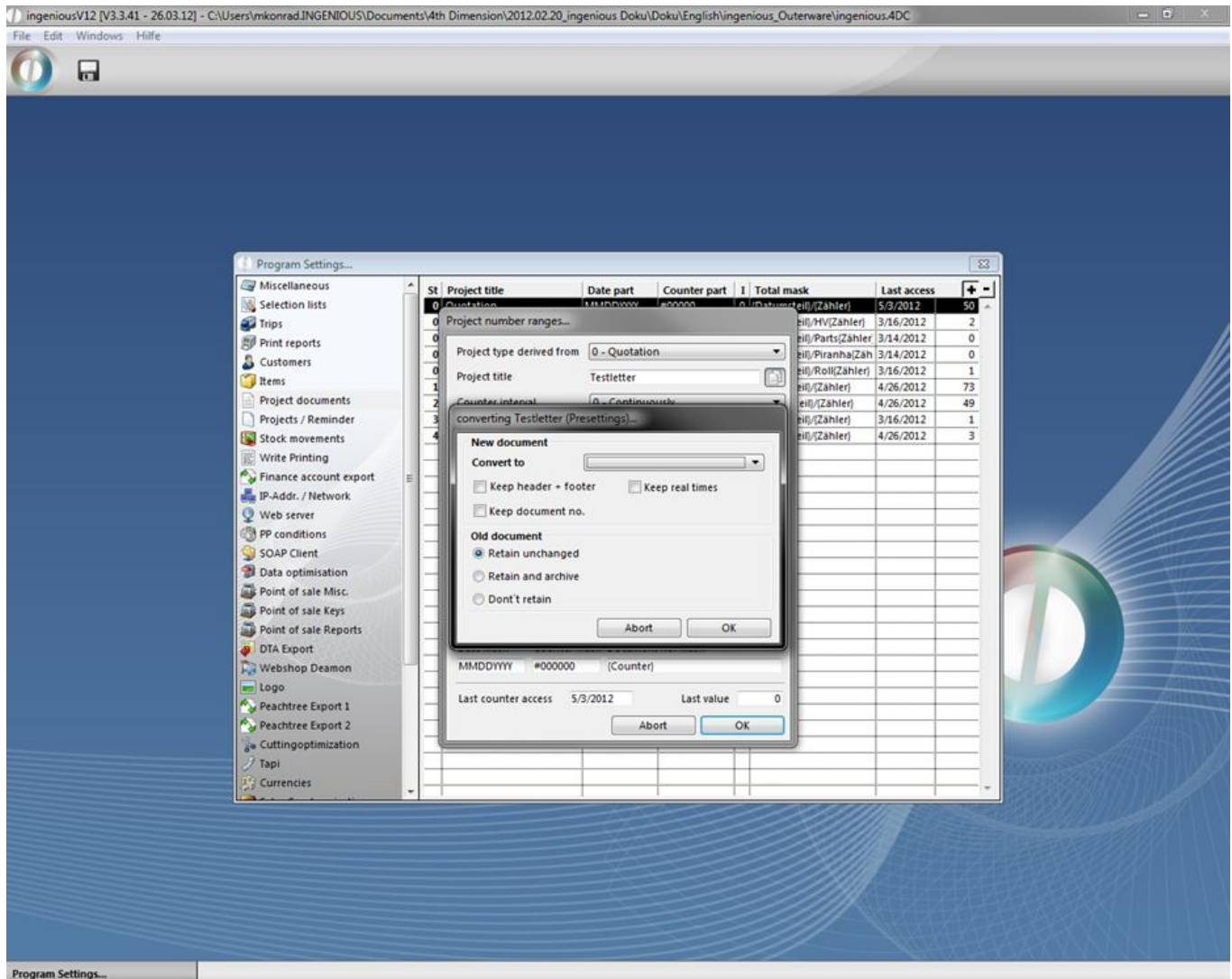


With the  button, you can create new default settings for a project document, or delete  them. You can also change the existing status. You will learn everything about this in the following exercise

Creating a project document



When you create a new project document, you must determine from which other project document it should derive. With the  button "Forward default settings for project status" you can determine which default settings should be kept in case you forward the project. A window opens, where you can determine that when forwarding a project, real times, document number as well as header and footer should be kept as standard. Furthermore, you can determine what should happen with the old document. These settings also can be changed again when forwarding the project.



The project documents in Ingenious.V12 will be numbered in a user-defined manner. You can select between four intervals - "Continuously", "Yearly", "Monthly" or "Daily". You hereby determine when the document number should start again with 1. By using this method, you always have an oversight of how many projects were created in the set interval with the respective number. In "Item Text Origin" you have the choice between the options "ASCII Text" and "RTF Text". When there are pictures stored that should be displayed with the offer, select "RTF Text". "ASCII" cannot display pictures. That is only possible with RTF texts. For this example select "RTF Text". For single documents, you can use this setting and change it in the "Parameter" column of the respective document. With the selection field, "Remove pictures from item texts", you give the instruction to delete stored article images from RTF texts. With the setting "Built-in word processing" the project documents will be printed in the built-in word processing. Here a printout is only possible in a detailed image. It is somewhat more professional to use the setting "Fixed project report". For companies that have to print several hundreds of project documents simultaneously from a list, the setting, "Fixed project report" is the most expedient. Single documents always will be printed with the built-in word processing. The adaptation of fixed documents requires programming work. In that case, you can contact Ingenious GmbH.

With the field "Template date", you can set any date format. "Y" stands for year, "M" for month and "D" for day. However, not all combinations of the three letters make sense.

Examples of combinations


"DDMMYYYY" 12022007

"DDMMYY" 120207

"MMYY" 0207

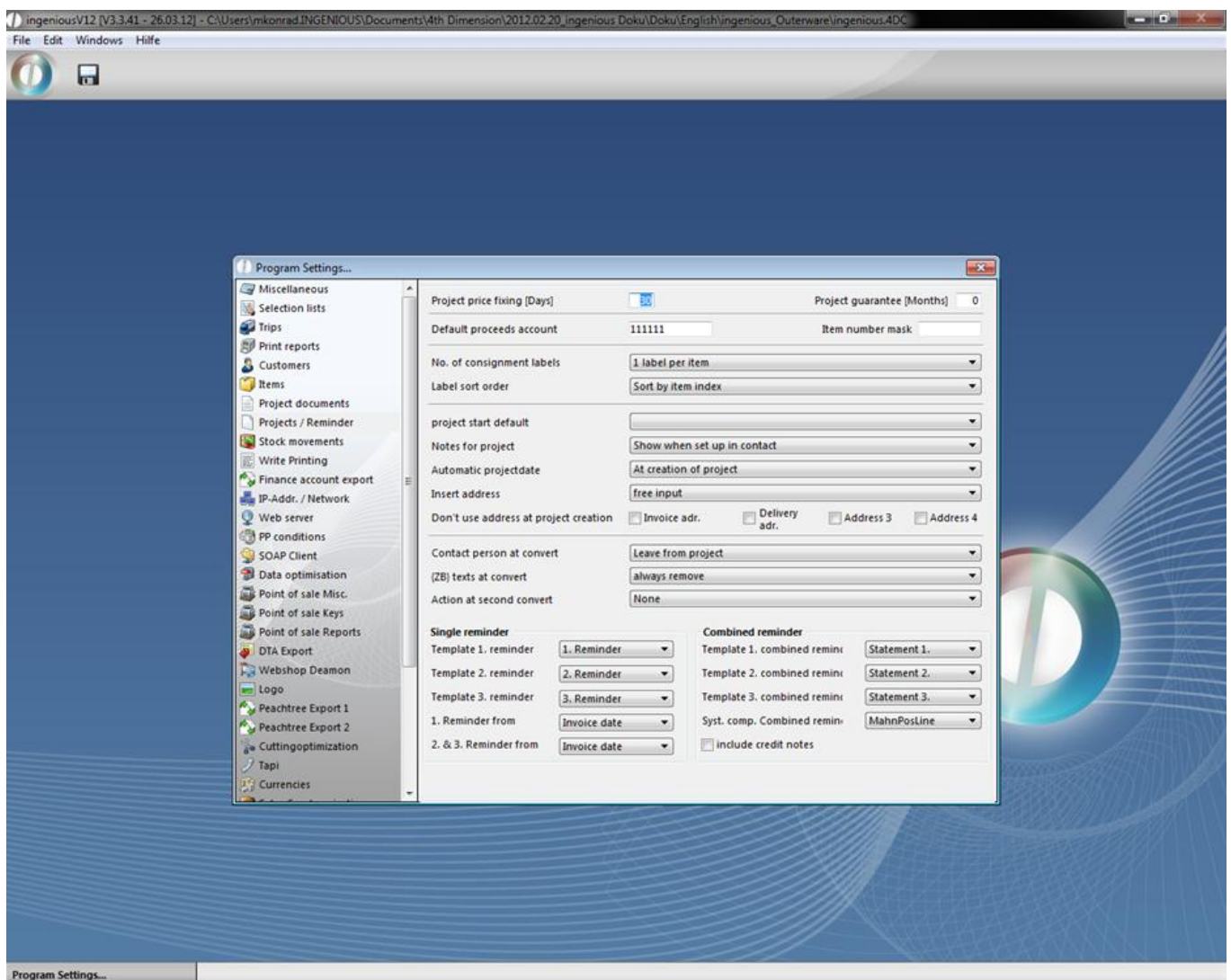
In the "Counter mask" field, you determine how many digits the counter should have. The field "Document no. mask" gives you the possibility to reproduce date settings and counter numbers in any combination (also with texts). Simply enter the placeholder "{Date section}" and "{Counter}" separated by "/".

Changing and deleting a project document

In order to make changes in a document already created, double-clicking on the document is sufficient to open the standard window with all the document settings, and here you can make any changes necessary. In order to delete a document, simply mark the document in the list with a mouse-click, and then click the  button. In order to be certain, an inquiry window appears which you confirm with the "OK" button.

6.1.8 Projects Reminder

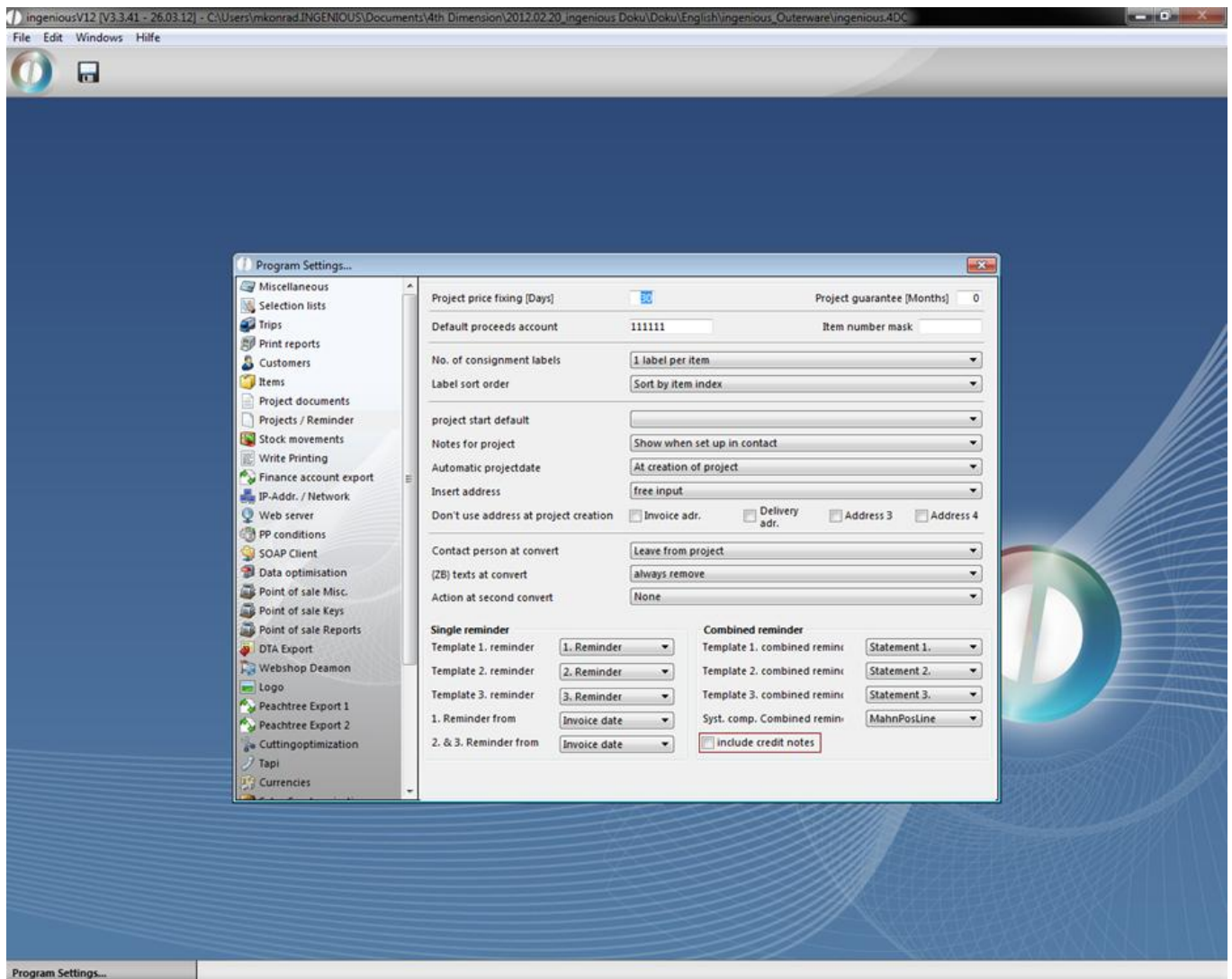
In the "Projects / Reminder" area, you can determine or change diverse standard project settings.



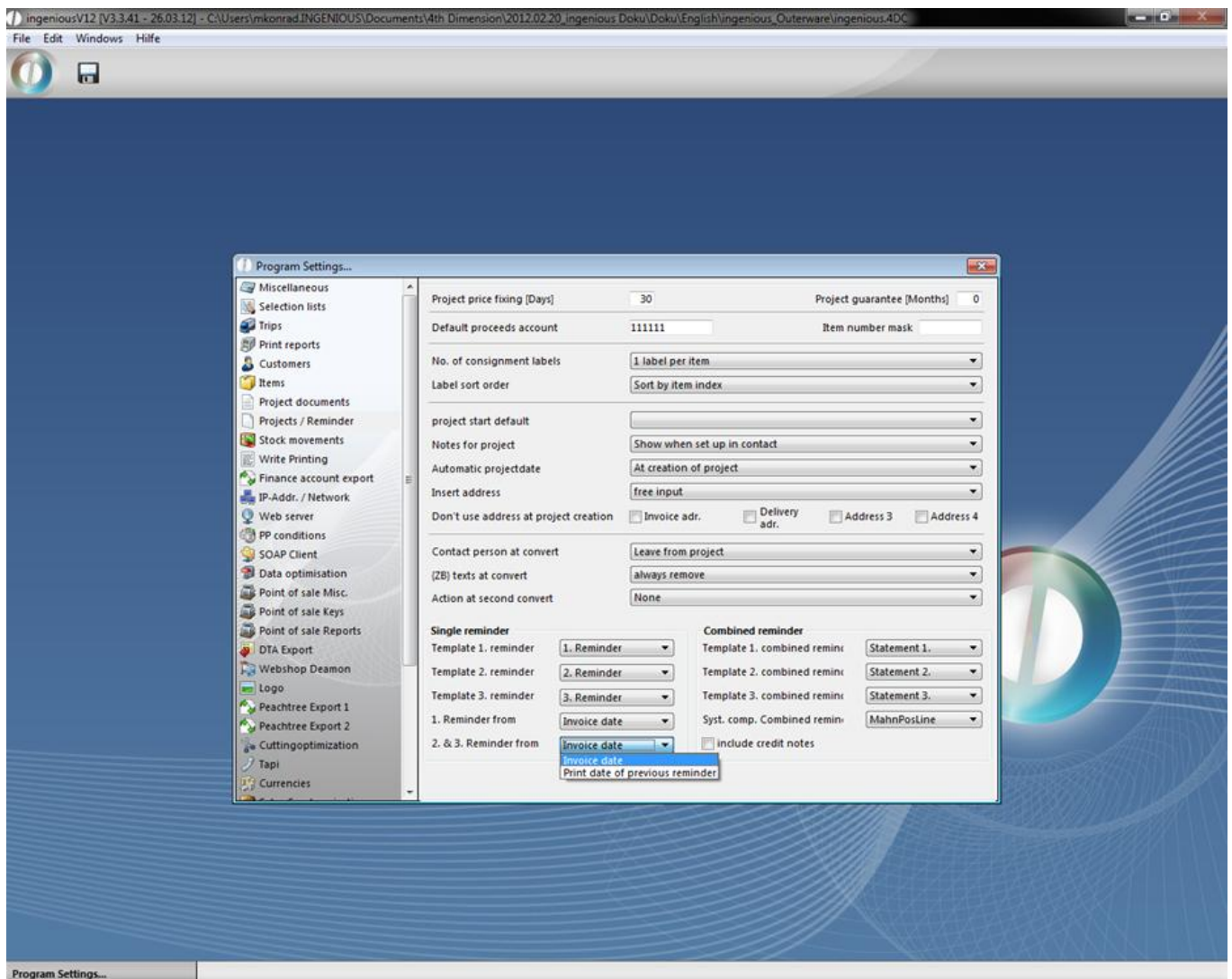
Here you can determine what the standard discount is, how many labels must be printed, when the automatic stock accounting should occur, what the sorting order should be with automatic orders, etc. Furthermore, you can determine various reminder forms in the "Single reminder" and "Combined reminder" fields, and you also can select an option for the system module.

In the field "item number mask" you can define how the items should be enumerated by default. For instance you can enter "000", so all item numbers begin with three zeros (0001, 0002, ...) If the field is empty, then the number starts automatically with "1".

In the creation of combined reminders the credit notes of customers will be regarded now. The credit notes will be included in the combined reminders. To do so you only have to check the field "include credit notes" in the program settings category "Projects / Reminder".



The dunning run can also be printed for single (selected) projects, instead of all projects. When you click the menu entry "Print – Workflow – Dunning run reminder printing" a dialog will be open, where you can set the preferred preferences.



The printing of a reminder in the project detail view is also registered in the category “Payments”.

The screenshot displays the 'Workflow List view' in the ingenious.V12 application. The interface includes a sidebar with filters for Project, Status, and View. The main table lists project documents with columns for Document type, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. A modal dialog box is overlaid on the table, prompting the user to 'Send PDF as mail' for selected documents. The dialog has three radio buttons: 'All displayed' (36), 'All selected' (1), and 'Current record'. There is also a checkbox for 'Send PDF as mail' and 'OK' and 'Abort' buttons.

Document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Quotation	05032012/00050	05/03/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	50.00 \$						
Credit note	04262012/00003	04/26/12		Peter Pahn USA-		6.61 \$	6.61 \$					
Credit note	04262012/00002	04/26/12		Peter Lustig USA-		9.45 \$	9.45 \$					
Invoice	04262012/00049	04/26/12		Peter Lustig USA-		51.85 \$	51.85 \$					
Invoice	04262012/00048	04/26/12		Peter Pahn USA-		36.29 \$	36.29 \$					
Quotation	04232012/00047	04/23/12	test 54	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$						
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Quotation	04232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV A	ton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Quotation	03232012/00038	03/23/12	HV A	ton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		ue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		ue Chicago 12345		0.00 \$						
Credit note	03162012/00001	03/16/12		ue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation - HV	03162012/HV000	03/16/12		ue Chicago 12345		3,738.00 \$						
Invoice	03162012/00038	03/16/12		ue Chicago 12345		1,598.70 \$	0.00 \$					
Quotation - Roll	03162012/Roll000	03/16/12		ue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	ue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		ton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00030	03/14/12		ton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		ton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		ton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

6.1.9 Stock movements

In the detail view of an order confirmation and in the detail view of single items there is the new category "Inventory postings". Here you find a listing of all stock kept items of the project.

Attention: The automatic stock posting when the project is finalized has to be enabled. You can also bind the inventory posting to the finalization of an invoice or delivery document. Then the new category will be displayed in the specific project.

ingenious.V12 [V3.3.41 - 26.03.12] - C:\Users\mkonrad\INGENIOUS\Documents\4th Dimension\2012.02.20_ingenious Doku\English\ingenious_Outerware\ingenious.4DC

File Edit Projects Print Print preview Windows Hilfe

Stock postings


Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04262012/00073]

Matchcode	Quantity	X [inch]	Total	Stock post...	Unit	PP	PP Total	SP	SP Total	Item num...	P. order n...	Product text
Bookend Clip White FL	26.000		26.000	26.000	PC	0.86	22.36	2.71	70.46	342300-01	/hvcclipsbz	Bookenc
HV #3 Long Screw FL	398.000		398.000	398.000	PC	0.13	51.74	10.00	3,980.00	343003-00	10N300TH84	HV #3 L
HV 90/180 STARTER 20ft white FL	5.000	240.000	100.000	108.000	ft	0.82	88.56	1.25	125.01	341200-01	41-WH-415	HV 90/180
HV Blade no.3 16.5ft white 1 (single)	16.808	198.000	277.343	299.531	ft	0.00	0.00	0.00	0.00	345003-01-1	41-WH-405	High Velocity Blade No.3 -
HV Blade no.3 16.5ft white 10Pack	1.893	198.000	31.250	33.750	ft	0.00	0.00	0.00	0.00	345003-01-1		High Velocity Blade - wh
HV Blade no.3 16.5ft white FL	35.748	198.000	589.843	589.843	ft	1.17	690.11	2.39	1,409.73	345302-01		HV Blade no.3 :
HV CEILING HEADER No.1 20ft white f	5.416	240.000	108.333	117.000	ft	2.84	332.28	4.14	448.52	340000-01	41-WH-424	HV CEILB
HV CENTERMATE no.1 20ft white FL	5.000	240.000	100.000	108.000	ft	2.81	303.48	4.42	442.00	341400-01	41-WH-421	HV Standard
HV Egress lock White FL	16.000		16.000	16.000	PC	5.46	87.36	8.31	132.96	344001-01	/lohvtt/wh	HV Egress L
HV Hat Bushings FL	106.000		106.000	106.000	PC	0.01	1.06	10.00	1,060.00	343004-01	/hvhat1	HV H
HV Short Screw FL	128.000		128.000	128.000	PC	0.10	12.80	10.00	1,280.00	343001-00	14d175tuw4	HV :
HV Wheel Carriage FL	106.000		106.000	106.000	PC	0.36	38.16	0.71	75.26	343006-00	/wcl10	HV Wh
LONG NYLON BUSHING FL	292.000		292.000	292.000	PC	0.03	8.76	10.00	2,920.00	343002-01	/hvlong1	LONG NYLO
Mini Felt FL	216.666	12.000	216.666	234.000	ft	0.04	9.36	0.09	19.50	130200-00	26027045GY	Guide Rail Mini Felt
SHORT NYLON BUSHING FL	106.000		106.000	106.000	PC	0.03	3.18	10.00	1,060.00	343003-01	/hvshort1	SHORT NYLO
Velcro Strap White FL	6.000		6.000	6.000	PC	1.73	10.38	2.71	16.26	342110-01	/strapwh	HV Velcro :

Total PP: 1,918.36 Stock PP: 1,659.59 Stock SP: 13,039.70

[Order confirmation 04262012/00073]

With the button  the window "Item stockview" will open up, where you can enable and disable several columns with a double click. Also you can change the order of the columns by drag and drop them in the list.


The screenshot displays the 'ingenious.V12' application window. The main area shows a table titled 'Projects detail view [Ingenious] - [Order confirmation 04262012/00073]'. The table lists various items with columns for Matchcode, Quantity, X [inch], Total, Stock post..., Unit, PP, PP Total, SP, SP Total, Item num..., P. order n..., and Product text. A 'Show/Hide columns' dialog box is overlaid on the table, providing a list of columns with checkboxes to show or hide them. The dialog also includes options to 'save current column size' and 'reset column size and sort order'. At the bottom of the window, there are summary fields for 'Total PP', 'Stock PP', and 'Stock SP'.

Matchcode	Quantity	X [inch]	Total	Stock post...	Unit	PP	PP Total	SP	SP Total	Item num...	P. order n...	Product text
Bookend Clip White FL	26.000		26.000	26.000	PC	0.86	22.36	2.71	70.46	342300-01	/hwclipsbz	Bookenc
HV #3 Long Screw FL	398.000		398.000	398.000	PC	0.13	51.74	10.00	3,980.00	343003-01	10N300TH84	HV #3 L
HV 90/180 STARTER 20ft white FL	5.000	240.000	100.000	108.000	ft	0.82	88.56	1.25	125.01	341200-01	41-WH-415	HV 90/1
HV Blade no.3 16.5ft white 1 (single)	16.808	198.000	277.343	299.531	ft	0.00	0.00	0.00	0.00	345003-01-1	41-WH-405	High Velocity Blade No.3 -
HV Blade no.3 16.5ft white 10Pack	1.893	198.000	31.250	33.750	ft	0.00	0.00	0.00	0.00	345003-01-1		High Velocity Blade - wh
HV Blade no.3 16.5ft white FL	35.748	198.000	589.843	589.843	ft	1.17	690.11	2.39	1,409.73	345302-01		HV Blade no.3 :
HV CEILING HEADER No.1 20ft white f	5.416	240.000	108.333	117.000	ft	2.84	332.28	4.14	448.52	340000-01	41-WH-424	HV CEILB
HV CENTERMATE no.1 20ft white FL	5.000	240.000	100.000	108.000	ft	2.81	303.48	4.42	442.00	341400-01	41-WH-421	HV Standard
HV Egress lock White FL	16.000		16.000	16.000	PC	5.46	87.36	8.31	132.96	344001-01	/lohvtt/wh	HV Egress L
HV Hat Bushings FL	106.000		106.000	106.000	PC	0.01	1.06	10.00	1,060.00	343004-01	/hwhtat1	HV H
HV Short Screw FL	128.000		128.000	128.000	PC	0.01	12.80	10.00	1,280.00	343001-00	14d175tuw4	HV :
HV Wheel Carriage FL	106.000		106.000	106.000	PC	0.01	10.60	10.00	1,060.00	343006-00	/wcl10	HV Wh
LONG NYLON BUSHING FL	292.000		292.000	292.000	PC	0.01	2.92	10.00	2,920.00	343002-01	/hwlong1	LONG NYLO
Mini Felt FL	216.666		216.666	216.666	PC	0.01	2.17	10.00	2,166.66	130200-00	26027045GY	Guide Rail Mini Felt
SHORT NYLON BUSHING FL	106.000		106.000	106.000	PC	0.01	1.06	10.00	1,060.00	343003-01	/hwshort1	SHORT NYLO
Velcro Strap White FL	6.000		6.000	6.000	PC	0.01	0.06	2.71	16.26	342110-01	/strapwh	HV Velcro :

At the bottom of the window, the following summary fields are visible:

- Total PP: 1,918.36
- Stock PP: 1,659.59
- Stock SP: 13,039.70

When you enable the field "save current column size", all your settings in the detail view will be applied. With the field "reset column size and sort order" the settings will be reset.

If you want to print the listed items, click on the button . In the printout the column size of the detail view will be applied and the totals will be summed.

Inventory postings...

Order confirmation: 04262012/00073
Project: pps

Matchcode	Quantity	X [inch]	Total	Stock posted	Unit	PP	PP Total	SP	SP Total
Bookend Clip White FL	26.000		26.000	26.000	PC	0.86	22.36	2.71	
HV #3 Long Screw FL	398.000		398.000	398.000	PC	0.13	51.74	10.00	3.00
HV 90/180 STARTER 20ft white FL	5.000	240.000	100.000	108.000	ft	0.82	88.56	1.25	
HV Blade no.3 16.5ft white 1 (single)	16.808	198.000	277.343	299.531	ft	0.00	0.00	0.00	
HV Blade no.3 16.5ft white 10Pack	1.893	198.000	31.250	33.750	ft	0.00	0.00	0.00	
HV Blade no.3 16.5ft white FL	35.748	198.000	589.843	589.843	ft	1.17	690.11	2.39	1.00
HV CEILING HEADER No.1 20ft white	5.416	240.000	108.333	117.000	ft	2.84	332.28	4.14	
HV CENTERMATE no.1 20ft white FL	5.000	240.000	100.000	108.000	ft	2.81	303.48	4.42	
HV Egress lock White FL	16.000		16.000	16.000	PC	5.46	87.36	8.31	
HV Hat Bushings FL	106.000		106.000	106.000	PC	0.01	1.06	10.00	1.00
HV Short Screw FL	128.000		128.000	128.000	PC	0.10	12.80	10.00	1.00
HV Wheel Carriage FL	106.000		106.000	106.000	PC	0.36	38.16	0.71	
LONG NYLON BUSHING FL	292.000		292.000	292.000	PC	0.03	8.76	10.00	2.00
Mini Felt FL	216.666	12.000	216.666	234.000	ft	0.04	9.36	0.09	
SHORT NYLON BUSHING FL	106.000		106.000	106.000	PC	0.03	3.18	10.00	1.00
Velcro Strap White FL	6.000		6.000	6.000	PC	1.73	10.38	2.71	
							1,659.59	13.0	

P. order n... Product text
/hvcclipsbz Bookend
10N300TH84 HV #3 L
41-WH-415 HV 90/180
41-WH-405 High Velocity Blade No.3 -
High Velocity Blade - wh
HV Blade no.3 :
41-WH-424 HV CEILB
41-WH-421 HV Standard
/lohvt/wh HV Egress L
/hvat1 HV H
14d175tuxw4 HV :
/wcl0 HV Wh
/hvlong1 LONG NYLO
26027045GY Guide Rail Mini Felt
/hshort1 SHORT NYLO
/strapwh HV Velcro

As mentioned in the beginning, the category "Inventory postings" will be displayed in the item detail view. When you double click on a item in the category "Items", the detail view of the item will open up.

ingenious.V12 [V3.3.41 - 26.03.12] - C:\Users\mkonrad\INGENIOUS\Documents\4th Dimension\2012.02.20_ingenious Doku\English\ingenious_Outerware\ingenious.4DC

File Edit Windows Hilfe

Stock postings

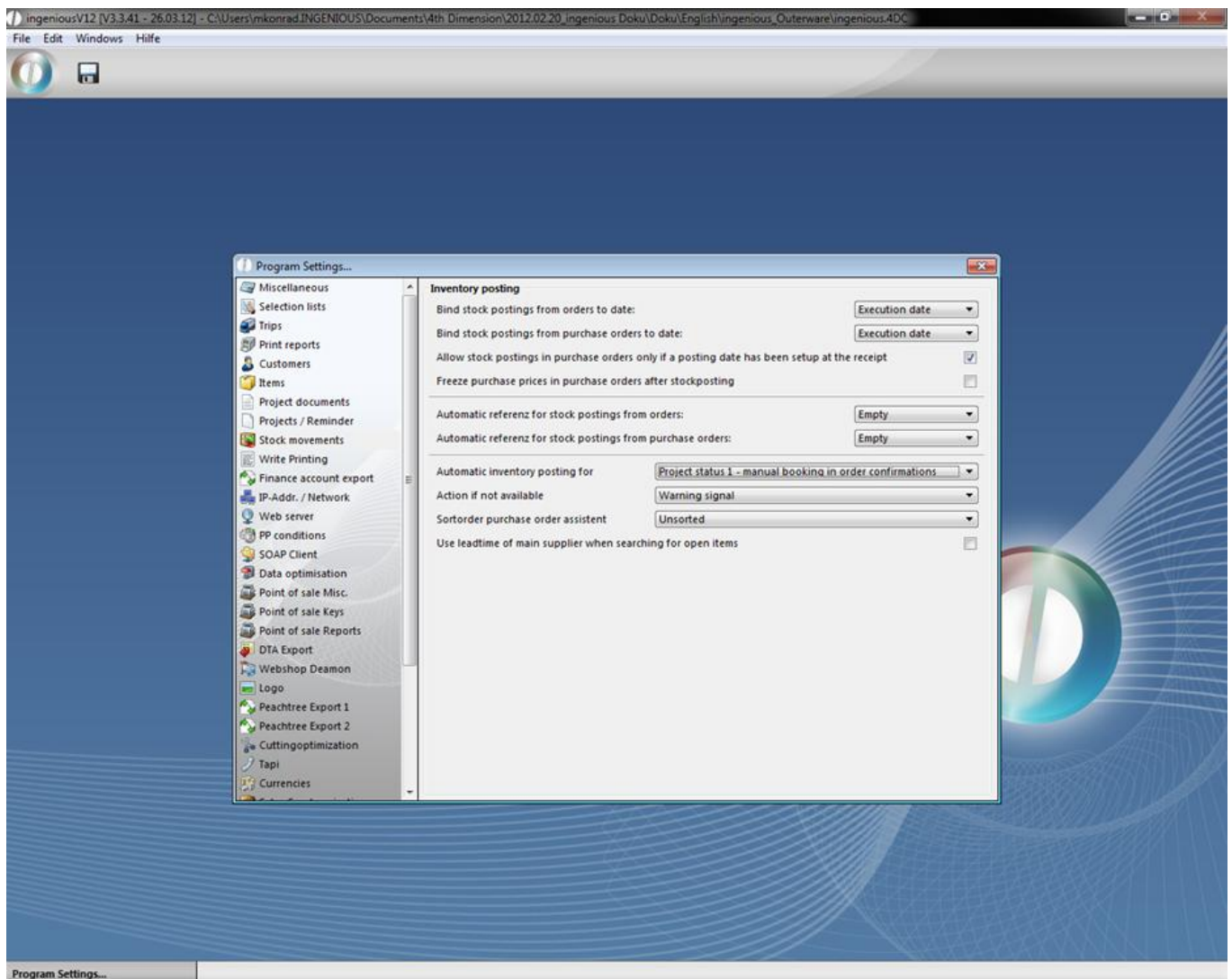
Apply filter after search?

Projects detail view [Ingenious] - [Order confirmation 04262012/00073]

Matchcode	Quantity	X [inch]	Y [inch]	Z [inch]	Total	Stock pos...	Stock Is	Stock Min	Proposal	Unit	PP	PP Total	SP
Bookend Clip White FL	10.000				10.000	10.000	-47.000	0.000	50.000	PC	0.86	8.60	2.71
HV #3 Long Screw FL	70.000				70.000	70.000	-264.000	500.000	2.000.000	PC	0.13	9.10	10.00
HV 90/180 STARTER 20ft white FL	10.000	16.875			14.062	15.187	97.255	0.000	280.000	ft	0.82	12.45	1.25
HV Blade no.3 16.5ft white 1 (single)	25.000	16.875			35.156	37.968	-344.766	0.000	1.980.000	ft	0.00	0.00	0.00
HV Blade no.3 16.5ft white 10Pack	0.000	16.875			0.000	0.000	31.690	0.000	1.980.000	ft	0.00	0.00	0.00
HV Blade no.3 16.5ft white FL	25.000	16.875			35.156	35.156	1,034.197	0.000	1.980.000	ft	1.17	41.13	2.38
HV CEILING HEADER No.1 20ft white f	0.958	240.000			19.166	20.700	-258.800	0.000	80.000	ft	2.84	58.78	4.14
HV CENTERMATE no.1 20ft white FL	10.000	16.875			14.062	15.187	-116.620	0.000	120.000	ft	2.81	42.67	4.42
HV Egress lock White FL	5.000				5.000	5.000	2.000	0.000	30.000	PC	5.46	27.30	8.31
HV Hat Bushings FL	20.000				20.000	20.000	1,764.000	302.000	2.000.000	PC	0.01	0.20	10.00
HV Short Screw FL	40.000				40.000	40.000	-8.000	0.000	2.000.000	PC	0.10	4.00	10.00
HV Wheel Carriage FL	20.000				20.000	20.000	1,764.000	302.000	2.000.000	PC	0.36	7.20	0.71
LONG NYLON BUSHING FL	50.000				50.000	50.000	-6,214.000	1,000.000	2.000.000	PC	0.03	1.50	10.00
Mini Felt FL	20.000	23.000			38.333	41.400	-508.600	200.000	500.000	ft	0.04	1.65	0.09
SHORT NYLON BUSHING FL	20.000				20.000	20.000	-2,236.000	0.000	0.000	PC	0.03	0.60	10.00

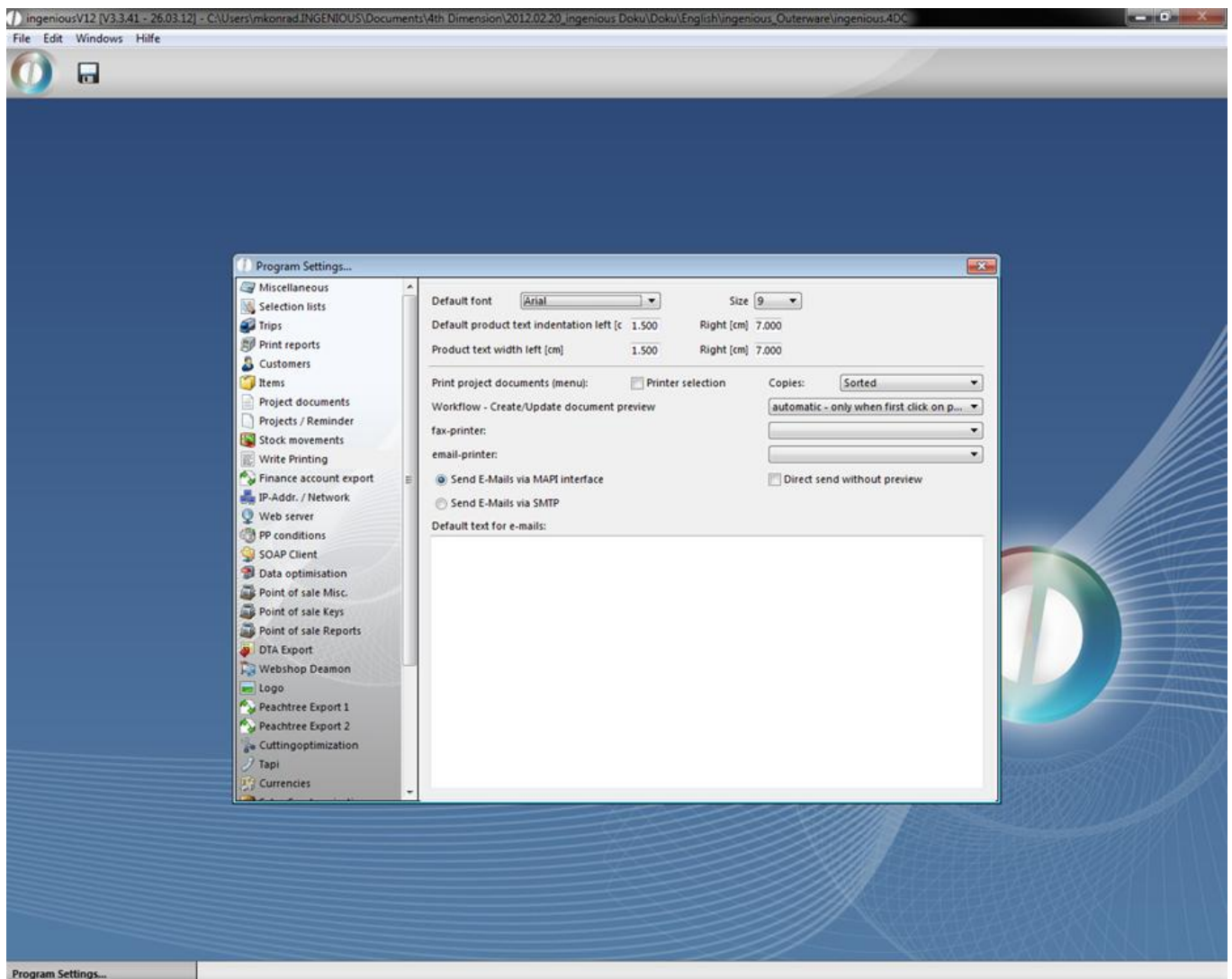
[Order confirmation 04262012/00073]

You can also bind the inventory posting to any date of the project and define a automatic reference. The corresponding settings you can find in the category "Stock movements".



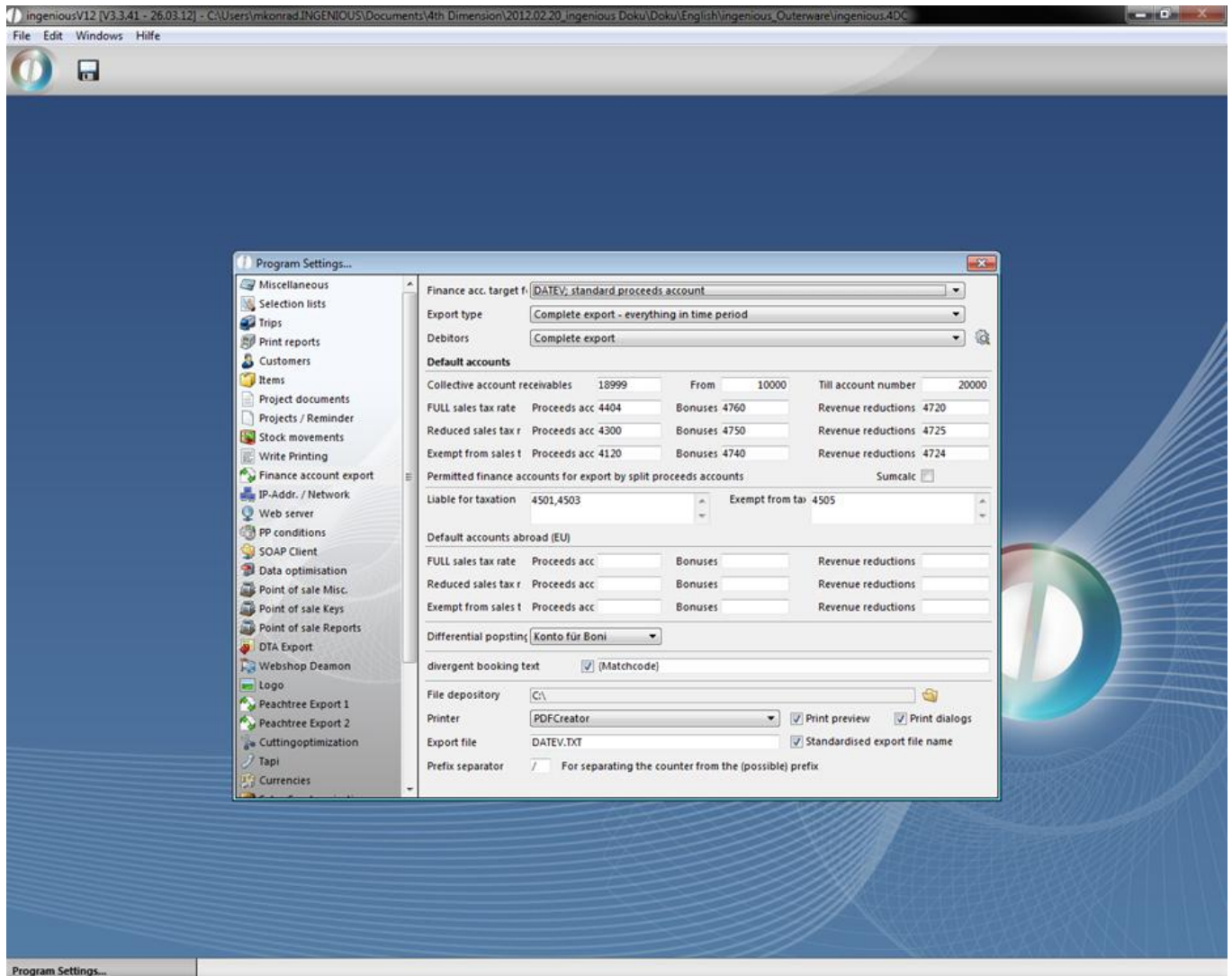
6.1.10 Write printing

In the "Write printing" field, the following standard settings for the built-in word processing in Ingenious.V12 can be changed: font style and size, article entry and article text width.




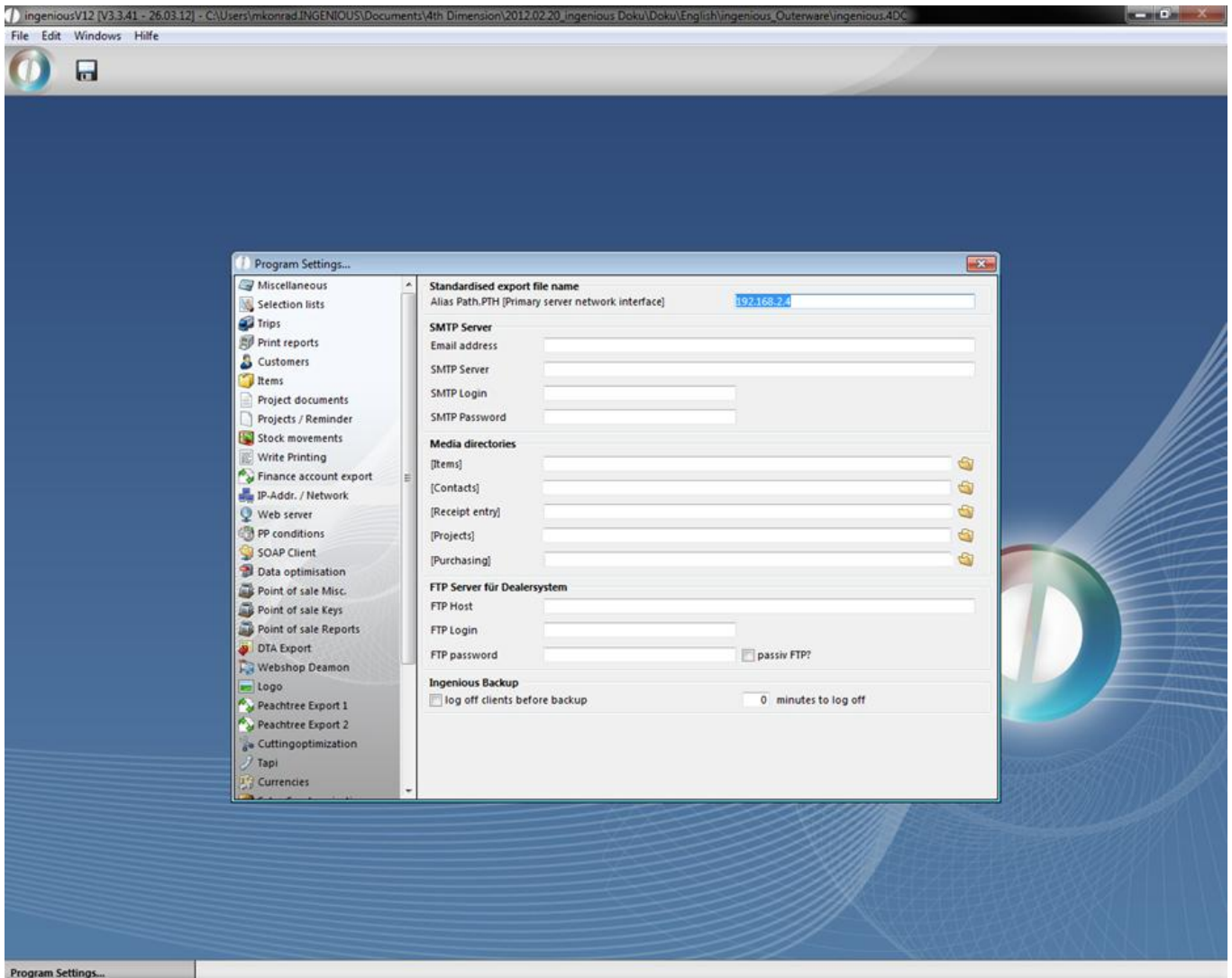
6.1.11 Finance account export

This area should be interesting for you, when you want to transmit your data electronically to an internal or external accounting facility. If desired, other interfaces are possible. Contact Ingenious GmbH for more information.



6.1.12 IP address network

In this area, Ingenious.V12 should be notified under which address the server can be found. This setting should be handled by your network administrator or by an Ingenious.V12 representative. Here the "SMTP server", the "E-mail address" of the sender, his "SMTP Server" and login data are determined for serial letter functionality. All data entries of the individual modules will be stored in the media directory. With the  button, you reach the standard dialogue window of the file selection in Windows where you can select a folder as a directory.



Retailer system

The retailer system is a interface between the ingenious.V12 basic system (server) and the installed single place version or client/server versions of the retailer to deliver item information and special prices from the producer. The improvement is, that the files are provided via FTP. So the retailer system can be updated automatically.

Configurations settings in the Ingenious.V12 basic system

In order that the retailer system can download the item information / item changes, the FTP connection information have to be entered. The FTP data can be entered in the program settings category "IP-Addr. / Network" of the basic system. Before every item download the data will be transferred to the retailer system.

Execution of the update on the retailer system

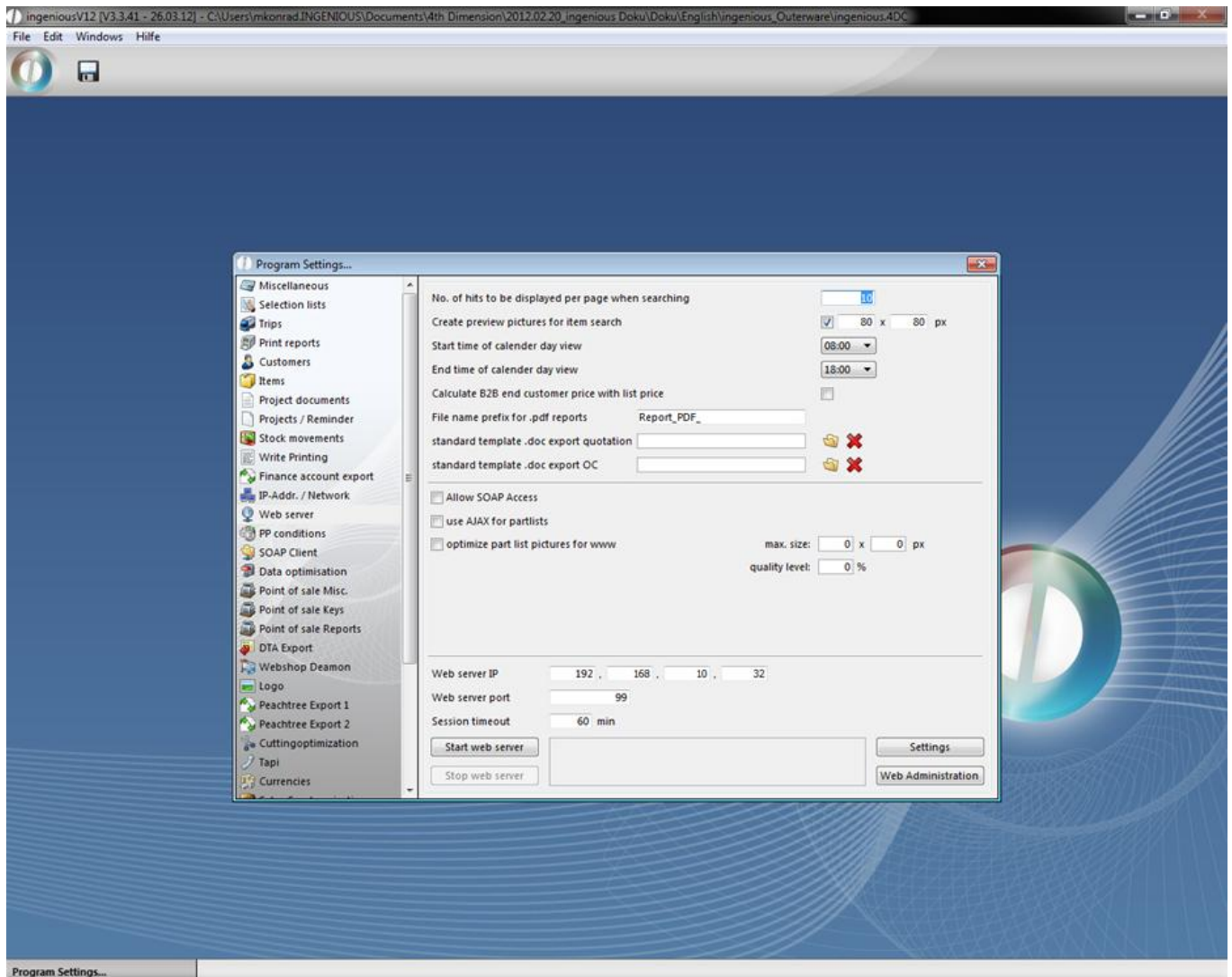
When you start the update function a window will open up, where the current state of the data synchronization is displayed. You can only close the window after a successful or failed update process.



6.1.13 Web Server

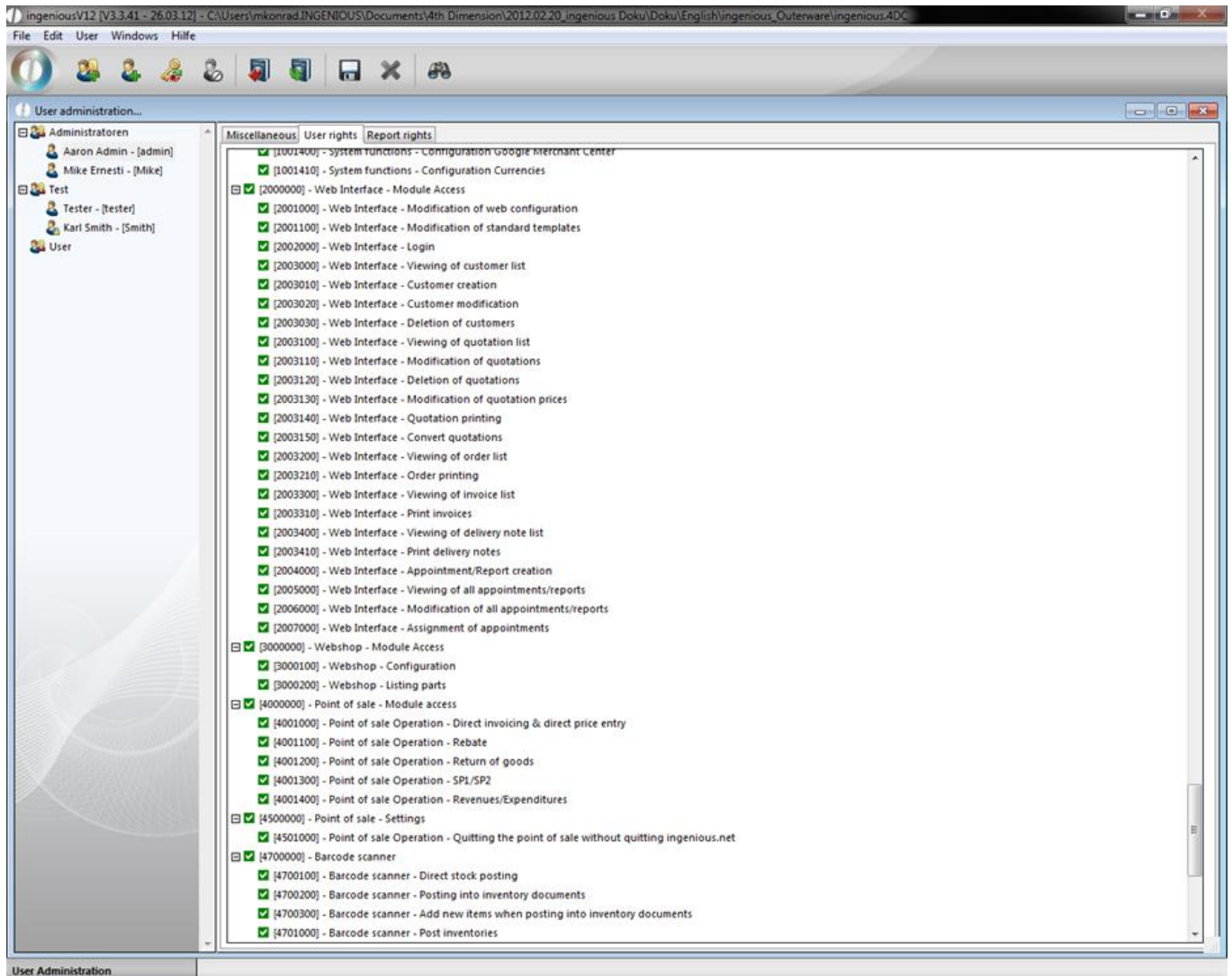
When you operate Ingenious.V12 with a web server, IP address and port number, a server must be named. You can also set the number of hits per page when looking for contacts, as well as the starting and ending time in the calendar page. When you activated the field "Permit SOAP access", the user access to the orders in the module "Purchase" is possible. For detailed information on this topic, please contact Ingenious GmbH. The remaining fields are for the setting of the Web access, and/or Web interface. With its help, you always have access to the Ingenious.V12 database. Your appointments, as well as all contact data and reports are always current and help you make important decisions

with the client on location.



Web access / Web interface


In the 4D client register of the computer that serves as a web server, the file "Web folder" must exist. This contains the image folder "Images" as well as the data file "Index.html" and "onmouseover.css". In the program settings, the IP address and IP port (Standard: 80) must be entered and stored. With the buttons "Start webserver" and "Stop webserver", the web server can be controlled if the following conditions are met:

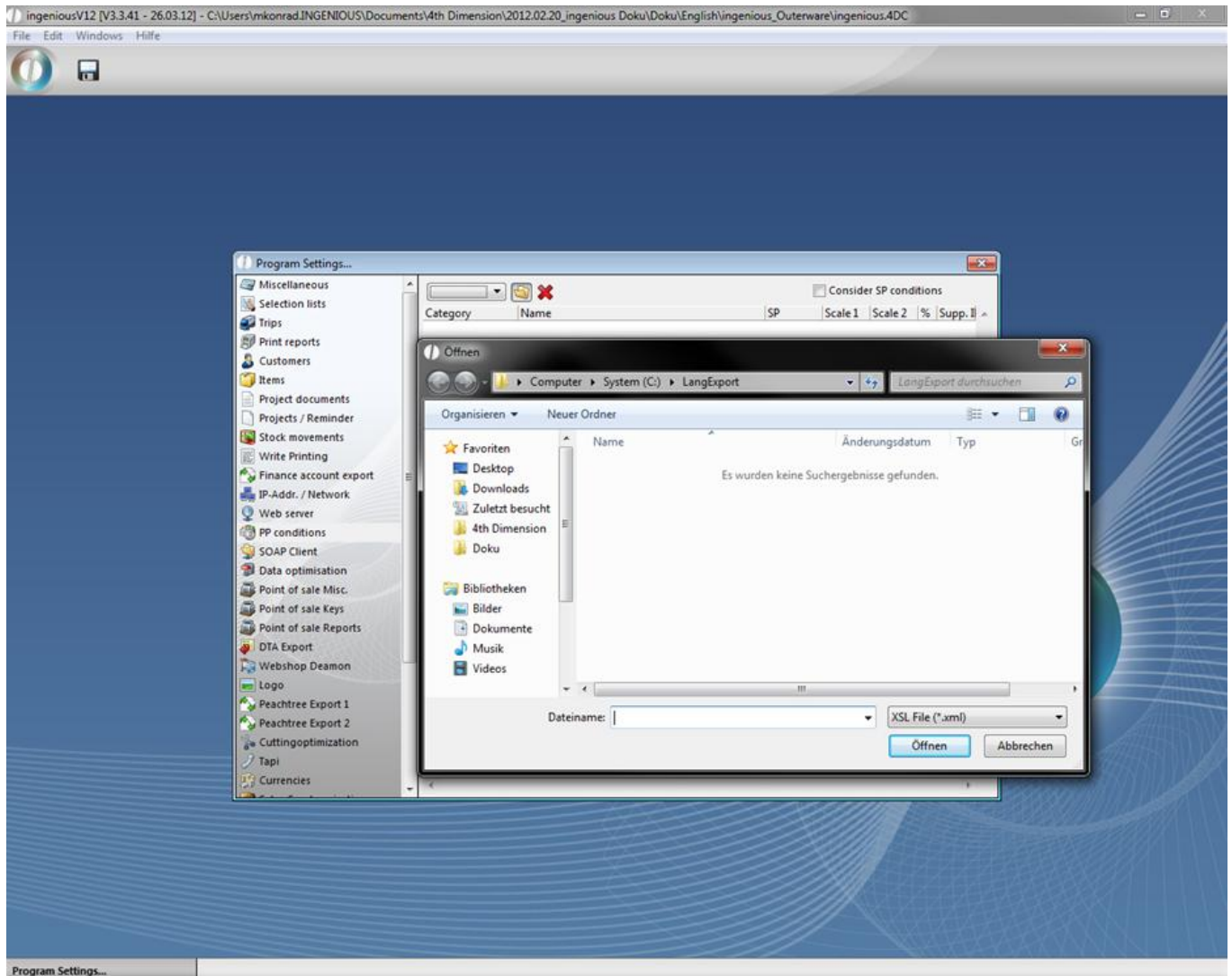


Only one computer can be a web server for web access!


With the button "Web administration" one reaches the configuration for the HTML system pages. The following pages must be created with content here.

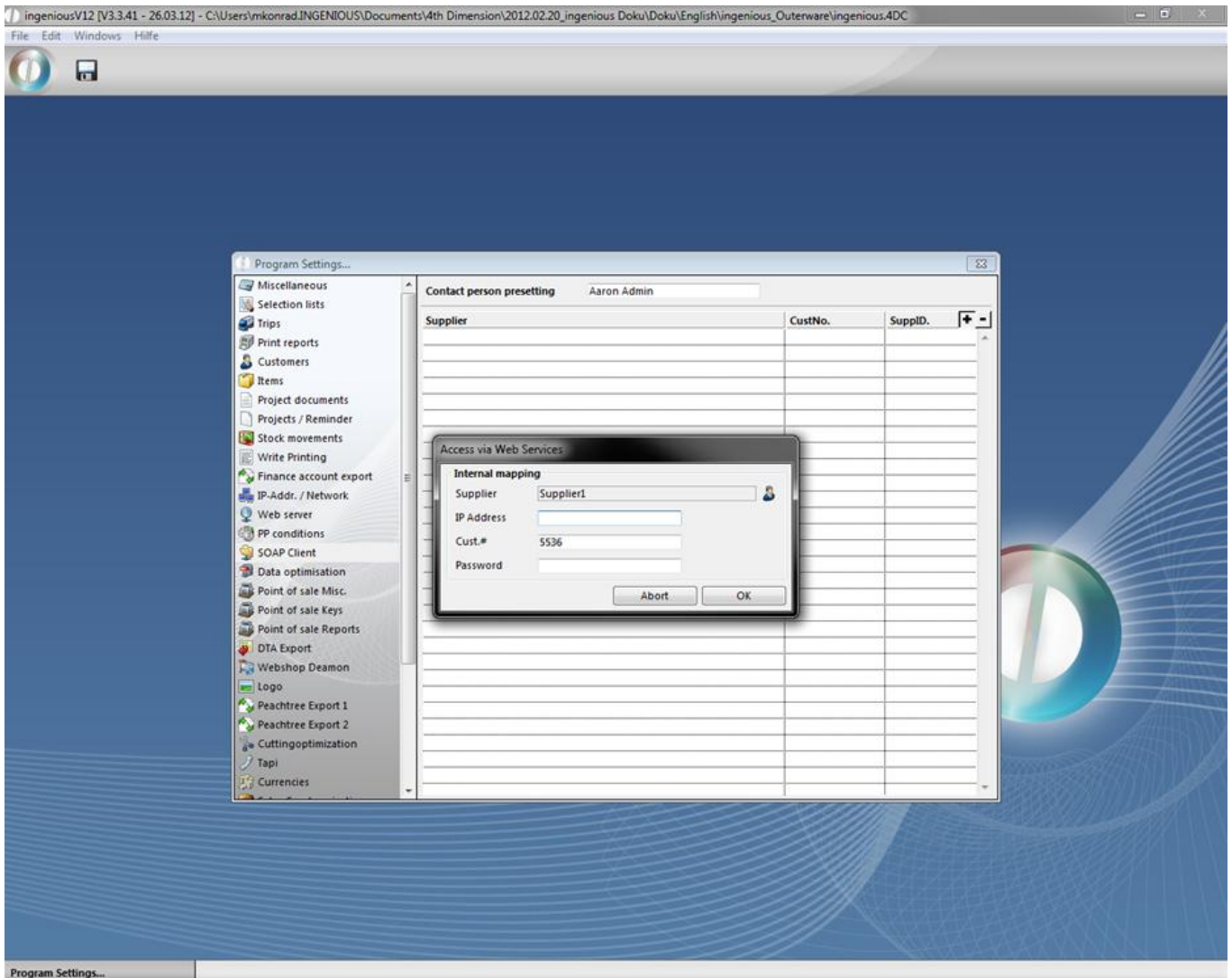
6.1.14 PP Conditions



In the "PP conditions" field, PP conditions can be imported by using the special prices icon  so that special prices of a wholesale merchant or manufacturer, can be adopted by you. Special prices can also be exported as PP conditions.



6.1.15 SOAP client

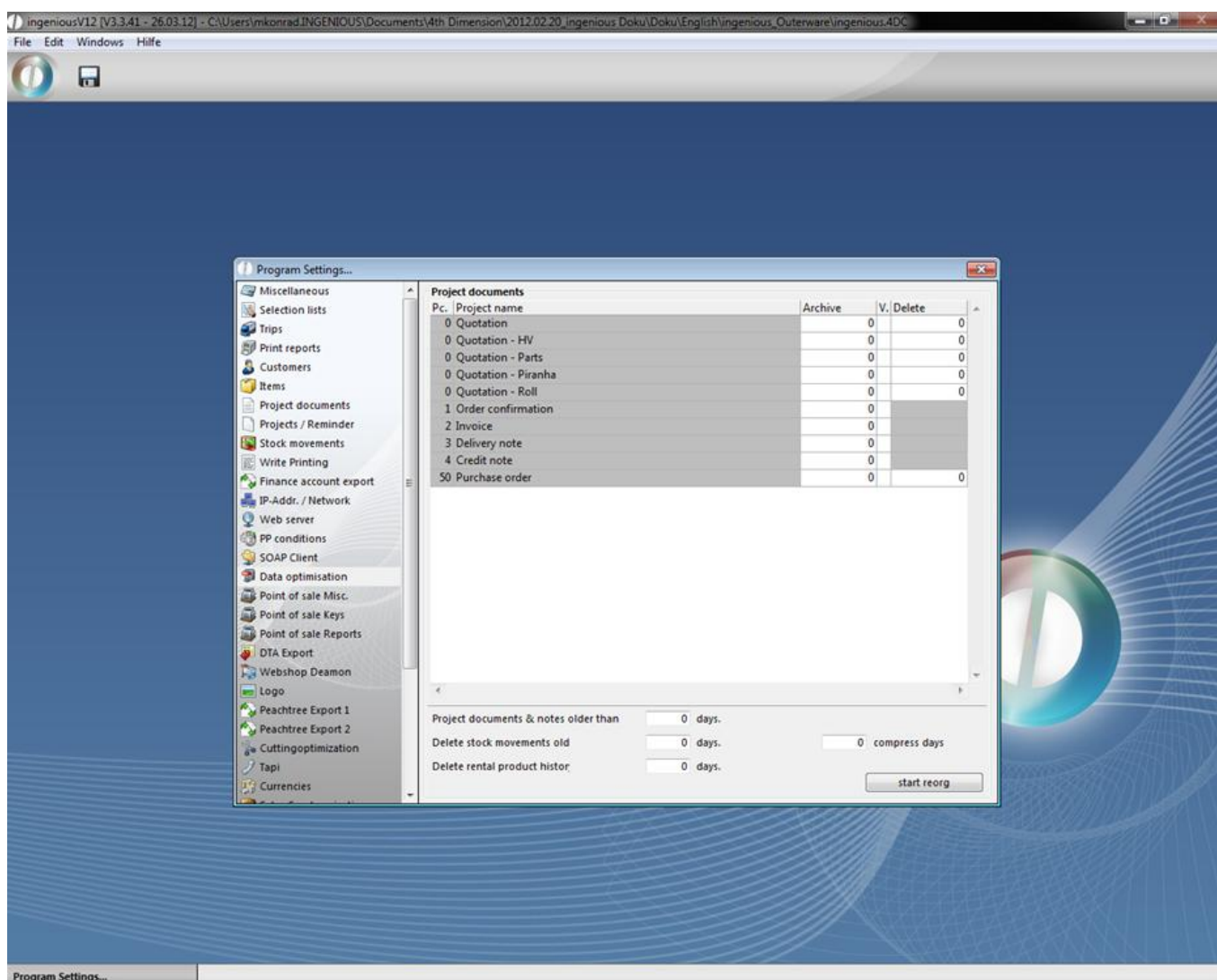
The column "SOAP Client" is of interest for you when you apply Ingenious.V12 as a merchant's online ordering system. Then the names of the suppliers will be saved if this order form can be used with them. With the  button, you can enter the name of a new supplier.



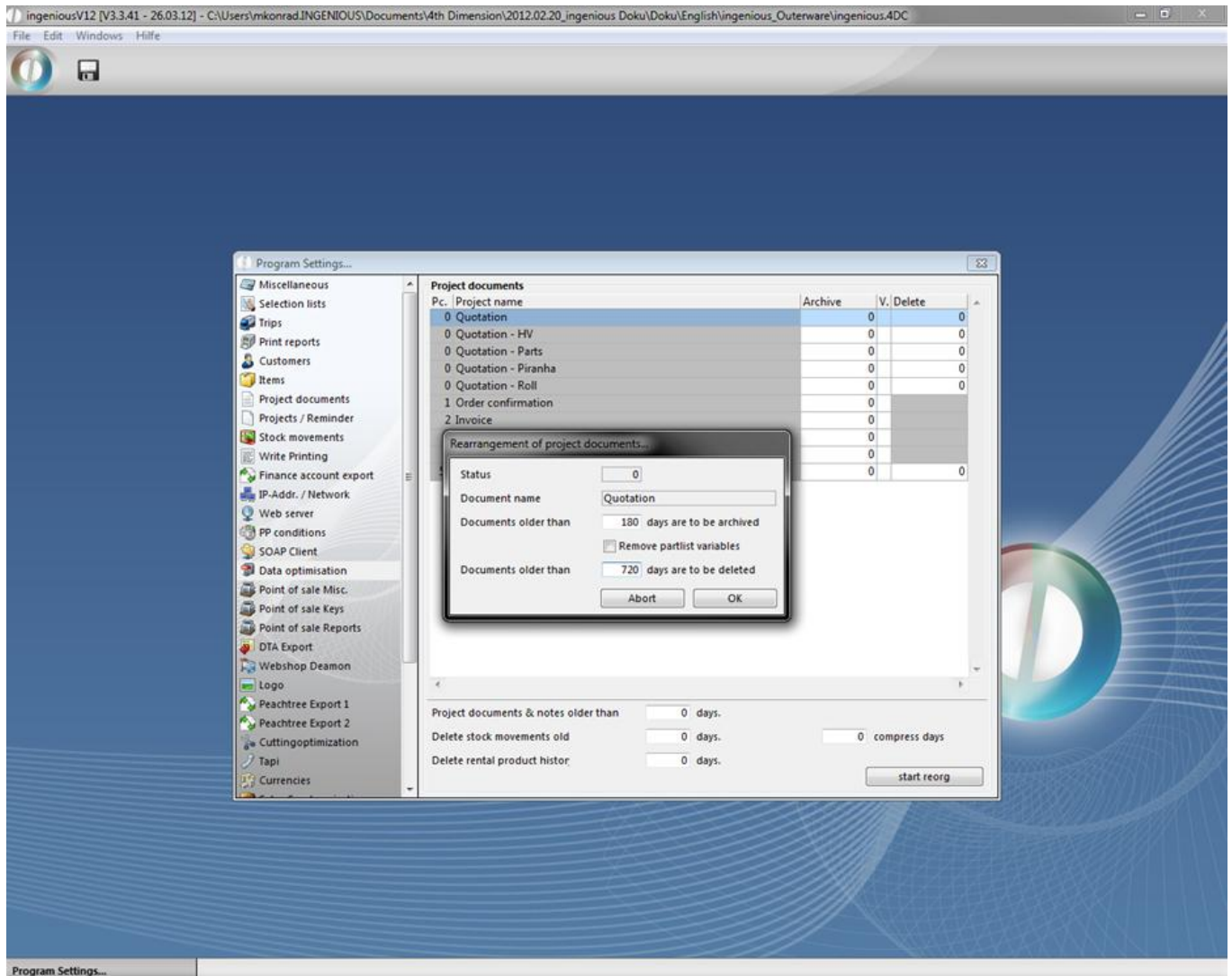
A dialog window opens where you can enter the matchcode of the designated supplier, or you can select his name with the  icon from the list of suppliers. You will receive the IP address and matchcode from the supplier. To delete the name of a supplier, check it and then click on the  icon.

6.1.16 Data optimization

Optimization of data only becomes necessary when the database becomes enormous and thus slows down the work with Ingenious.V12. In smaller and mid-sized companies, that will take years or may occur when outdated hardware is being used, or for example after the expiration of the legal storage time. In order not to delete old and/or unused project documents, you can determine which data can automatically be deleted in one cycle by using data optimization. Carefully select the time and delete only if you are certain that the data is no longer needed. Make sure that only authorized coworkers such as management or administrators have access to the program settings. All document models are included in one list and can be used by double-clicking.



In the template that appears, enter the number of days or until how far back the documents should be archived, or when they can be deleted. Confirm with "OK".

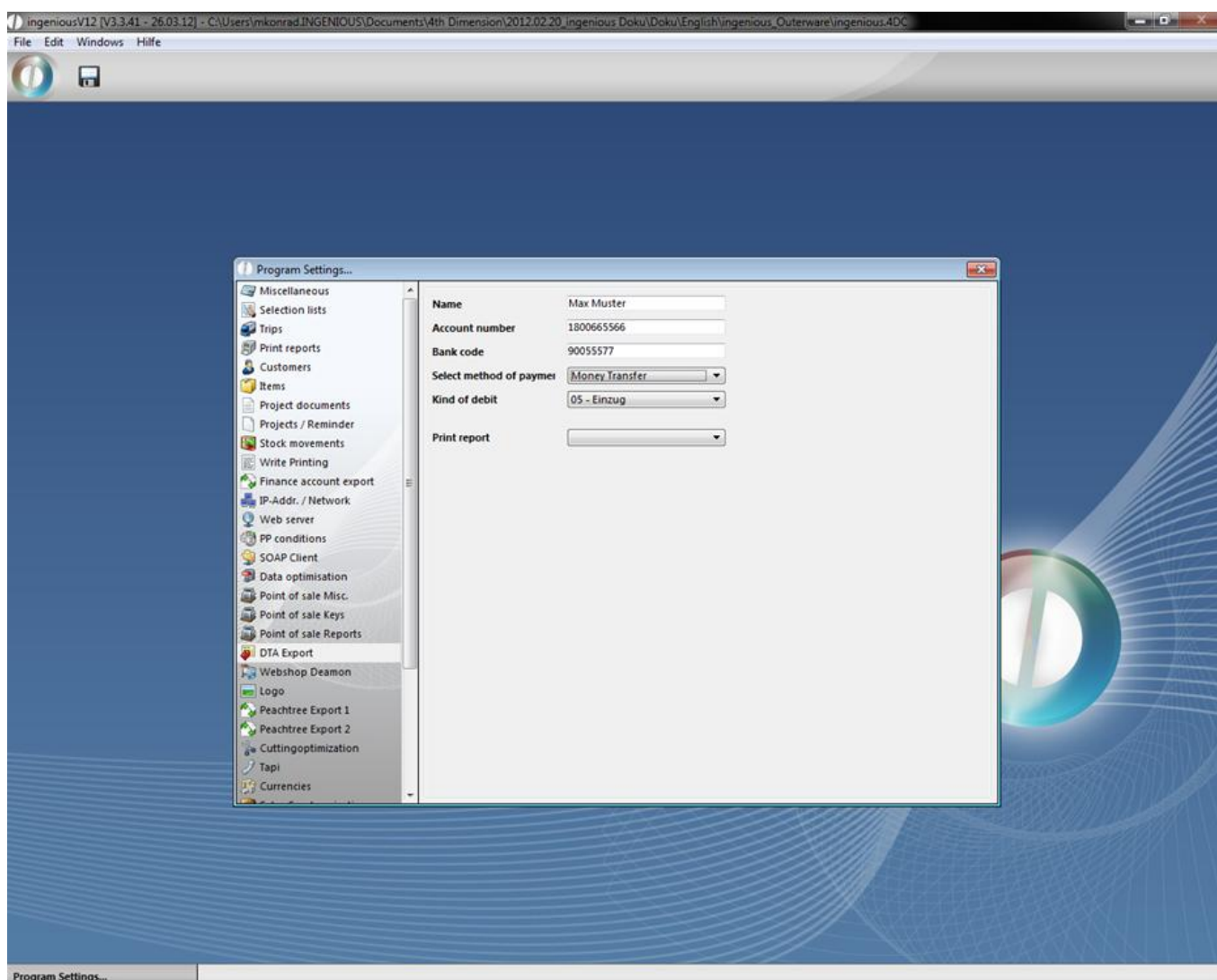


For safety reasons, the most important documents such as invoices should not be deleted but archived. The field for deleting is saved in grey and cannot be selected.


When you have entered the designated times for all documents and proofed them once again, click on the **start reorg** button to start the reorganization. A dialogue field will prompt you to decide if you really want to delete the data. Confirm with "OK" and stop the action.

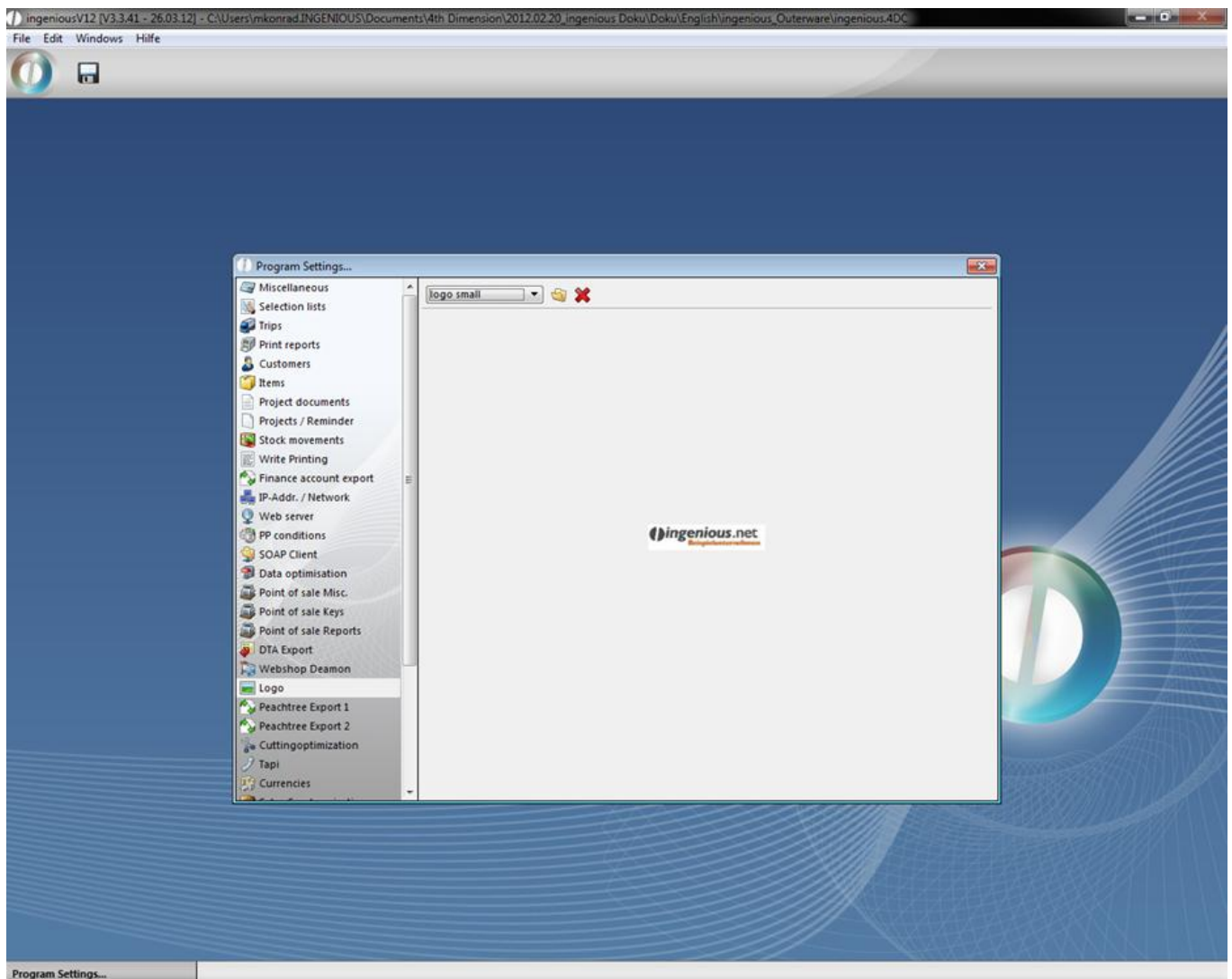
6.1.17 DTA Export

For DTA debit and document export, your account numbers will be stored at this point of the program settings.



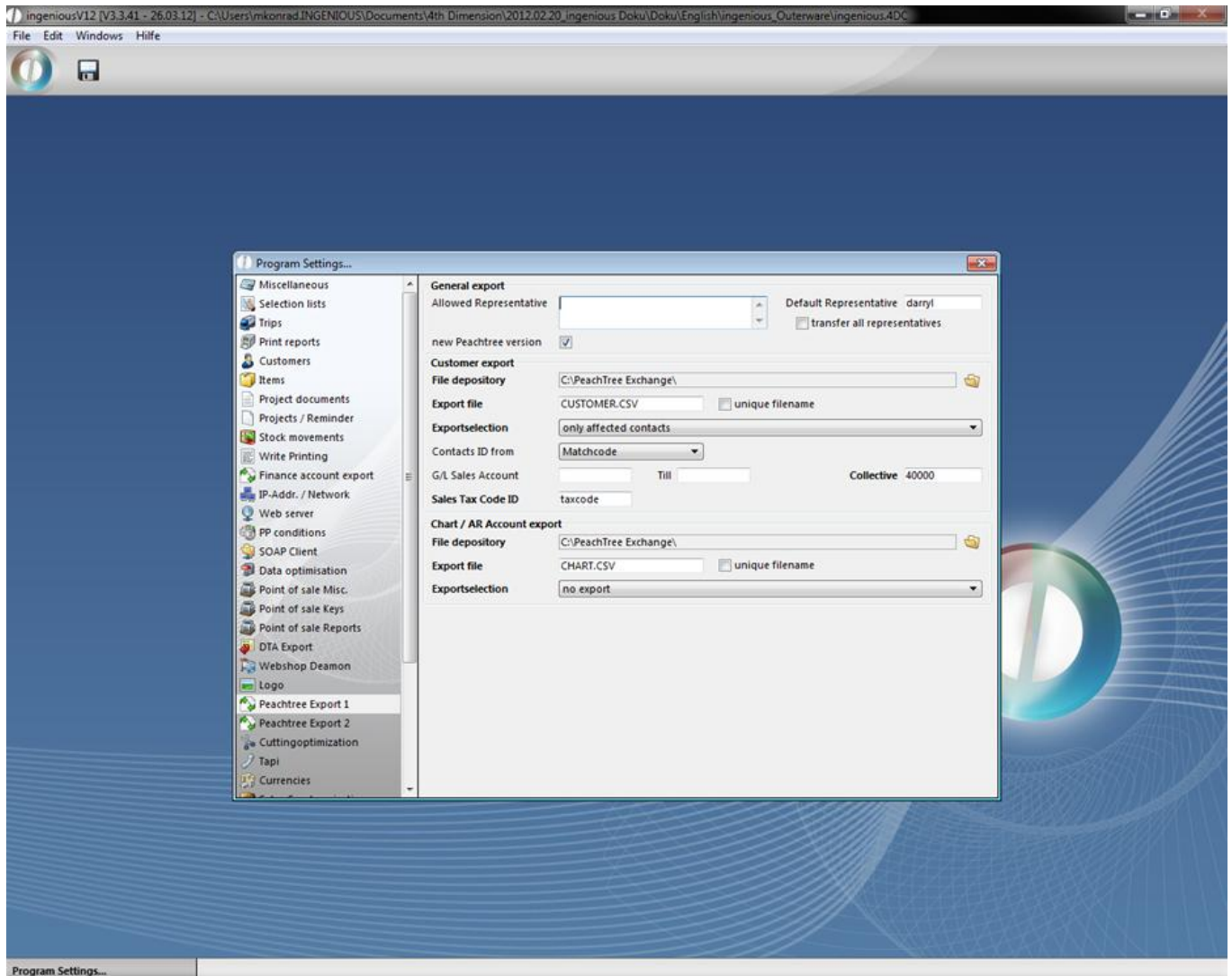
6.1.18 Logo

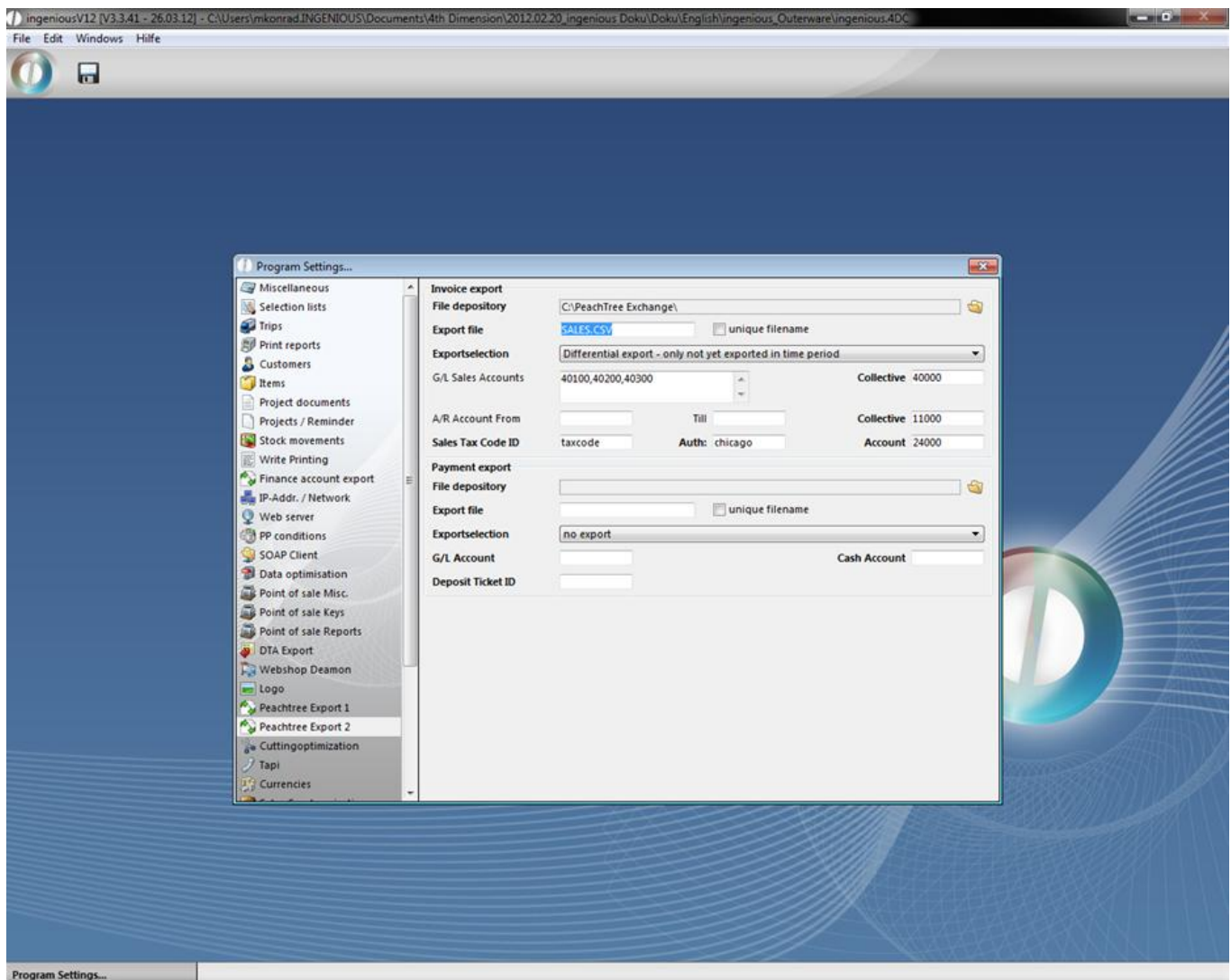
In this column, you have the possibility to insert and save two pictures of the logo (small and large) with the  button. You can link to the spreadsheets via placeholders ({GE_Logo_Small}) and {GE_Logo_Large}).



6.1.19 Peachtree export settings

In this column you will find all the settings for Peachtree functions. The menu items for configuration and export only are visible when one has the module rights as well as the export rights. The Peachtree Export interface consists of a contact export, an invoice export and an export for GL Sales / AR accounts. The default settings for the various export models found in this column will be described in table format as follows.





Area	Entry	Comments
Customer export	File depository	Target path, in which the Peachtree-contact file should be filed. The setting occurs by means of the button to the right of the text field.
	Export file	Information on the file name of the contact file: The file name "CUSTOMER.CSV" preset in Peachtree should be used.
	Unique export file name	This checkbox must be selected if the file should have a unique file name with every creation of a single file. The file name then has the form: Customer_JJJJMMDDSSMMSS.CSV.
	Export selection	Setting possibilities are "All contacts" / "Only contacts that apply". With the setting "All contacts", all contacts will transfer from the Ingenious database to Peachtree. With the setting "Only contacts that apply", only contacts are transferred to Peachtree that have final closed invoices or credits in a set time frame.
	Accounts receivable from ... to	In the fields, "Accounts receivable from" and "Debit account to", the parameter of the permissible debtors export accounts is given.

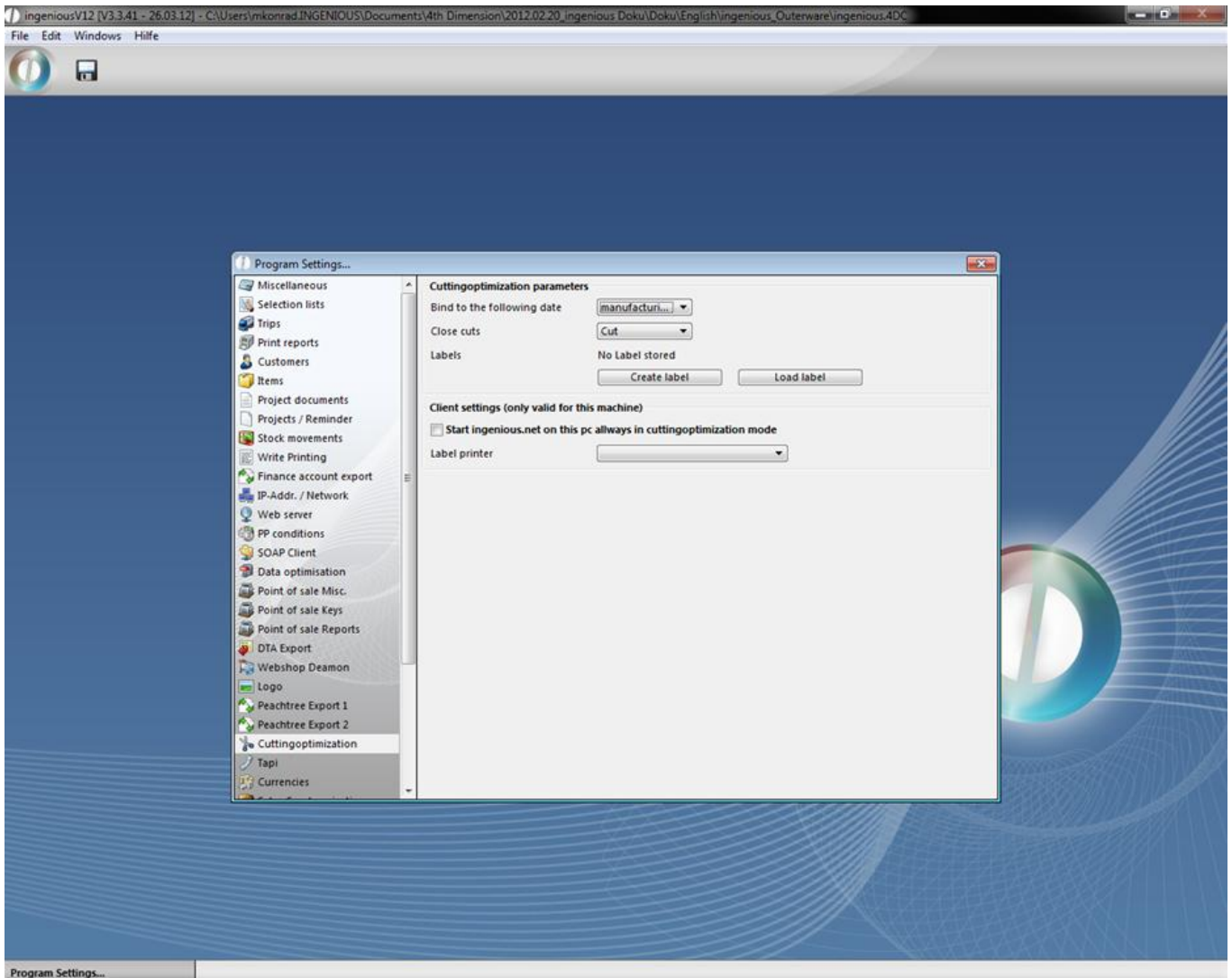
	...	If the accounts receivable number of a contact lies within the parameter, the accounts receivable number will transfer as a GL Sales (Sales) account of the Peachtree contact. With the import, the GL Sales Accounts have to be created in Peachtree.
	Customer collective invoice	If the accounts receivable lies outside the parameter "Accounts receivable from" – "to" or if it is not assigned to an accounts receivable account number, the collective account will transfer over for this contact as a GL Sales (Sales) account. The preset standard value in Peachtree is "40000" at most.
	Sales tax code ID	In the Sales tax code ID field, the sales tax ID that is preset in the Peachtree ID must be entered. This ID will transfer for all customers and determines the sales tax rate.
Invoicing export	File attachment	The target path in which the Peachtree invoicing file should be filed. The setting occurs by means of the button to the right of the text field.
	Export file	Information on the file name of the invoicing file: The file name preset in Peachtree "SALES.CSV" should be used.
	Unique export file name	This checkbox must be selected if the file is to have a unique file name with every creation of a single file. Then the file name has the format: SALES_JJJJMMDDSSMMSS.CSV.
	Export selection	Setting possibilities are "Complete export – all in a time period" / "Difference export – not yet exported in the time period". With the setting "Complete export" – all in the time period" all closed invoices and credits are exported that lie within the timeframe provided. With the setting, "Difference export – not yet exported in the time frame" only closed invoices and credits are exported that lie within the given time frame, but that were not exported before.
	Permissible article accounts	In the permissible article accounts field, a list separated by a comma can be given by Article-FIBU proceeds accounts. These account numbers will transfer together with the invoicing positions as a GL sales (sales) account number. With the import, the GL sales accounts must be created in Peachtree. The export of the articles proceeds accounts to the positions is optional.
	Standard article account	If the FIBU proceeds of an article is not shown in the list of the permissible article accounts, or if no accounts receivable account number is assigned to the article, then the collective account will transfer for this position as a GL Sales (Sales) account. The preset standard value in Peachtree is mostly "40000". The export of the article proceeds account for the positions are optional.
	Accounts receivable from ... to ...	In the fields, "Accounts receivable from" and "Debit account to", the parameter of the permissible debtors export accounts is given. If the accounts receivable number of a contact lies within the

		parameter, the accounts receivable number will transfer as a GL sales (sales) account (accounts receivable) of the Peachtree contact. With the import, the GL sales accounts have to be created in Peachtree.
	Accounts receivable collective invoice	If the accounts receivable lies outside the parameter "Accounts receivable from" – "to" or if an accounts receivable number is not assigned to a project, the collective account will transfer as a GL sales account (accounts receivable). The preset standard value in Peachtree is "11000" at most.
	Sales tax code ID	In the sales tax code ID field, the sales tax ID preset in Peachtree must be entered. This ID will transfer for all invoices and is fixed at the recalculation of the sales tax rate.
	Sales tax code authority ID	Every sales tax code can exist of several partial tax rates in Peachtree. Each one of these partial tax rates is given by an authority ID and is bound to the tax code ID. With Ingenious.V12 Peachtree Export version 1.0, only one authority ID can be transferred.
	Sales tax code account	Every sales tax code ID is assigned to a G/L account.
CHART / AR Account Export	File depository	The target path in which Peachtree Export files are to be saved. The settings occur by means of the button to the right of the text field.
	Export file	Information on the file name of the export file: The file name preset in Peachtree "CHART.CSV" should be used.
	Unique export file name	This checkbox must be selected if the file should have a unique file name with every creation of a single file. Then the file name has the format: CHART_JJJJMMDDSSMMSS.CSV.
	Export selection	Setting possibilities are "GL sales accounts of all customers" / "GL sales account of customers that apply" / "GL sales account and AR project accounts" / "GL sales account and AR accounts of customers and projects from a time period". With the setting "GL sales account of all customers" the accounts receivable numbers of all customers are exported. With the setting "GL sales account of affected customers" the accounts receivable numbers of all customers who show closed invoices or credits in the set search period are exported. With the setting "GL sales account and AR project accounts" the proceed accounts of the projects and the FIBU proceed amounts of the selected articles are exported. With the setting "GL sales account and AR accounts of customers and projects from a time period" the accounts receivable numbers of all customers, the proceed accounts of the projects and the FIBU accounts of the selected articles are exported. (Summary of two previous items).

Export General	Allowed representatives	In the allowed representatives field, a list separated by a comma can be given of the representatives who should be exported with the projects / contacts. During the import, these representatives must be created as a sales rep (employee).
	Standard representative ID	If a representative is not included in the list of the permissible representatives, or is not assigned to a project / contact, the standard representative will be transferred instead. The export of the representatives is optional. If no representatives are added in Peachtree, both fields – permissible representatives and standard representatives must be empty. In this case, no representatives are transferred.
	All representatives transferred	If this checkbox is selected, all representatives are listed in the contacts or the projects. The fields "Permissible representatives" and "Standard representatives" are ignored.
	New Peachtree version	Newer Peachtree versions (i.e. Peachtree 2007) require an expanded export file. The standard export for Peachtree version 7 is not sufficient for an import.

6.1.20 Cutting optimization settings

Here you find the settings for cutting optimization with a touch screen. This column will only be displayed when all the user rights regarding cut optimization are activated. In the field, "Link to the following date" you can establish which appointment- specific project should be listed (meaning appointments listed in the project detail view). When the option "Printed on" is selected, all appointments specified within a certain time period will be listed. In the area "Close layout" you can select options "Cut" and "Label" or "Cut and Label". Here you specify the date when the article will no longer be displayed in the cutting optimization. With the "Create label" button, you can create your own label, and with the "Load label" button, you can load an already existing label. In addition, you have the possibility to program the printer to print labels. When you checkmark the field "Always start Ingenious.V12 on this computer in the cut optimization mode", the cut optimization mode opens at the start of Ingenious.V12 in full Screen-/Touch screen mode. Otherwise, you can get to this mode when you press and hold the Alt key and then click on cut optimization in the menu.

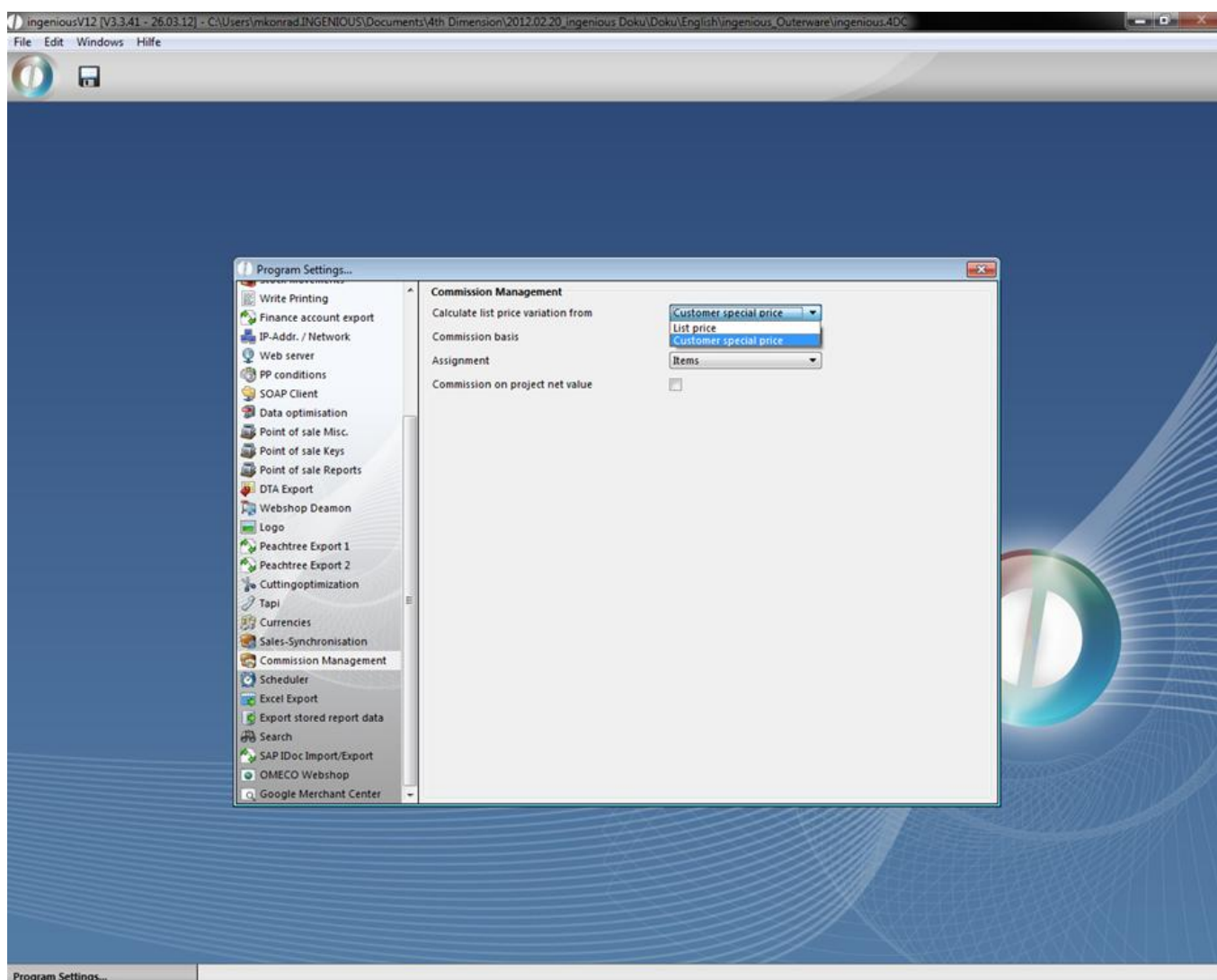


6.1.21 Commission management settings

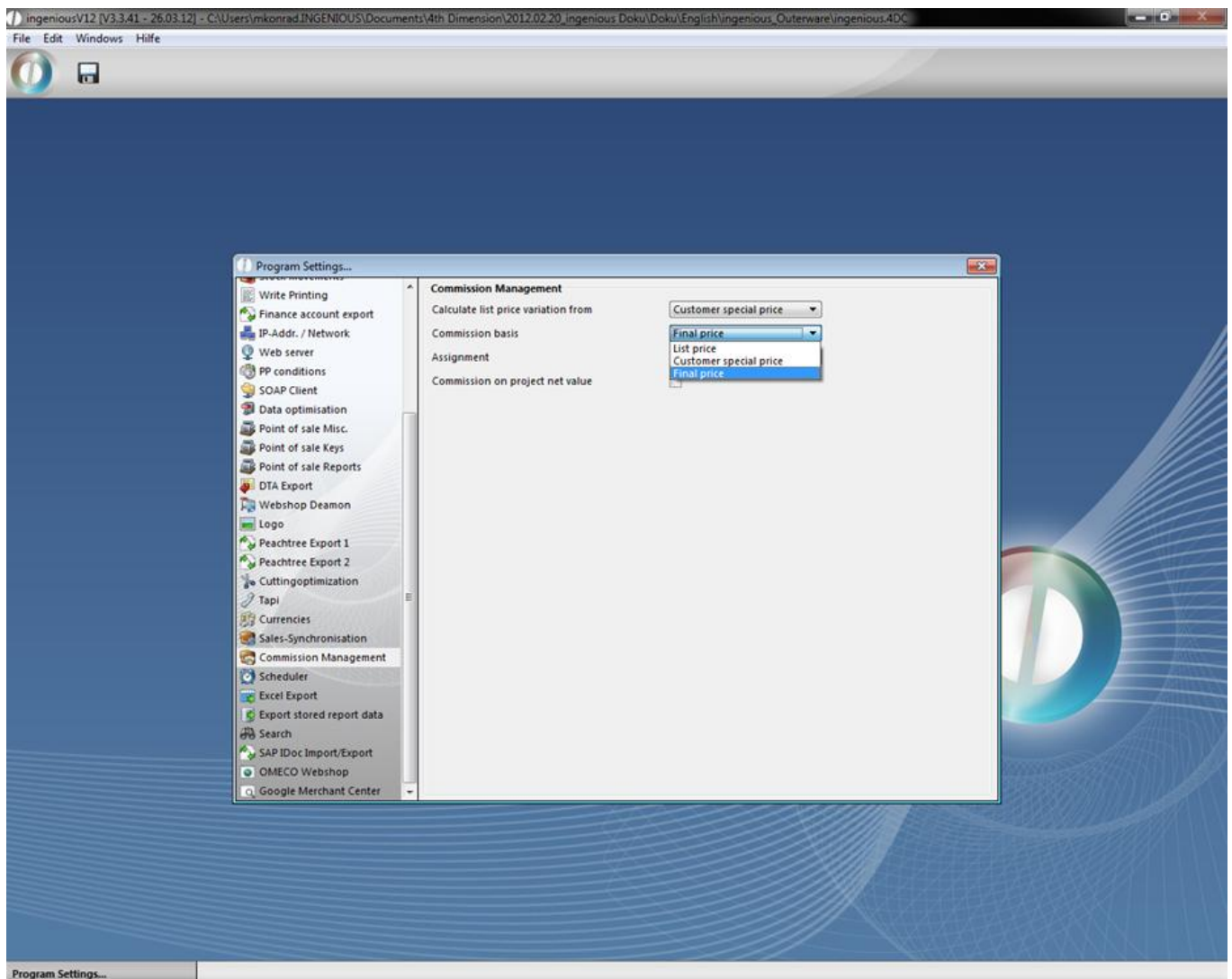
So far the commission was calculated by the following model:

- Catalog price variance based on the customers individual special price
- Selection of the rate of commission by means of the representative, the commission group bind to the item and the catalog price variance
- Calculation of the commission with the rate of commission and the final price of the item

A new category was added to the program settings, where you can modify this calculation. For the calculation of the catalog price variance you can choose between the list price assigned to the item and the special price assigned to the contact.



The basis of commission can be the list price, the individual customer special price or the actual final price.



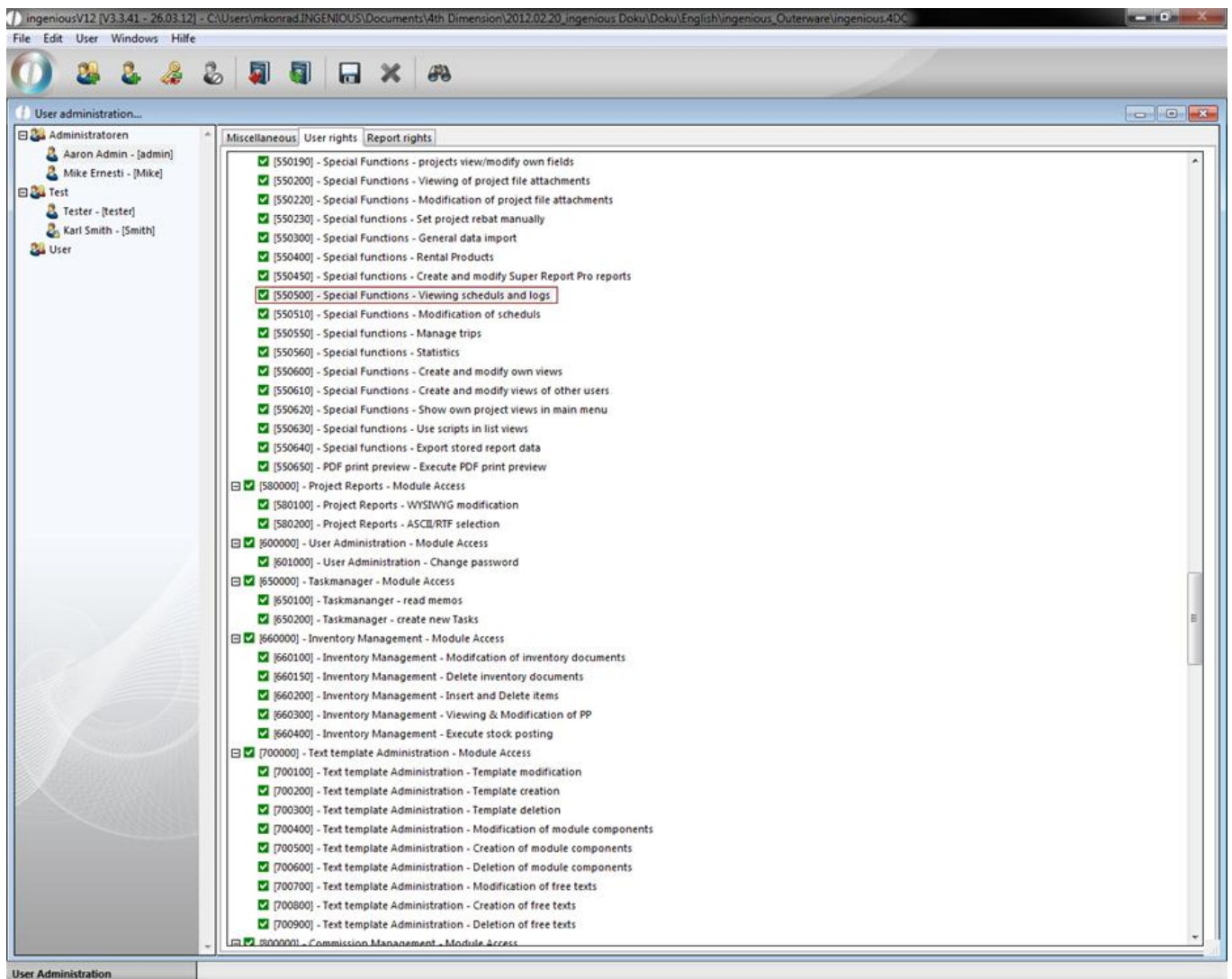
If you want to keep the usual calculation, you have to make the following settings:

- Calculate the list price variance from the individual customer special price
- Commission basis is the final price

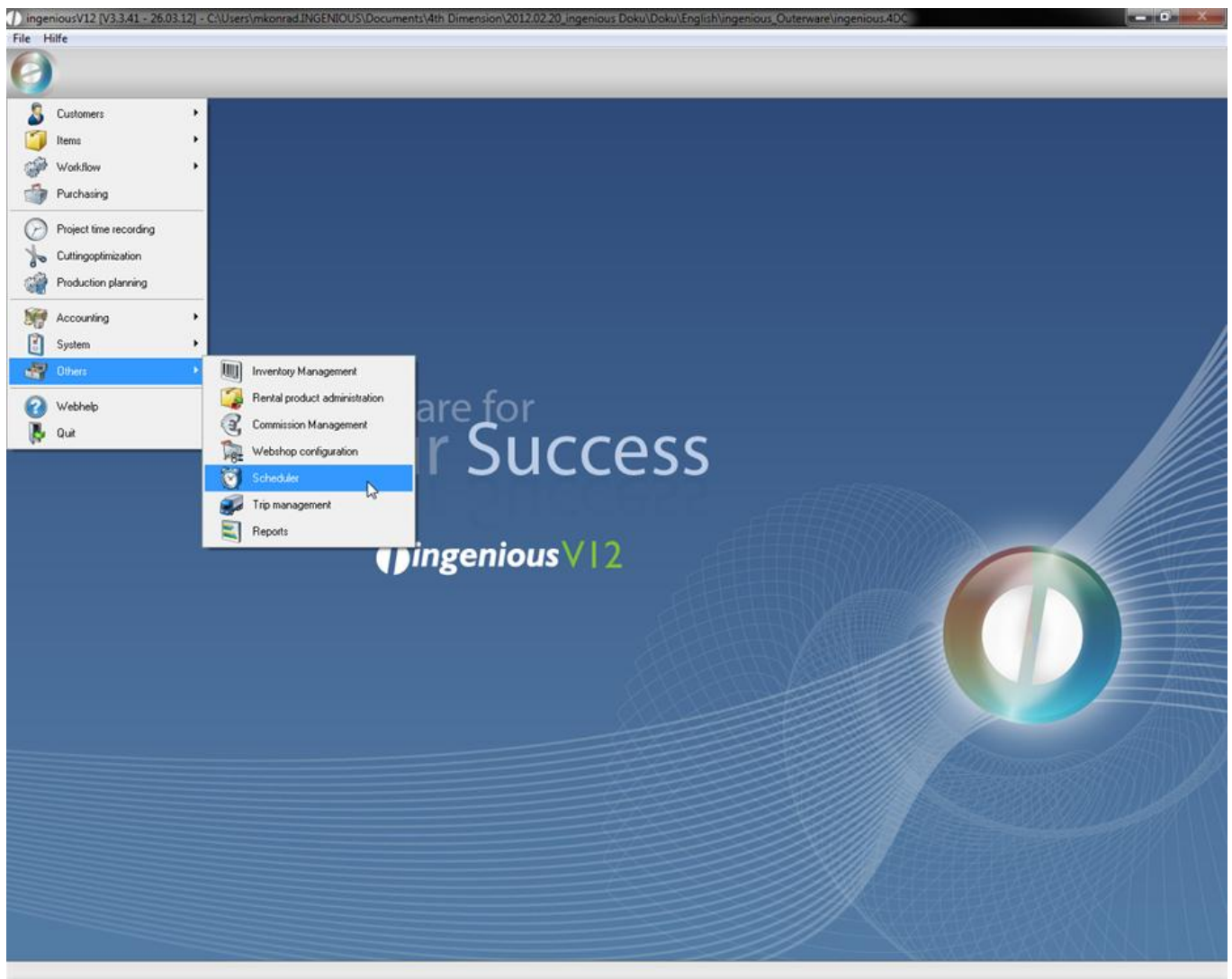
These settings are set by default, when you update to the new version.

6.1.22 Scheduler settings

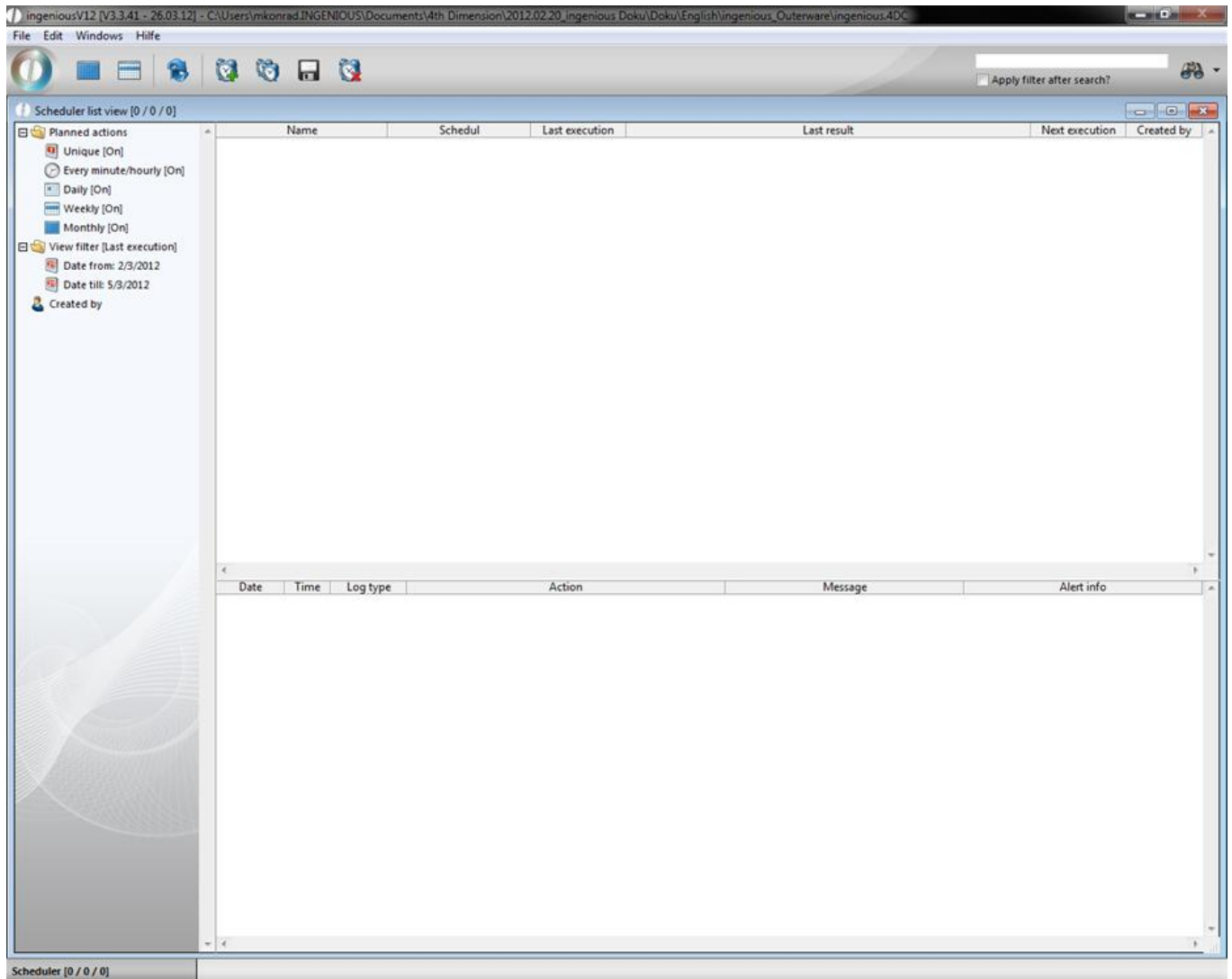
The scheduler is a new module for the execution of automatic, time controlled scripts. To be able to use the module, you have to have the specific license and the required user rights have to be enabled.




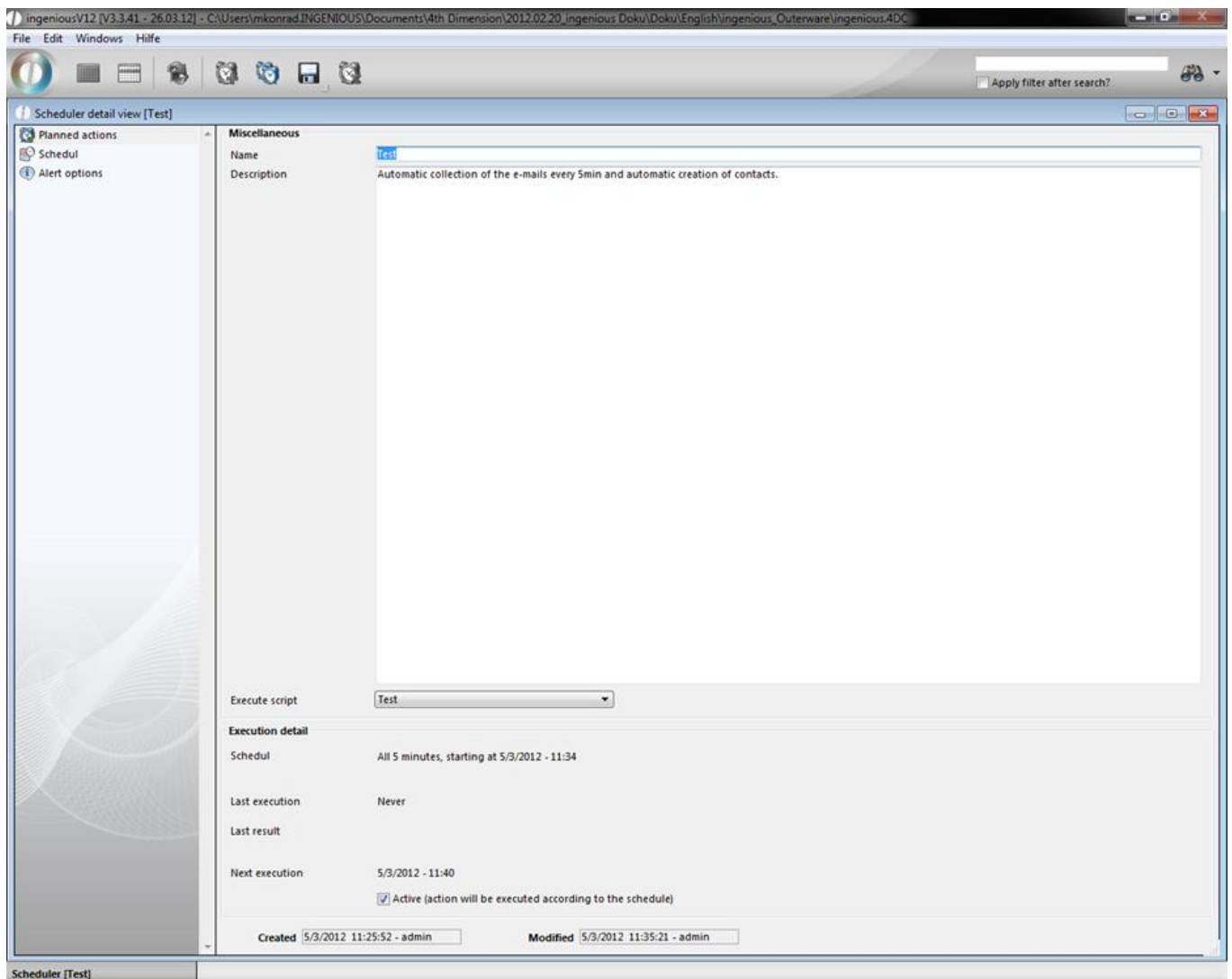
Then the scheduler is listed in the main menu in "Others".



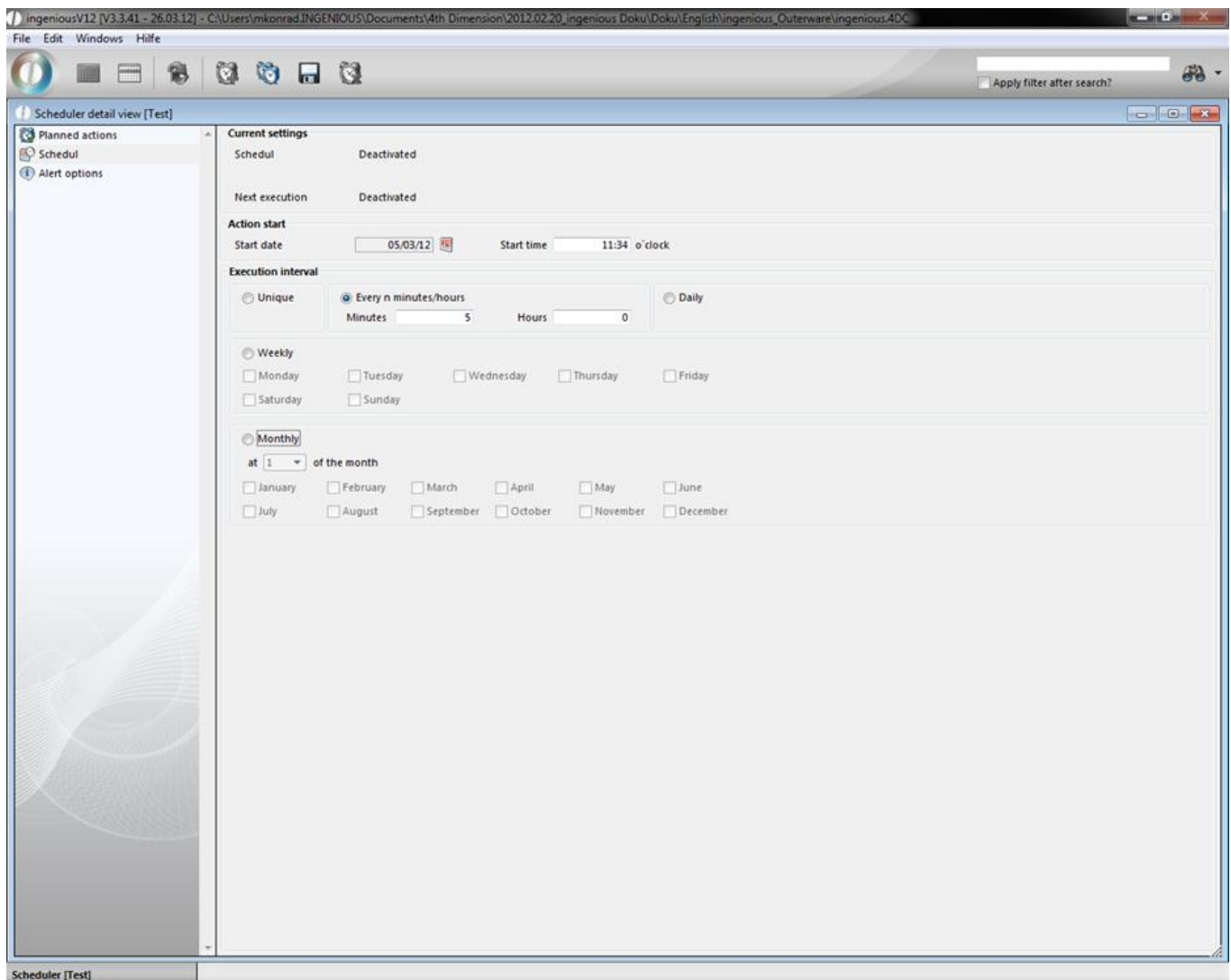
When you click on scheduler a list view will open up where all of your current controlled scripts are listed. In the selection area you have several filter functions. In the bottom area you see log entries with action start, action end, and the result of the script execution.



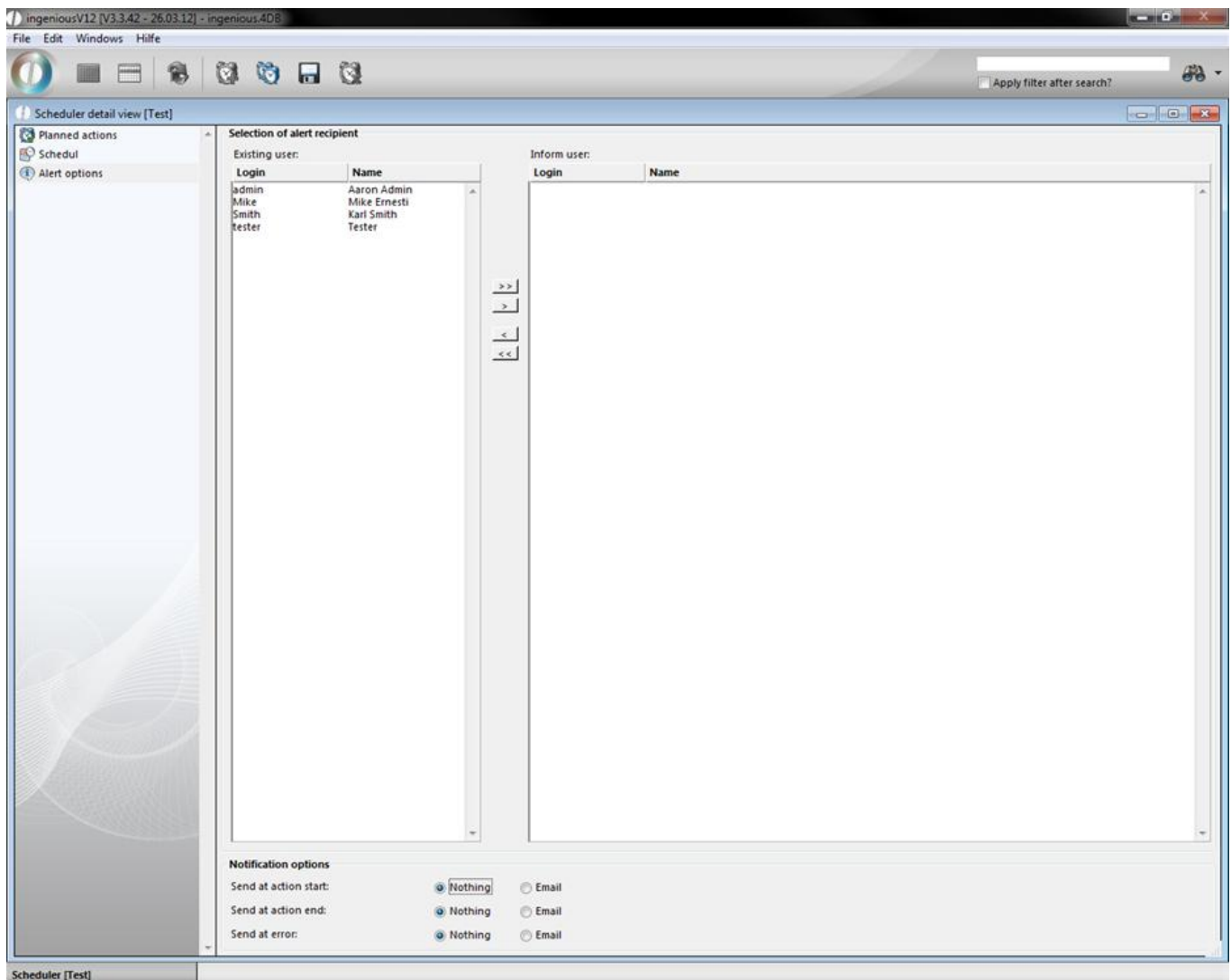
A new action can be added by clicking  and modified by double clicking it in the list view. This will open up the scheduler detail view. In the category “planned actions” you can enter name and description of the action. In the pop up field “Execute script” you choose the desired script that will be executed. The listed scripts are deposit in the free data manipulation in the stored procedures. In the displayed example a script should be executed, which collects e-mails and possibly creates a new contact. The employees of the Ingenious GmbH will help you will be happy to help you with the creation of individual scripts. In the bottom area you find the details of the execution of the action (schedule, result, time of the last and the next execution). The settings for the schedule you define in the next same-named category.



Here you can define the action start date with date and time and the execution interval of the script. In this example the scrip execution should happen every 5 minutes.

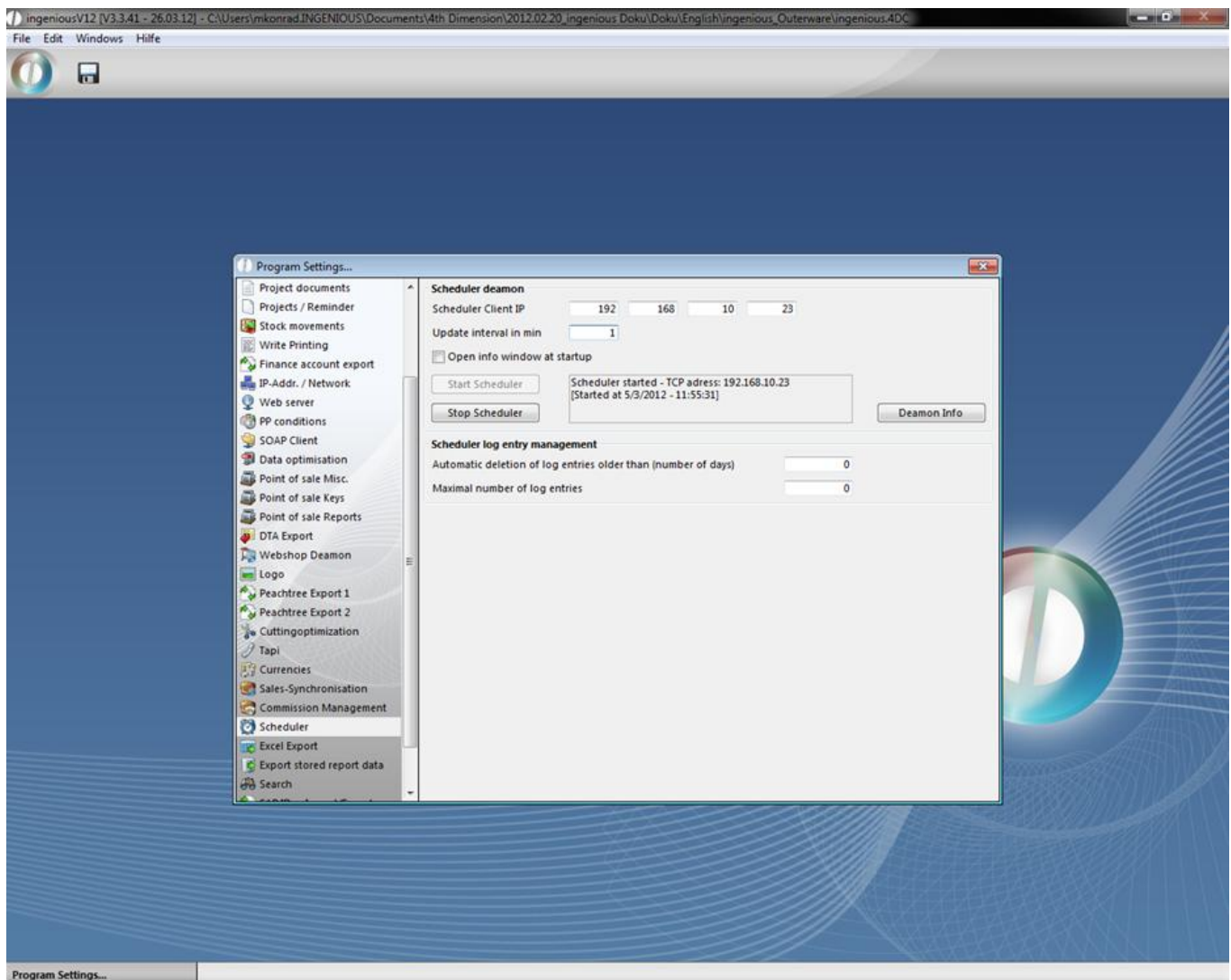



In the category “Alert options” you have the opportunity to let one or more users be notified per e-mail when an action starts, ends or the execution was not successful.

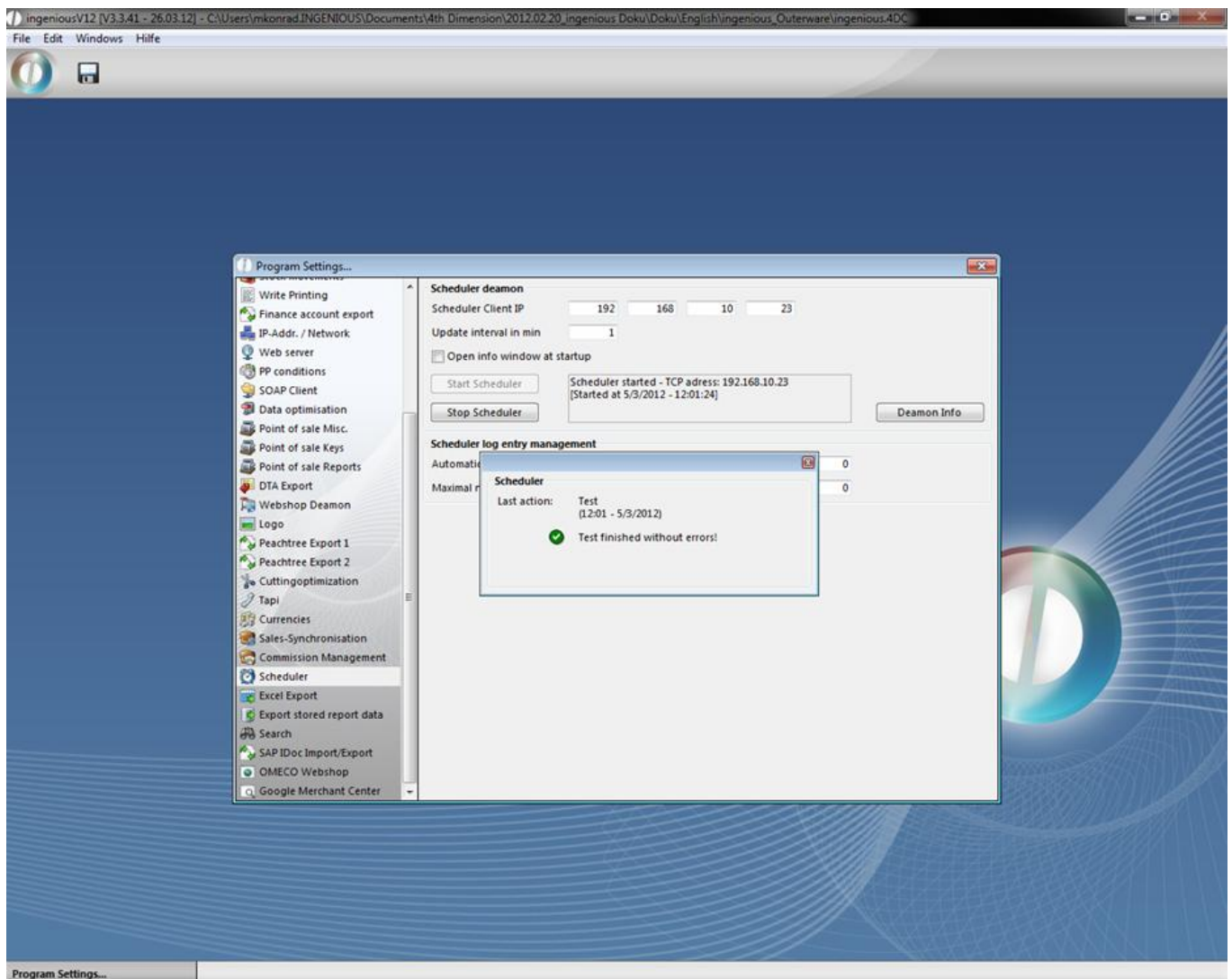


Further configurations for the scheduler you can set in the program settings. Here you define the IP of the client, for whom the script should be executed. Besides Ingenious.V12 can display an information window, which will be opened on every start and update it every x minutes. If necessary you can stop and restart the scheduler in the program settings. In the log entry management you can set the number of maximum displayed log entries and the time when the will be deleted.

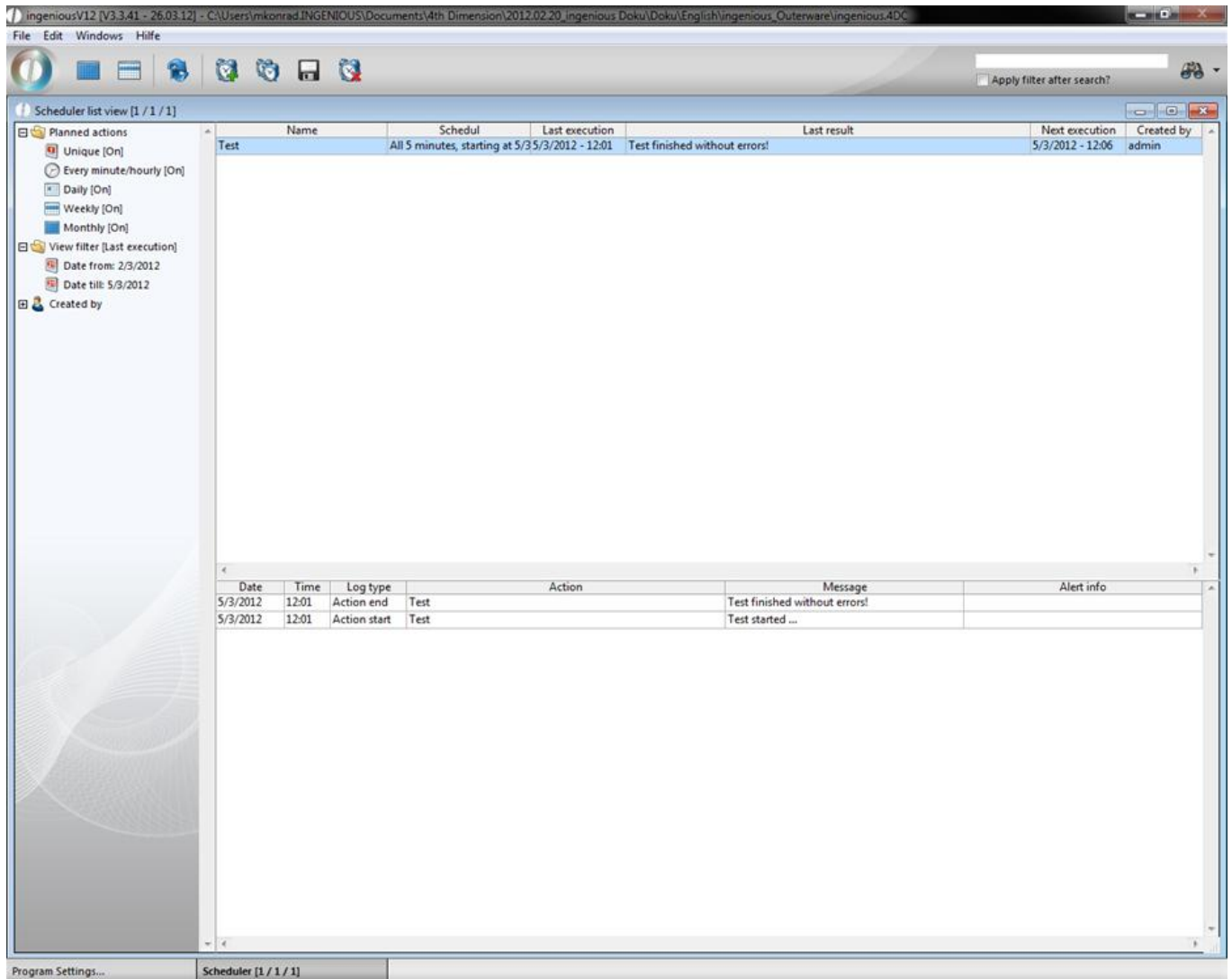
In the program settings, you will find three columns for the organization of the point of sale operation: "Point of sale general", "Point of sale keys" and "Point of sale reports", where you can deal with the desired walk-in customer and the appropriate point of sale settings. In the case that the three areas are not displayed in your settings, you must clear all point of sale rights for your user in the user administration.



When you click on the button  the information window of the scheduler with the details of the current action will be displayed.



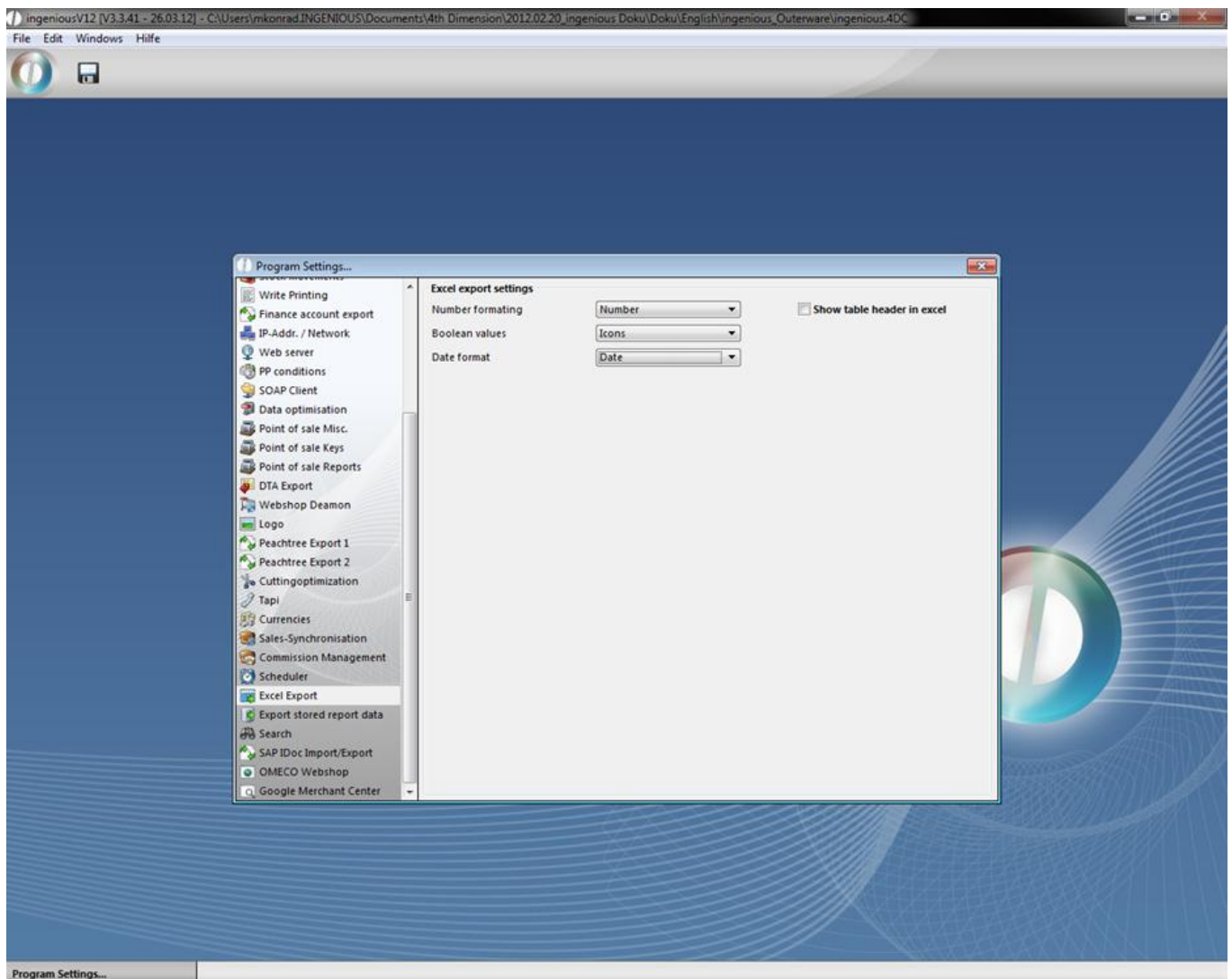
Also in the scheduler the new actions are noted.



6.1.23 Excel export

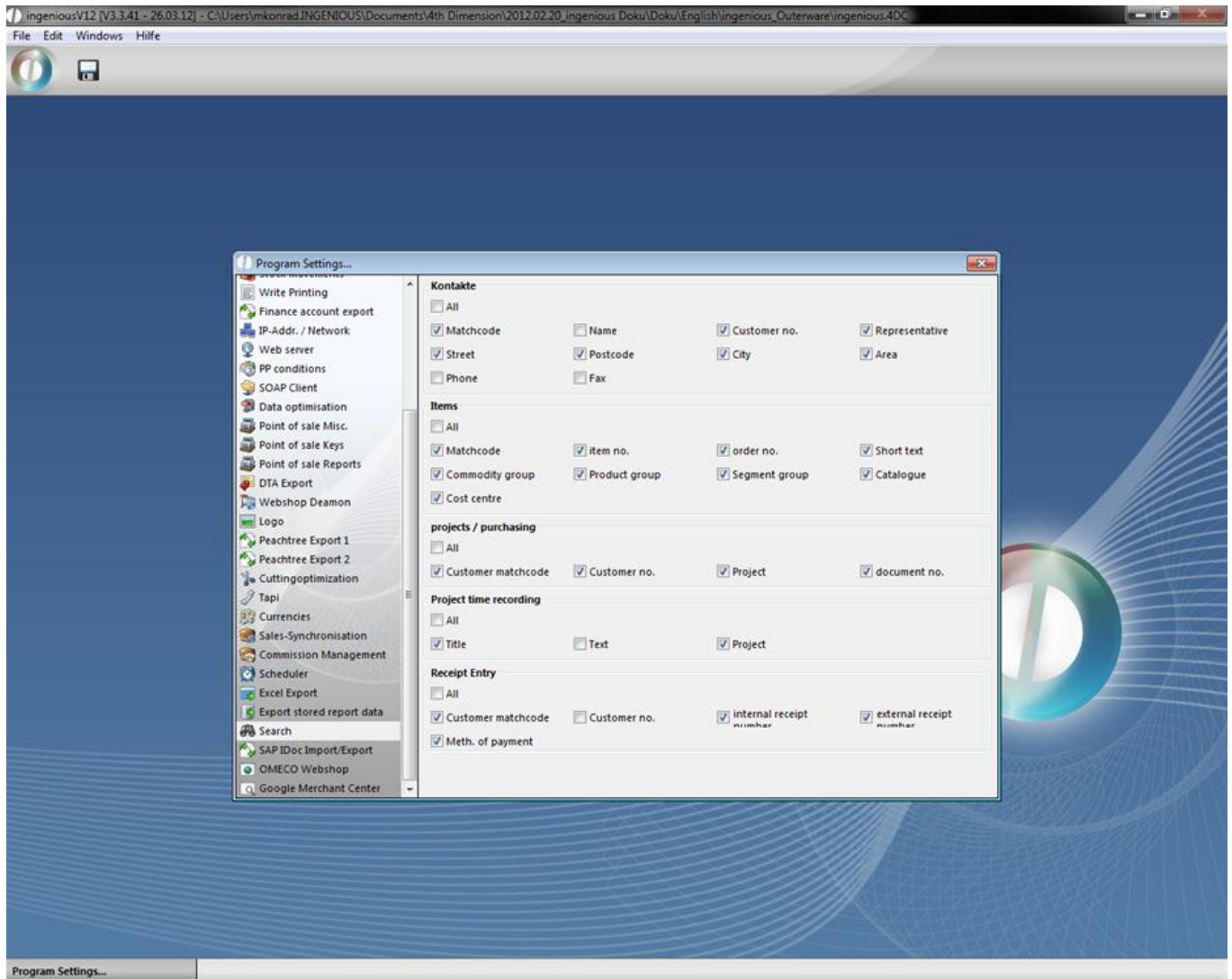
In the program settings in the new category "Excel Export" you can define, how the data will be exported to excel. When you enable "Show table header in excel", the column headers like document number, commission, etc will be added to the excel table. Additionally you can define the output format of numbers, boolean values and dates.

- Number formatting: number or text
- Boolean value: icons, true/false or 0/1
- Date format: date or text



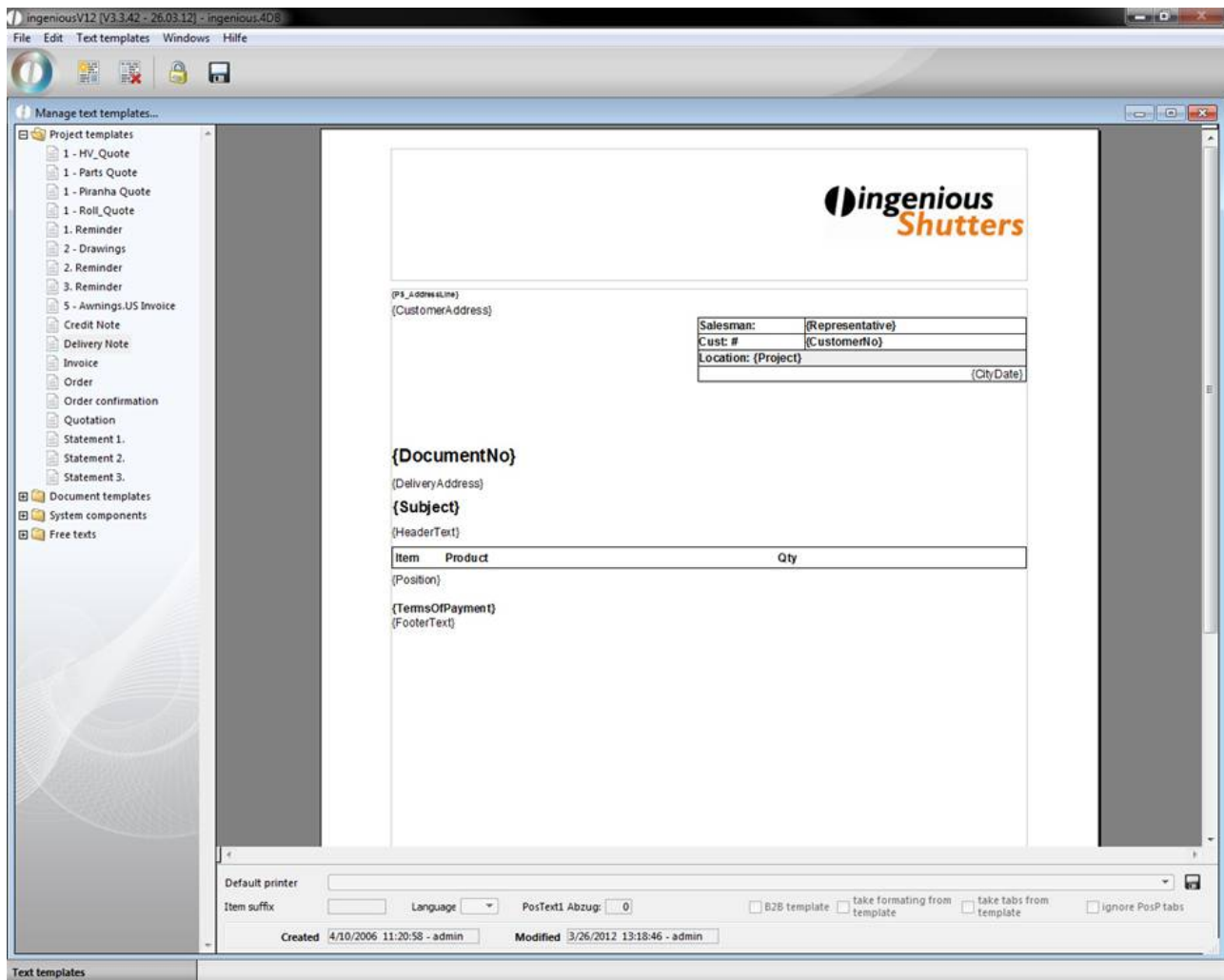
6.1.24 Search settings

In the program settings in the category "Search" you define, which field the fast search function should request.



6.2 Text template administration

The text administration module is one of the most efficient tools that Ingenious.V12 makes available to you. Text modules can be written out as abbreviations, text segments or even whole documents. These "Modules" are completed texts that one can use with a click. In some text modules, placeholders are included that stand for a variable content. For instance, one can enter the date in a text module or a document with the placeholder. In this way, the document always contains a current date (according to the computer calendar). The text modules are divided into four groups: Project templates (text modules as a complete project document with already integrated placeholders), document templates (text modules as a complete document with already integrated placeholders), system components (text fragments with integrated placeholders) and free texts (text modules for header and footer with integrated placeholders).

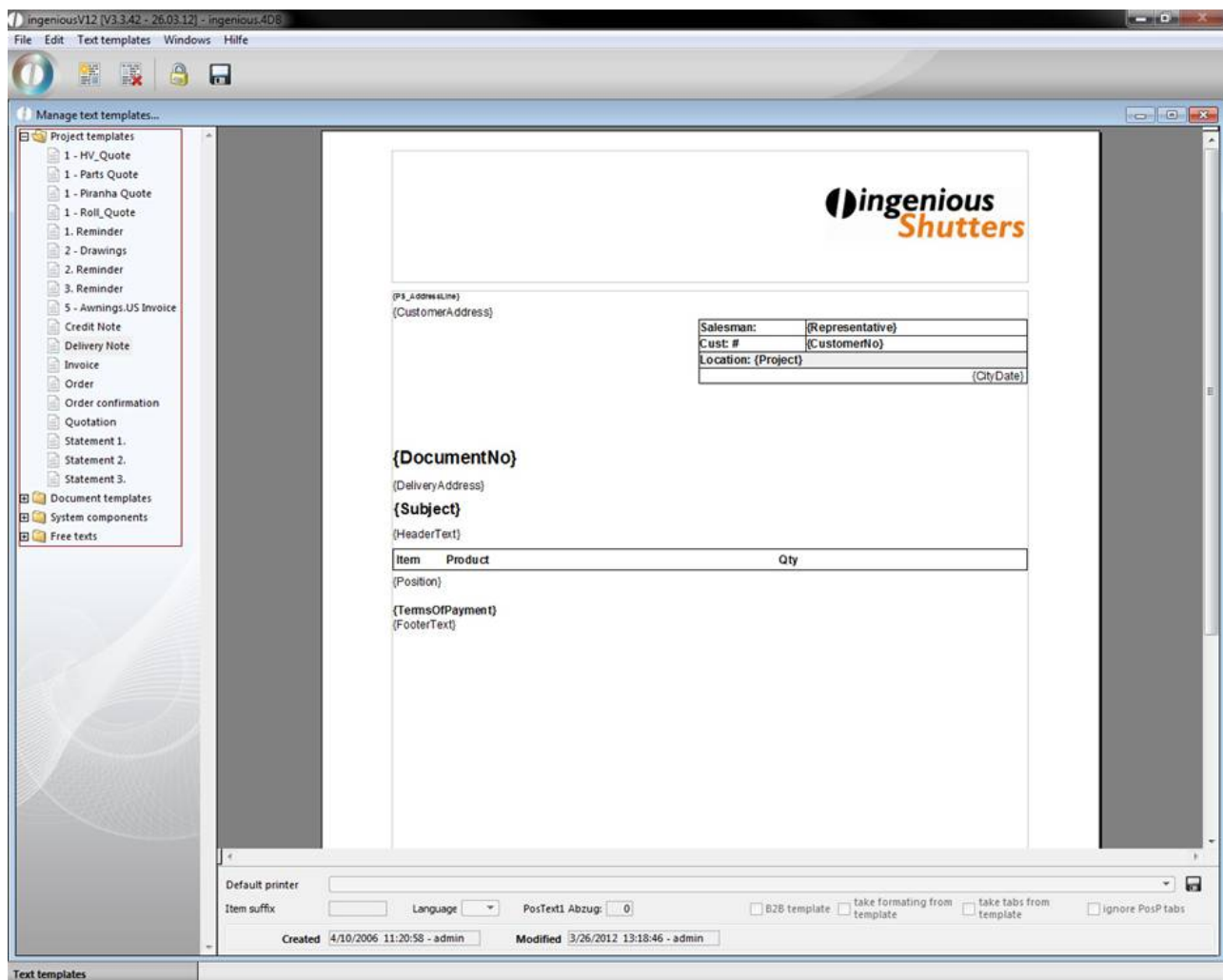


Placeholder

In short, placeholders stand for variable contents of texts that appear only on the printout of the document. This is how the placeholder stands for example "{address}" for the address data (street, postal code and city) of the current record. Placeholders are recognized by the brackets "{...}" which encompass the placeholder name.

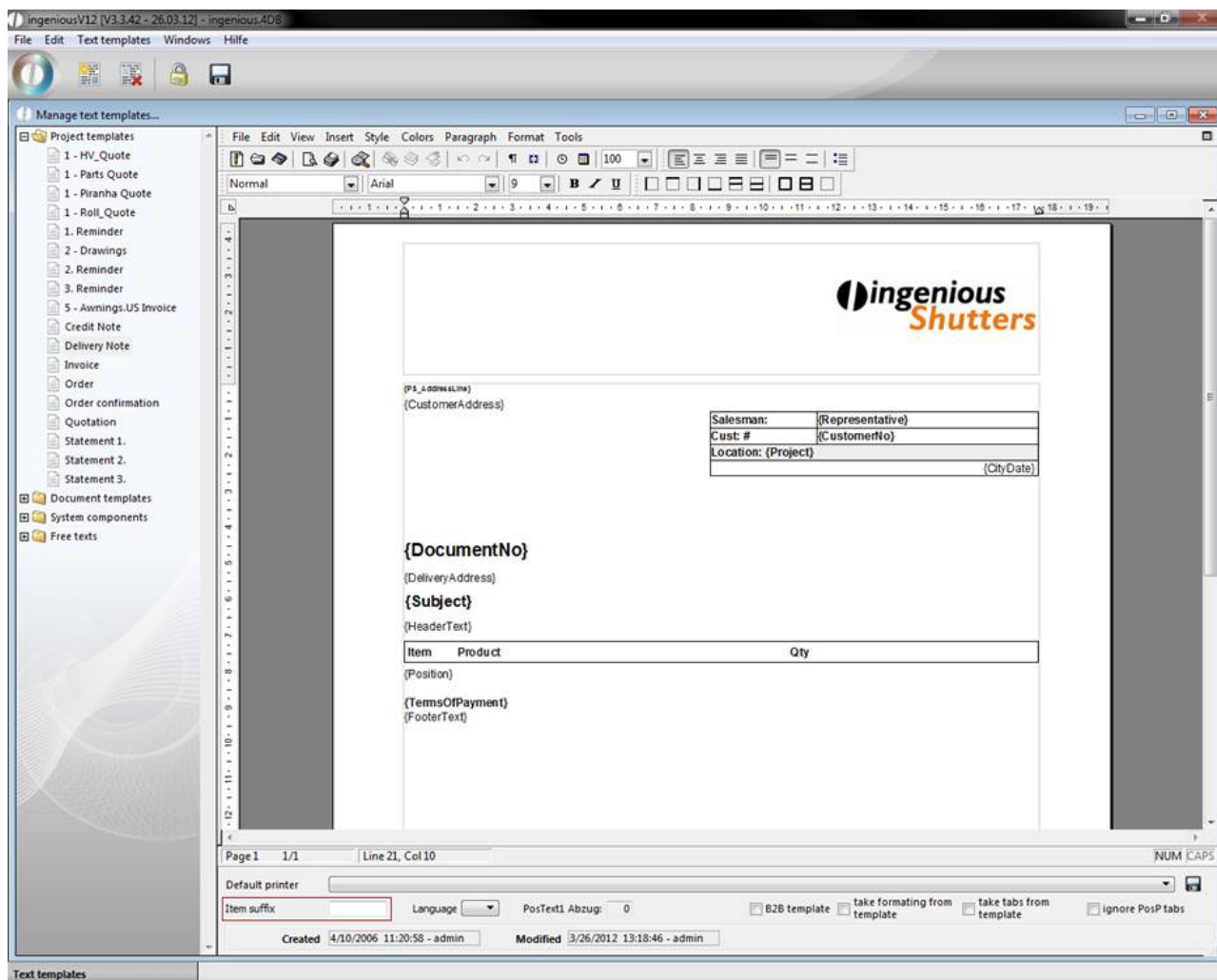
Project templates



The folder "Project templates" contains all templates relevant for a project, such as reminders, quotations, invoices, credit notes, etc. These templates are prefabricated, fully useable documents that find their application in the workflow modules. Also at this point, you have new possibilities to adapt the print templates according to your individual wishes.

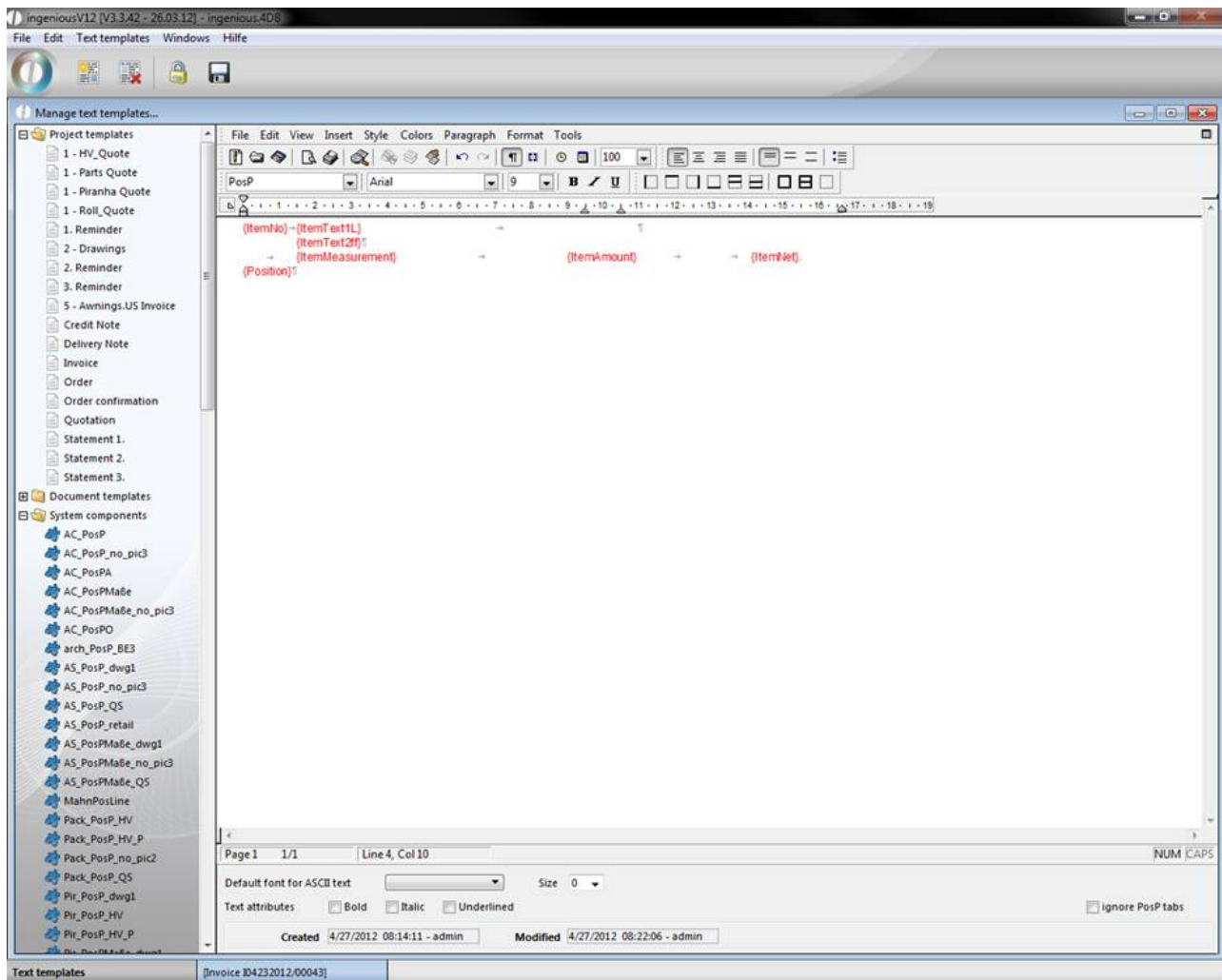


Item format suffix

In the "Pos. suffix" field next to the preset endings, you can define: _OC for order confirmations and _DN for delivery notes and individual suffixes for special items or system modules.

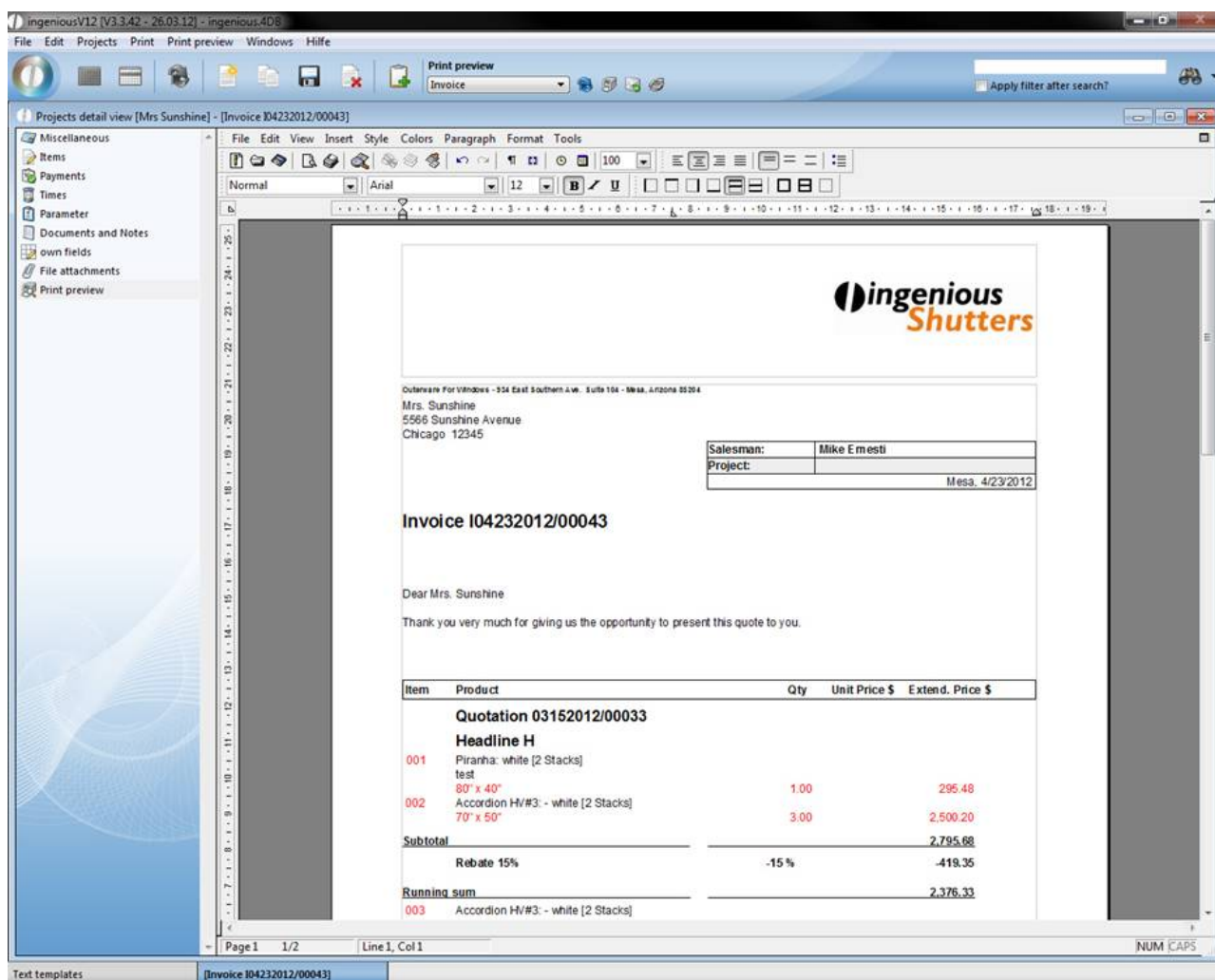


Now the approach is briefly shown in the following. Go to the column "System modules" and create a new system module "PosP_CN" with the  icon. You can copy the contents of the "PosP" module as a presentation and change it as you desire. In order to be able to work on text modules, simply click on the  icon. In the example shown, the font will be shown in red and the {ItemPSP} information is omitted.



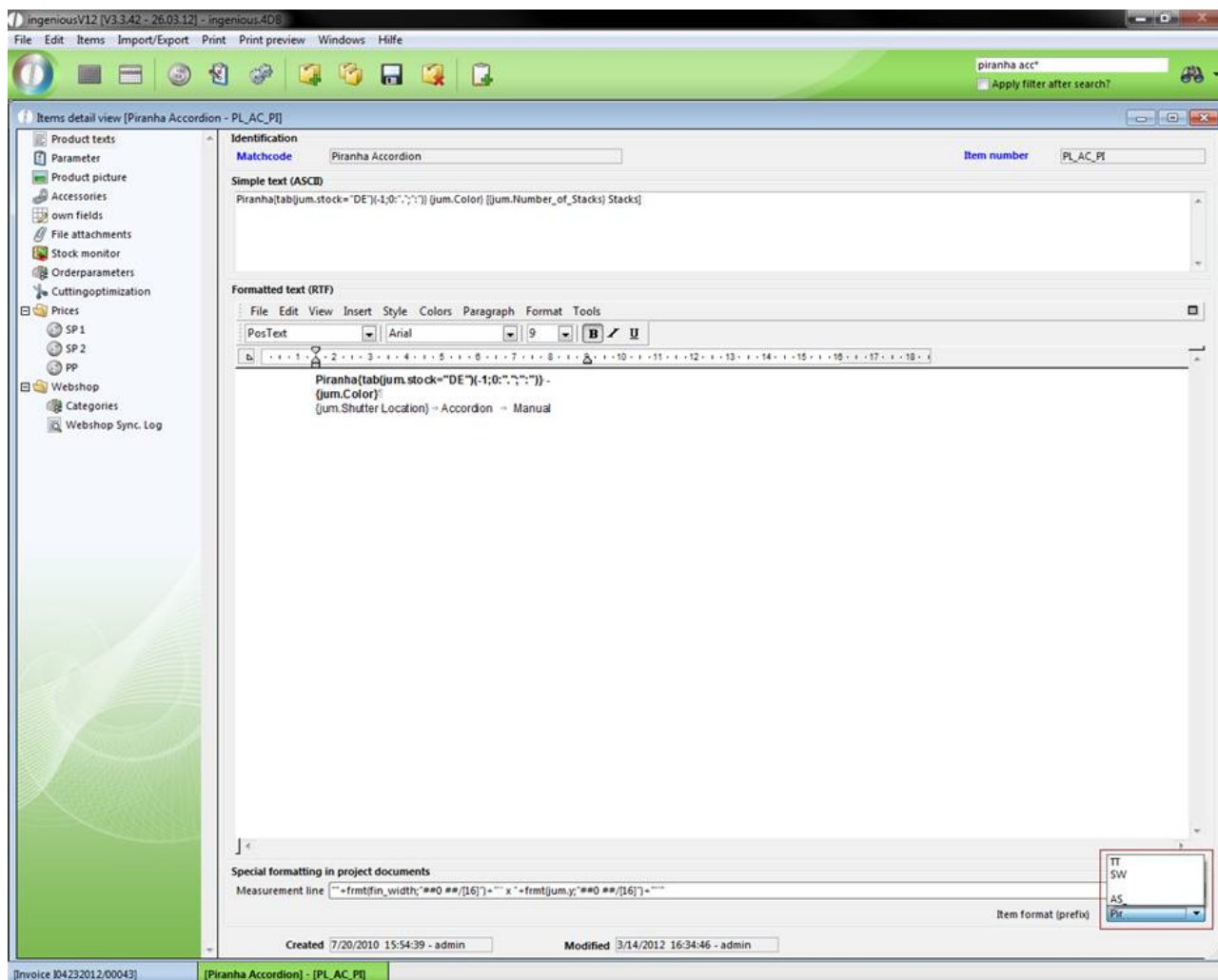
After the change is made, you save the module and switch to the "Project templates" column. Open the credit note template and simply enter "_CN" in "Pos. suffix".

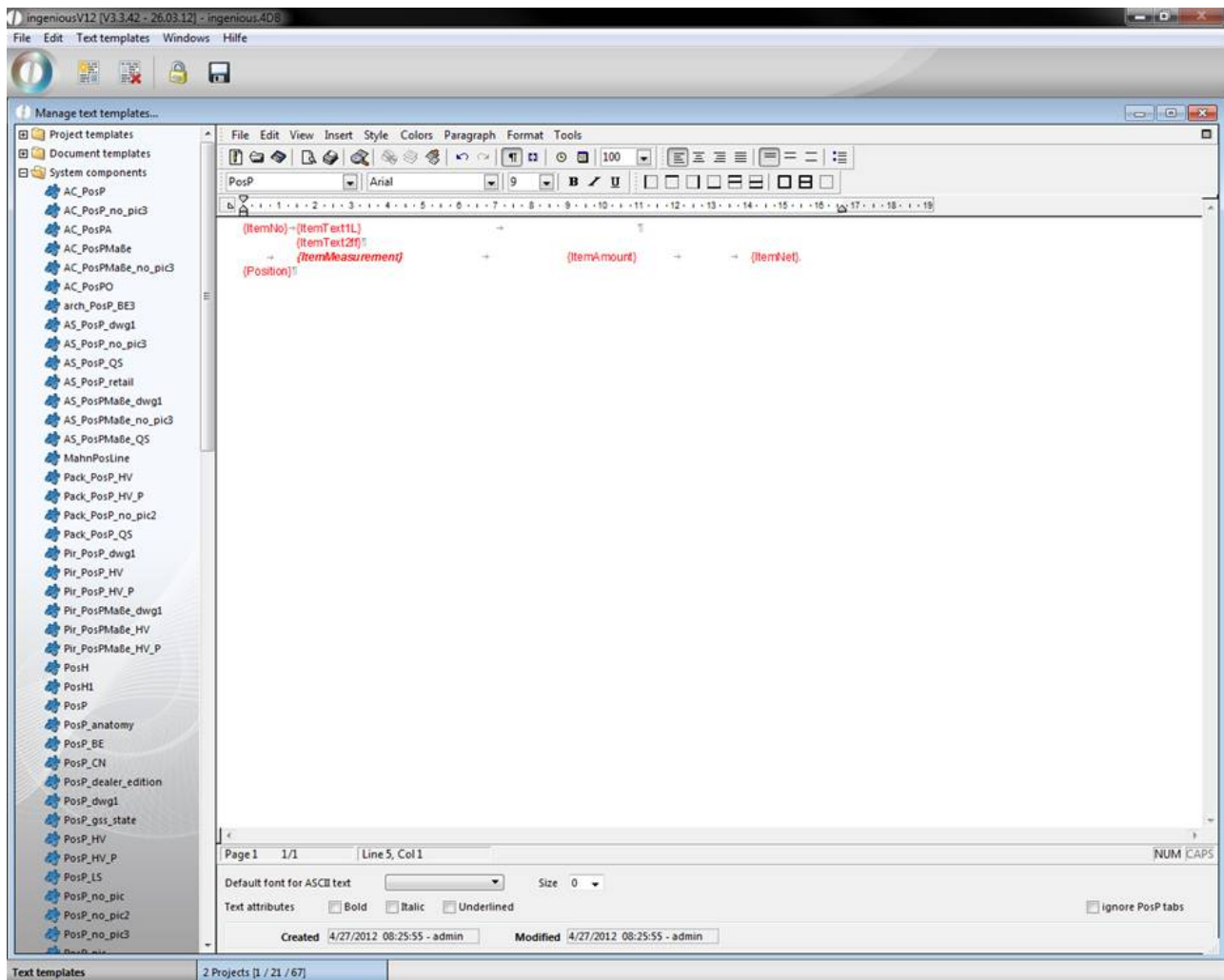
In order to check whether the settings made are applied, simply open the credit note detail view in the workflow and choose "Print Preview". Simply click on the "Update" button and you will see that the representation of the credit contains no PP data and that the position number, measurements, amount and price are illustrated in red.



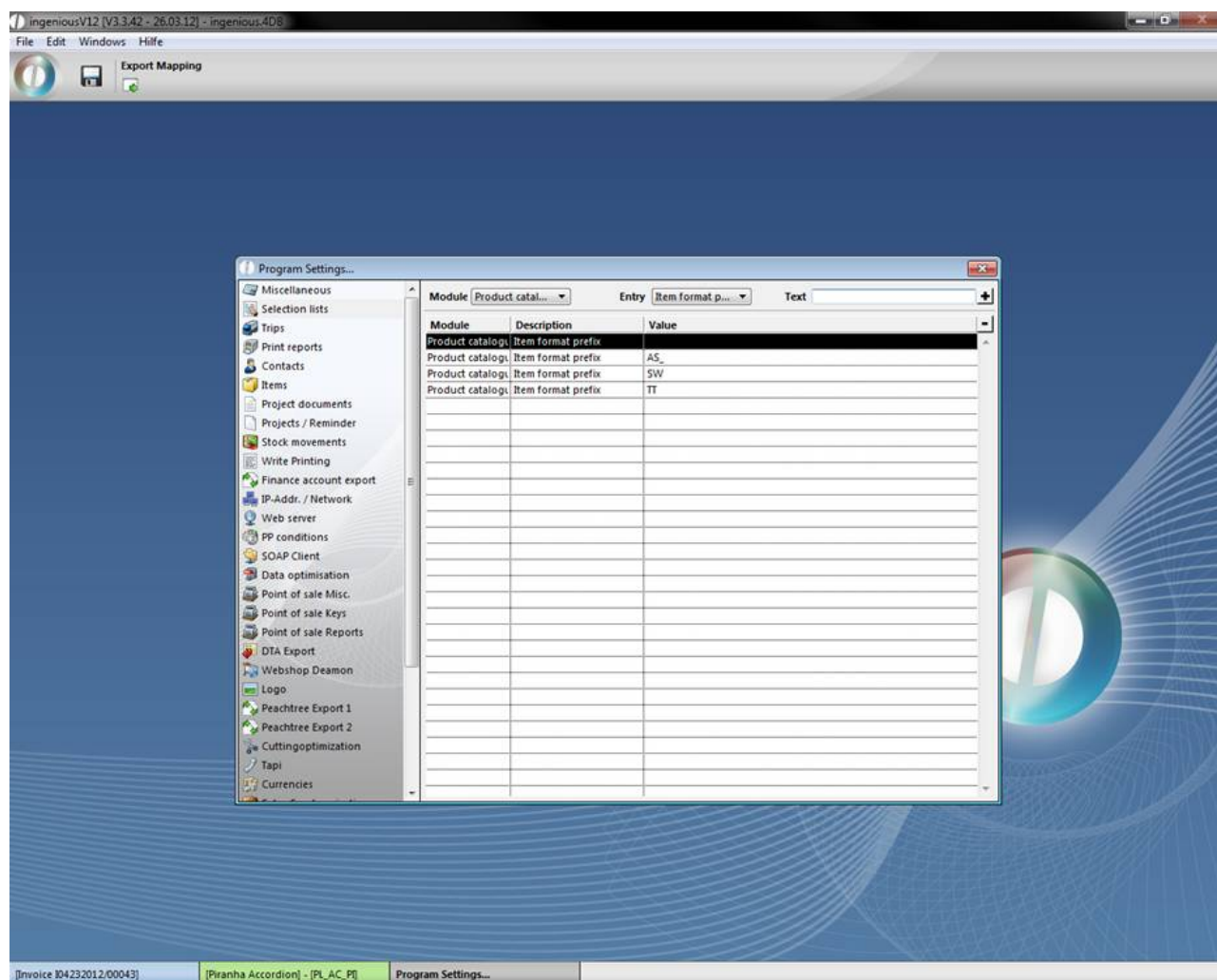
Item format prefix

In the "Items" module, you can also work with given or self-created system modules. However, prefixes are used here for the position formatting. The creation analogously occurs to the item format suffix, with the difference that the letters are placed at the beginning (i.e.: XXPosP).

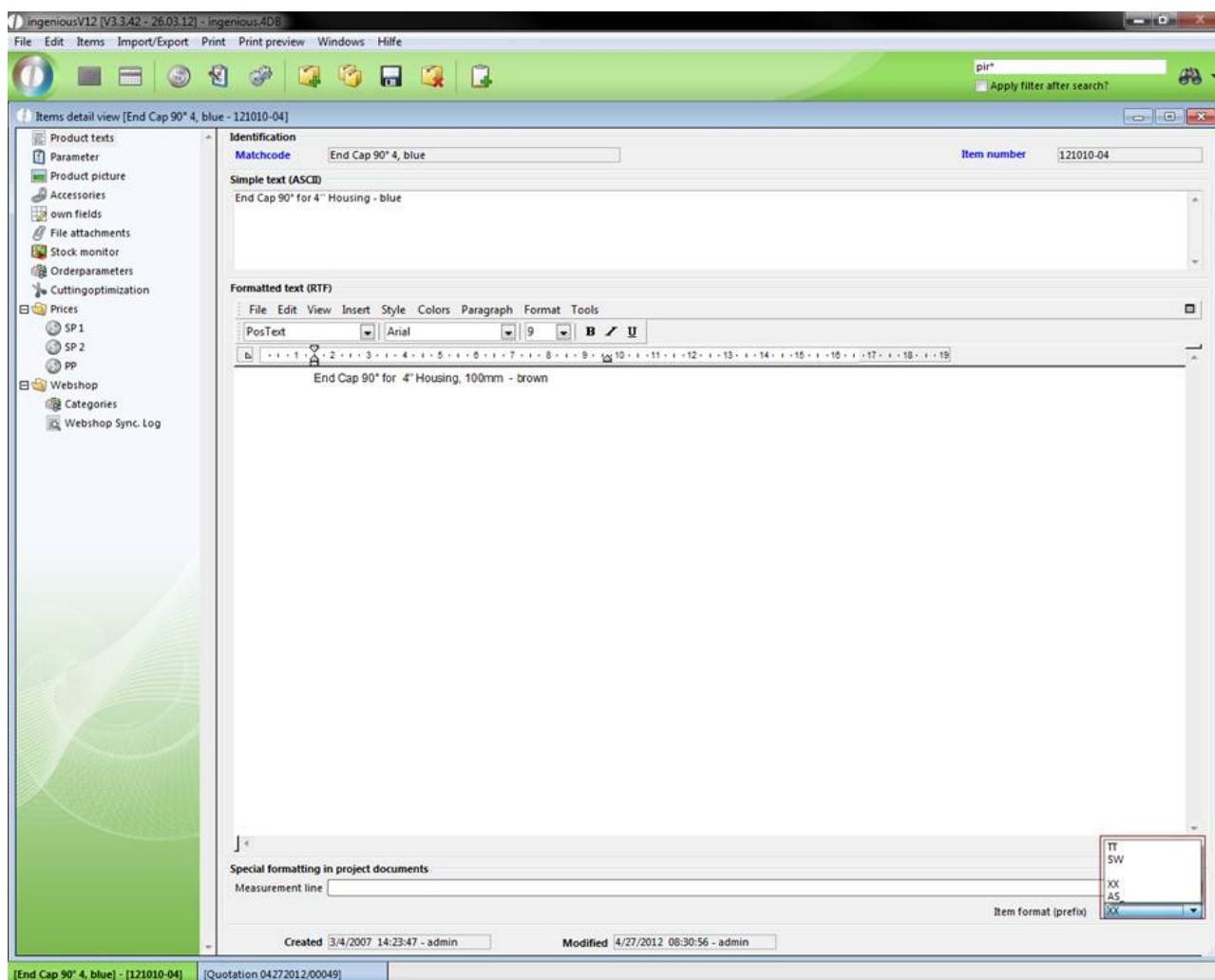




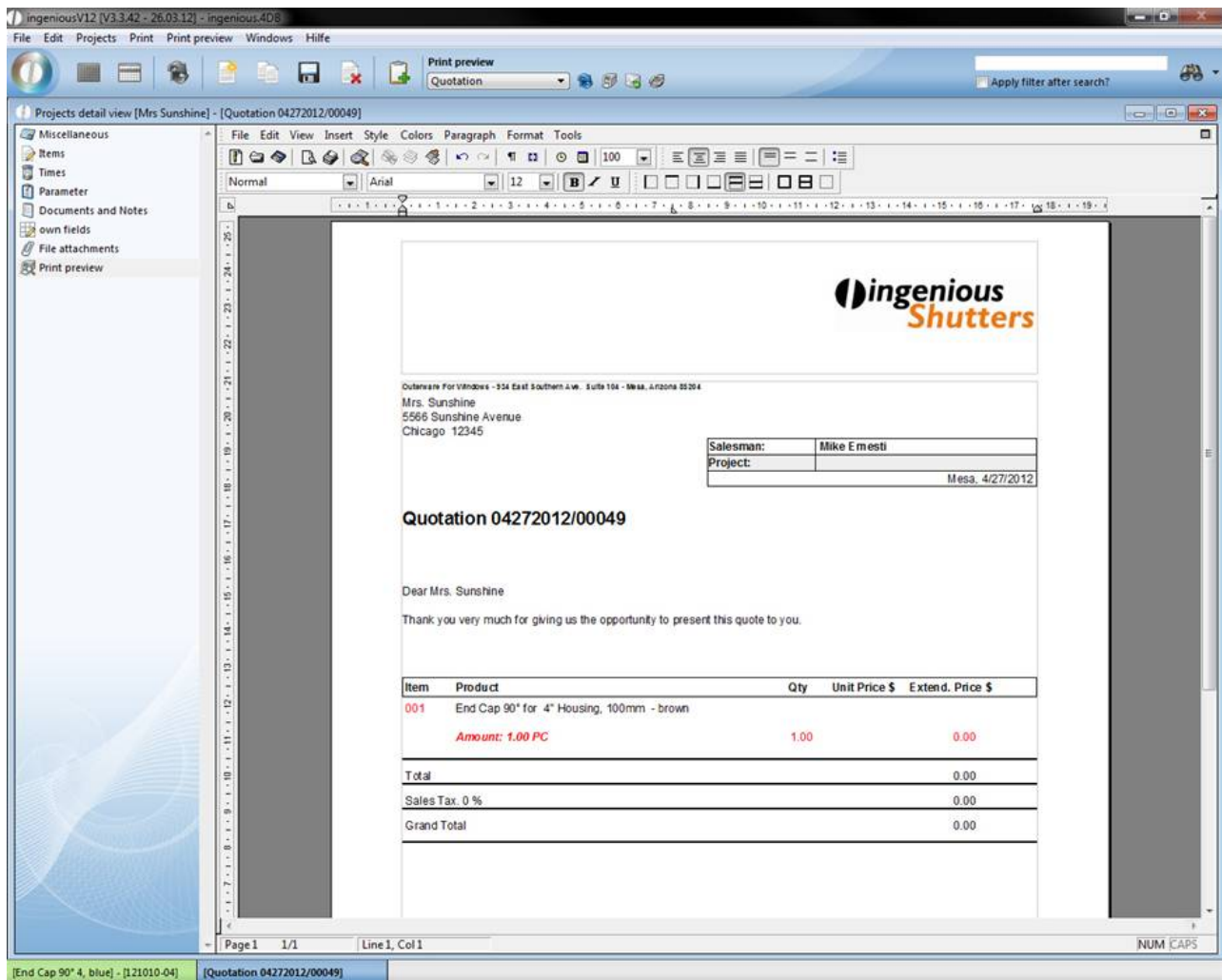
To be able to apply the provided position format prefix, enter the self-created prefix under the "Prefix position format" using the module option, "Product catalog" in the program settings in the "Selection lists" column.



Now you can choose the desired prefix in the article detail view in the "General" column in the "Item format (prefix)" column.



If the article is now printed in the project documents, the article text edition takes on the provided formatting.



Project templates

Since ingenious.V12 a new additional system is included, that makes the process of creating print templates easier and more intuitive, by putting the system components directly into the template.

The new system based on so called "tags". Each area is surrounded by an opening tag ("`<Tag name>`") and a closing one ("`</Tag name>`"). There are three reserved main areas: table head (`<Tablehead>...</Tablehead>`), items (`<Items>...</Items>`) and the sum block (`<TotalSection>...</TotalSection>`).

Tags can be extended with two attributes:

"repeat" – repeat tag on every page of the printout

"wrap" – interrupt content by a page break is allowed or not

Tablehead

In this area you define the illustration of the tablehead in the item view. You can use the attributes "repeat" and "wrap".

Items

Here the style of the different item formats, like PosP, PosT, etc. is defined. Therefore you have to add tag-areas named by the corresponding item format to the items-area. i.e.

`<Items>`

`<PosP>`

...

`</PosP>`

...


</Items>

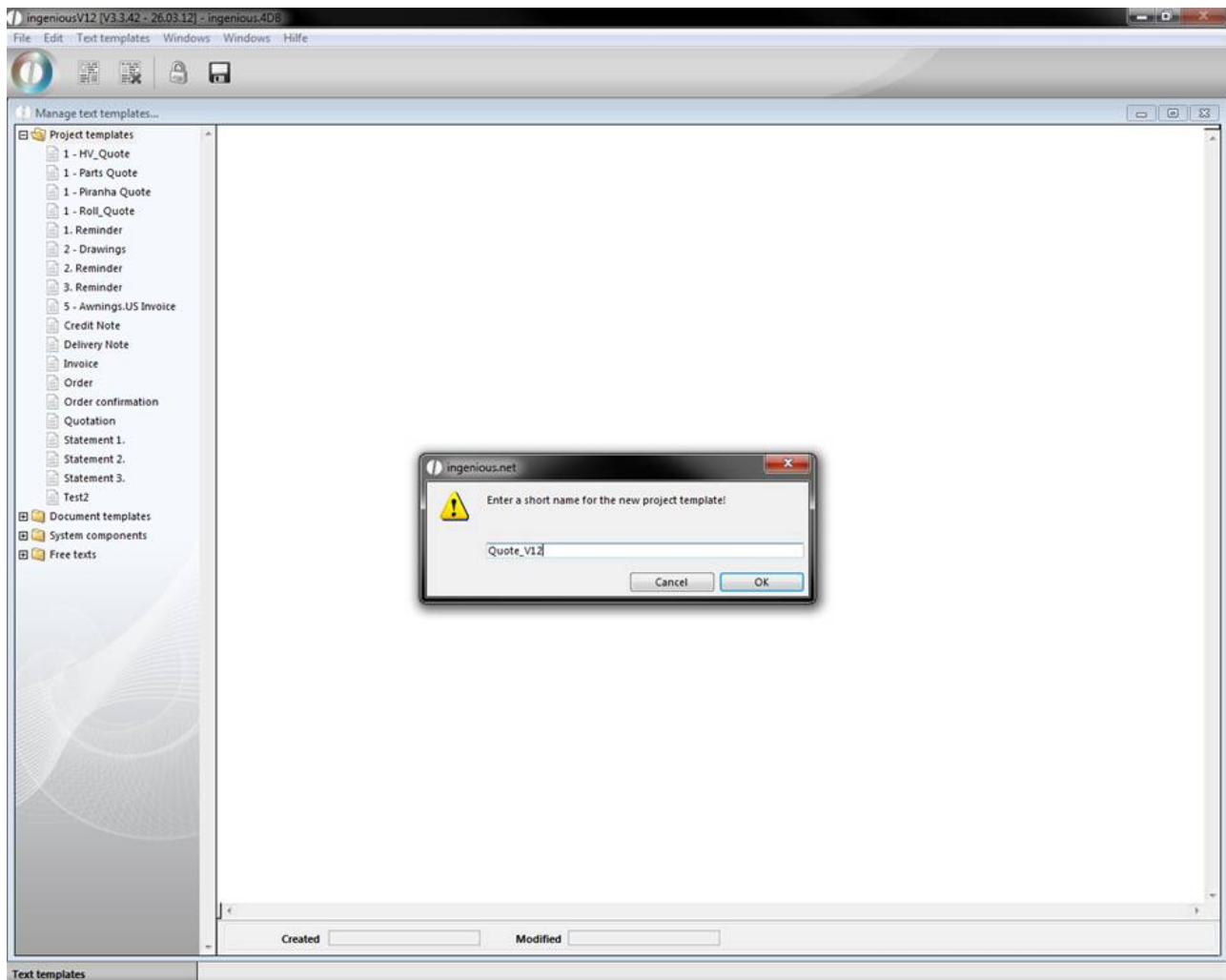
For the items tag no attributes are allowed, but you can add the wrap attribute to the item format tags.

Totalsection

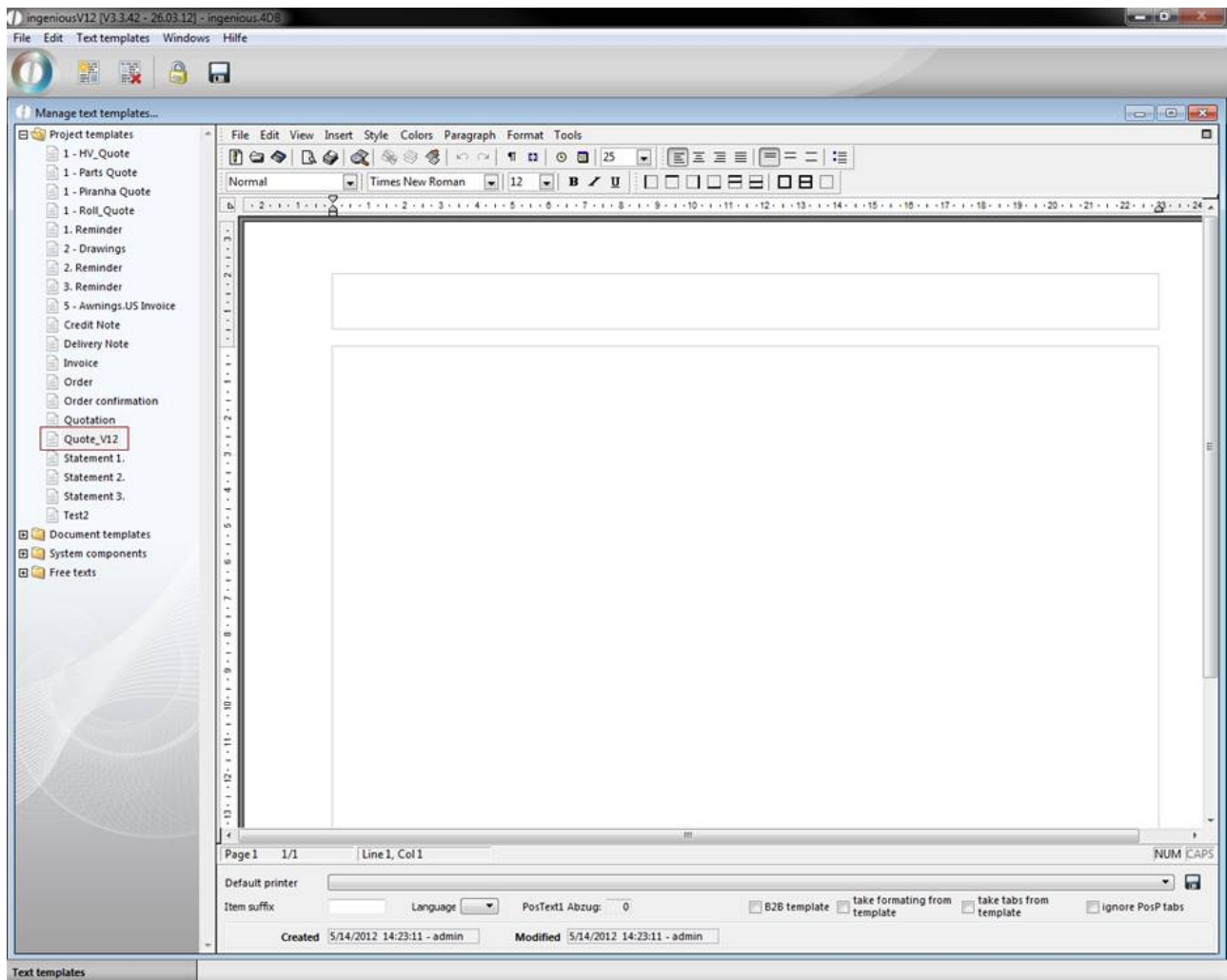
In this area you define the style of the sum block of your item view. You can add the attribute "wrap".

Practice

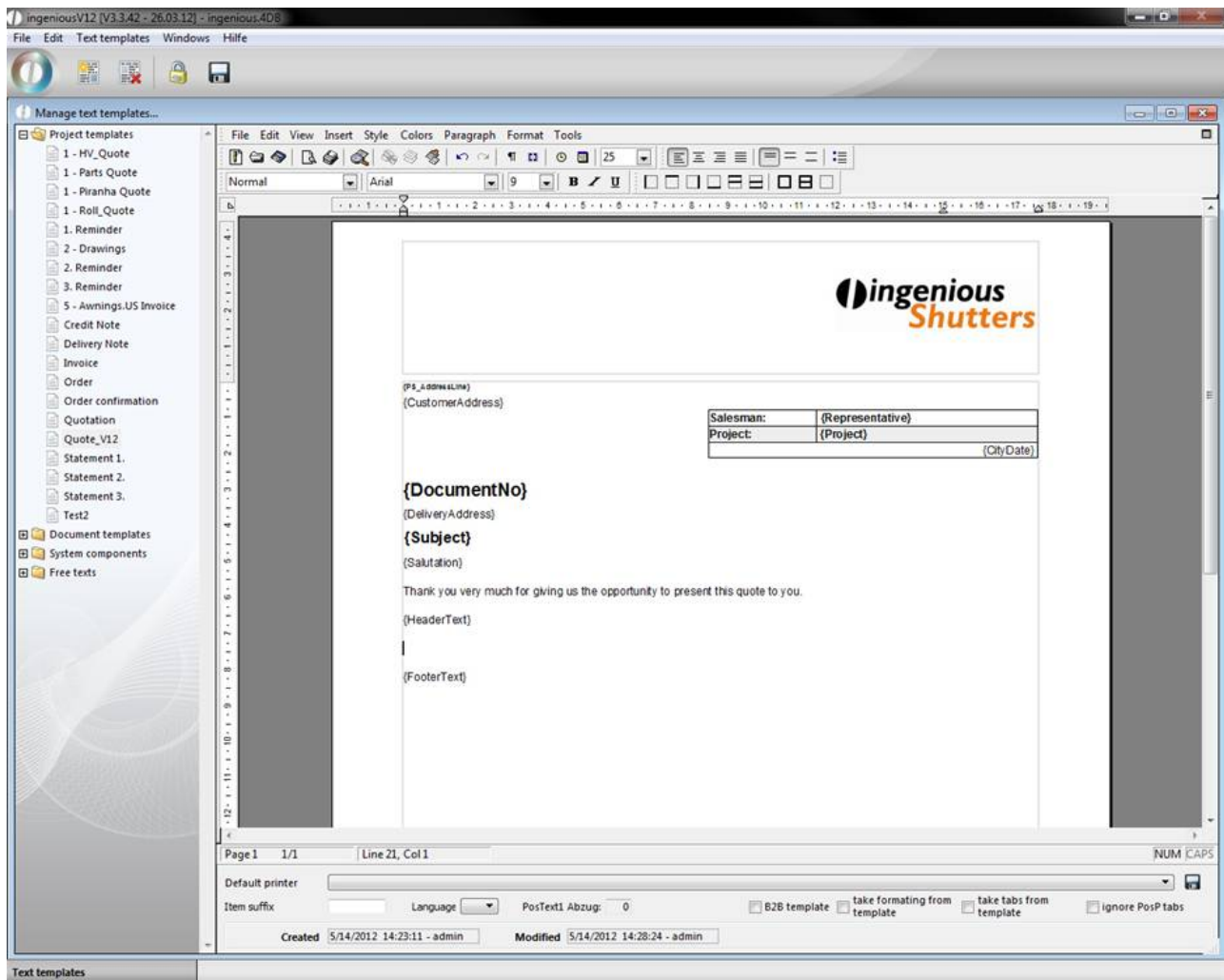
Select the folder "project templates" in the selection area of the Text templates module and click on  to create a new print template. In the dialog you have to enter a name for the document, like Quote_V12.



By pressing "OK" the new template will be created and is displayed in the list of the project templates in the selection area. Afterwards the new template is already selected. (select menu -> view -> page to view the document in page view)



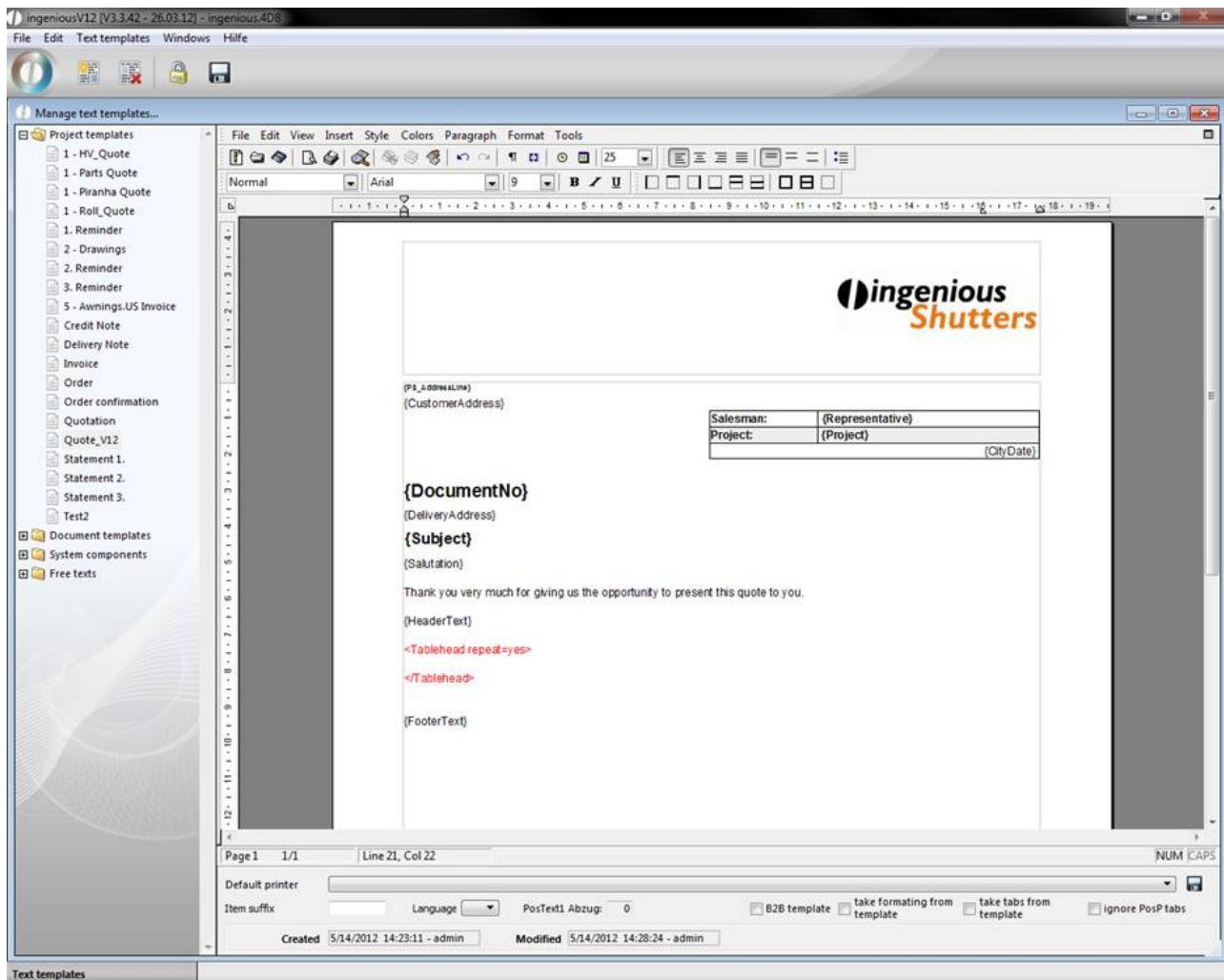
Now you can modify the document.

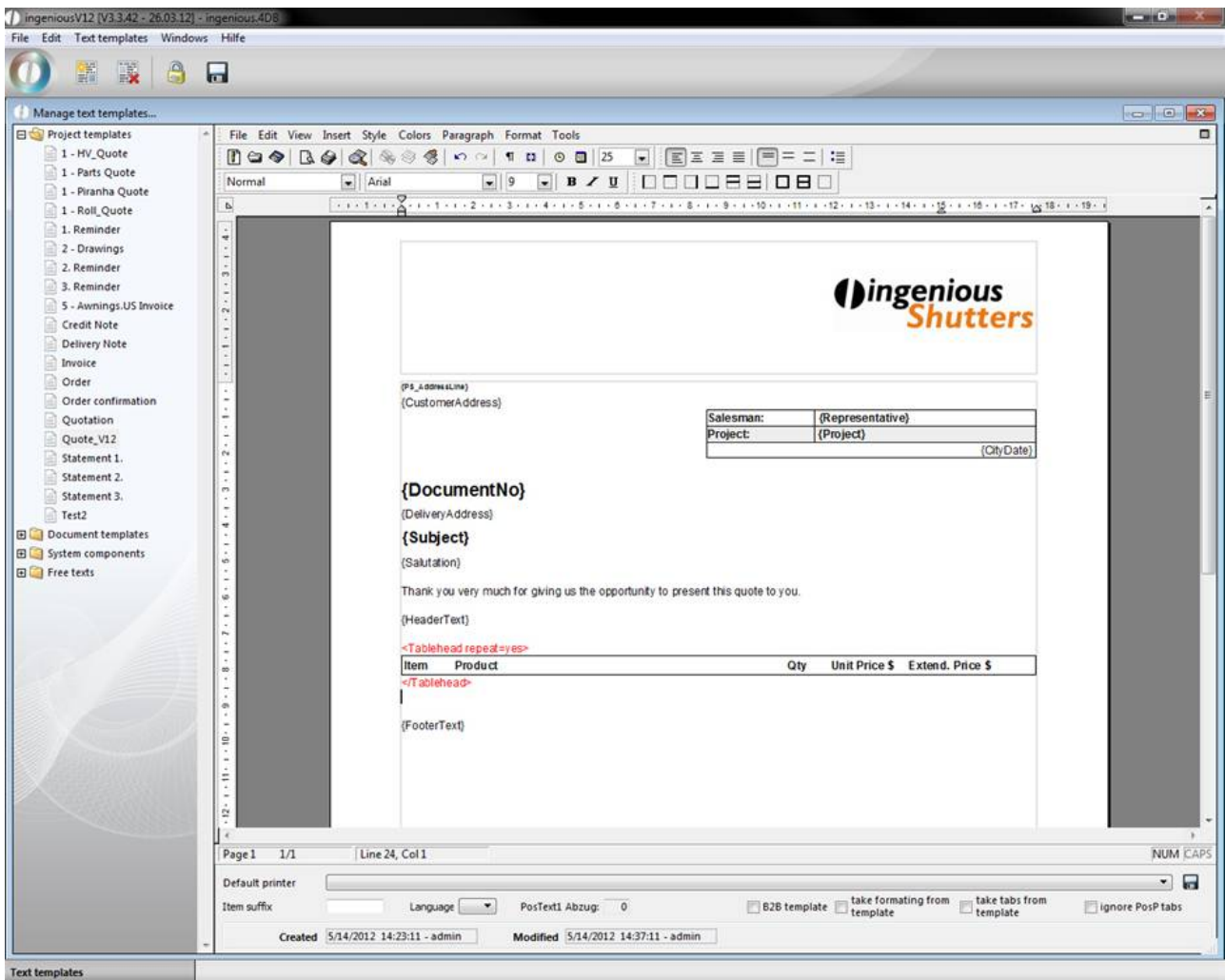


To add a tablehead area, just add "<Tablehead>" to your document. The closing tag will automatically be added.

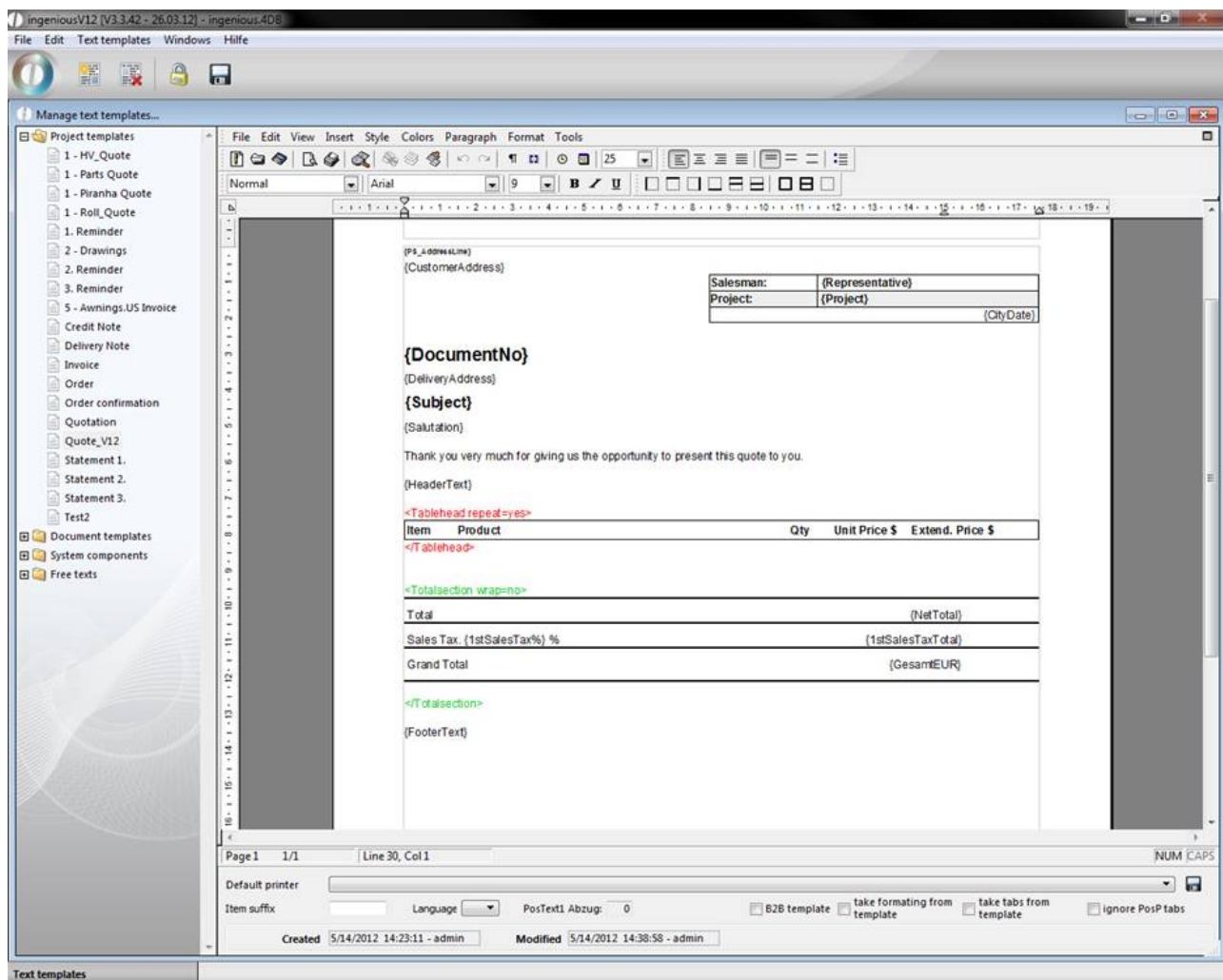
Hint: For a better overview it is useful to color the tag pairs differently.

Feel free to add the attributes "repeat=yes" resp. "repeat=no" and "wrap=yes" resp. "wrap=no". (Otherwise the default value "no" will be used)

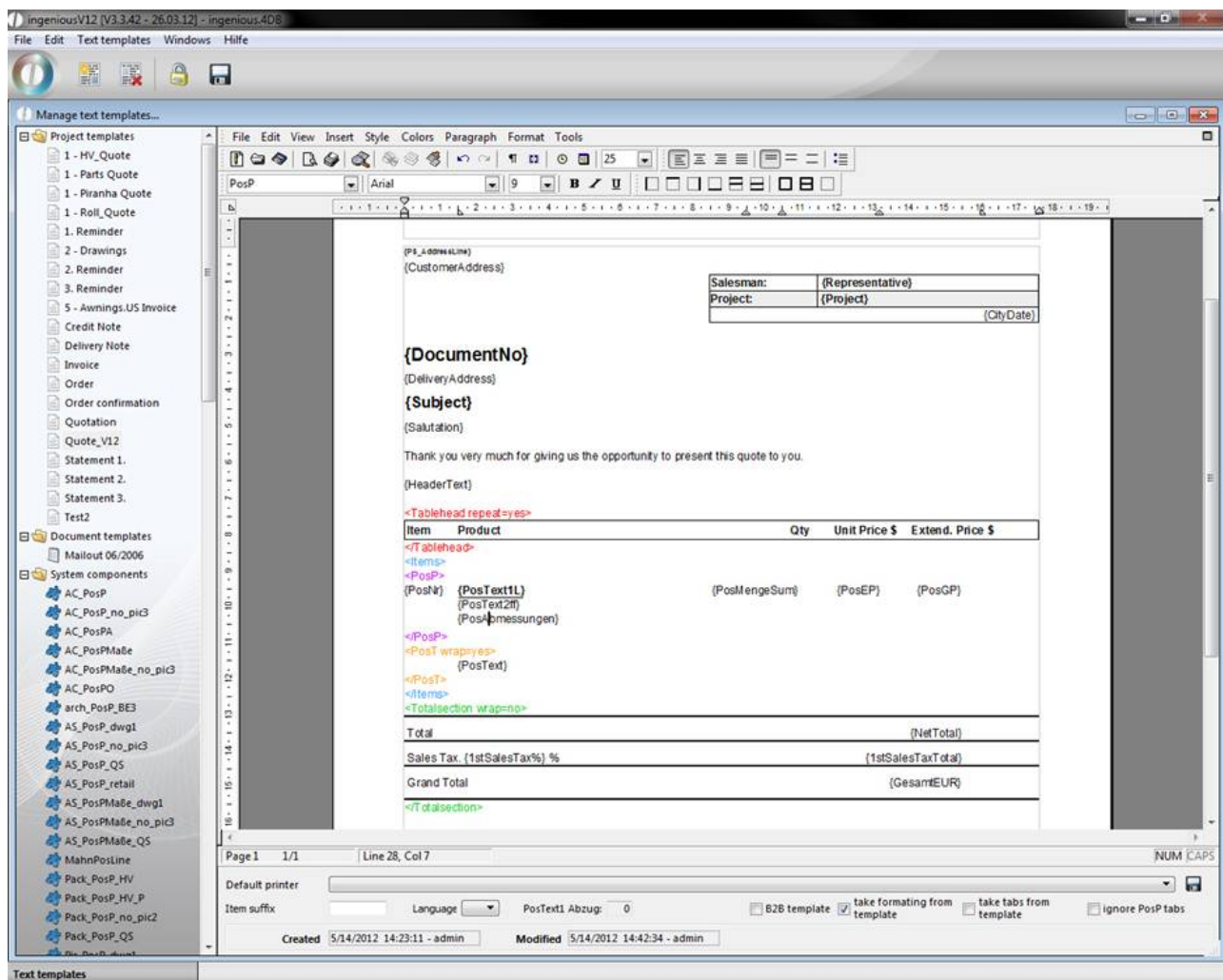




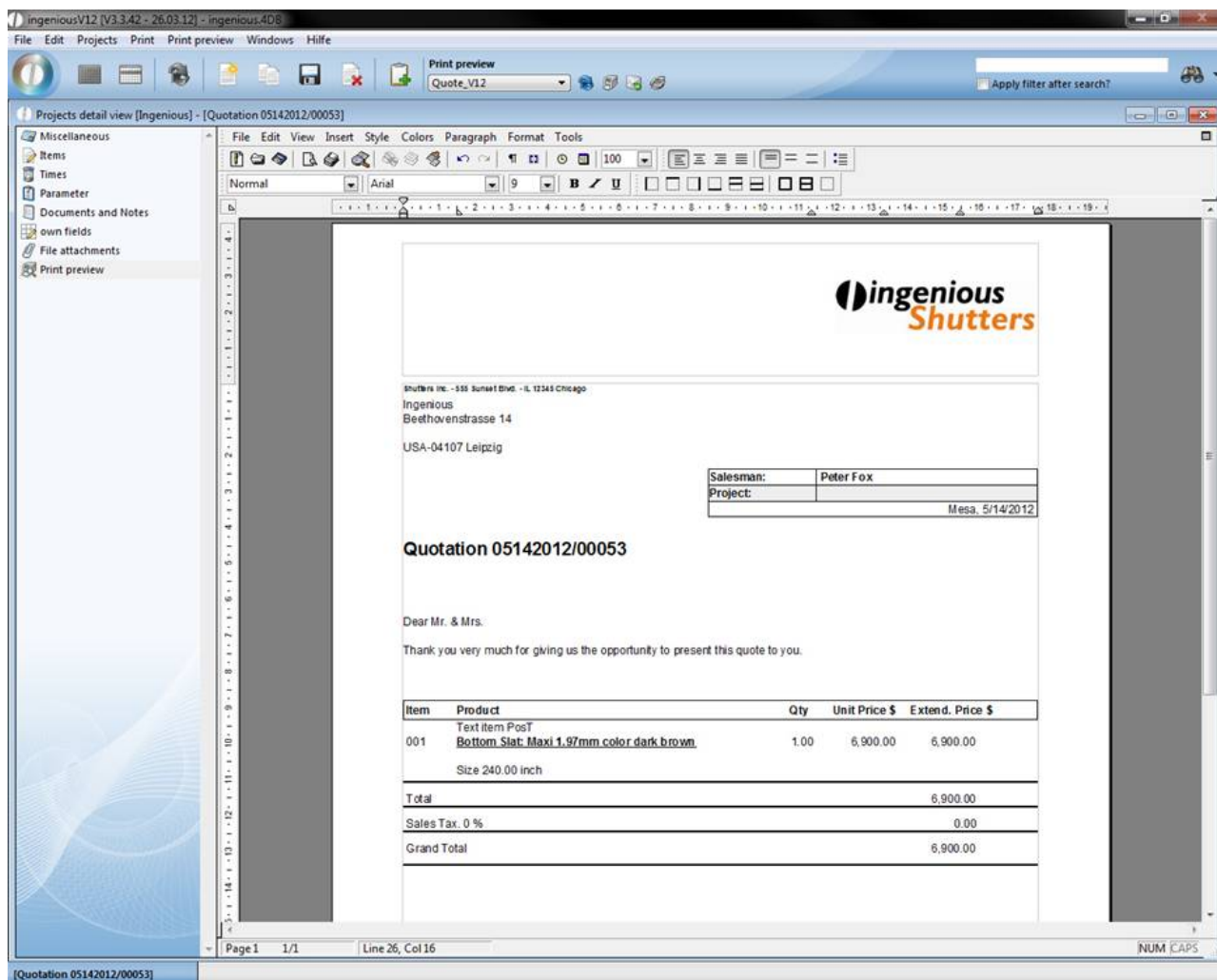
Analogous you can create the sum block.



After you add the items-tag, you can define the desired item formats. Here we created styles for the PosP and PosT format.

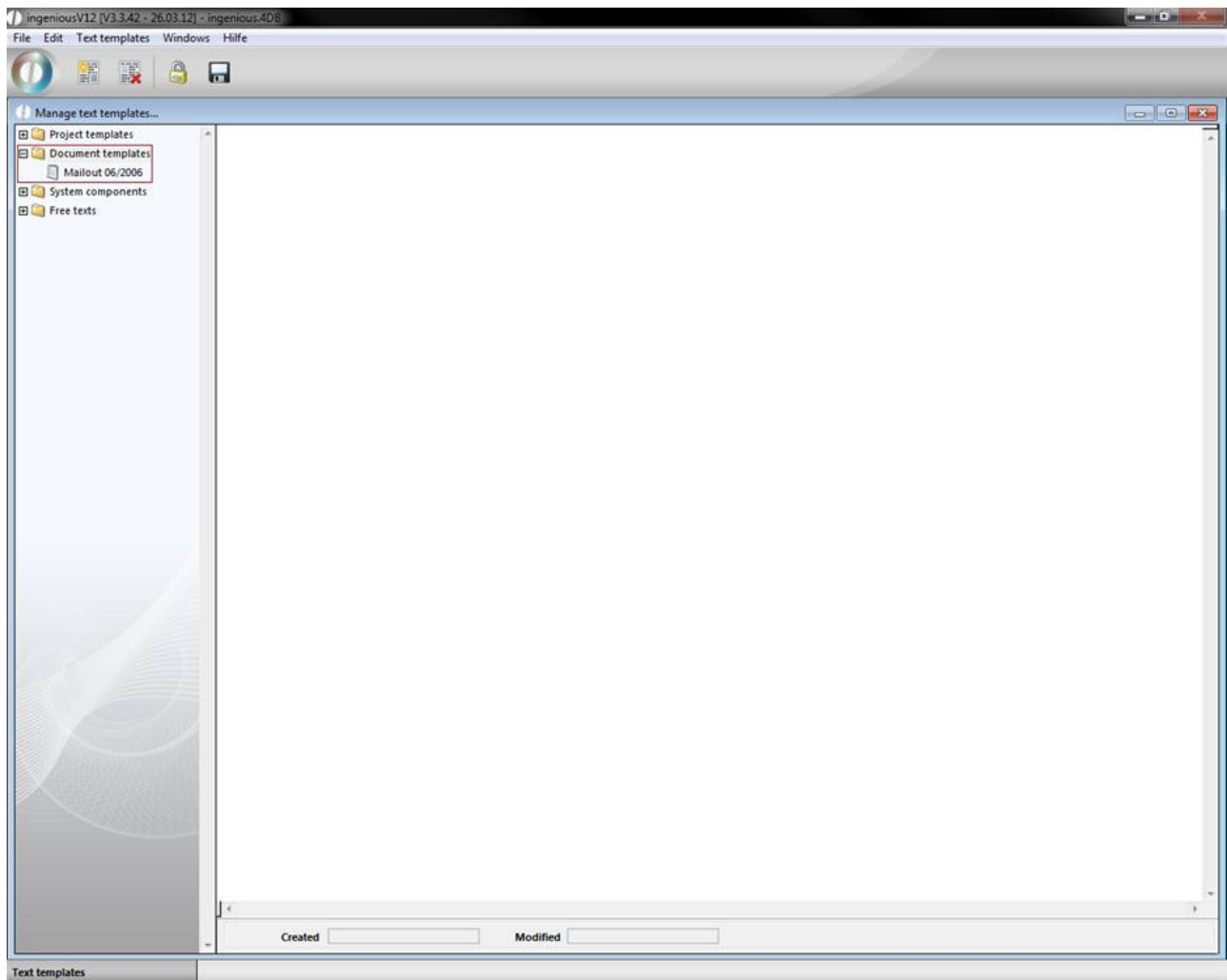


Additionally the field "Take formatting from template" was checked so the formatting of the placeholders will be used for the inserted texts.



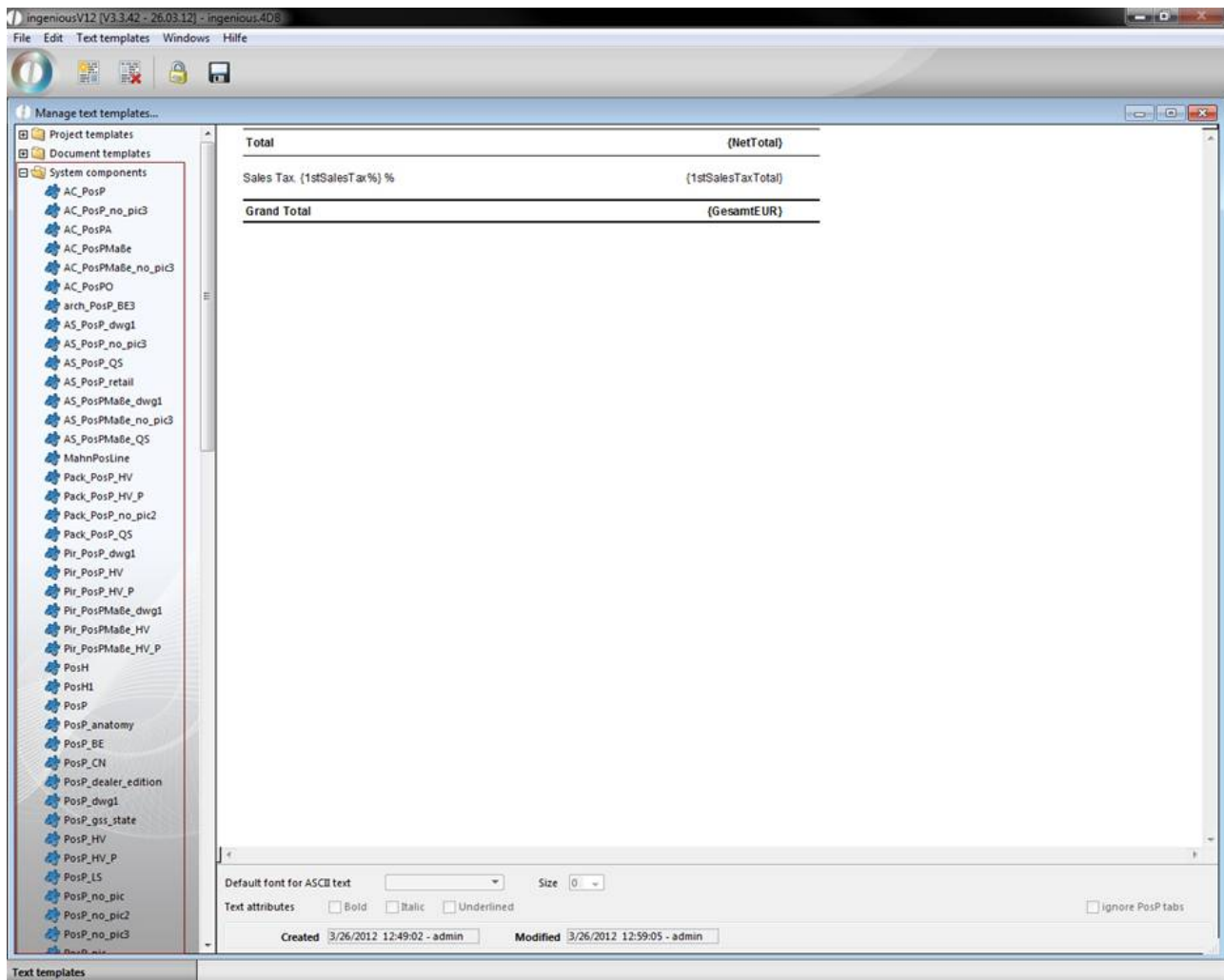
Document templates

The folder "Document templates" contains all other documents that are needed for normal correspondence. Some templates provided by Ingenious.V12 are included here, but you can of course also provide your own templates. The document templates are applied in the "Contacts" module as well as in the standard serial letter assistant.



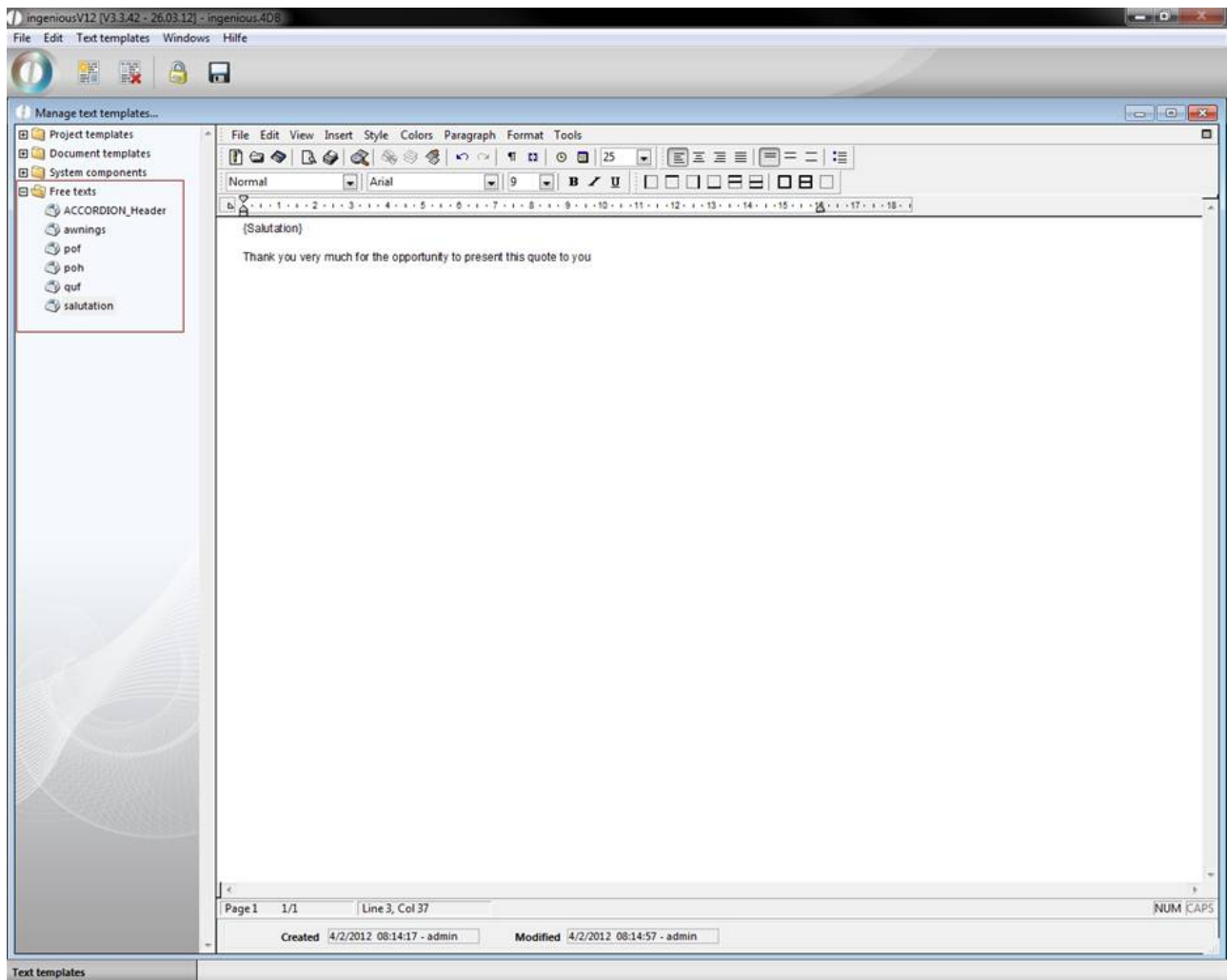
System components

As the name already suggests, this "Module" folder contains "components". With their help, numerous documents can be created quickly and easily. This is how the document templates are placed together out of more system components for example. The system modules differ because of the integrated placeholders of the "Free texts". These placeholders give the system components their functionality. They refer to certain values of the record and are replaced by the printing of the document with the suitable value.



Free texts

The "Free texts" folder contains as many abbreviations as possible, which should save the user the work of writing. Often used text phrases such as "Sincerely Yours" can be therefore simplified. The "Free texts" are primarily used during the creation of the project documents in the header and footer. Within the texts, placeholders are also used. Also, you of course have the possibility to provide your own free texts here.



Creating and editing text templates

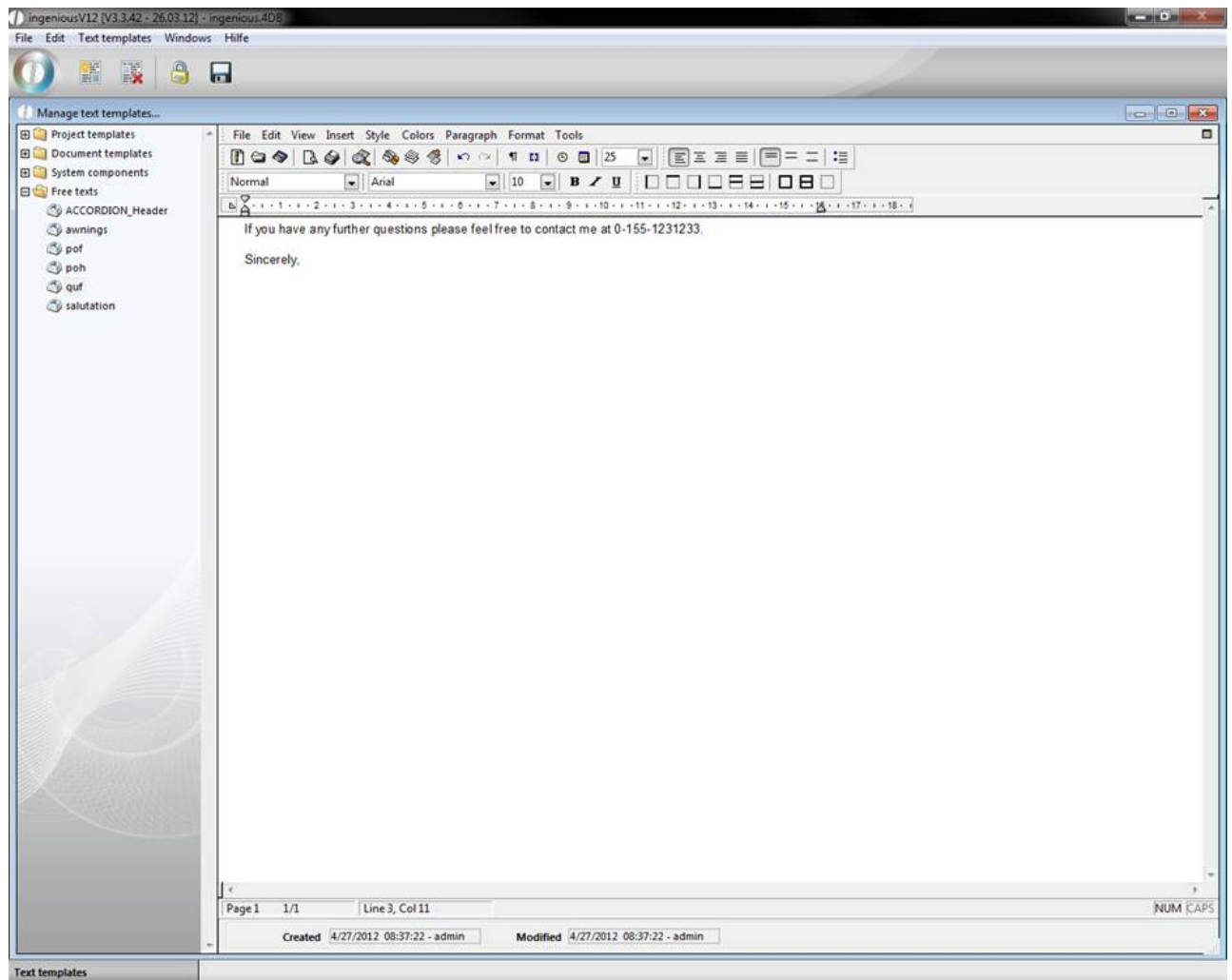
Now you will create your first text module in Ingenious.V12.

Practice creating text modules

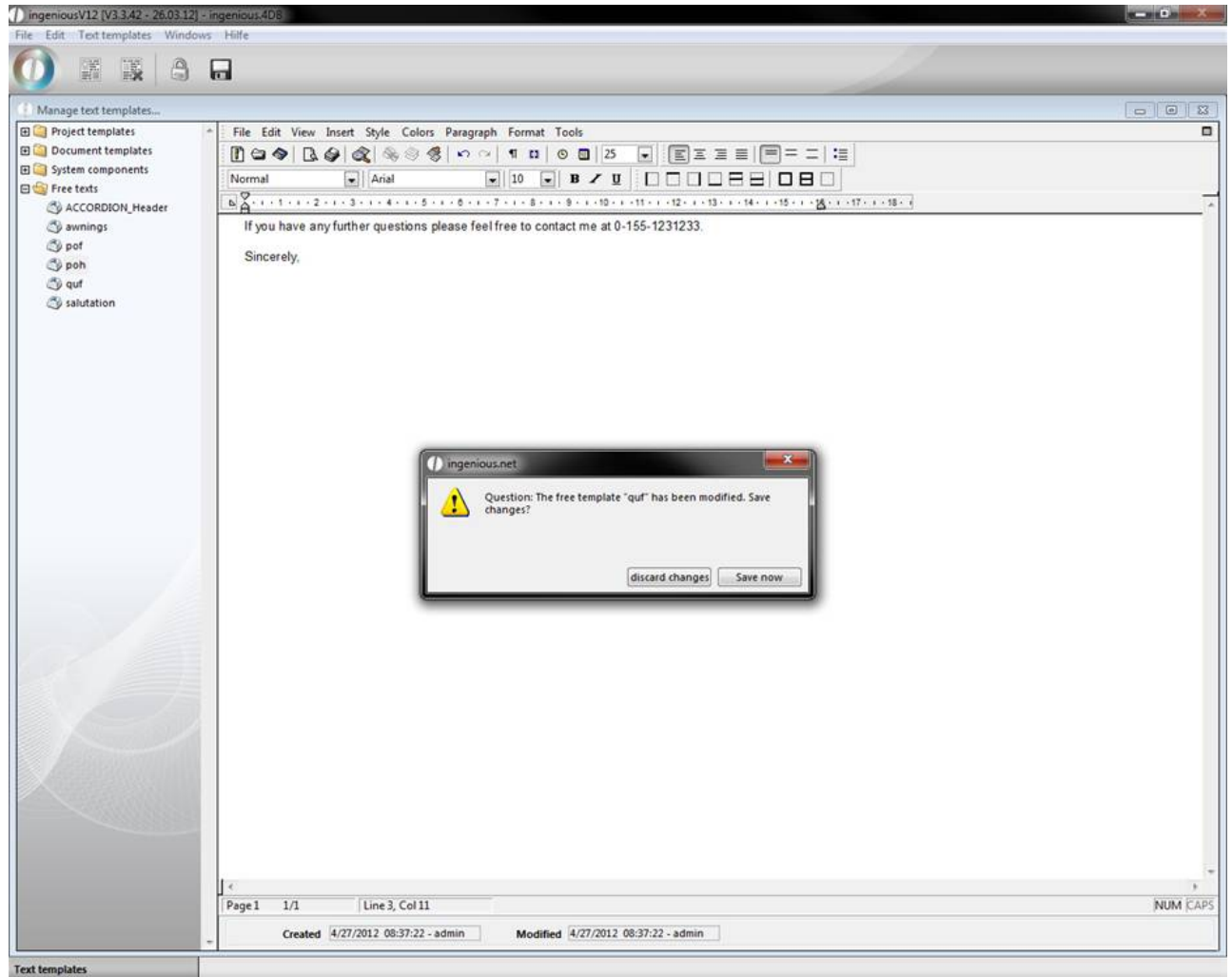
1. Because a text module is always provided in the active group, we first select the group (folder) "Free texts" with a mouse click and click on the button.
2. A window appears around the new text module to give the new text module a name. Enter "quf" and confirm with "OK".

Attention! The names of the text modules may not contain "." (Points) because this later leads to disturbances when importing and exporting.

3. On the right side of the window, you can enter the full text for your text module.



4. With a click on you can save your text template.
5. If you want to now click on another text module or leave the text template administration, a query window in which you confirm with "Save now" appears.



6. In order to change this text module again, you must mark first the text module in the left tree diagram with the mouse and then click on the button. The button serves to delete a marked text module.

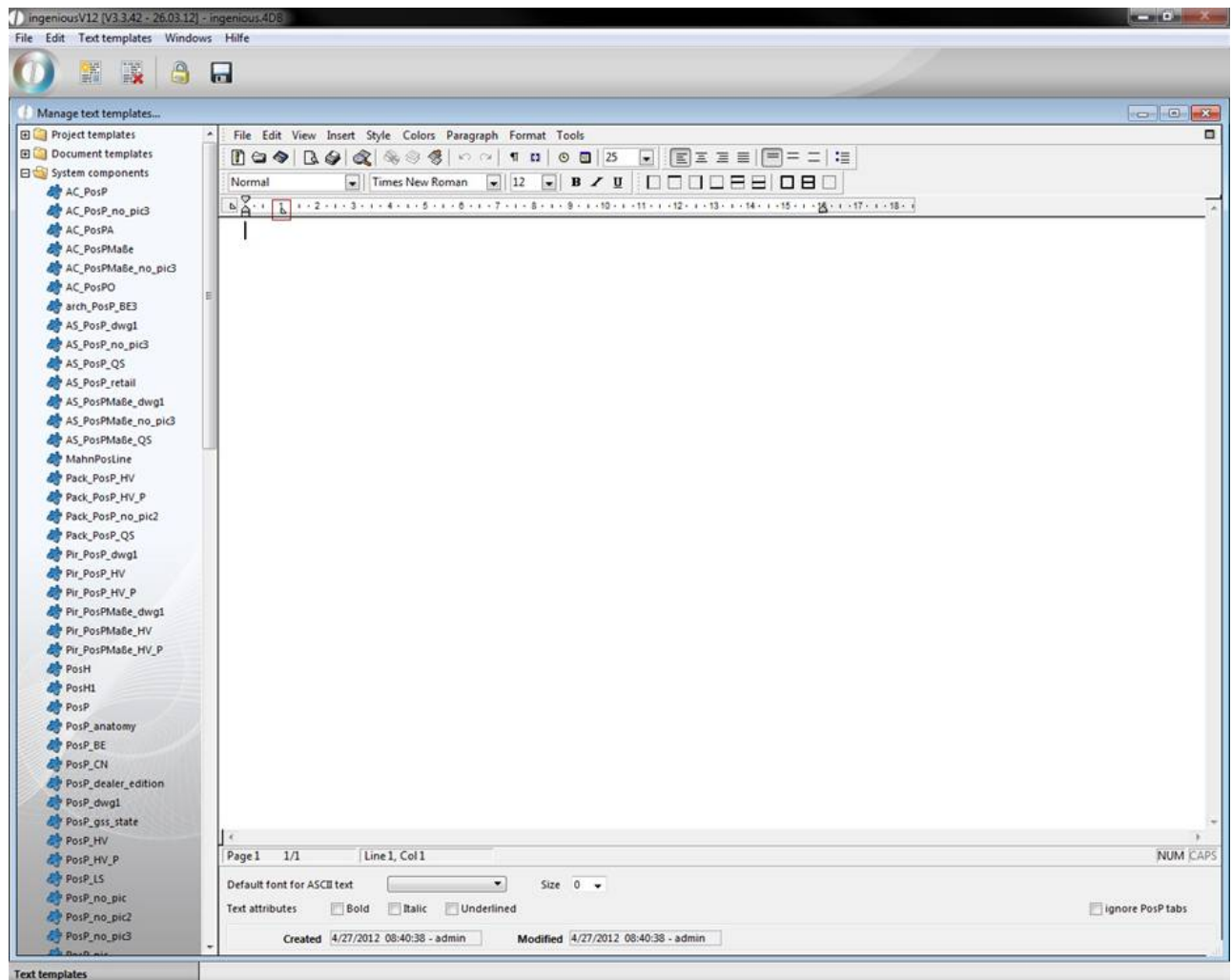
Tabs

The assignment of tabs during the creation of text modules is almost an absolute must. Tabs are steady document marks in which texts can be adjusted. These so-called TabStop's can be immediately controlled with the tab key (\rightarrow). In order to better understand the contact with tabs, an exercise follows.

Practice using tabs

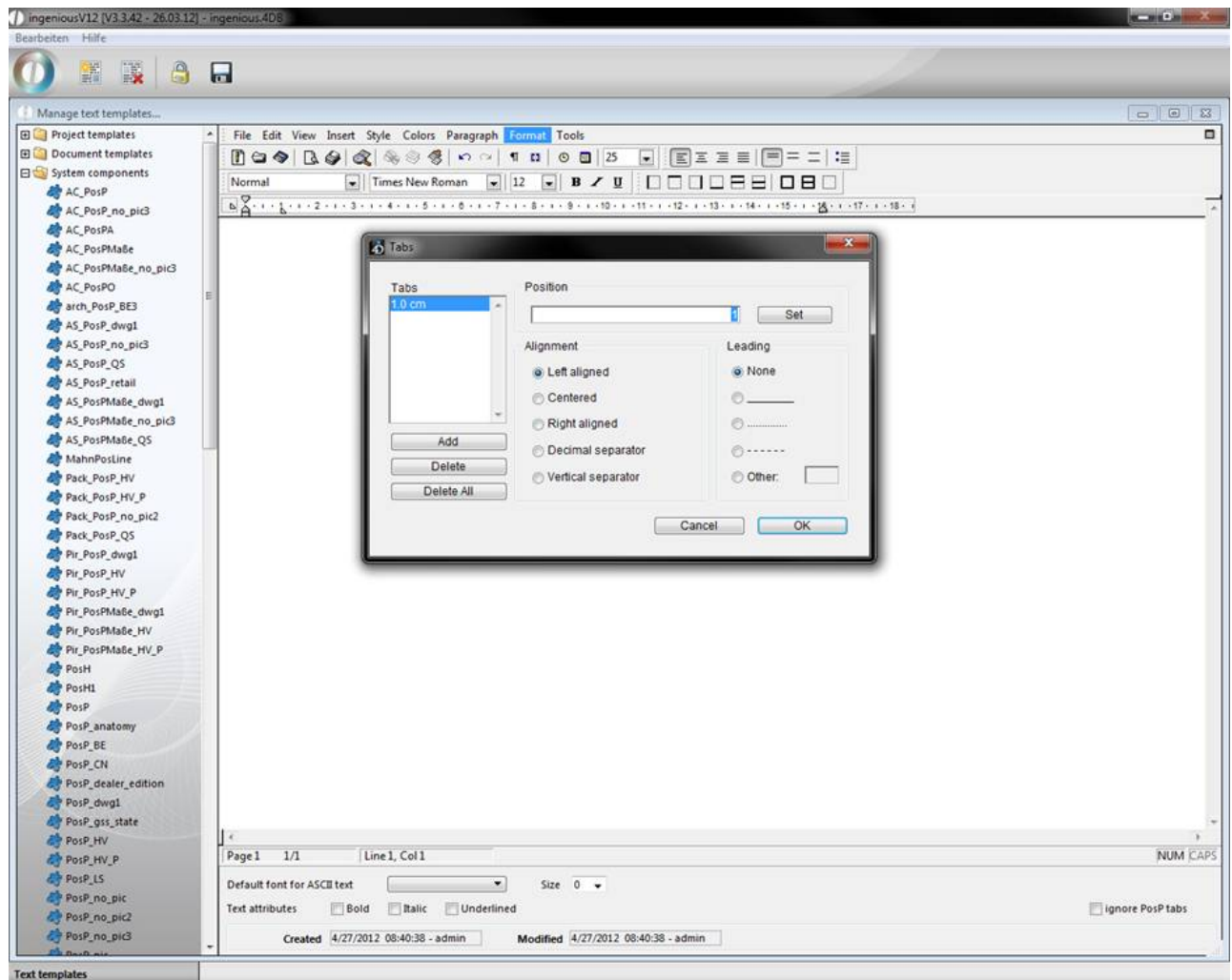
1. Open the text template administration and enter a new text module with the description "Practice" in the "System components".

There are two ways to set a tab. The easiest one is to click with the mouse on the desired (horizontal) side position of the ruler shown on top. On the ruler, the tab is usually shown with a small triangle.

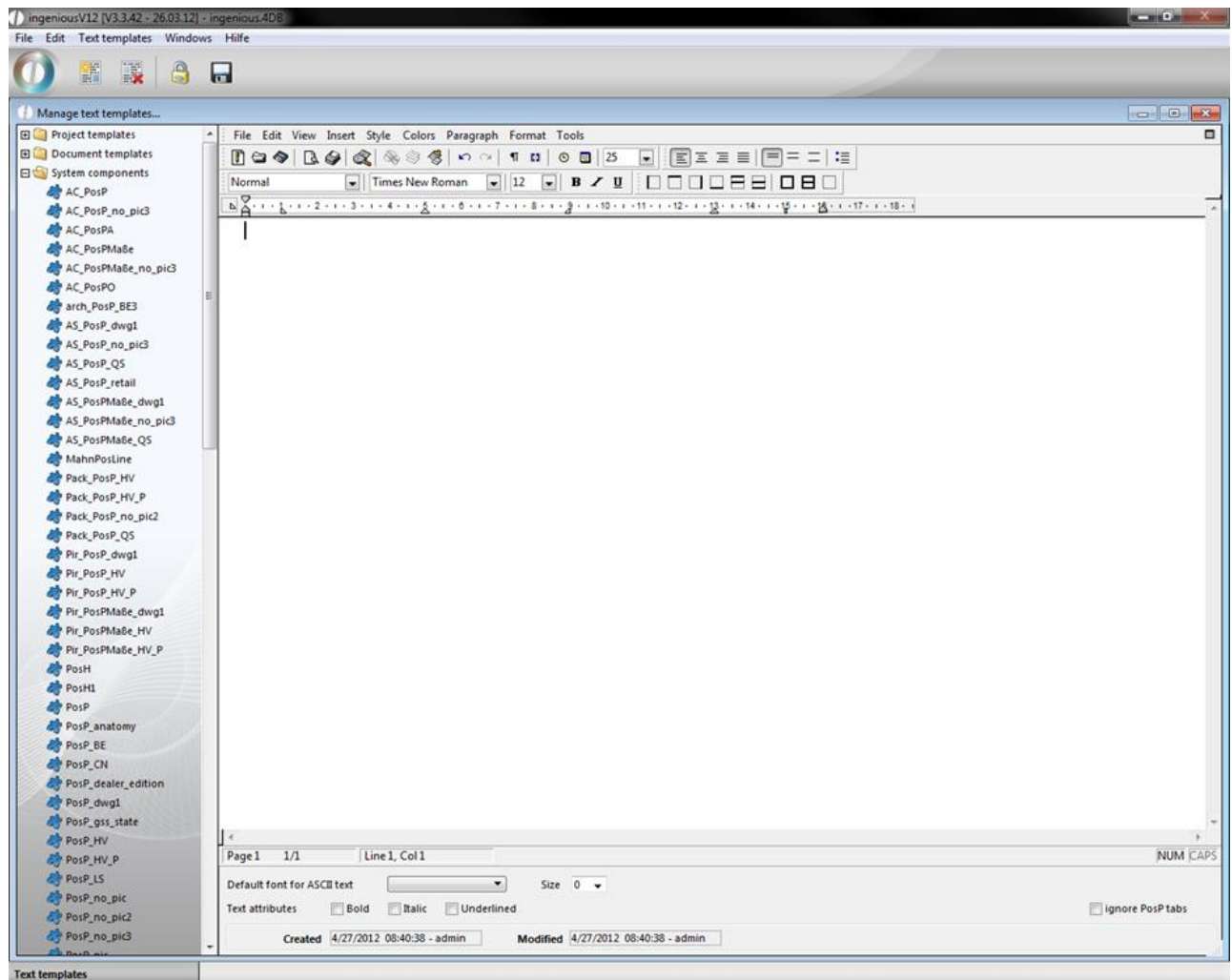


Another way to create tabs is with the menu entry, "Format/Tabs..." or the key combinations CTL + ↑ + T.

2. Choose the menu entry "Format /Tabs ...". In order to provide a tab in this menu, you must first click on the key "Add". Now a tab with the position of 1 cm is automatically set.



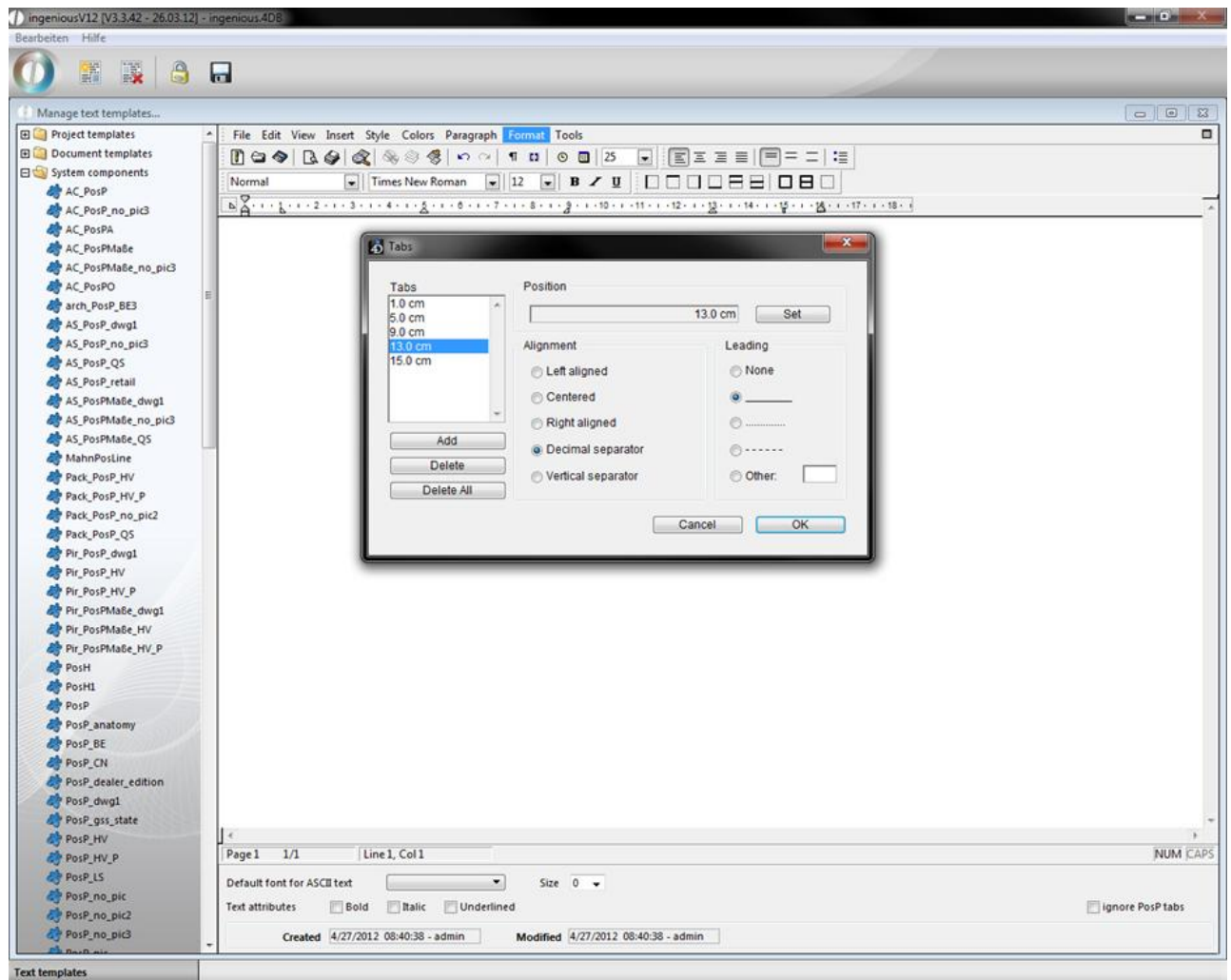
In the area „Items“ the centimeter values (according to the ruler) are specified from the left border and the button “set” is clicked to position the tabulator at the desired place. Thereafter you could choose orientation and/or leading characters. In Ingenious.V12 there are five different orientations of tabulators with suitable tabulator symbols:



3. Create the following five tabs:

- | | |
|---------|----------------|
| 1.0 cm | Left justify |
| 5.0 cm | Center |
| 9.0 cm | Right justify |
| 13.0 cm | Decimal comma |
| 15.0 cm | Vertical lines |

4. Mark the tabulator 13.0 cm and select the continuous line in the "Leading" area.



5. Now click on the "OK" button in order to insert the text modules.

Now the ruler has the provided tabs.

6. In order to also test the formatting of the tabs / to understand, update the following entry on your keyboard:

Tab Key (⇧) "left aligned"

Tab Key (⇧) "centered"

Tab Key (⇧) "right aligned"

Tab Key (⇧) "345.21"

Tab Key (⇧) Enter-Key (↵)

Tab Key (⇧) "formatted"

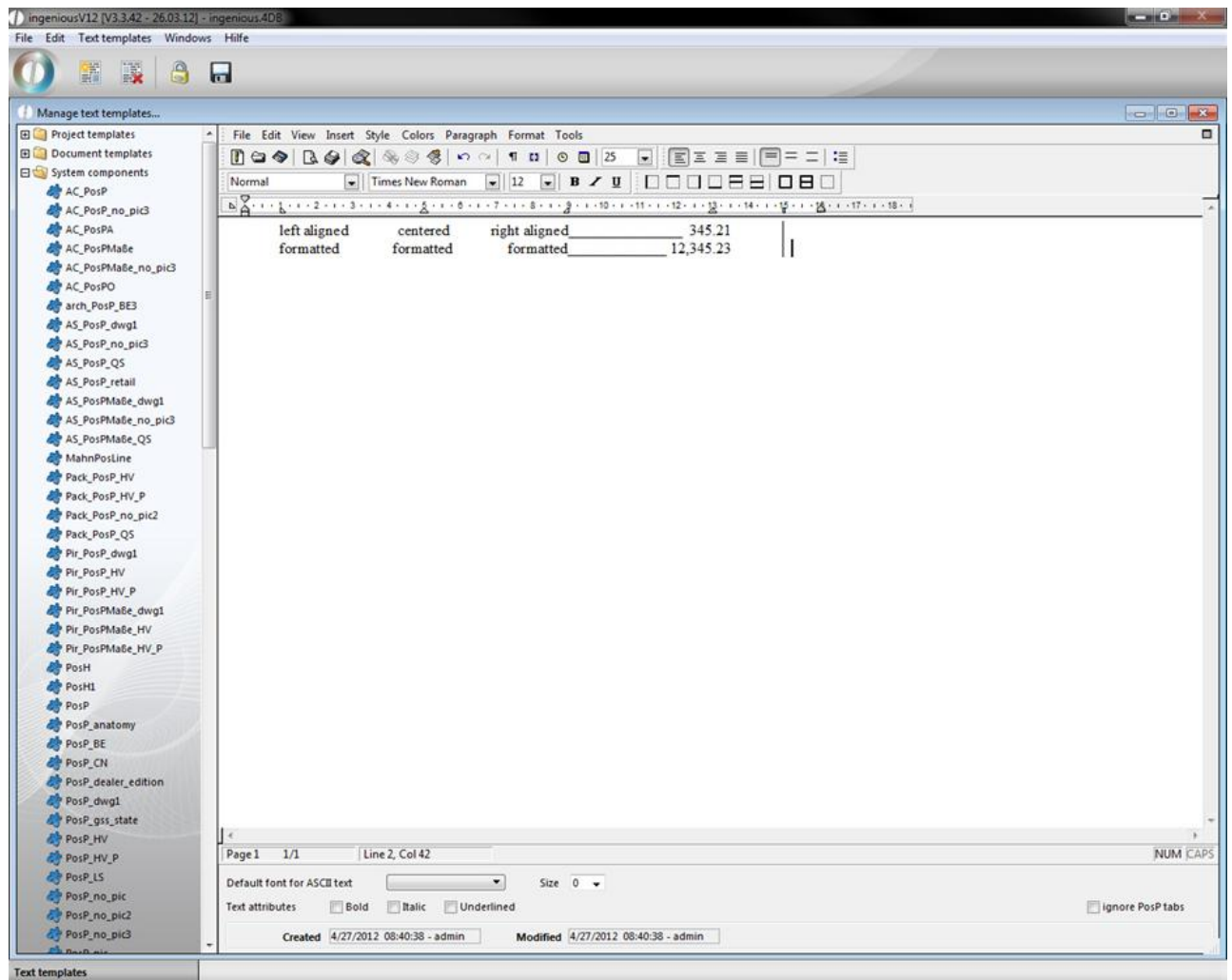
Tab Key (⇧) "formatted"

Tab Key (⇧) "formatted"

Tab Key (⇧) "12,354.23"

Tab Key (⇧) Enter-Key (↵)

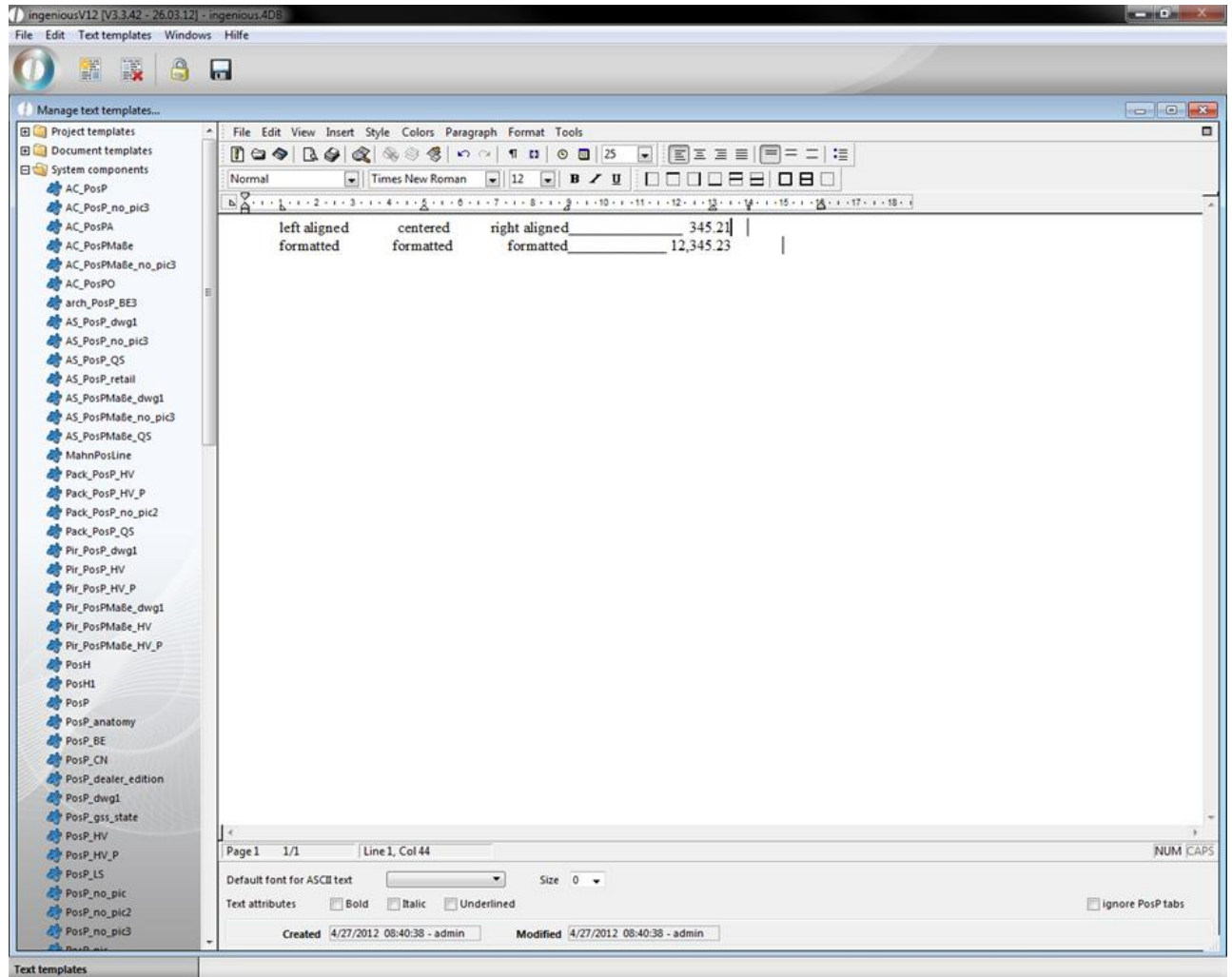
The text module now looks as follows:



The shifting of the tabs is possible directly in the ruler. Simply click the desired tab with the mouse and shift the desired position in the ruler with the mouse key. However, it is also possible to shift a tab with the help of the menu "Format / Tabs ...". In addition, you simply click the desired tabs from the "Tabs" list and change the cm number in the "Position" area. Afterwards click on the "Set" button.

7. Put the cursor in the first line and shift the tab "15.0 cm" by clicking and pull it in the ruler on the 14.0 cm position.

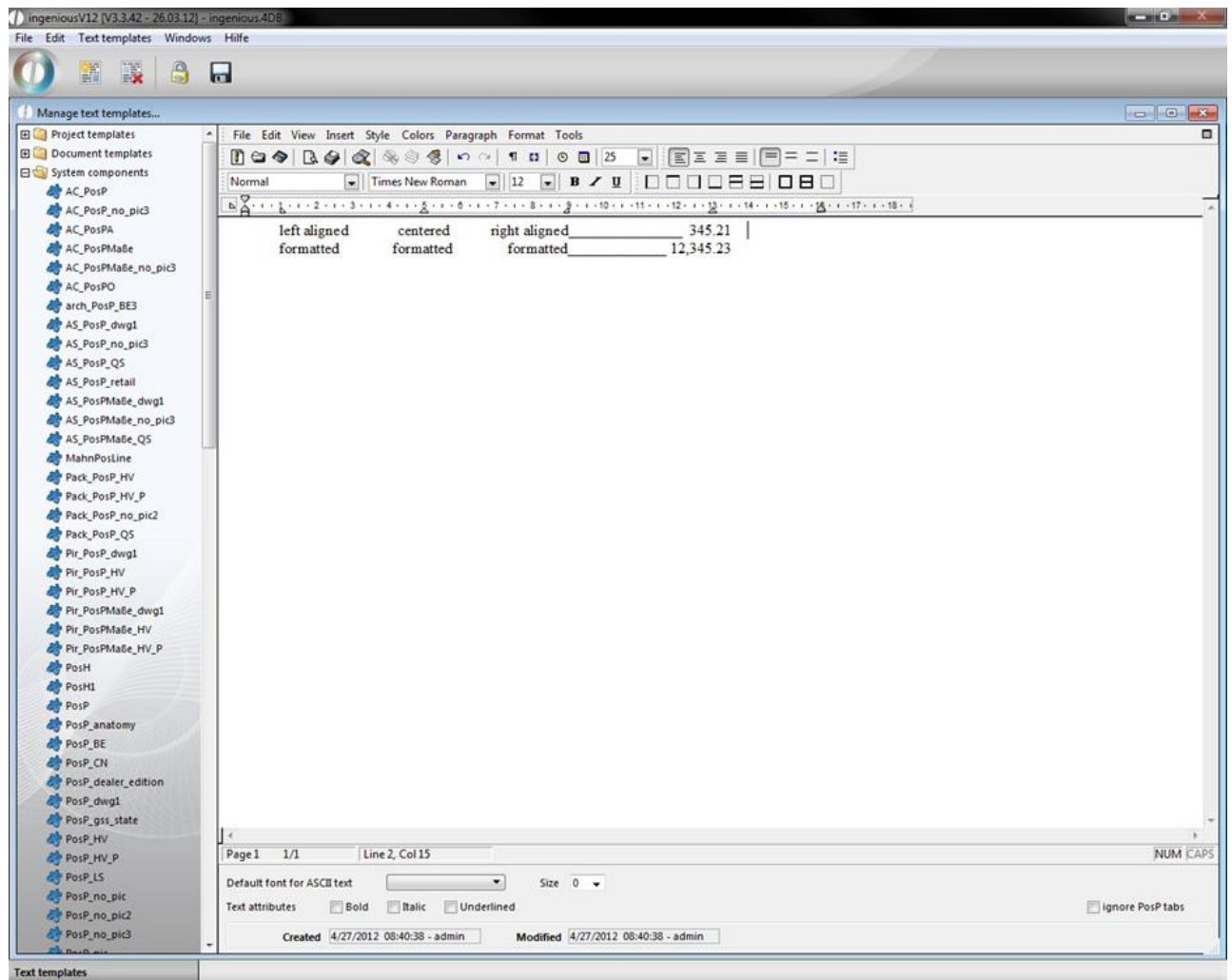
Now you see that only the tab has changed in the first line. The tab (and the vertical line) in the second line is unchanged.



View after the shifting of the tab

That's why in the future you should first thoroughly consider which tabs are necessary in the document / text module, before you create this. In order to delete a tab again, there are two different possibilities in Ingenious.V12. The easiest is to click the tab icon in the ruler and to pull the document with the mouse (down), until it is shown light grey. If now you let go of the mouse key, the tab completely disappears. You can also delete tabs with the help of the "Tabs" menu... ("Format / Tabs..."). Simply select the desired tab from the "Tabs" list and afterwards select the "Delete" button and click on "OK".

8. Place the cursor on the second line and delete the tab 15.0 cm with one of both previously described methods.



View after deleting a tab

9. At the end of this exercise, please delete the "Practice" module with the button.

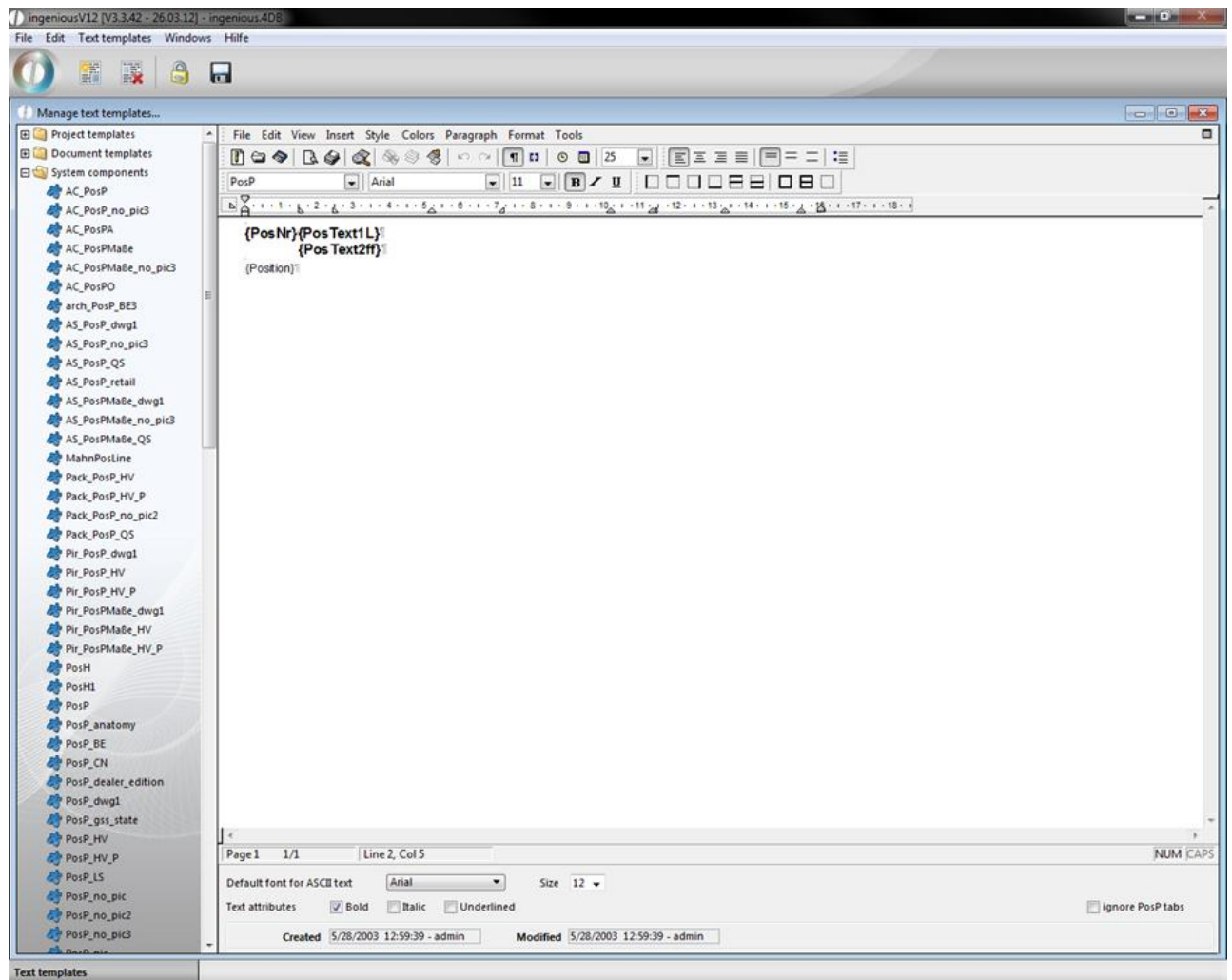
Save and apply the tab sequence PosP

The number and the settings of the tabs build a single tab sequence line by line. One can store such a tab sequence with the menu entry "Text templates / Save format template PosP" in the clipboard. One can later duplicate this tab sequence with the menu entry "Text templates / Add format template PosP" on one or multiple lines.

Practice with the PosP tab sequence

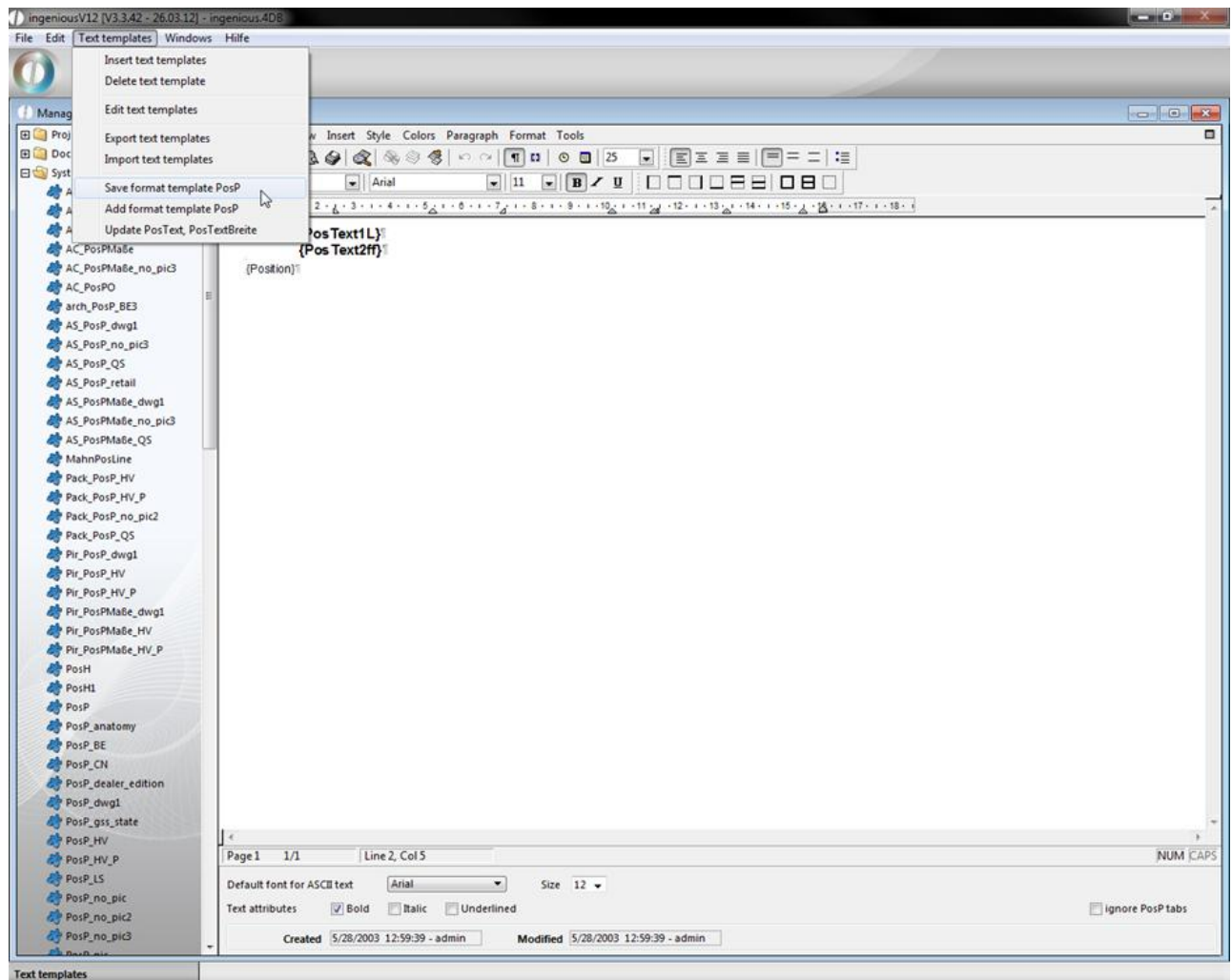
1. In the text template administration, select the text module "PosH1" from the "System modules" folder and click on the button in order to reach the text templates in the editing mode.

If you now place the mouse's cursor in the second line, you get the different tabs (sum = tab sequence) indicated in the ruler.

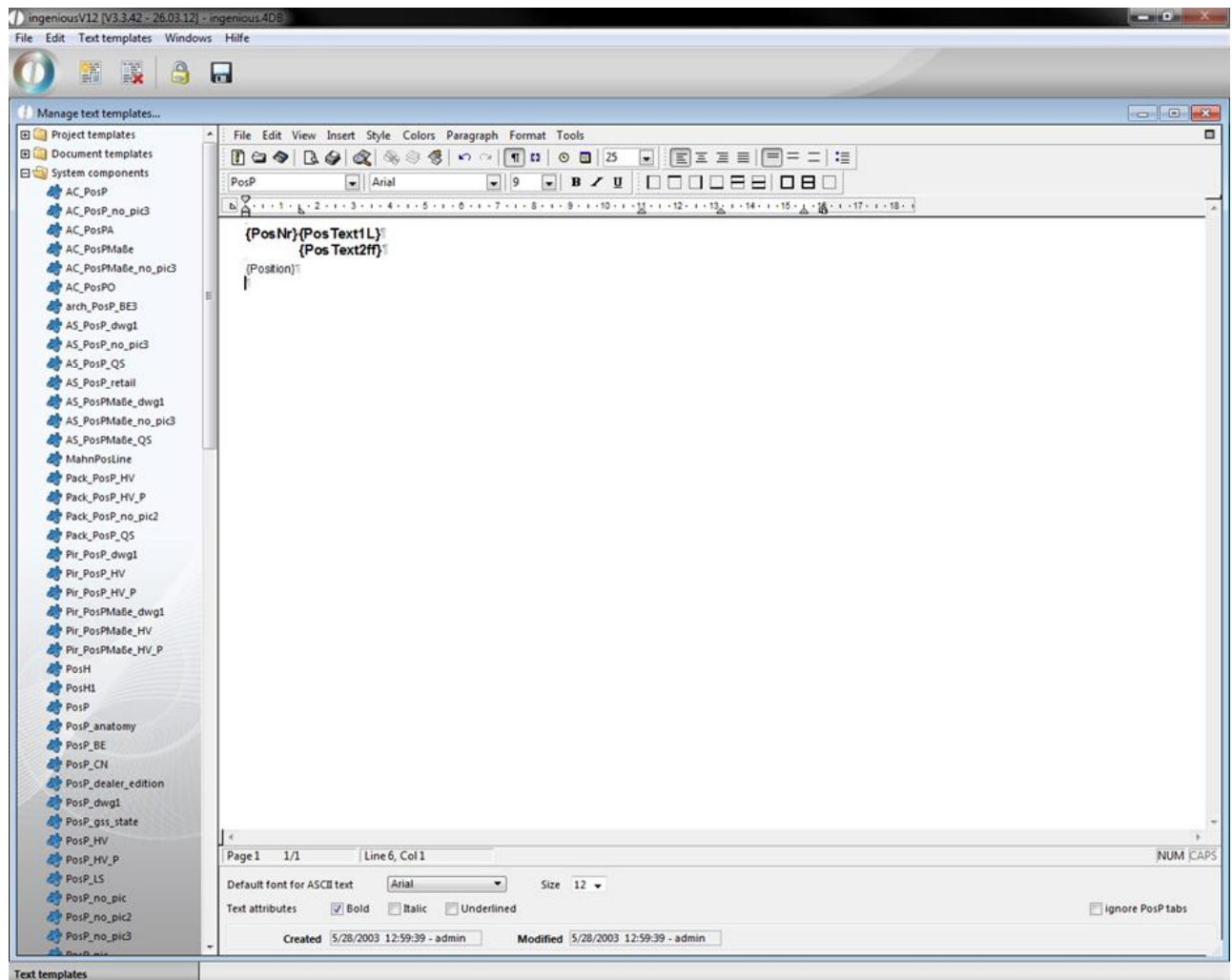


Choice of a text template

2. Save the tabulator sequence with the menu item „Save Text templates/Format template PosP“.



3. Now place the cursor behind "{Position}" and create a new line with the help of the Enter key (↵).
4. If available, remove complete tabs from the ruler.

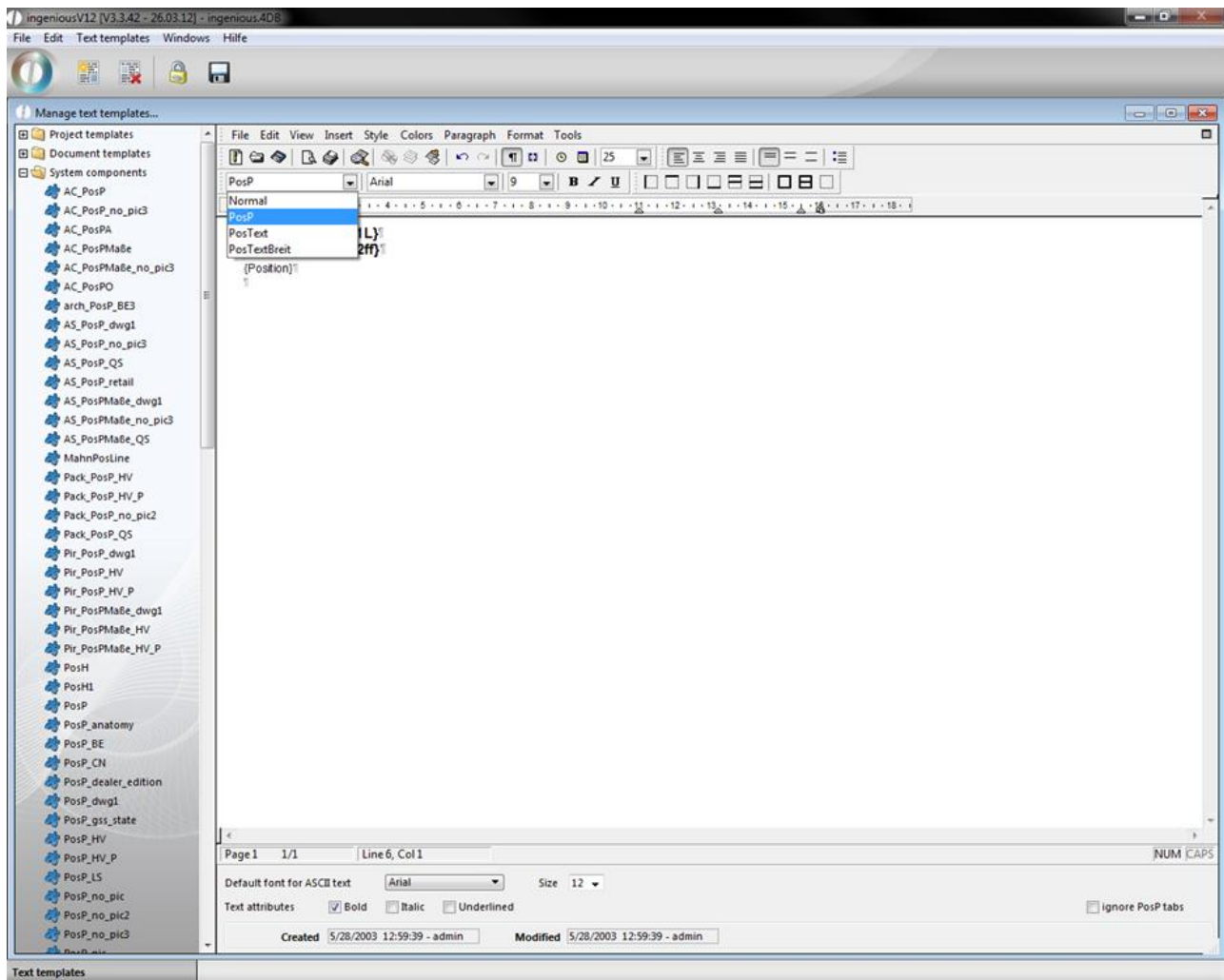


New line with a blank tab sequence

- Now choose the menu entry "Text templates / Add format template PosP" to set the saved tabs in this line.

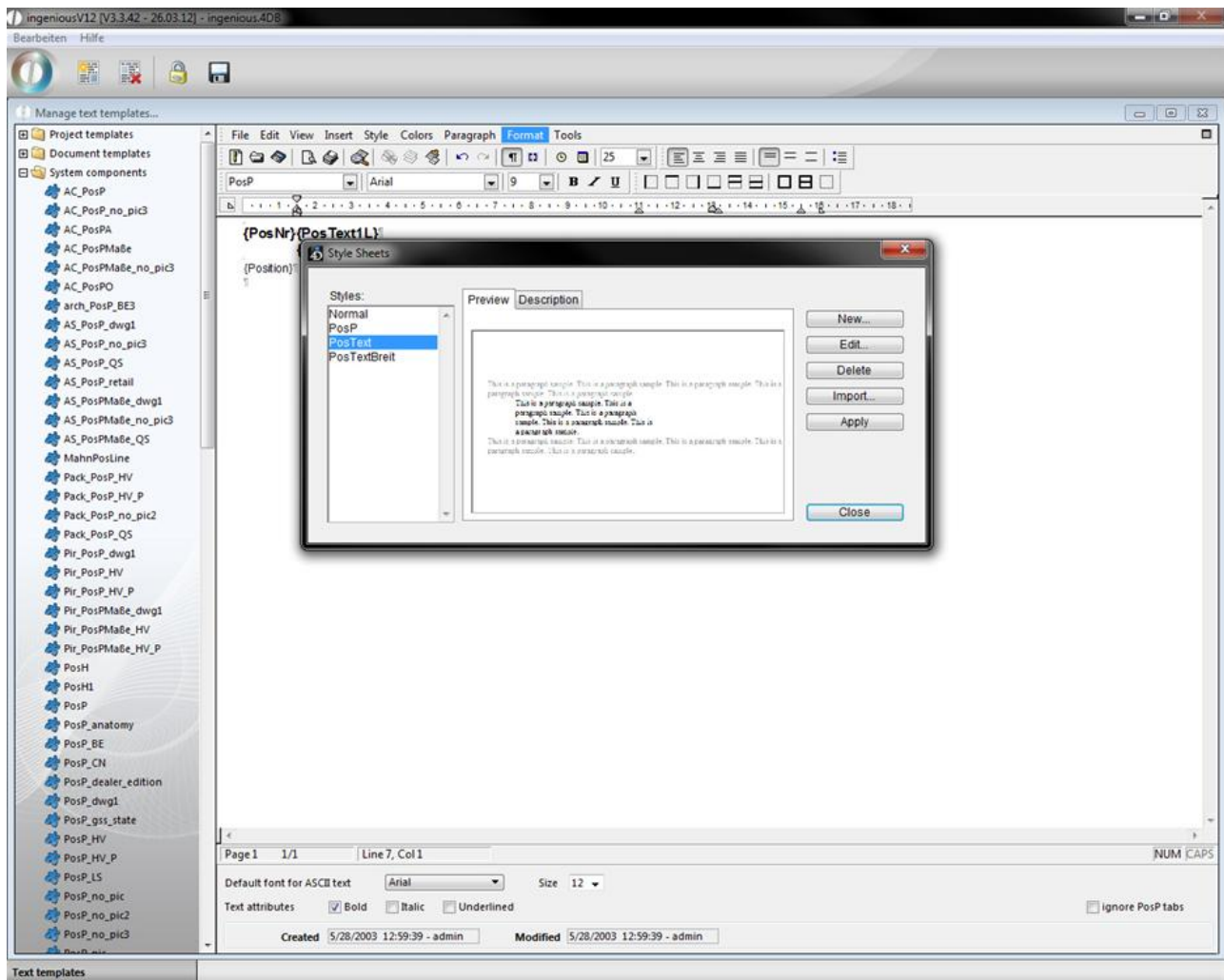
Update PosText, PosTextWidth

The menu entry "Text modules / Update PosText, PosTextBreite" adds the style templates "PosText" and "PosTextBreite" to the already existing "Normal" and "PosP".



Menu according to update PosText, PosTextWidth

You can create, edit, delete and apply your own style templates under "Format / Style sheets ...".



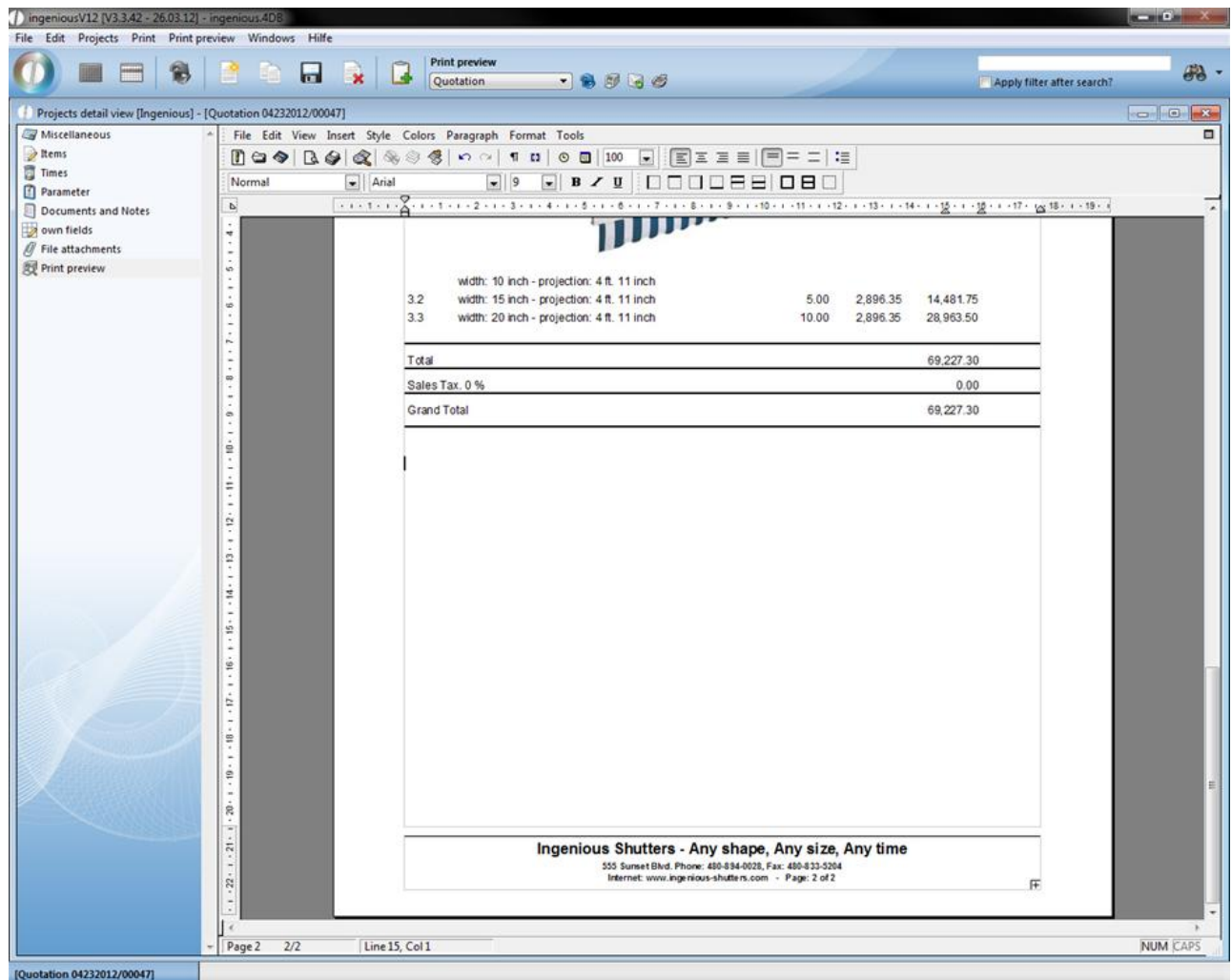
The import of style sheets is also possible in this menu.

The application of text templates

The sense and the purpose of a text template is to save the user from constant paperwork, such as reminders, for example. For this reason, the procedure to insert a text module into a document was made as easy as possible in Ingenious.V12.

There are two ways to insert a text template.

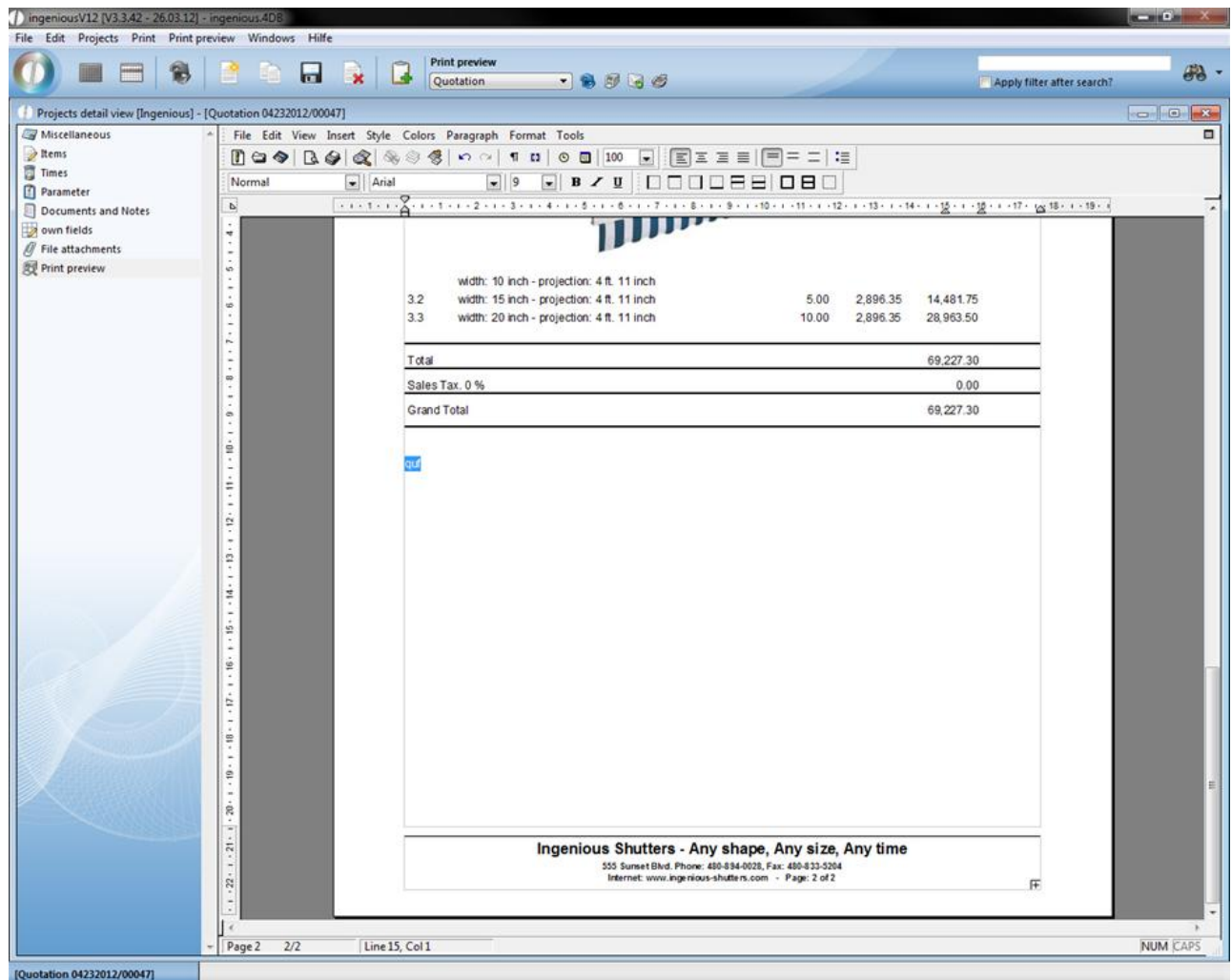
1. With the cursor, go to that part of the document in which the text template should be inserted.



Positioning of the cursor

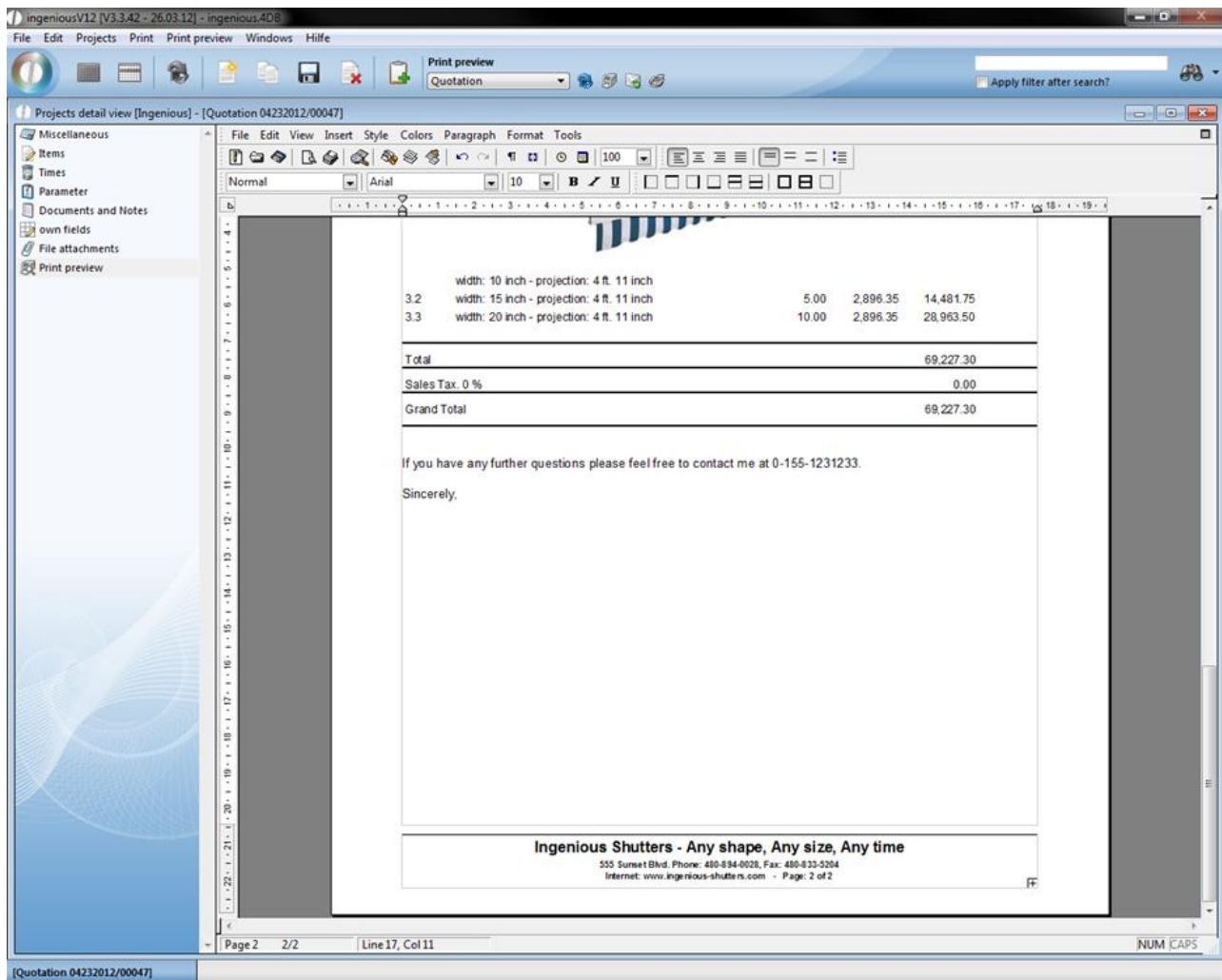
Option 1 :

- If you know the name of the text template, enter it now in the text, i.e., "quf".



Entry of the text module description

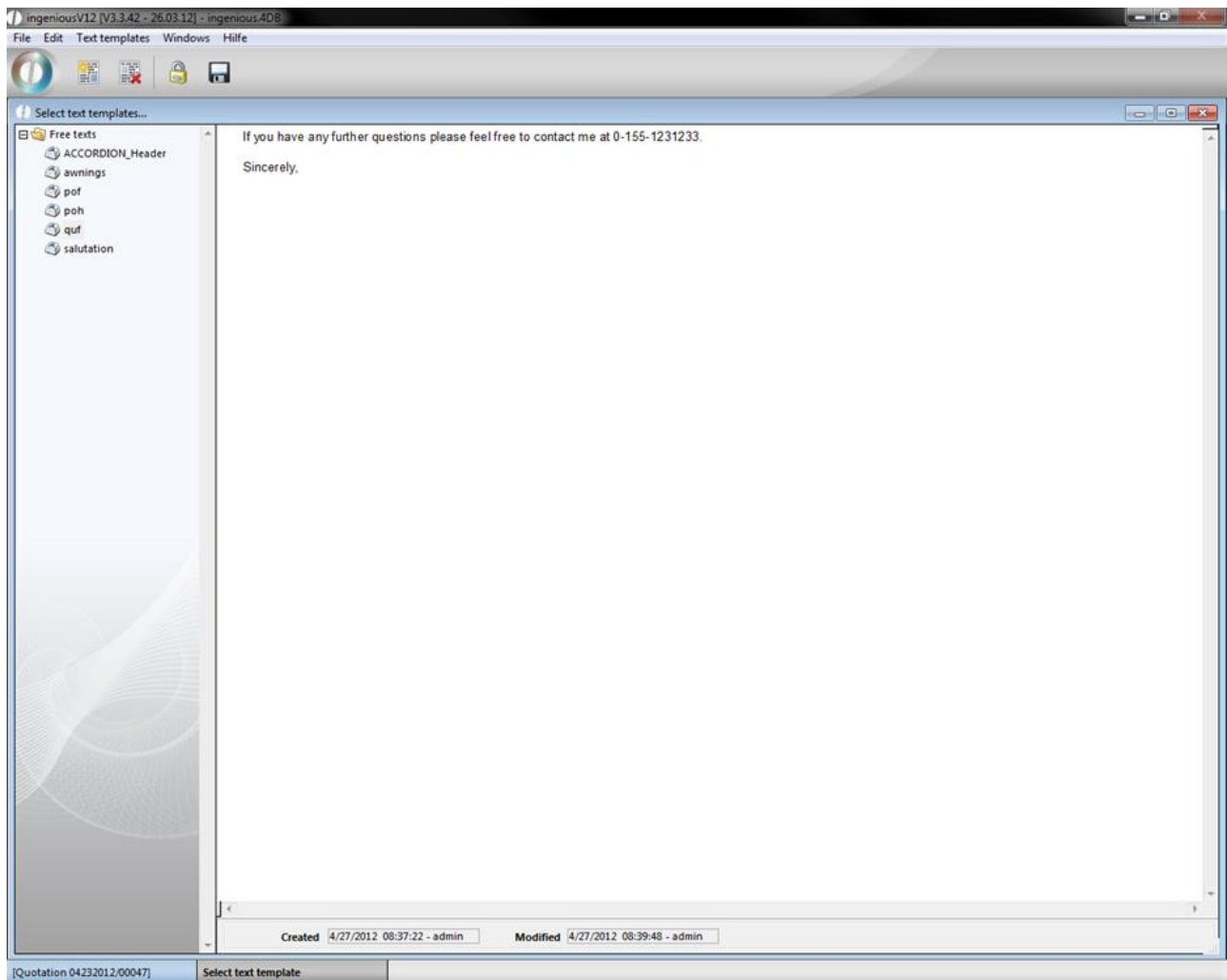
- Now press the F3 key on your keyboard in order to direct ingenious.V12 to enter the text module.



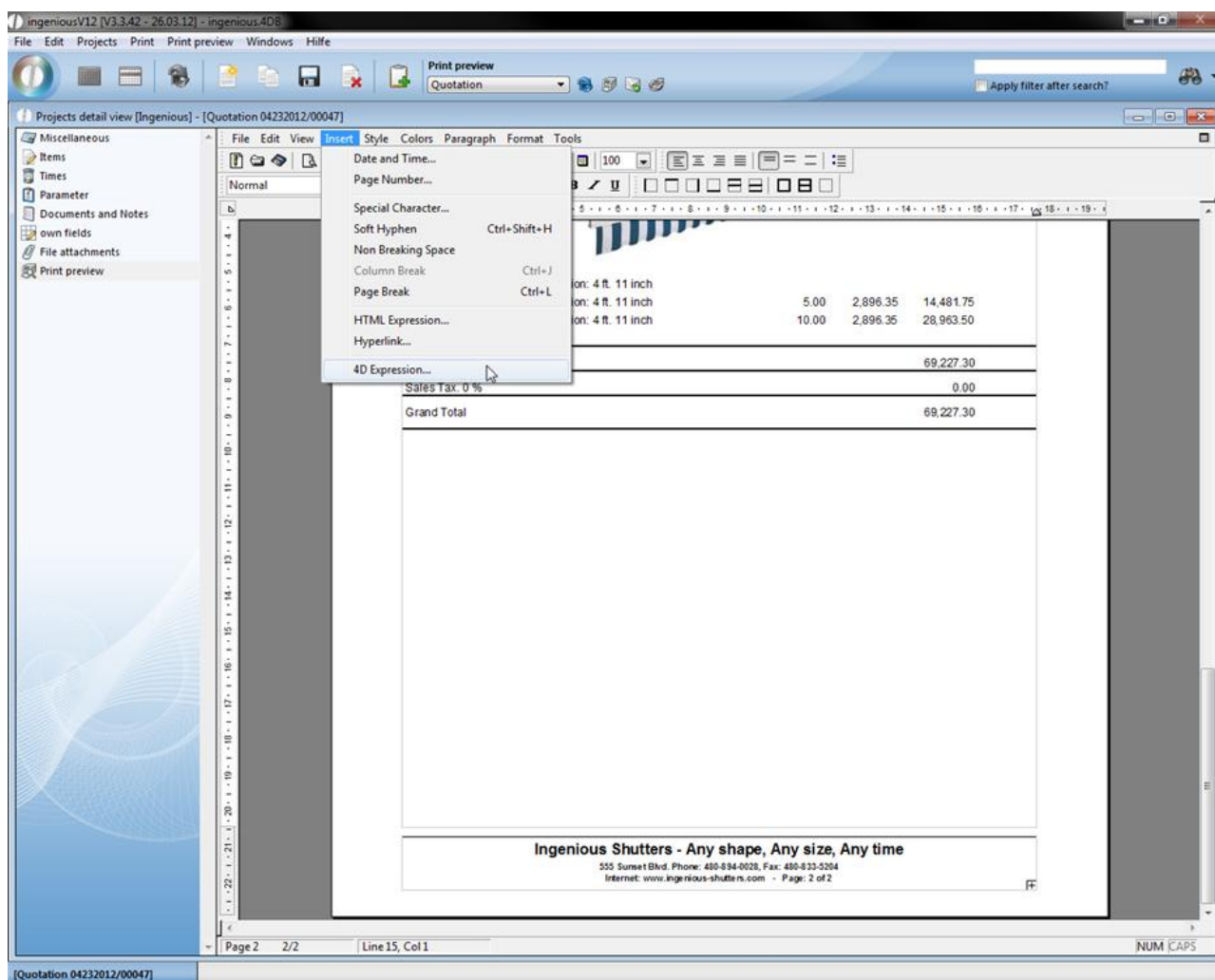
The text module is automatically started and closed by ingenious.V12.

Option 2:

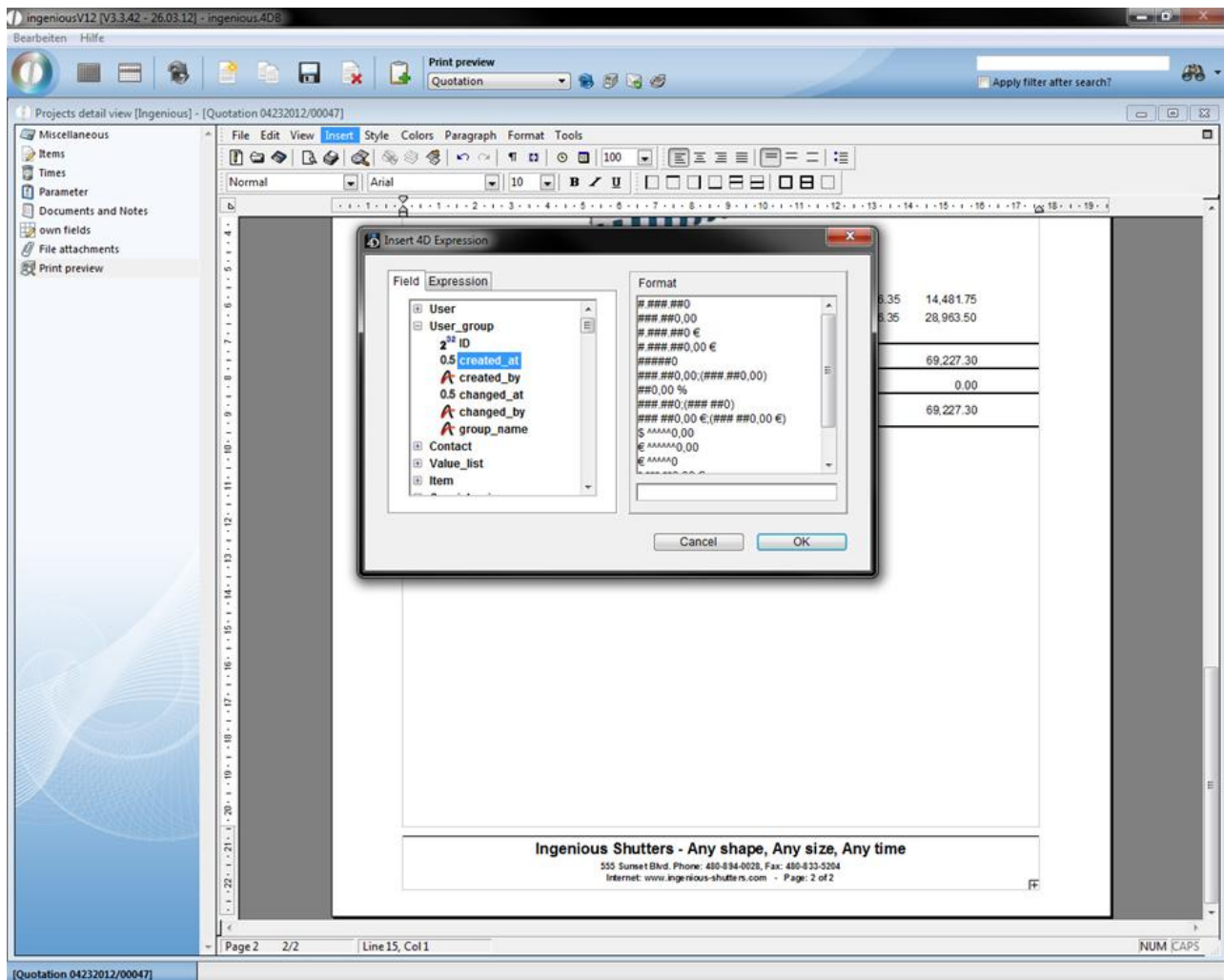
2. If you do not know the name of the text module, now press the F3 key of your keyboard.
3. The window "Text template administration..." opens in which all free texts from ingenious.V12 are listed. Select the desired text module with the mouse and double click it.



The text template administration closes again and the selective text module appears at the suitable place in the document.
4D expression and references



A "4D Expression" serves to incorporate values of fields from the database into the document. They therefore create a reference to the Ingenious.V12 database. This is very helpful, i.e. with serial printing and with the creation of calculations. If you select "Insert / 4D Expression", the window "Insert 4D Expression" automatically opens. If you have entered a printout, you can show the references with the "Display/References" menu.



Subsequent example with discount invoices:

a) with Ingenious.V12 placeholders

Payable within {NetPaymentTerm} less days from {Discount} % discount (discount amount:{DiscountTotal})Please transfer the following value: {totalEUR}-{DiscountTotal}.

b) with the help of "4D Expression" and "References" from the database

Payable within «[Main Projects]Net payment term» less days from «[Main Projects]Discount» % discount(discount amount: «[Main Projects]Discount *[Main Projects]Gross_EUR/100:###.##0,00 €»). Please transfer the following amount: «([Main Projects]Gross_EUR*1,16/100)*(100-[Main Projects]discount):###.##0,00 €».

Shown in the closed project:

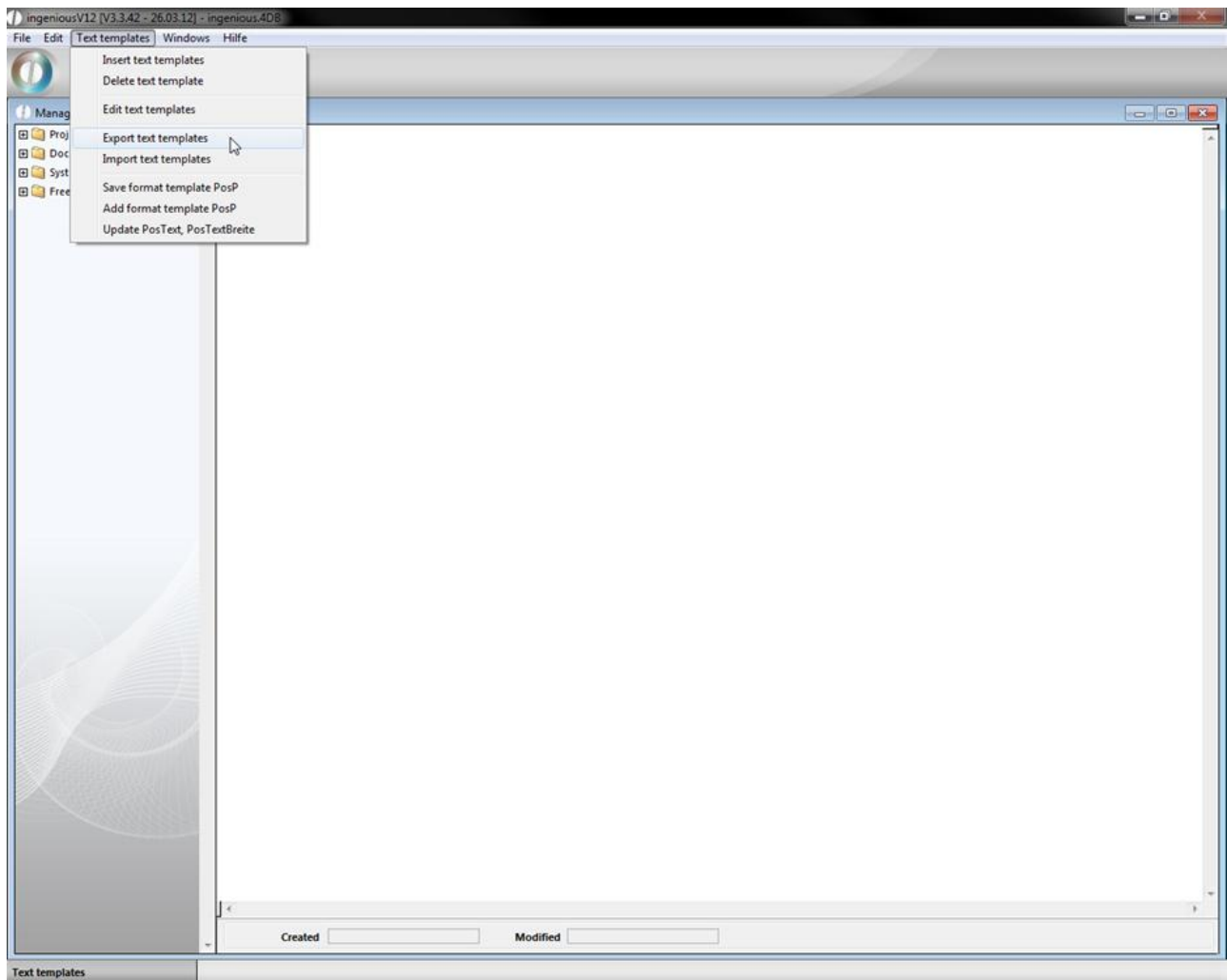
Payable within 10 days less 2% discount (discount amount: 2.32€). Please transfer the following amount: 131.86€.


Export and import of text templates

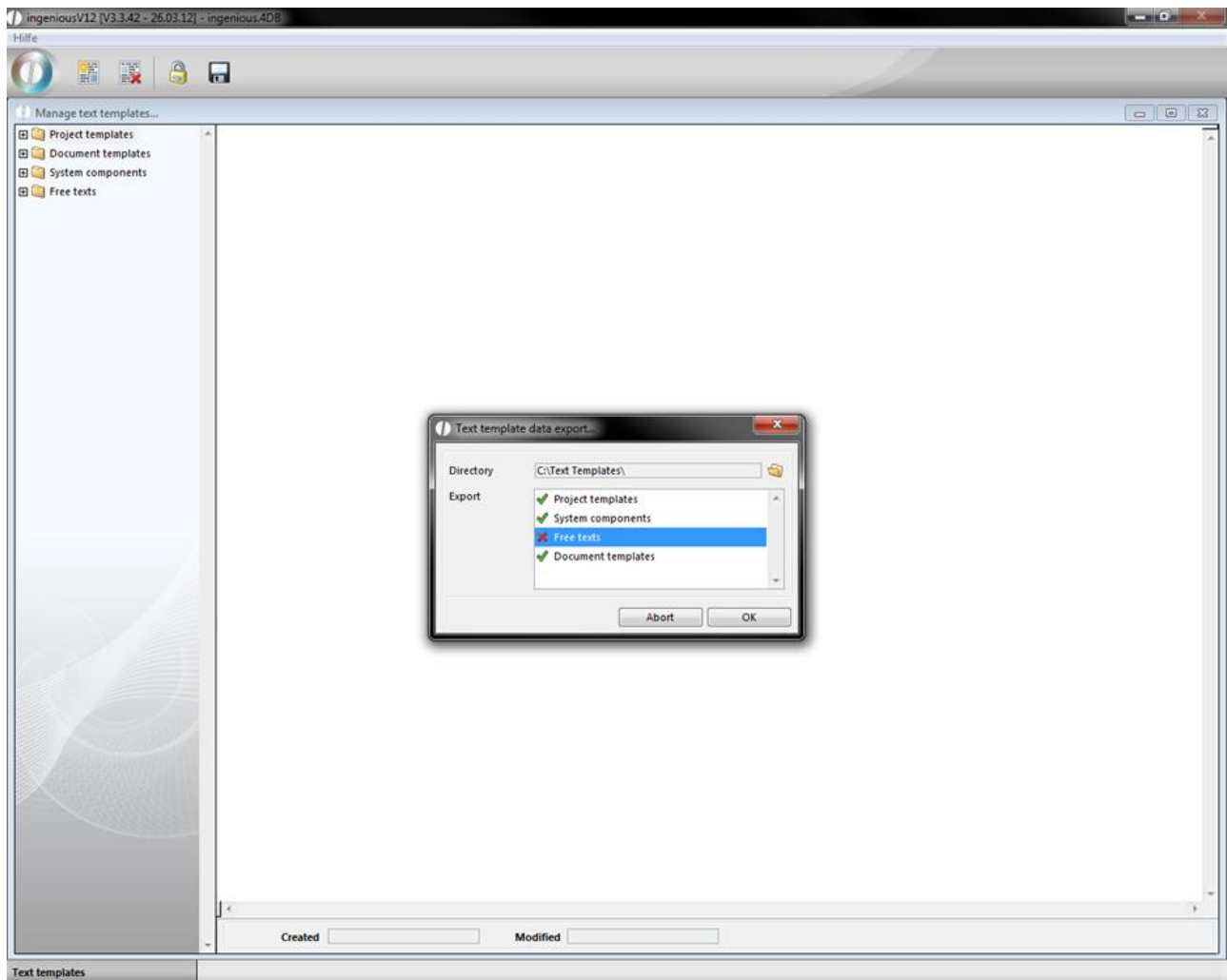
Of course exporting or importing text templates is also possible in Ingenious.V12.

Exporting text templates

Indeed, no single text template can be exported, but only complete folders with text modules, such as "Project templates", "Document templates", "System components" or "Free texts" can be exported. In order to do this, please select the entry, "Text templates / Export text templates" in the main menu in the open text template administration.




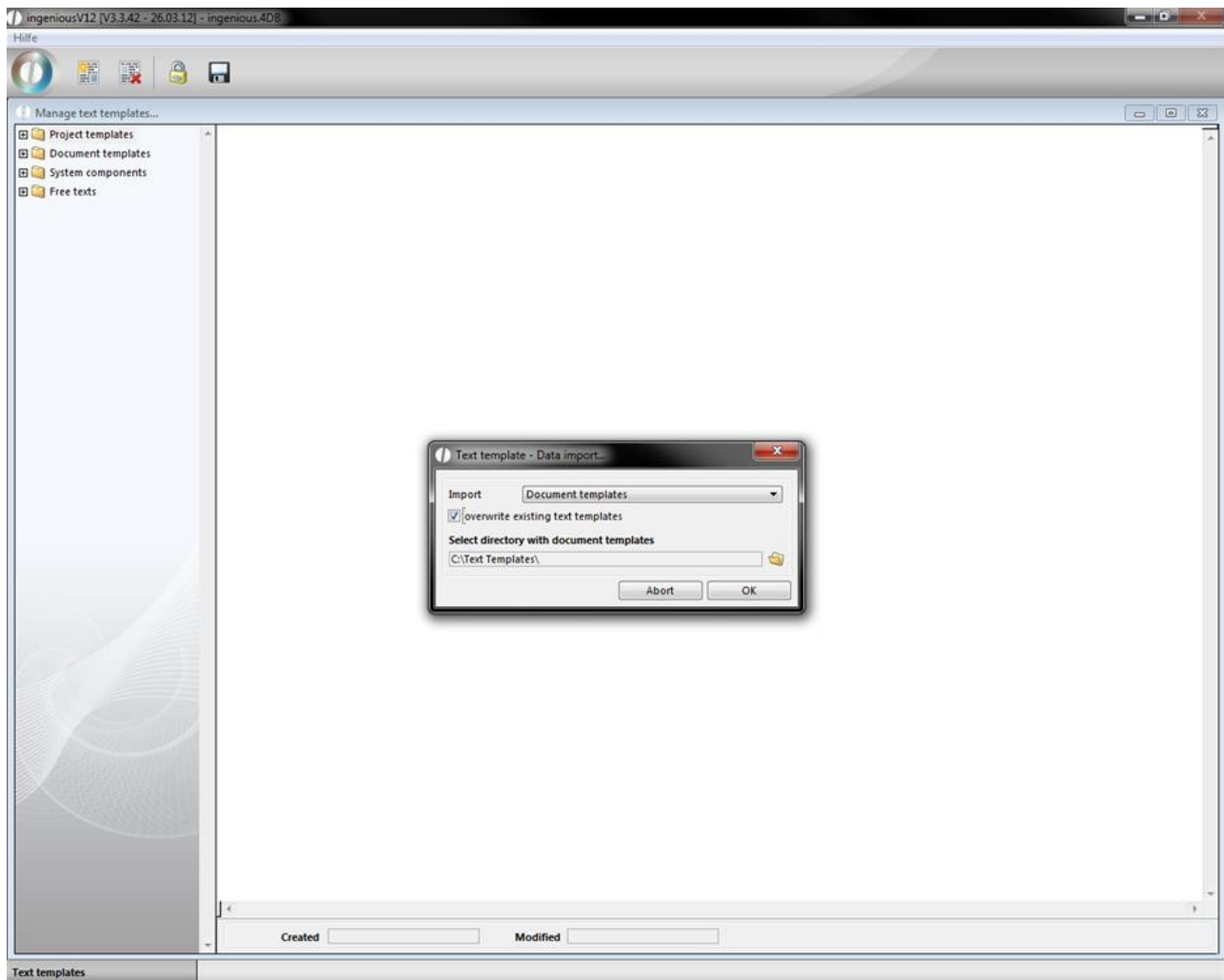
In the next window, first select the target folder in which the text modules should be exported, with the help of the  button and the next window that follows. In addition, you still have the choice as to which folders ("Project templates", "System components" or "Free texts") you want to export. Normally all folders are provided with a green checkmark. In order to exclude one or several folders from the export, simply click on the respective entry, so that the checkmark located before it changes into a cross. Now you must click only the button "OK" and the export begins.



Note: Export of data is similar to the copying of data. This means the data are still found in your system, they are not shifted or are not even deleted.

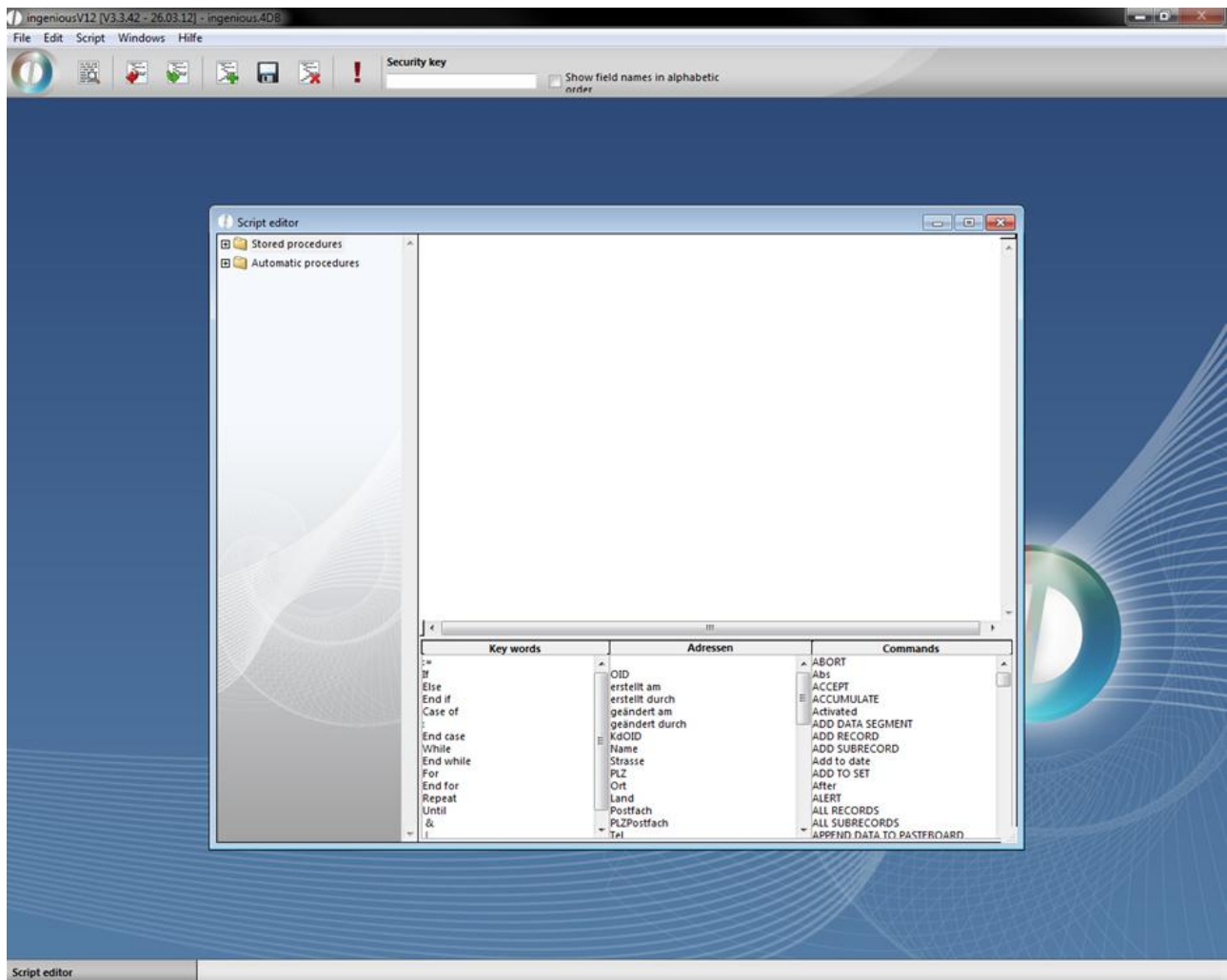
Importing text templates

The import of text modules differs only slightly from the export. Next select the main menu entry "Text templates / Import text templates" with the opened text template administration. The window that appears differs only by the pop-up field "Import" and the selection field "Overwrite existing text templates" from the text templates export window. Now one provides a path with the  button by which the text templates should be imported. Only complete folders ("Project templates", "System components", "Free texts") can be selected. With the selection field "Overwrite existing text templates", you determine whether your already available text templates should perhaps be substituted (overwritten) or not. The text template import is started with the "OK" button.

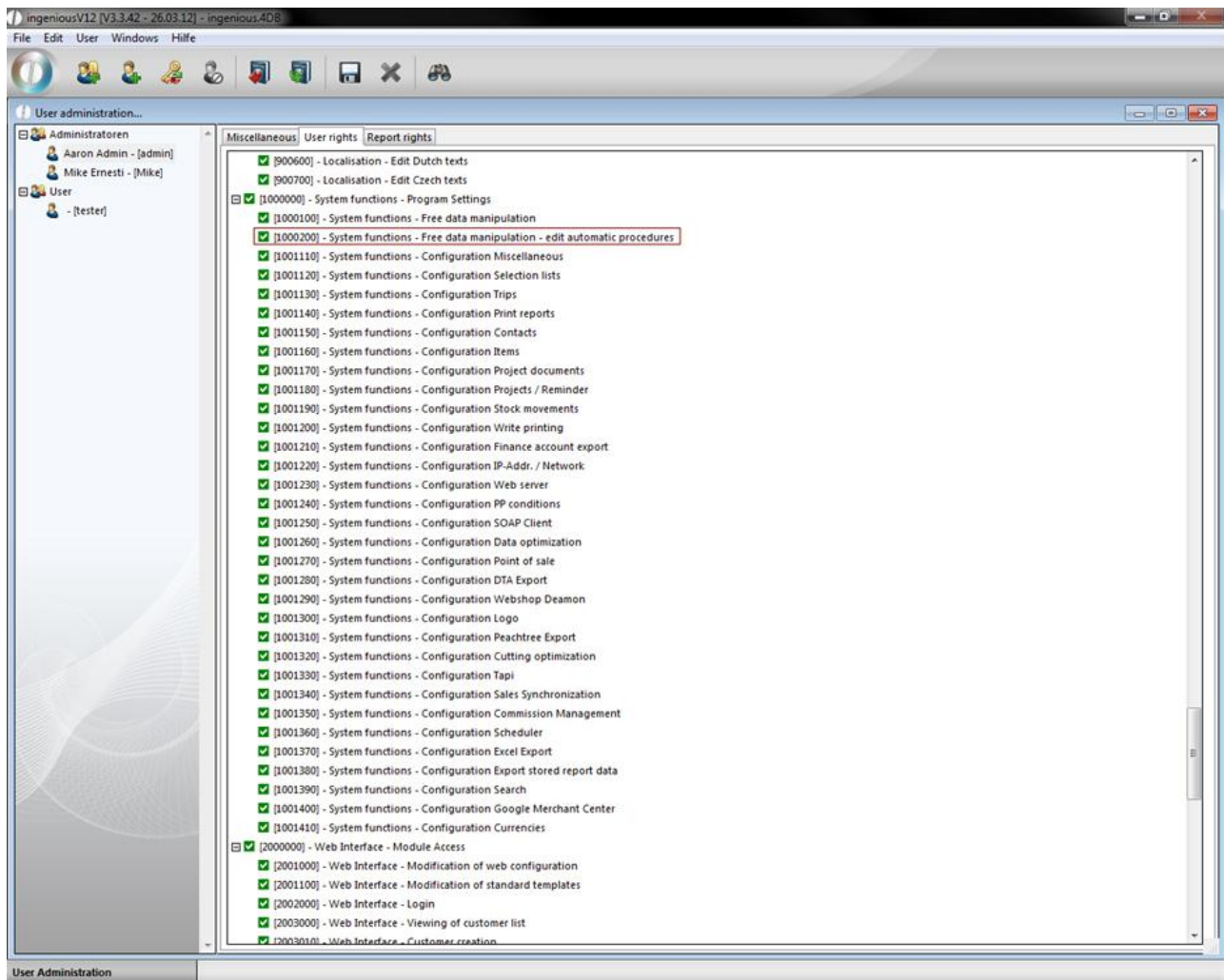


6.3 Free data modification

The "Free data manipulation" is one of the most powerful tools of Ingenious.V12. The "Script editor" offers all possibilities to be able to create and explain scripts quickly.



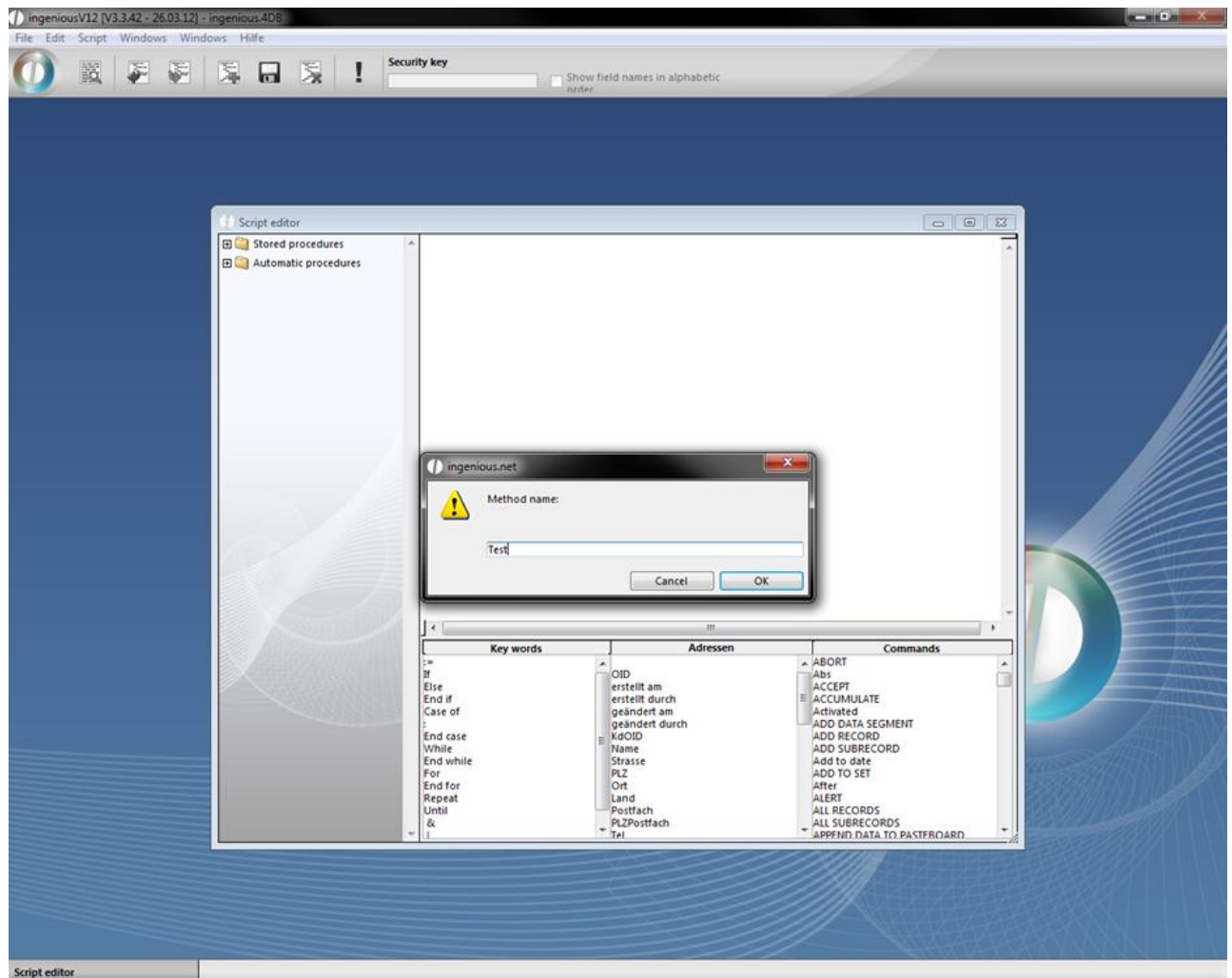
Ingenious.V12 contains two types of scripts: stored procedures and automatic procedures. The difference lies in the usage and execution of the scripts. Whereas stored procedures can be assigned generally to a module and can be executed in the list view, automatic procedures can be assigned to a specific work step of a module and will be executed, when this work step happens. For instance after opening a module, saving a function or executing a search or print action. To create and modify automatic procedures the specific user right has to be enabled.



The following practice will show an example for a stored procedure. The usage of the automatic procedures is done analogue.

Practice creating scripts

1. Click on the button in order to create a new script.
2. Next give the script a method name



Window for naming a script

3. Create your script in the script area.

CW_SetPrefs

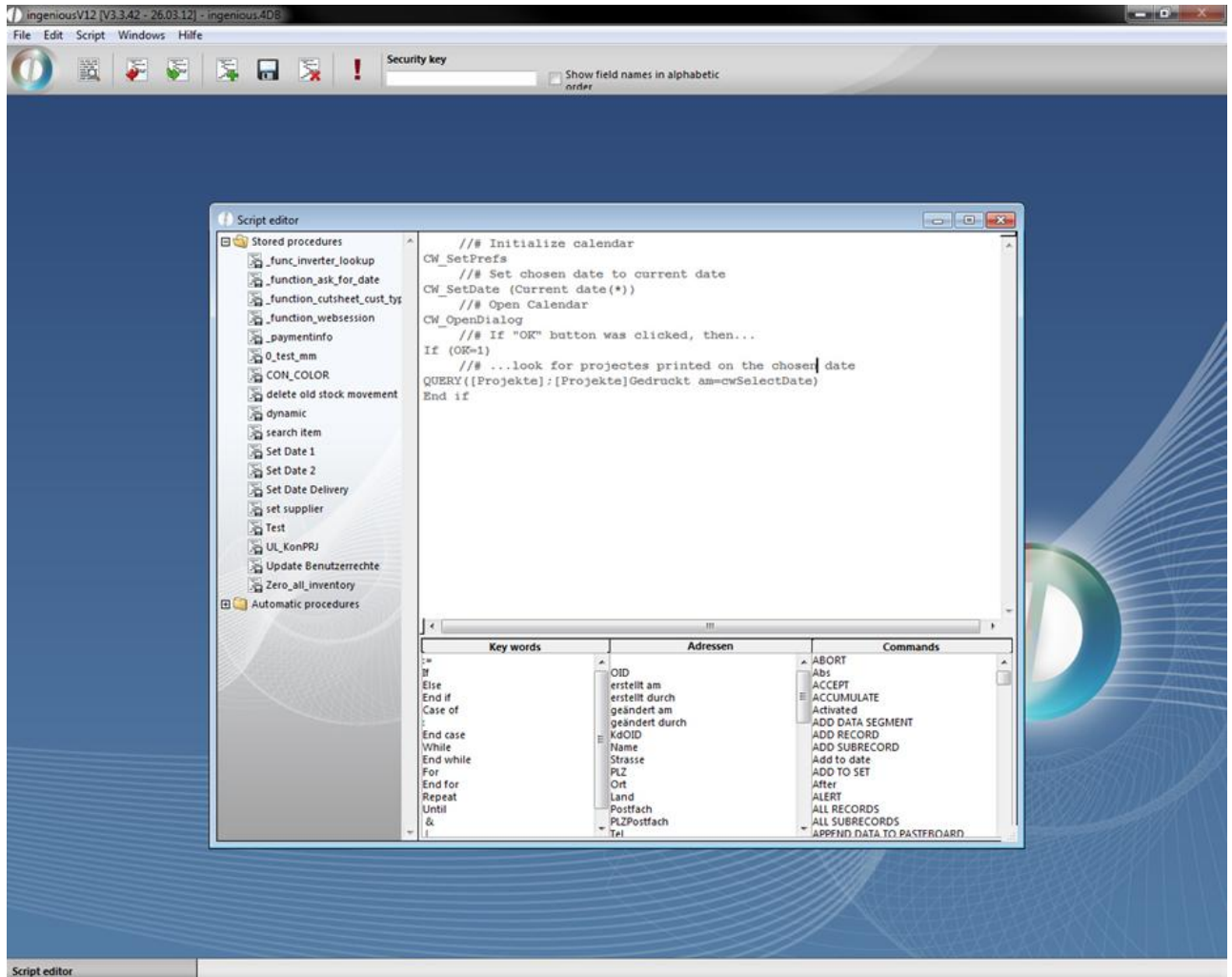
CW_SetDate (Current date(*))

CW_OpenDialog

If (OK=1)

QUERY([Projekte];[Projekte]Gedruckt am=cwSelectDate)

End if



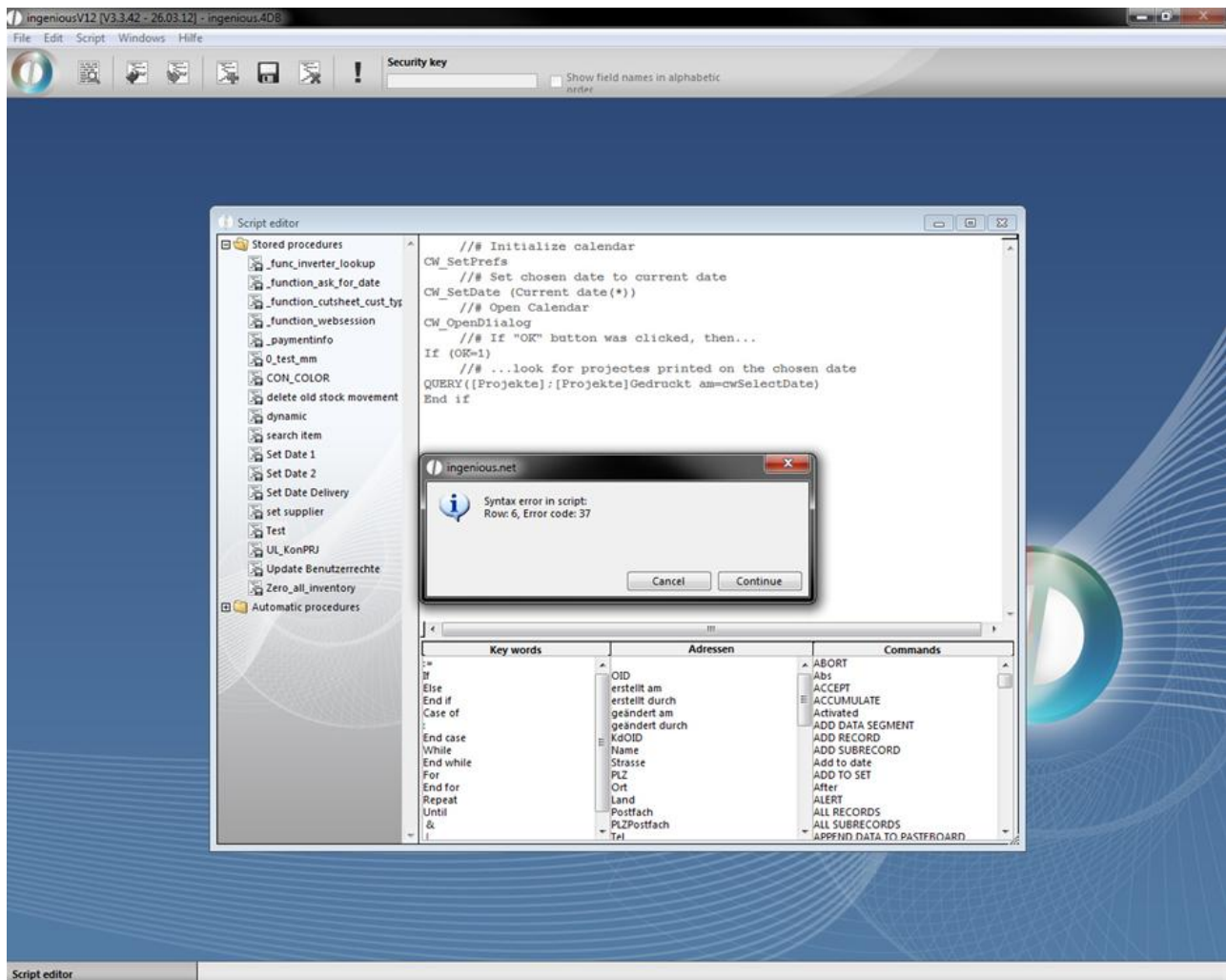
You can arrange scripts either with the keyboard input or by clicking on key words, addresses and commands.

4. Secure your script with the button, before you run it for the first time.
5. In order to start the script later, a click on the button suffices.

Scripts that change data (deleting, creating and updating records), are automatically recognized by Ingenious.V12 and their execution is permitted only with a security key. You get this unique release code after checking the scripts from Ingenious GmbH. Pay attention to the fact that only people with enough specialized knowledge can create and execute scripts.

Warning: Scripts allow access to internal data that is outside of the Ingenious.V12 user rights.

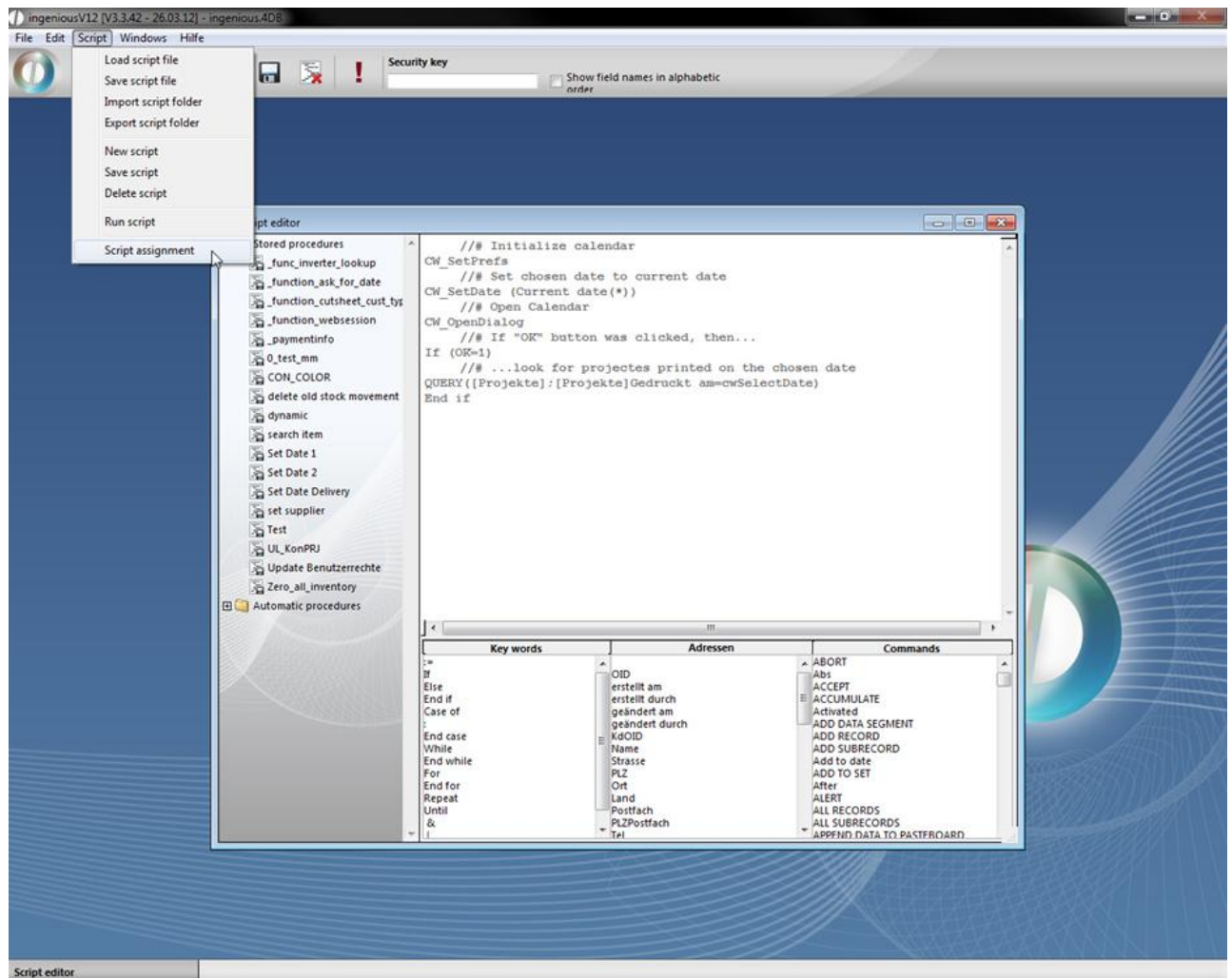
If something is wrong with the script the following error message will be displayed. You can abort the procedure and correct the script.



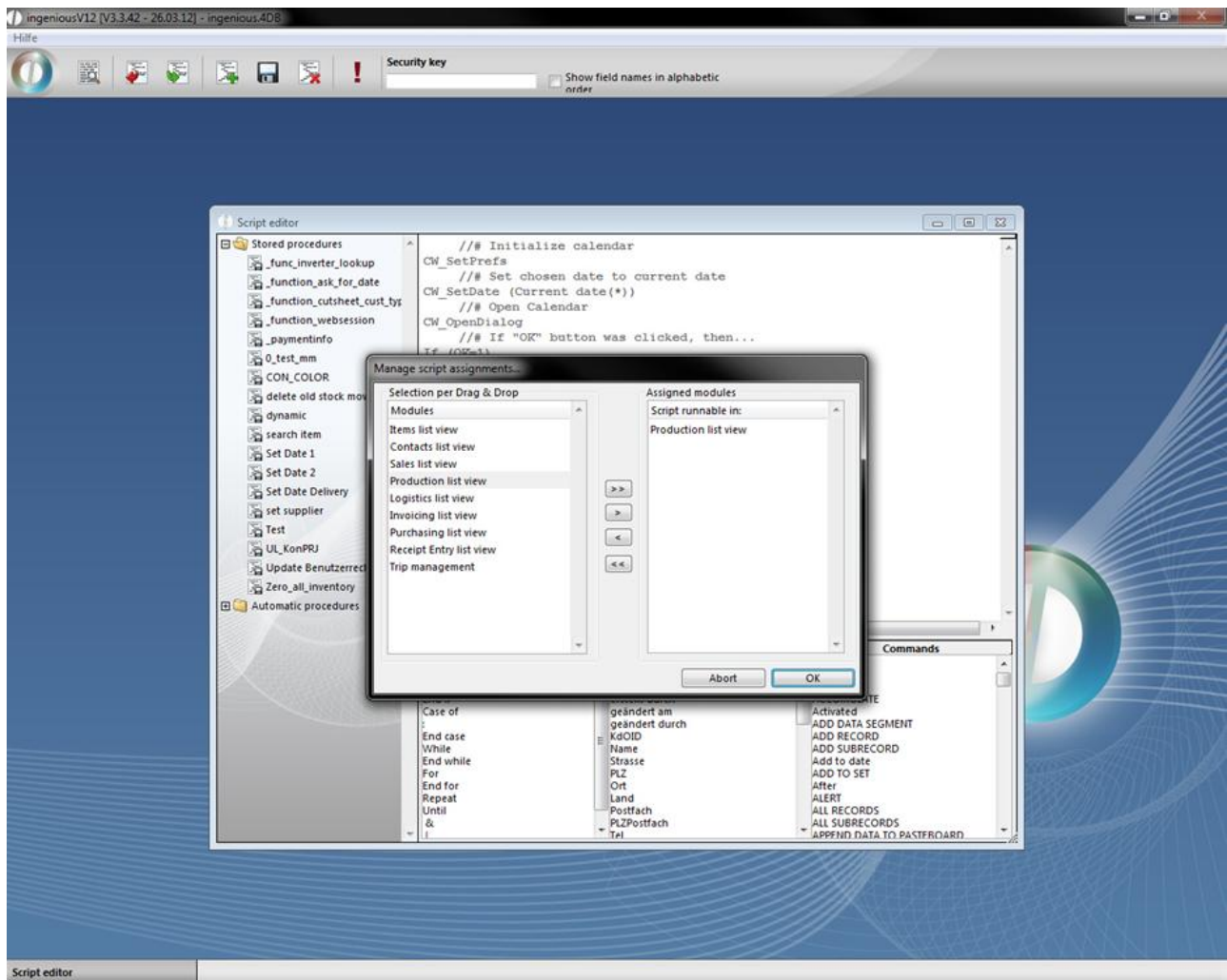
Furthermore, it is possible to assign the scripts to certain modules. Therefore only the people who also own the suitable module rights can execute the scripts.

Practice assigning scripts

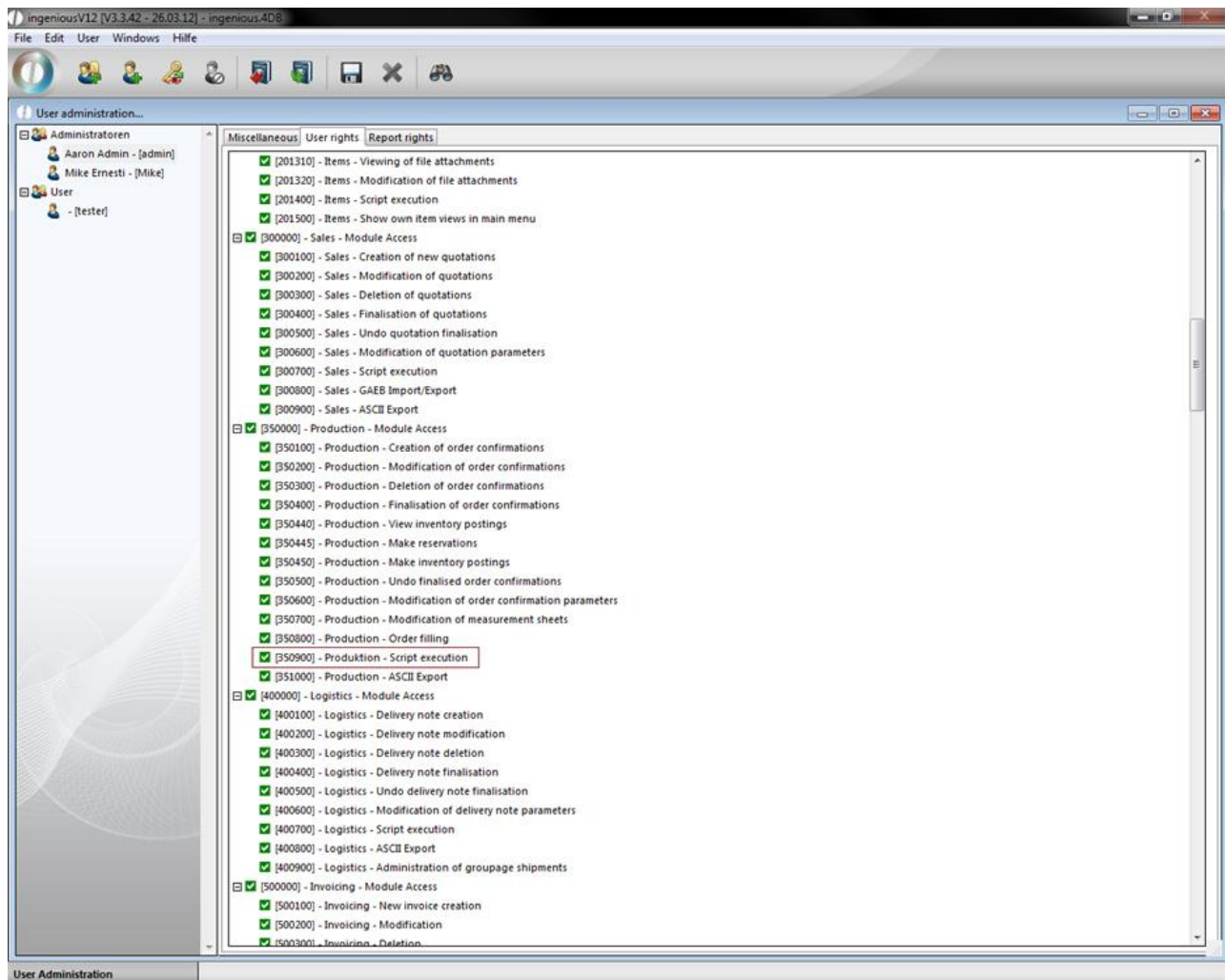
1. Mark the script "Demo-Script1" and select the menu "Script/Script assignment".



2. Assign the desired modules to the script with the Drag & Drop and click on the "OK" button.



Now the scripts are entitled to everybody with the suitable module right. The rights allocation occurs in the tab "User rights" of the user administration.



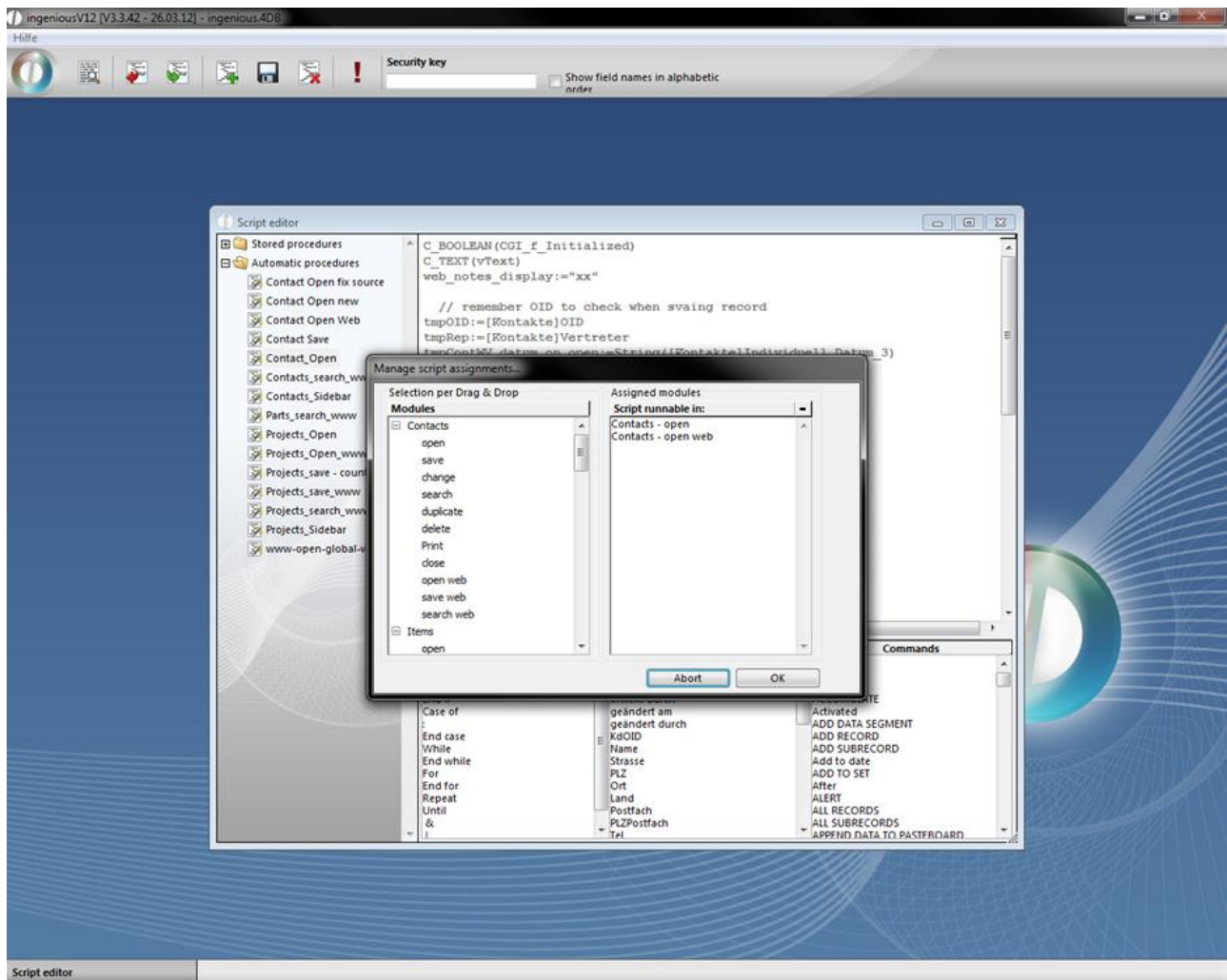
Rights allocation for the "Invoicing" module

A new folder "Scripts" is available to the authorized user in the list view of the module. Here the user finds all scripts available to him. The execution occurs only by clicking the scripts. In order to test a script from Ingenious GmbH, it must be exported first.


The screenshot displays the 'ingenious.V12' software interface. The main window shows a 'Workflow List view' of project documents. The table lists various documents such as 'Credit note', 'Invoice', 'Quotation', and 'Combined invoice' with columns for DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and Paifin. The left sidebar contains filters for Project filter, Status filter, View filter, and Trip. A calendar pop-up is visible over the table, showing the month of April 2012.

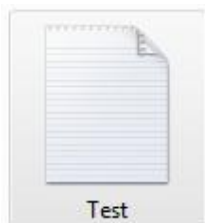
Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Credit note	04262012/00003	04/26/12		Peter Pahn USA-		6.61 \$	6.61 \$					
Credit note	04262012/00002	04/26/12		Peter Lustig USA-		9.45 \$	9.45 \$					
Invoice	04262012/00049	04/26/12		Peter Lustig USA-		51.85 \$	51.85 \$					
Invoice	04262012/00048	04/26/12		Peter Pahn USA-		36.29 \$	36.29 \$					
Quotation	04232012/00047	04/23/12	test 54	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$						
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Quotation	04232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$					
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Quotation	03272012/00040	03/27/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$						
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					
Quotation	03232012/00038	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$						
Quotation	03232012/00037	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		763.20 \$						
Quotation	03232012/00036	03/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		0.00 \$						
Credit note	03162012/00001	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	1,598.70 \$					
Quotation - HV	03162012/HV000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		3,738.00 \$						
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	0.00 \$					
Quotation - Roll	03162012/Roll000	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation - HV	03142012/HV000	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,526.40 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	55.00 \$						
DummyInvoice	03082012/00037	03/08/12		Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					
DummyInvoice	03082012/00036	03/08/12		The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					
DummyInvoice	03082012/00035	03/08/12		Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					
DummyInvoice	03082012/00034	03/08/12		Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					
DummyInvoice	03082012/00033	03/08/12		Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					
DummyInvoice	03082012/00032	03/08/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					

Attention: When assigning an automatic procedures script, you can define on which work step the script is automatically executed.




Practice exporting scripts


1. In the free data manipulation, you export the script in a text file by clicking on the  button.
The Windows standard window follows to store files.
2. Give the export data a name and set the procedure in motion with the "Save" button.
If you have saved the file, you can now find the corresponding icon.

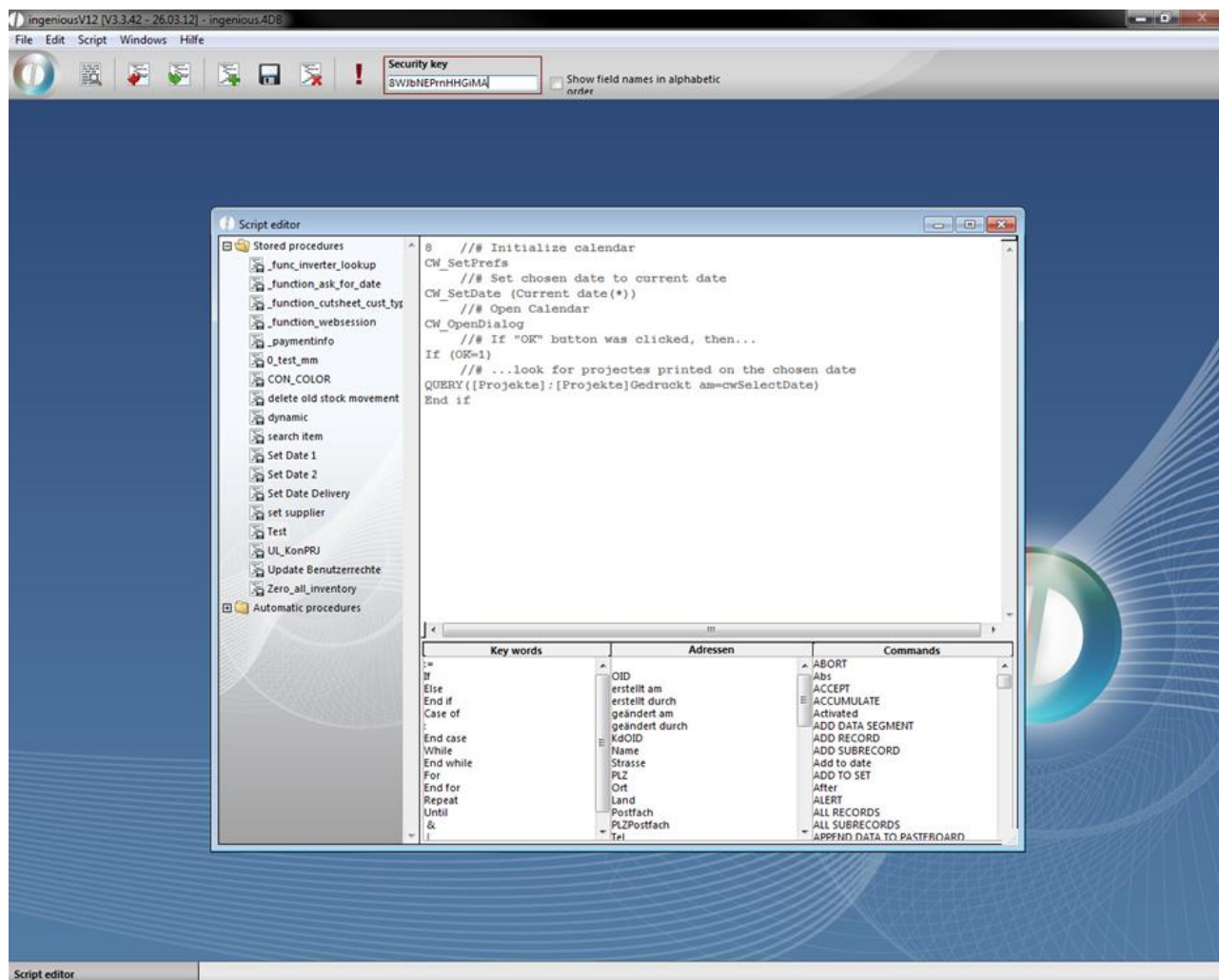


In order to get a security key for this script, send this file to Ingenious GmbH. If your script was corrected, you get a new text file (New Script) and a second file with the security key sent to you.

Practice importing scripts

1. Click on the  button.
2. Open the file in the Windows dialogue.

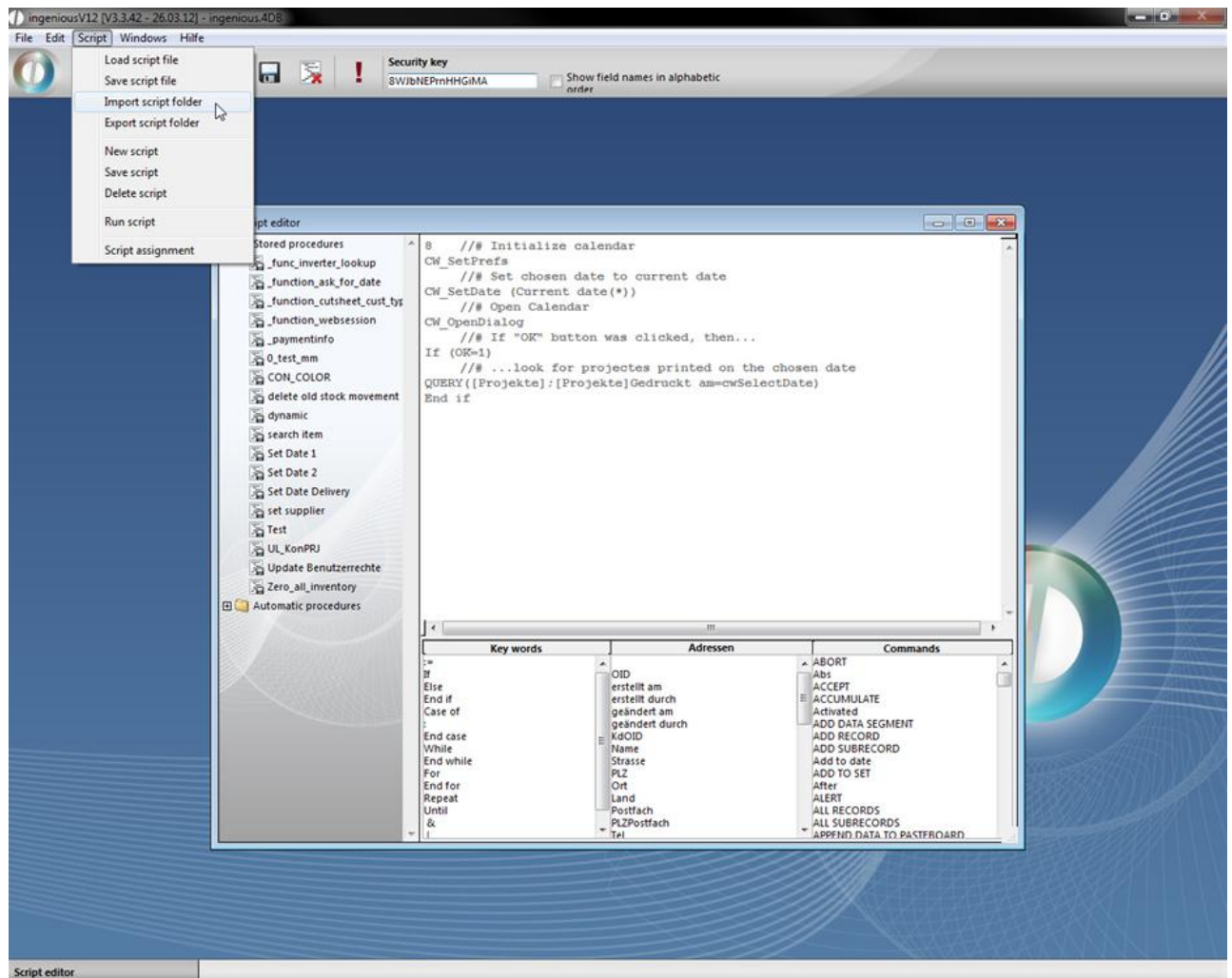
Now you must still enter/copy the safety key in the corresponding field and click on the  button.



In order to execute the script again, you need a new safety key.

Attention: Because these scripts can only be created with internal knowledge about complex correlations in the database systems, only qualified persons should have access to this module. Of course Ingenious GmbH representatives are willing to help with the creation of individual scripts.

With the menu entry Script – Import script folder or – Export script folder you can load or save whole folders.



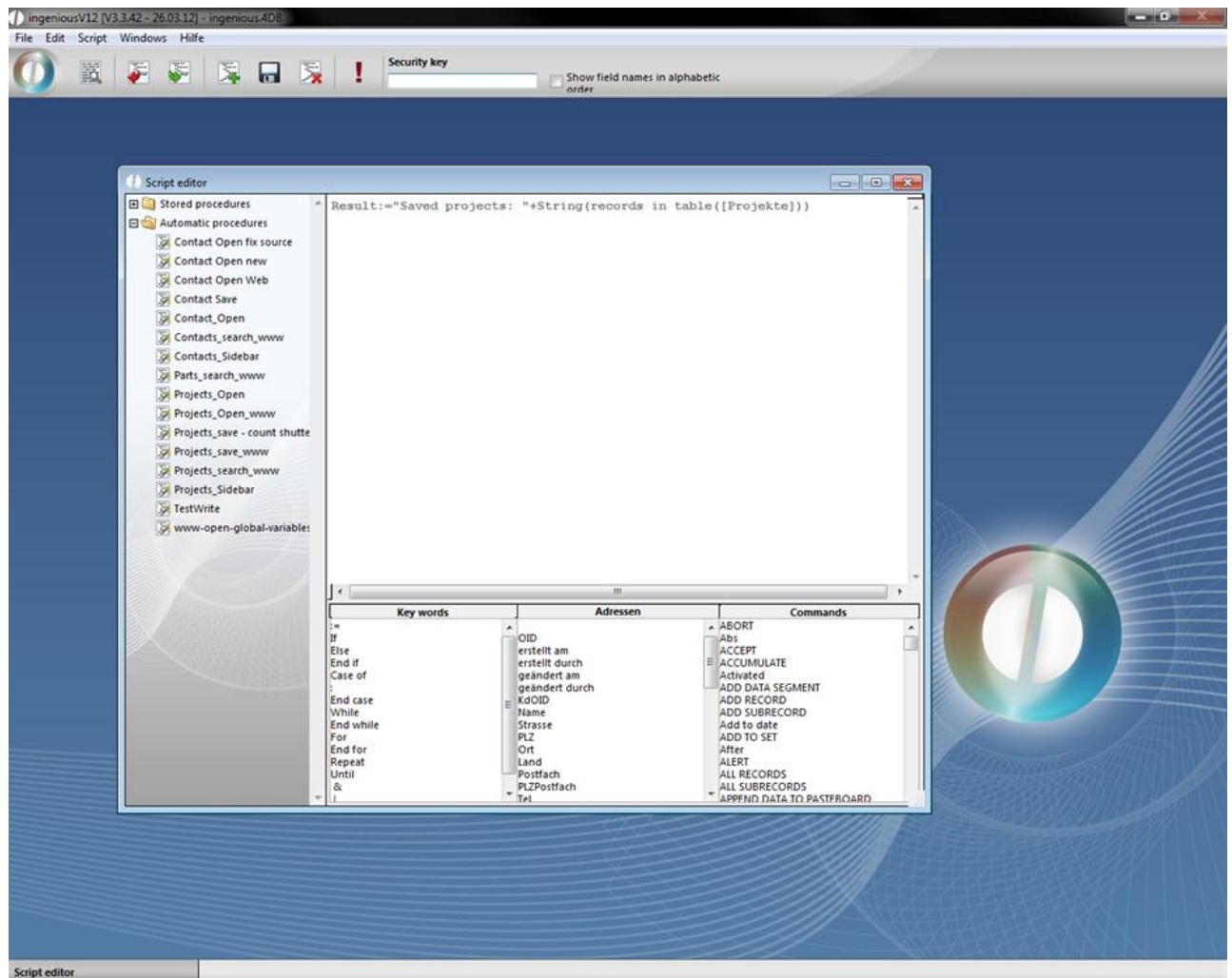
Exec_Script

Exec_Script is an external command to execute scripts in any place that allows 4D code, for instance write and view documents. Exec_script can also be used as a place holder {Exec_Script("script name";"param1";"param_n")}. By this means text templates and script can be composed dynamically, that raises the flexibility of ingenious.V12.

Attention: In this scripts the output command "Result:=" has to be used.

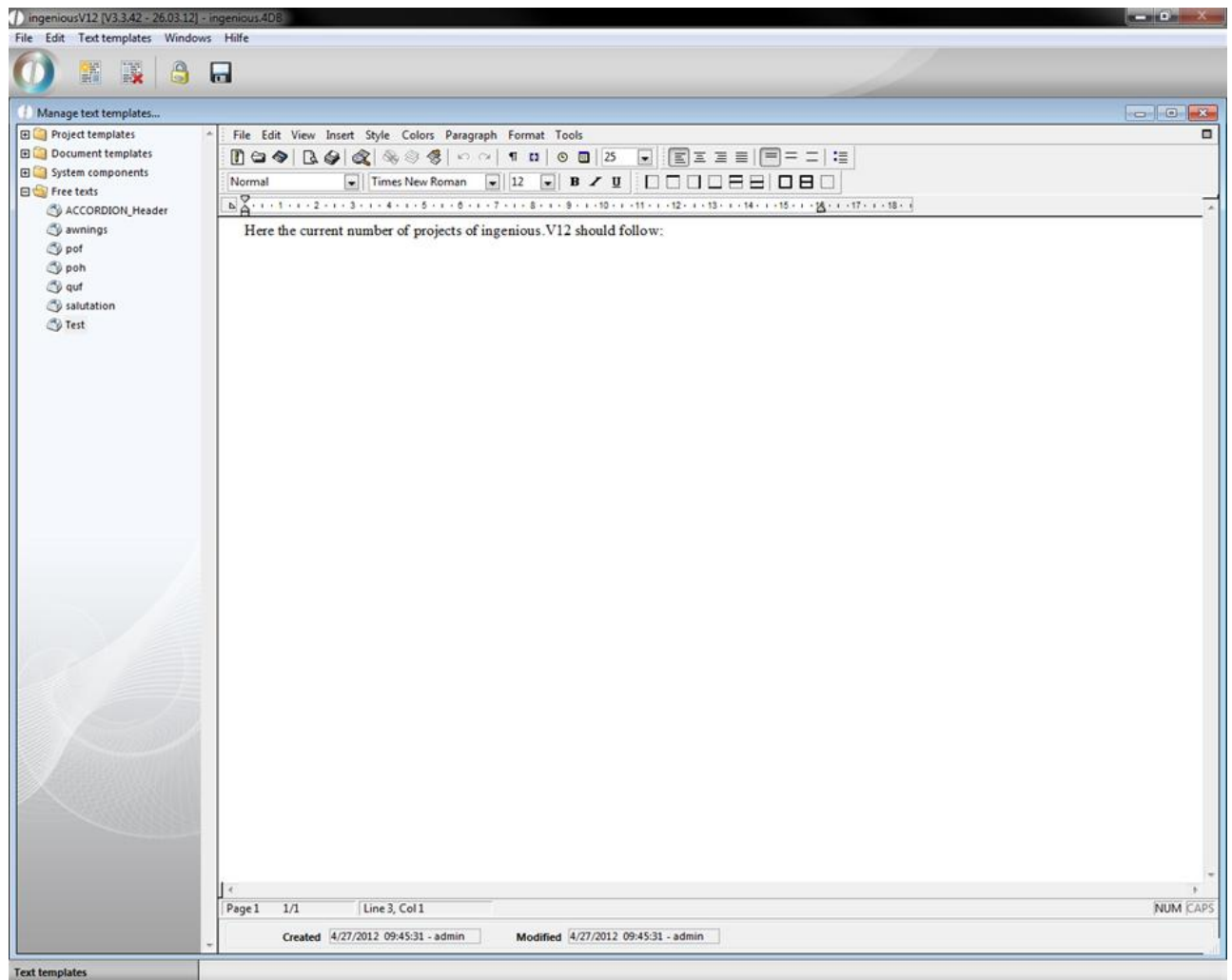
Practice

1. Open the free data manipulation module and add a script to the automatic procedures with the name "TestWrite" and content "Result:="Saved projects: "+String(records in table([Projekte]))". With the help of this script the number of saved projects in ingenious.V12 should be output.

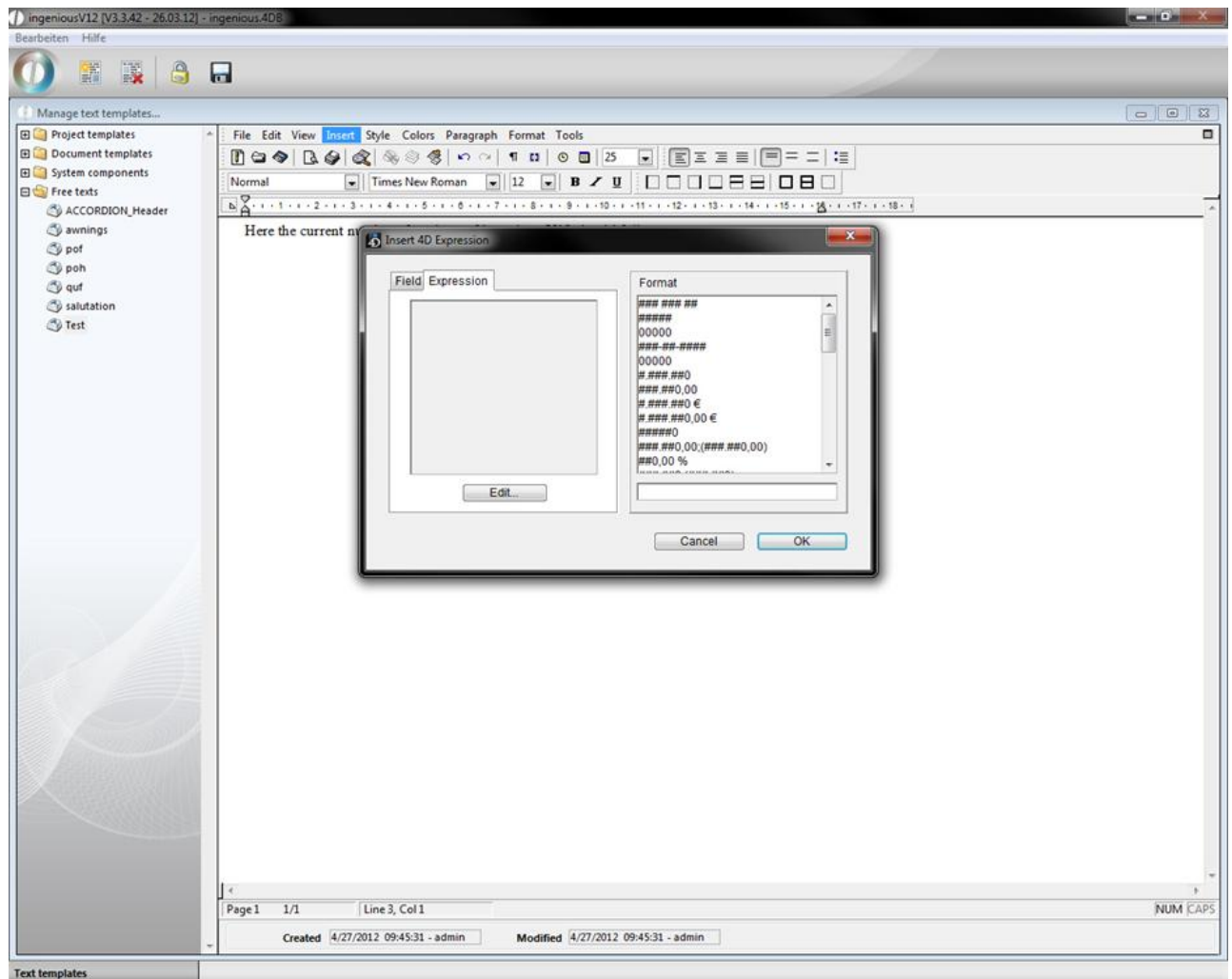


Option 1 as 4D expression

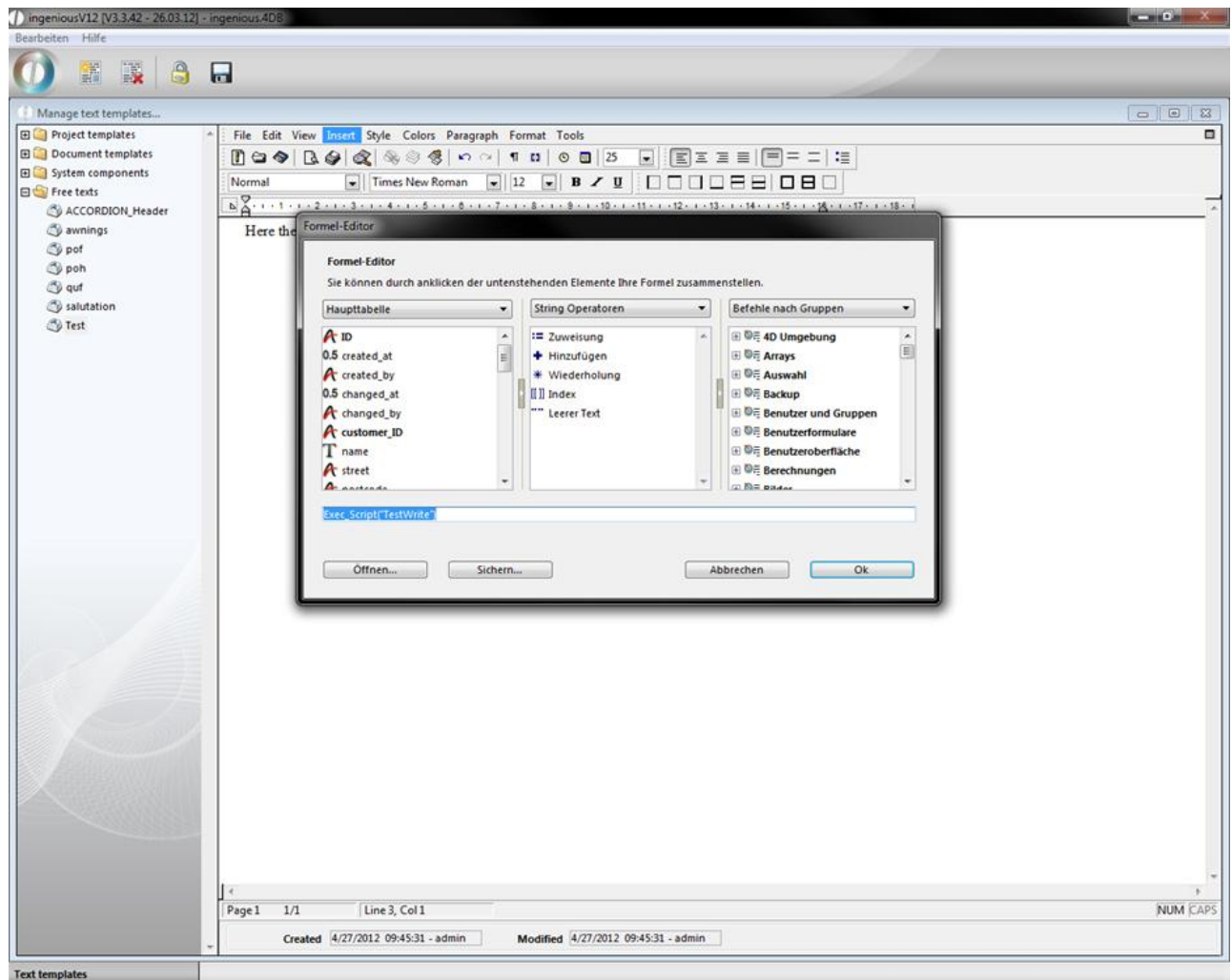
2. Switch to the template administration and create a new one in the category "free texts" named "Test".



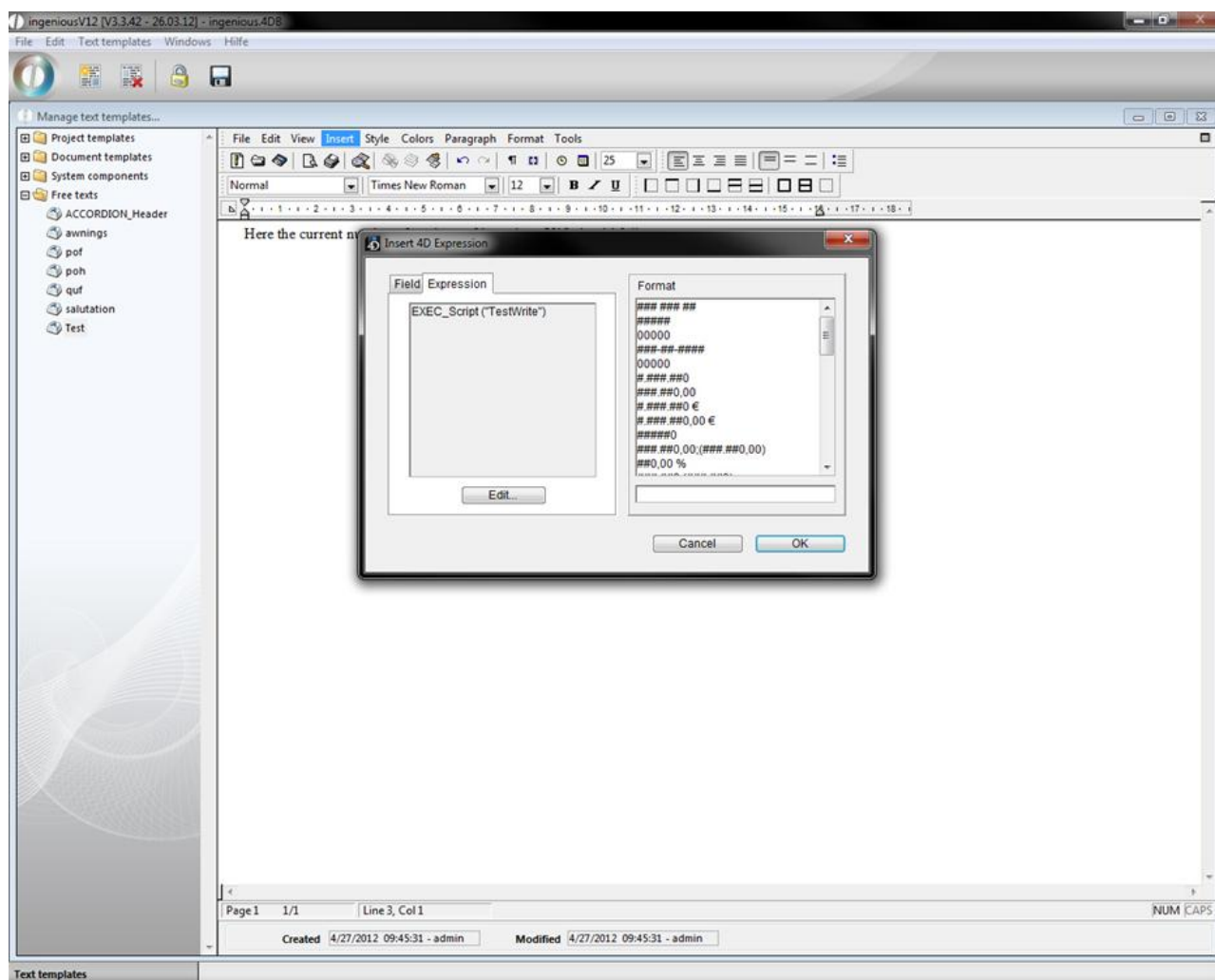
3. Select "4D Expression" in the menu "Insert". In the upcoming window go to "Expression" and click on "Edit..."

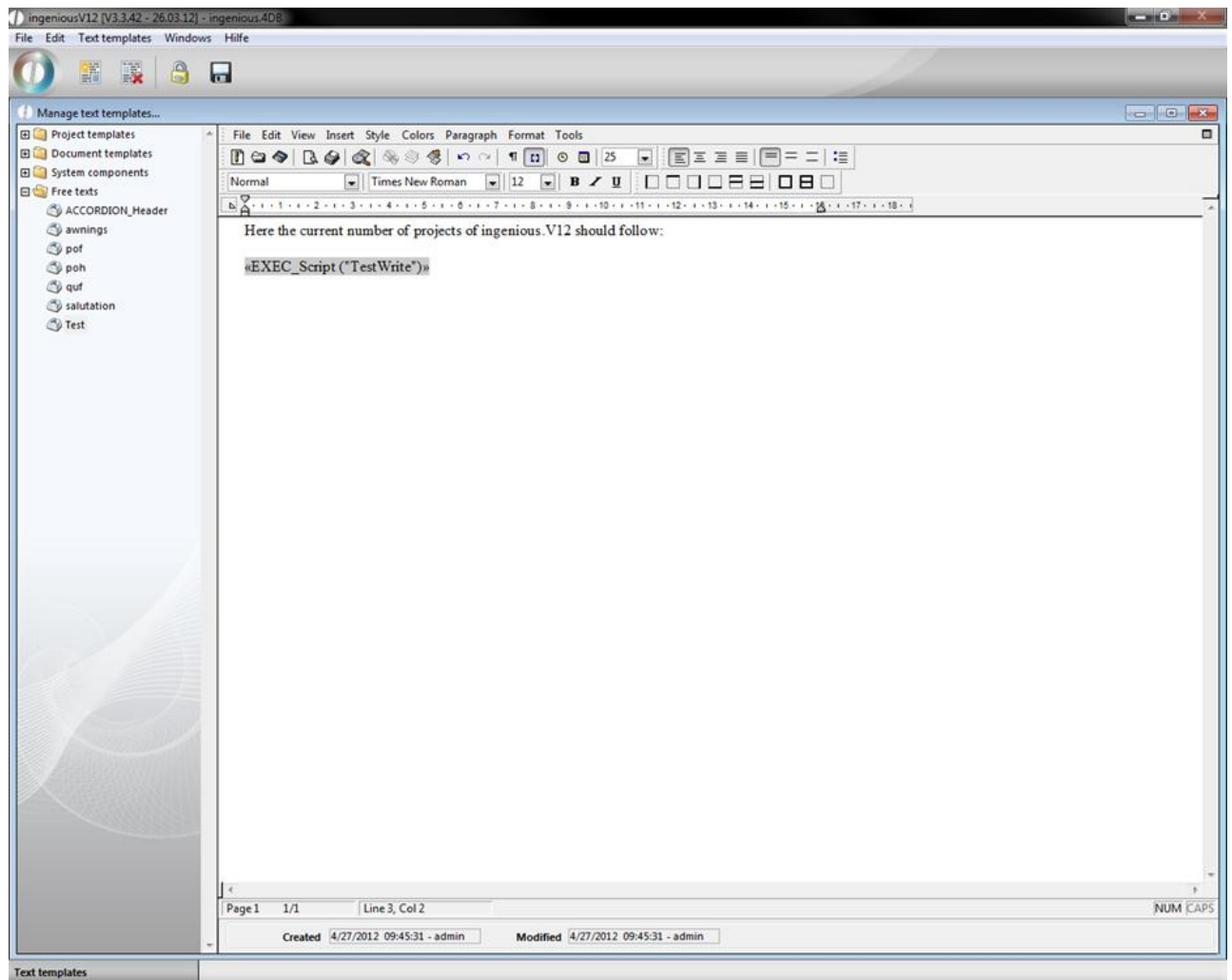


4. The formula editor will open up. Enter "Exec_Script("TestWrite")" in the input field and accept the changes by clicking "OK".

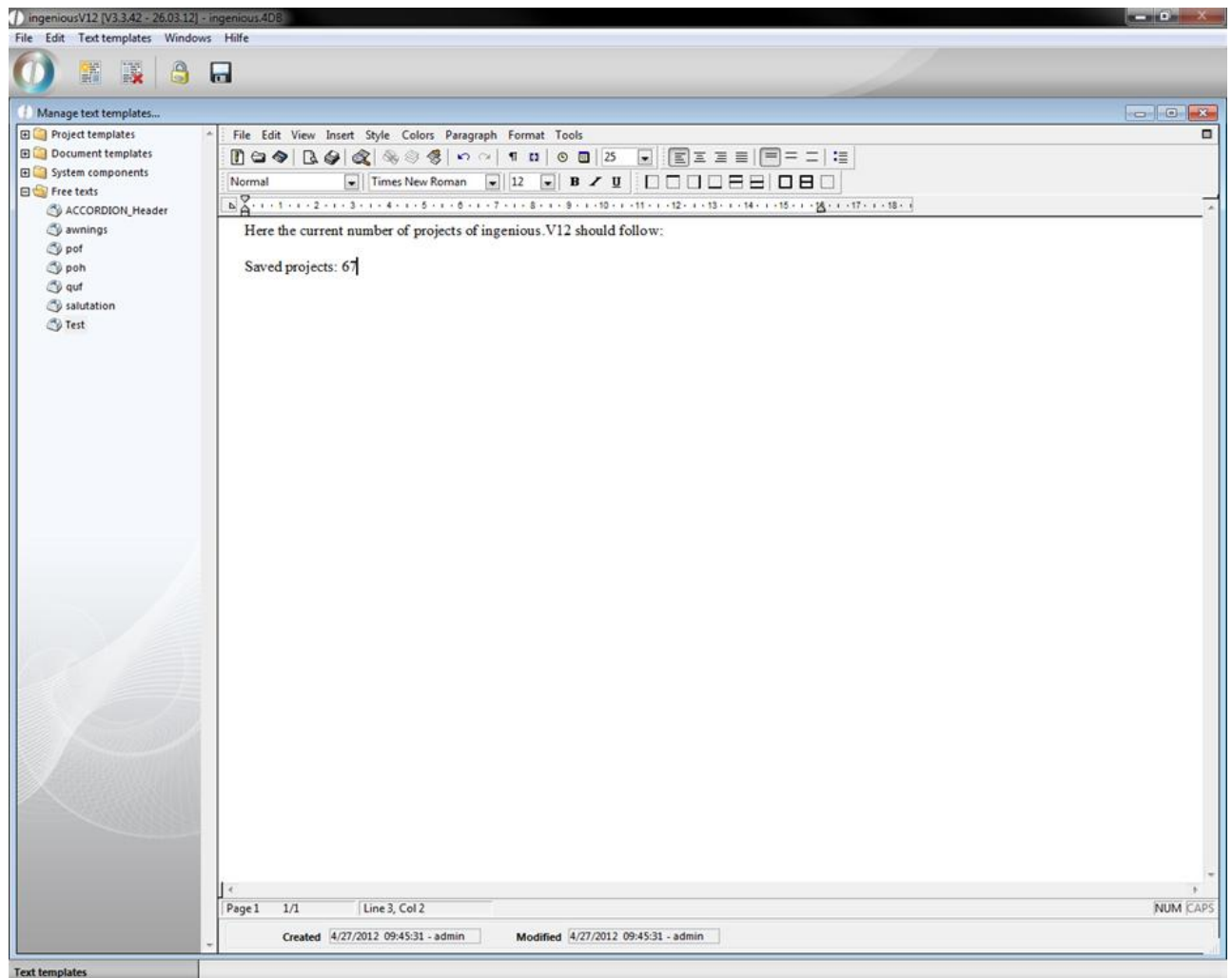


5. In the 4D Expression window the new created command is displayed. Click on "OK" to insert it to the text template.





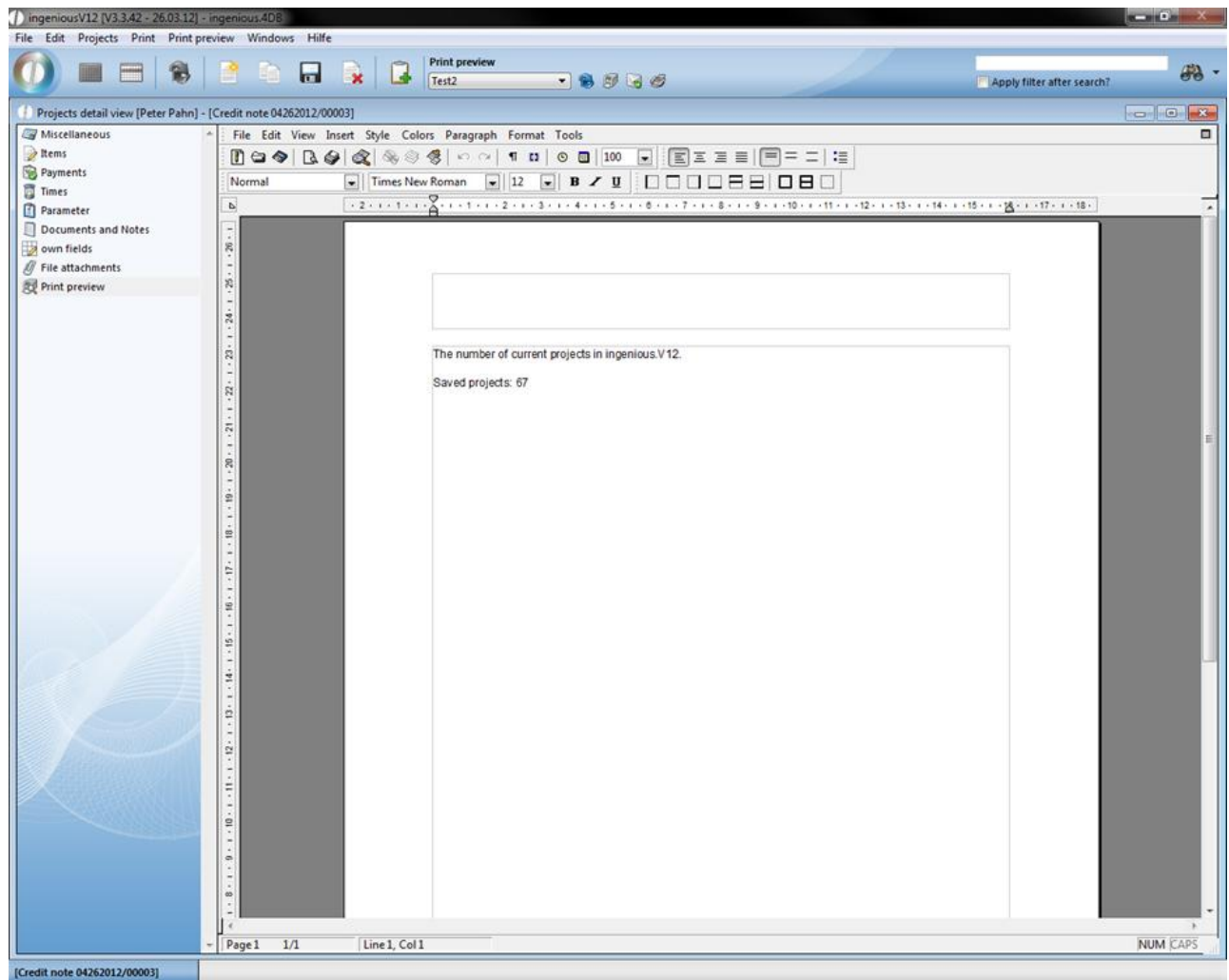
6. Now click on "References" in the menu "View" you toggle between the raw reference view and the executed view.



Option 2 as place holder

1. Create a new template "Test2" in the category "project templates" in the template administration.
2. Enter the placeholder "{Exec_Script("TestWrite")}"

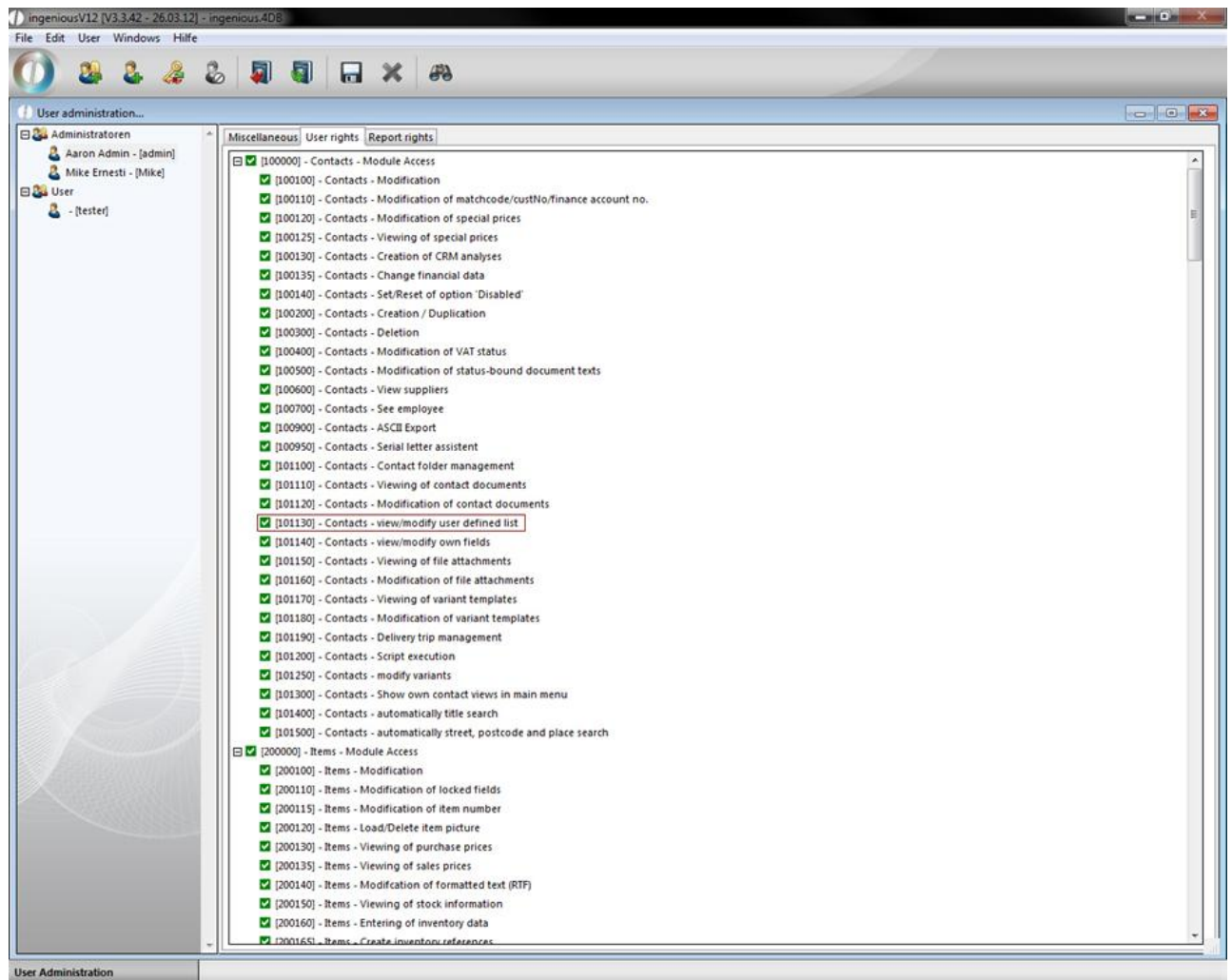
In the print preview of the project template the place holder will be solved.



User defined lists

User defined lists (sidebars) are flexible customizable widgets, that support a faster input of several field in the detail view of a module. These lists are possible in the contact and item module and the workflow modules.

Attention: To be able to use the user defined lists in the contact module, the corresponding user rights have to be enabled. For the other modules you don't need a specific user right.



Just create in the category "automatic procedures" in the free data manipulation module a script and assign it to the desired module. If you need any help with the creation of a script, an employee of the Ingenious GmbH will be happy to help you.

The following parameters/values are possible:

Parameter	Werte	Anmerkungen
LINES	Integer Ex. "10"	The number of output lines in the table. Initialize the table and has to be execute before all other commands. "Line" can be empty/is not necessary.
_WIDTH	Integer Ex. "300"	Pixel width of the table. Default value is 300. "Line" can be empty/is not necessary.
_SPLIT	Number1; Number2 Ex. "15;20"	Aufteilung der Spalten im Verhältnis von Zahl1 zu Zahl2 Segmentation of the columns according to the ratio number1 to number2. "Line" can be empty/is not necessary.
NAME	Text	Name of the current line (left column)

	Ex. "Firma/Name"	
FORECOLOR	Color oder RGB (Number1,Number2,Number3) Ex. "RGB(120,220,170)"	Color of the text in the left column (name). Available colors: red, green, blue, white, black, yellow or RGB-values.
BACKCOLOR	Color oder RGB (Number1,Number2,Number3) Ex. "red"	Color of the background color in the left column (name). Available colors: red, green, blue, white, black, yellow or RGB-values.
BIND	Field in the database Ex. "[Kontakte]Name"	Displayed/changeable value (right column) In the first version of the userlist only the table [Kontakte] can be used. The assignment to a generic table with any free definable fields is designated. If no bind is stated, an assigned script will be executed on loading the table and the return value will be displayed.
CONTROL	Default selection Ex. "Date"	The following values for the input type are available: Combobox (only 4D 2003, in 2004 like dropdown) DropDown; The available entrys are given in VALUELIST (see part VALUELIST) Button = Button that can execute several actions (see part ACTION) Boolean = Check Box Text = simple text field; multiline possible (see part ROWCOUNT) Integer Float Date Time ReadOnly = only output, no input possibilities If an invalid value is entered, the line will be automatically formatted correct when leaving or accepting the line.
ROWCOUNT	Integer Ex. "3"	Defines the height of the line. For text fields a multiline input is possible.
ACTION	Default selection Ex. "Script"	The following values are available: Script = executes a script. The script name has to be delivered as a parameter in the VALUELIST. Selectionlist = opens a Pop Up window with a selection list. The values of the selection list are given in the VALUELIST. Multiselection = opens a Pop Up window with a multi selection list. The values for the multi selection list and the separator have to be given in the VALUELIST.

		<p>The action „script“ can be used for most of the line types (text, date, time, etc.). Scripts assigned to a button are executed when the button is clicked or by pressing return. Scripts assigned to readonly fields will be executed on pressing return and on creation of the table. For all other fields the scripts are executed after the data has changed.</p> <p>The script variable Param1 contains the current user input. If this value should be modified, the script variable Result has to be filled with the desired return value.</p> <p>The actions „selectionlist“ and „multiselection“ can only be assigned to a button.</p>
VALUelist	Script name or value list	<p>Contains the script name for the action „script“ or a list of values for combo boxes, drop down menus, selection lists or multi selection lists.</p> <p>As separator for the particular values of the value list a line break (char 13), semicolon or comma is possible. For the action „multiselection“ a 4. Parameter for the separator in the linked field can be given to the API function UserList.</p>

The definition of the table is done with the API interface **UserList("Line";"parameter";"value")**

Example:

In the conversion from the simple to the extended entry mask in the program settings the input field "Name / Company" is dismissed and the input fields Name/Forename/Company/Company2... are visible. To display the old name field in existing contacts the following script has to be executed when opening the contacts module.

If ([Kontakte]Name#"") & ([Kontakte]Nachname="") & ([Kontakte]Vorname="") & ([Kontakte]Firma1="") & ([Kontakte]Firma2="") & ([Kontakte]Titel="")

UserList ("";"LINES";"1")

UserList ("";"_WIDTH";"500")

UserList ("";"_SPLIT";"15;35")

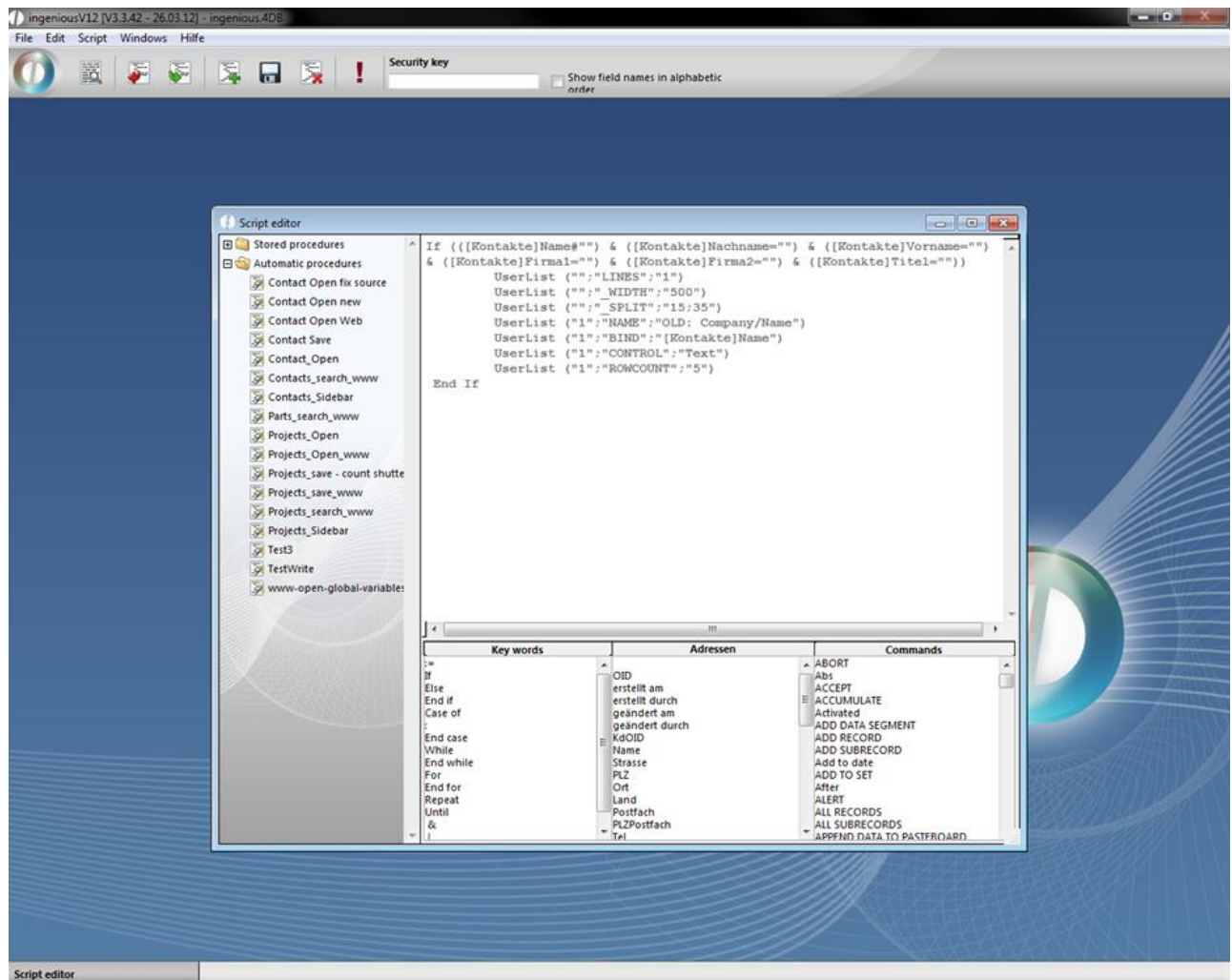
UserList ("1";" NAME";"OLD: Company/Name")

UserList ("1";"BIND";"[Kontakte]Name")

UserList ("1";"CONTROL";"Text")

UserList ("1";"ROWCOUNT";"5")

End If



Old contacts will be displayed like this:

The screenshot displays the 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious408' application window. The interface is divided into several sections:

- Left Sidebar:** A navigation pane with icons and labels for 'Contact data', 'Additional addresses / Trips', 'Financial data / Classification', 'Special prices', 'CRM information', 'Documents & Dates', 'Own fields', 'File attachments', 'Variant templates', 'Webservices', and 'Show projects'.
- Main Content Area:**
 - Miscellaneous:** Contains fields for 'Matchcode' (Mrs Sunshine), 'Customer number' (5528), 'Contacttyp', 'Name', 'Forename', 'Title1', 'Company', 'Company2', 'Title2', 'Street' (5566 Sunshine Avenue), 'Country' (US), 'State' (IL), 'ZIP' (12345), 'City' (Chicago), 'District', 'State', 'ZIP', 'P.O. Box', 'Birthday' (03/15/82), 'Contact person', and 'Salutation' (Dear Mrs. Sunshine).
 - Communication:** Includes fields for 'Phone', 'Fax', 'Email', and 'WWW'.
 - Notes:** A large text area with a 'PinUp note' icon and a 'Show notes in project' checkbox.
- Right Panel:** A 'User defined List' table with columns 'Name' and 'Value'. It contains one entry: 'OLD: Company/Name' with the value 'Mrs. Sunshine'.
- Footer:** Shows 'Created 4/25/2007 14:46:31 - cjaeger' and 'Modified 4/26/2012 13:33:07 - admin'.

Individual methods and forms

With the individual scripts own forms and functions can be programmed.

Example code for forms:

Generic selection

```

ARRAY TEXT(aObjectType;12)
ARRAY TEXT(aObjectValue;12)
ARRAY LONGINT(aObjectPos;12;4)
ARRAY TEXT(aResults;0)
aObjectType{1}:="Groupbox"
aObjectValue{1}:="new entry form"
aObjectPos{1}{1}:=5 // left
aObjectPos{1}{2}:=3 // top
aObjectPos{1}{3}:=435 // right
aObjectPos{1}{4}:=100 // bottom
aObjectType{2}:="Label"
aObjectValue{2}:="Entry 1 Text / Check:"
aObjectPos{2}{1}:=15
aObjectPos{2}{2}:=25

```

```
aObjectPos{2}{3}:=140
aObjectPos{2}{4}:=40
aObjectType{3}:="Label"
aObjectValue{3}:="Entry 2 Dropdown:"
aObjectPos{3}{1}:=15
aObjectPos{3}{2}:=50
aObjectPos{3}{3}:=140
aObjectPos{3}{4}:=65
aObjectType{4}:="Label"
aObjectValue{4}:="Entry 3 Date / Icon:"
aObjectPos{4}{1}:=15
aObjectPos{4}{2}:=75
aObjectPos{4}{3}:=140
aObjectPos{4}{4}:=90

aObjectType{5}:="Text" // Text
aObjectValue{5}:="9:20"
aObjectPos{5}{1}:=150
aObjectPos{5}{2}:=25
aObjectPos{5}{3}:=285
aObjectPos{5}{4}:=40
aObjectType{6}:="Dropdown"
aObjectValue{6}:="Value2;Value1;Value2;Value3"
aObjectPos{6}{1}:=150
aObjectPos{6}{2}:=48
aObjectPos{6}{3}:=285
aObjectPos{6}{4}:=66
aObjectType{7}:="Date"
aObjectValue{7}:="1.1.2013"
aObjectPos{7}{1}:=150
aObjectPos{7}{2}:=75
aObjectPos{7}{3}:=240
aObjectPos{7}{4}:=90

aObjectType{8}:="Checkbox"
aObjectValue{8}:="True"
aObjectPos{8}{1}:=300
aObjectPos{8}{2}:=25
aObjectPos{8}{3}:=425
aObjectPos{8}{4}:=40
aObjectType{9}:="Combobox"
aObjectValue{9}:="Value99;Value4;Value5;Value6"
aObjectPos{9}{1}:=300
aObjectPos{9}{2}:=48
aObjectPos{9}{3}:=425
aObjectPos{9}{4}:=66
aObjectType{10}:="Icon"
aObjectValue{10}:="25885"
aObjectPos{10}{1}:=300
aObjectPos{10}{2}:=70
aObjectPos{10}{3}:=324
aObjectPos{10}{4}:=94

aObjectType{11}:="OK"
```

```

aObjectValue{11}:="OK"
aObjectPos{11}{1}:=335
aObjectPos{11}{2}:=105
aObjectPos{11}{3}:=435
aObjectPos{11}{4}:=127
aObjectType{12}:="Abort"
aObjectValue{12}:="Cancel"
aObjectPos{12}{1}:=225
aObjectPos{12}{2}:=105
aObjectPos{12}{3}:=325
aObjectPos{12}{4}:=127
Generic_Selection (440;133;->aObjectType;->aObjectValue;->aObjectPos;->aResults)
If (OK=1)
My_Alert (aResults{6})
End if

```

Example codes for alerts and requests

To show a message box:

```

My_ALERT ("Test")
My_ALERT2 ("Test1";"Test2";"Test3")

```

Confirmation request

```

My_CONFIRM ("Please confirm")
If (OK=1)
My_ALERT ("confirmed")
End if

```

Value request

```

vText:=My_REQUEST ("Please insert value")
If (OK=1)
My_ALERT (vText)
End if

```

Choice request

```

vNum:=My_Choice ("Alternative 1";"Alternative 2")
Case of
: (OK=0)
// Cancel
: (vNum=1)
My_ALERT ("You have chosen Alternativ 1")
: (vNum=0)
My_ALERT ("You have chosen Alternative 2")
End case

```

Selection list

```

ARRAY TEXT (cbodynamiccbo;3)
cbodynamiccbo{1}:="Value 1"
cbodynamiccbo{2}:="Value 2"
cbodynamiccbo{3}:="Value 3"
cbodynamiccbo:=2
vText:=My_CBO ("Please choose")
If (OK=1)

```

```
My_ALERT (vText)
End if
```

Example codes for date selection:

With default date set to current date

```
cwSelectDate:=Current date(*)
CW_SetPrefs
CW_SetDate (cwSelectDate)
CW_OpenDialog
If (OK=1)
My_ALERT ("Date is "+String(cwSelectDate))
End if
```

With default date set to first of current month

```
cwSelectDate:=date("01."+string(month of (current date(*)))+"."+string(year of (current
date(*))))
CW_SetPrefs
CW_SetDate (cwSelectDate)
CW_OpenDialog
If (OK=1)
My_ALERT ("date is "+String(cwSelectDate))
End if
```

Default date is always current date

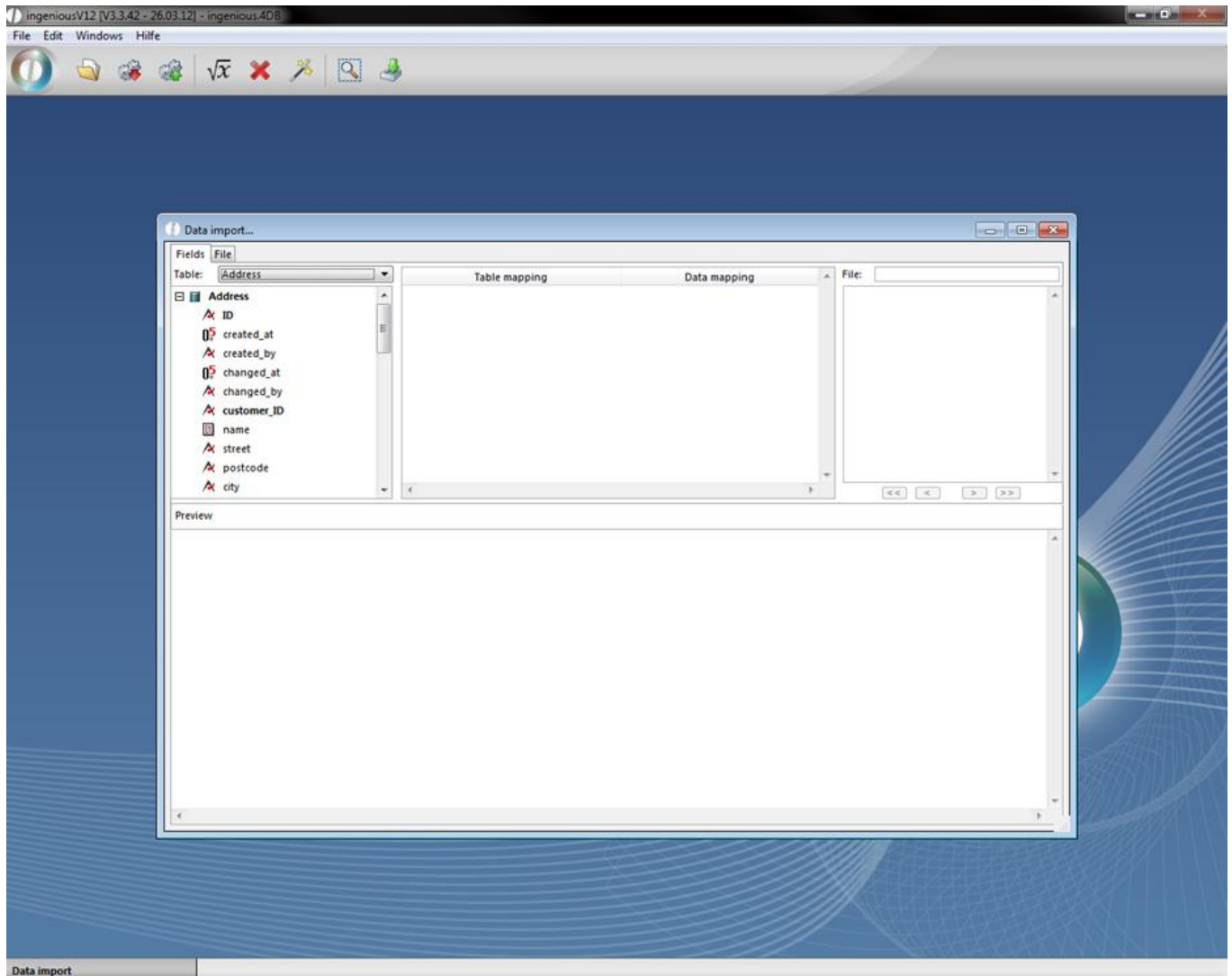
```
CW_SetPrefs
CW_SetDate
CW_OpenDialog
If (OK=1)
My_ALERT ("date is "+String(cwSelectDate))
End if
```

A complete overview of internal 4D commands can be found at:

<http://doc.4d.com/4Dv12/4D/12.4/4D-Language-Reference.100-976885.en.html>

6.4 Data import

In the data import, diverse files (XML, fixed text length, free text length) can be processed and imported. Settings for data import can be stored or downloaded. With the Data Import Manager, data from several data files can be inserted directly into the tables. Data files can include records as texts of fixed lengths (i.e. each record 200 characters long, the first 30 matchcodes before, the next 20 names, the next 50 addresses, etc.). Data files can have a data record per line and individual fields will be separated by specific symbols i.e. tab, semicolon, etc.



Open file for data import



Save settings



Download saved settings



Open macro editor



Delete link



Automatic assignment of the table field to data entries



Create import preview



Import data

Assignment of the table fields will be done using Drag & Drop or automatically. Files can be viewed or forwarded with arrows or double arrows. In addition, error corrections of erroneous data, or of already existing records can be made with the "File" register card. In the section "Data files", it can be determined what should happen if a data file already exists.

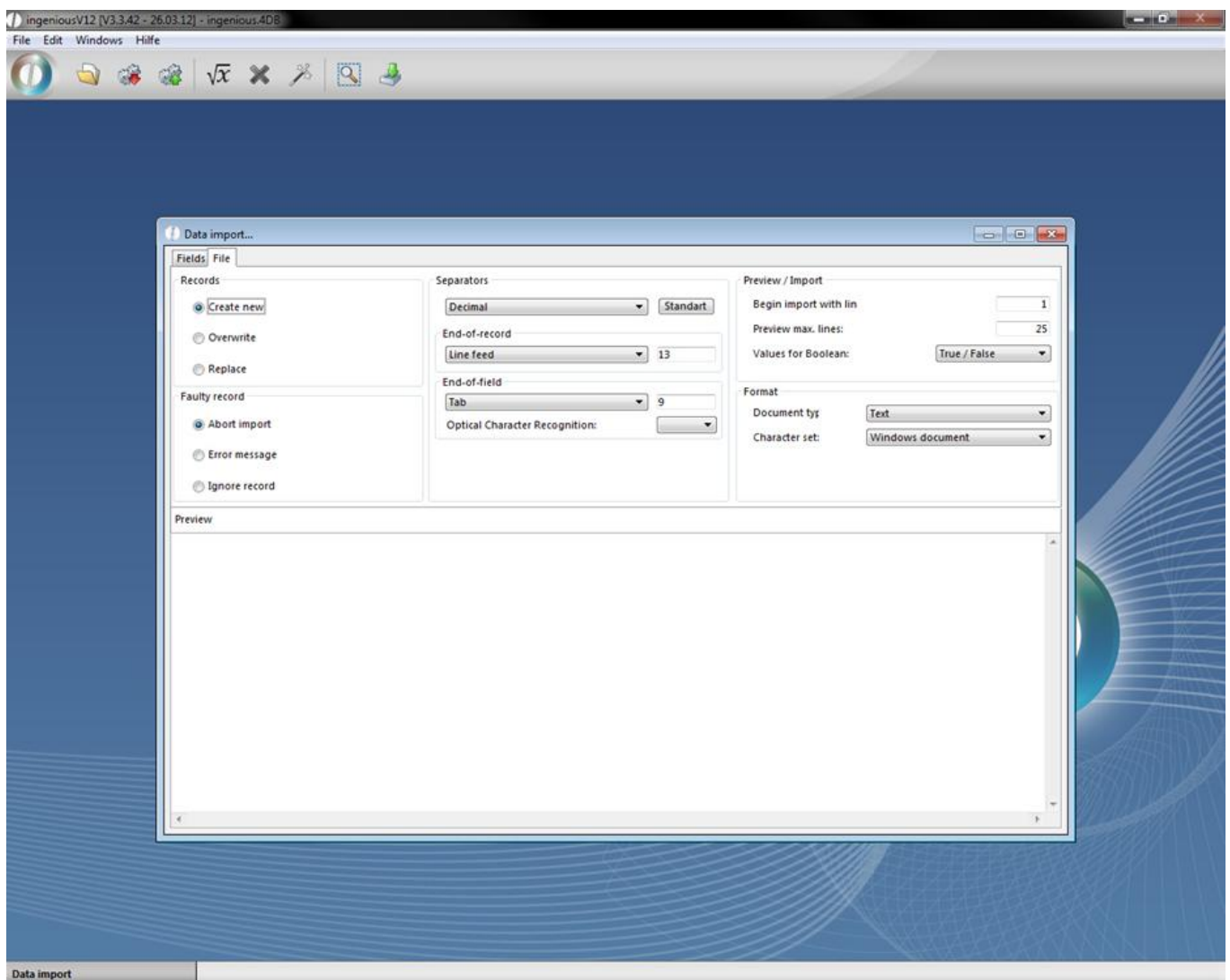
- Only new data files will be entered, if an entry already exist and no modification can be made
- Fields from the old data files are overwritten with the new ones. If there is no entry for a field, then this does not change
- The old data file is deleted and replaced with a new one

In the section "Corrupt file", one can show what should happen when there is an error (incorrect macro, duplicate matchcode, etc.):

In the section "Corrupt file"

- an error message regarding the type and place of the error and cancellation of the import
- whenever an error appears, give an error message, import and continue
- do not give an error message and continue the import

In the segment "Separators", the sentence length and separator can be set. In the segment "Format", settings for the file type and font can be made (important for showing ü, ö, ä, ß). Other settings are possible in the segment "Preview / import". If one more table header is saved in a file for instance, a 2 must be set in "Imports from the line". If one has to import many records, one can show how big the preview should be with "Preview max. lines".

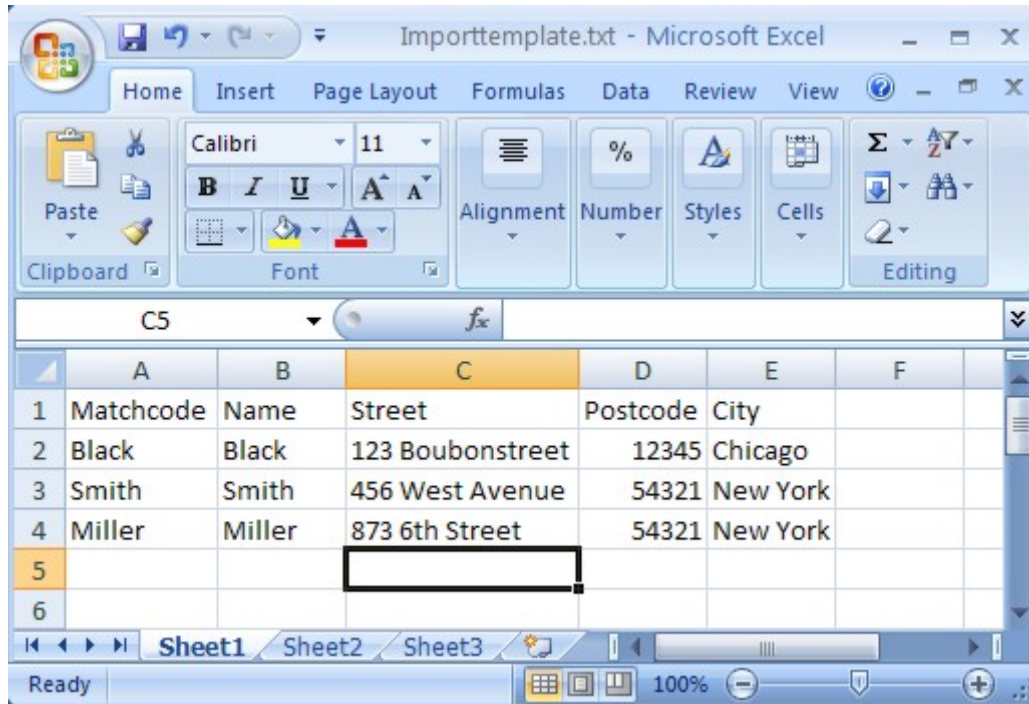


The file records can be edited by means of a macro editor before the import. For example, the zip code can be filtered

out from an address line or the order articles / sales articles are placed as "true". The macros can be stored separately as a file and be loaded.

Practice with data import

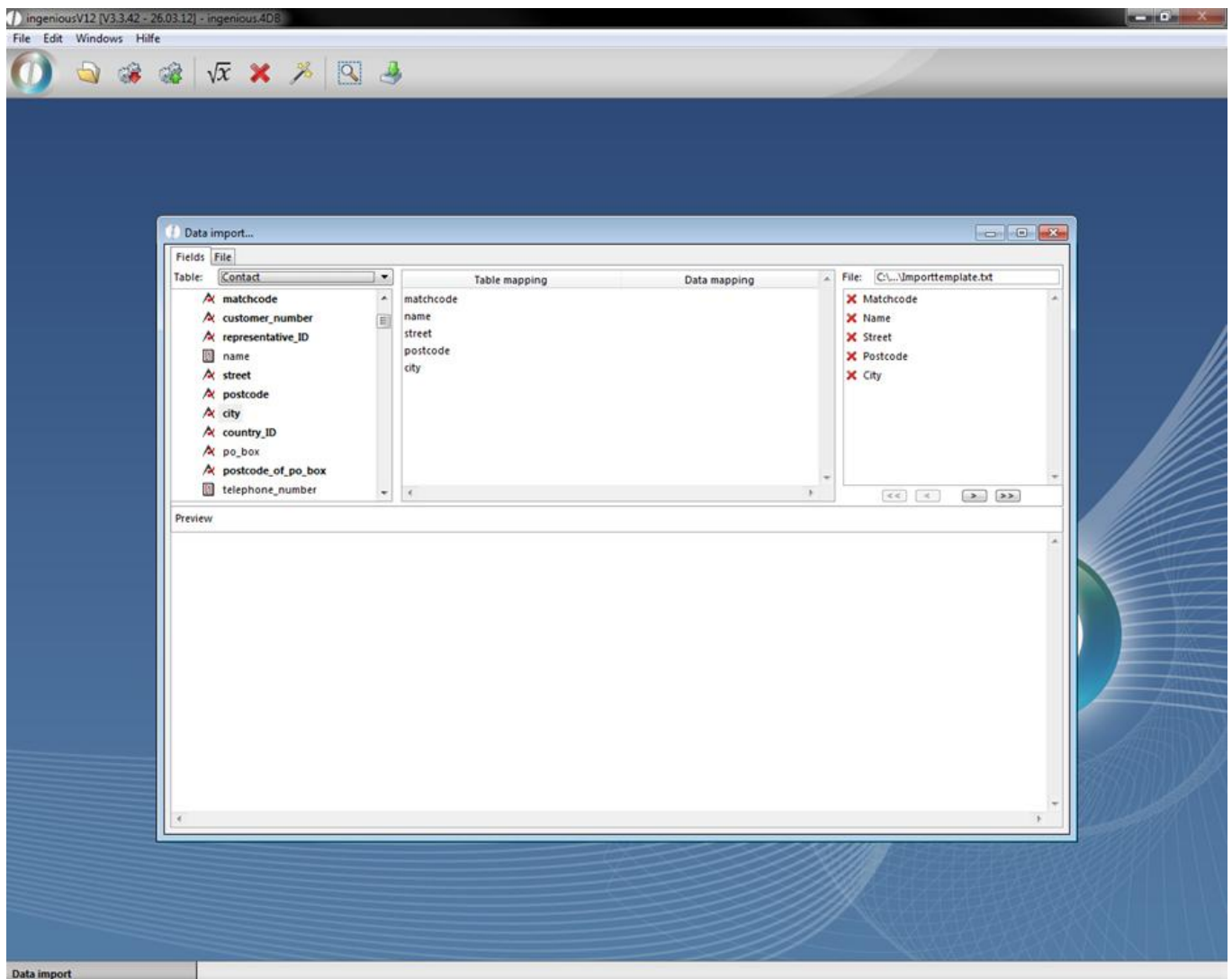
1. Apply an Excel file with the following values and save this as a text file on your desktop under the name "Importtemplate".



Importtemplate.txt - Microsoft Excel

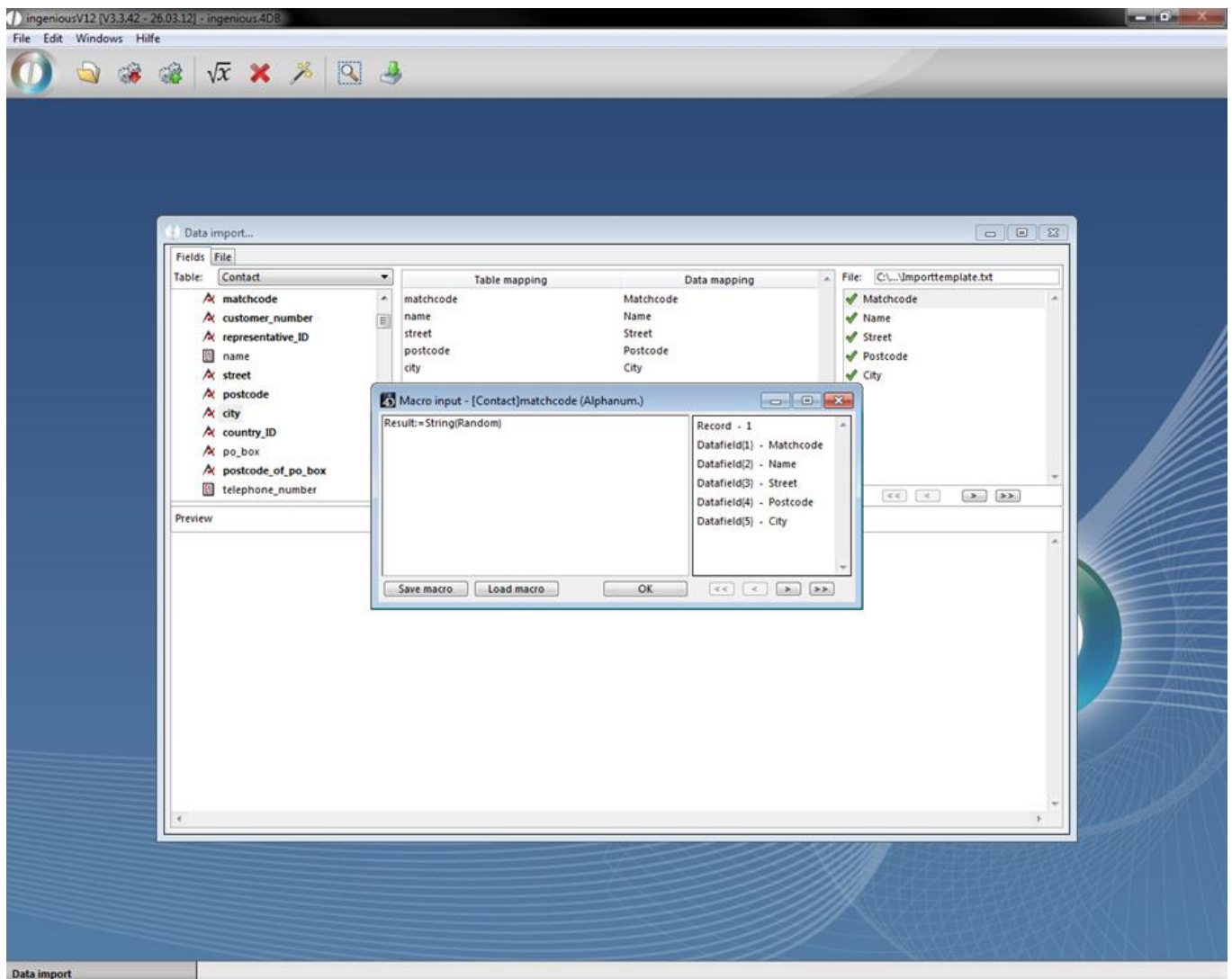
	A	B	C	D	E	F
1	Matchcode	Name	Street	Postcode	City	
2	Black	Black	123 Boubonstreet	12345	Chicago	
3	Smith	Smith	456 West Avenue	54321	New York	
4	Miller	Miller	873 6th Street	54321	New York	
5						
6						

2. Now open the data import and pull the table of contents with Drag & Drop, as illustrated, in the table allocation area. Then click on the button and choose the provided import template.

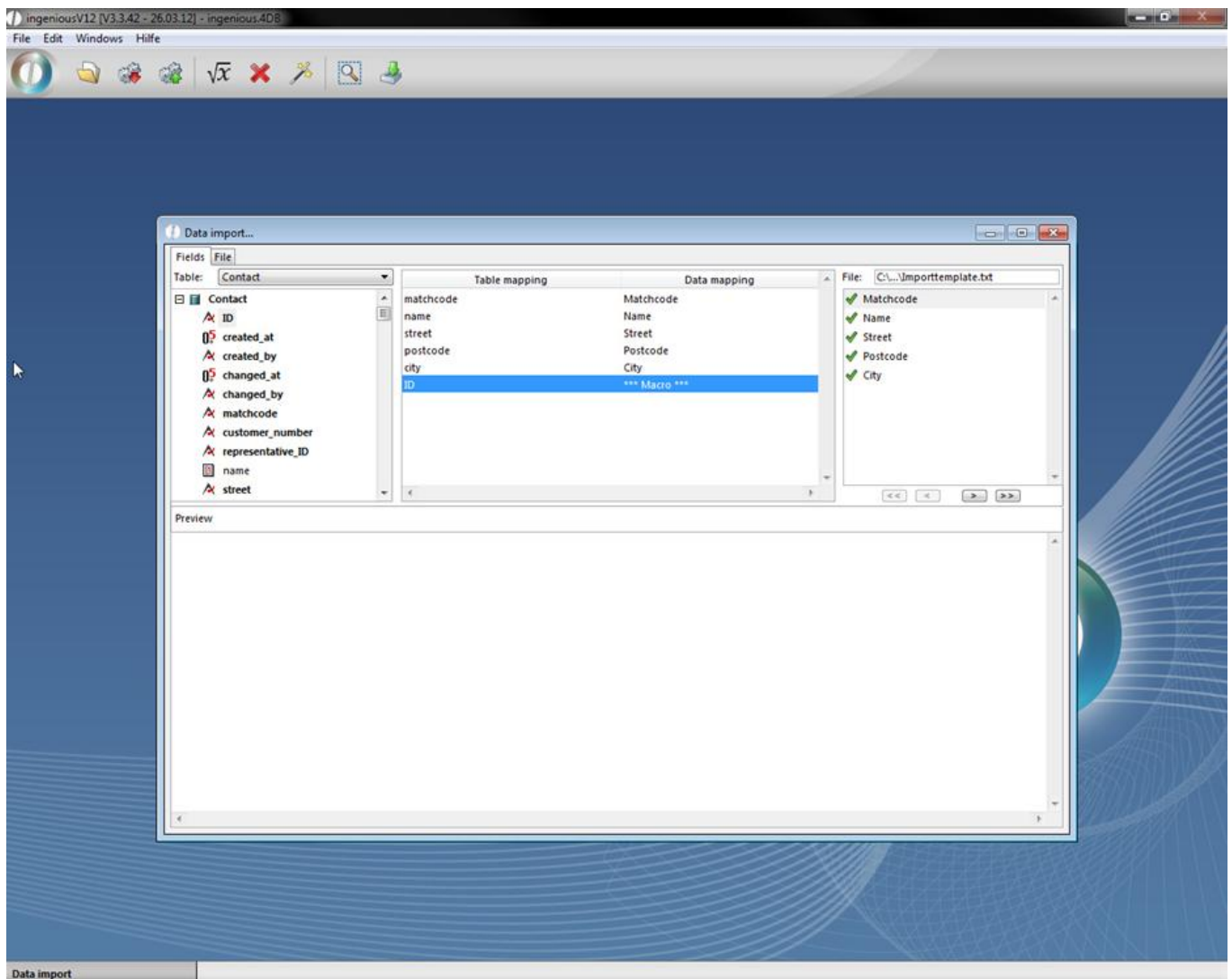


Using Drag & Drop, pull the file data in the corresponding order in the area "Data mapping", or click on the button for the automatic allocation of the data.

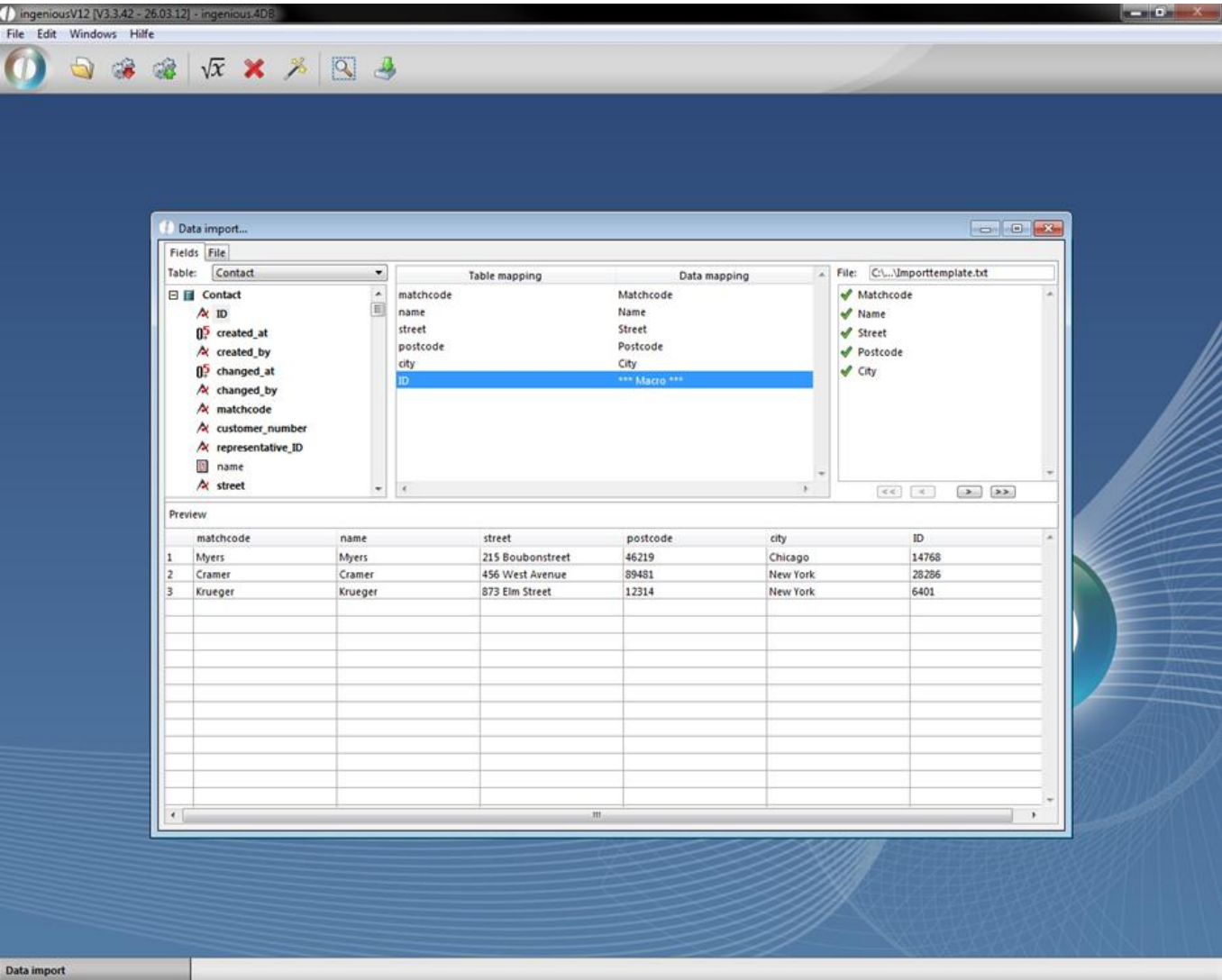
With the help of the macroeditor you can enter different macros for different types of calculations

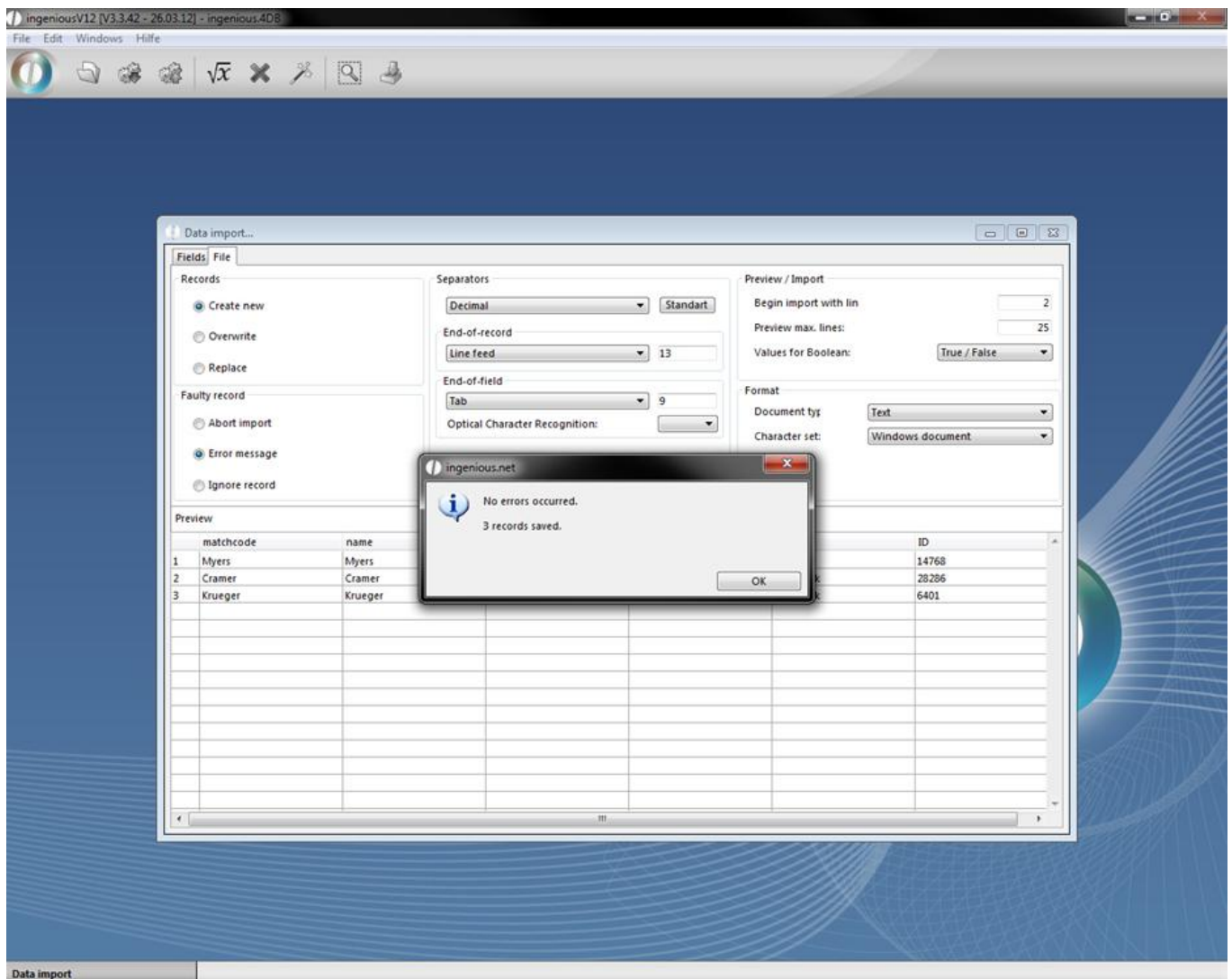


Example: Random assignment of the customer identification number



Now put the following settings in the "File" area and begin the import by clicking on the icon.



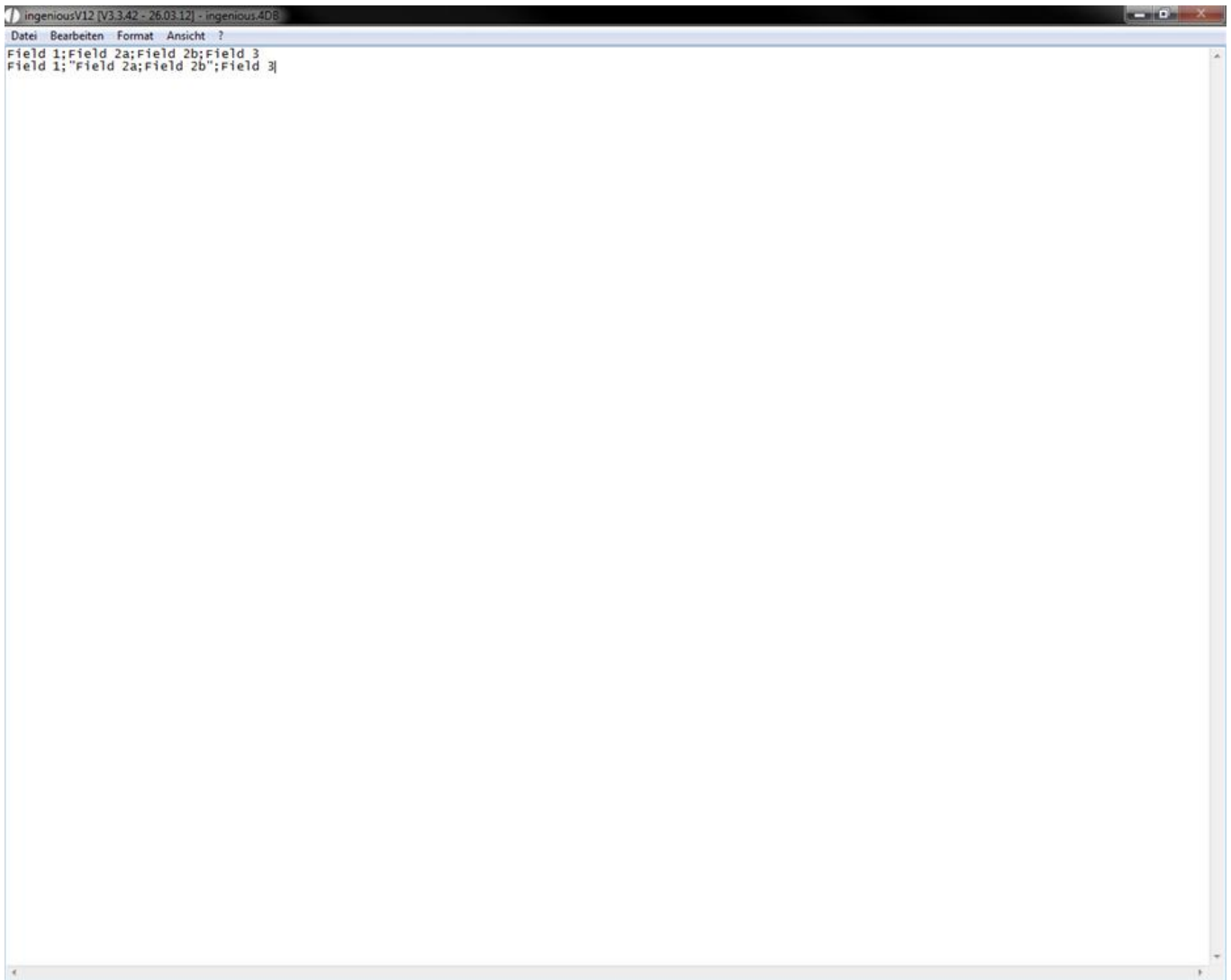




If the export was successful, you will see the newly added contacts in the contact list view.

Matchcode	CustNo.	Telephone	Company / Name	Street	Count	Zip	City	Fax
Myers			Myers	215 Boubonstreet	USA	46219	Chicago	
Cramer			Cramer	456 West Avenue	USA	89481	New York	
Krueger			Krueger	873 Elm Street	USA	12314	New York	

Practice for text recognition

1. With the help of the windows editor create the following file and save it

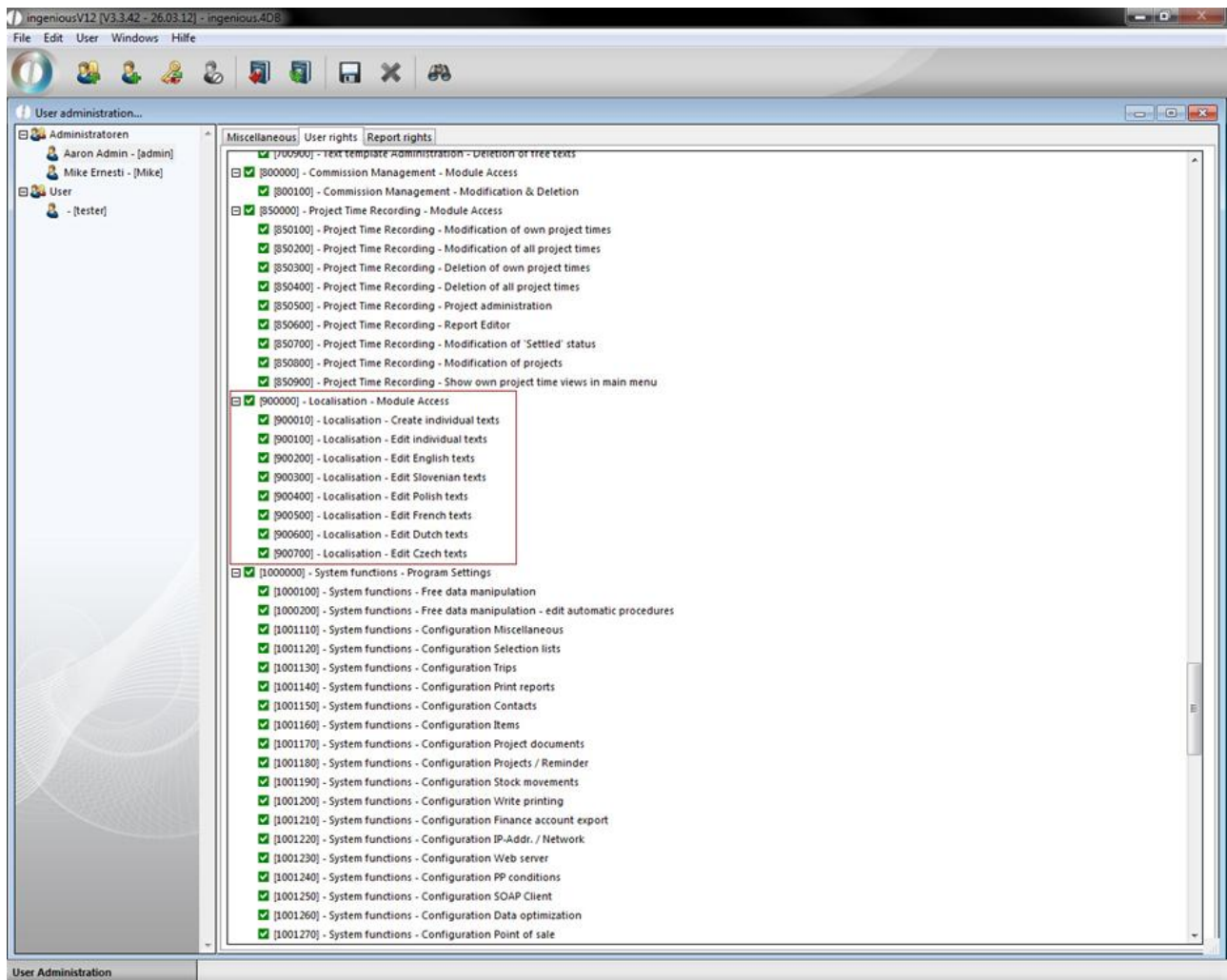


2. Open the data import and select the category "File". In the area "Separators" choose the option "Symbol", in the Field "End of field" the option "semicolon" and the quotes as optional character recognition. The semicolon is used as a indicator, that indicates the end of a data field.
3. Switch to the category "Fields" and click the button . Choose the created text field and open it.
4. Click on  to view the data field of the second line. Here only three field are created, because the semicolon was recognized as a text in between the two quotes.

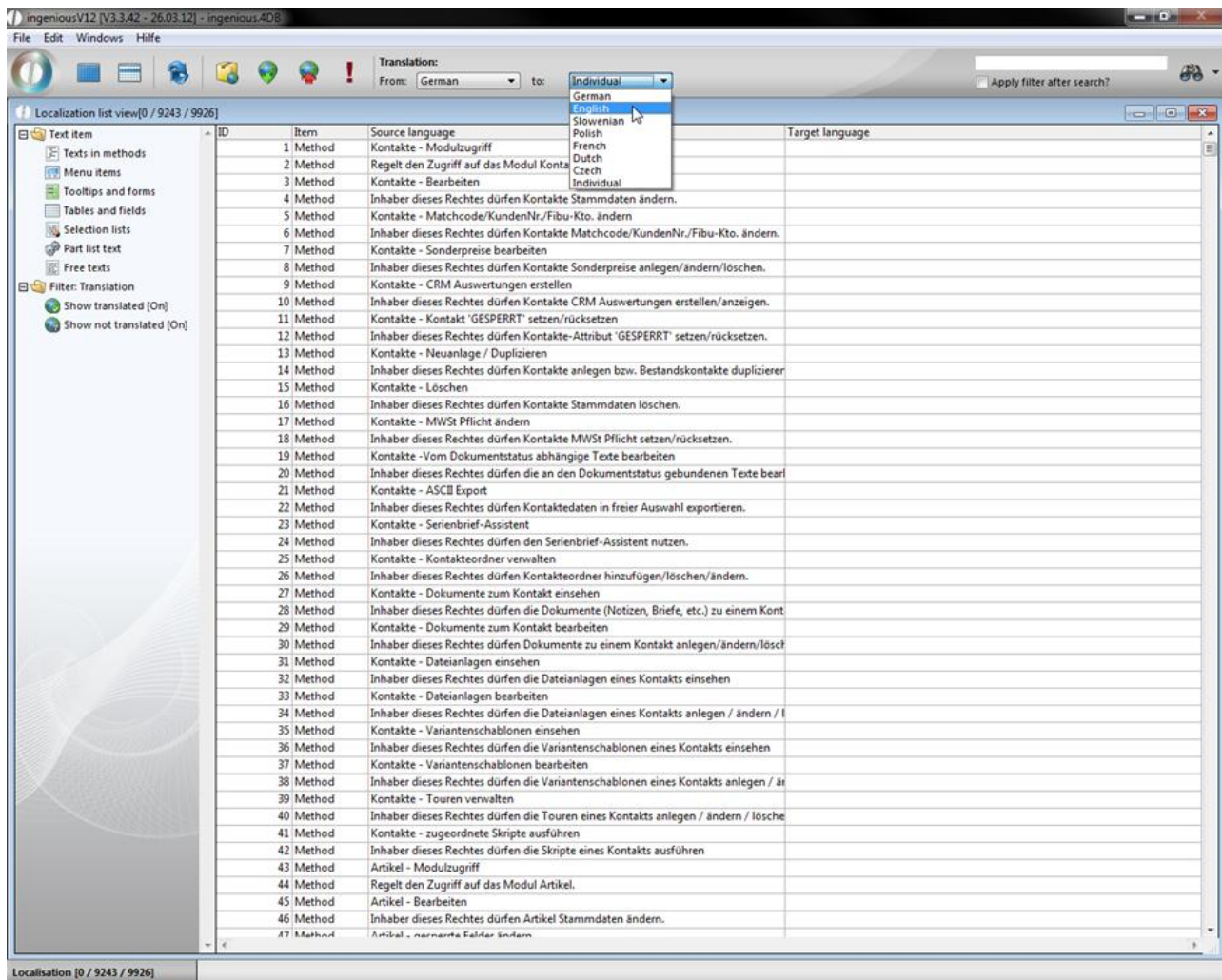
6.5 Localization

The localization manager is a comfortable tool for the translation of Ingenious.V12 into other languages. The translations can be done by a translator without the need for programming. With the localization manager, a special version of Ingenious.V12 for foreign branches or a partner edition for foreign clients can be created. In this manner, this management tool has an enormous impact for gaining new clients as well as for opening new markets.

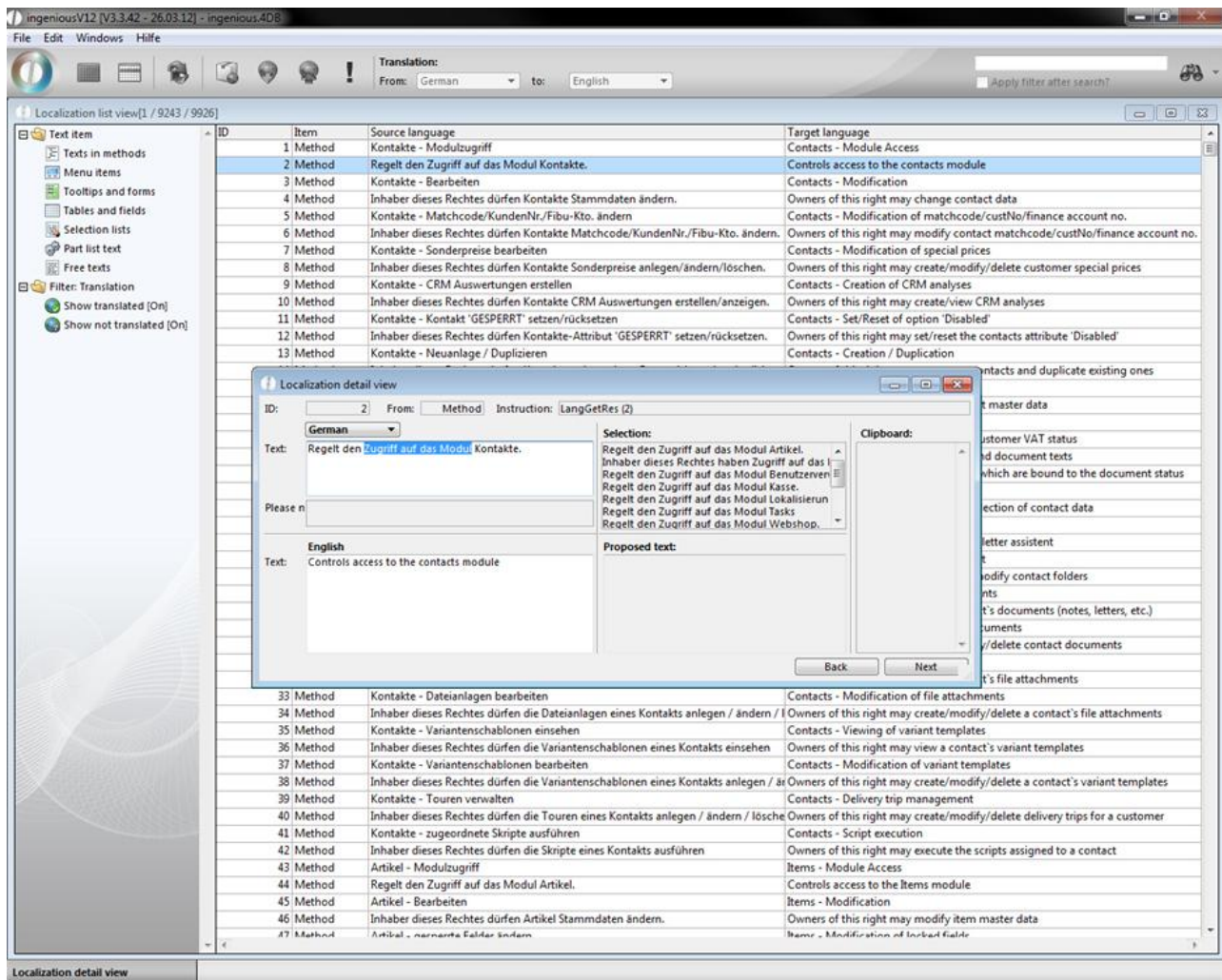
In order to start the localization program, the corresponding user rights have to be released in the user administration.



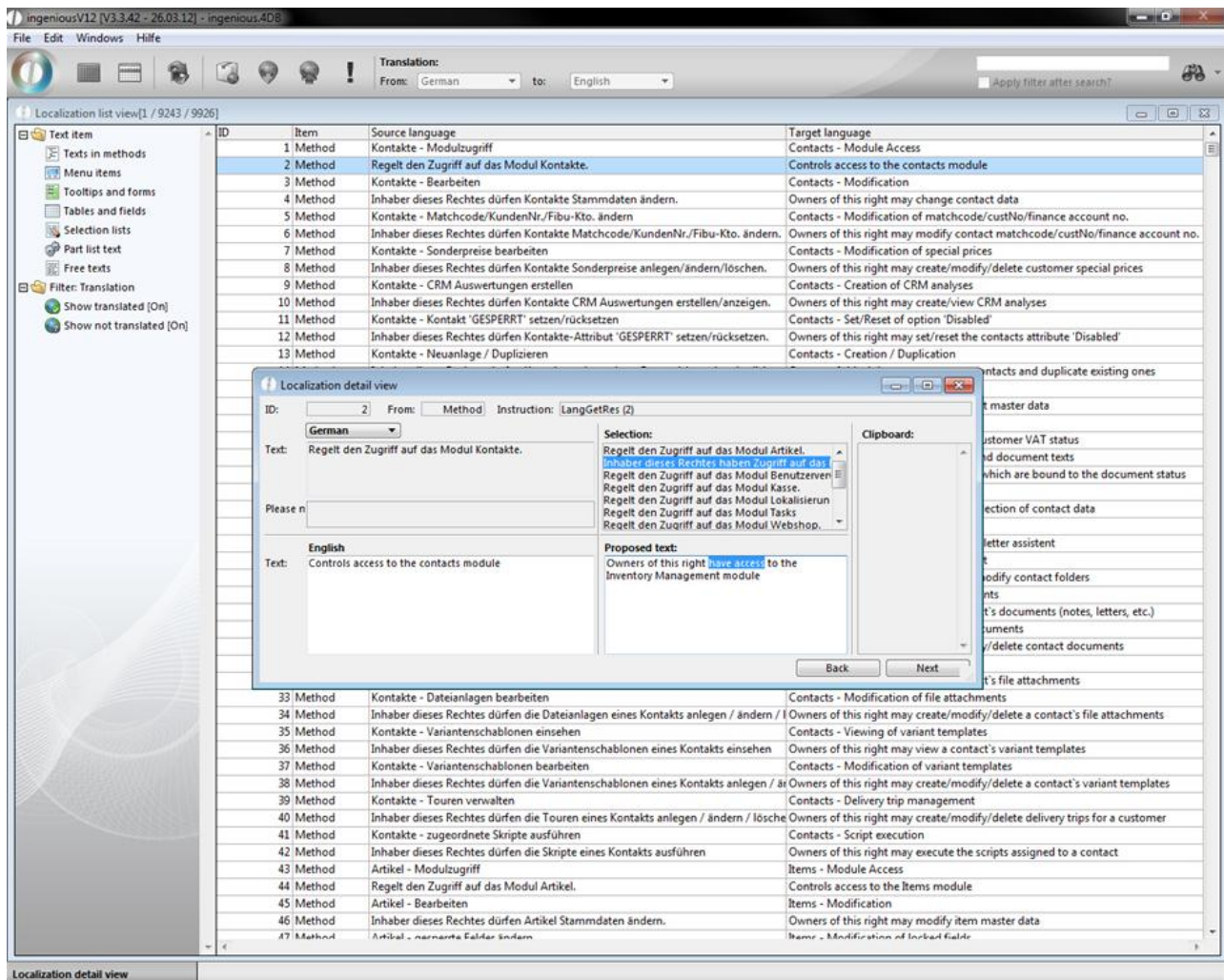
The source language of the translation can be selected. At this time, English, German and Slovenian texts are available. With the list in the left section area, you can determine which texts should be displayed. At the end of this chapter, we will refer to the application of the "Individual" language option in detail.



In order to translate a text, you have to double click on the text entry. A new window with the source text and an activated field for the target text (left column) appears. In order to speed up the translation, a list with similar translations can be displayed. For that, a paragraph must be selected and CTRL+H activated. All texts with translations are downloaded that contain the selected paragraph (middle column).



Frequently recurring words and word groups can be temporarily saved in the folder on the right side. For that, you select the desired text and press the F9 key.




In order to insert a word group of the file into the target text, select the folder, place the cursor on the desired place in the target text by double-clicking. The paragraph must be highlighted and saved by pressing F12. Entries in the folder can be deleted by right-clicking.

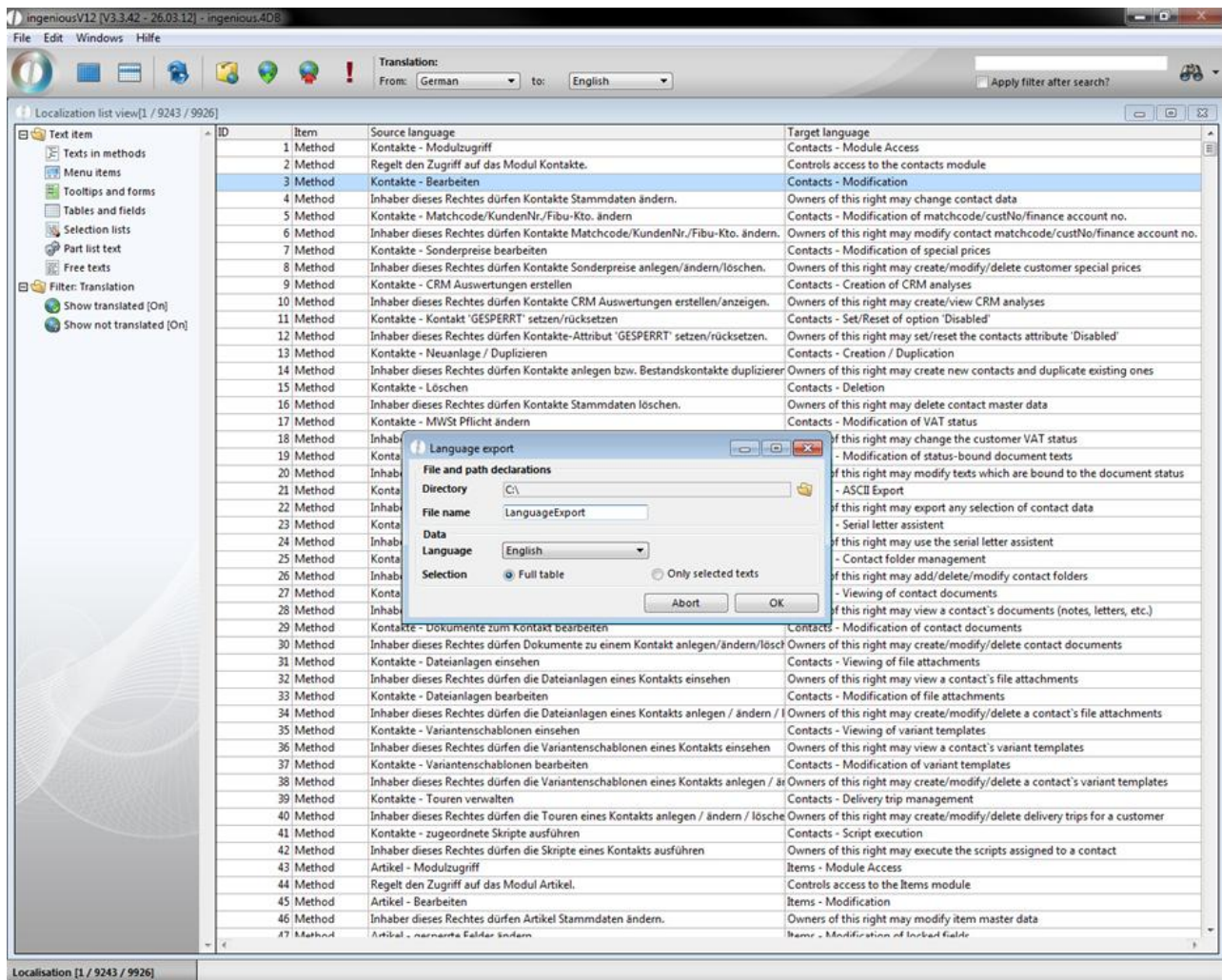
Between the single translation texts, one can further switch with Enter, picture 1, picture ↓ or the buttons can be forwarded. Within the texts, there is a placeholder where no translated is need. These placeholders are:


(%Cur) is replaced with € / \$ / ...

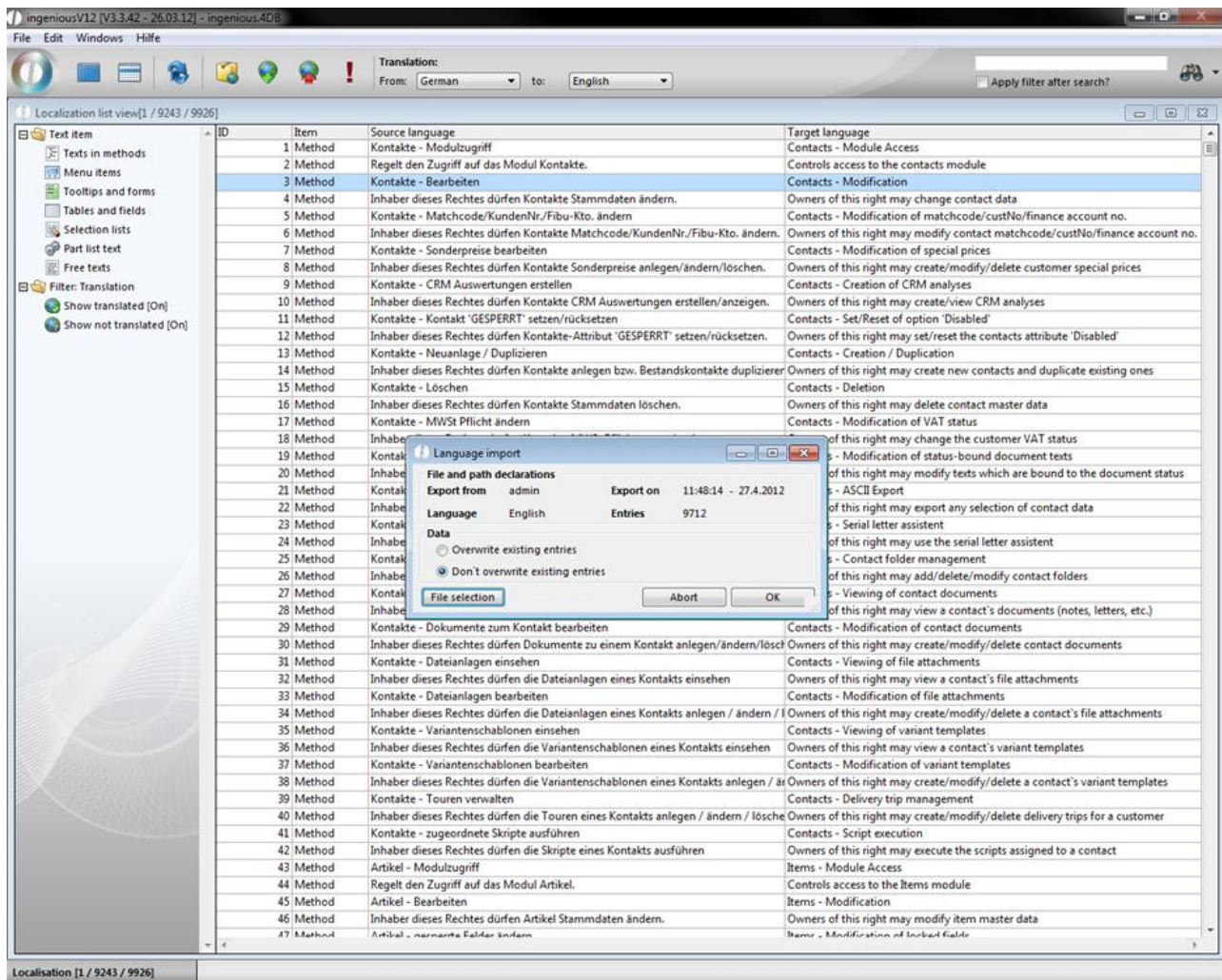
(%CurISO) is replaced with EUR / USD / SIT / ...

(%1), (%2), ... is dynamically replaced with each suitable printout (Variables)

If all desired texts were entered, data can be saved in the list view and sent with the  export icon. In the opening window, the target directory, file name and data to be transferred, will be selected for language export.



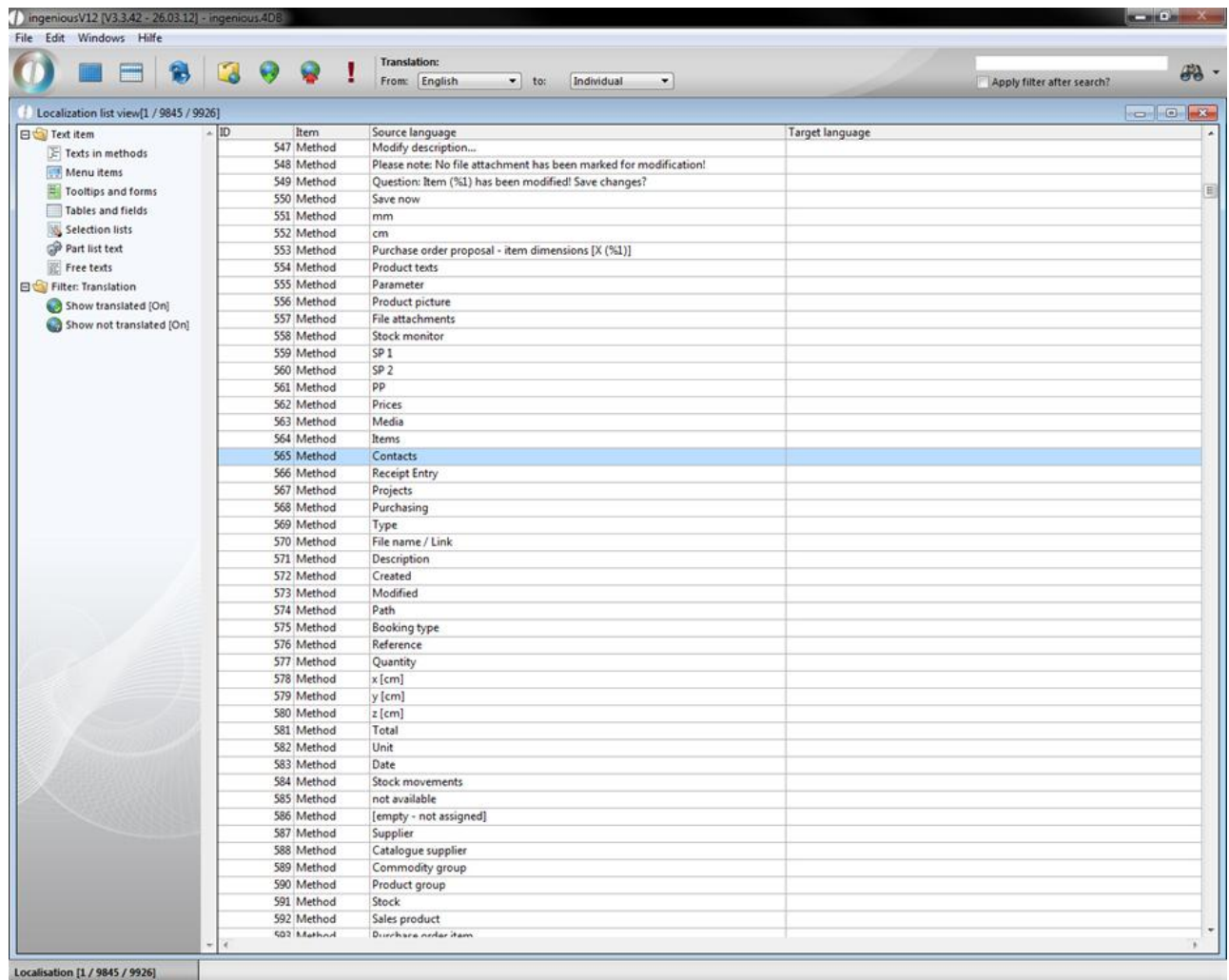
To import new texts, click on the import icon . In the opening language import window, you will select the desired import file and determine whether existing data should be kept or overwritten.



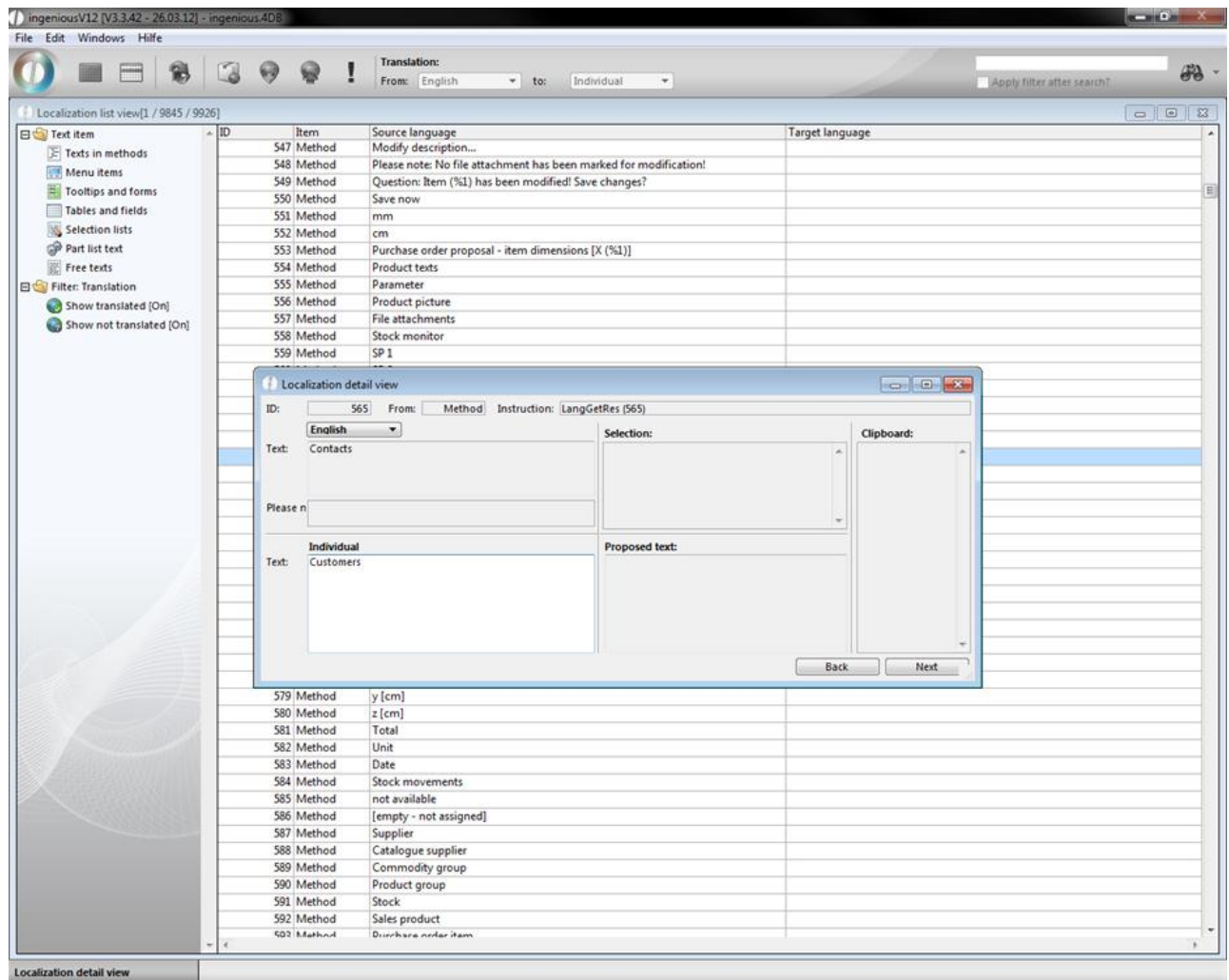
Individual language adaptation from Ingenious.V12

You already know how to use the language option "Individual" to create your own fields. With this language option, you also have the possibility to adapt all existing texts to your individual needs. In the following exercises, you change the menu text "Project time recording" to "Time management".

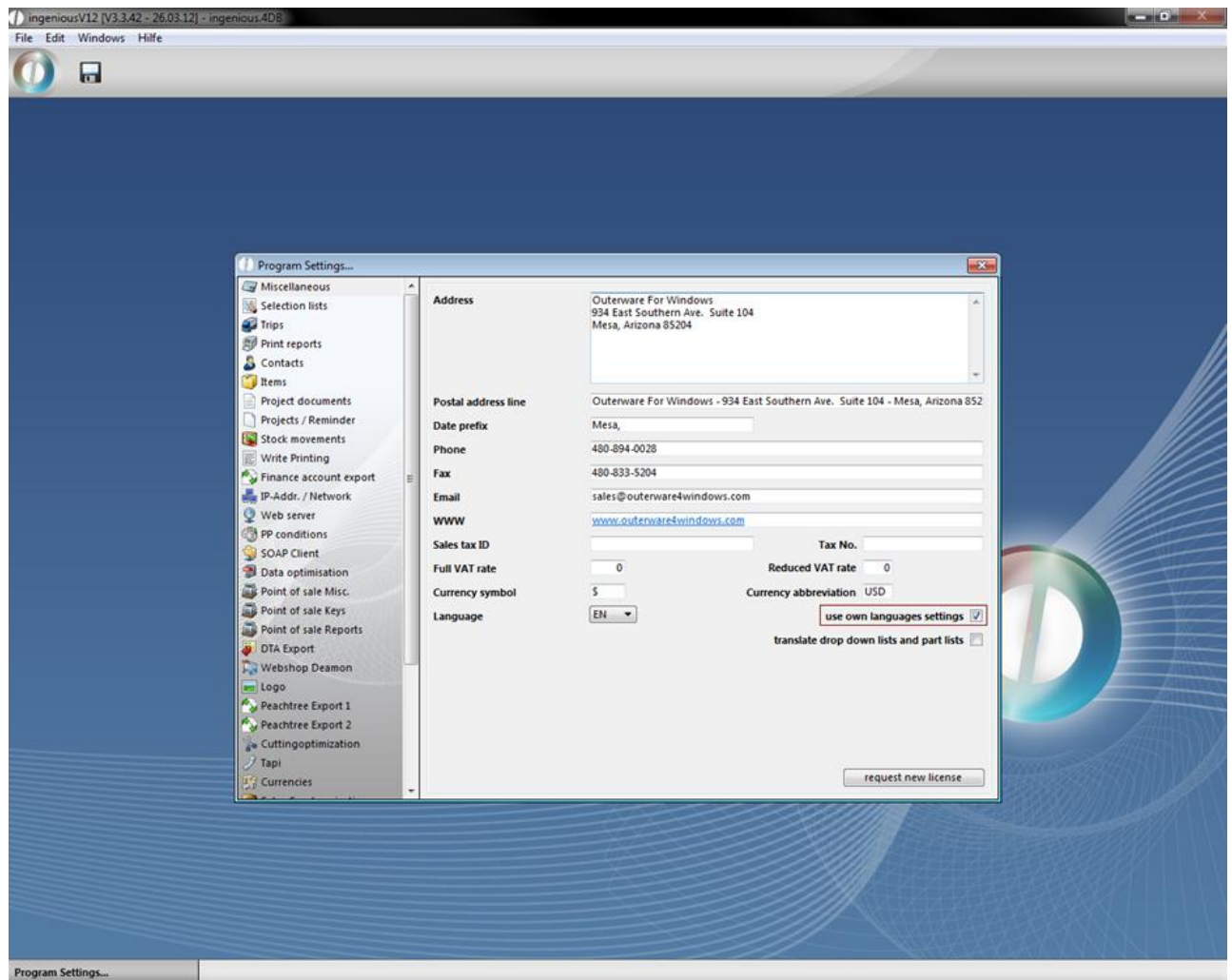
1. In the "Translation to" field, select the option, "Individual" and select the area "Text in method" in the left column.



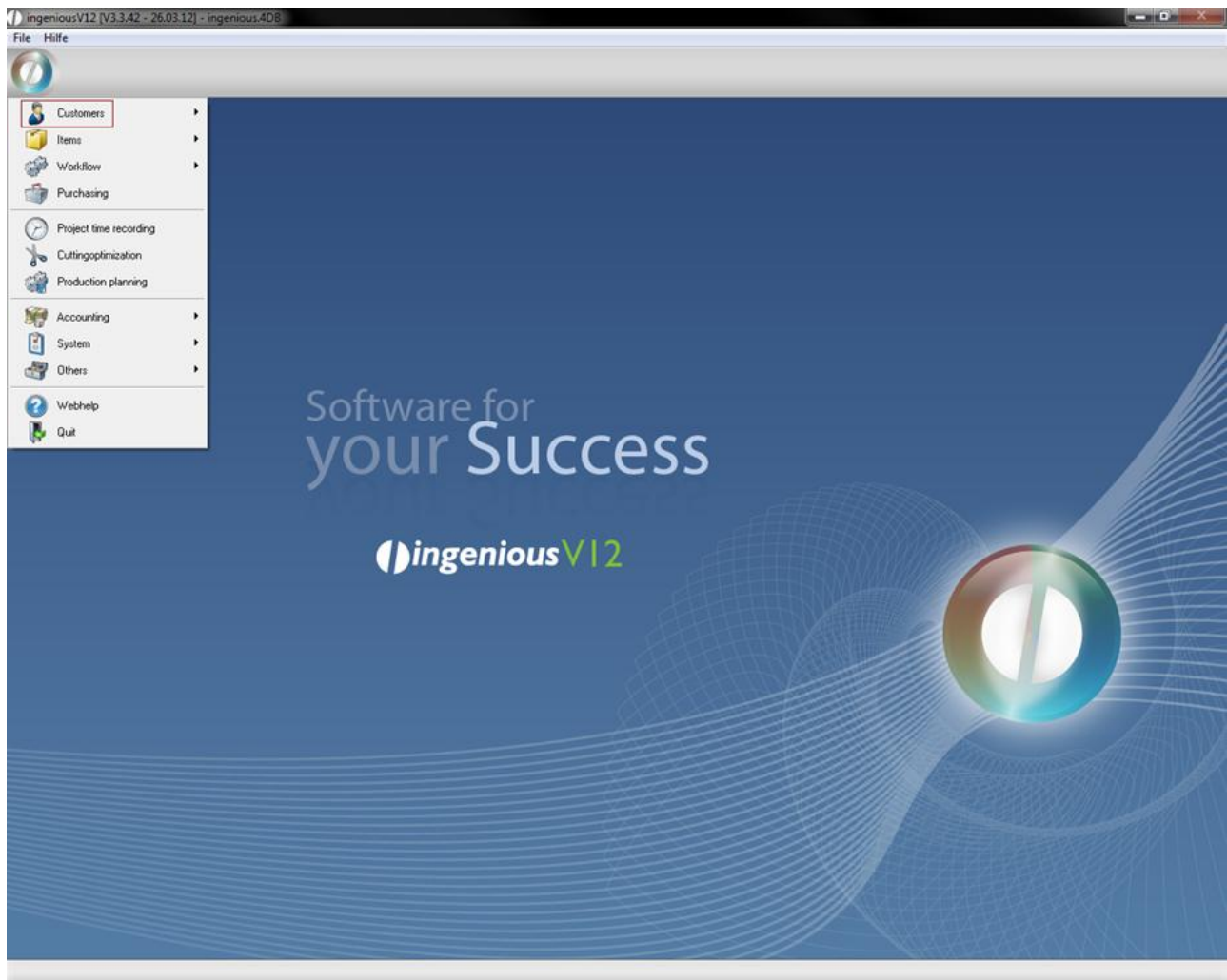
2. Open the desired method by double-clicking and enter the modification in "Individual" area.



3. Leave the localization module and open the program settings and enter a checkmark in the area, "Use individual language adaptation". Leave the program settings and save the changes.



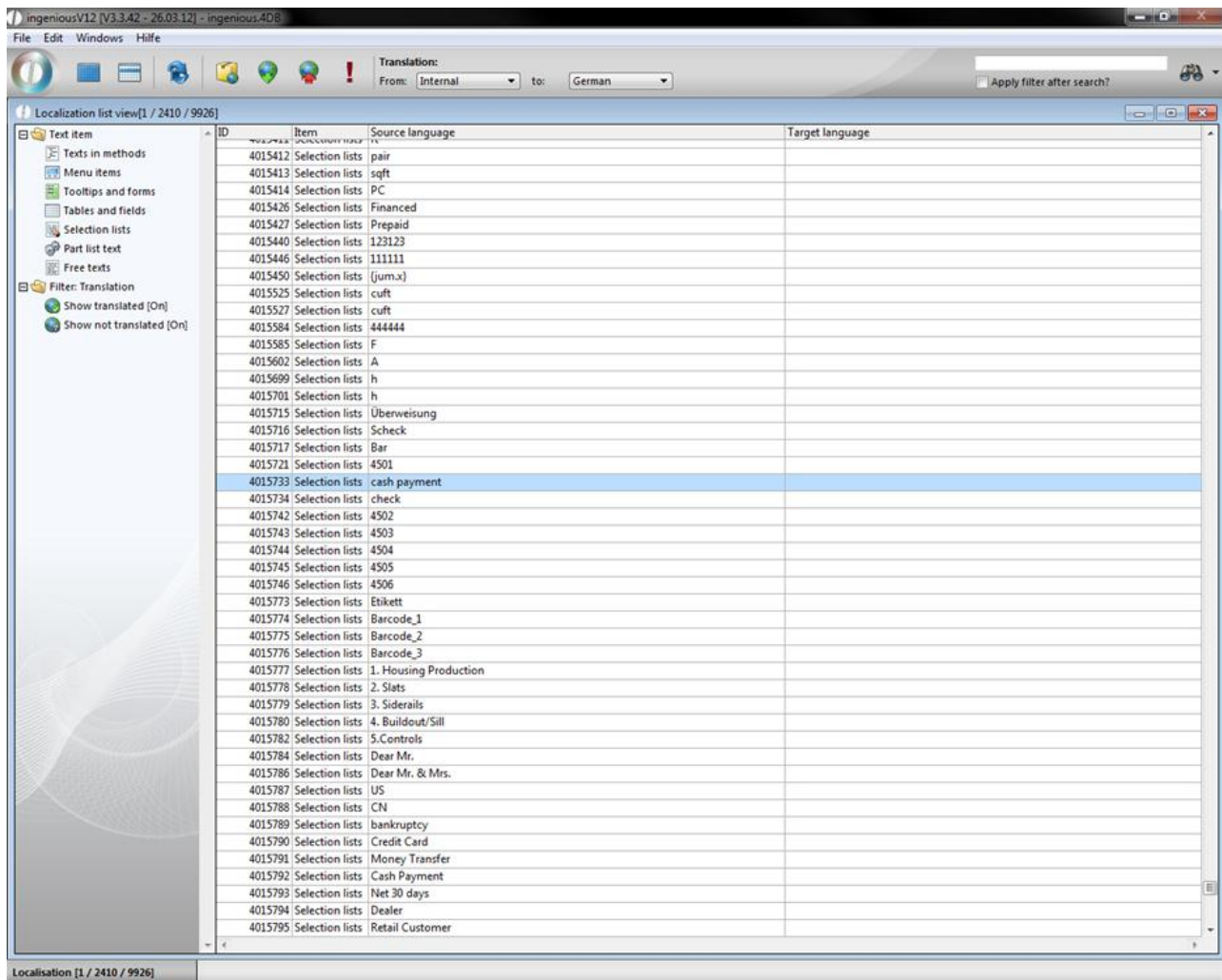
4. Close Ingenious.V12 and log on again. The desired modification will be made in the menu.



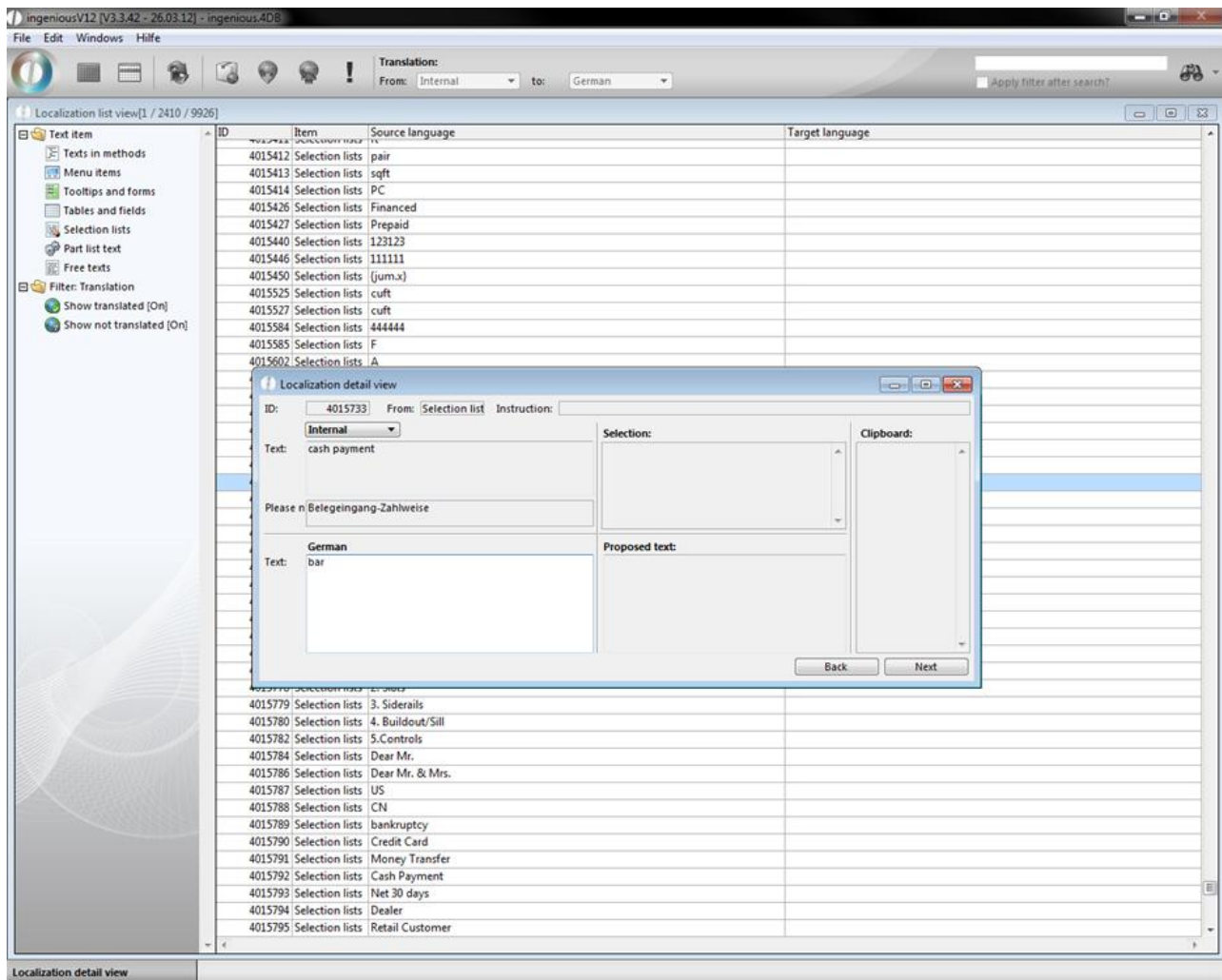
Internal language customization

With the help of the localization module selection lists, part lists and free texts can be assigned with individual names resp. localize the user inputs into another language. In the field "Translation from" the value "internal" has to be chosen. In the following practice the selection list "payment type" of the receipt entry will be translated.

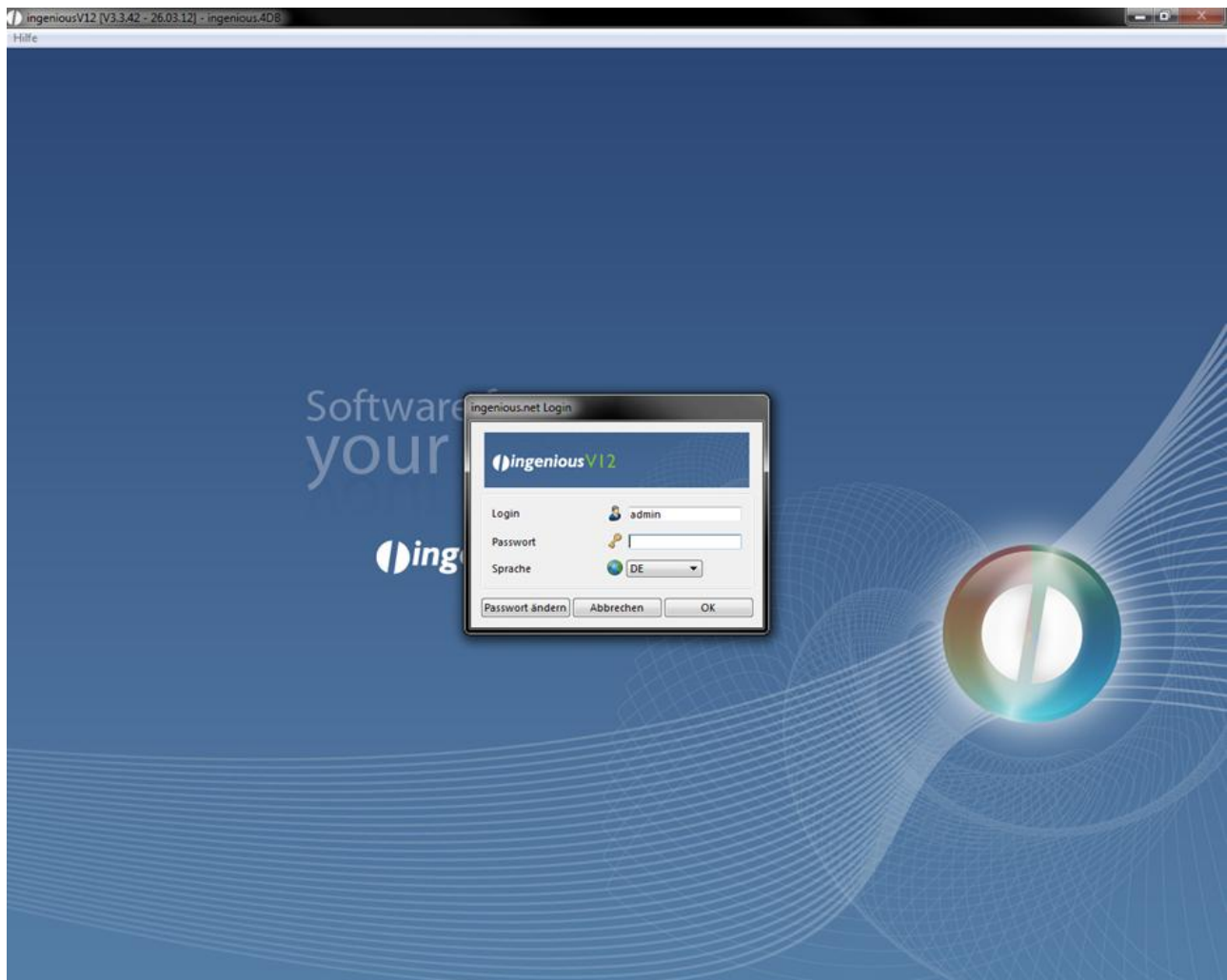
1. Select in the field "Translation" the option "internal" and "german". In the left column choose "selection lists"



2. With a double click open the detail view of the entry 4015733 and enter in the category "German" in the field "Text" the description "bar".



3. If you have done the desired translations, save the changes and close ingenious.v12. Now restart ingenious, choose the language DE and login again.



The screenshot shows the 'Belegdaten Allgemein' window in the ingenious.V12 software. The window is divided into several sections:

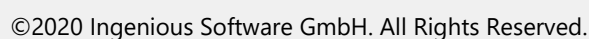
- Header:** Includes the title bar 'ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408' and a menu bar with 'File', 'Edit', 'Belege', 'Drucken', 'Druckvorschau', 'Fenster', and 'Hilfe'.
- Left Sidebar:** Contains navigation icons for 'Allgemein', 'Eigene Felder', 'Dateianlagen', and 'Belegzuordnung'.
- Main Content Area:**
 - Belegdaten Allgemein:** Fields for 'Eingangsnr.' (000004), 'Buchungsdatum' (04/14/12), 'MwSt. Satz % [halb]' (0), 'Belegnr.' (462158), 'Belegdatum' (04/14/12), and 'MwSt.-Satz % [voll]' (0).
 - Lieferantenadresse / Notizen:** A section for 'Lieferant' (Supplier2) and 'Anschritt' (234 Park Avenue, Chicago 12345). It includes a 'Notizen' (Notes) text area.
 - Rechnungsbeträge (Invoice Amounts):** A table showing various amounts:

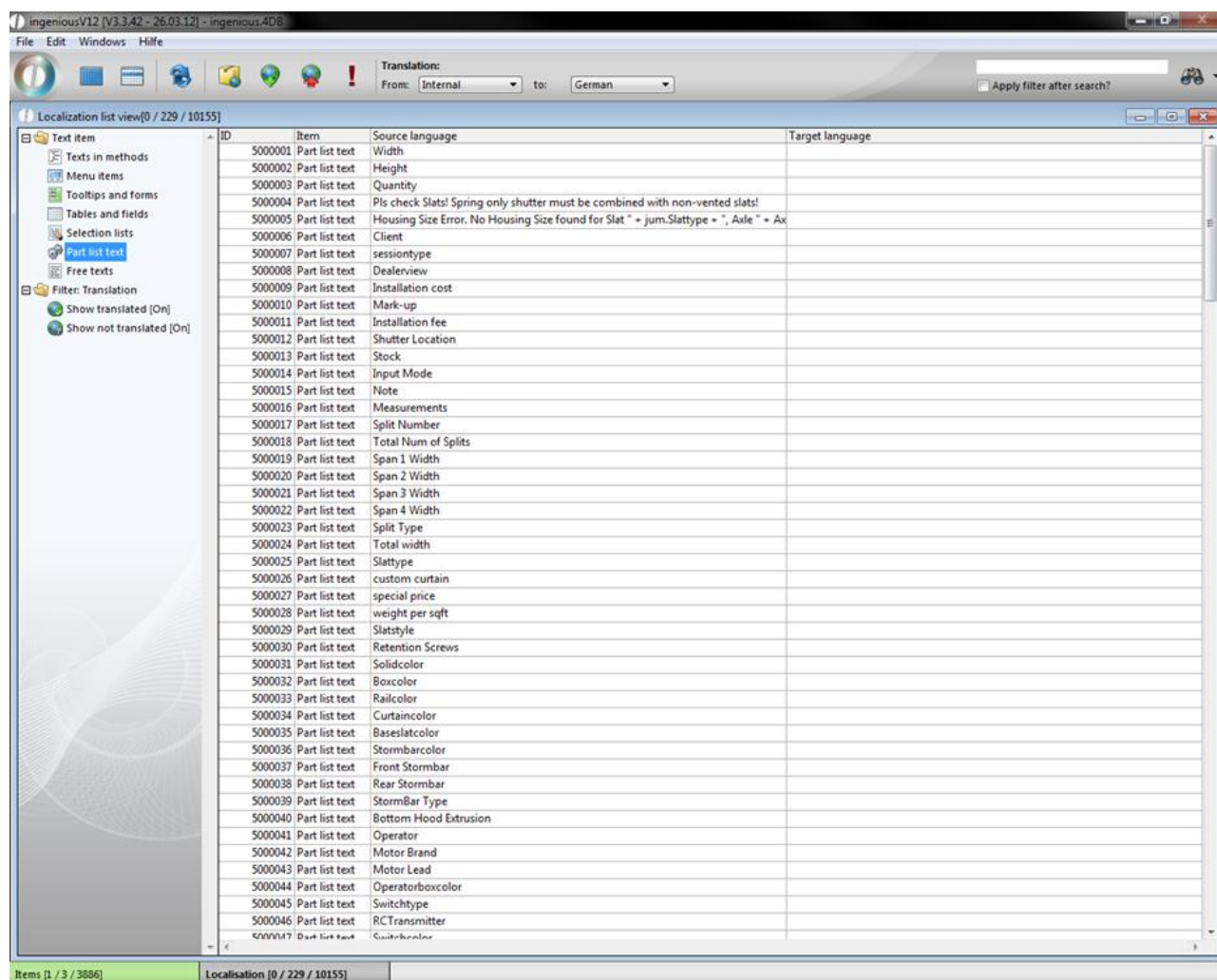
Rechnungsbeträge	Netto ohne MwSt.	Brutto ohne MwSt.	Netto halbe MwSt.	Brutto halbe MwSt.	halbe MwSt.	Netto volle MwSt.	Brutto volle MwSt.	volle MwSt.	Summe Netto	Summe Brutto	Summe MwSt.
	50.00 \$	50.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	0.00 \$	50.00 \$	50.00 \$	0.00 \$
 - Fristen (Deadlines):** Fields for 'Datum Skonto' (04/27/12) and 'Datum Ziel' (04/29/12).
 - Zahlung (Payment):** Fields for 'Skontosatz %' (10.00 %), 'Summe nach Sk.' (45.00 \$), 'Abs. Betrag Sk.' (5.00 \$), 'Zahlung' (bar, check, DTA), 'Datum Zahlung', 'Zahlart' (DTA), 'DTA Export am' (00/00/00), and checkboxes for 'DTA Exportiert' and 'Status Abgeschlossen'.
 - Footer:** Fields for 'erstellt' (4/26/2012 14:07:02 - admin) and 'geändert' (4/26/2012 14:36:37 - admin).


The values of the selection lists are taken from the program settings and the part lists from the items. You can transfer the part list texts to the localization module. For instance open any part list and click on the button "create part list translation"

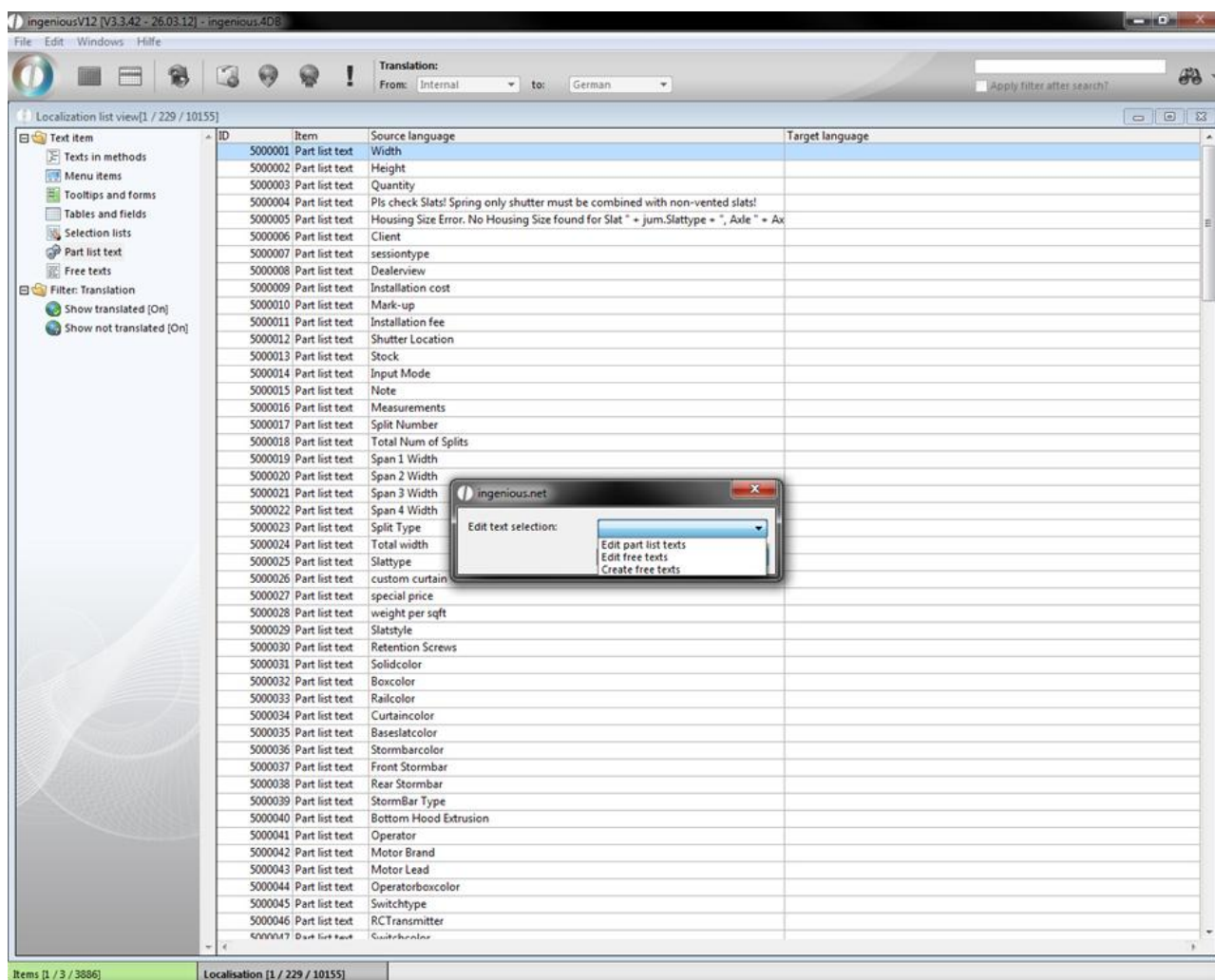


A window will open up where all texts of the corresponding part list are listed. In the column description you can add an advanced description, which should simplify the translation. If you uncheck the field in the last column of a line, then the text will not be transferred to the localization.

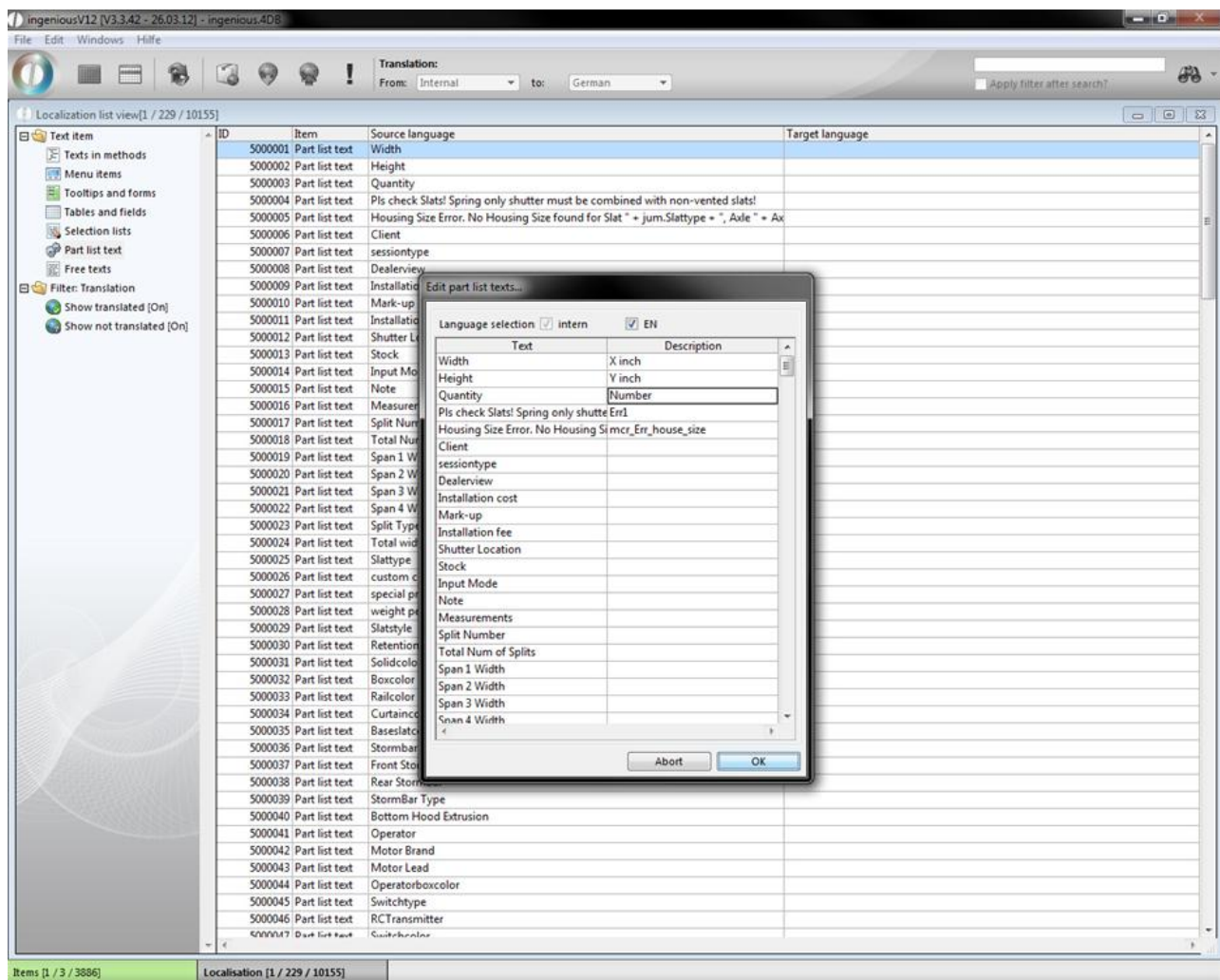




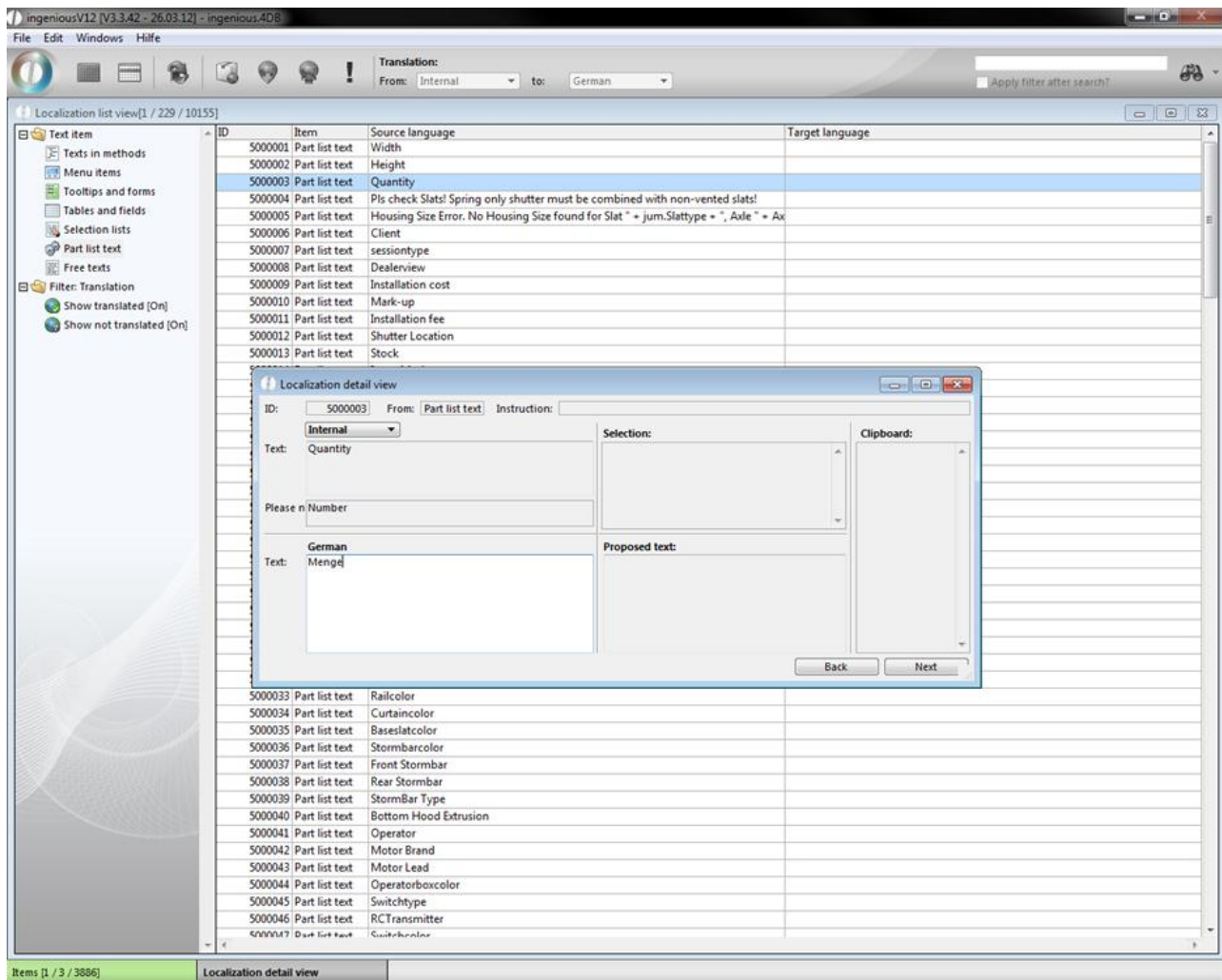
You can also add additional descriptions directly in the localization module. With the button  you can modify the part list texts.




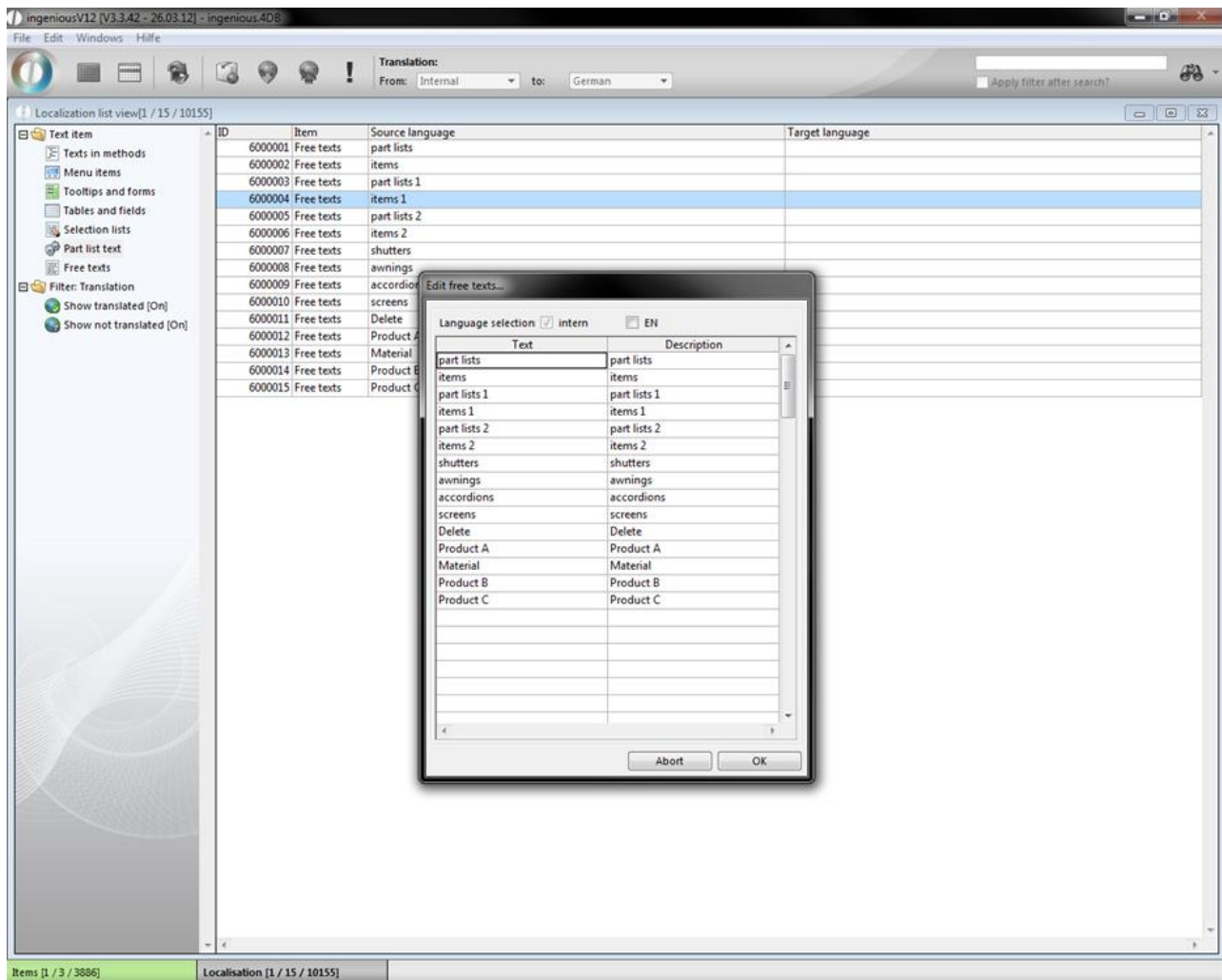
A window will open up, where all part list texts are listed. Here you have got the possibility to rename the texts or add a description in the field "Description". When you check the field "EN", the additional descriptions will be displayed automatically in the english translation.



After you accepted the changes by clicking "ok" and open the detail view of a term, the defined description is displayed.



The free texts are created and modified with the help of the button , too. Free texts are free definable, they don't have a special meaning in ingenious.V12. With the help of free texts you can for instance create descriptions and translations for individual scripts.

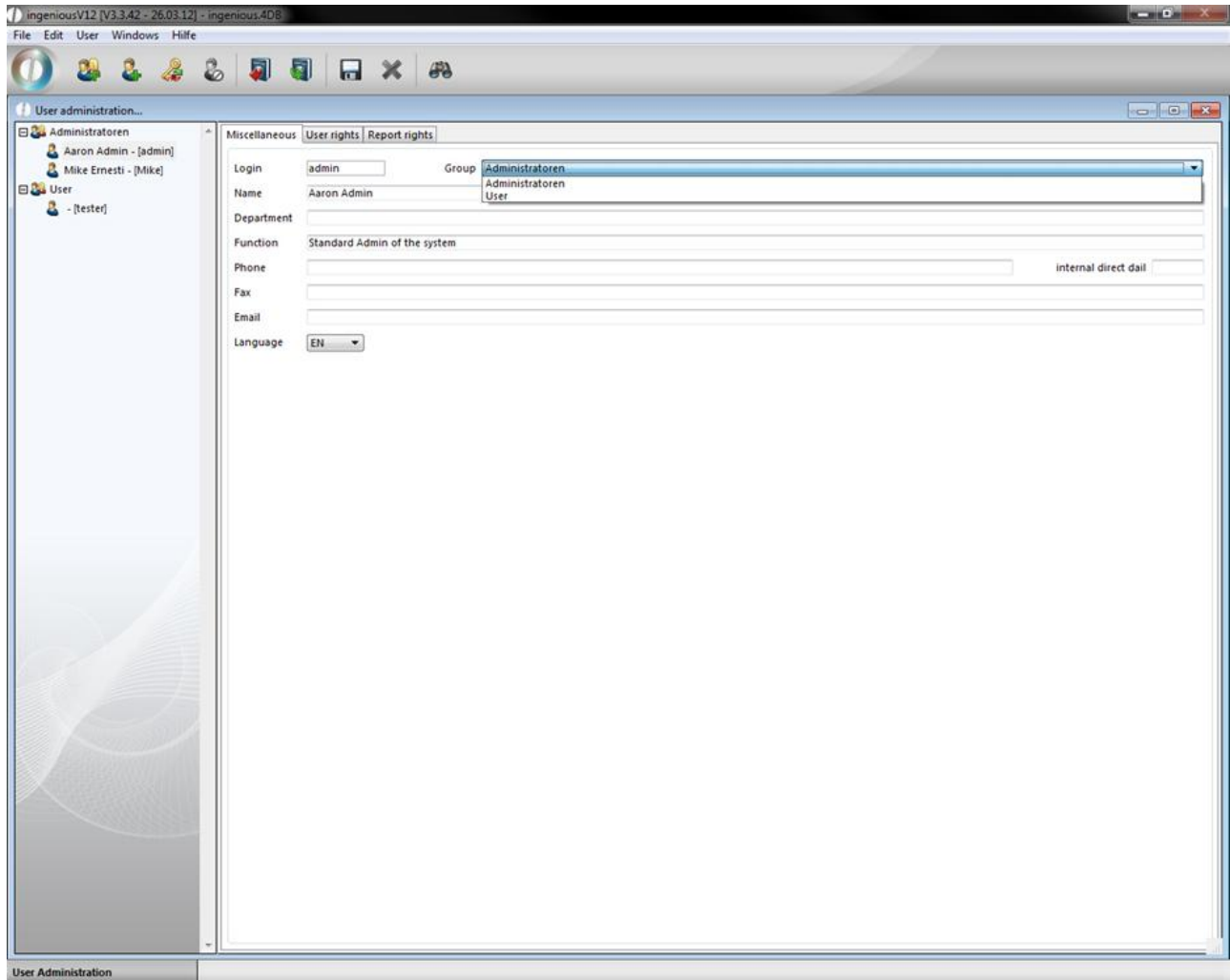


6.6 User administration

Administration of users is just as easy as the administration of articles and contacts in Ingenious.V12. All "Users", that is every operator who would like to work with Ingenious.V12 needs an access account in order to log on to Ingenious.V12. This account at least consists of the login name, the password and the user group (several users with the same rights). Of course, with this account you cannot only arrange the users in groups, but you also have the possibility to issue individual rights for each user, or also deny them. In addition, information about each user can be stored and thus the user rights changed any time.

General

The start view of the user administration has a tree diagram on the left side, showing the group membership of each user, and on the right side detail data for each respective user in the register card "Miscellaneous". Here you can assign a user to a group or a section. In addition, fields for "Name", "Function", "Telephone", "E-Mail and a pop-up field for the selection of the user's language can be installed.



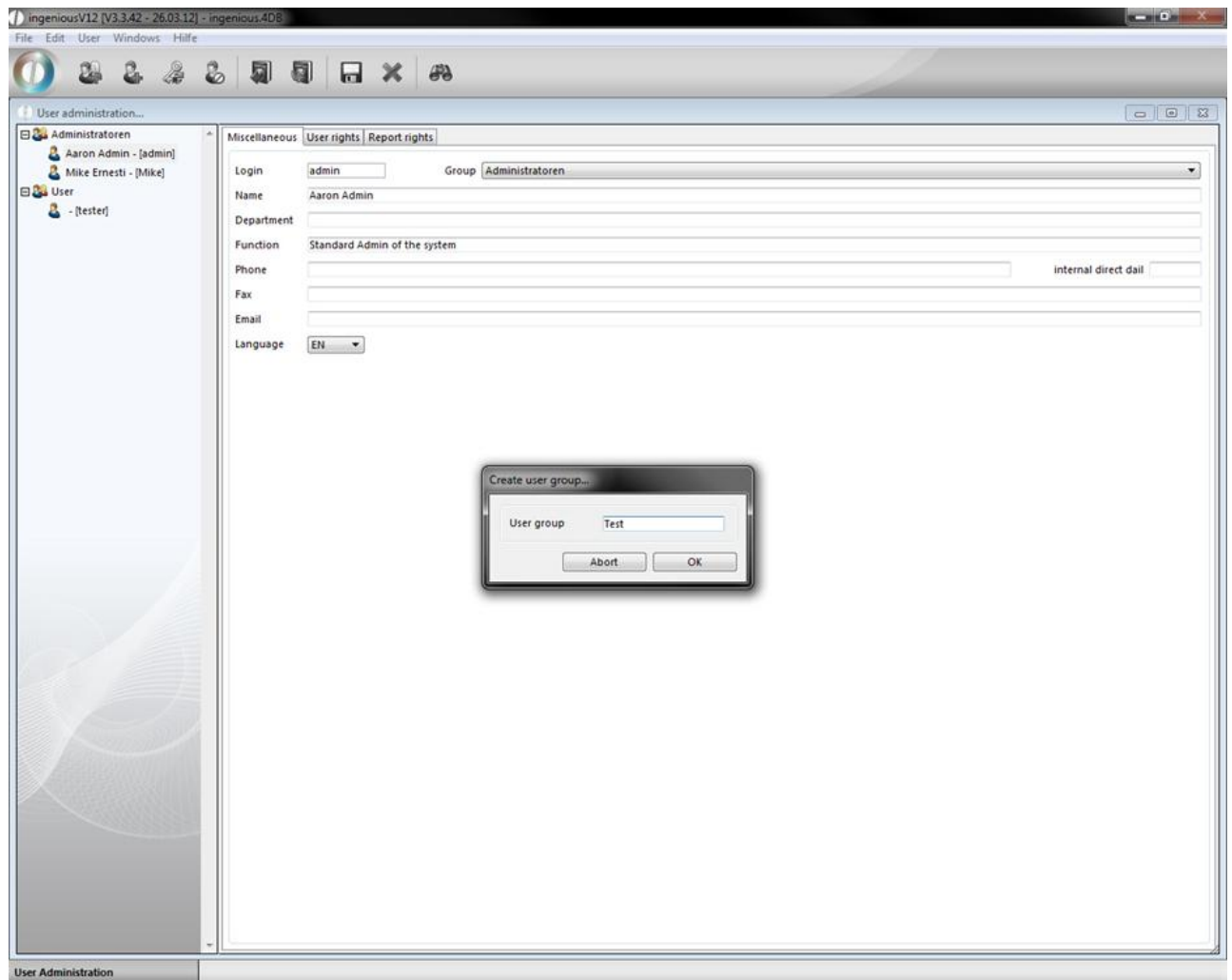
User administration

User administration controls the access to confidential internal data, thus only authorized personnel of your company should be allowed to open the user administration and issue user rights. However, at least one user profile that has unlimited rights from Ingenious .net should exist. In the computer world such a user is identified as "Administrator". He/ she has the possibility to enter new users or groups and to modify or delete them. Should there be more than one of the so-called "Admin" in your company (i.e. director, deputy), it would be sensible to establish a separate group. In the following exercises, you will learn how to establish a group or a user, how to modify passwords, how to deactivate users temporarily or delete them.

Attaching a new group

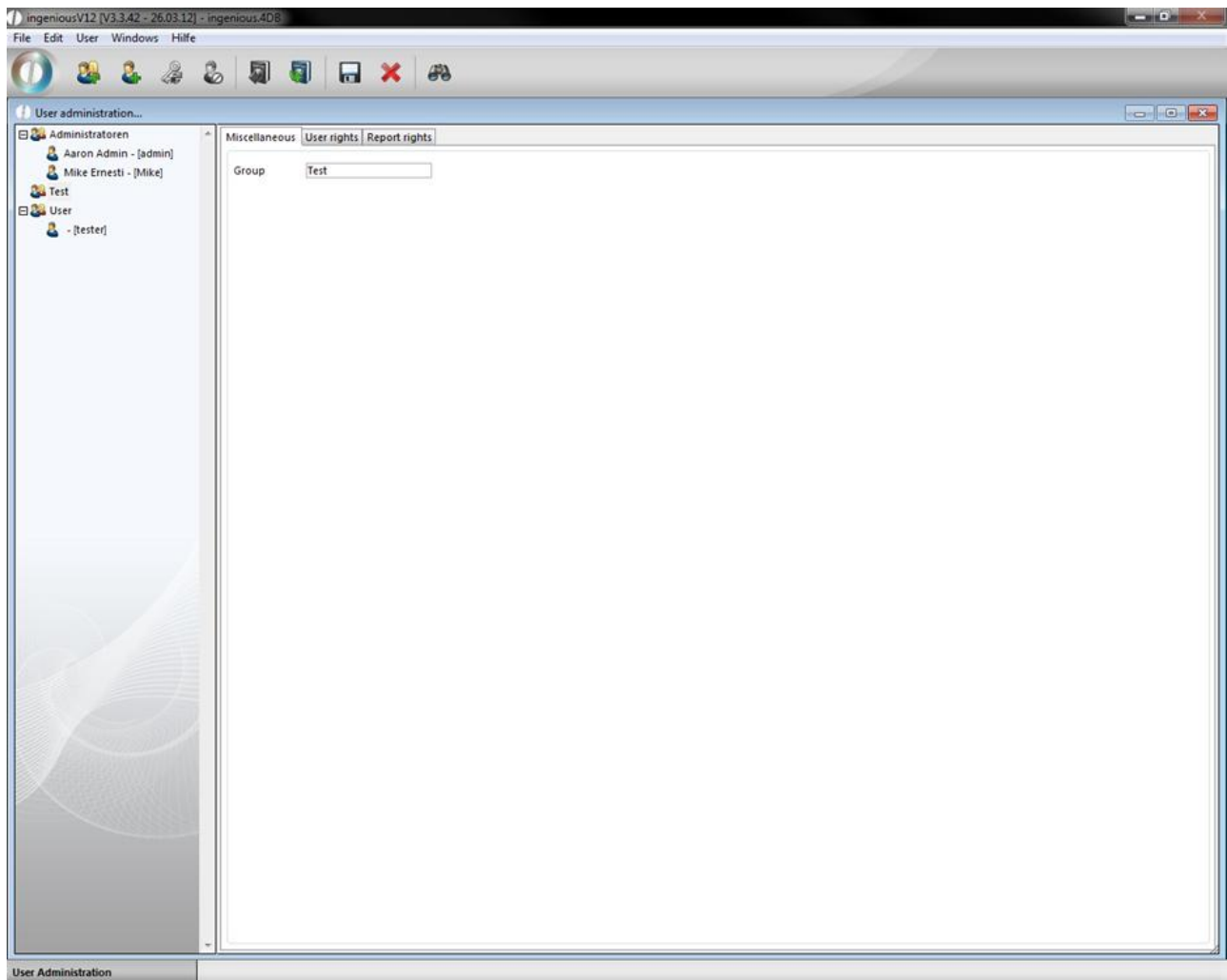
Only a few steps/clicks are necessary to attach a new group.

1. First click on the button.
2. A menu appears to give the group a name. Here please enter the group name "Test" for practice purposes.



3. The group appears with a group icon in the tree diagram (left) of the user administration.

The group profile as well as the user profile consist of three index cards with numerous possibilities to limit rights.



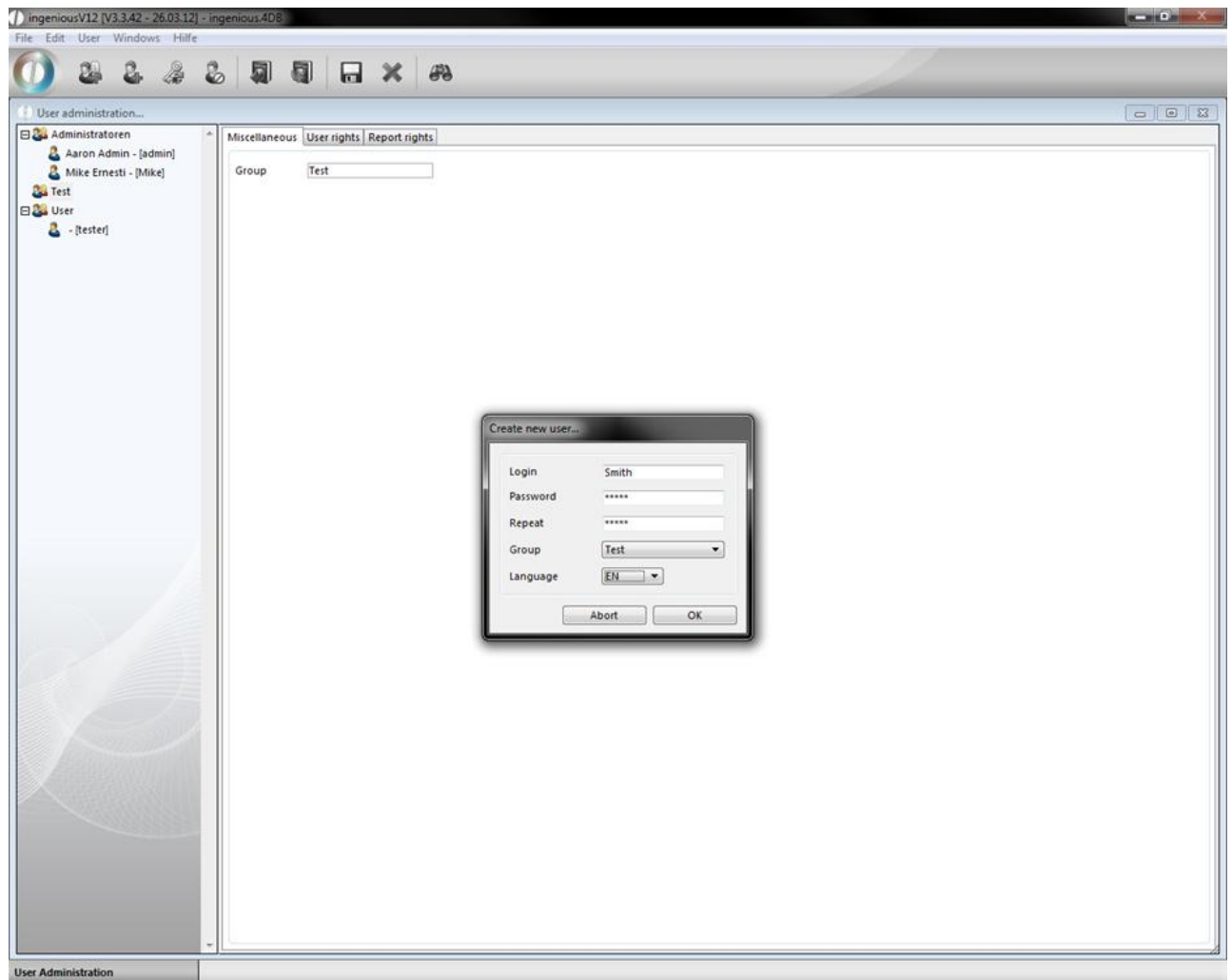
Register card "General"

Installing a new user.

Before one adds a user right, one must think about what the user must be able to do, in order for the coworker to complete his tasks. Everything that is not needed for the coworker's task should be denied him for security reasons. This way it cannot happen that an intern accidentally deletes all contacts.

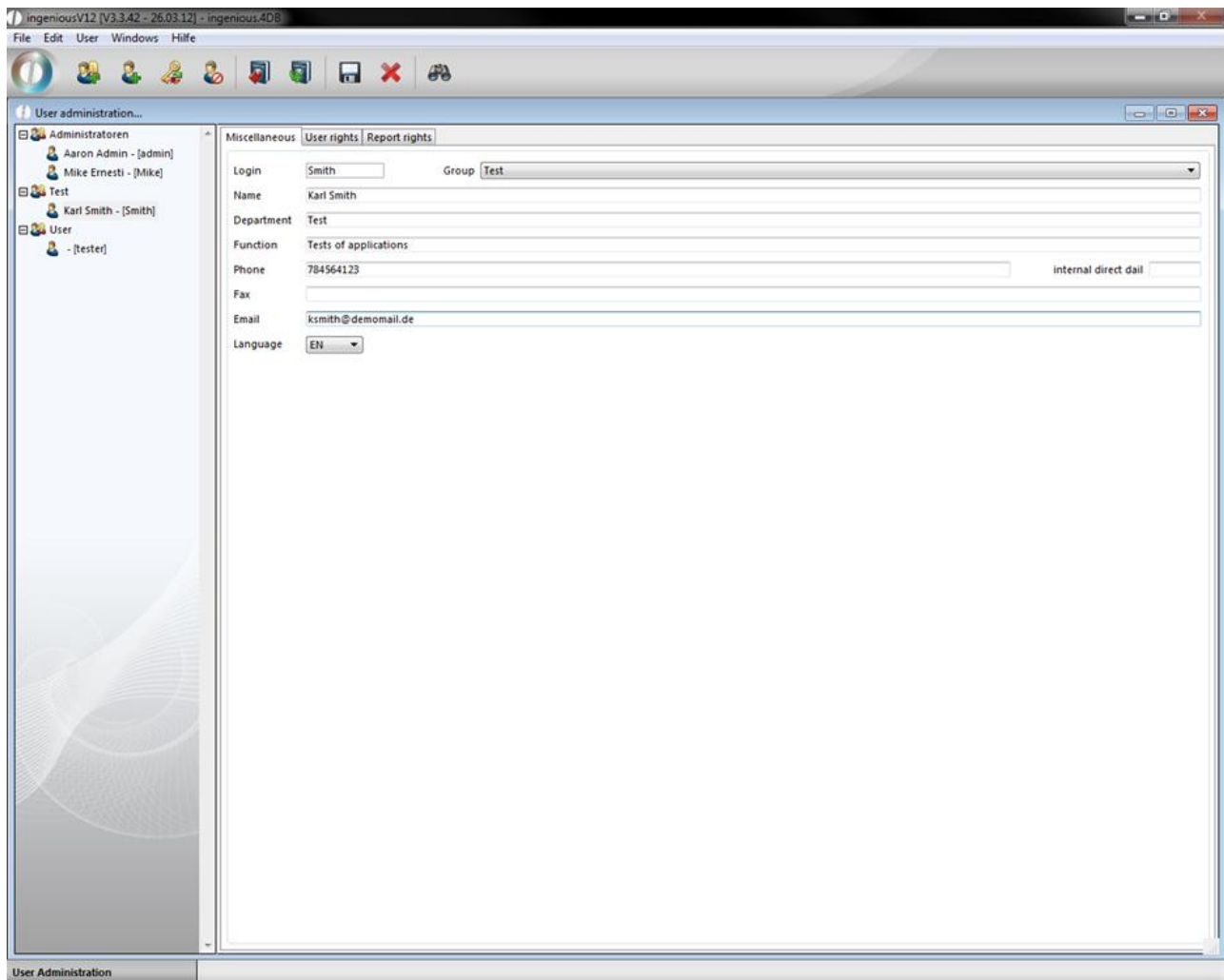
In order to attach a new user, proceed as follows:

1. Click on the "Create new user" button.
2. A window opens for the data entry. Enter the necessary data such as "Login name", "Login Password" and "Group".



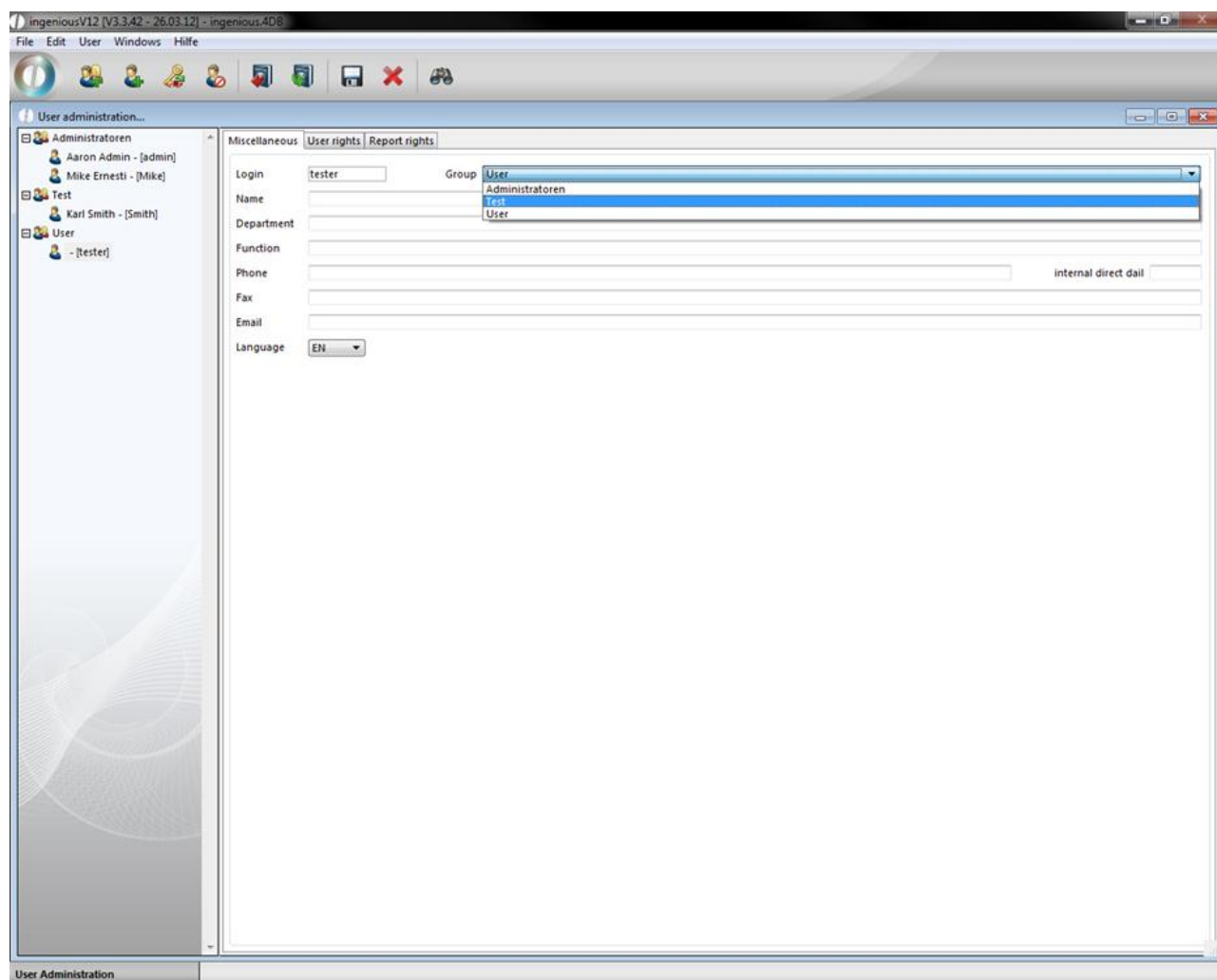
3. Confirm with the "OK" button.

The user profile of the selected group is assigned in the tree diagram and can be edited.

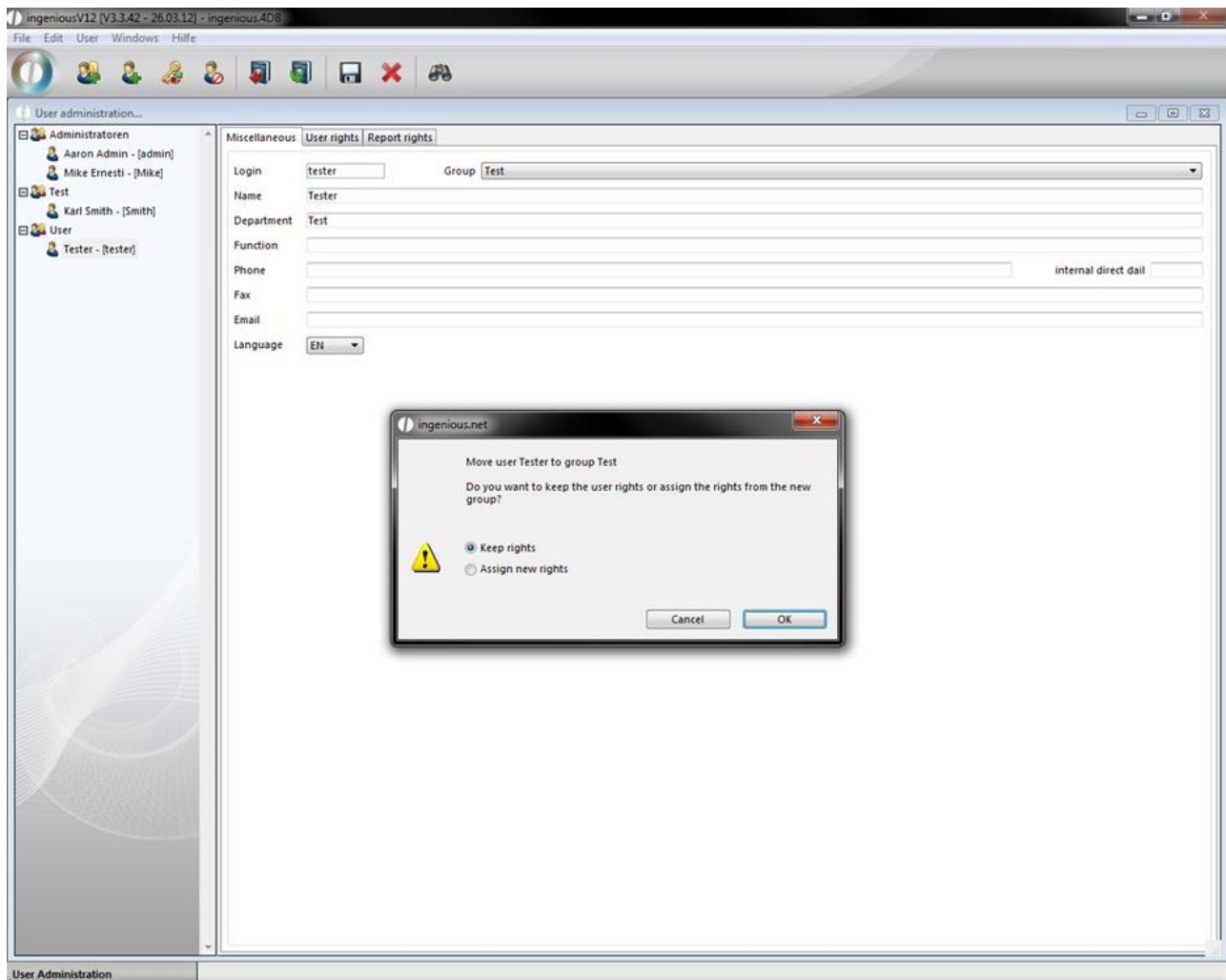


Assigning users another group

1. Select the moved user profile with a mouse click from the tree diagram.
2. In the pop-up field in the "Miscellaneous" register select the new group (in this example, please select the "Test" group).



A security question appears to ask if the user profile really should be moved.



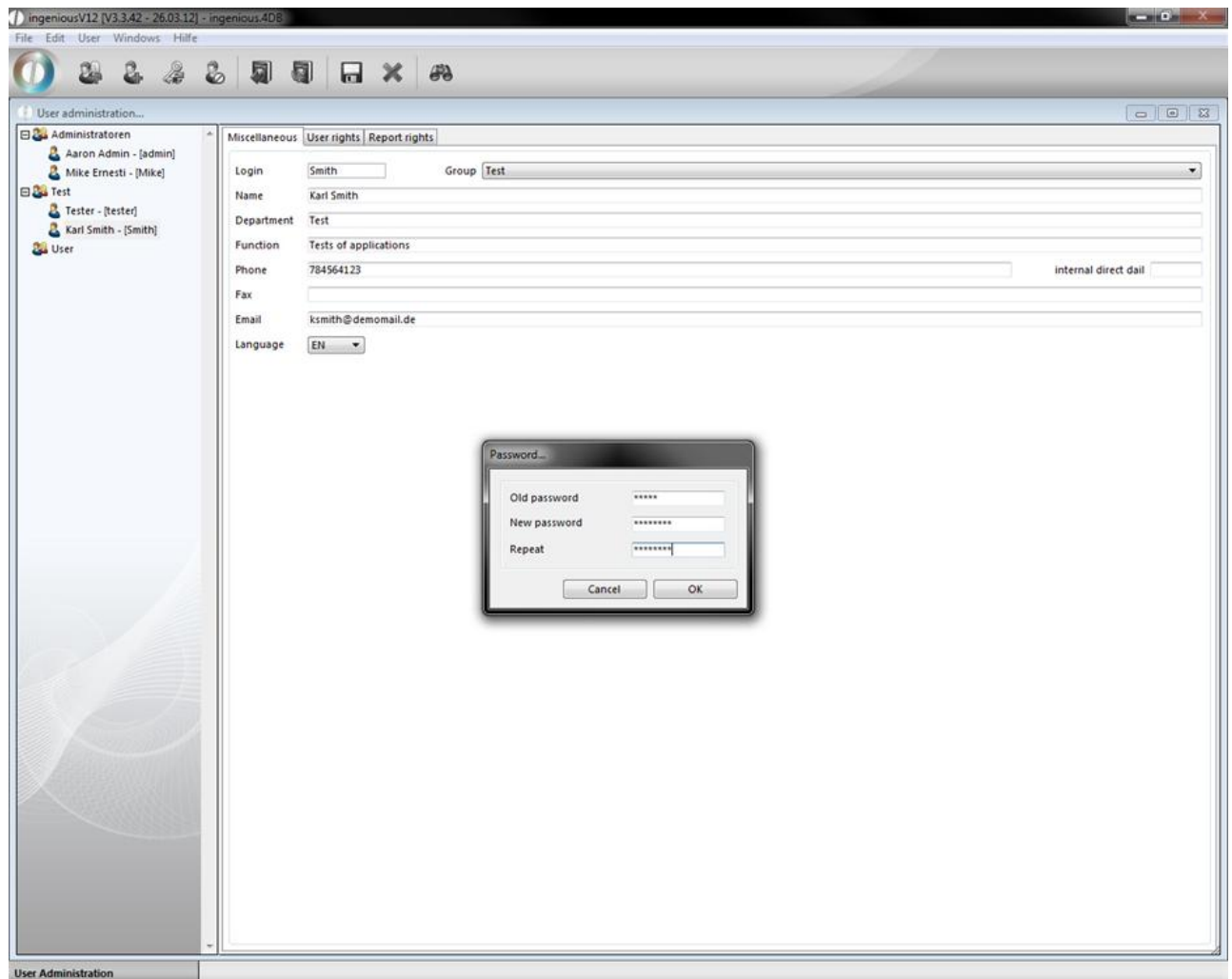
3. After the confirmation with the "OK" button, the user in the new group appears.

Save user password

In order to change a password, proceed as follows:


1. Click on the button.

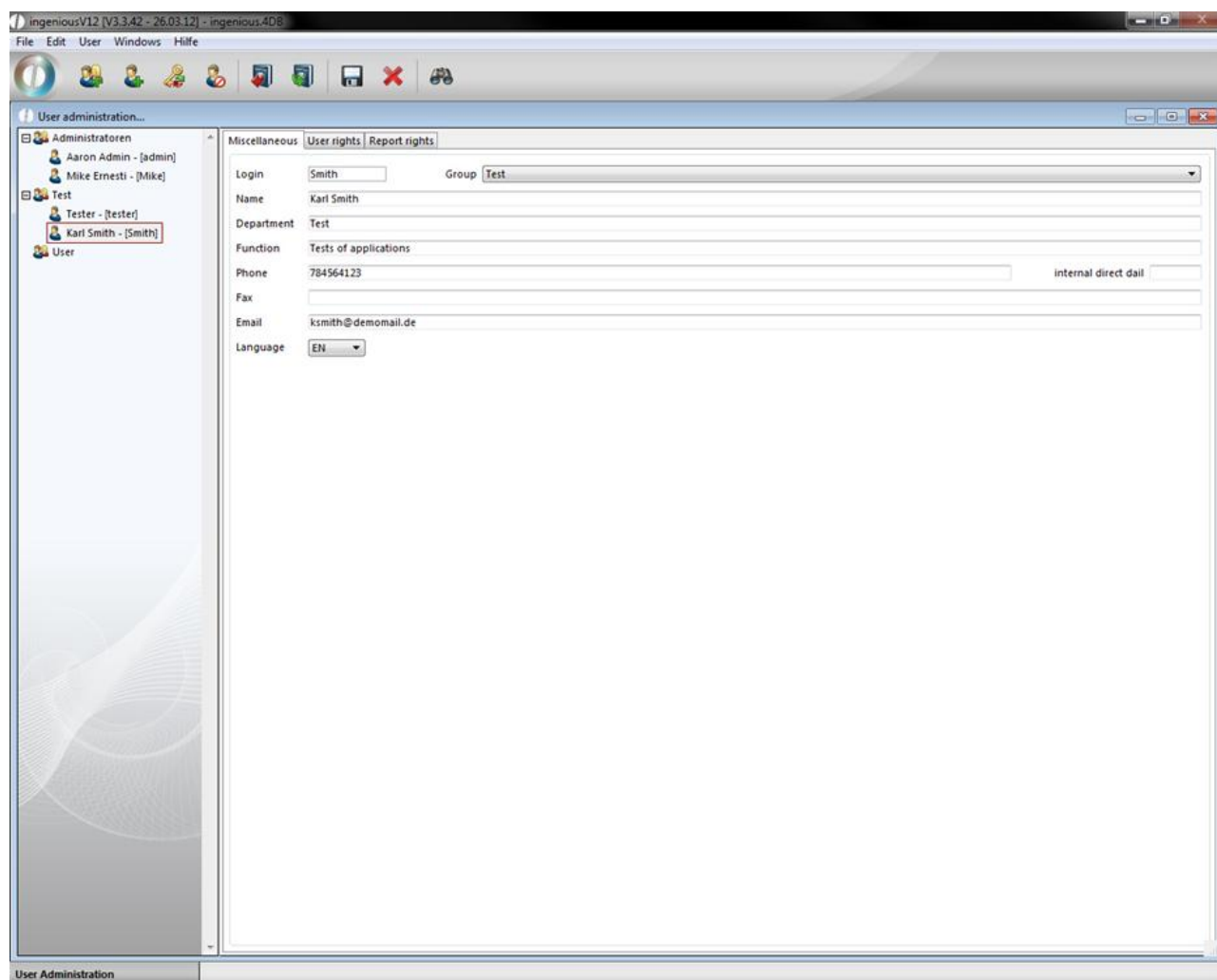
A window opens to replace the old password with a new one.



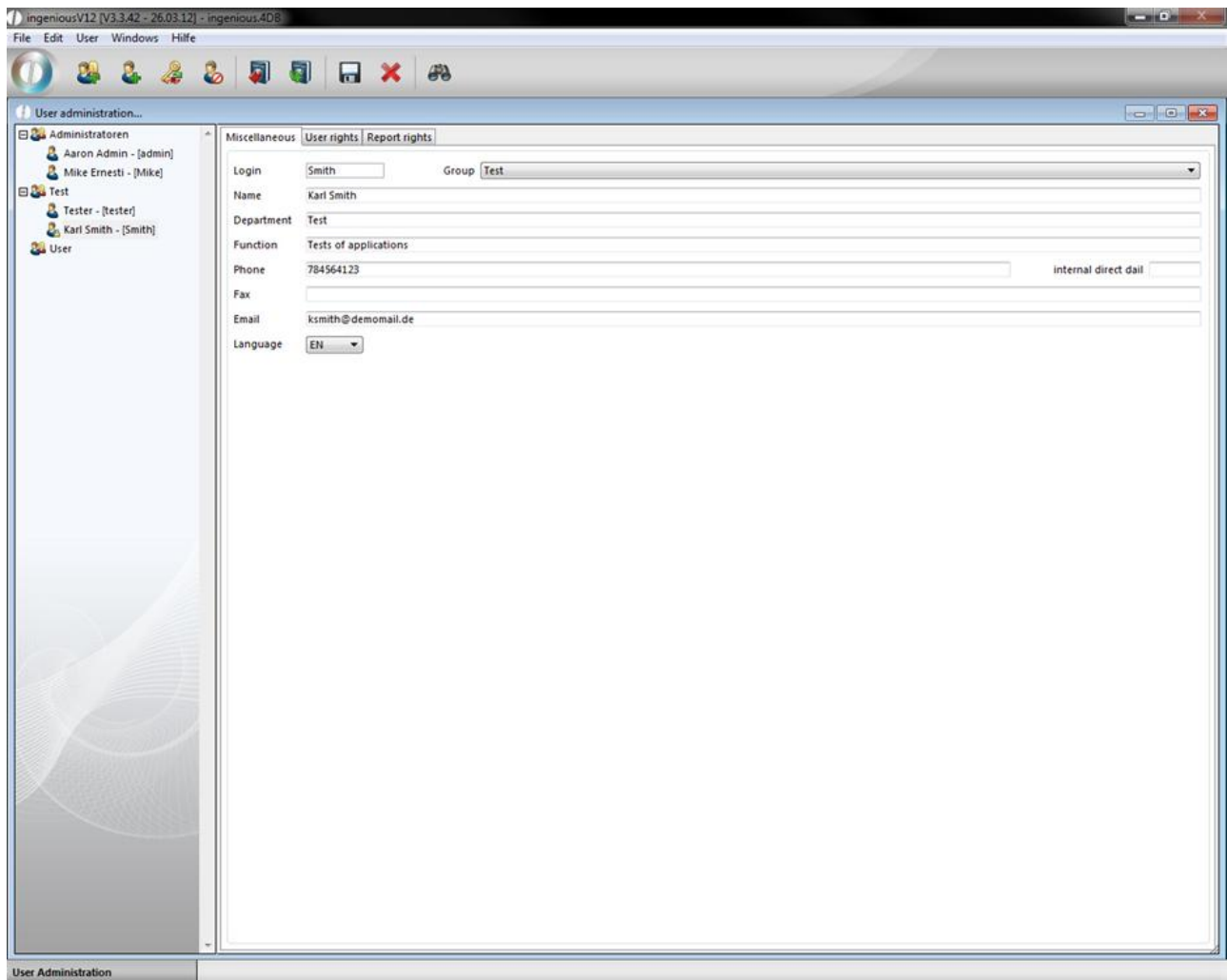
2. After the password change, click on "OK" in order to activate the changes.

Deactivate users

In order to temporarily deactivate the user, while a coworker is on vacation for instance, only a click on the  button is necessary. The view of the user in the tree structure changes as follows:




Active user



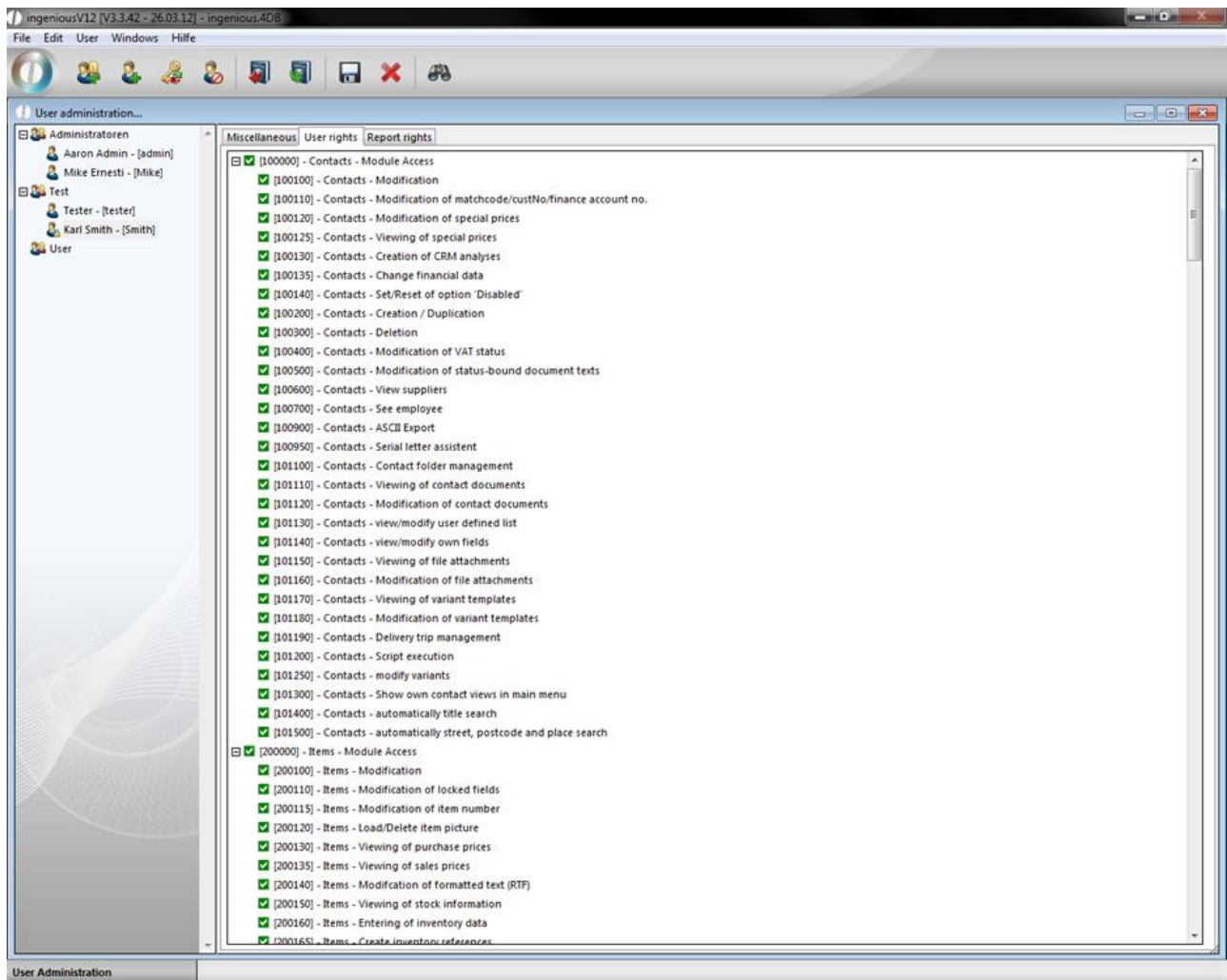
Deactivated user

Delete user or group

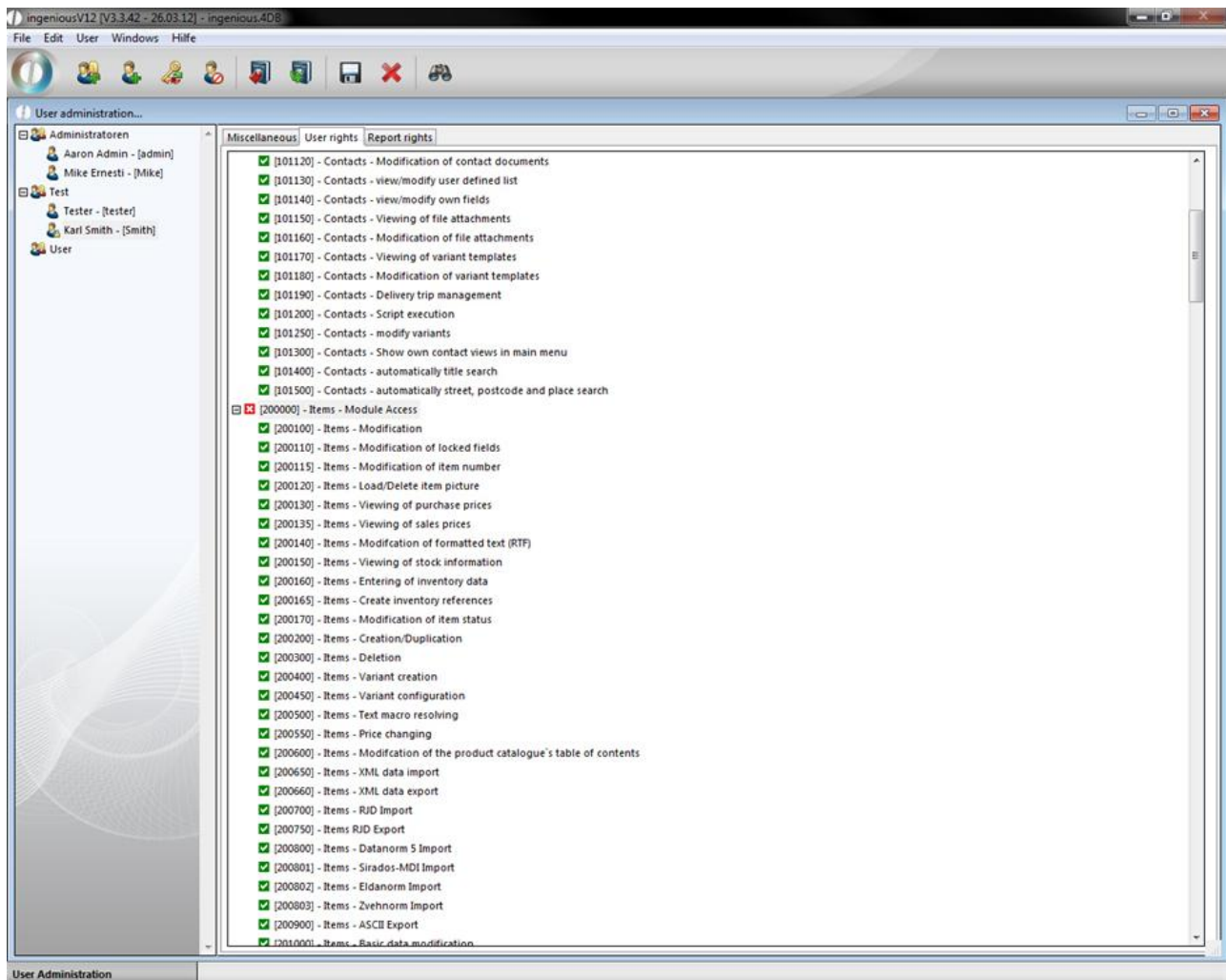
The deletion of users or groups occurs with the  button.

User rights

The register card "User rights" comprises all rights that a user can have in order to make changes in Ingenious.V12. These are like group membership displayed in a tree diagram. Here you can limit the user rights for the work in individual modules and administration tools.

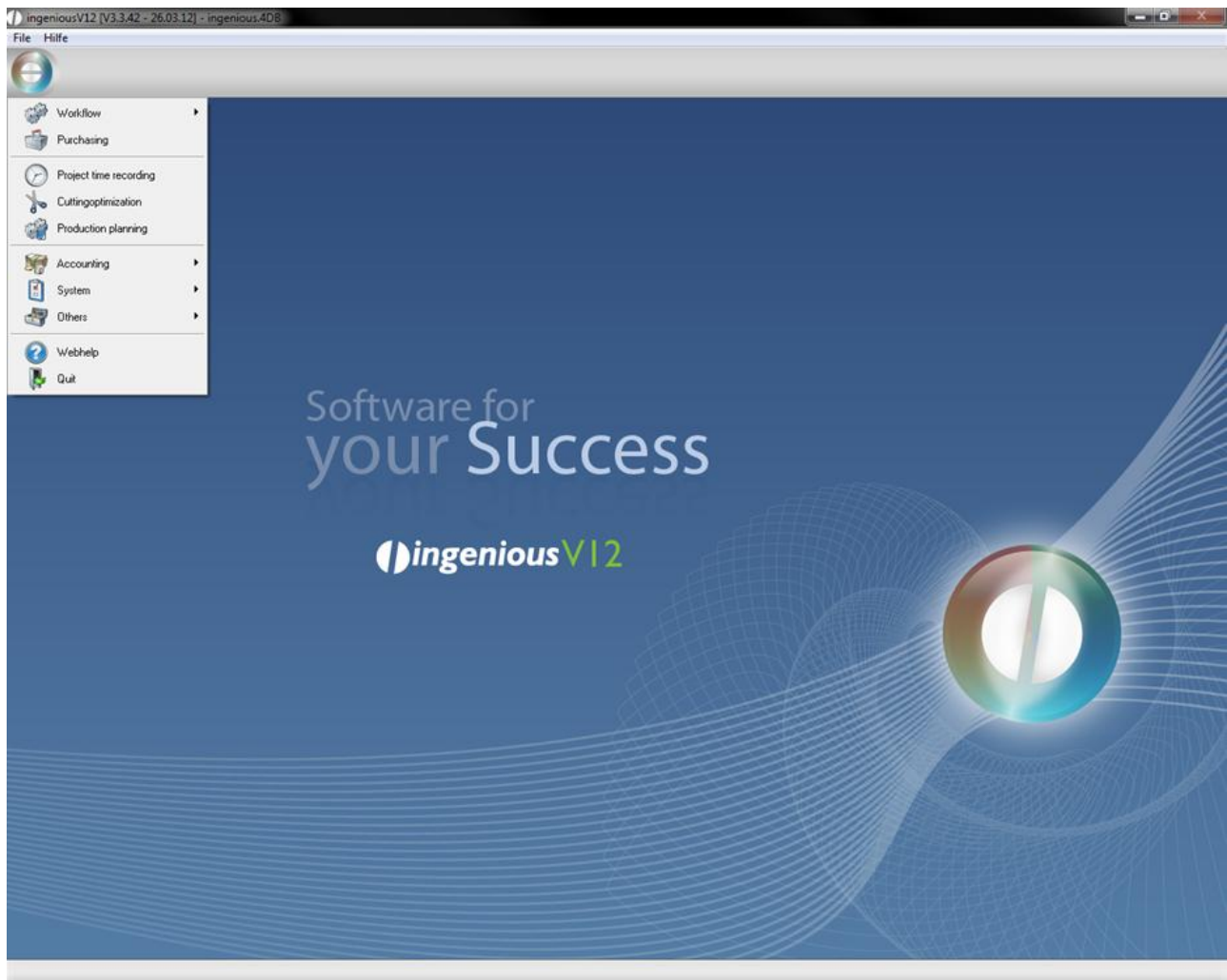


There are two options to limit user rights. Either you completely block the user from accessing a module, or you limit the rights within a module. In order to block total access to a module, a click on the mentioned so-called collective right of this module is sufficient. A collective right (also called a rough right) can comprise several subordinate rights (so-called special rights). If one deactivates such a collective right by double-clicking (✓ activated, ✗ deactivated), all (subordinate) rights included herein are deactivated.

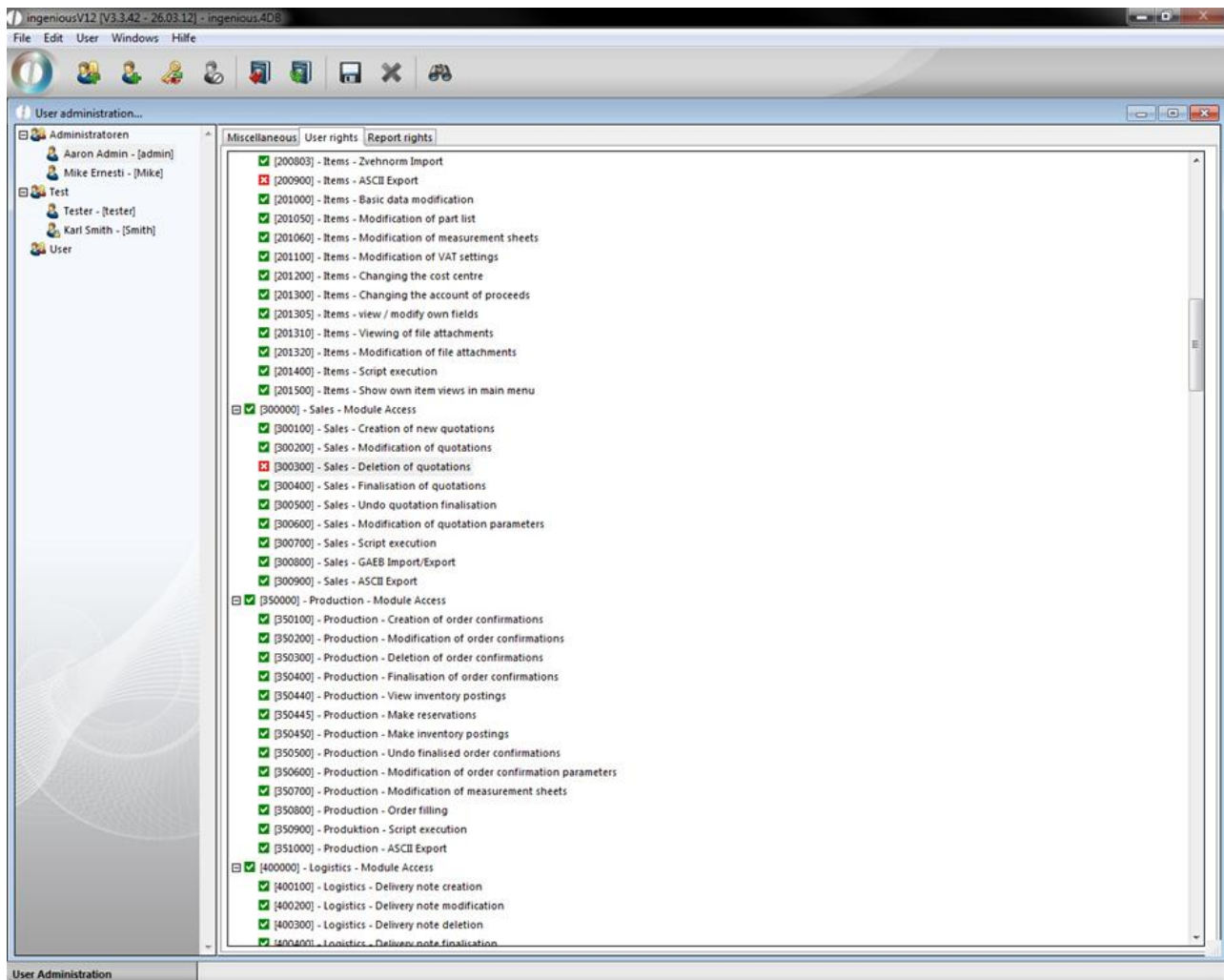


Module access sales deactivated

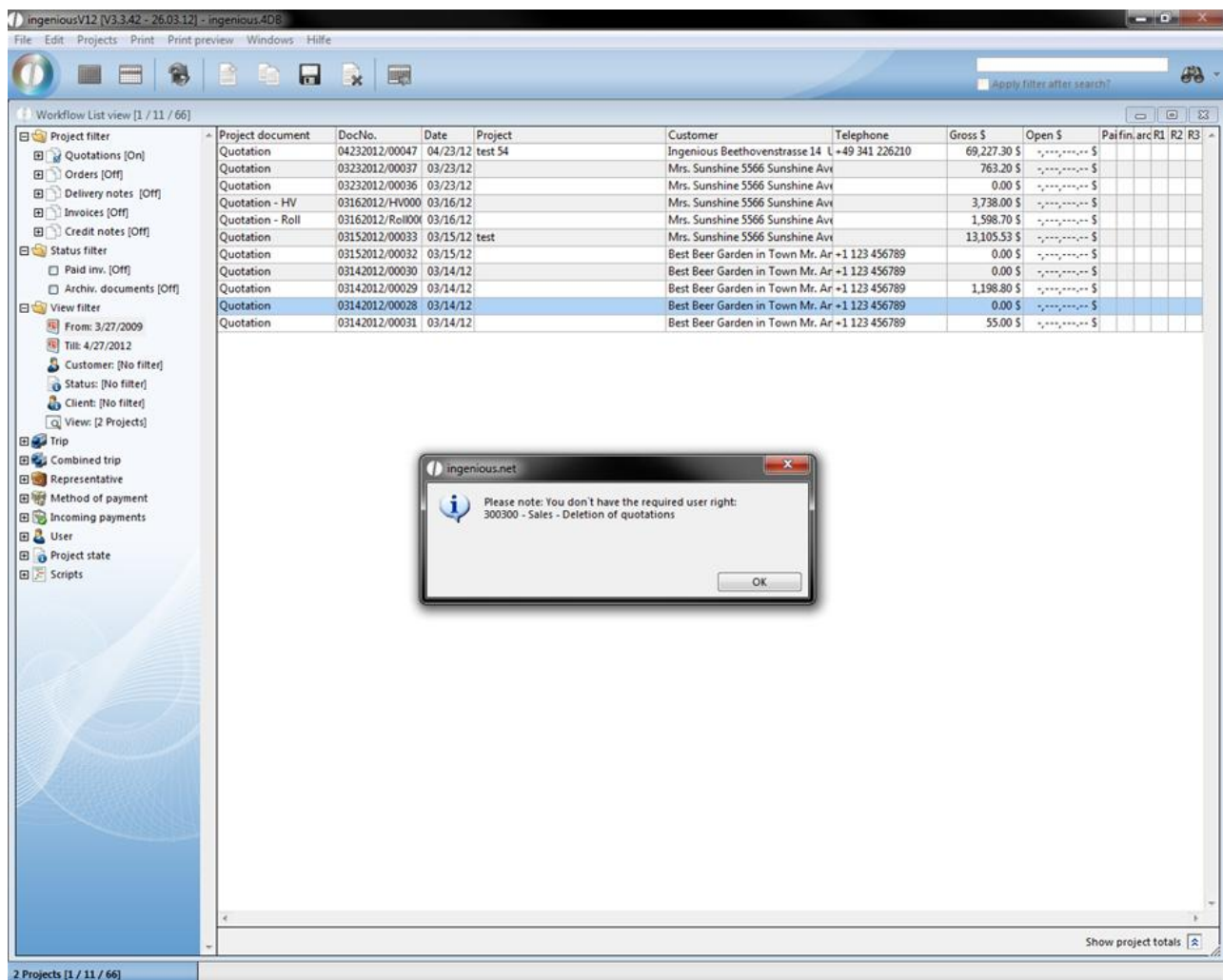
Total access to the module is now denied the user. At the next user login, the "Sales" module is not visible to the user anymore.



Should a user have to revert to data in the "Distribution" module, but is not allowed to delete quotations, the special right "Deletion of quotations" will be deactivated.



The user cannot delete any quotations

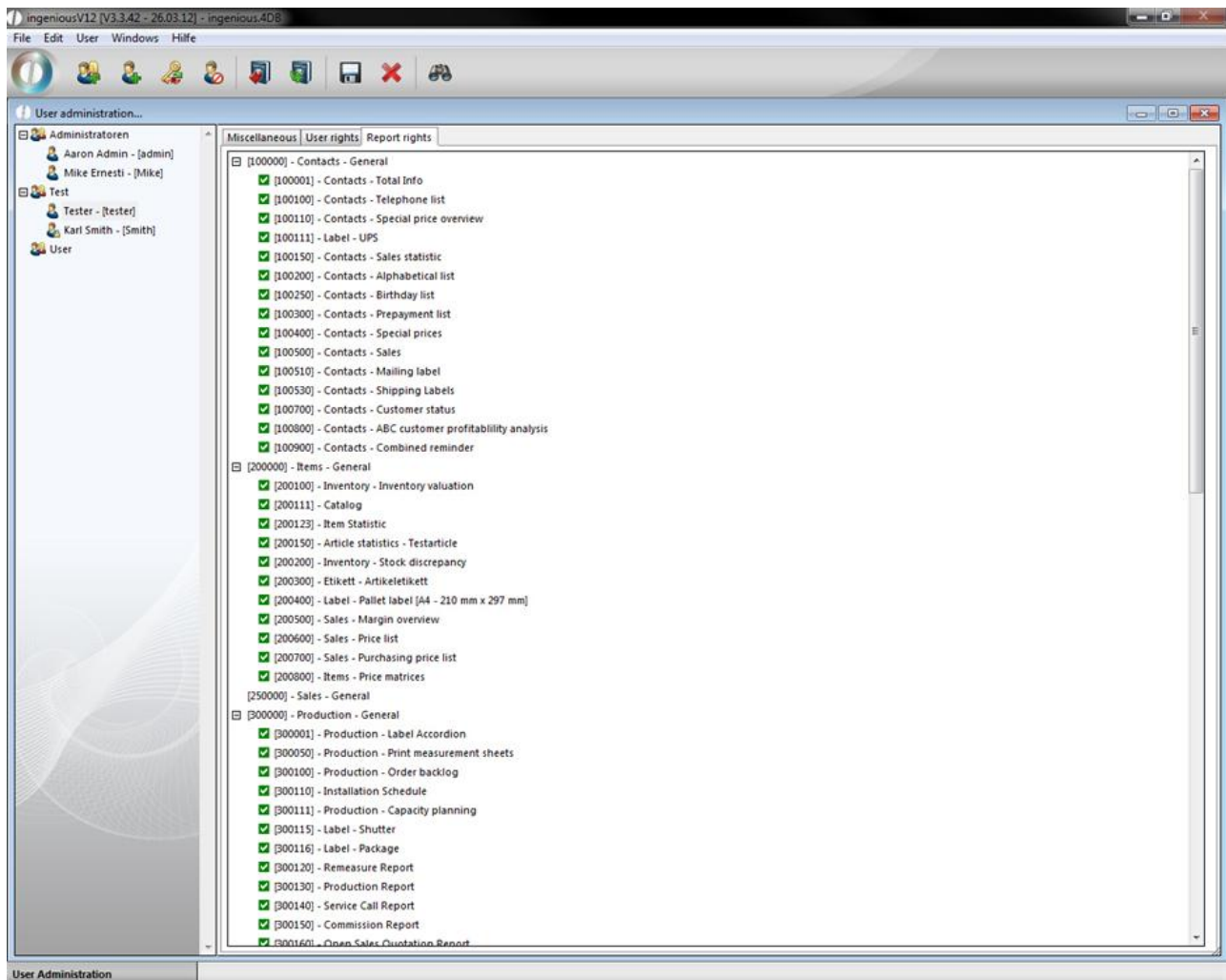


Error report when trying to delete a quotation

In this manner the administrator from Ingenious.V12 can give the user the rights that correspond to the field of his activities.

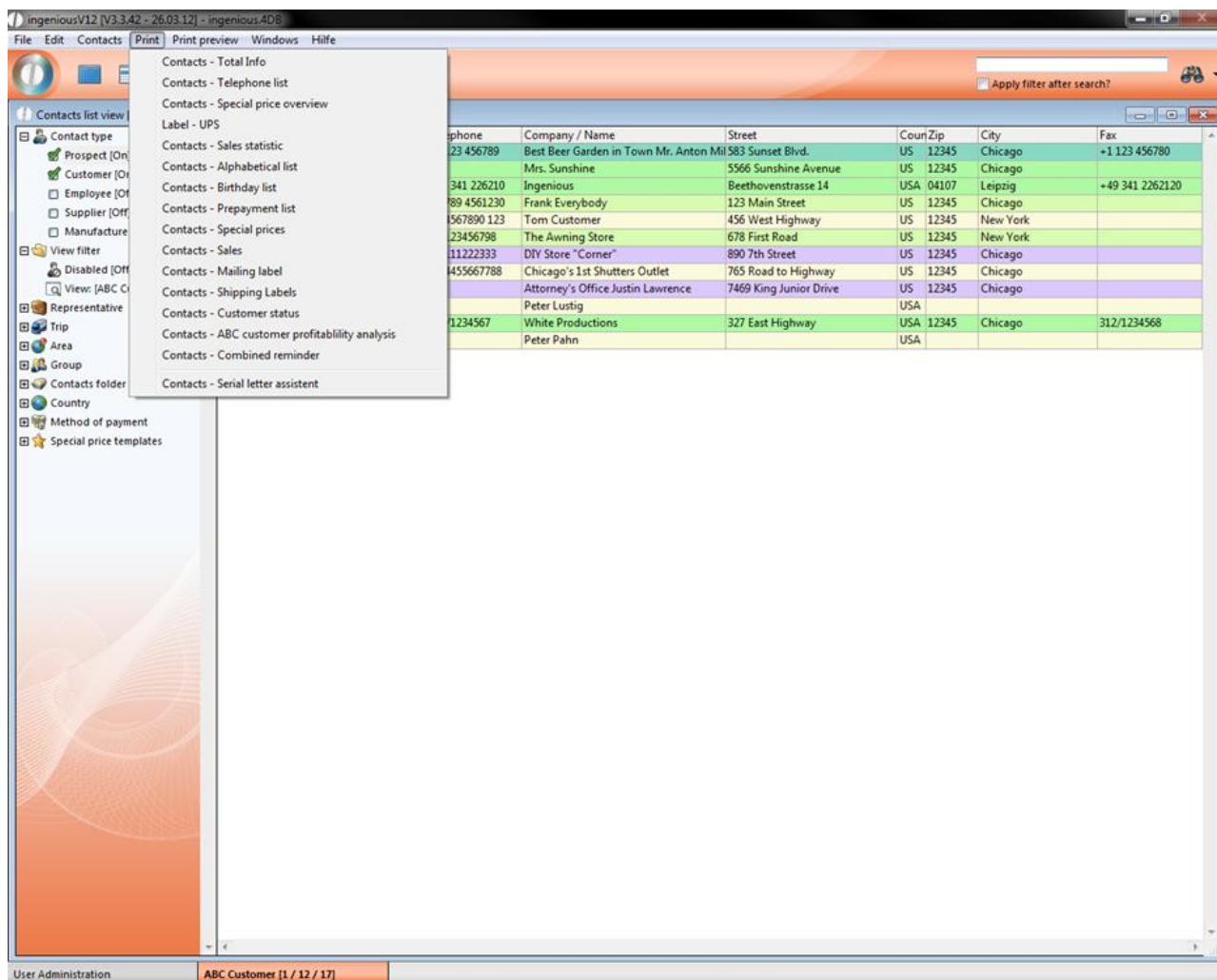
Report rights

The register card "Report Rights" contains all rights in which the information retrieval is exemplified in report format.




Register card "Report rights"

If one gives, for instance, a user all report rights for the "Contacts" module, the user can go back to all reports in this module.

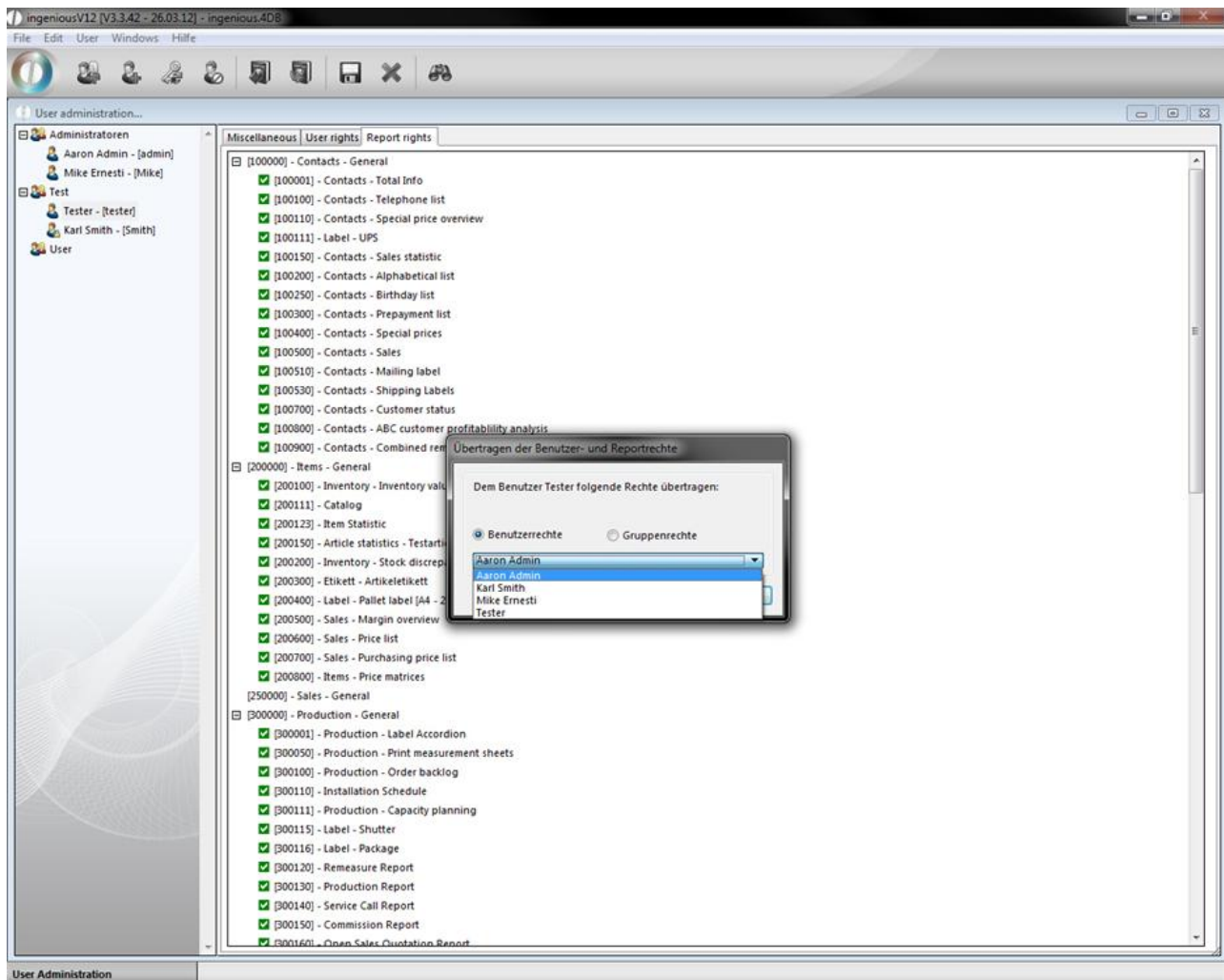


User possibilities

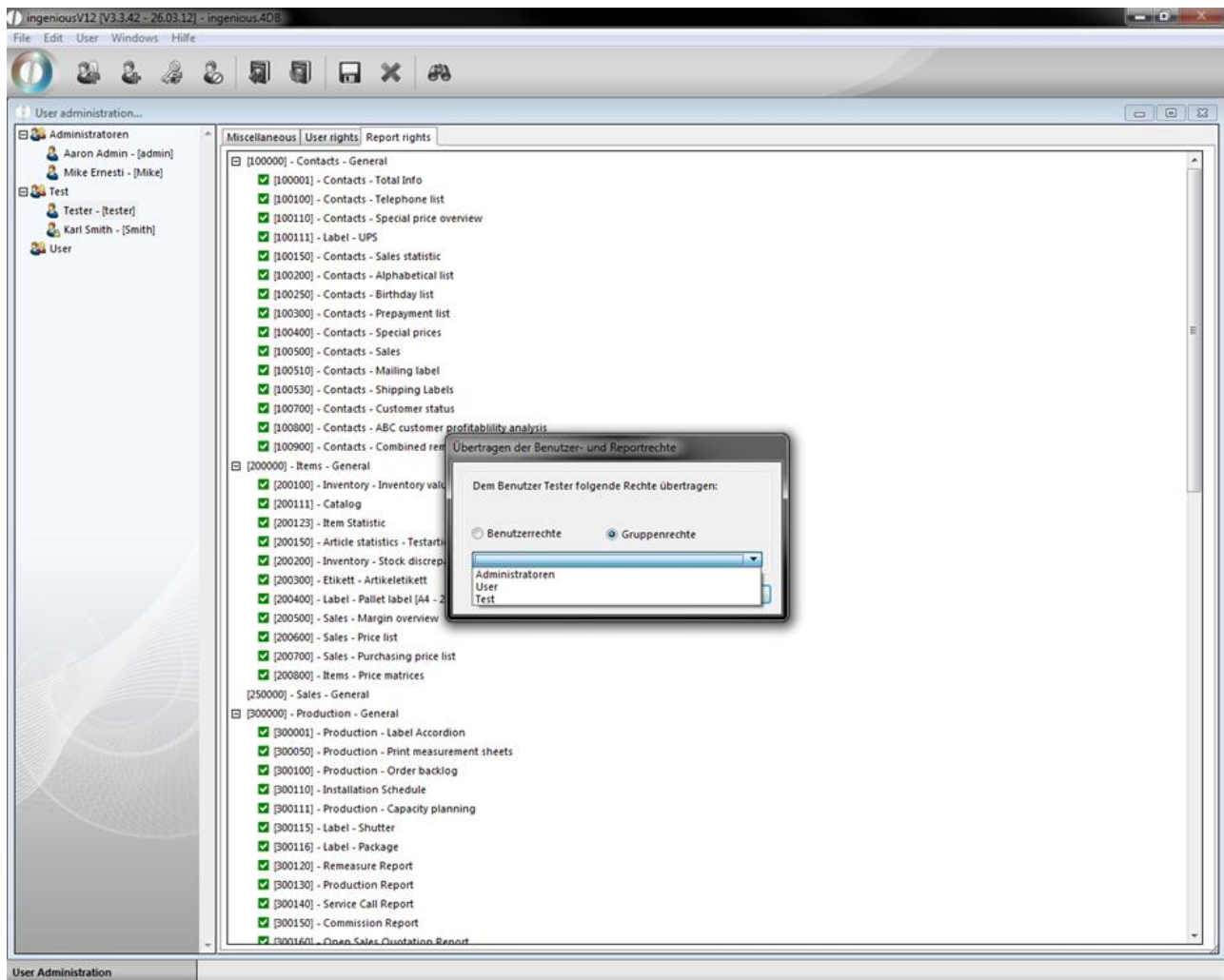
If one refuses some user rights to the user, then these print reports are no longer available (analog user rights).


It is possible to transfer report and user rights from one to another user. With a click on  you can transfer selected rights to another user.

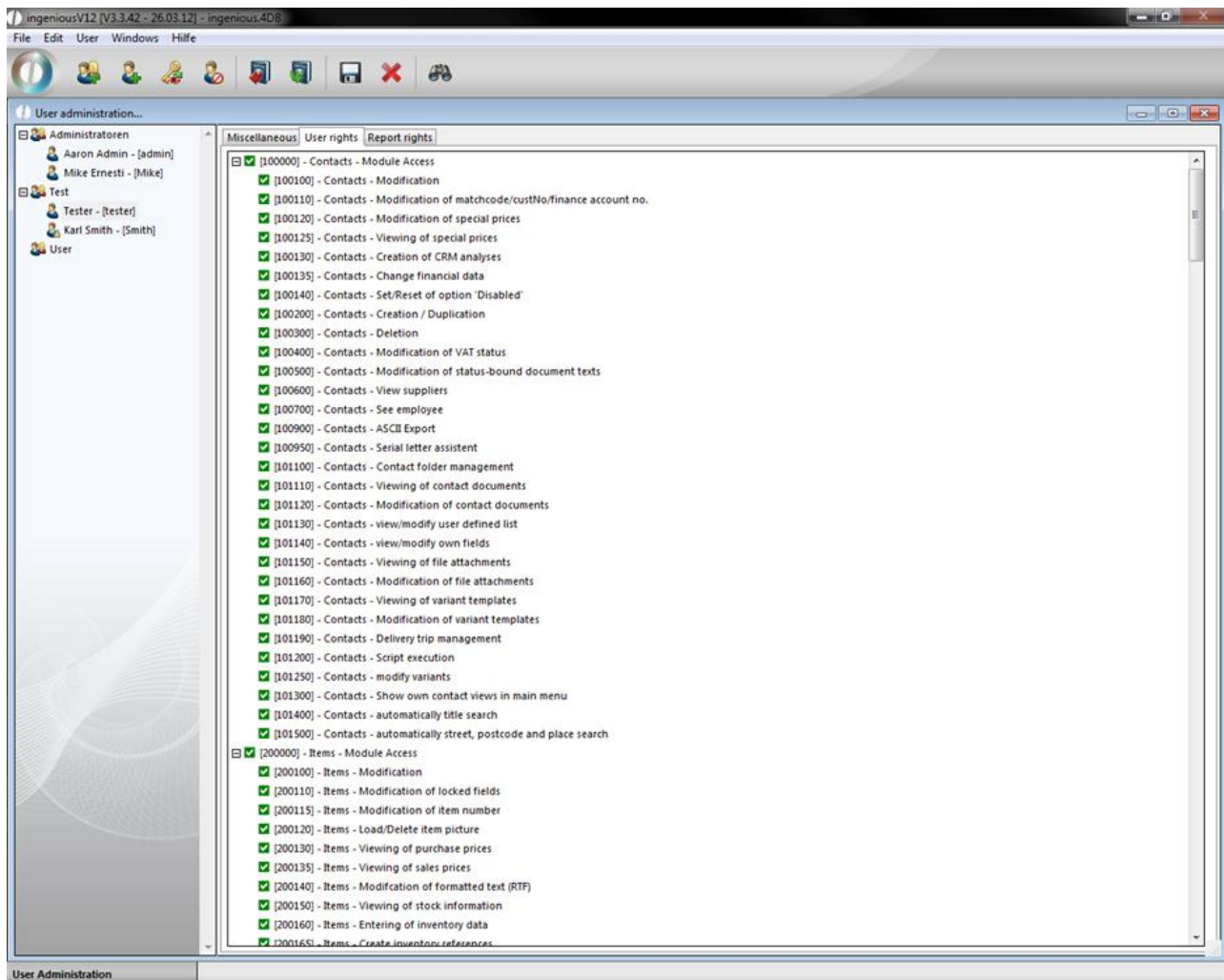
In the following example the user rights of "Aaron Admin" are transferred to "Tester"

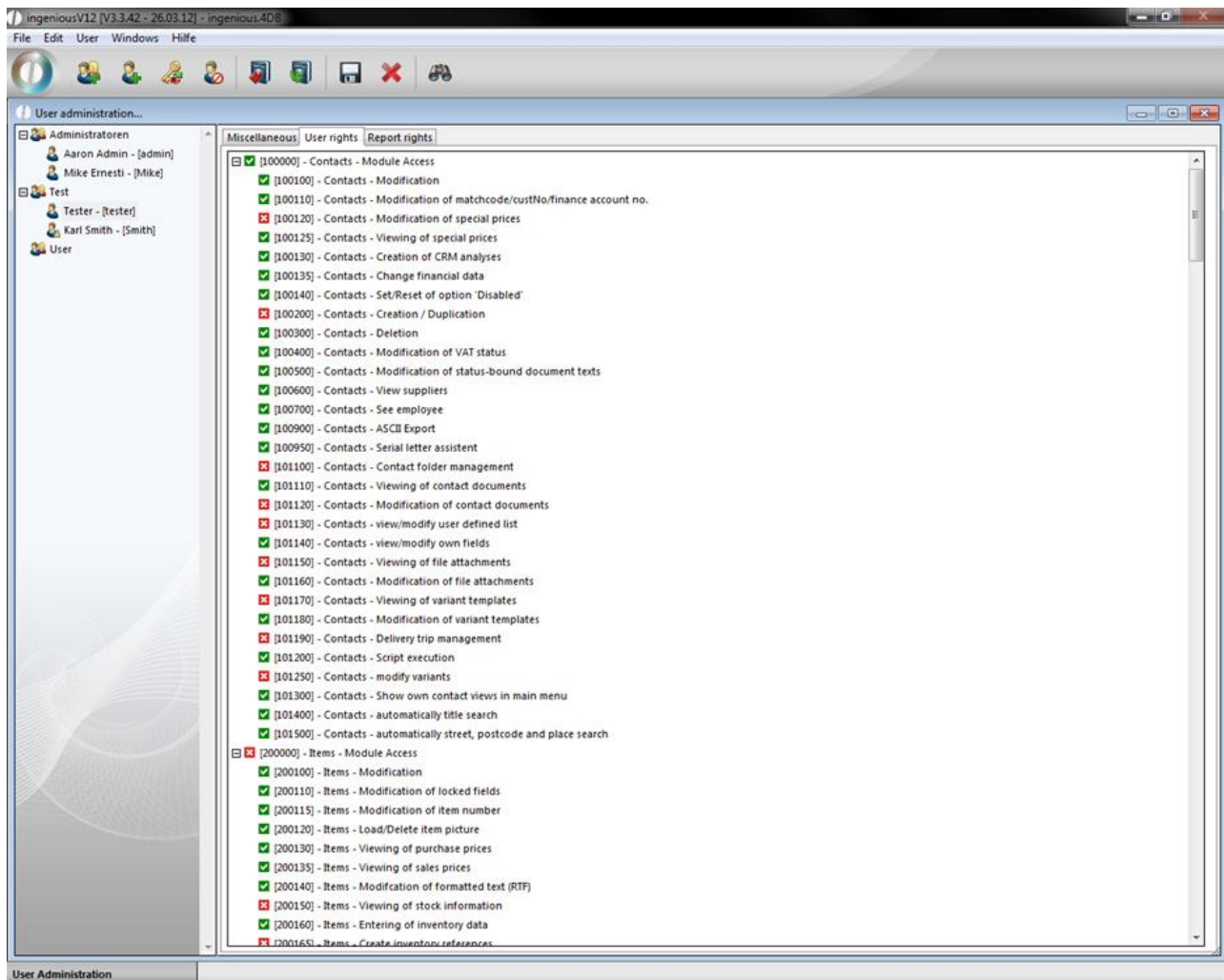


Also you can transfer rights of a group to a single person. To do so choose "group rights" in the window "Transfer user- and report rights".



You can reset user and group rights with a click on the icon . As a result the rights of the group the user belongs to are transferred to him.





7 Other modules

7.1 Inventory management

Here receipts of goods and issuing of goods, as well as inventory postings can be executed with the help of a barcode scanner. Here, incoming and outgoing, as well as inventory postings can be activated.



Inventory management consists of three register cards. With the register card "Inventory management", all inventory postings can be carried out centrally. You have the possibility to find the desired articles with the help of the search functions and to carry out the various postings. Only articles will be listed that activated the option "Automatic inventory management" in the column "Parameter" in the detail view. The located articles are displayed in red when the stock is under the established minimum. When you click on an article, the corresponding information will be displayed in the lower part of the register card.

ingeniousV12 [V3.3.41 - 26.03.12] - C:\Users\mkonrad\INGENIOUS\Documents\4th Dimension\2012.02.20_ingenious Doku\English\ingenious_Outerware\ingenious.4DC

File Edit Print Print preview Windows Hilfe

Manage item stock [262/3887]

Inventory Management Inventory Documents Inventory postings Barcode Scanner

Matchcode	Item number	delivery tin	Minimum	Ordered	Reserved	Stock	Inventory	PP \$ / Unit	PP \$	Last inventory
Group Control System FL	165102-00	0.000	0.000	0.000	0.000	1.000		230.00 / Piece		3/13/2012 - 11:50:35
DC Motor for Battery Back-up System FL	164008-00	0.000	0.000	0.000	0.000	1.000		483.00 / Piece		3/13/2012 - 10:55:38
1:11 Record Gear FL	143001-00	0.000	7.000	0.000	0.000	5.000		11.81 / Piece		3/13/2012 - 16:12:54
Wind & Sun Control - Soliris FL	164044-00	0.000	0.000	0.000	0.000	2.000		57.50 / Piece		3/13/2012 - 11:51:21
T-Strap easy-click	154008-00	0.000	1.500.000	0.000	0.000	-49.000		0.91 / PC		
Hilti HSL-3 Expansion anchor 24mm x 100mm	442131-00	0.000	0.000	0.000	0.000	1.000		115.00 / box100		3/13/2012 - 11:38:05
T01		0.000	0.000	0.000	0.000	-3.030.000		10.00 / PC		4/25/2012 - 13:54:33
1 Cha. Remote Wall Mount Transmitter - cream	100100-10	3.000	2.000	0.000	0.000	1.000		7.60 / PC		
1_2 Channel	2005914	0.000	5.000	0.000	0.000	2.000		27.50 / PC		3/12/2012 - 15:34:25
HV Blade no.3 16.5ft bronze	345302-09	0.000	0.000	0.000	0.000	74.000		1.17 / ft		3/14/2012 - 00:00:00
HV Blade no.3 16.5ft beige	345302-03	0.000	0.000	0.000	0.000	97.000		1.17 / ft		3/14/2012 - 00:00:00
HV #3 Long Screw DE	343003-00	0.000	0.000	0.000	0.000	5.000		0.13 / PC		3/13/2012 - 16:01:04
HV #3 Long Screw FL	343003-00	0.000	500.000	2.000.000	0.000	-264.000		0.13 / PC		
HV Blade no.3 16.5ft beige 1 (single)	345003-03-1	0.000	0.000	0.000	0.000	71.000		0.00 / ft		3/14/2012 - 00:00:00
HV Blade no.3 16.5ft beige 10Pack	345003-03-10	0.000	0.000	0.000	0.000	72.000		0.00 / ft		3/14/2012 - 00:00:00
HV Blade no.3 16.5ft beige FL	345302-03	0.000	0.000	0.000	0.000	73.000		1.17 / ft		3/14/2012 - 00:00:00
Tape_Grey	7718-TAPE-07	0.000	100.000	0.000	0.000	200.000		0.00 / m		3/12/2012 - 15:42:19

Product information

Matchcode: Group Control System FL ArtNo: 165102-00 Barcode:

Long text: Group Control System

Inventory posting

Posting: Inventory posting Quantity: [X cm] [Y cm] [Z cm] Min stock:

Reference: Date: 05/03/12 PP Unit: 0.00 PP Total: 0.00 Lead time:

Undo Save Quit

In the "Inventory posting" area, you can select acquisitions, outflow and inventory postings, you can enter a reference and you can determine the amount and the posting date. In the "PP Unit" field, you can enter unit prices of the article. In the "PP Total" field, the total price will be calculated after the entry. Important: you must be careful that the selected settings are made with the enter key and **not** with the "Save" button. With this button, all postings will be automatically saved in the database. With the enter key, you will have a preliminary view of the posting status which can be changed by using the "Back" button. Modified articles and/or edited articles appear in bold font in the list.

Via the register „Inventory posting“ you could search systematic for stock posted articles and let them be displayed.

ingenious.V12 [V3.3.41 - 26.03.12] - C:\Users\mkonrad\INGENIOUS\Documents\4th Dimension\2012.02.20_ingenious Doku\English\ingenious_Outerware\ingenious.4DC


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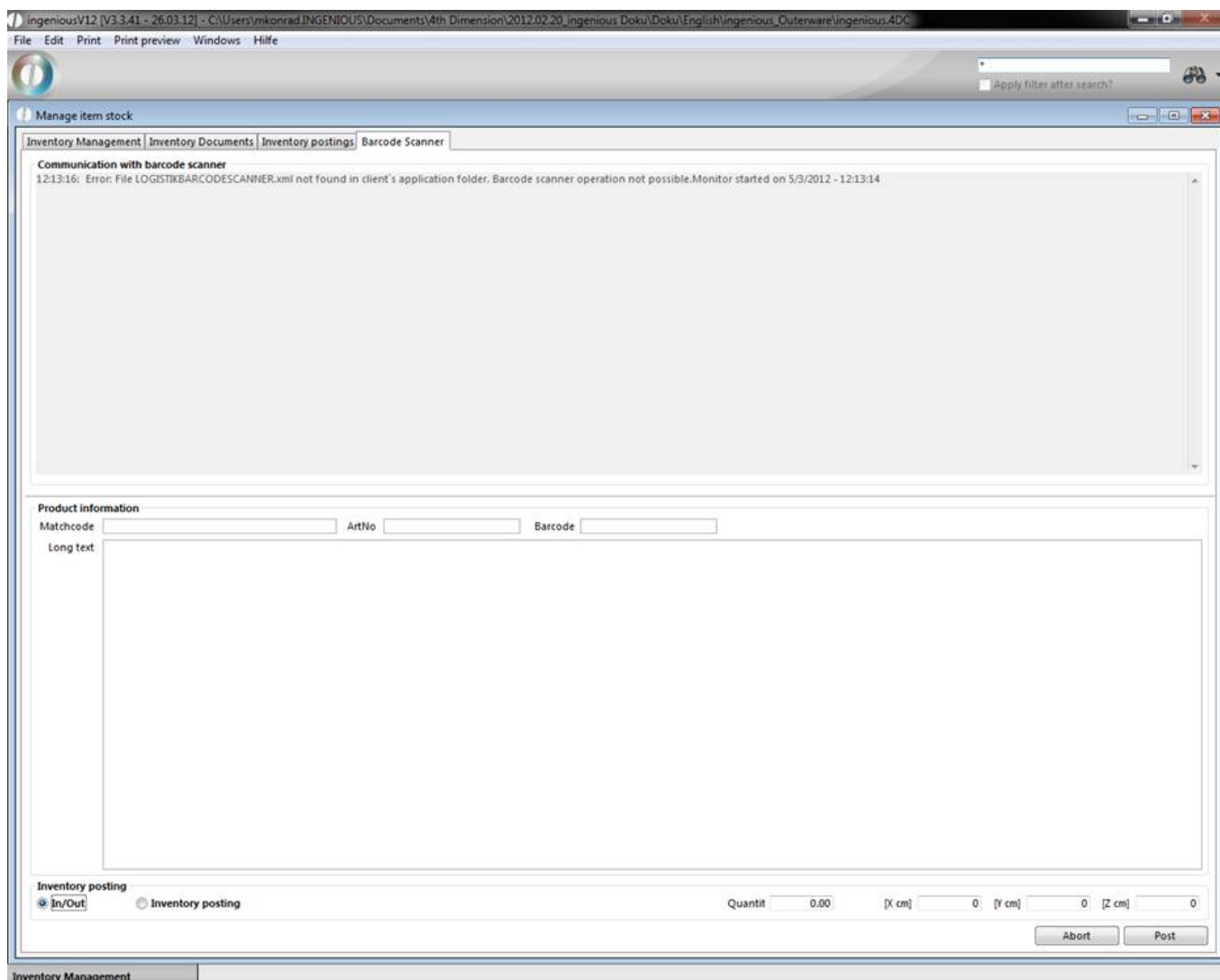
Summarisation
Single Position From 01/02/12 Till 05/03/12 Apply filter after search?

Manage item stock [1108]

Items	Booking type	Project	Reference	Receipt number	Quantity	x [cm]	y [cm]	z [cm]	Total	Unit	Stock	PP	Date
SIDE CAP 7.0 BK -	Consumption	03082012/00047			4.000	0.000	0.000	0.000	4.000	pair	-4.000	17.75 \$	3/13/2012 - 16:45:26 - admin
AL Baseslat Mini w/	Consumption	03082012/00047			4.000	64.750	0.000	0.000	21.583	ft	-21.580	0.60 \$	3/13/2012 - 16:45:26 - admin
AL TB BOXC 7.0/9/	Consumption	03082012/00047			4.000	67.500	0.000	0.000	24.750	ft	-24.750	3.09 \$	3/13/2012 - 16:45:26 - admin
AL FB BOXC 7.0/9/	Consumption	03082012/00047			4.000	67.500	0.000	0.000	24.750	ft	-24.750	4.34 \$	3/13/2012 - 16:45:26 - admin
PVC Cap 60mm	Consumption	04022012/00068			20.000	0.000	0.000	0.000	20.000	PC	-30.000	2.35 \$	4/2/2012 - 10:34:40 - admin
PVC Cap 60mm	Consumption	04022012/00068			10.000	0.000	0.000	0.000	10.000	PC	-30.000	2.35 \$	4/2/2012 - 10:34:40 - admin
Tube ST 40mm/0.4	Consumption	04232012/00071			1.000	47.500	0.000	0.000	3.958	ft	-40.380	1.27 \$	4/25/2012 - 13:56:09 - admin
Tube ST 40mm/0.4	Consumption	04022012/00068			10.000	17.500	0.000	0.000	14.583	ft	-40.380	1.26 \$	4/2/2012 - 10:34:40 - admin
Tube ST 40mm/0.4	Consumption	03082012/00047			4.000	65.500	0.000	0.000	21.833	ft	-40.380	1.10 \$	3/13/2012 - 16:45:26 - admin
Tube ST 60mm/0.4	Consumption	04022012/00068			20.000	16.500	0.000	0.000	27.500	ft	-32.920	1.78 \$	4/2/2012 - 10:34:40 - admin
Tube ST 60mm/0.4	Consumption	04022012/00068			10.000	6.500	0.000	0.000	5.417	ft	-32.920	1.77 \$	4/2/2012 - 10:34:40 - admin
AL Rail Maxi 63/27	Consumption	03082012/00047			8.000	61.000	0.000	0.000	40.667	ft	-40.670	1.90 \$	3/13/2012 - 16:45:26 - admin
Recoil Box Mini w/	Consumption	03082012/00047			4.000	0.000	0.000	0.000	4.000	PC	-4.000	6.50 \$	3/13/2012 - 16:45:26 - admin
Mini Plastic Pulley	Consumption	03082012/00047			8.000	0.000	0.000	0.000	8.000	PC	-8.000	1.00 \$	3/13/2012 - 16:45:26 - admin
Gear Insert for 40m	Consumption	04022012/00068			10.000	0.000	0.000	0.000	10.000	PC	-10.000	1.96 \$	4/2/2012 - 10:34:40 - admin
6.8 2 inch Build Qx	Inventory posting	3/12/2012 - 16:21:36 - admin			1.000	12.000	0.000	0.000	1.000	ft	1.000	0.00 \$	3/12/2012 - 16:21:36 - admin
Plug Buttons Whit	Consumption	04232012/00071			2.000	0.000	0.000	0.000	2.000	PC	-290.000	0.10 \$	4/25/2012 - 13:56:09 - admin
Plug Buttons Whit	Consumption	04022012/00068			60.000	0.000	0.000	0.000	60.000	PC	-290.000	0.10 \$	4/2/2012 - 10:34:40 - admin
Plug Buttons Whit	Consumption	04022012/00068			120.000	0.000	0.000	0.000	120.000	PC	-290.000	0.10 \$	4/2/2012 - 10:34:40 - admin
Plug Buttons Whit	Consumption	04022012/00068			60.000	0.000	0.000	0.000	60.000	PC	-290.000	0.10 \$	4/2/2012 - 10:34:40 - admin
Plug Buttons Whit	Consumption	03082012/00047			48.000	0.000	0.000	0.000	48.000	PC	-290.000	0.09 \$	3/13/2012 - 16:45:26 - admin
Ball Bearing 28mm	Consumption	04232012/00071			2.000	0.000	0.000	0.000	2.000	PC	-60.000	1.05 \$	4/25/2012 - 13:56:09 - admin
Ball Bearing 28mm	Consumption	04022012/00068			20.000	0.000	0.000	0.000	20.000	PC	-60.000	1.05 \$	4/2/2012 - 10:34:40 - admin
Ball Bearing 28mm	Consumption	04022012/00068			20.000	0.000	0.000	0.000	20.000	PC	-60.000	1.05 \$	4/2/2012 - 10:34:40 - admin
Ball Bearing 28mm	Consumption	04022012/00068			10.000	0.000	0.000	0.000	10.000	PC	-60.000	1.05 \$	4/2/2012 - 10:34:40 - admin
Ball Bearing 28mm	Consumption	03082012/00047			8.000	0.000	0.000	0.000	8.000	PC	-60.000	0.91 \$	3/13/2012 - 16:45:26 - admin
Entry Guides Mini	Consumption	03082012/00047			4.000	0.000	0.000	0.000	4.000	pair	-4.000	1.82 \$	3/13/2012 - 16:45:26 - admin
PVC Slat Maxie W/	Consumption	04262012/00072			5.000	32.000	0.000	0.000	14.667	ft	54.330	0.51 \$	4/26/2012 - 10:14:29 - admin
PVC Slat Maxie W/	Consumption	04262012/00072			6.000	20.000	0.000	0.000	11.000	ft	54.330	0.52 \$	4/26/2012 - 10:14:29 - admin
PVC Slat Maxie W/	Inventory posting	4/26/2012 - 10:13:03 - admin			80.000	12.000	0.000	0.000	80.000	ft	54.330	0.00 \$	4/26/2012 - 10:13:03 - admin
HD CEILING HEAD	Consumption	No such project			1.000	56.000	0.000	0.000	5.040	ft	-0.040	2.50 \$	3/13/2012 - 15:44:40 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - 15:25:14 - admin			5.000	12.000	0.000	0.000	5.000	ft	-0.040	0.00 \$	3/13/2012 - 15:25:14 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			1.000	240.000	0.000	0.000	20.000	ft	-0.040	0.00 \$	3/14/2012 - 16:27:39 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			5.000	240.000	0.000	0.000	100.000	ft	-0.040	0.00 \$	3/13/2012 - 15:44:26 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			20.000	12.000	0.000	0.000	20.000	ft	20.000	0.00 \$	3/14/2012 - 16:27:39 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			100.000	12.000	0.000	0.000	100.000	ft	20.000	0.00 \$	3/13/2012 - 15:44:26 - admin
HD CEILING HEAD	Consumption	No such project			1.000	56.000	0.000	0.000	5.040	ft	9.920	2.88 \$	3/14/2012 - 15:27:51 - admin
HD CEILING HEAD	Consumption	No such project			1.000	56.000	0.000	0.000	5.040	ft	9.920	2.88 \$	3/14/2012 - 15:27:51 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			20.000	12.000	0.000	0.000	20.000	ft	9.920	0.00 \$	3/14/2012 - 16:27:39 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			100.000	12.000	0.000	0.000	100.000	ft	9.920	0.00 \$	3/13/2012 - 15:44:26 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			20.000	12.000	0.000	0.000	20.000	ft	20.000	0.00 \$	3/14/2012 - 16:27:39 - admin
HD CEILING HEAD	Inventory posting	3/13/2012 - admin			100.000	12.000	0.000	0.000	100.000	ft	20.000	0.00 \$	3/13/2012 - 15:44:26 - admin
HD 3/8 inch BUILD	Inventory posting	3/13/2012 - 11:39:13 - admin			2.000	12.000	0.000	0.000	2.000	ft	2.000	0.00 \$	3/13/2012 - 11:39:13 - admin
HV Blade no.1 14.5	Inventory posting	3/14/2012 - admin			100.000	12.000	0.000	0.000	100.000	ft	100.000	0.00 \$	3/14/2012 - 10:48:32 - admin

Inventory Management

In the "Barcode scanner" register card, a dialog with the bar code scanner will be displayed. You also can select a desired article with  from the catalog. In the lower part of the register card you can manage the scanned articles in stock.



In order to determine if a posting has been made, click in the "Article" module in the detail view of the article on the column "Inventory monitor", and the postings made will be displayed.

From version 2.4.6 a new barcode scanner module is included in ingenious.V12. With the module you can perform inventory postings with a web browser running on a barcode scanner.

In the browser you have to go to the following web site: [http://\[Webserver_IP\]:\[Port\]/BCS/](http://[Webserver_IP]:[Port]/BCS/)

Then the login screen for the barcode scanner module will be displayed.



The login can be skipped, when you add the user and the password to the address: `http://[Webserver_IP]:[Port]/BCS/user=[user]&pass=[password]`

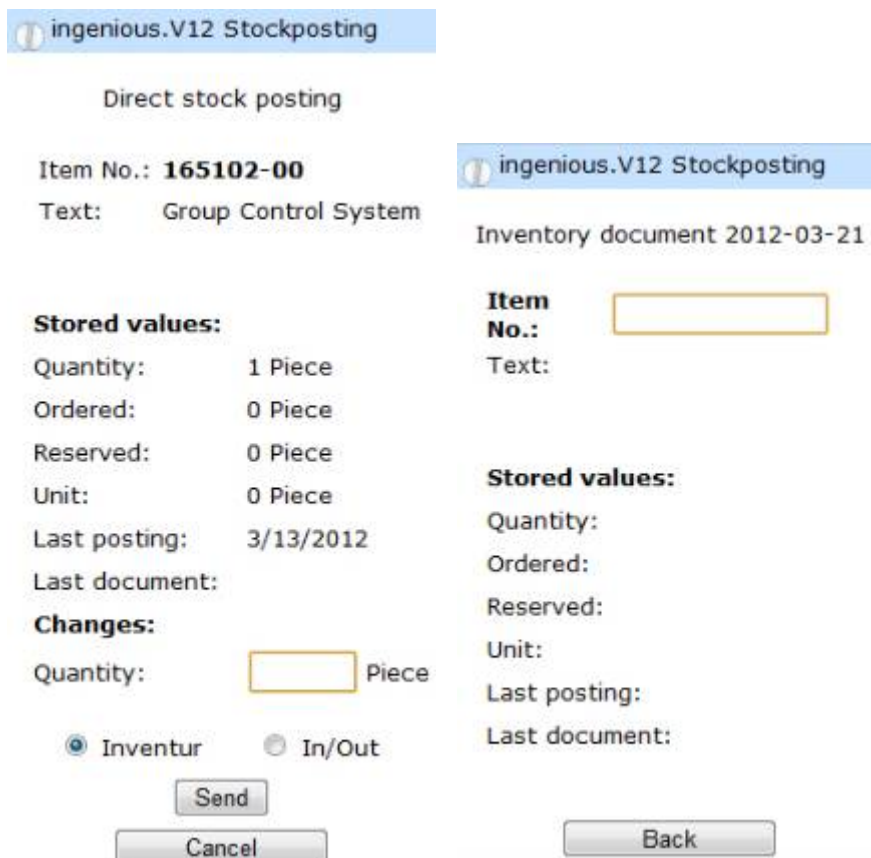
[Webserver_IP], [Port] have to be replaced according to the webserver preferences.

After the login an overview of postings will be displayed. That can be direct postings or not completed posting documents. When posting in documents, the postings will only be added to the document and can be posted in a collection after checking/correction.



The screenshot shows the 'ingenious.V12 Stockposting' login interface. It features a blue header bar with the title. Below the header, the text 'Select posting' is displayed. Underneath, there is a blue link labeled 'directly'. Below that, the text 'by Document:' is shown, followed by a blue link labeled '2012-03-21'. At the bottom of the form is a 'Logout' button.

In the following form item numbers can be scanned as barcodes or can be entered directly. The item will be searched in the database and according to the result an error message or the item information will be displayed: item number, item description, quantity, minimum stock level, delivery time and if available the total of the posting in the document. Inputs for the stock posting are posting quantity, minimum stock level and delivery time. The posting quantity can be added to the current quantity, it also can be a correction of the last value, or you can override the current value (new posting). If there isn't any posting information in the document, the three selection buttons will not be displayed.



The screenshot displays the 'Direct stock posting' form. It has a blue header bar with the title. Below the header, the text 'Direct stock posting' is shown. The form is divided into two main sections. The left section contains the following fields: 'Item No.: 165102-00', 'Text: Group Control System', 'Stored values:' (with sub-fields: Quantity: 1 Piece, Ordered: 0 Piece, Reserved: 0 Piece, Unit: 0 Piece, Last posting: 3/13/2012, Last document:), 'Changes:' (with a sub-field: Quantity: [input box] Piece), and radio buttons for 'Inventur' (selected) and 'In/Out'. The right section contains the following fields: 'Item No.: [input box]', 'Text:', 'Stored values:' (with sub-fields: Quantity:, Ordered:, Reserved:, Unit:, Last posting:, Last document:), and buttons for 'Send', 'Cancel', and 'Back'.

With direct postings a correction of the last posting is not possible; in return you can post goods in and out.

ingenious.V12 Stockposting

Direct stock posting

Item No.: **165102-00**
Text: Group Control System

Stored values:
Quantity: 1 Piece
Ordered: 0 Piece
Reserved: 0 Piece
Unit: 0 Piece
Last posting: 3/13/2012
Last document:

Changes:
Quantity: Piece

☒ Inventur ☐ In/Out

You can reduce the information on the web site to provide a better presentation on the scanner. In the fullscreen view in the browser all fields are visible without scrolling.

ingenious.V12 Stockposting

Inventory document 2012-03-21

Item No.: **165102-00**
Text: Group Control System

Stored values:
Quantity: 1 Piece
Ordered: 0 Piece
Reserved: 0 Piece
Unit: 0 Piece
Last posting: 3/13/2012
Last document:

Changes:
Quantity: Piece

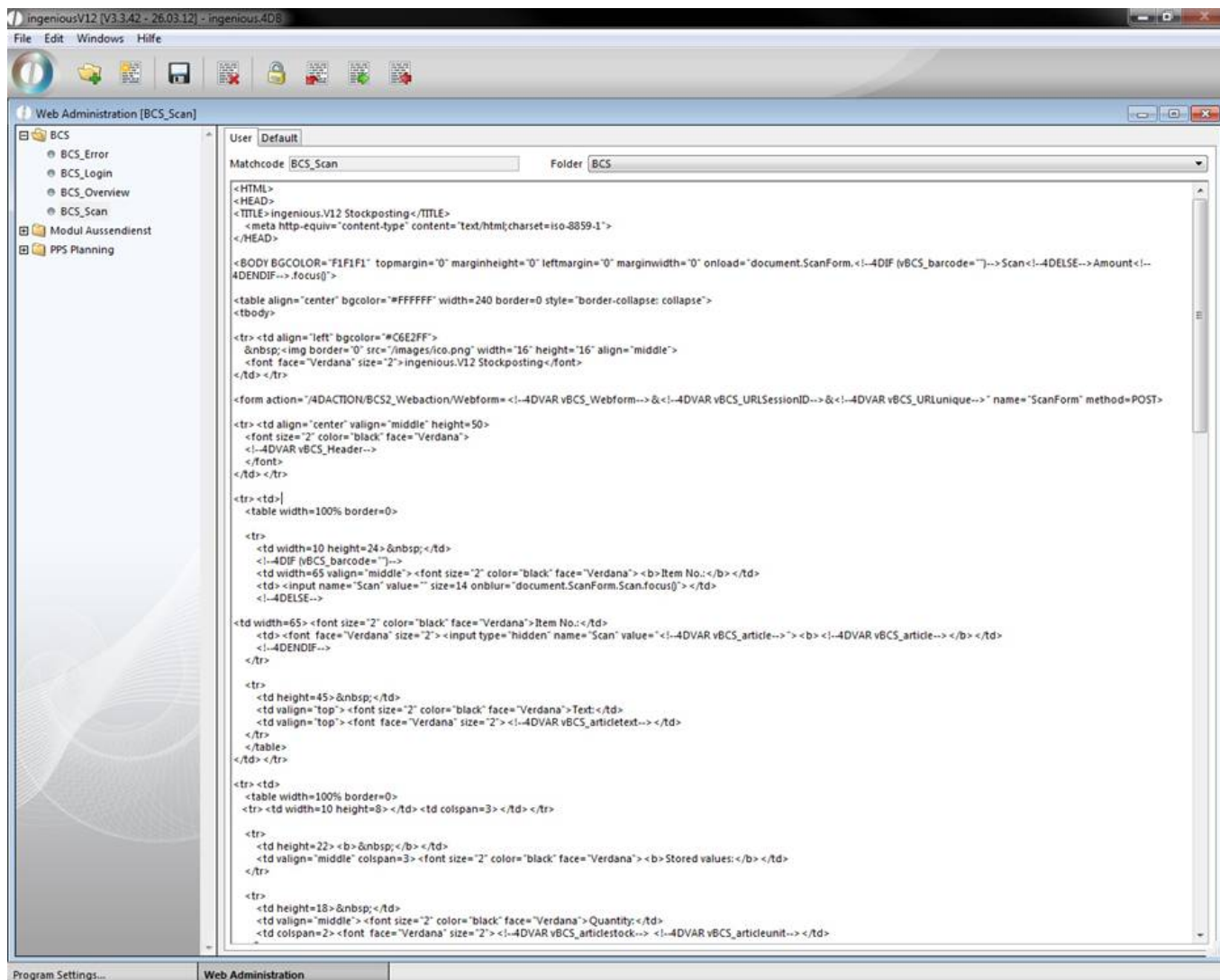
ingenious.V12 Stockposting

Inventory document 2012-03-21

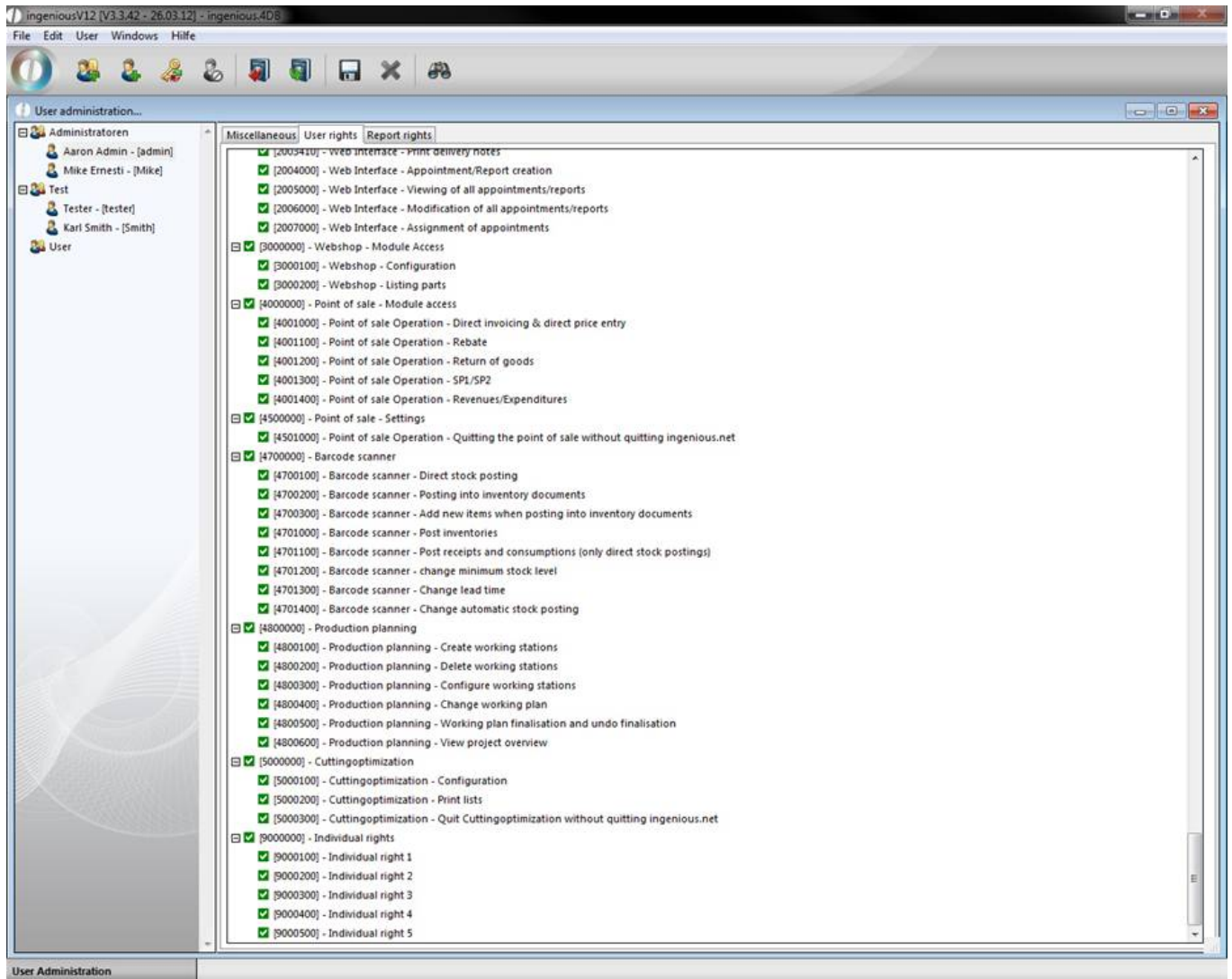
Item No.:
Text:

Stored values:
Quantity:
Ordered:
Reserved:
Unit:
Last posting:
Last document:

The web templates are deposit in the program settings in the category "Web server" and can be customized.



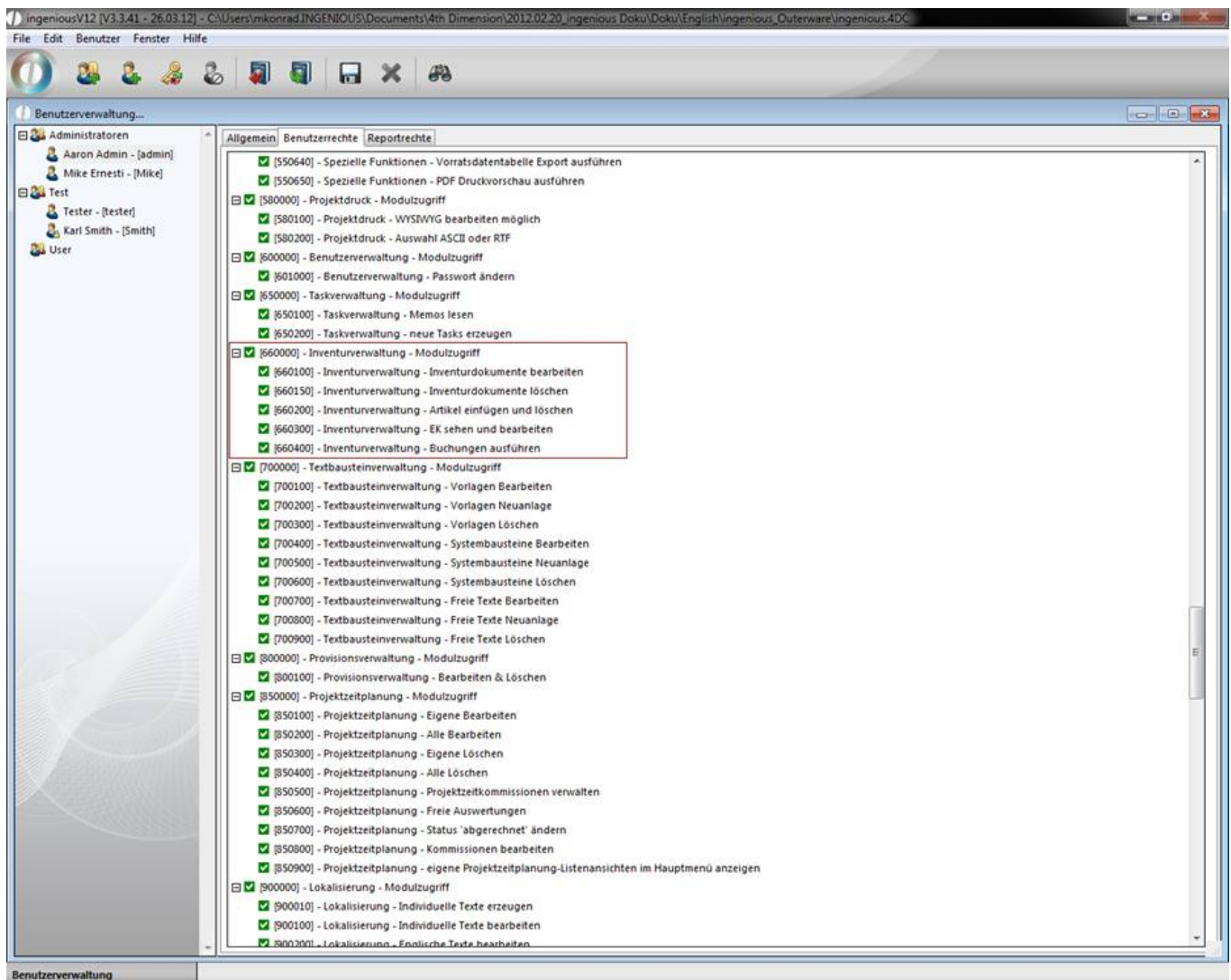
To use a barcode scanner a module license is necessary and user rights have to be enabled.



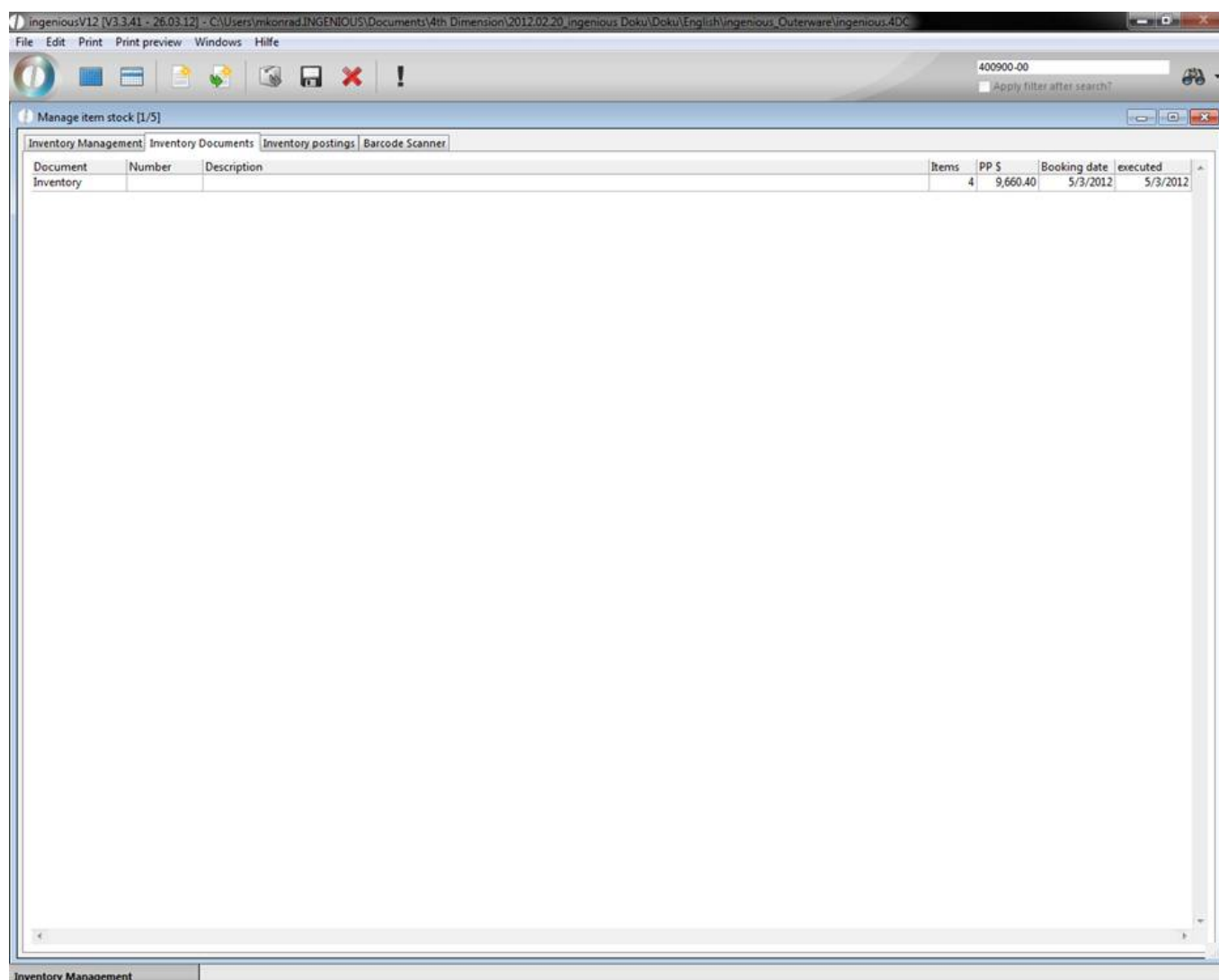
User right	Function
4700000	Allows the login of the user with the barcode scanner in the login dialog.
4700100 - 4700200	Regulates the access to the postings.
4700300	If enabled scanned items that are not available in the document will be created, otherwise only available items can be scanned.
4701000 - 4701300	Regulates which actions the user can perform with scanned items (inventory postings, stock moving, modify minimum stock level, change delivery time)

Inventory Management

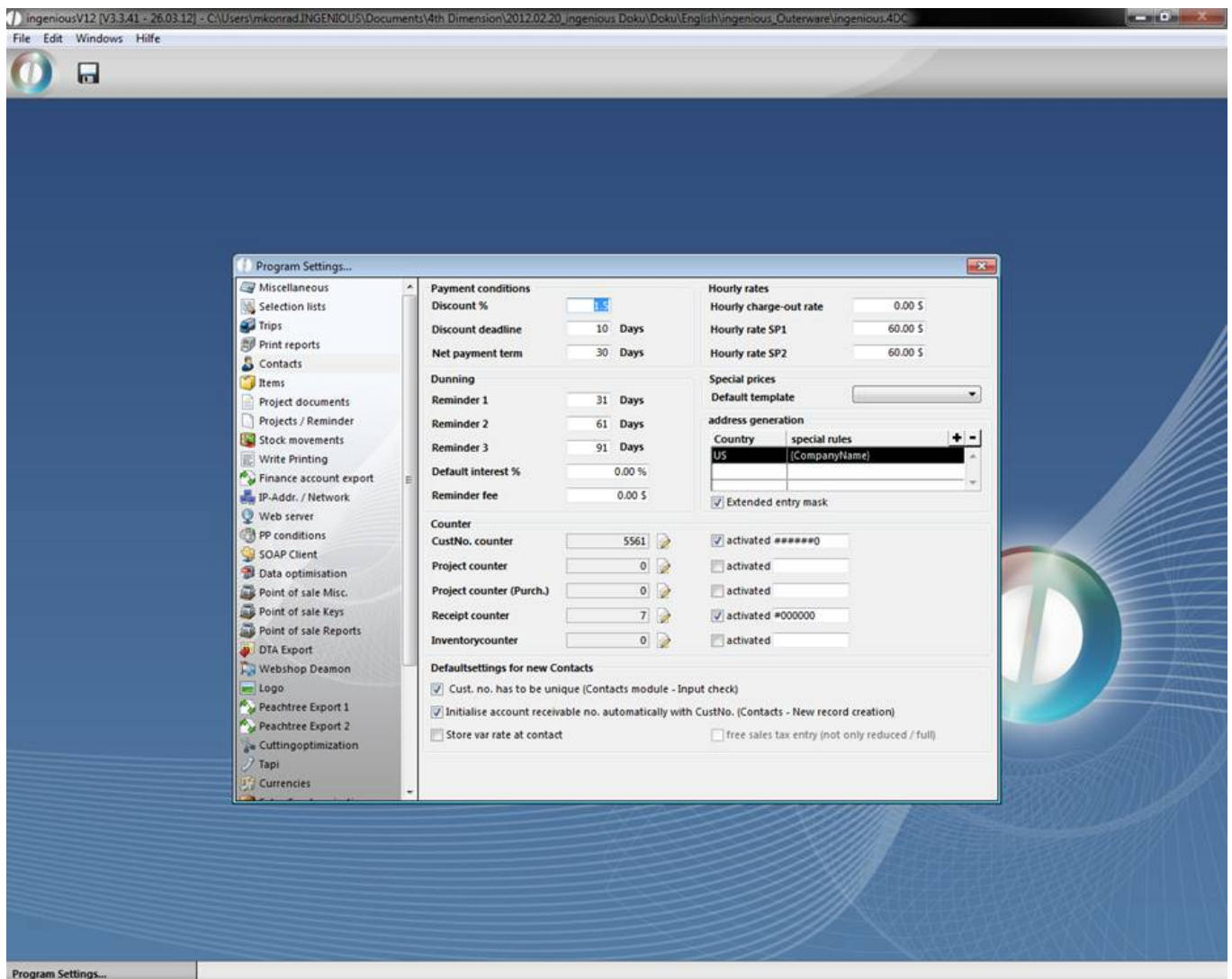
To be able to use the "Inventory Management" the corresponding user rights have to be enabled.





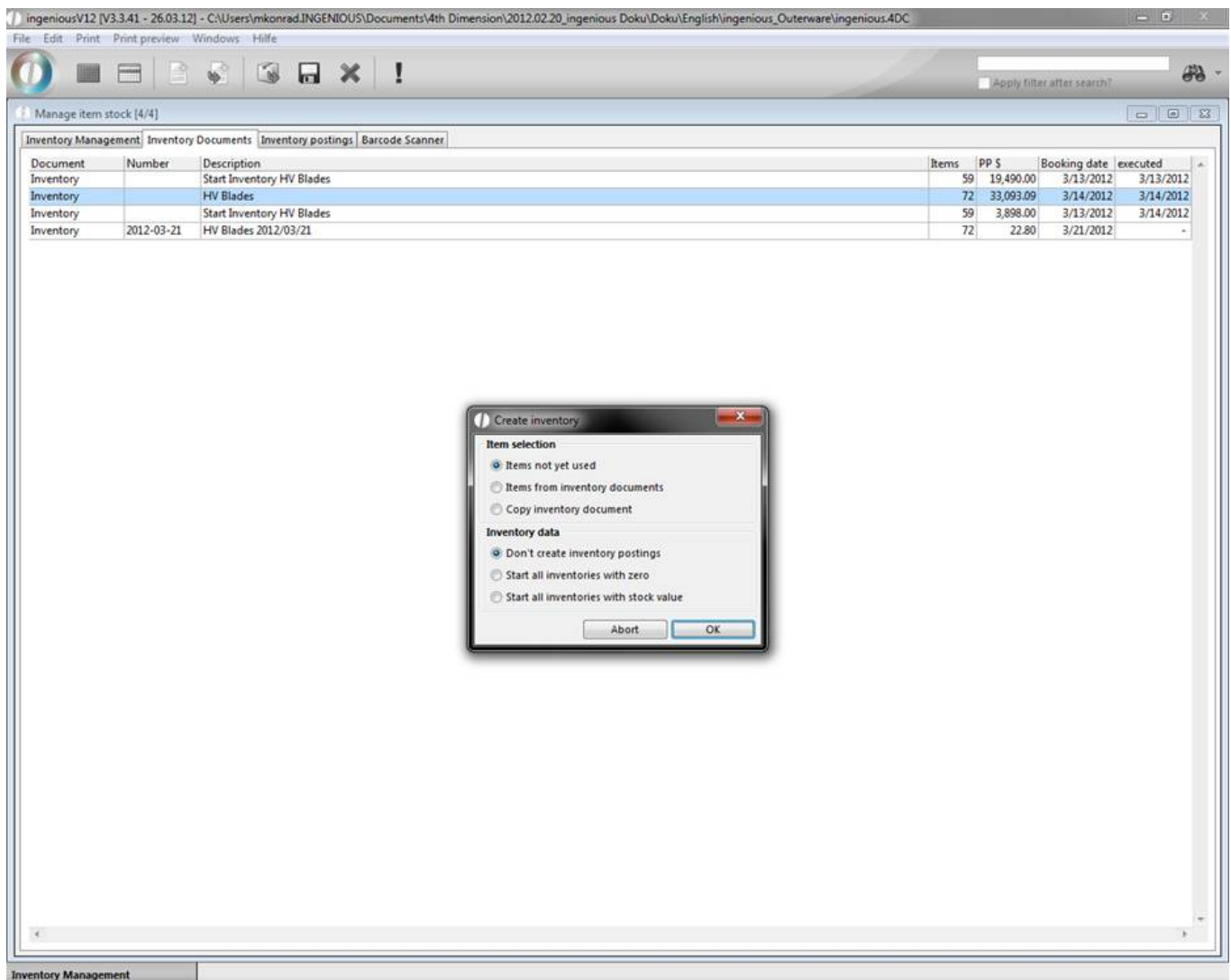
Now the inventory document appears as another tab of the menu entry inventory management.



To clearly identify the inventory documents a additional counter was added that you can find in the category "Contacts" in the program settings, that you can activate by enabling the field "Inventory counter".





With the button  you can add a new inventory document and define manually, which items you want to add in the inventory. With the button  ingenious.V12 creates a document automatically. In the displayed window you can define, which items should be regarded and what should happen to the existing inventory information.

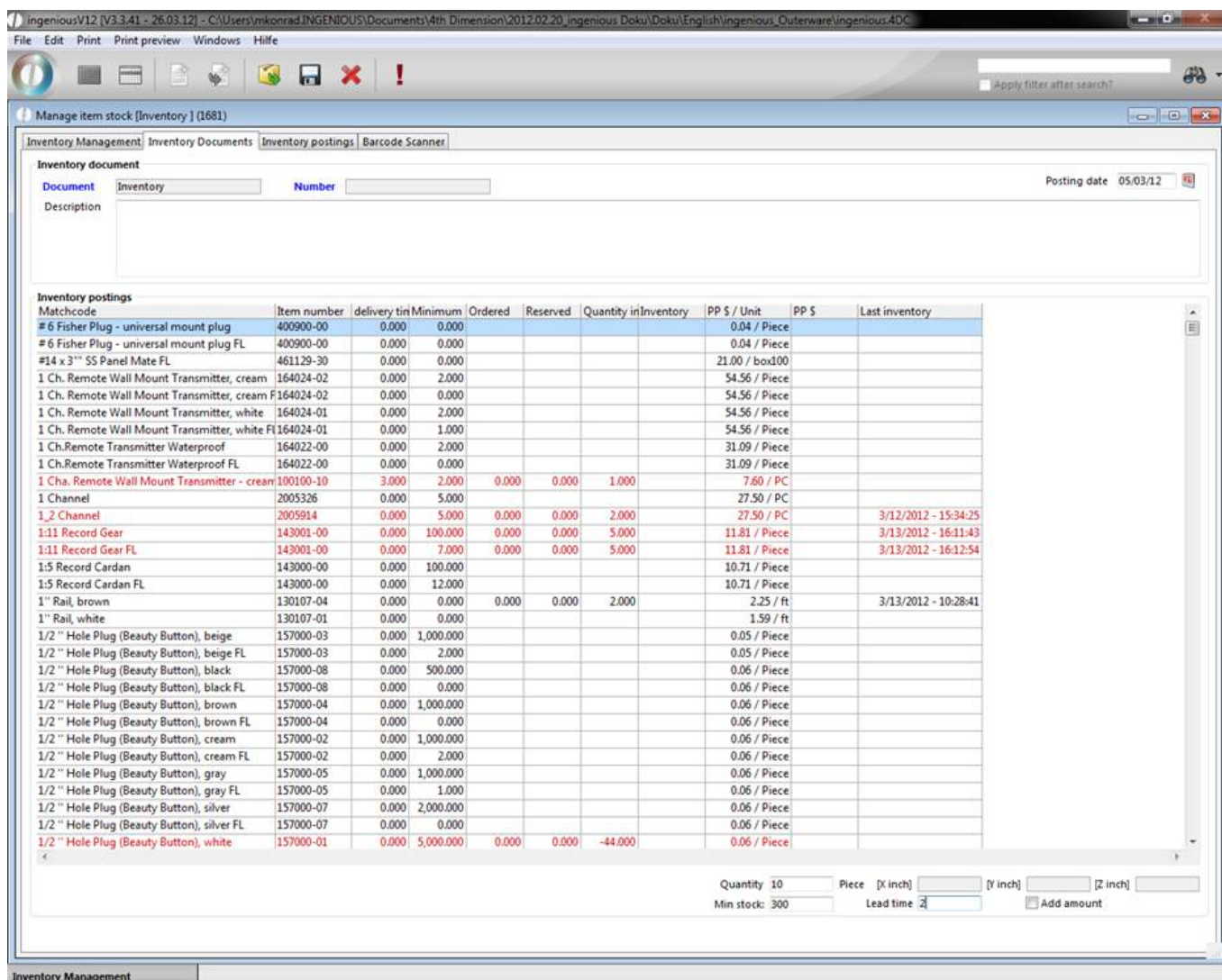



If you set the desired configuration a listing of all stock posted items will be displayed.

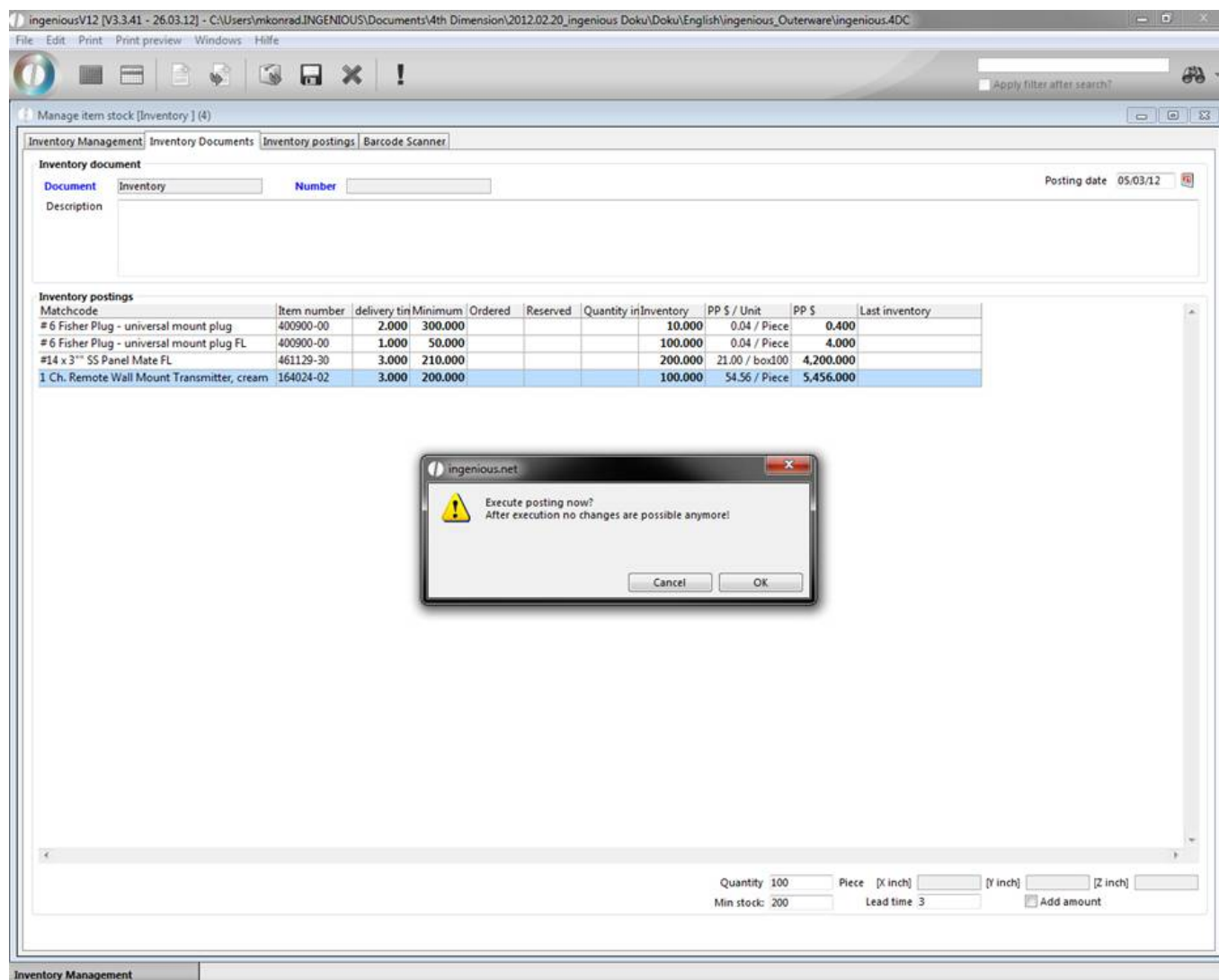
The screenshot shows the 'Manage item stock' window in the ingenious.V12 software. The window has a menu bar (File, Edit, Print, Print preview, Windows, Hilfe) and a toolbar. Below the menu bar, there are tabs for 'Inventory Management', 'Inventory Documents', 'Inventory postings', and 'Barcode Scanner'. The 'Inventory document' section shows a 'Document' type of 'Inventory' and a 'Posting date' of '05/03/12'. The main area displays a table of 'Inventory postings' with the following columns: Matchcode, Item number, delivery tin, Minimum, Ordered, Reserved, Quantity in Inventory, PP \$ / Unit, PP \$, and Last inventory. The table lists various items, including Fisher Plug, Remote Wall Mount Transmitter, Channel, Record Gear, Record Cardan, Rail, and Hole Plug. Several items are highlighted in red, indicating they have a quantity smaller than the defined minimum stock level. The bottom section of the window contains input fields for 'Quantity', 'Min stock', 'Lead time', and 'Add amount', along with checkboxes for 'X inch', 'Y inch', and 'Z inch'.

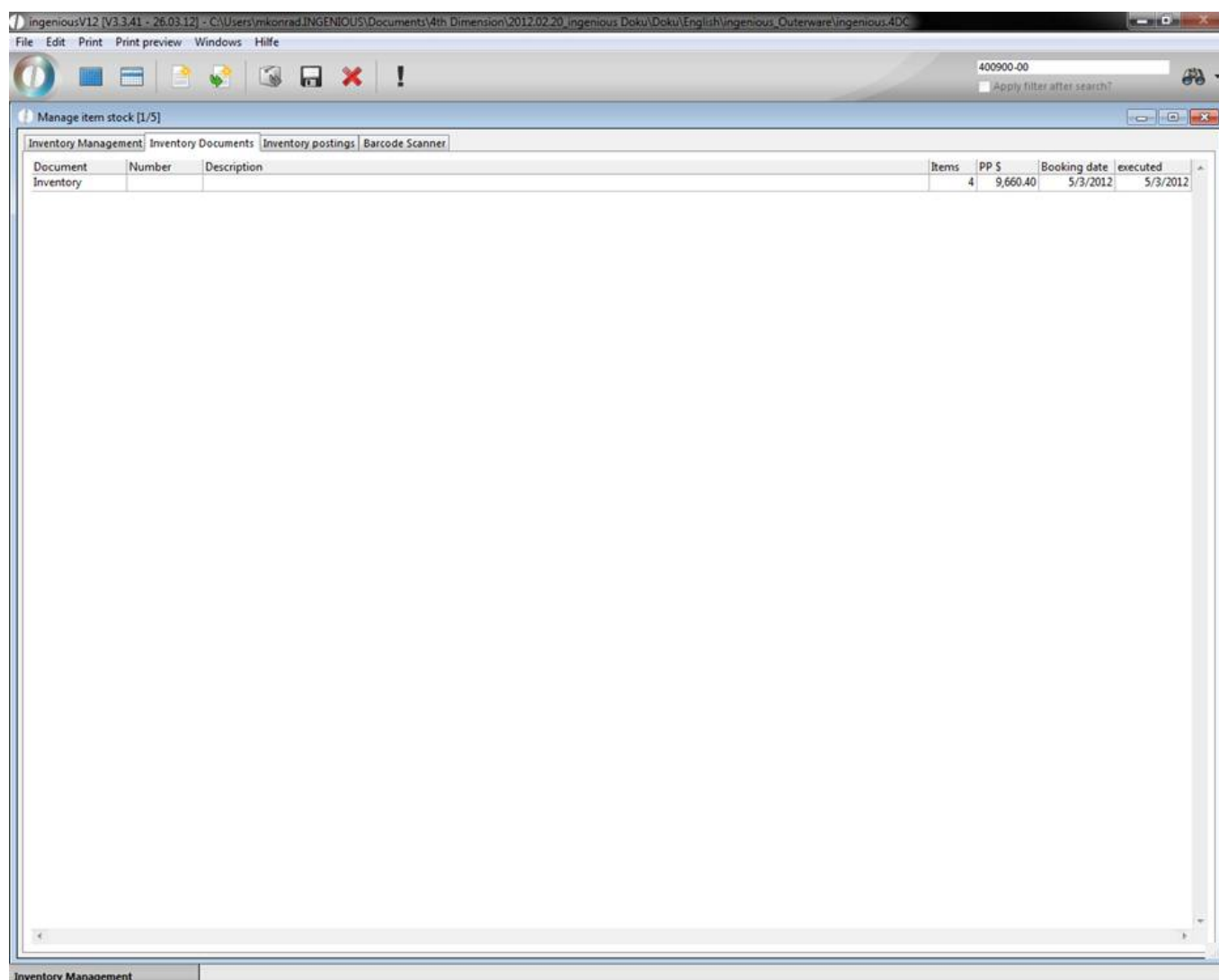
Matchcode	Item number	delivery tin	Minimum	Ordered	Reserved	Quantity in Inventory	PP \$ / Unit	PP \$	Last inventory
# 6 Fisher Plug - universal mount plug	400900-00	0.000	0.000				0.04 / Piece		
# 6 Fisher Plug - universal mount plug FL	400900-00	0.000	0.000				0.04 / Piece		
#14 x 3" SS Panel Mate FL	461129-30	0.000	0.000				21.00 / box00		
1 Ch. Remote Wall Mount Transmitter, cream	164024-02	0.000	2.000				54.56 / Piece		
1 Ch. Remote Wall Mount Transmitter, cream FL	164024-02	0.000	0.000				54.56 / Piece		
1 Ch. Remote Wall Mount Transmitter, white	164024-01	0.000	2.000				54.56 / Piece		
1 Ch. Remote Wall Mount Transmitter, white FL	164024-01	0.000	1.000				54.56 / Piece		
1 Ch. Remote Transmitter Waterproof	164022-00	0.000	2.000				31.09 / Piece		
1 Ch. Remote Transmitter Waterproof FL	164022-00	0.000	0.000				31.09 / Piece		
1 Ch. Remote Wall Mount Transmitter - cream	100100-10	3.000	2.000	0.000	0.000	1.000	7.60 / PC		
1 Channel	2005326	0.000	5.000				27.50 / PC		
1,2 Channel	2005914	0.000	5.000	0.000	0.000	2.000	27.50 / PC		3/12/2012 - 15:34:25
1:11 Record Gear	143001-00	0.000	100.000	0.000	0.000	5.000	11.81 / Piece		3/13/2012 - 16:11:43
1:11 Record Gear FL	143001-00	0.000	7.000	0.000	0.000	5.000	11.81 / Piece		3/13/2012 - 16:12:54
1:5 Record Cardan	143000-00	0.000	100.000				10.71 / Piece		
1:5 Record Cardan FL	143000-00	0.000	12.000				10.71 / Piece		
1" Rail, brown	130107-04	0.000	0.000	0.000	0.000	2.000	2.25 / ft		3/13/2012 - 10:28:41
1" Rail, white	130107-01	0.000	0.000				1.59 / ft		
1/2" Hole Plug (Beauty Button), beige	157000-03	0.000	1,000.000				0.05 / Piece		
1/2" Hole Plug (Beauty Button), beige FL	157000-03	0.000	2.000				0.05 / Piece		
1/2" Hole Plug (Beauty Button), black	157000-08	0.000	500.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), black FL	157000-08	0.000	0.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), brown	157000-04	0.000	1,000.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), brown FL	157000-04	0.000	0.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), cream	157000-02	0.000	1,000.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), cream FL	157000-02	0.000	2.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), gray	157000-05	0.000	1,000.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), gray FL	157000-05	0.000	1.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), silver	157000-07	0.000	2,000.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), silver FL	157000-07	0.000	0.000				0.06 / Piece		
1/2" Hole Plug (Beauty Button), white	157000-01	0.000	5,000.000	0.000	0.000	-44.000	0.06 / Piece		

The red colored ones have a quantity smaller than the defined minimum stock level. With the help of the search function you can determine inventory items in different postings and directly in one posting. By clicking the button  you delete a listed item from the document and with the help of the button  you can add any item. By clicking the corresponding item you can enter the available quantity, minimum stock level and the measurements in the bottom area. When you press the return key, the entered values will be accepted and immediately the next item will be displayed.

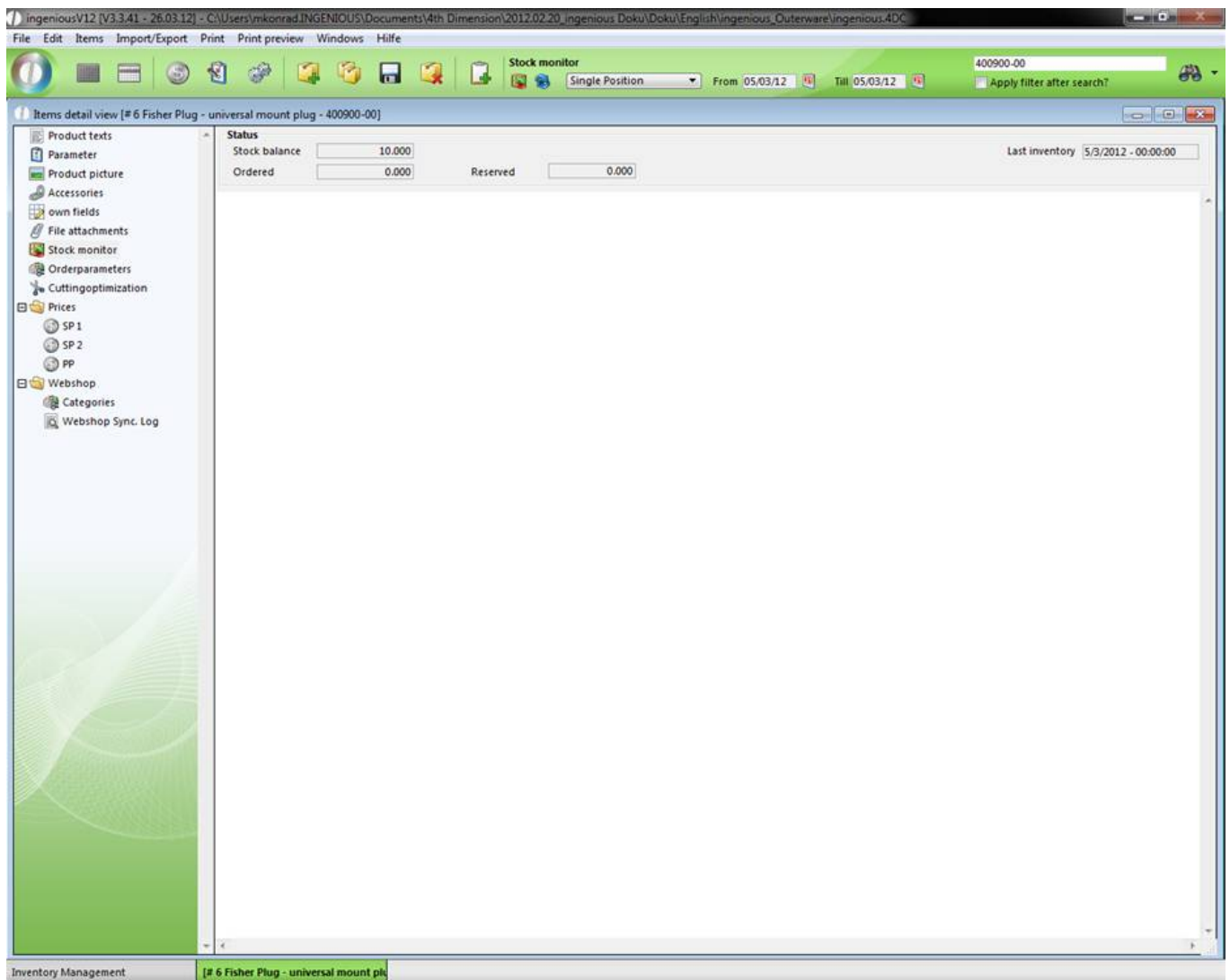


When you click the button , the inventory posting will be performed.



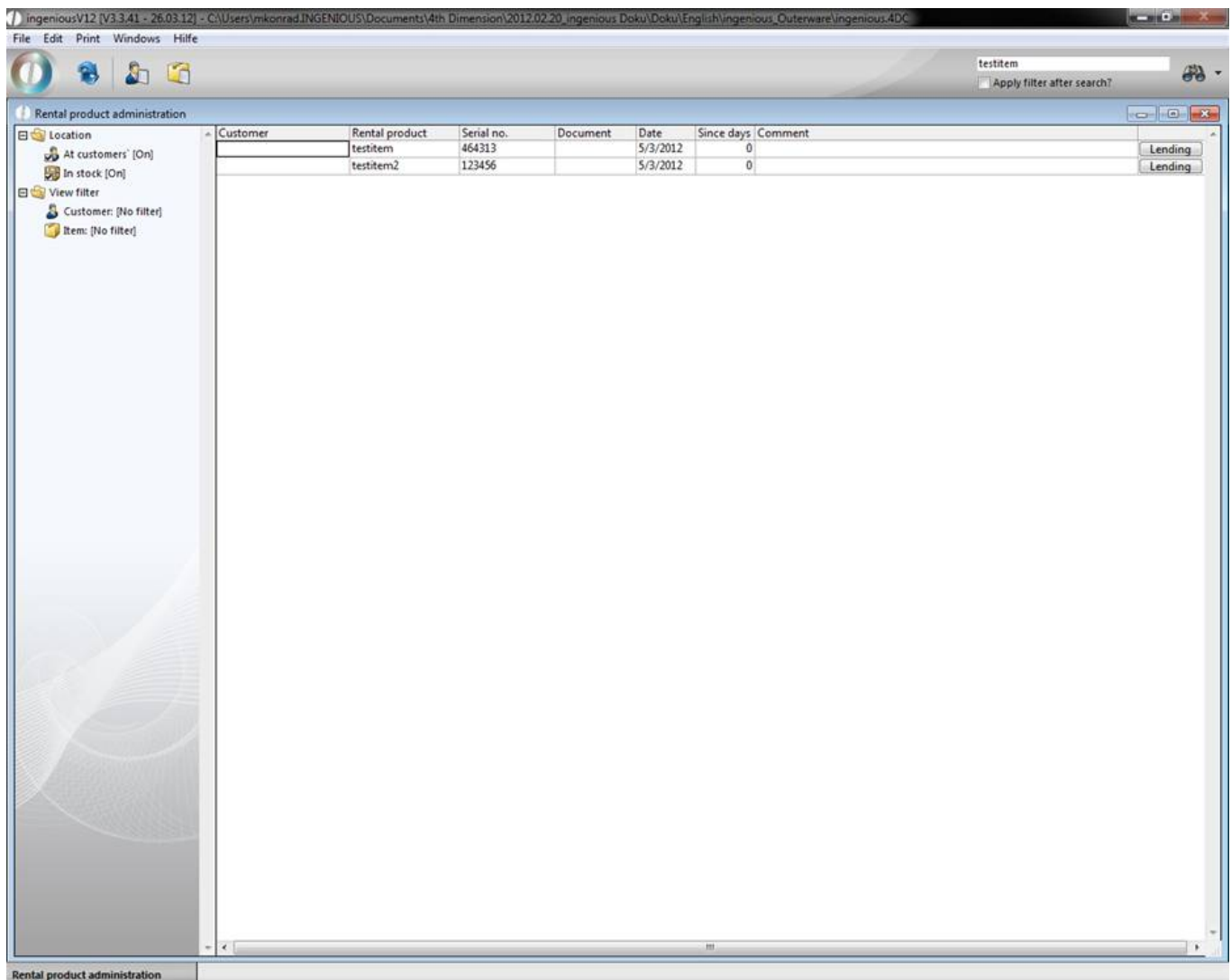


The inventory posting will be automatically registered in the stock monitor of the corresponding item.

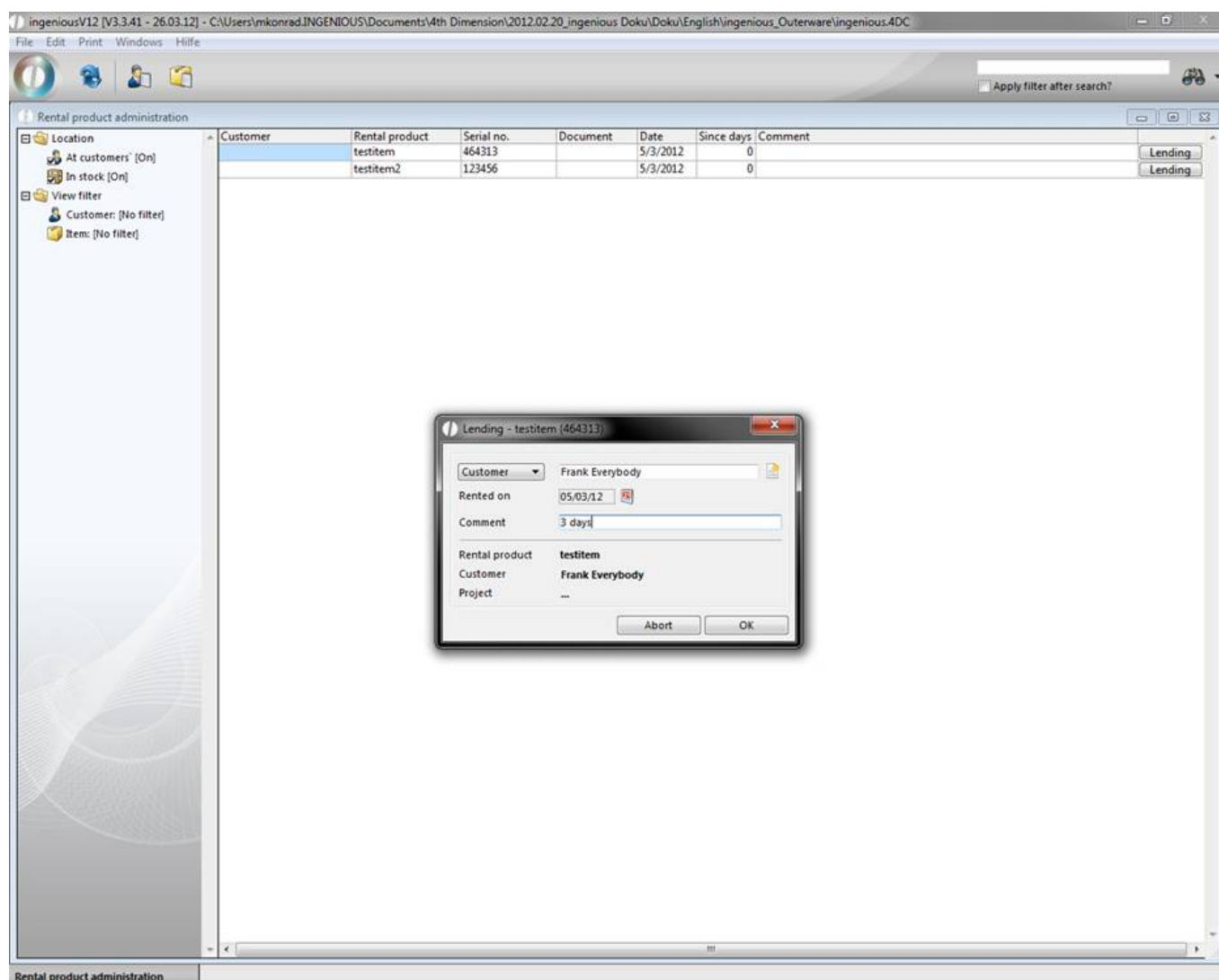


7.2 Rental product administration

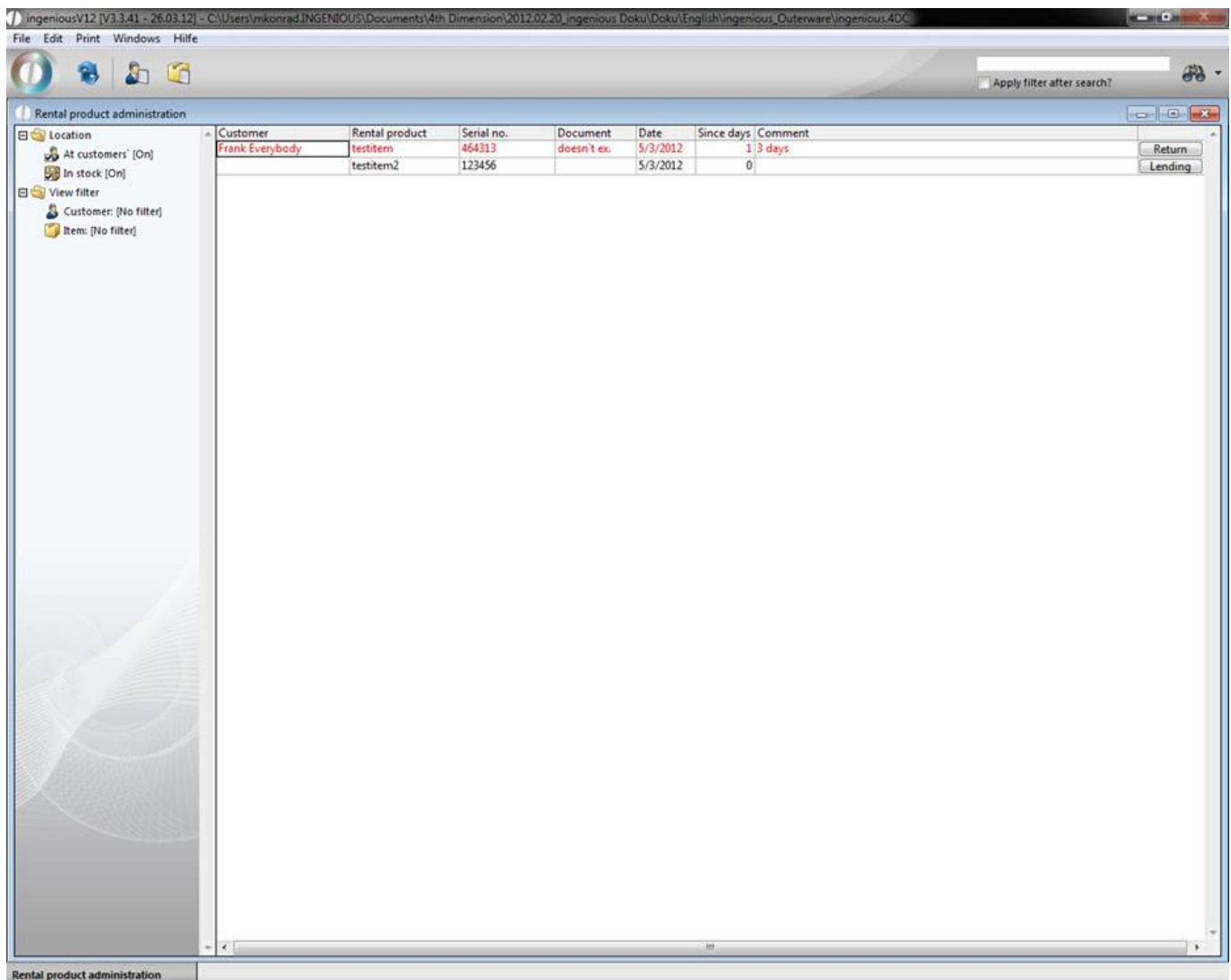
Ingenious .net makes it possible to manage and analyze numerous products with its rental product administration. There are two user interfaces: "General list view" and "Serial number assistant". The general list can be accessed by the menu "Rental product administration."



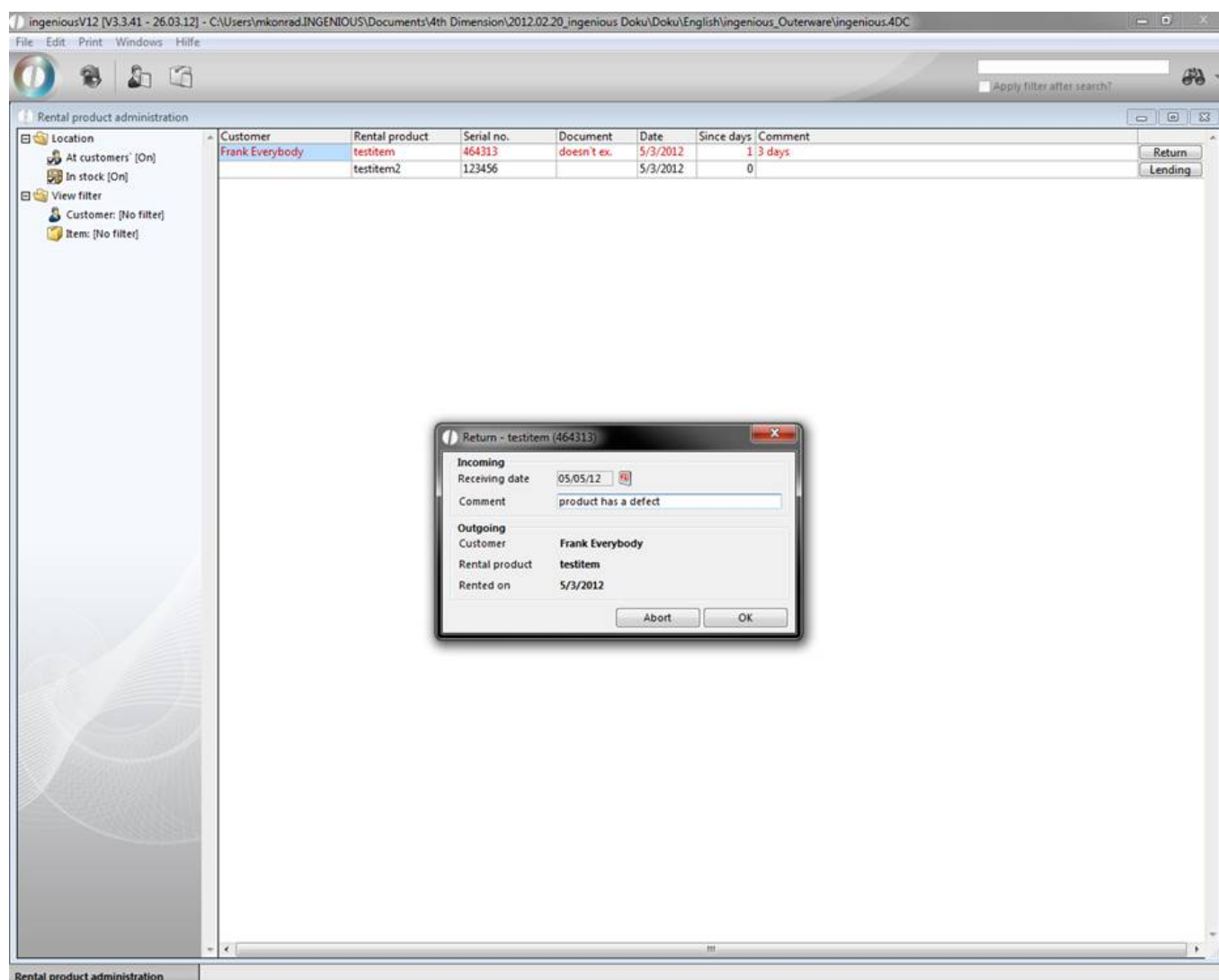
Here you have an overview of all existing rental products, and you can refine the search by using various search and filter operations. Only those articles will be displayed that are activated in the detail view in the "Parameter" column as rental products. Rental, return and posting are made with the Lending button.




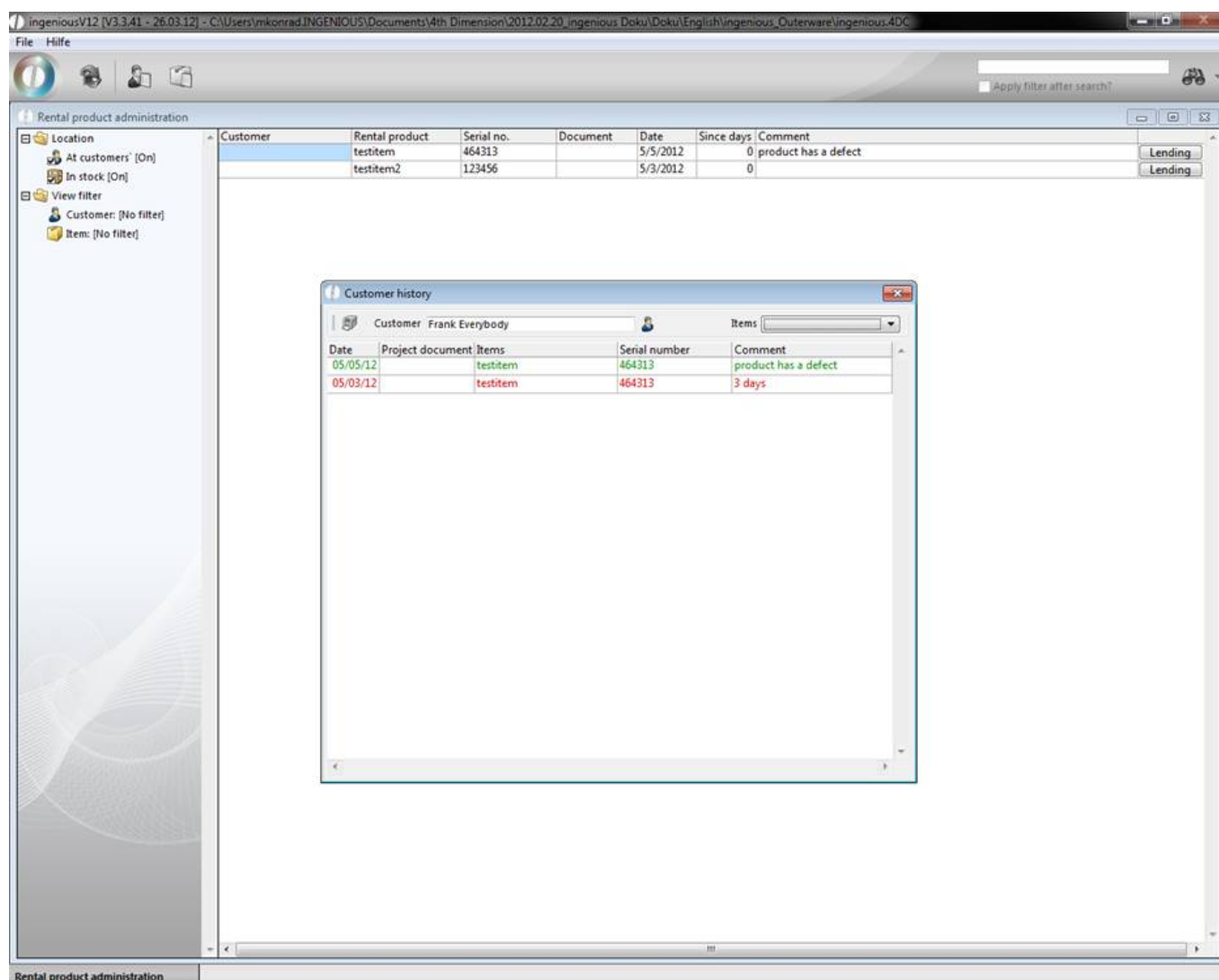
In the "Rental" window, you can select the desired customer and respectively the project, date of the rental and if necessary, make a comment about the rental. When activating the window, the article appears in red and has the label "Return".





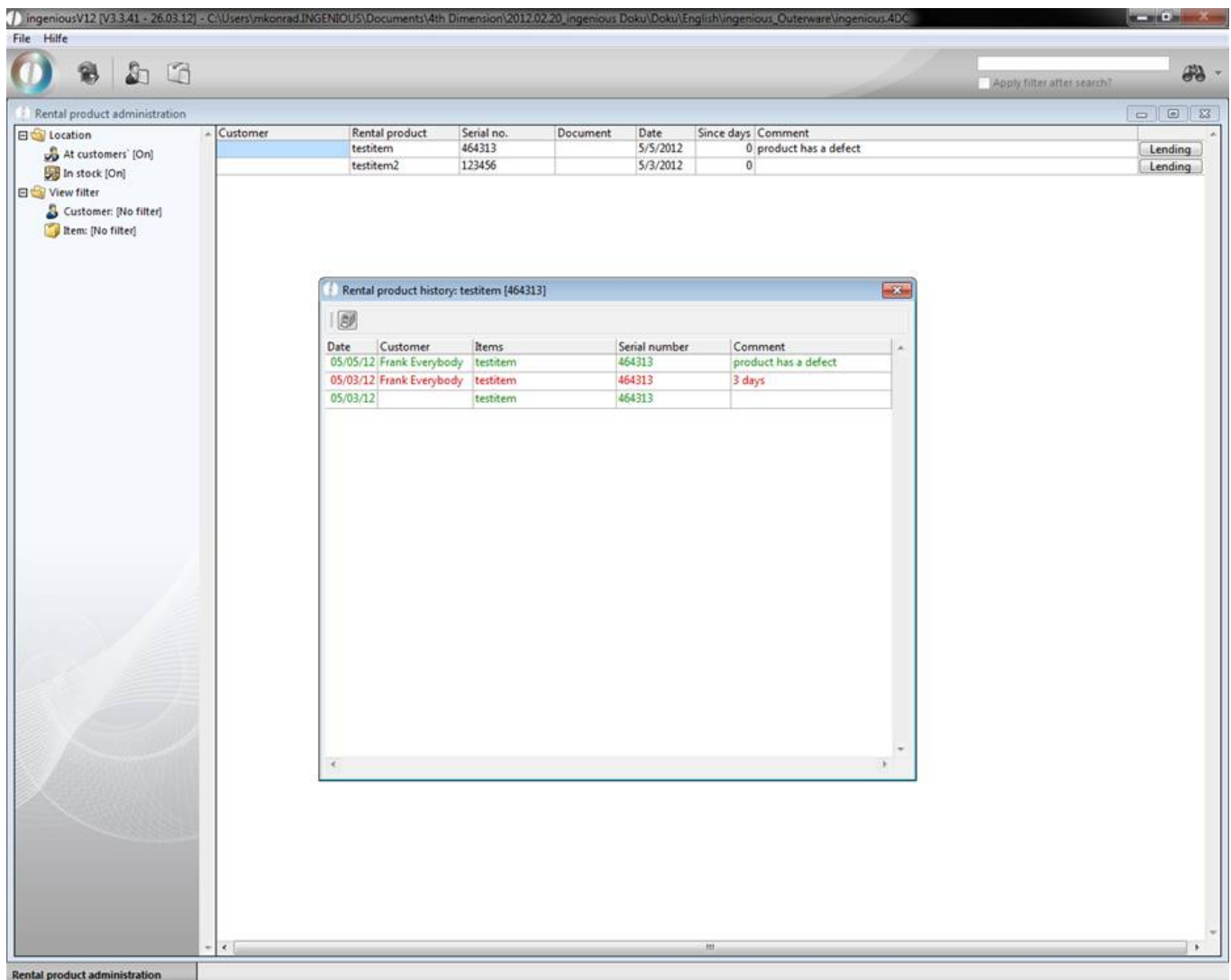
When the article is released again, click on the "Return" button and a new window opens. Here you can enter the customer remarks about the article and if necessary, change the return date. The article is found again in the "Rental" status and will be listed with the last return date and comment.



A further possibility is offered: With the “Customer history”  button, you can list the rental time periods for a customer. With the list field “Article”, you can also only show the data of a specific rental product.

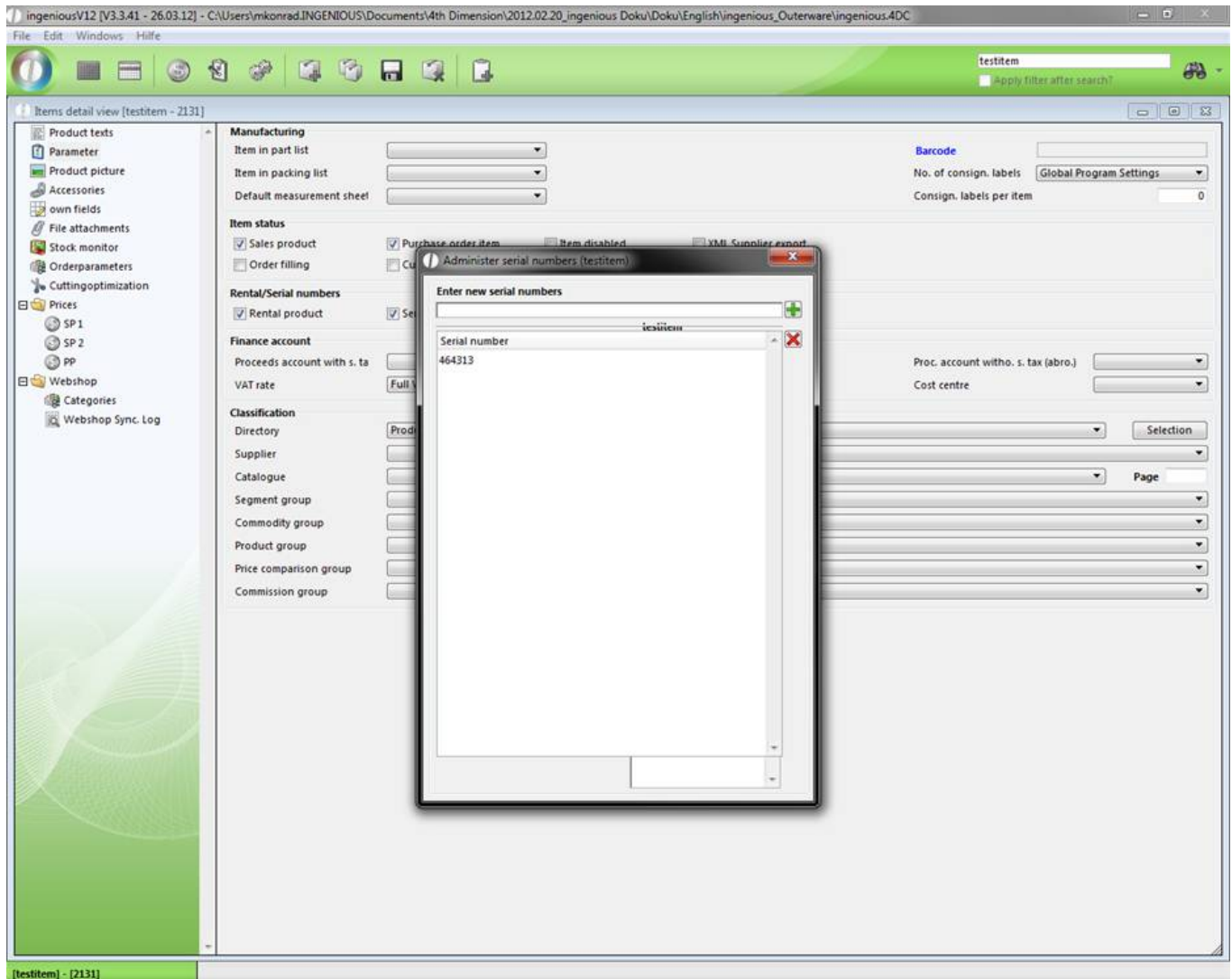


With the  button, "Rental product history", you can print the customer and rental article information. "Rental history", as well as "Customer history" can be printed by using the  button.




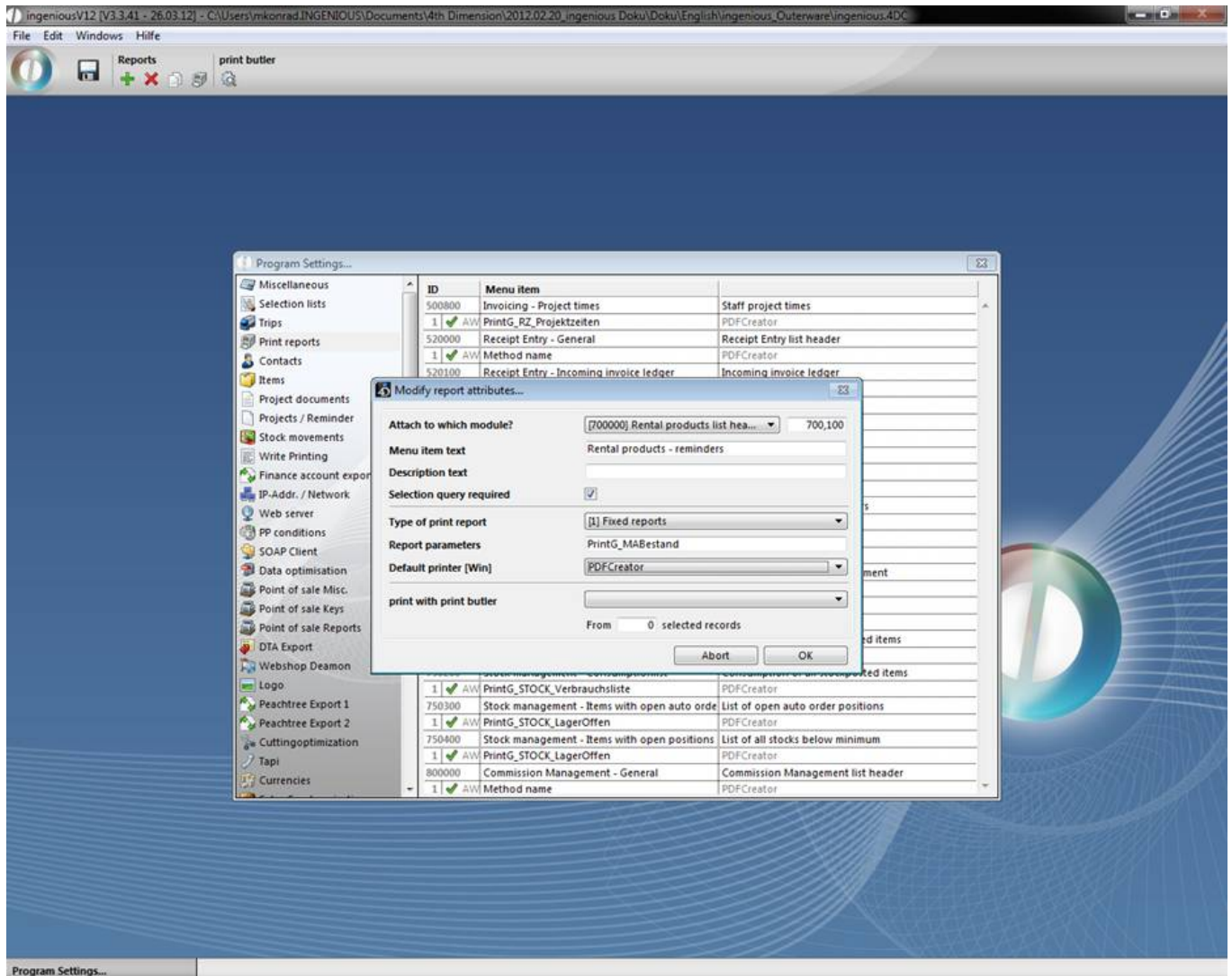
The serial number assistant


You will find the serial number assistant in the article detail view in the "Parameter" column. You access the assistant by placing a checkmark in the field, "Serial number duty" and by clicking on the **Serial no.** button. With the serial number assistant, the management of the serial numbers can be carried out (+ create new, - delete) for rental products.



Rental products - reminders

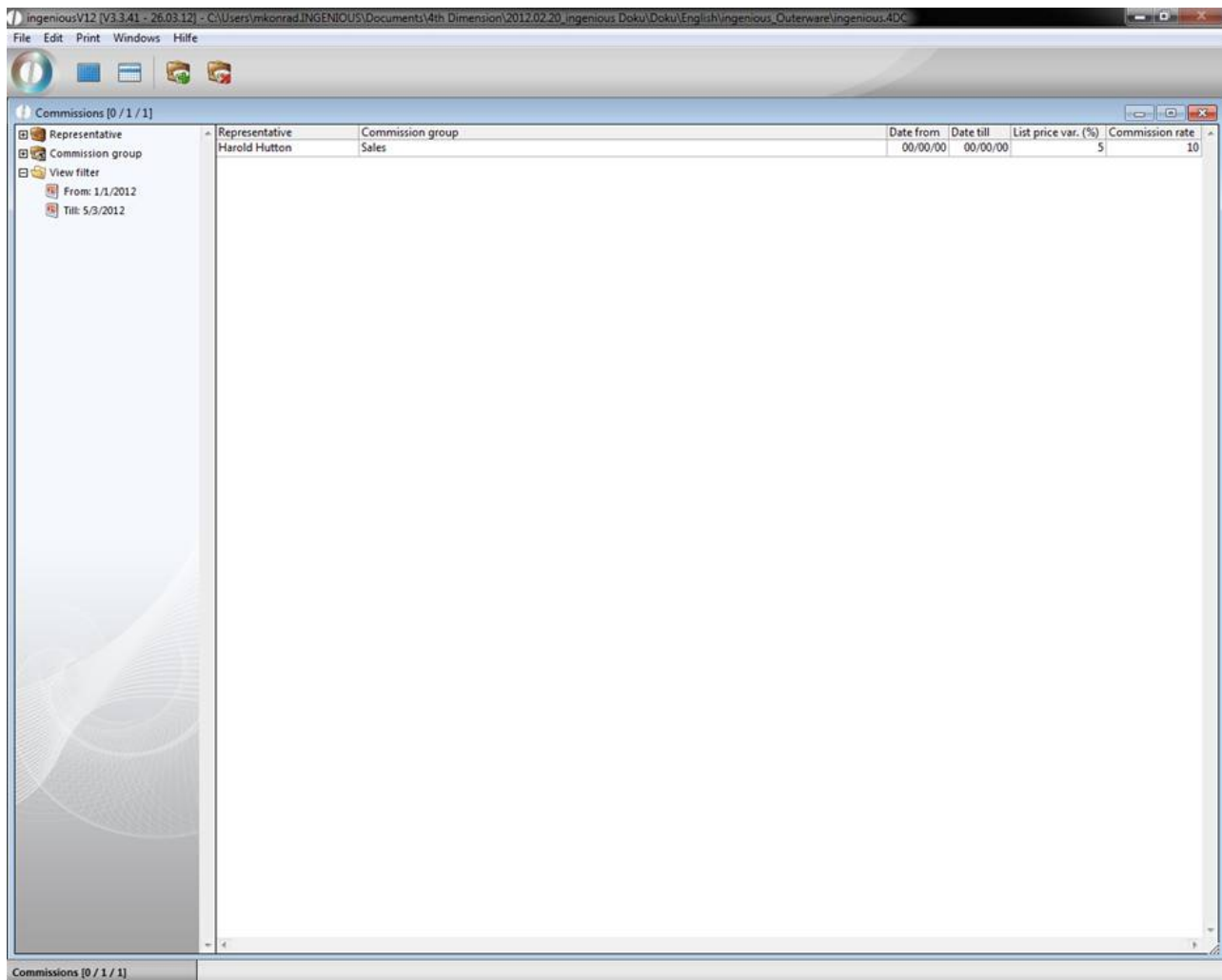
Reminders for rental products will be printed in a single report that must be created in the program settings in the column "Print reports" via the  button. Attach the report to the "Rental products list header" and select "(1) fixed reports" as the type of print report. In the "Report parameters" field, you enter the following: PrintG_MABestand.



When you have updated all the settings and saved them, you can print the desired print report in the “Rental product administration” module, with the “Print” menu. In case the print report is not available, please check whether the corresponding rights are cleared in the user administration. In the window that appears “Rental article administration customer base”, you can select individual contacts and/or a contact folder with the  button to print the reminder. Furthermore, you can list the number of days overdue with the field, “Since days is greater than”. Thus only reminders i.e. that are overdue three days or more with the return in default will be printed for the customers.

7.3 Commission management

Commission management from Ingenious.V12 provides automatic management and payment of commissions, for instance for field service employees. The agent of a contact will be identified in the column “Financial data / Classified” of the detail contact view.

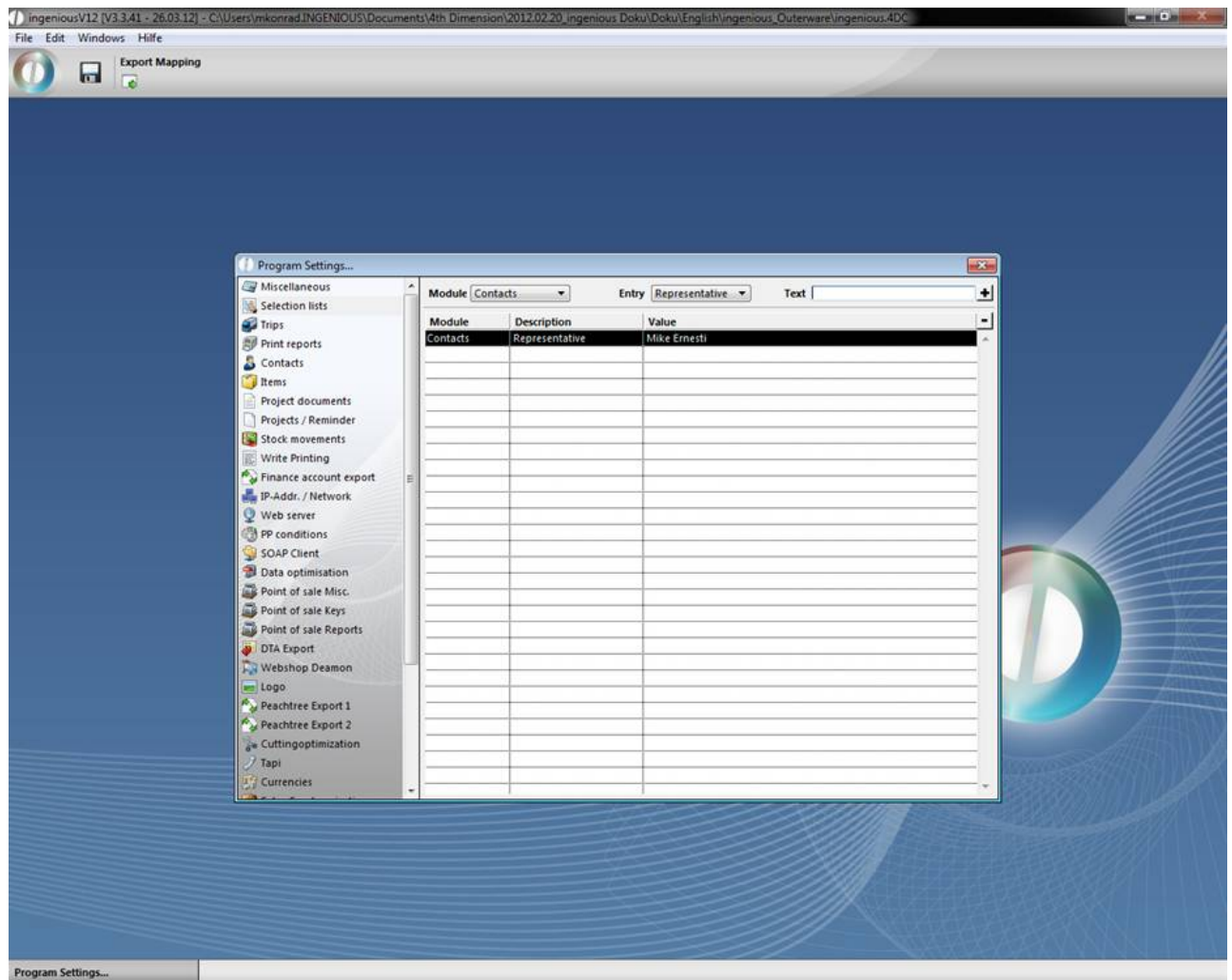


In the start view of commission management, you can select representatives according to name or to the commission group.

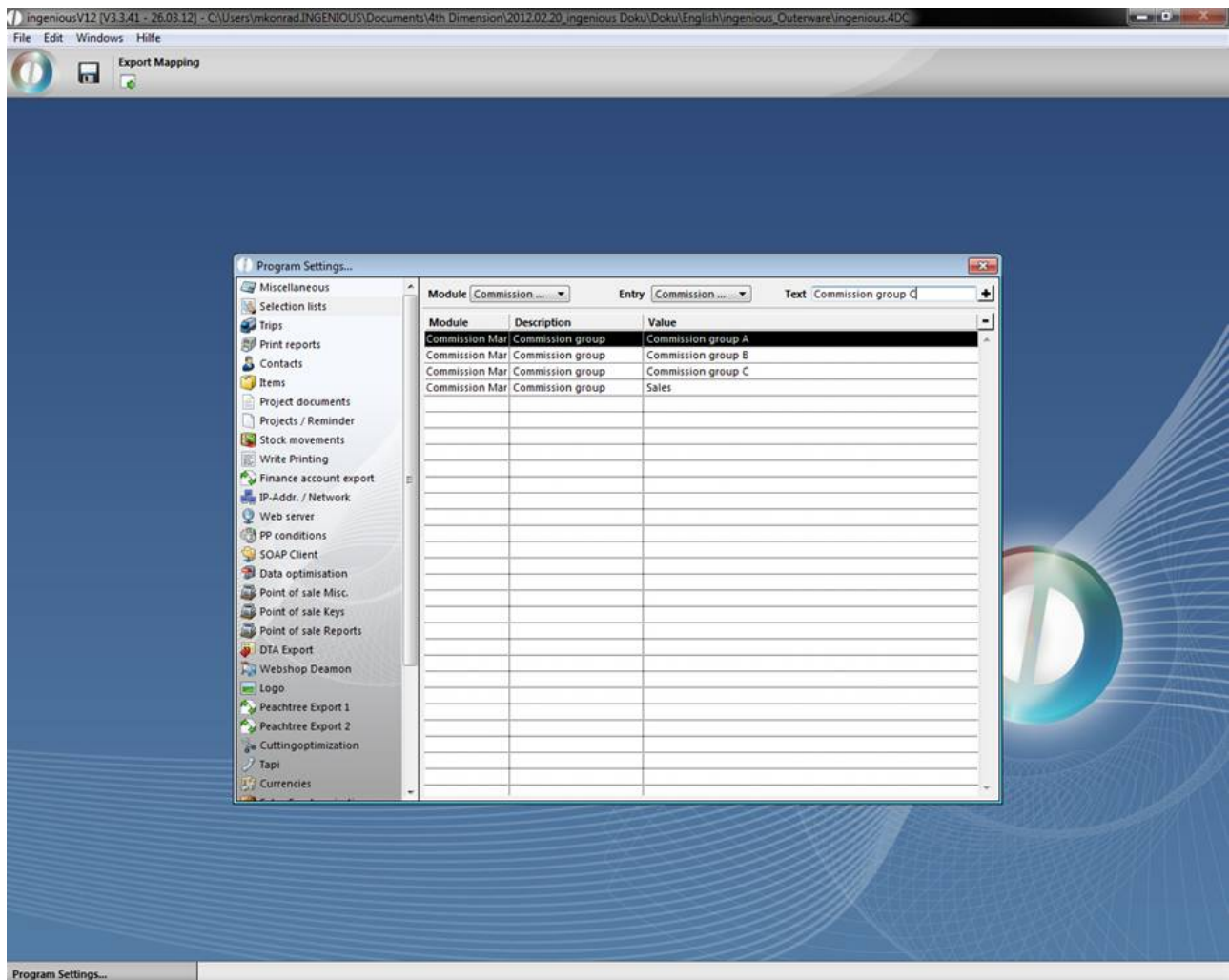
Practice with commission rates

Creating representatives

1. In order to determine an agent, you must first open the program settings, and then select the "Selection lists" area.
Now in the pop-up field
"Module" select the "Customer" field and select the menu item "Representative" in the "Entry" pop-up field.
All stored agents will appear in the table view.

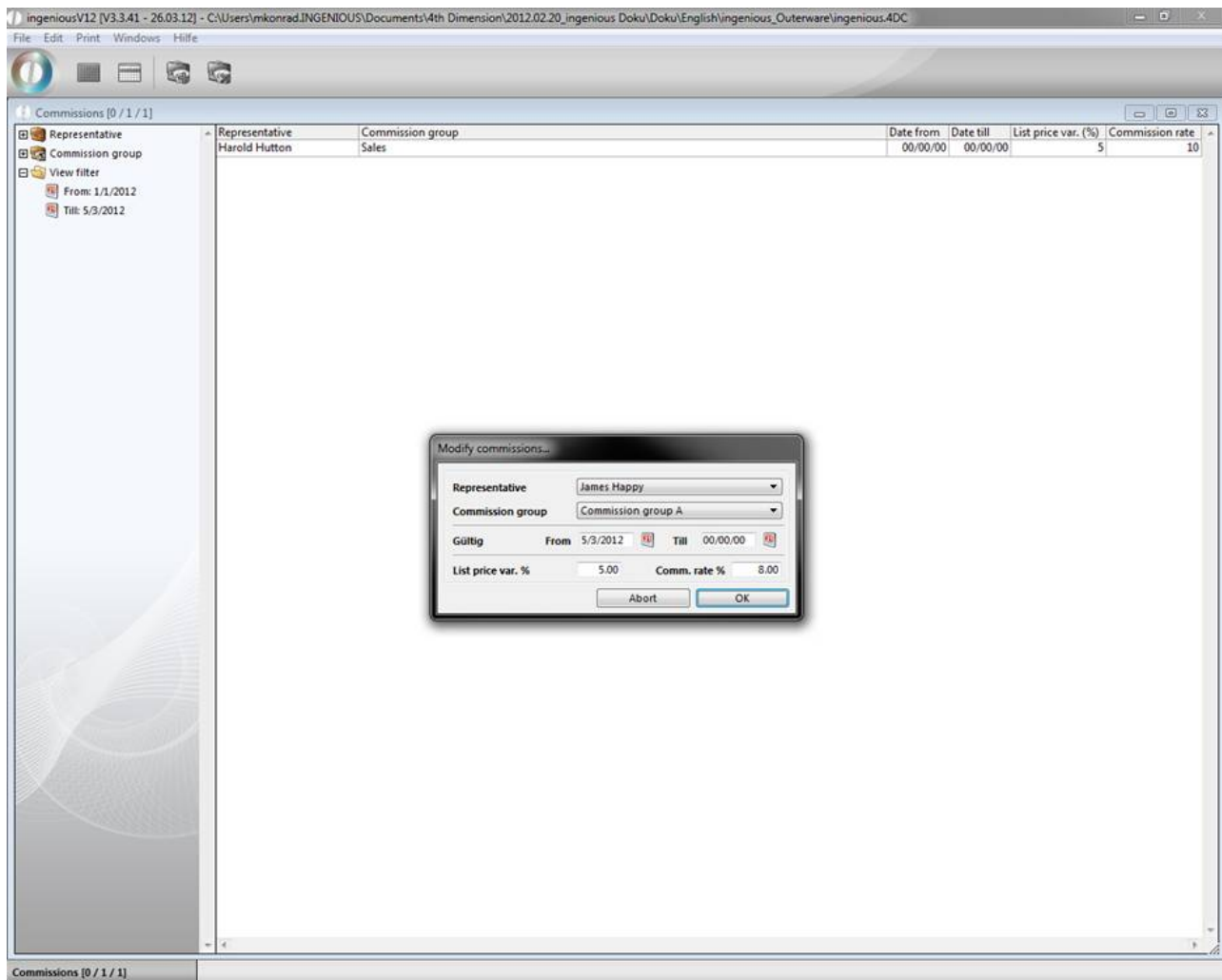


2. Enter your representative in the "Text field" (in this example it is "James Happy") and click on the button in order to insert the entry in the pop-up menu.



Create commission rate

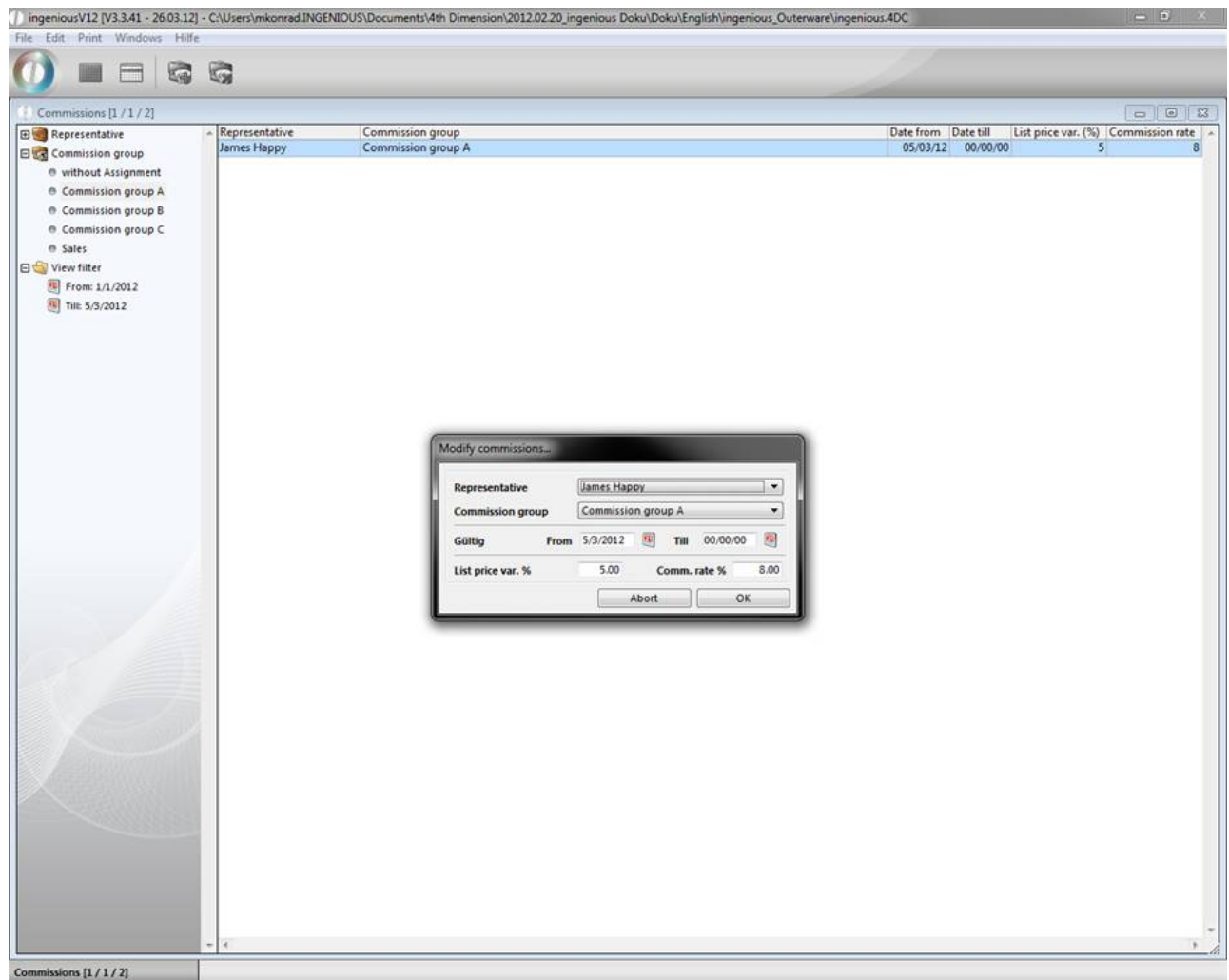
1. You are again in commission management and would like to generate a new commission rate. Click on the button.
2. The following window opens in which you enter the data analogous to the photo and confirm with "OK".




Change a commission rate and delete

In order to change an already existing commission rate you:

1. Open the "Commission group" folder and select the entry "Provision group A" folder.
2. Double click on the commission rate "James Happy" just created.



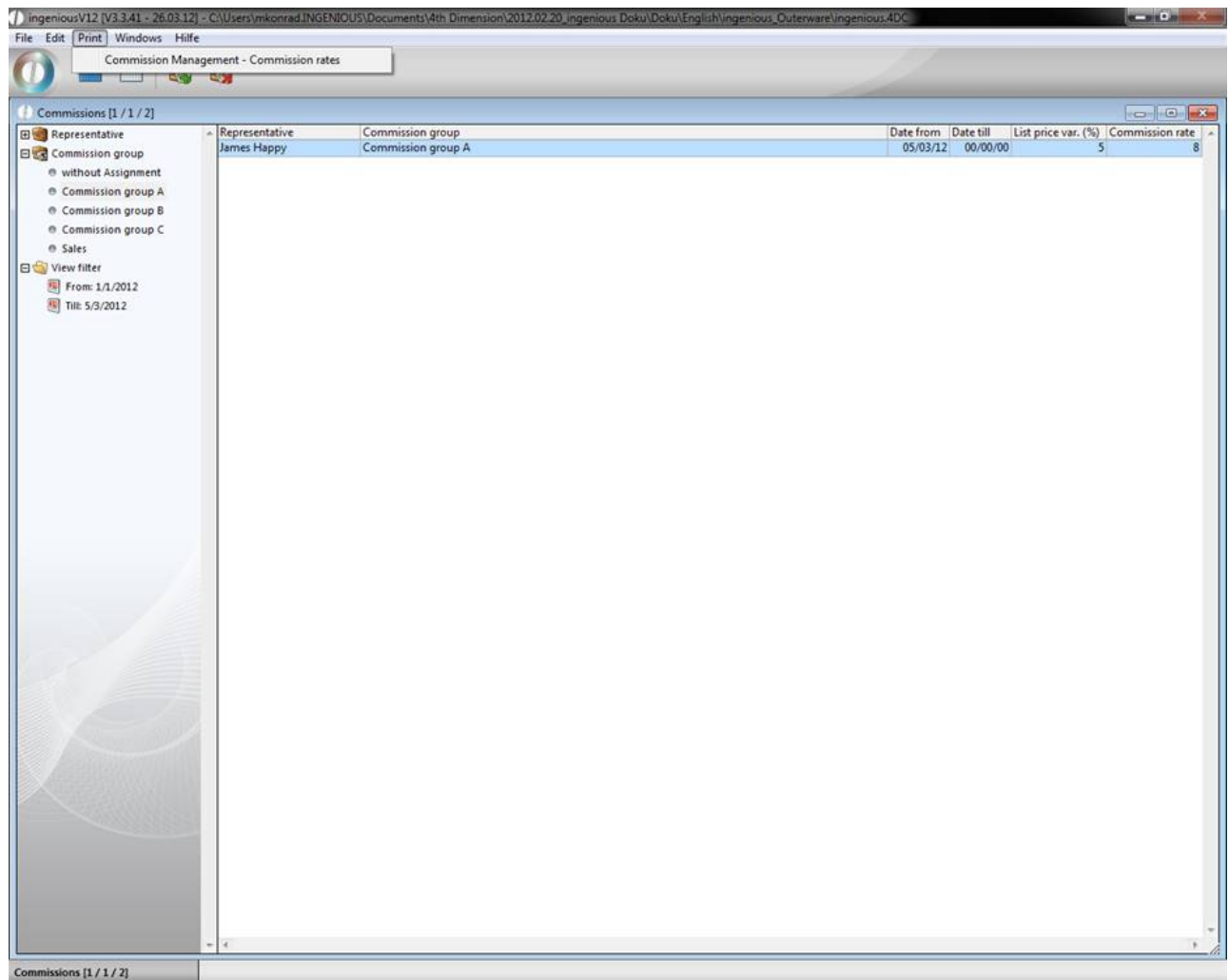
3. Change the value of any commission rate and confirm the change with "OK".

In order to delete a no longer needed commission rate for "James Happy" in this exercise, select the corresponding entry with a mouse click and click on the  button.

Print commission rate

You also have the possibility to print the commission rates.

1. In order to do this, select the entry "Print/Commission management – commission rates" in the main menu.



2. Hit the desired settings in the print dialogue window and confirm with the "OK" button. The printout occurs within seconds.

Commission statement

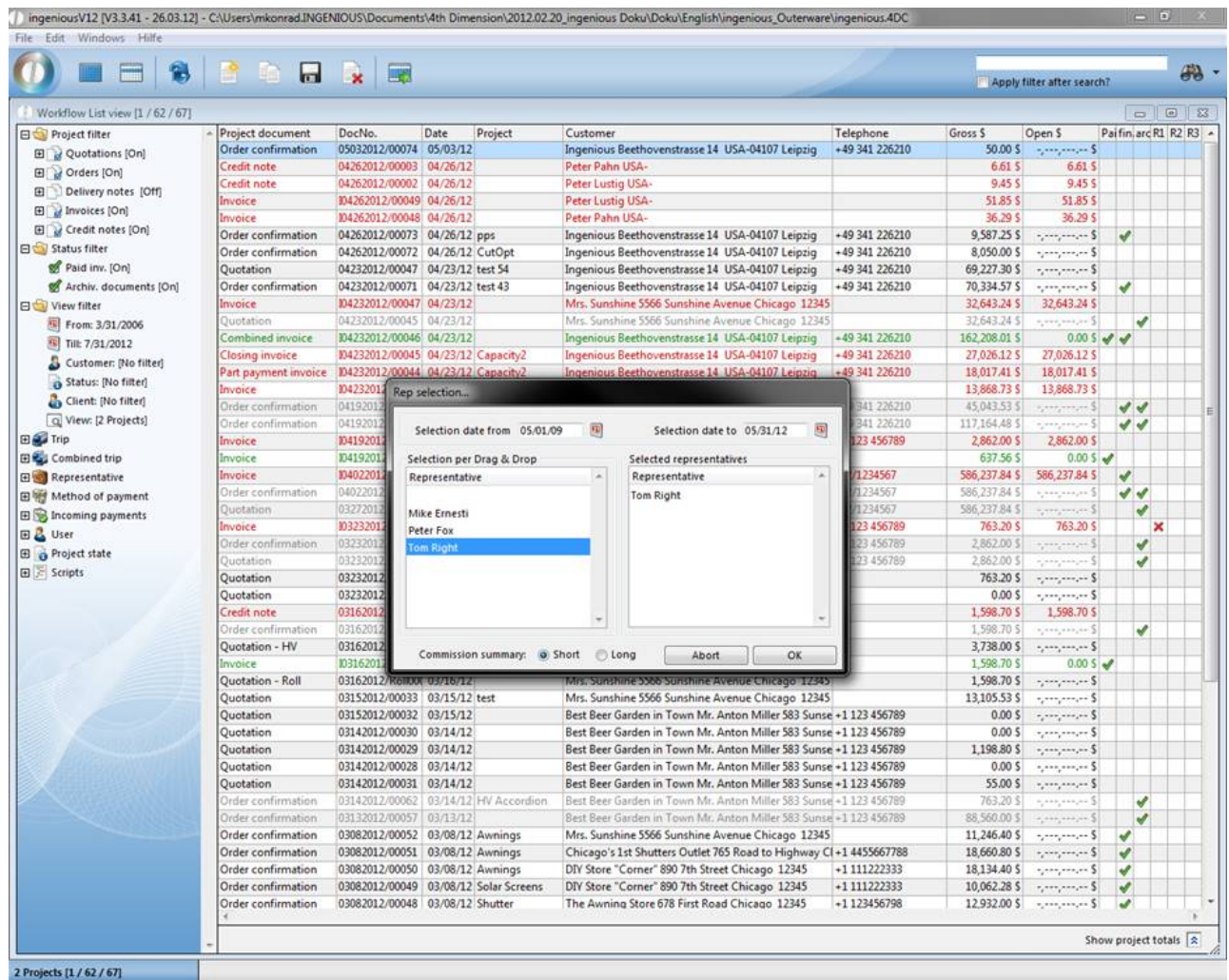
In order to calculate the commission of your representatives i.e. at the end of the month, proceed as follows.

1. Select the workflow module "Invoices" and click in the main menu on the menu item "Printing / Invoicing - commission summery".
2. After the standard print window (the options "show print preview" and "show print dialogue" can be activated at will), another window appears for the selection of the representatives and the time frame for which the commission calculation should be set.

The screenshot displays the ingenious.V12 software interface. The main window shows a 'Workflow List' with columns for Document Number, Date, Project, Customer, Telephone, Gross \$, Open \$, and various status indicators. A modal dialog titled 'Rep selection...' is open, allowing users to select a date range and choose representatives for a commission summary. The dialog includes fields for 'Selection date from' and 'Selection date to', a 'Selection per Drag & Drop' section, and a 'Selected representatives' section. The background table lists various documents such as 'Order confirmation', 'Credit note', 'Invoice', and 'Quotation' for different projects and customers.

Document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifm	arc	R1	R2	R3
Order confirmation	05032012/00074	05/03/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	50.00 \$						
Credit note	04262012/00003	04/26/12		Peter Pahn USA-		6.61 \$	6.61 \$					
Credit note	04262012/00002	04/26/12		Peter Lustig USA-		9.45 \$	9.45 \$					
Invoice	04262012/00049	04/26/12		Peter Lustig USA-		51.85 \$	51.85 \$					
Invoice	04262012/00048	04/26/12		Peter Pahn USA-		36.29 \$	36.29 \$					
Order confirmation	04262012/00073	04/26/12	pps	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	9,587.25 \$						
Order confirmation	04262012/00072	04/26/12	CutOpt	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	8,050.00 \$						
Quotation	04232012/00047	04/23/12	test 54	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	69,227.30 \$						
Order confirmation	04232012/00071	04/23/12	test 43	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	70,334.57 \$						
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Quotation	04232012/00045	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$						
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$					
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Invoice	04232012/00044	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	13,868.73 \$	13,868.73 \$					
Order confirmation	04192012/00044	04/19/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	45,043.53 \$						
Order confirmation	04192012/00044	04/19/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	117,164.48 \$						
Invoice	04012012/00044	04/01/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	2,862.00 \$	2,862.00 \$					
Invoice	04012012/00044	04/01/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	637.56 \$	0.00 \$					
Order confirmation	04022012/00044	04/02/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	586,237.84 \$	586,237.84 \$					
Quotation	03272012/00044	03/27/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	586,237.84 \$						
Invoice	03232012/00044	03/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	763.20 \$	763.20 \$					
Order confirmation	03232012/00044	03/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	2,862.00 \$						
Quotation	03232012/00044	03/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	2,862.00 \$						
Quotation	03232012/00044	03/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	763.20 \$						
Quotation	03232012/00044	03/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	0.00 \$						
Credit note	03162012/00044	03/16/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	1,598.70 \$	1,598.70 \$					
Order confirmation	03162012/00044	03/16/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	1,598.70 \$						
Quotation - HV	03162012/00044	03/16/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	3,738.00 \$						
Invoice	03162012/00044	03/16/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	1,598.70 \$	0.00 \$					
Quotation - Roll	03162012/00044	03/16/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	1,598.70 \$						
Quotation	03152012/00033	03/15/12	test	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,105.53 \$						
Quotation	03152012/00032	03/15/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		0.00 \$						
Quotation	03142012/00030	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		0.00 \$						
Quotation	03142012/00029	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		1,198.80 \$						
Quotation	03142012/00028	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		0.00 \$						
Quotation	03142012/00031	03/14/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		55.00 \$						
Order confirmation	03142012/00062	03/14/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		763.20 \$						
Order confirmation	03132012/00057	03/13/12		Best Beer Garden in Town Mr. Anton Miller 583 Sunse +1 123 456789		88,560.00 \$						
Order confirmation	03082012/00052	03/08/12	Awnings	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		11,246.40 \$						
Order confirmation	03082012/00051	03/08/12	Awnings	Chicago's 1st Shutters Outlet 765 Road to Highway CI +1 4455667788		18,660.80 \$						
Order confirmation	03082012/00050	03/08/12	Awnings	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	18,134.40 \$						
Order confirmation	03082012/00049	03/08/12	Solar Screens	DIY Store "Corner" 890 7th Street Chicago 12345	+1 111222333	10,062.28 \$						
Order confirmation	03082012/00048	03/08/12	Shutter	The Awning Store 678 First Road Chicago 12345	+1 123456798	12,932.00 \$						

- Now in the fields "Selected date from" or "Select date to", you must provide a time span for the commission statement. Alternatively, you can also use the buttons. Behind them a calendar is hidden with which the input of the date is possible. If the commissions must be paid in the set time span, the corresponding representatives appear in the left field "Representative".
- Pull the desired representative using Drag & Drop (also click the representative with your mouse and drag it while pressing the mouse) in the representative field of the area "Representative will be selected".



5. In the lower part of the window, you still have the possibility to choose between a "shorter" and "longer" commission statement.

The difference exists in the fact that on the "long" commission statement, every order with the single articles and article prices is performed. With the "short" statement, only the sum of the projects is shown in tabular form.

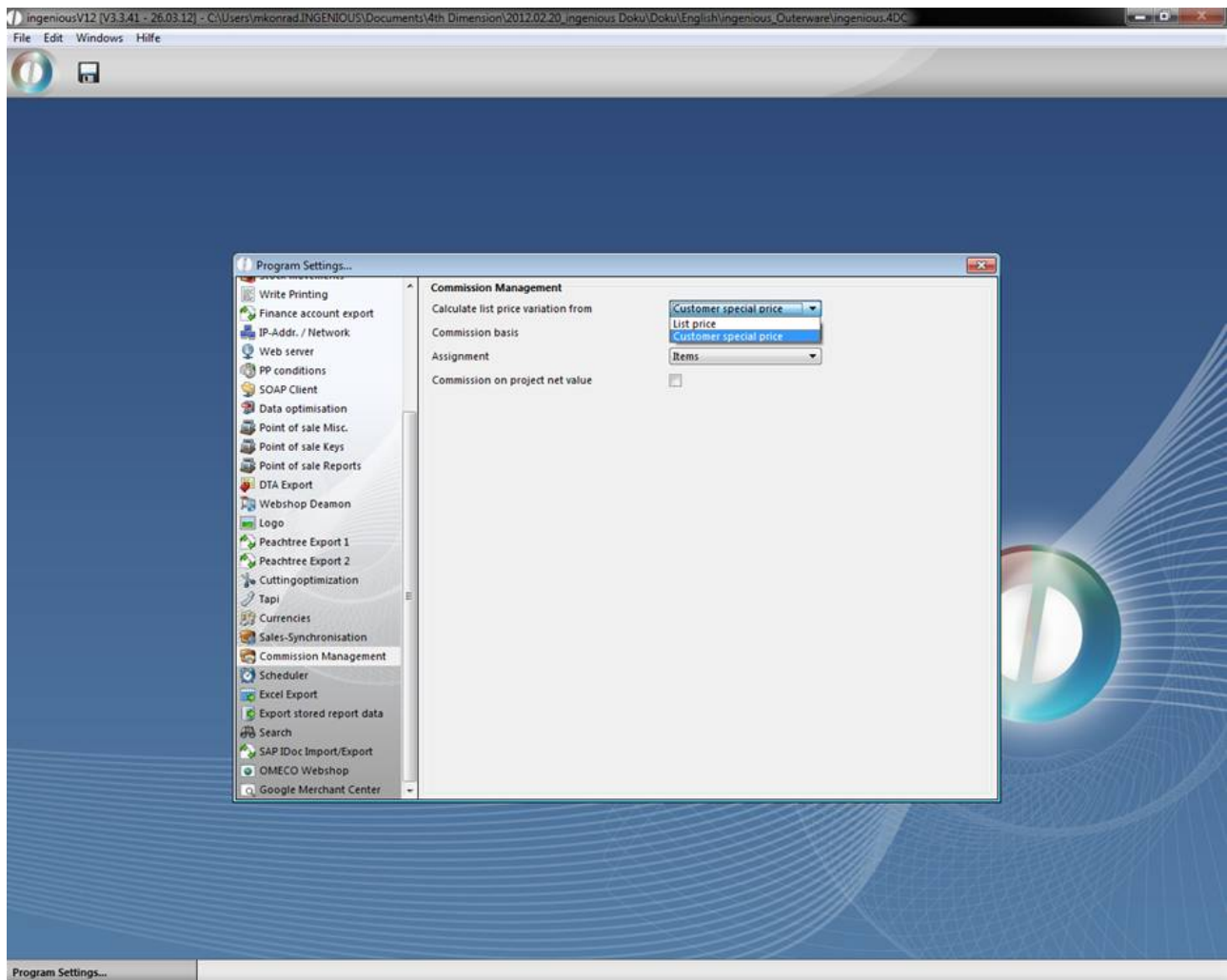
6. Depending on whether you marked the options "Show print preview" or "Show print dialogue", follow these windows. If you have selected none of these options, the printing of the commission statement occurs for the selected representative.

Attention! Only article commissions that are also assigned to a commission group are calculated! For articles that have no commission group assigned, the representative also receives no commission payment. The allocation of a commission group to an article occurs in the pop-up field "Commission group" in the "Parameter" area of the detail view of an article.

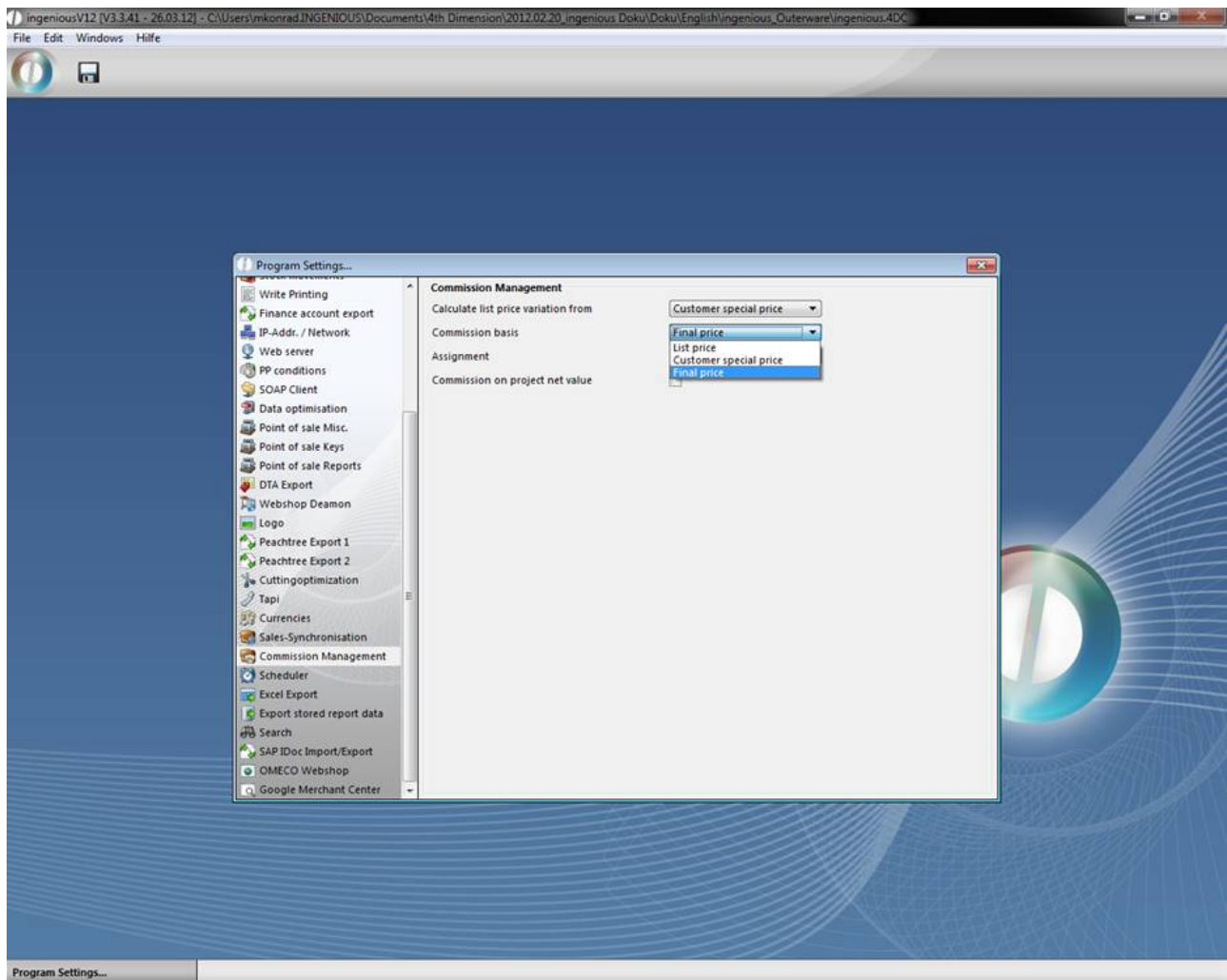
So far the commission was calculated by the following model:

- Catalog price variance based on the customers individual special price
- Selection of the rate of commission by means of the representative, the commission group bind to the item and the catalog price variance
- Calculation of the commission with the rate of commission and the final price of the item

A new category was added to the program settings, where you can modify this calculation. For the calculation of the catalog price variance you can choose between the list price assigned to the item and the special price assigned to the contact.



The basis of commission can be the list price, the individual customer special price or the actual final price.

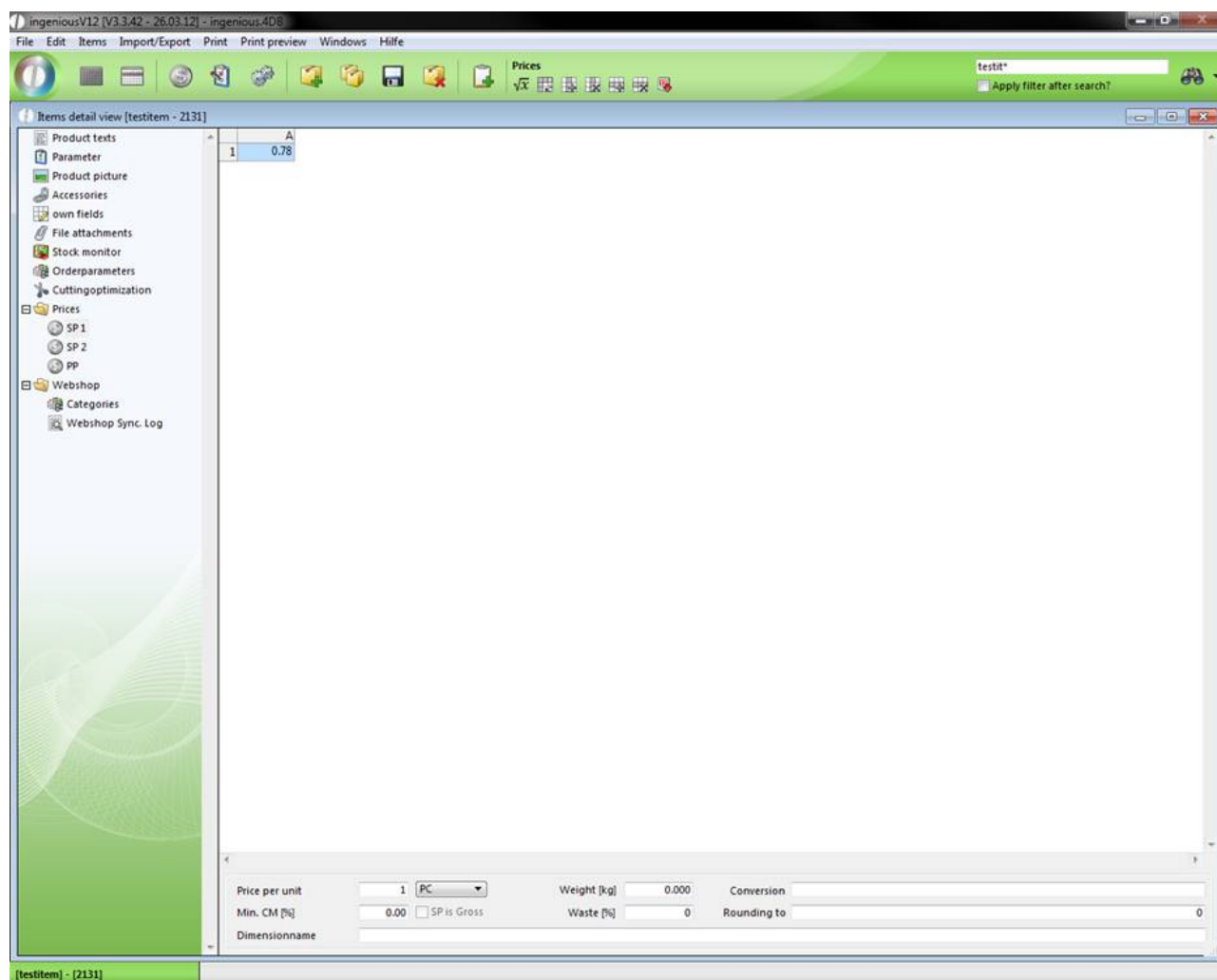


If you want to keep the usual calculation, you have to make the following settings:

- Calculate the list price variance from the individual customer special price
- Commission basis is the final price

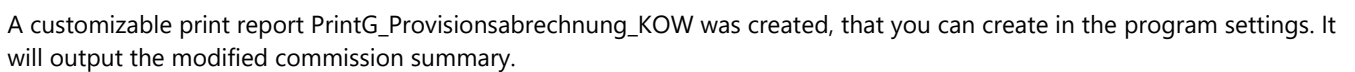
These settings are set by default, when you update to the new version.

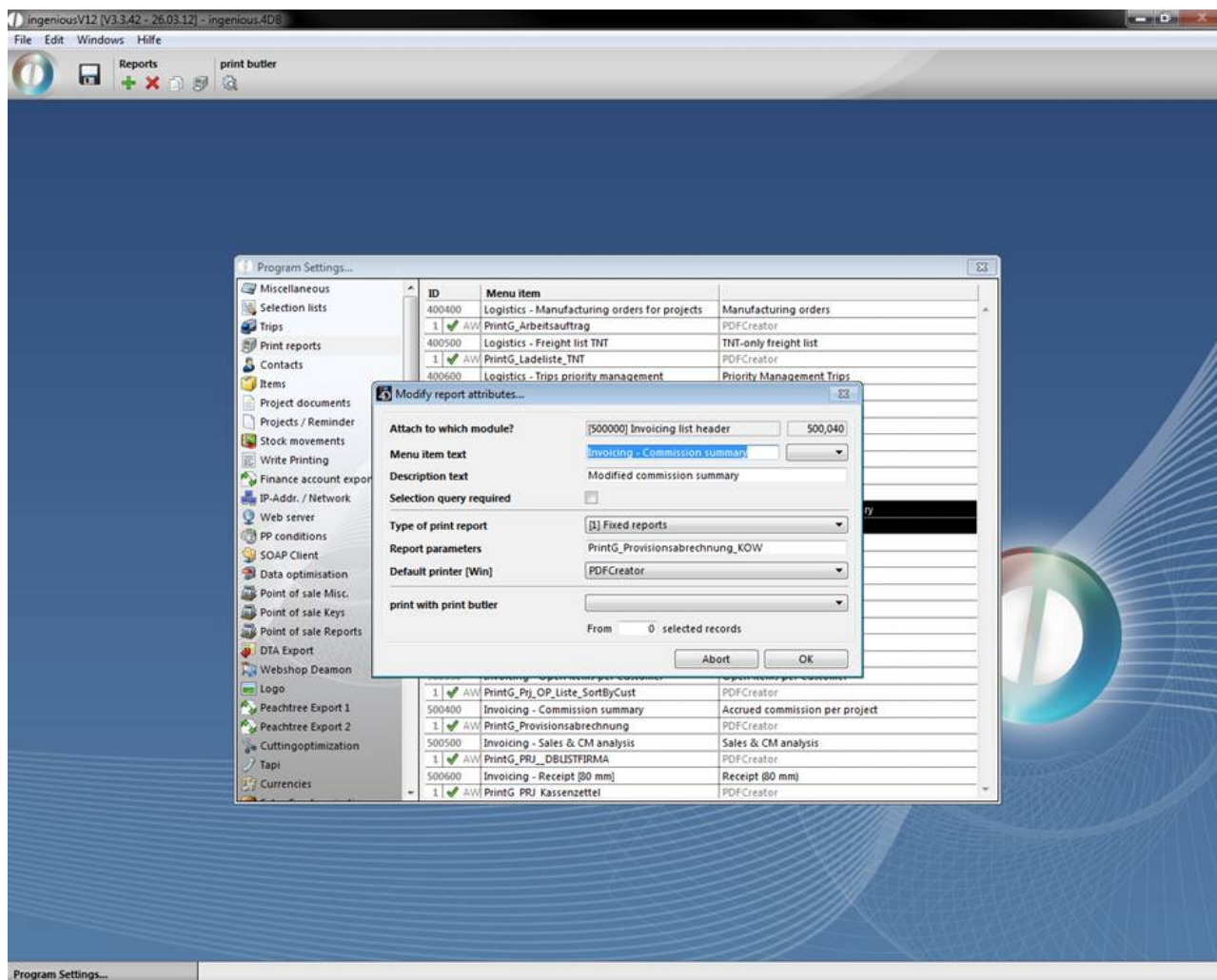
Definition:



Example list price

Example individual customer special price



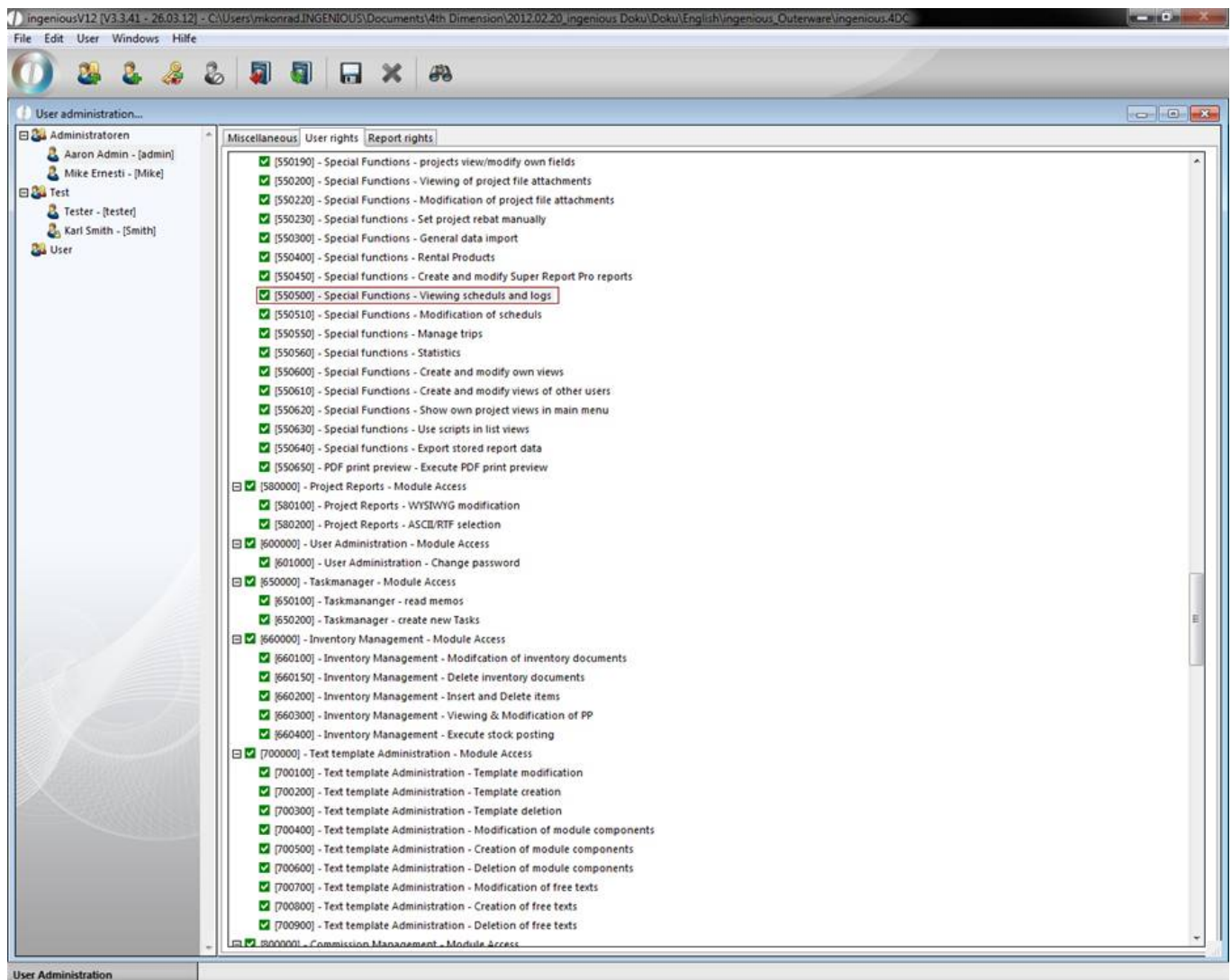


To be able to use the print report, you have to enable the corresponding report right.

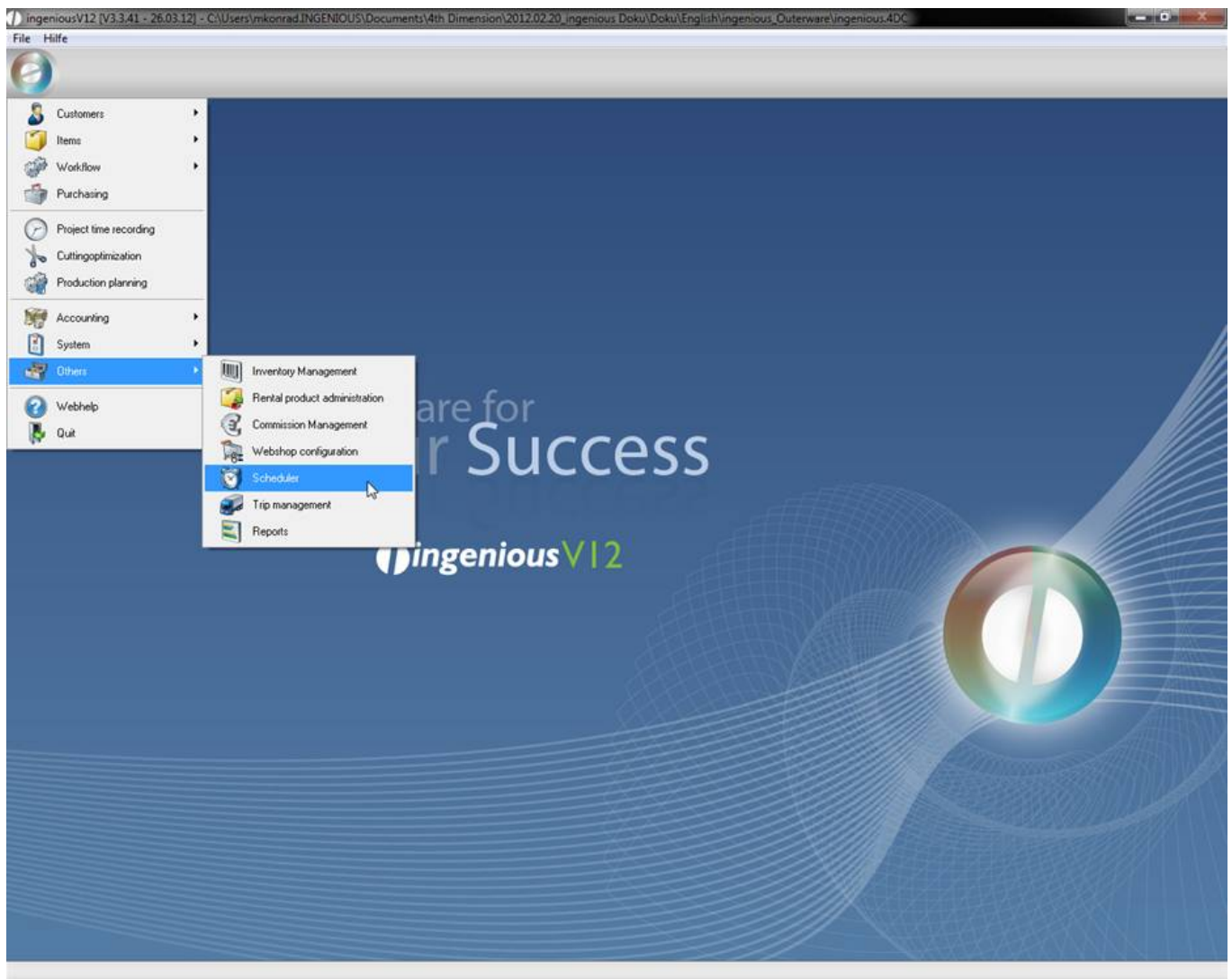
In the new report also the rebate positions are regarded.

7.4 Scheduler

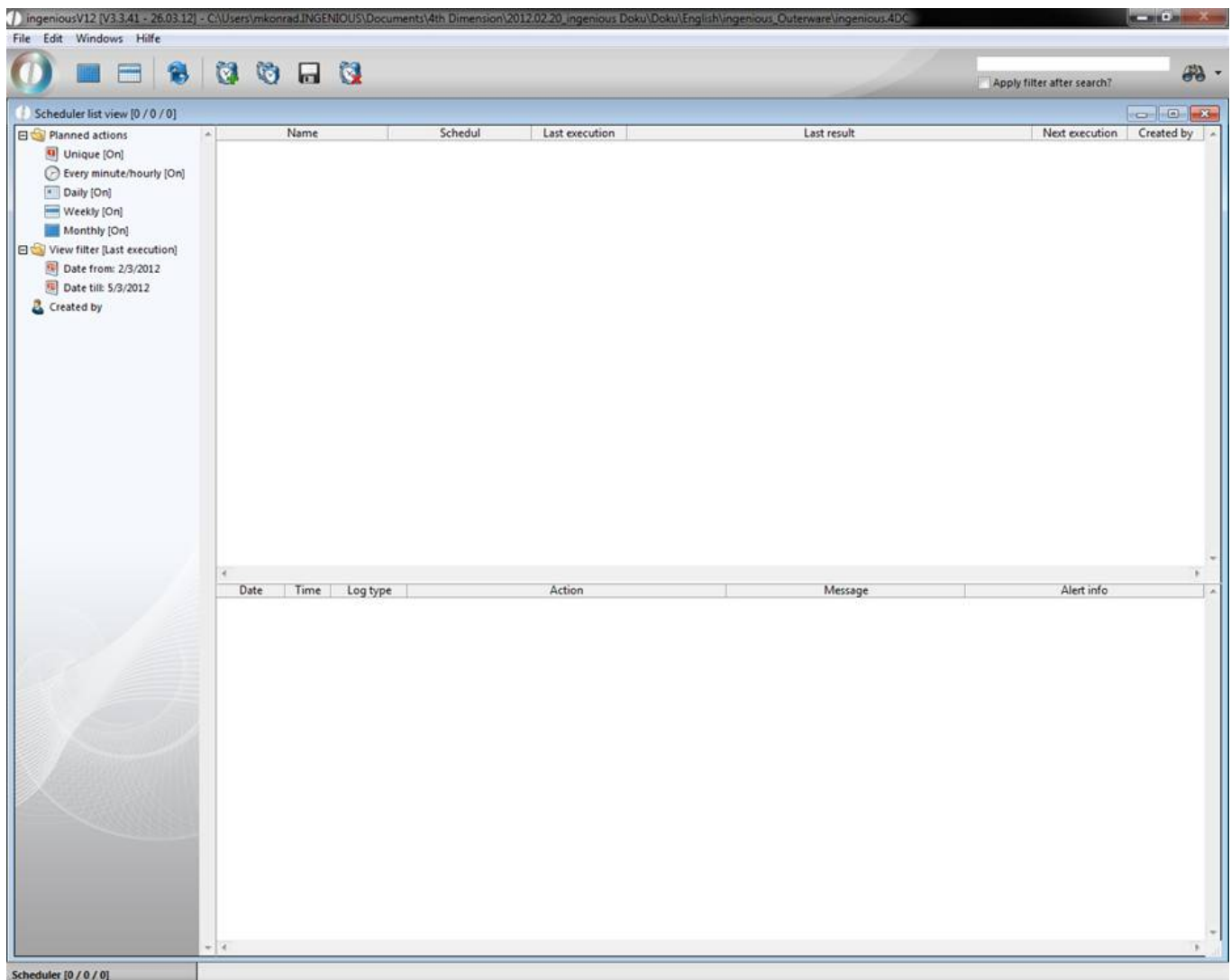
The scheduler is a new module for the execution of automatic, time controlled scripts. To be able to use the module, you have to have the specific license and the required user rights have to be enabled.




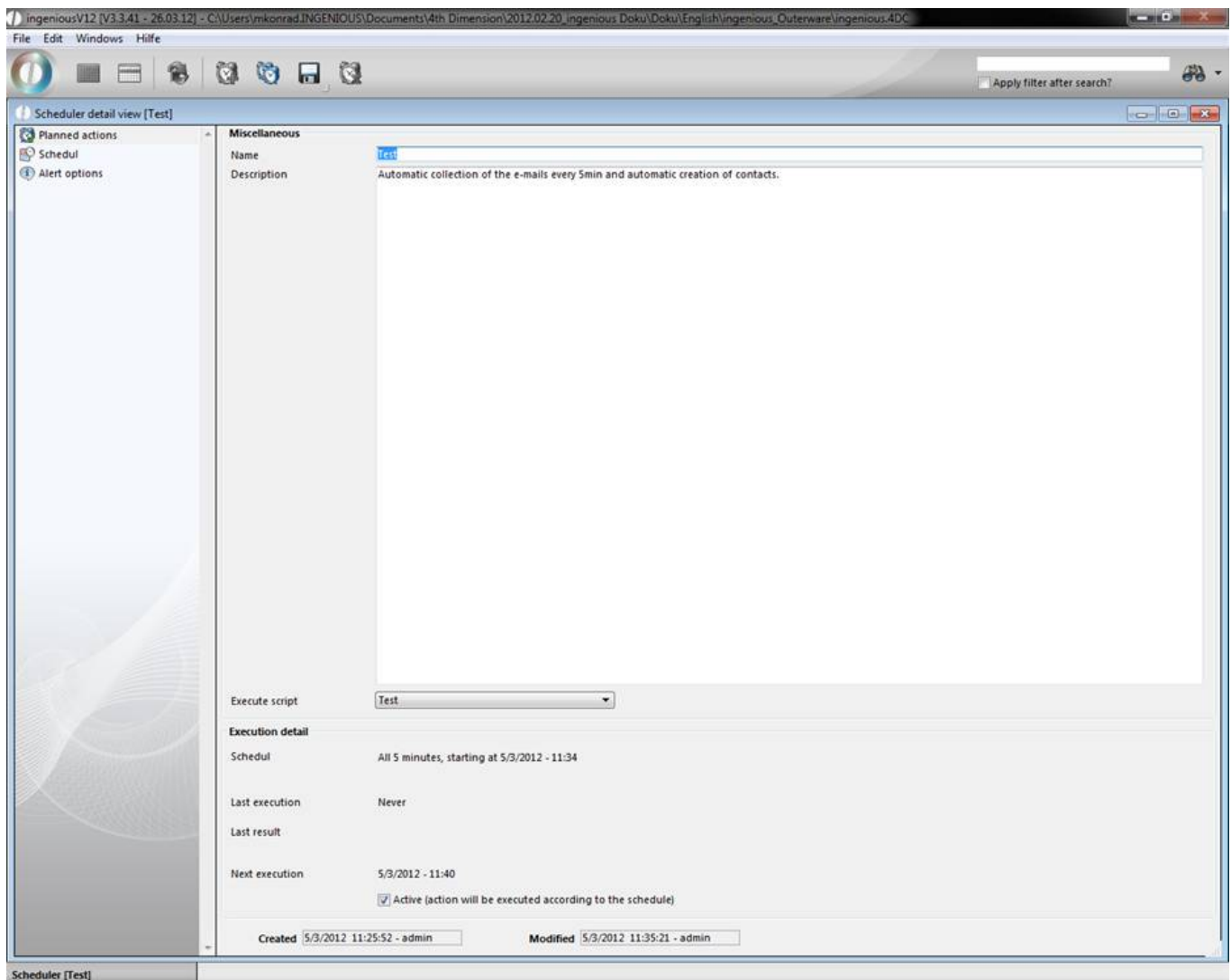
Then the scheduler is listed in the main menu in "Others".



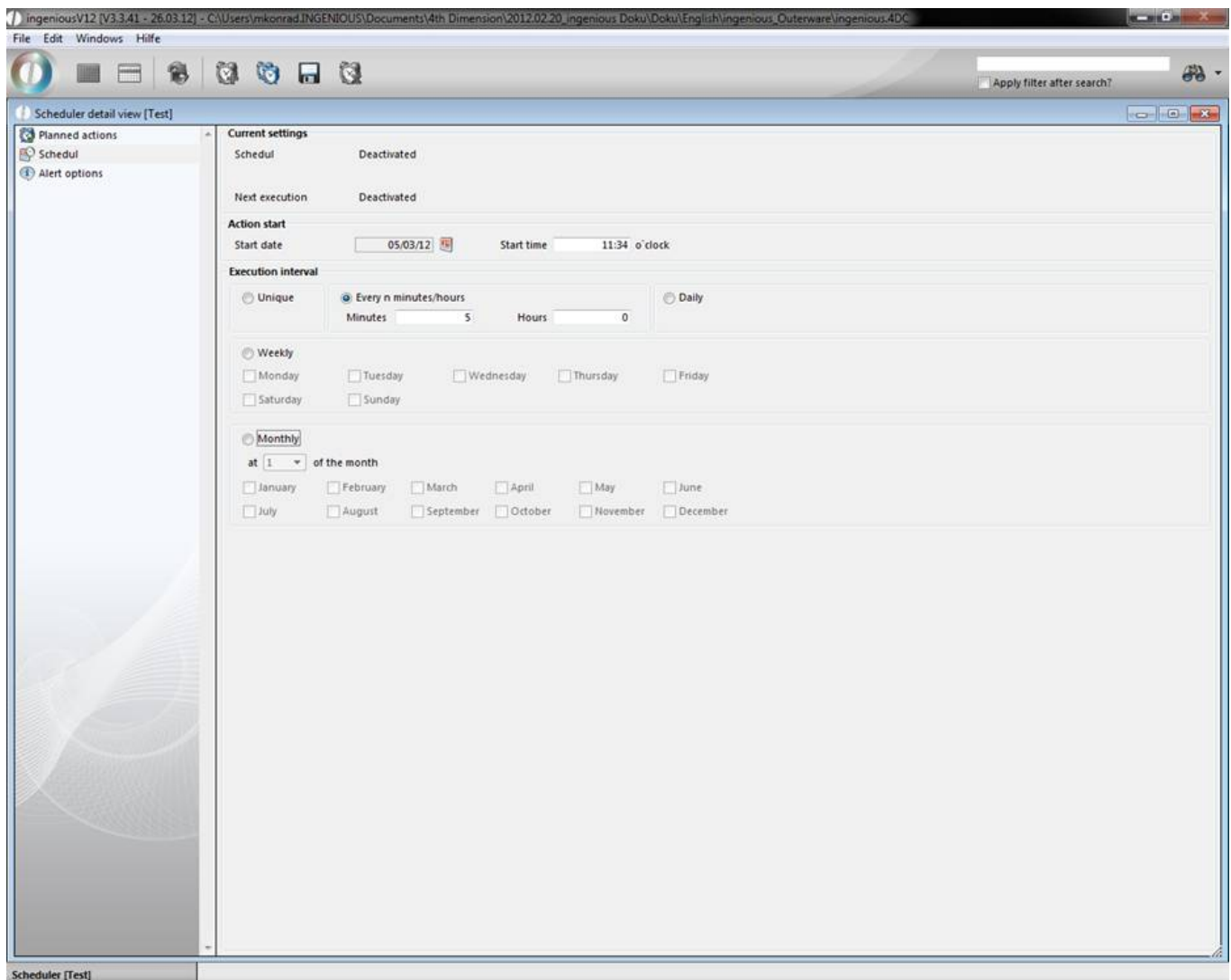
When you click on scheduler a list view will open up where all of your current controlled scripts are listed. In the selection area you have several filter functions. In the bottom area you see log entries with action start, action end, and the result of the script execution.



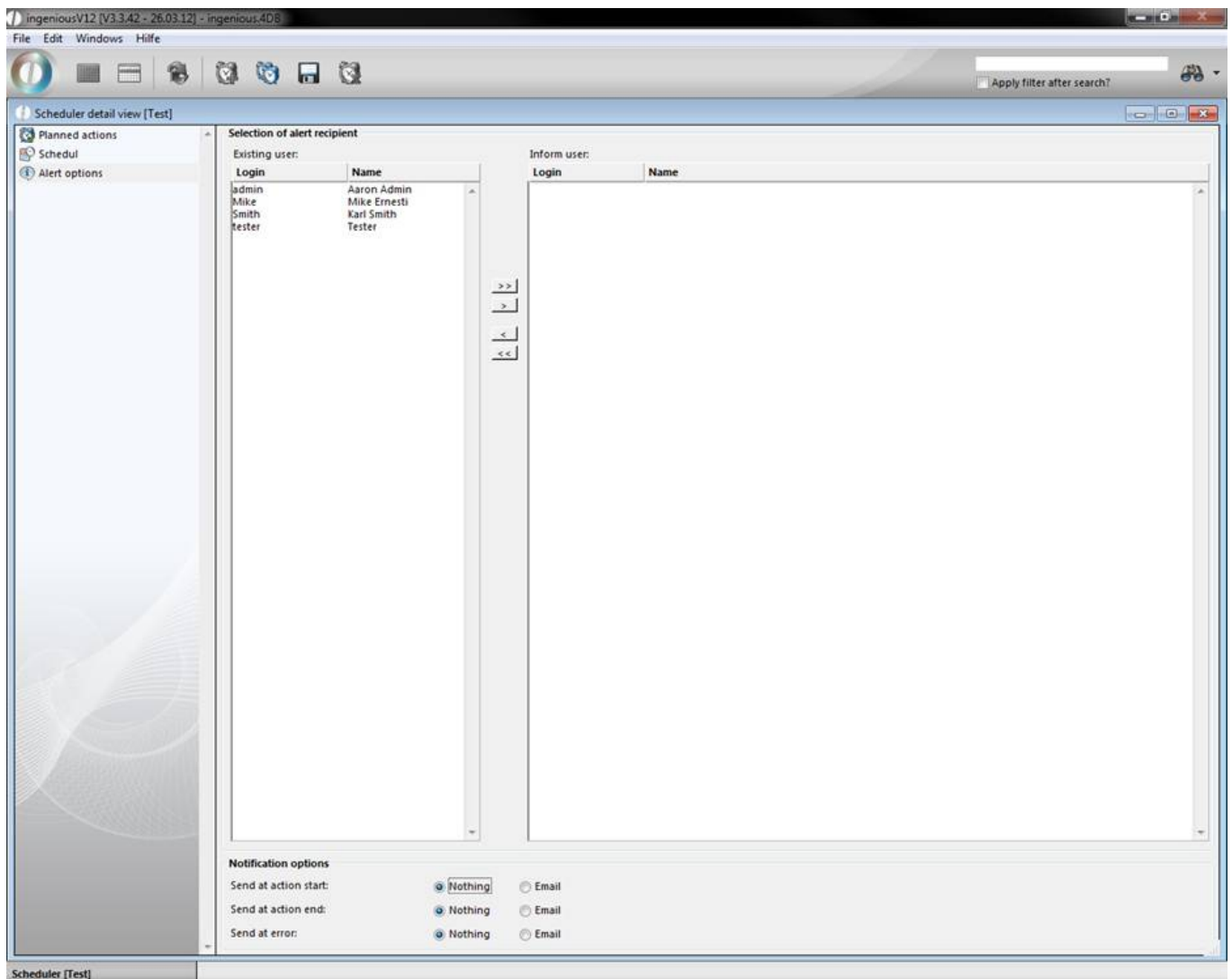
A new action can be added by clicking  and modified by double clicking it in the list view. This will open up the scheduler detail view. In the category "planned actions" you can enter name and description of the action. In the pop up field "Execute script" you choose the desired script that will be executed. The listed scripts are deposit in the free data manipulation in the stored procedures. In the displayed example a script should be executed, which collects e-mails and possibly creates a new contact. The employees of the Ingenious GmbH will help you will be happy to help you with the creation of individual scripts. In the bottom area you find the details of the execution of the action (schedule, result, time of the last and the next execution). The settings for the schedule you define in the next same-named category.



Here you can define the action start date with date and time and the execution interval of the script. In this example the scrip execution should happen every 5 minutes.

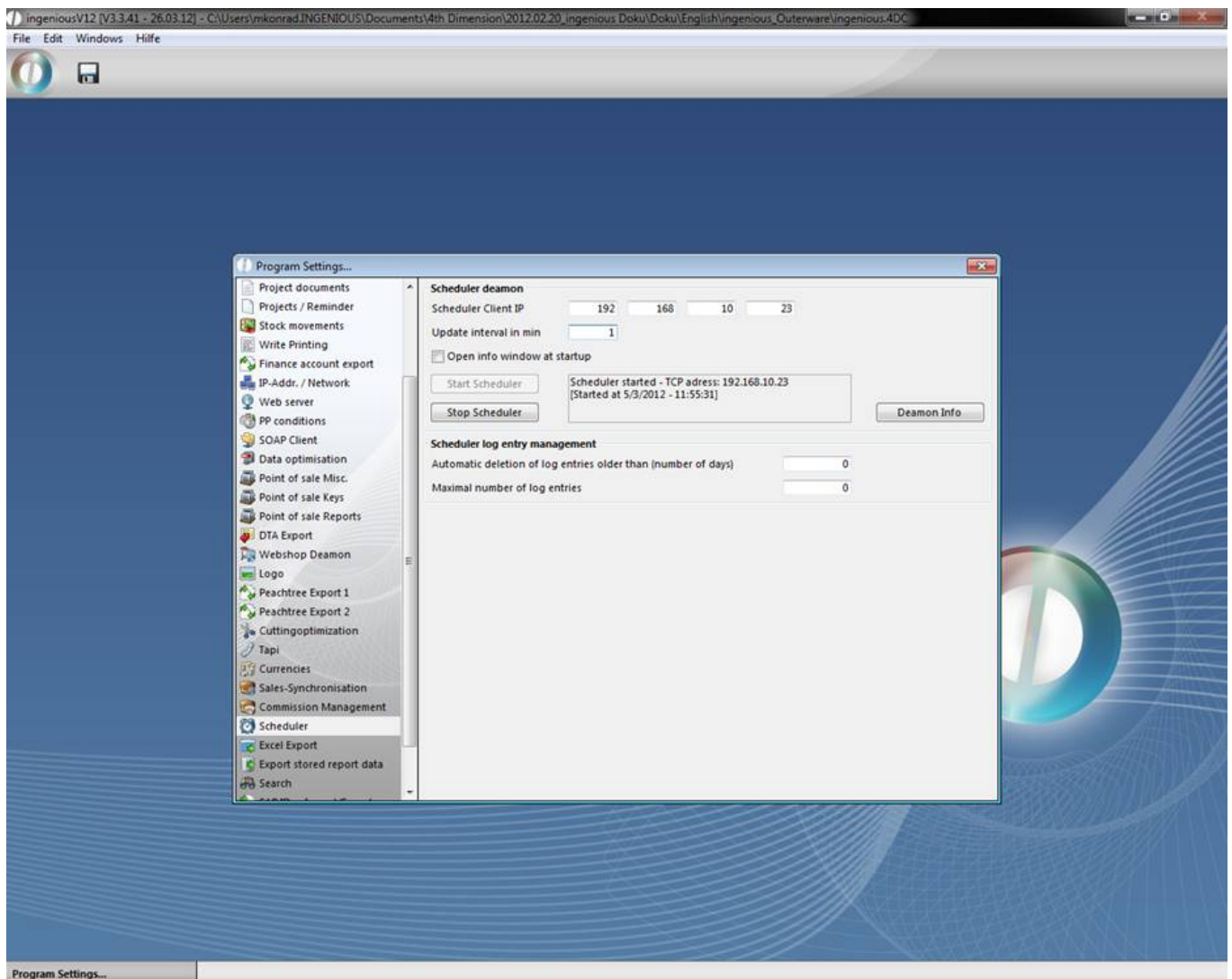



In the category “Alert options” you have the opportunity to let one or more users be notified per e-mail when an action starts, ends or the execution was not successful.

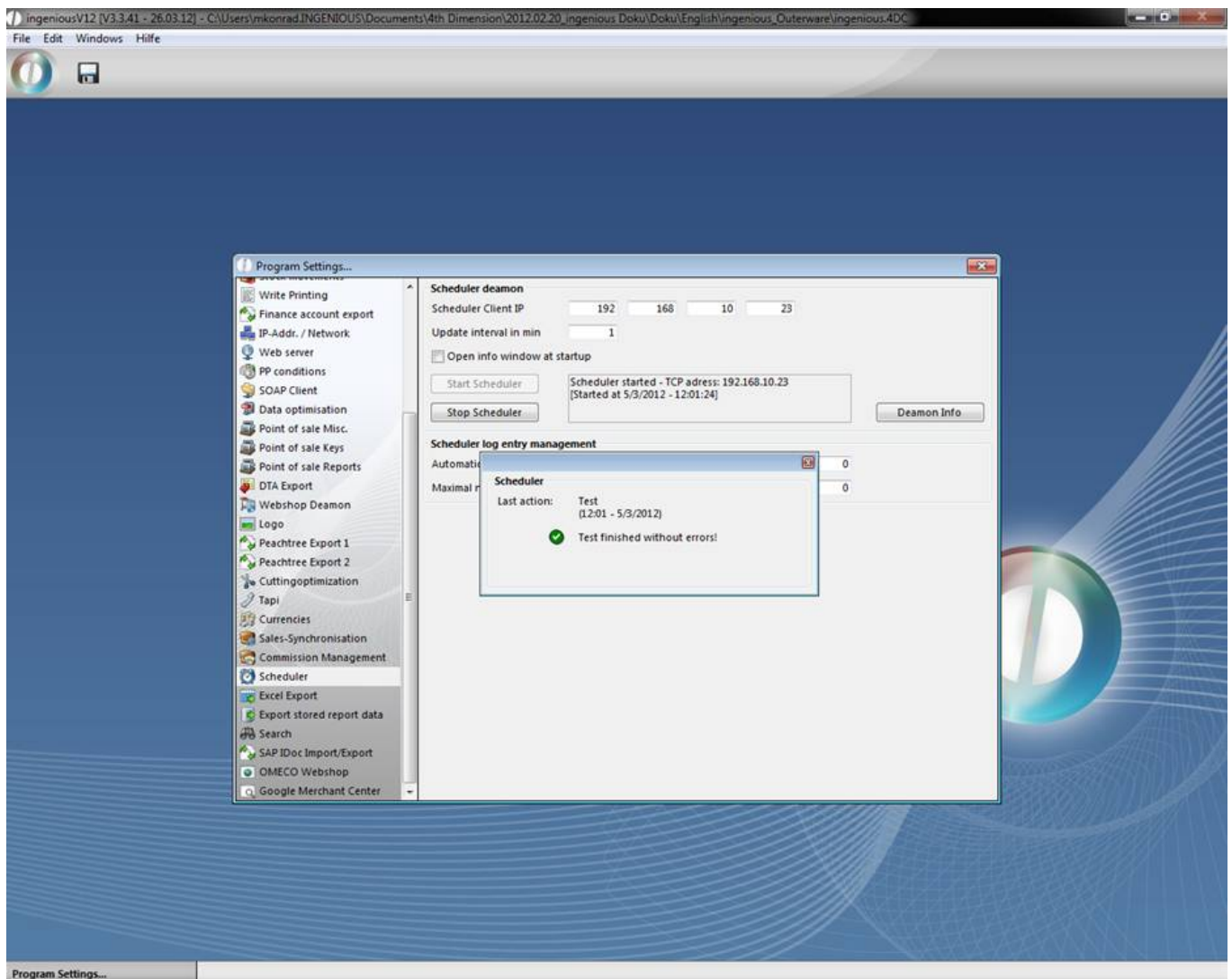


Further configurations for the scheduler you can set in the program settings. Here you define the IP of the client, for whom the script should be executed. Besides Ingenious.V12 can display an information window, which will be opened on every start and update it every x minutes. If necessary you can stop and restart the scheduler in the program settings. In the log entry management you can set the number of maximum displayed log entries and the time when they will be deleted.

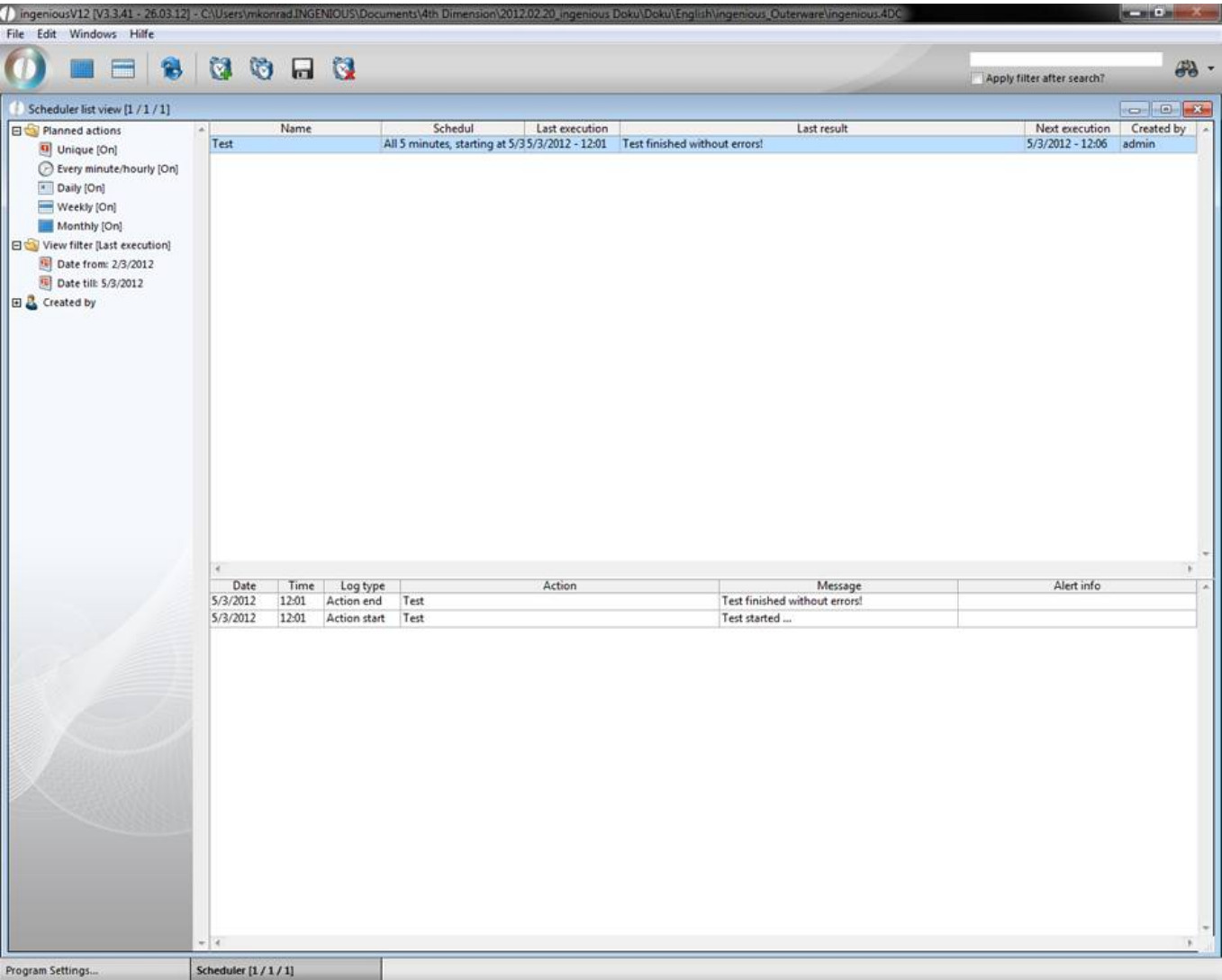
In the program settings, you will find three columns for the organization of the point of sale operation: "Point of sale general", "Point of sale keys" and "Point of sale reports", where you can deal with the desired walk-in customer and the appropriate point of sale settings. In the case that the three areas are not displayed in your settings, you must clear all point of sale rights for your user in the user administration.



When you click on the button  the information window of the scheduler with the details of the current action will be displayed.



Also in the scheduler the new actions are noted.



8 ingenious WEB

8.1 ingenious WEB

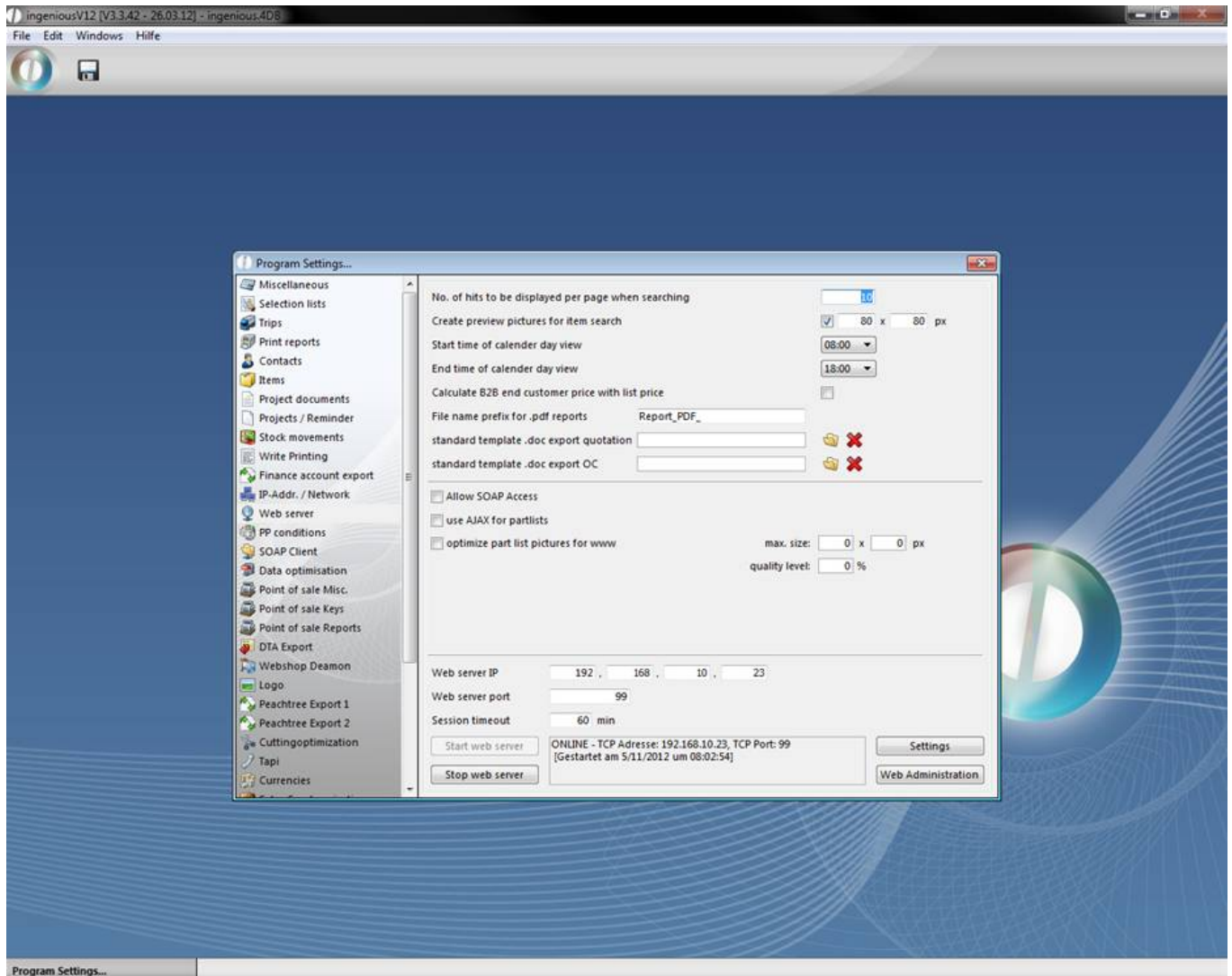
Ingenious.WEB contains a sales rep web access for employees and a web shop for customers and specialist dealers. For every user type several views with different information can be created. In this way the sales reps are not only able to calculate a product, but also they can manage their dates, create orders and be able to inform their customers about delivery date, open items, etc. Also complex analyses about the customers operating numbers can be displayed in a browser.

Ingenious.WEB contains four different functions and views:

1. Web access for sales reps
2. Web access for mobile devices (mobile phone, ...)
3. Web shop B2C (= business to customer) – salesman to end customer
4. Web shop B2B (= business to business) – salesman to wholesaler/reseller (can only view own data, limited input opportunities, address)

8.2 Establish web access

To be able to start ingenious.WEB, you have to enter in the program setting in the category "Web-Server" the IP of the computer, which will provide the service, and click on the button "Start web server".



When you click the button “Web Administration” a window will open up, where you find all necessary templates for ingenious.WEB.

In the 4D client directory of the computer, which operates as the web server, the folder “WebFolder” has to be located. It contains the picture folder “images”, and necessary script and stylesheet files.

By clicking “Start web server” and “Stop web server” you can control the web server, when the following requirements are fulfilled:

- Module right “XML Supplier module” or “Web Access” available
- IP-address of the computer corresponds to the one entered in “Web Server IP”

When you click on “Web Administration” you reach the configuration for the html system sites. The following sites have to be created containing content:

Folder Sales rep Module (Modul Aussendienst)

“calendardetailnew”

“calendarmain”

“calendarmonth”

“calendarweek”

“genericerror”

“kundendetail”

"kundenmain"

"login"

"reporterror"

"reportmain"

"reportmain_pdf"

Folder "General B2B" (Allgemein B2B)

"B2B_ItemConfig"

"B2B_Login"

"B2B_Main"

"B2B_noLogin"

"B2B_ProjectDetail"

"B2B_ProjectList"

"B2B_segment_article_menu"

"B2B_segment_header1"

"B2B_segment_header2"

"B2B_segment_left_menu"

To call up the web sites, in the browser the IP address resp. domain/URL has to be entered, followed by the corresponding start site:

Web Access for sales rep employees: [Your IP address]/?webform=login

Web Access for mobile devices: [Your IP address]/?webform=login&mobil=true

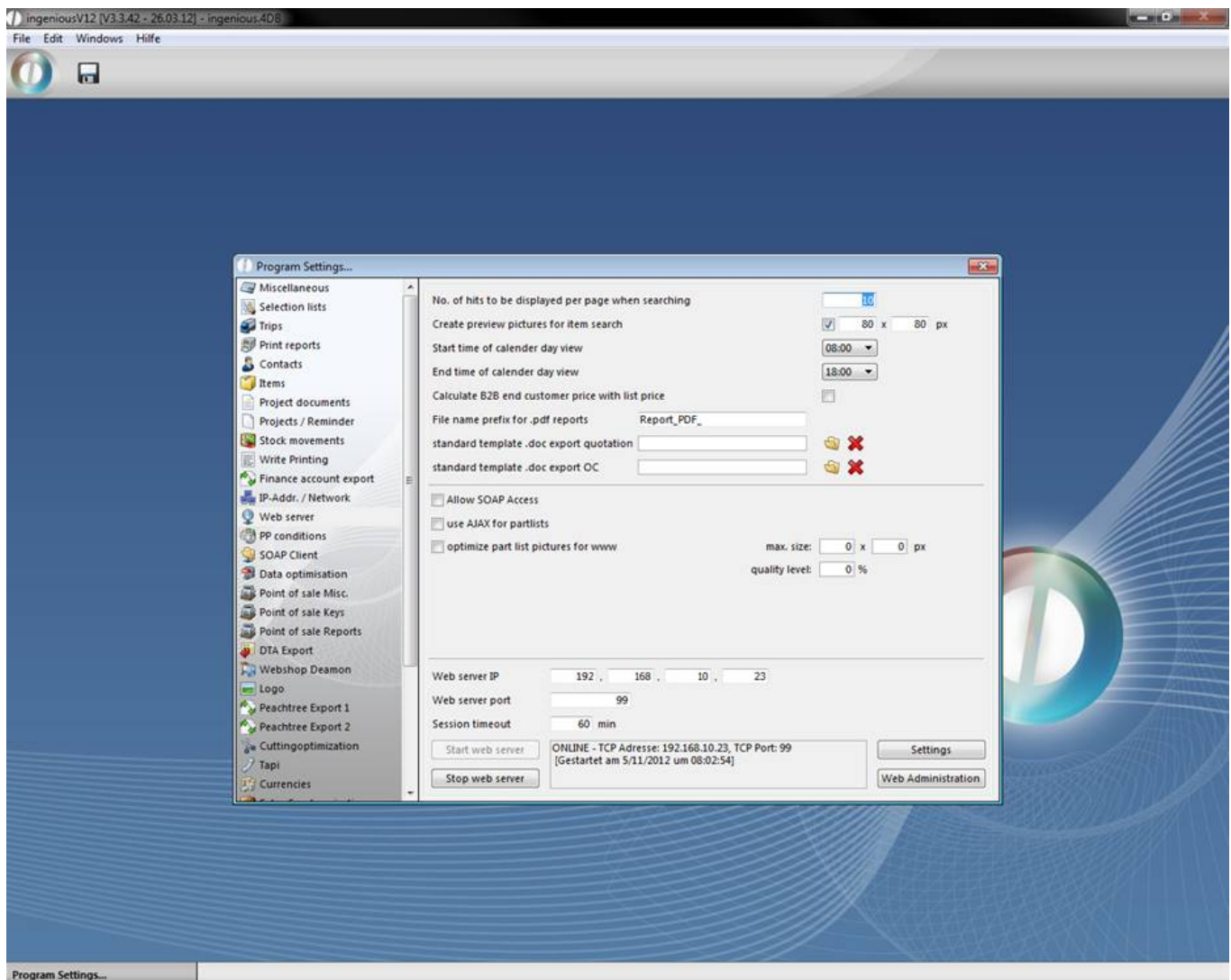
Web shop B2C: [Your IP address]/b2c/

Web shop B2B: [Your IP address]/b2b/

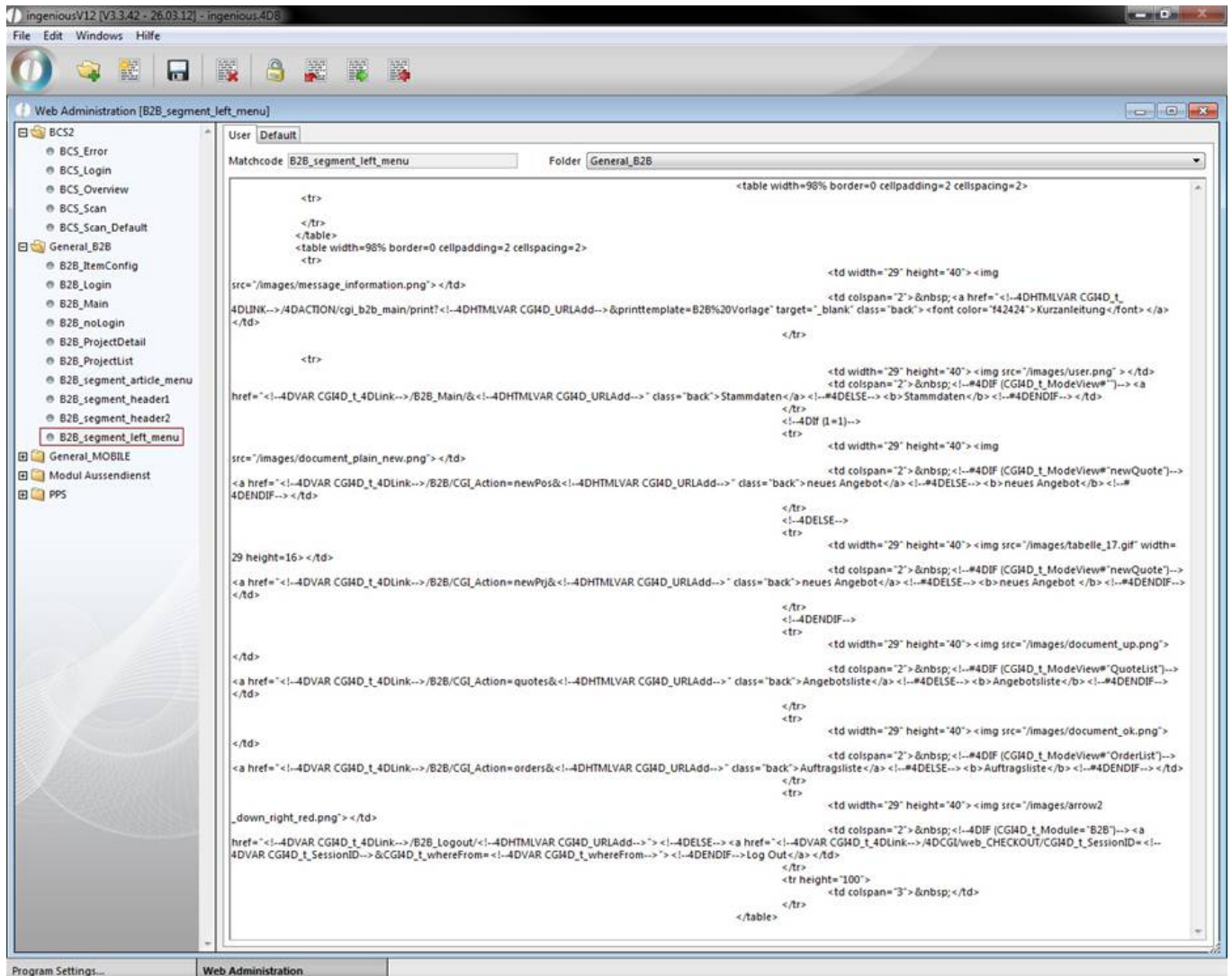
8.3 Configuration of the web access

Basics

To adjust the content of the web access to your needs, you can modify the layout (= html sites of the web access). In the program settings in the category "web server" you find a button "Web Administration". This will open up a window, where you can modify the look of your web access.



In this example in the folder "Genberal_B2B" you can find "B2B_segment_left_menu", which contains the form for the left menu in the B2B View of the web access.



Web Administration in ingenious.V12

The basics of the html code for your web view are the following:

Static text:

```
{{core data}}
```

It is possible to output static text in multiple languages. To use this feature you have to enter static text in double braces `{{Your text}}`. If you don't need multiple languages you can write static text without braces.

To display the content of a record:

```
<!--#4DVAR [Kontakte]WS_Individuell_Text_1-->
```

To refer to another intern site of the web view (in this case, the B2B start screen):

```
<!--4DVAR CGI4D_t_4DLink-->/B2B_Main/&<!--4DHTMLVAR CGI4D_URLAdd-->
```

To load a segment:

```
{GET_HTML_SEGMENT("B2B_segment_left_menu")}
```

To display text dependent on variables:

```
<!--4DIF ([Kontakte]Individuell_Text_3="4")--> (used for contact groups to display different products)
<!--4DELSE-->
<!--4DENDIF-->
```

Source paths of files – for example a picture:

```
src="/images/ document_plain_new.png " alt"">
```

Forms:

```
<form name="form1" method="post" action="<!--#4DVAR CGI4D_t_4DLink-->/4DACTION/cgi_B2B_ItemConfig">
```

Open a part list:

```
<a href="<!--#4DVAR CGI4D_t_4DLink-->/B2B/CGI_Action=newpos&<!--4DVAR CGI4D_URLAdd--
>&CGI4D_t_selection_key_field=example_list">
```

Print a document:

```
onClick="window.open(href='<!--4DHTMLVAR CGI4D_t_4DLINK-->/4DACTION/cgi_b2b_segment_left_menu/print?<!--4DHTMLVAR CGI4D_URLAdd-->&printtemplate=Quotation_DE')"
```

Variables

Variable	Beschreibung
CGI4D_t_partlist_key_field	ID of the part list item
CGI4D_t_selection_key_field	Name of the desired part list
CGI4D_t_pos_key_field	ID of a new item
CGI4D_t_error	Error message
CGI4D_t_4DLink	""
CGI_B2B_isPartlist	"true", is item is a part list
CGI4D_URLAdd	Contains hidden variables
CGI4D_t_ArtikelText	Item text
CGI4D_t_ArtikelMenge	Item quantity
CGI4D_t_Artikel_AbmessungTyp	Unit of the item
CGI4D_t_Artikel_AbmessungX	X measurement of the item
CGI4D_t_Artikel_AbmessungY	Y measurement of the item
CGI4D_t_Artikel_AbmessungZ	Z measurement of the item
CGI_StkLi_MSG	Message in the part list
CGI_StkLi_ZuschlagP	Add % addition in the cusomter calculation
CGI_StkLi_ZuschlagE	Add € addition in the cusomter calculation

CGI_StkLi_Netto	Purchase price of the sales item
CGI_StkLi_Calc	Part list calculation
CGI_StkLi_Netto_VK	Sales price of the calculated item (excl. VAT)
CGI_StkLi_Brutto_VK	Sales price of the calculated item (incl. VAT)
CGI_B2B_ArtikelSuche	"true", when number of found items is not 1
CGI4D_t_nextField	Next active field in the part list
CGI_B2B_Angebot_Bezeichnung	Document name
CGI4D_t_pos_input	"A" when item is an article, "R" when it is a rebate
CGI_B2B_Angebot_EK	Sum of the purchase prices of the project
CGI_B2B_Angebot_VK	Sum of the purchase prices of the project (excl. VAT)
CGI_B2B_Angebot_MwSt	VAT of the project
CGI_B2B_Angebot_VK_Brutto	Sum of the sales prices of the project (incl. VAT)
CGI4D_t_ModeView	To distinguish between price list and purchase list
CGI_StkLiVisible	Field with all lines of a part list, „true“, when it is visible.
CGI_StkLiCnt	Field containing a (his own) item
CGI_StkLiBColor	Field whose background color corresponds to the line color of the part list
CGI_StkLiFColor	Field whose foreground color corresponds to the line color of the part list
CGI_StkLiBezeichner	Field containing the names of all lines of the part list
CGI_StkLi_Width1	Width of the part list – divided line 1
CGI_StkLi_Width2	Width of the part list – divided line 2
webCurrentSelection	Current selection
WebCurrentPage	Number of the current selected pages
webPages	Number of all sites according to the result
webFehlerLogin	Login error
webSearchValue	Input value of the searched project

Actions:

document.stkli.submit()

Strings:

<!--4DVAR String(Round(CGI_StkLi_Brutto_VK;2);<>frmtStandard2)-->

Buttons:

Button	Beschreibung
BTN_Partlist_Abort	Abort part list calculation

BTN_Partlist_Calc	Calculation of the part list
BTN_Partlist_UpdatePos	Update calculated article in the project
BTN_Partlist_AddPos	Add calculated item to project
BTN_KON_Save	Save changes of contact data
BTN_AddPos_D1	Add direct item as piece item
BTN_AddPos_D2	Add direct item as meter item
BTN_AddPos_D3	Add direct item as square meter item
BTN_AddPos_Rab	Add abatement
BTN_AddPos_LSum	Add running sum
BTN_AddPos_ZSum	Add subtotal
BTN_AddPos_Text	Add free text (no price)
BTN_AddPos_Header	Add headline
BTN_Save	Save project
BTN_Delete	Delete project
BTN_AddItem	Add item from catalogue
BTN_Finalise	Finalize project
BTN_Print	Print project

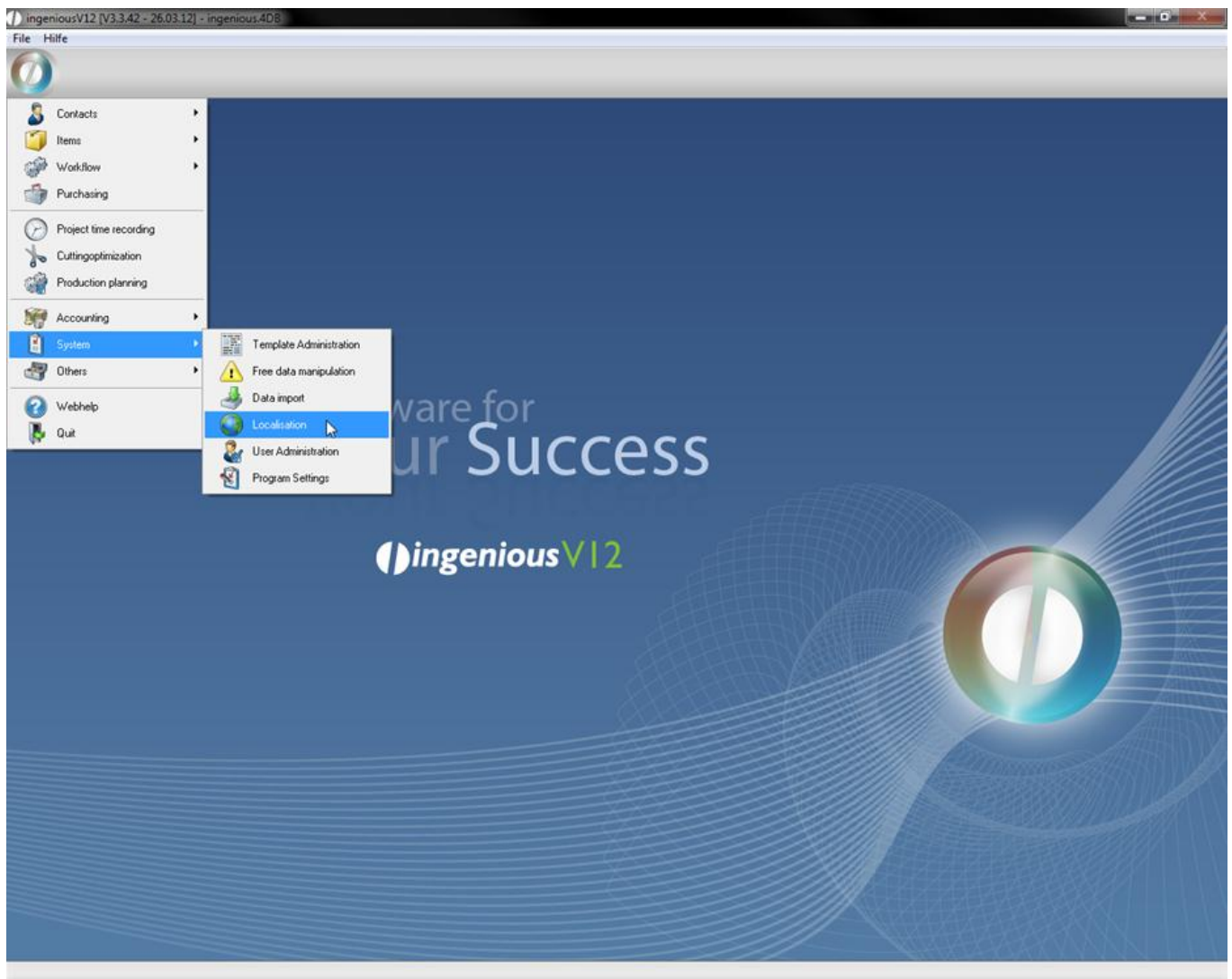
Commands in part lists:

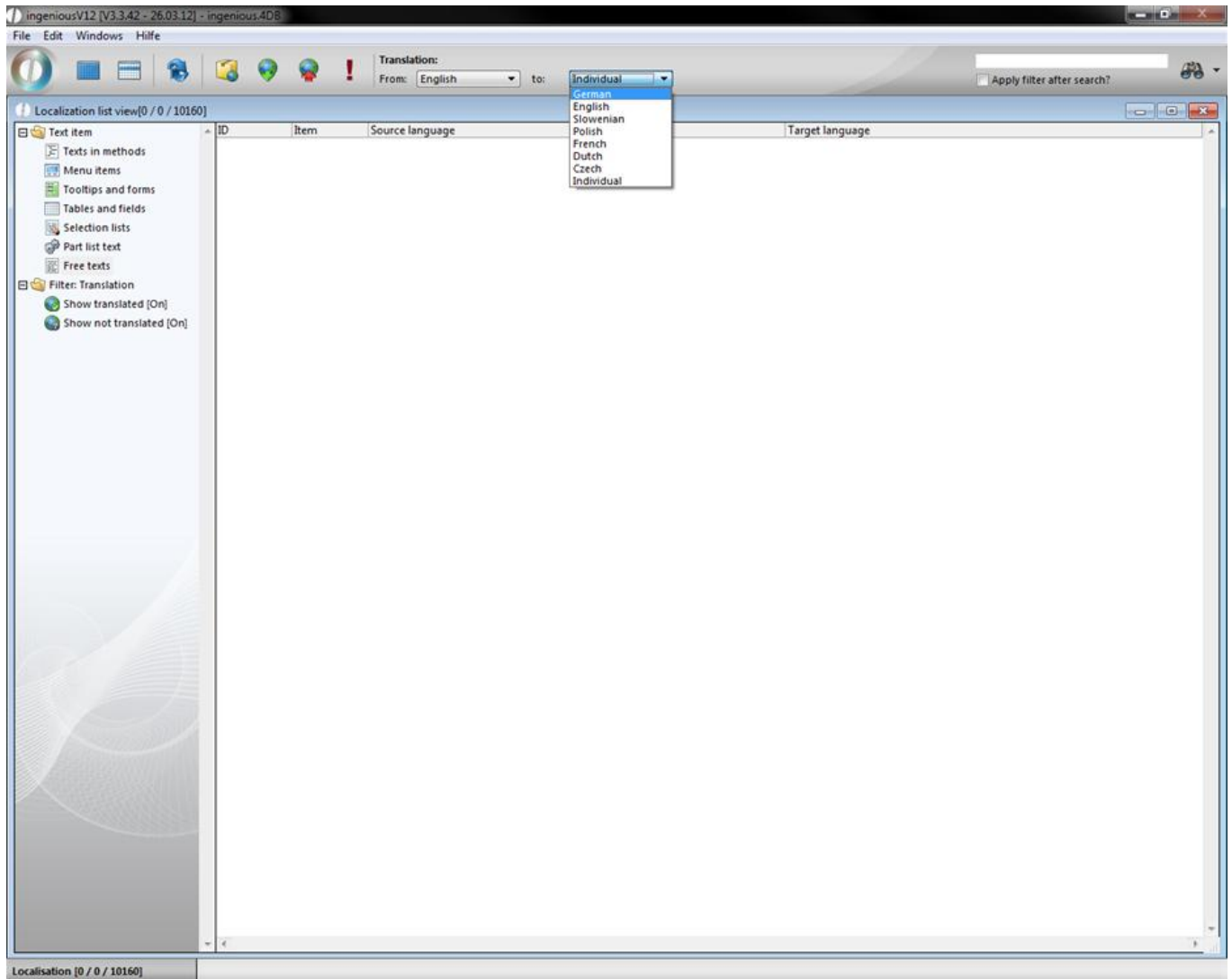
HTML template: B2B_segment_controls AJAX

Javascript files: Jscript/Control_Color.js, Control_Picture.js, Control_PicSlider.js, Control_Slider.js, Control_Toggle.js, Set_Fokus.js

Control	Variable in Web-Template
1. Headline	CGI_StkLiBezTitle{CGI_StkLiCnt}
2. Description	CGI_StkLiBezDesc{CGI_StkLiCnt}
3. Picture	CGI_StkLiBezPict{CGI_StkLiCnt}
4. Radio buttons	---
5. Picture buttons	CGI_StkLiDropdownPics{CGI_StkLiCnt}{CGI_StkLiDropdownCnt}
6. Color picker	CGI_StkLiDropdownColors{CGI_StkLiCnt}{CGI_StkLiDropdownCnt}
7. Slider	CGI_StkLiBezSliderMin{CGI_StkLiCnt} CGI_StkLiBezSliderMax{CGI_StkLiCnt} CGI_StkLiBezSliderStep{CGI_StkLiCnt}
8. Picture slider	CGI_StkLiDropdownPics {CGI_StkLiCnt} {CGI_StkLiDropdownCnt} CGI_StkLiDropdownPicDesc {CGI_StkLiCnt} {CGI_StkLiDropdownCnt}
9. Segment	---
10. HTML segment	CGI_StkLiBezCode{CGI_StkLiCnt}

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Localization

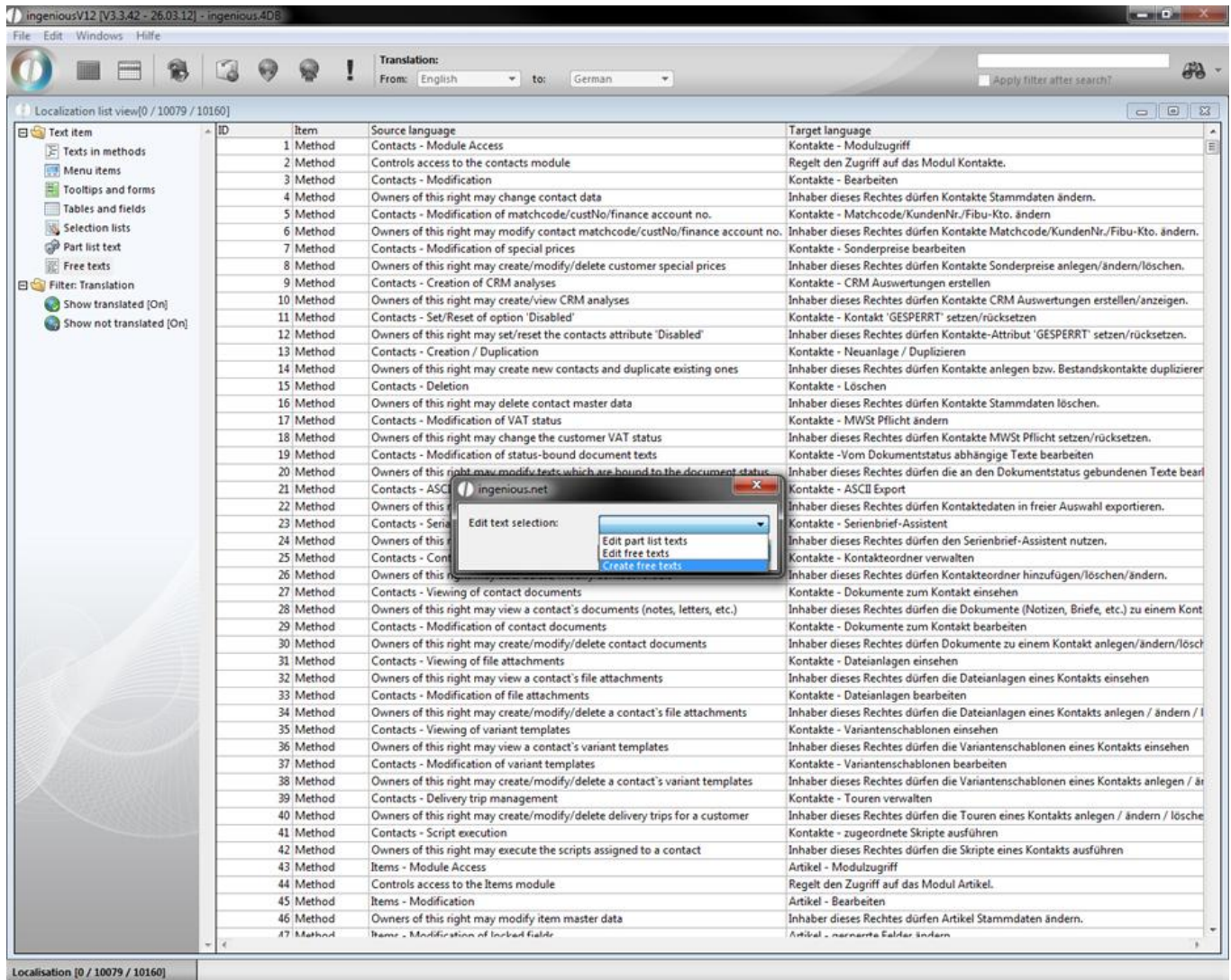
In the category "Free texts" you can translate the static texts of your web view in several languages. For a better understanding in the following practice we will keep to our example of the left menu.

Practice creating multilingual static texts

In the following we want to translate the menu items "News", "Home", "New Quote", "Quote List", "Order List" and "Log Out" to a new language (German).

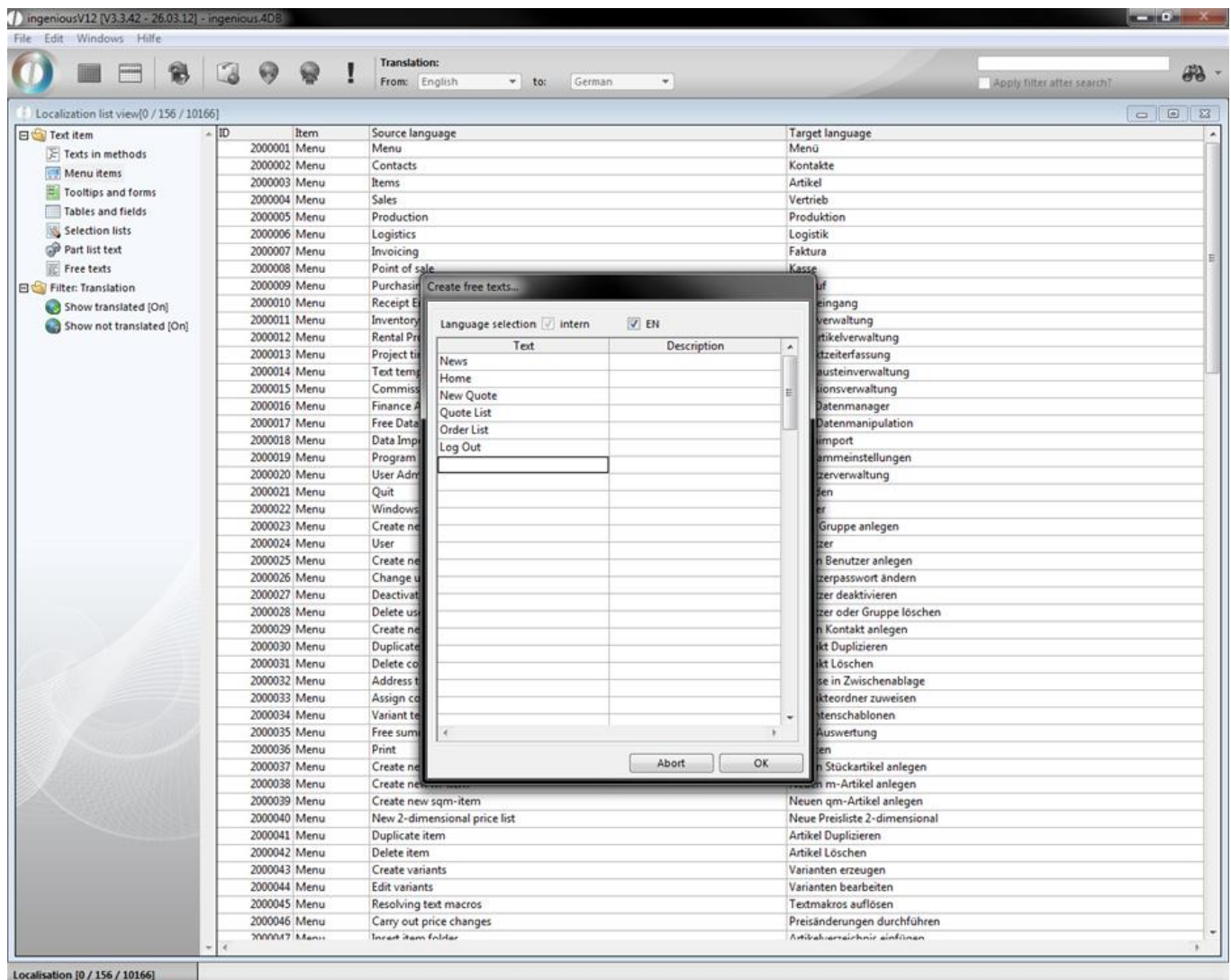
Open the Localization module and click on free texts in the selection list.


Now choose the desired translation in the upper navigation. In our case: "From English to German". To create a new free text and translate it, click on the button  "modify free translations" and select in the drop down menu the option "create free texts".

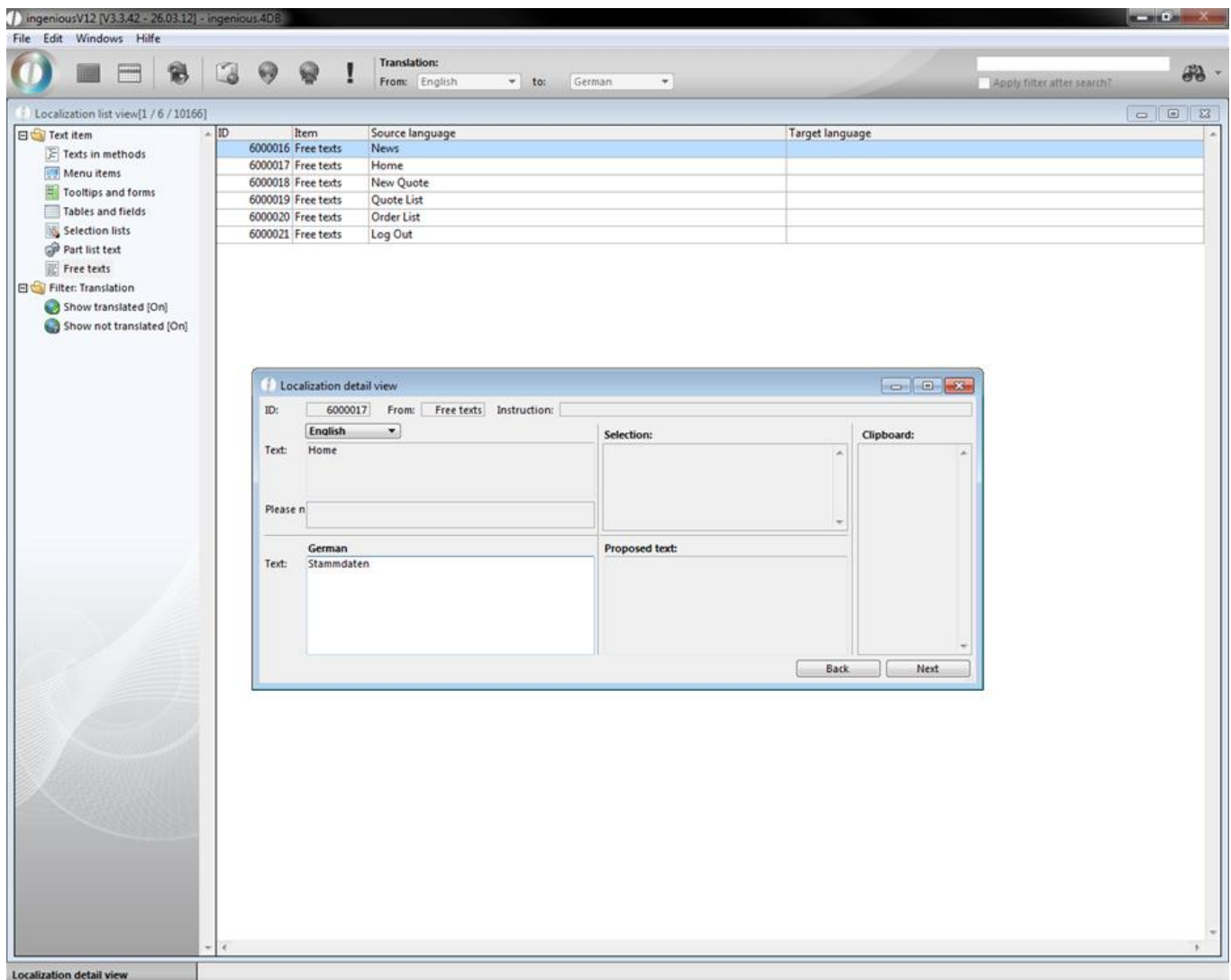


In the upcoming window you can enter the desired texts in English.

Now fill the fields with the menu entries "News", "Home", "New Quote", "Quote List", "Order List" and "Log Out" and check the field "EN". A click on "OK" will create the texts.



When you double click on an entry in the list view the modification window will open up, where you can translate the text. You can edit all menu entries successive by clicking the  button.



Now all your static texts like {{Home}} or {{New Quote}} are displayed in German when you select this language on the web access login screen.

A screenshot of the login form for 'ingenious.web'. The form has a green header. It contains three main sections: 'Login' with a user icon and the text 'Sonnenschein'; 'Passwort' with a key icon and a masked password '***'; and 'Sprache' with a globe icon and a dropdown menu. The dropdown menu is open, showing a list of languages: DE, DE, EN, FR, NL, CZ, SL, PL. Below the language dropdown, the word 'Passwort' is visible.

ingenious.WEB ✕

B2B

News	Firma	Ihr Ansprechpartner
Stammdaten	Susi Sonnenschein	Max Muster
Neues Angebot	Apfelweg 1	0341/226210
Angebote	D 01425 Testort	
Aufträge		

Warenkorb:
(0 Artikel, 0,00 €)

[Log Out](#)

8.5 Enable contacts for web access

Therewith your customers can use your created web service you have to enable the corresponding rights. Call up the contact detail view of any contact. In the menu entry "Web service" check the field "Allow Web Services" and enter the desired password in the field.

Here it is also possible to add a logo for your customer. This can be added to quotes, orders, etc. in the documents.

Also it is possible to preset the language of the customer. But every customer has the opportunity to change the desired language in the login screen again.

6.4. Web access for sales reps

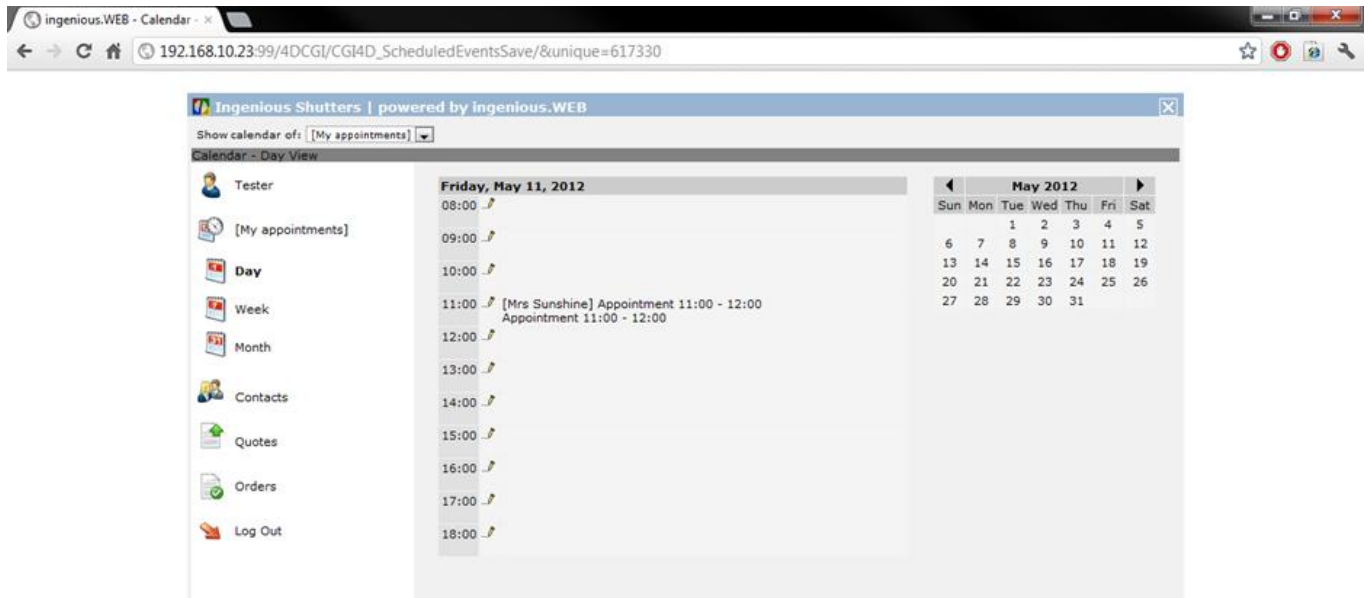
When you start the web access login and password of the employee will be requested.



The different modification possibilities in the web access are listed in the following:

Dates:

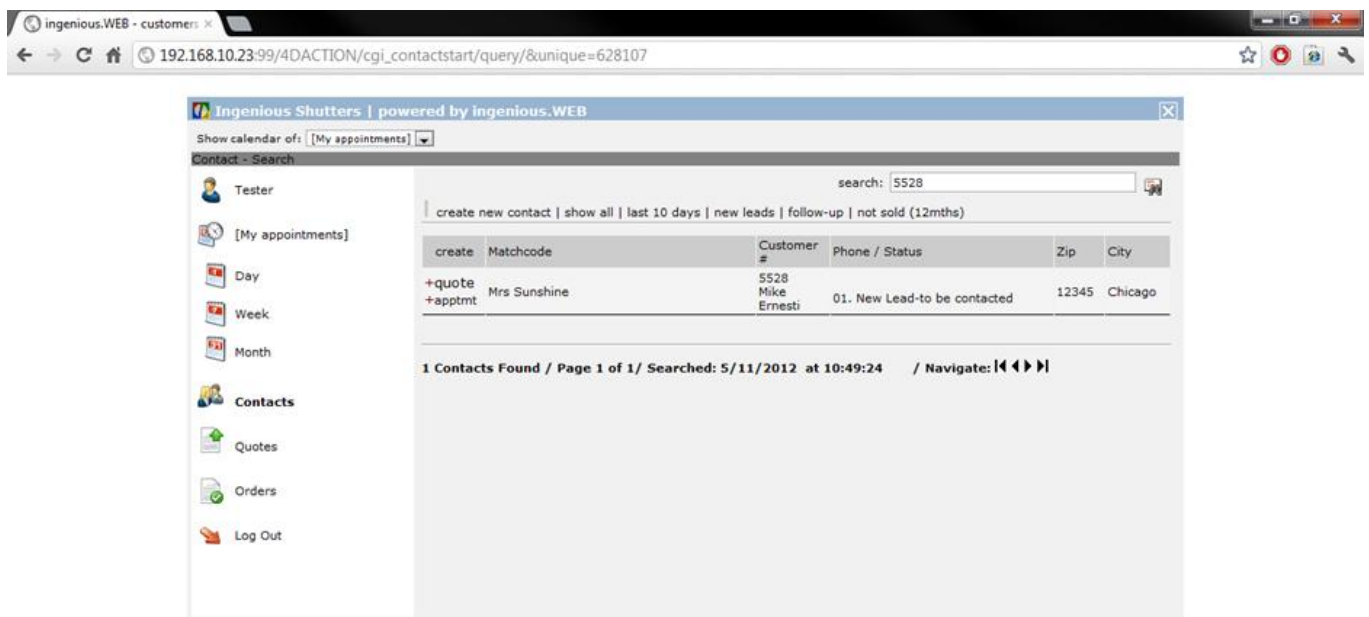
- Selection for single user or display all dates
- Toggle between day, week and month view
- Creation of dates with assignment to a representative and a customer
- Selection of a activity category
- Selection of the start time and the length in a quarter of a hour rhythm
- Opportunity to save the date as a note in the contact
- Duplicate dates



Date view – example: day view

Contacts:

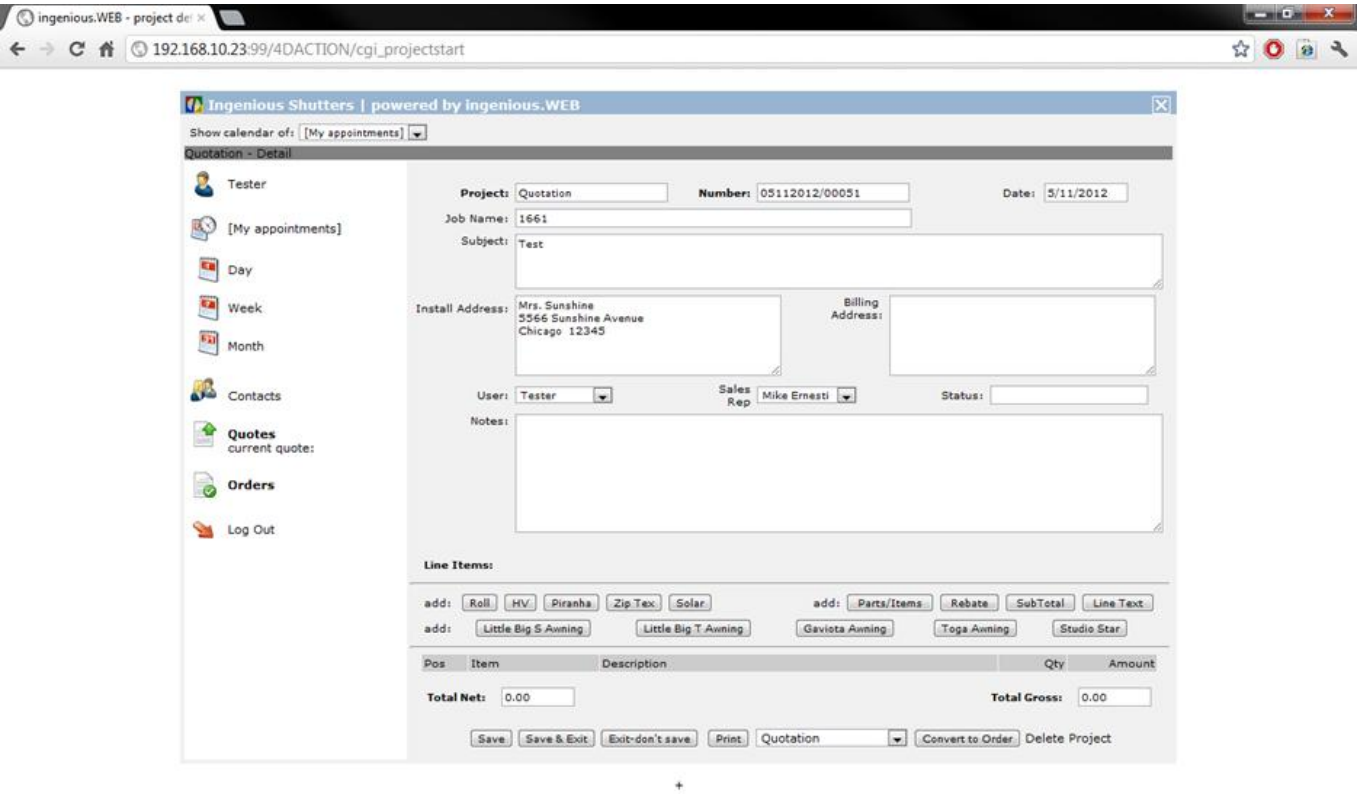
- Access to all contacts in the database
- Search function for names, matchcodes, customer number, postal code and city
- Direct connection to the date creation
- All general contact information: address, representative, telephone, fax, e-Mail, Web
- Information about payment practice, method of payment and delivery limit, opportunity to limit check
- Group membership and tour
- Note field



Contact list view

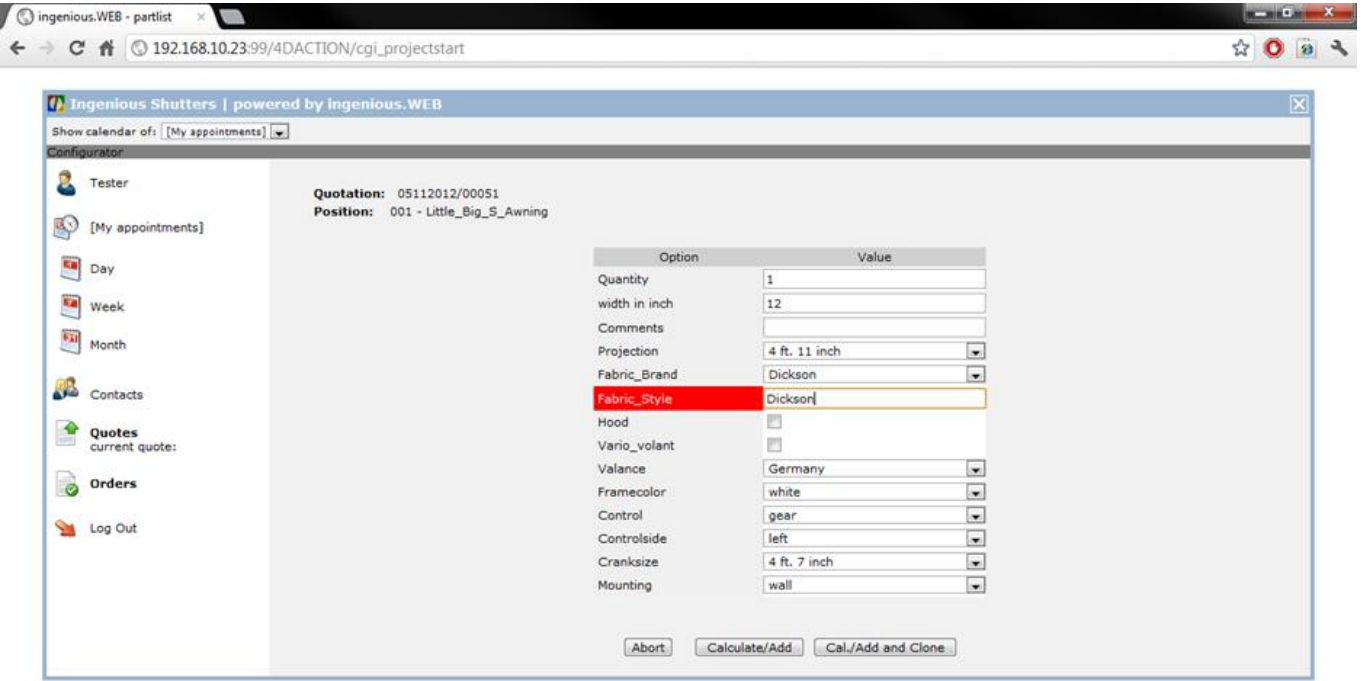
In the contact list view next to every contact you can find two links. With "Apptmt" you can create a new report or date or with "quote" a new quote.

When you create a new quote, you can fill the upper area like in ingenious.V12. The job name will be create automatically depending on the program settings.



Create example quote

In the lower area you can add items directly with the help of the article buttons. For example click on “Little Big S Awning”, and then the part list for this item will open up, where you can set the desired attributes.



Part list “Little big S awning”

When you click on “Calculate/Add” the item will be added to the project.

The screenshot displays the 'ingenious.SHUTTERS | powered by ingenious.WEB' application interface. The browser address bar shows '192.168.10.23:99/4DACTION/CGL_ProjectStkLi'. The application window has a title bar 'ingenious.SHUTTERS | powered by ingenious.WEB' and a close button. Below the title bar is a 'Show calendar of:' dropdown menu set to '[My appointments]'. The main content area is titled 'Quotation - Detail'. On the left is a sidebar with navigation links: 'Tester' (user icon), '[My appointments]' (calendar icon), 'Day' (calendar icon), 'Week' (calendar icon), 'Month' (calendar icon), 'Contacts' (people icon), 'Quotes current quote:' (quote icon), 'Orders' (checkmark icon), and 'Log Out' (logout icon). The main area contains a form for a quotation. At the top, it shows 'Project: Quotation', 'Number: 05112012/00051', and 'Date: 5/11/2012'. Below this are fields for 'Job Name: 1661' and 'Subject: Test'. The 'Install Address' is 'Mrs. Sunshine, 5566 Sunshine Avenue, Chicago 12345'. The 'Billing Address' is empty. The 'User' is 'Tester' and the 'Sales Rep' is 'Mike Ernesti'. The 'Status' is empty. There is a 'Notes' section with a text area. Below the notes is a 'Line Items' section. It has two rows of buttons: 'add: Roll, HV, Piranha, Zip Tex, Solar' and 'add: Parts/Items, Rebate, SubTotal, Line Text'. Below these are buttons for 'add: Little Big S Awning, Little Big T Awning, Gaviota Awning, Toga Awning, Studio Star'. A table lists the line items:

Pos	Item	Description	Qty	Amount
001	Little_Big_S_Awning	Retractable awning type "little big s" with 4 ft. 11 inch projection - Fabric: Dickson Style: Dickson - Valance: Germany - Frame color: white - Control: gear side: left - Mounting brackets: wall - Cranksize 4 ft. 7 inch	1	2,491.55

Below the table, it shows 'Total Net: 2,491.55' and 'Total Gross: 2,491.55'. At the bottom are buttons: 'Save', 'Save & Exit', 'Exit-don't save', 'Print', 'Quotation' (dropdown), 'Convert to Order', and 'Delete Project'.

When you click on the item position, the detail view will open up and you can modify or delete the item.

ingenious.WEB - project de

192.168.10.23:99/4DACTION/cgi_projectstart/edit?CGI4D_t_sessionID=201205111044380006113410000020898&CGI4D_t_whereFrom=ProjectManager&C

Ingenious Shutters | powered by ingenious.WEB

Show calendar of: [My appointments]

Quotation - Detail

Tester

[My appointments]

Day

Week

Month

Contacts

Quotes
current quote:

Orders

Log Out

Project: Quotation Number: 05112012/00051 Date: 5/11/2012

Job Name: 1661

Subject: Test

Install Address: Mrs. Sunshine
3566 Sunshine Avenue
Chicago 12345

Billing Address:

User: Tester Sales Rep: Mike Ernesti Status:

Notes:

Line Items:

add: Roll HV Piranha Zip Tex Solar add: Parts/Items Rebate SubTotal Line Text

add: Little Big S Awning Little Big T Awning Gaviota Awning Toga Awning Studio Star

Pos	Item	Description	Qty	Amount
001	Little_Big_S_Awning	Retractable awning type "little big s" with 4 ft. 11 inch projection - Fabric: Dickson Style: Dickson - Valance: Germany - Frame color: white - Control: gear side: left - Mounting brackets: wall - Cranksize 4 ft. 7 inch	1	2,491.55

Item: Little_Big_S_Awning

Description: Retractable awning type "little big s" with 4 ft. 11 inch projection
- Fabric: Dickson Style: Dickson - Valance: Germany

Qty: 1 Size: 12

2,491.55 Price: 2,491.55 Total Net: 2,491.55 Total Gross: 2,491.55

Save Line Item Product Configuration Exit - don't save Delete Line Item

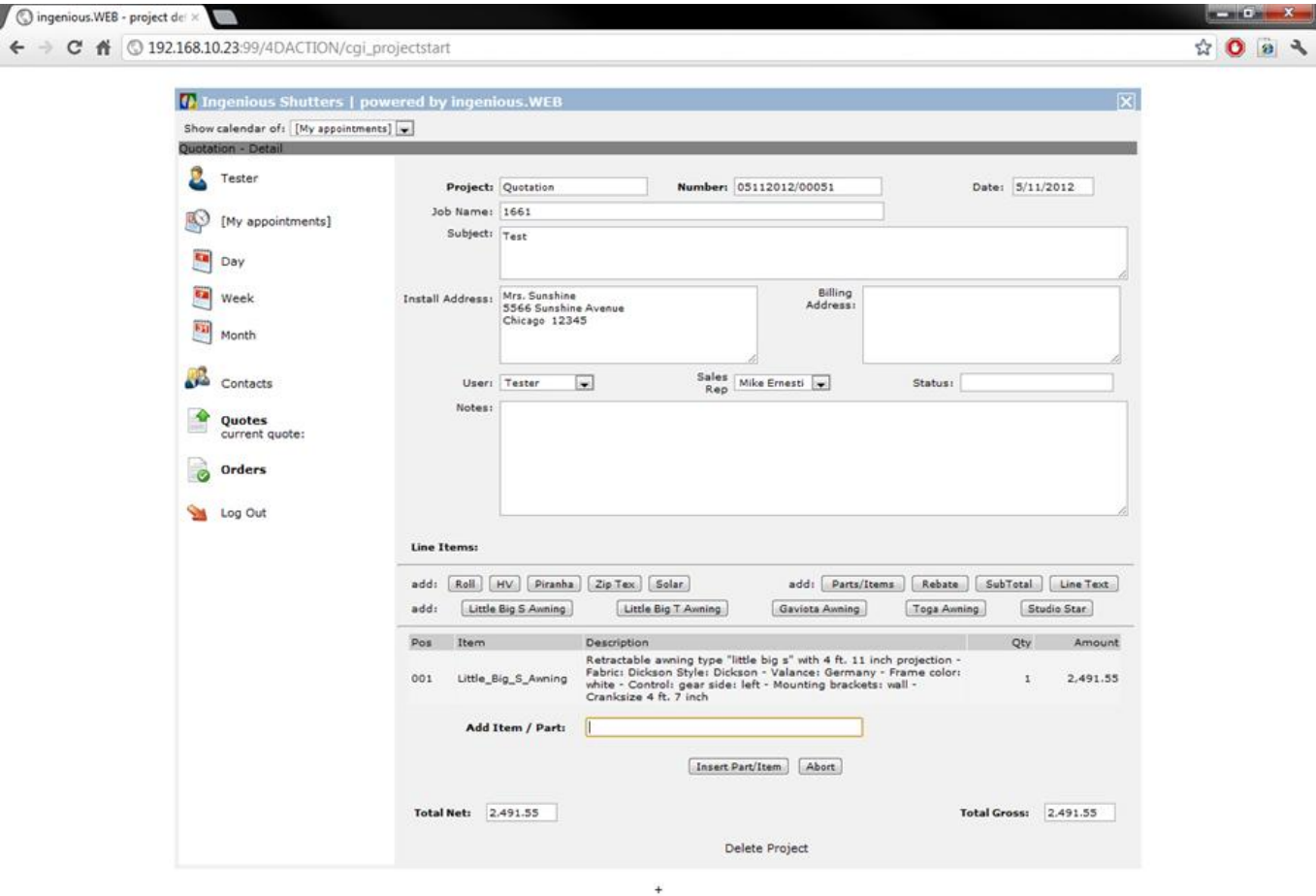
Total Net: 2,491.55 Total Gross: 2,491.55

Delete Project

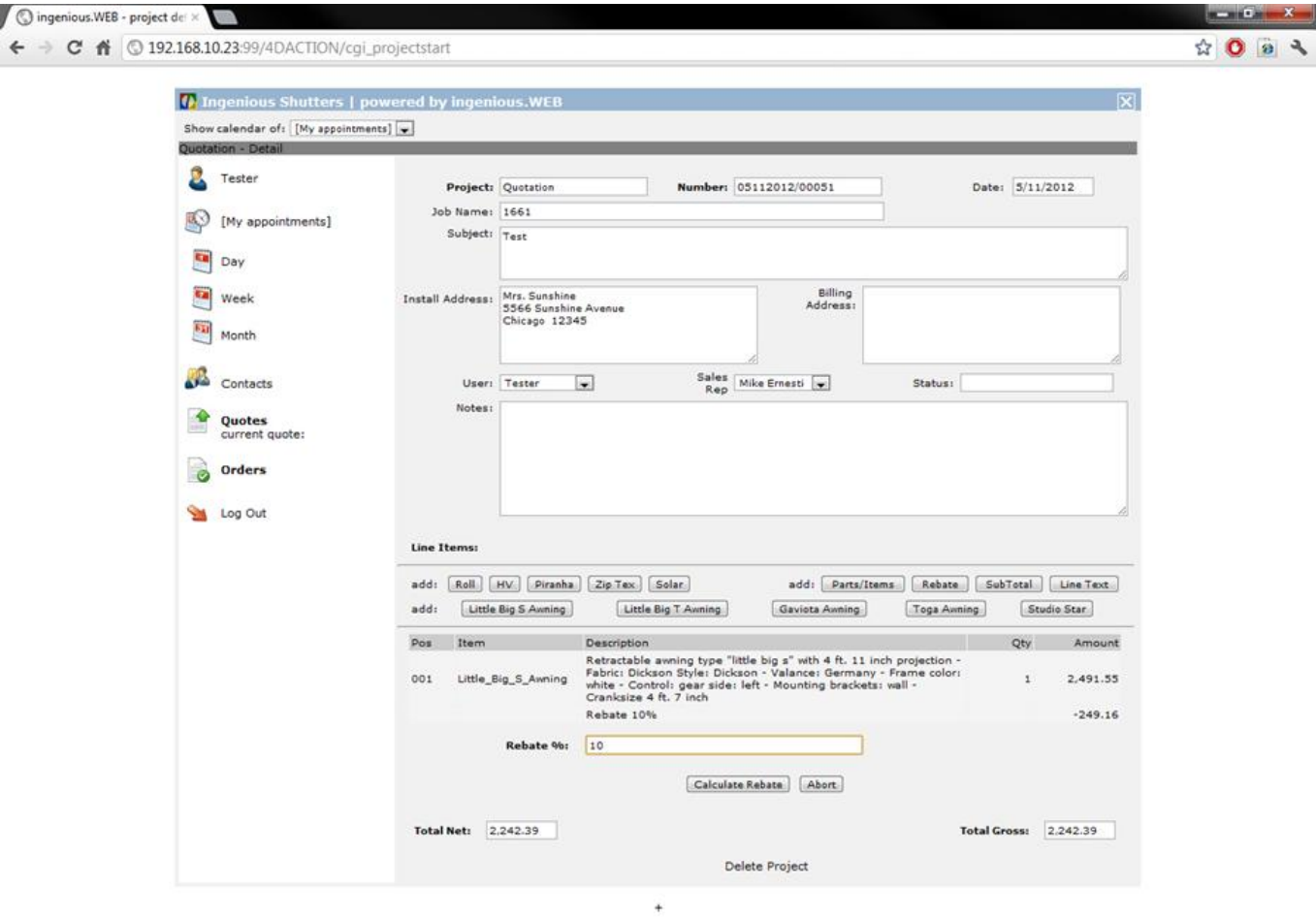
Next to the article buttons you find the item buttons, well known from ingenious.V12.

Parts/Items – Item Position

A new item can be added by entering the matchcode or item number.



Rebate – Rebate item



SubTotal

ingenious.WEB - project de x

192.168.10.23:99/4DACTION/cgi_projectstart

Ingenious Shutters | powered by ingenious.WEB

Show calendar of: [My appointments]

Quotation - Detail

Tester

[My appointments]

Day

Week

Month

Contacts

Quotes
current quote:

Orders

Log Out

Project: Quotation Number: 05112012/00051 Date: 5/11/2012

Job Name: 1661

Subject: Test

Install Address: Mrs. Sunshine
3566 Sunshine Avenue
Chicago 12345

Billing Address:

User: Tester Sales Rep: Mike Ernesti Status:

Notes:

Line Items:

add: Roll HV Piranha Zip Tex Solar add: Parts/Items Rebate SubTotal Line Text

add: Little Big S Awning Little Big T Awning Gaviota Awning Toga Awning Studio Star

Pos	Item	Description	Qty	Amount	
001	Little_Big_S_Awning	Retractable awning type "little big s" with 4 ft. 11 inch projection - Fabric: Dickson Style: Dickson - Valance: Germany - Frame color: white - Control: gear side: left - Mounting brackets: wall - Cranksize 4 ft. 7 inch	1	2,491.55	
		Rebate 10%		-249.16	
		<u>Subtotal</u>		(2,491.55)	
Total Net:		2,242.39	Total Gross:		2,242.39

Save Save & Exit Exit-don't save Print Quotation Convert to Order Delete Project

Line Text – Text item

ingenious.SHUTTERS | powered by ingenious.WEB

Show calendar of: [My appointments]

Quotation - Detail

Tester

[My appointments]

Day

Week

Month

Contacts

Quotes
current quote:

Orders

Log Out

Project: Quotation Number: 05112012/00051 Date: 5/11/2012

Job Name: 1661

Subject: Test

Install Address: Mrs. Sunshine
3566 Sunshine Avenue
Chicago 12345

Billing Address:

User: Tester Sales Rep: Mike Ernesti Status:

Notes:

Line Items:

add: Roll HV Piranha Zip Tex Solar add: Parts/Items Rebate SubTotal Line Text

add: Little Big S Awning Little Big T Awning Gaviota Awning Toga Awning Studio Star

Pos	Item	Description	Qty	Amount
001	Little_Big_S_Awning	Retractable awning type "little big s" with 4 ft. 11 inch projection - Fabric: Dickson Style: Dickson - Valance: Germany - Frame color: white - Control: gear side: left - Mounting brackets: wall - Cranksize 4 ft. 7 inch	1	2,491.55
		Rebate 10%		-249.16
		Subtotal		(2,491.55)
		Text item...		

Description: Text item...

Save Line Item Exit - don't save Delete Line Item

Total Net: 2,242.39 Total Gross: 2,242.39

Delete Project

When you want to convert a quote to an order, click in the quote view on the button "Convert to Order". You will be automatically get to the order view. Sales reps can't modify these but view them.

ingenious.WEB - project de

192.168.10.23:99/ordermanage/CGI_Action=init&CGI4D_t_sessionID=201205111044380006113410000020898&CGI4D_t_whereFrom=ProjectManager&CGI

Ingenious Shutters | powered by ingenious.WEB

Show calendar of: [My appointments]

Quotation - Detail

Tester

[My appointments]

Day

Week

Month

Contacts

Quotes

List all quotes for:

Create a new quote for:

Orders

Log Out

Project: Order confirmation Number: 05112012/00075 Date: 5/11/2012

Job Name: 1661

Subject: Test

Install Address: Mrs. Sunshine
5566 Sunshine Avenue
Chicago 12345

Billing Address:

User: Tester Sales Rep: Mike Ernesti Status:

Notes:

Line Items:

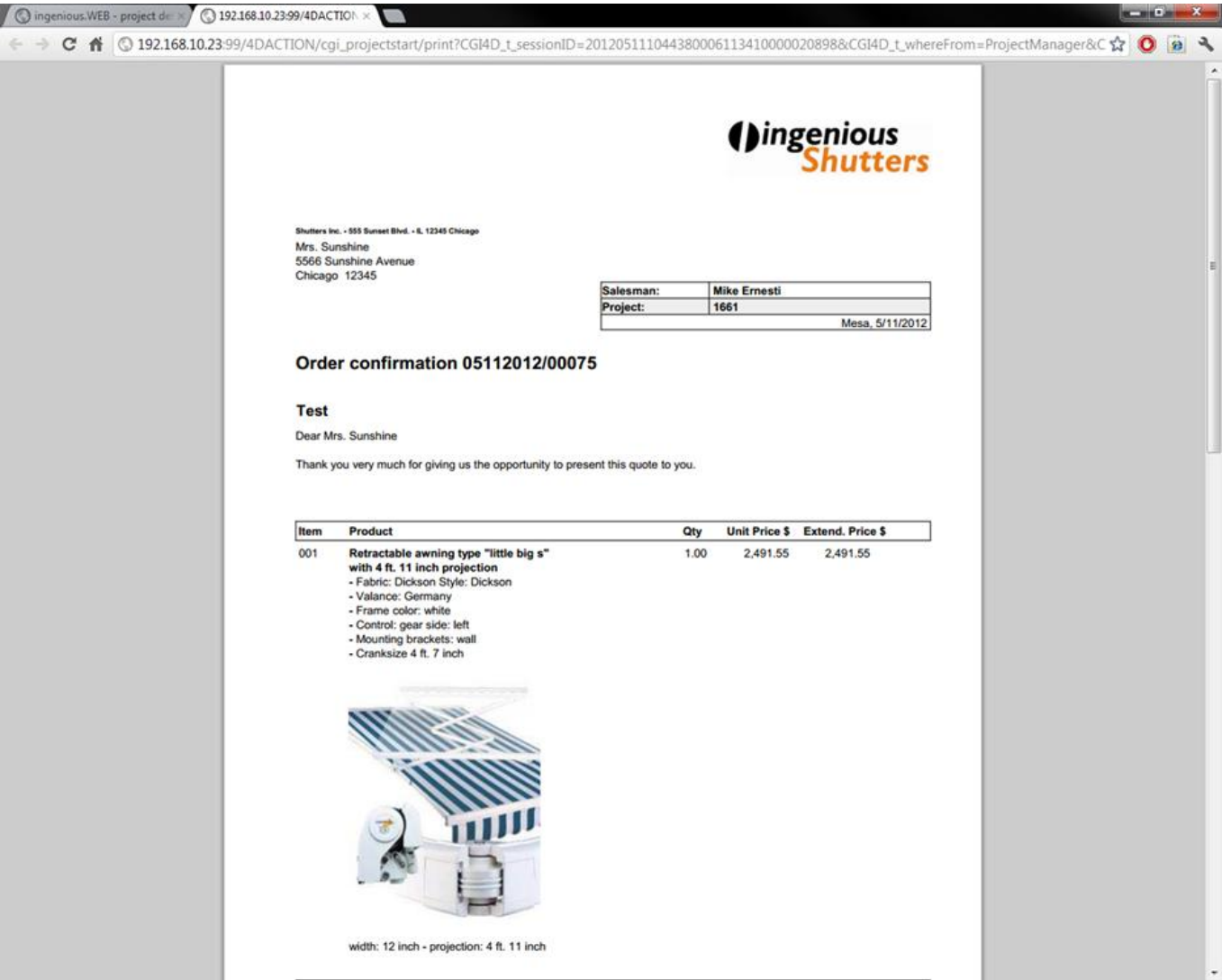
Pos	Item	Description	Qty	Amount
001	Little_Big_S_Awning	Retractable awning type "little big s" with 4 ft. 11 inch projection - Fabric: Dickson Style: Dickson - Valance: Germany - Frame color: white - Control: gear side: left - Mounting brackets: wall - Cranksize 4 ft. 7 inch	1	2,491.55
		Rebate 10%		-249.16
		Subtotal		(2,491.55)
		Text item...		

Total Net: 2,242.39 Total Gross: 2,242.39

Exit-don't save Print Order confirmation

Example order view

All quotes and orders can be printed by clicking the button "Print". Then a PDF will be created, that you can save or print with a connected local or network printer.



You can search for all quotes, offers and contacts.

The screenshot shows a web browser window with the URL `192.168.10.23:99/4DACTION/cgi_projectstart/query/&unique=711831`. The application is titled "Ingenious Shutters | powered by ingenious.WEB". On the left is a sidebar menu with options: Tester, [My appointments], Day, Week, Month, Contacts, Quotes, List all quotes for: (with a sub-option "Create a new quote for:"), Orders, and Log Out. The main content area is titled "Quotations - List" and includes a search bar and filters: "show all | last 10 days | shipped | not shipped | Search: *". Below this is a table of quotations.

Document	Doc.No.	Date	Job Name	Customer	Gross \$ Amount
Order confirmation	05112012/00075	5/11/2012	1661	Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	\$2,242.39
Order confirmation	05032012/00074	5/3/2012		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$50.00
Order confirmation	04262012/00073	4/26/2012	pps	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$9,587.25
Order confirmation	04262012/00072	4/26/2012	CutOpt	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$8,050.00
Order confirmation	04232012/00071	4/23/2012	test 43	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$70,334.57
Order confirmation	04192012/00070	4/19/2012	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$45,043.53
Order confirmation	04192012/00069	4/19/2012	Capacity1	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	\$117,164.48
Order confirmation	04022012/00068	3/28/2012	one-family house	White Productions 327 East Highway USA-12345 Chicago	\$586,237.84
Order confirmation	03232012/00067	3/23/2012	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunset Blvd. Chicago 12345	\$2,862.00
Order confirmation	03162012/00066	3/16/2012		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345	\$1,598.70

At the bottom of the table, it says "28 Results / Page 1 of 3" and "Create a new quote for *".

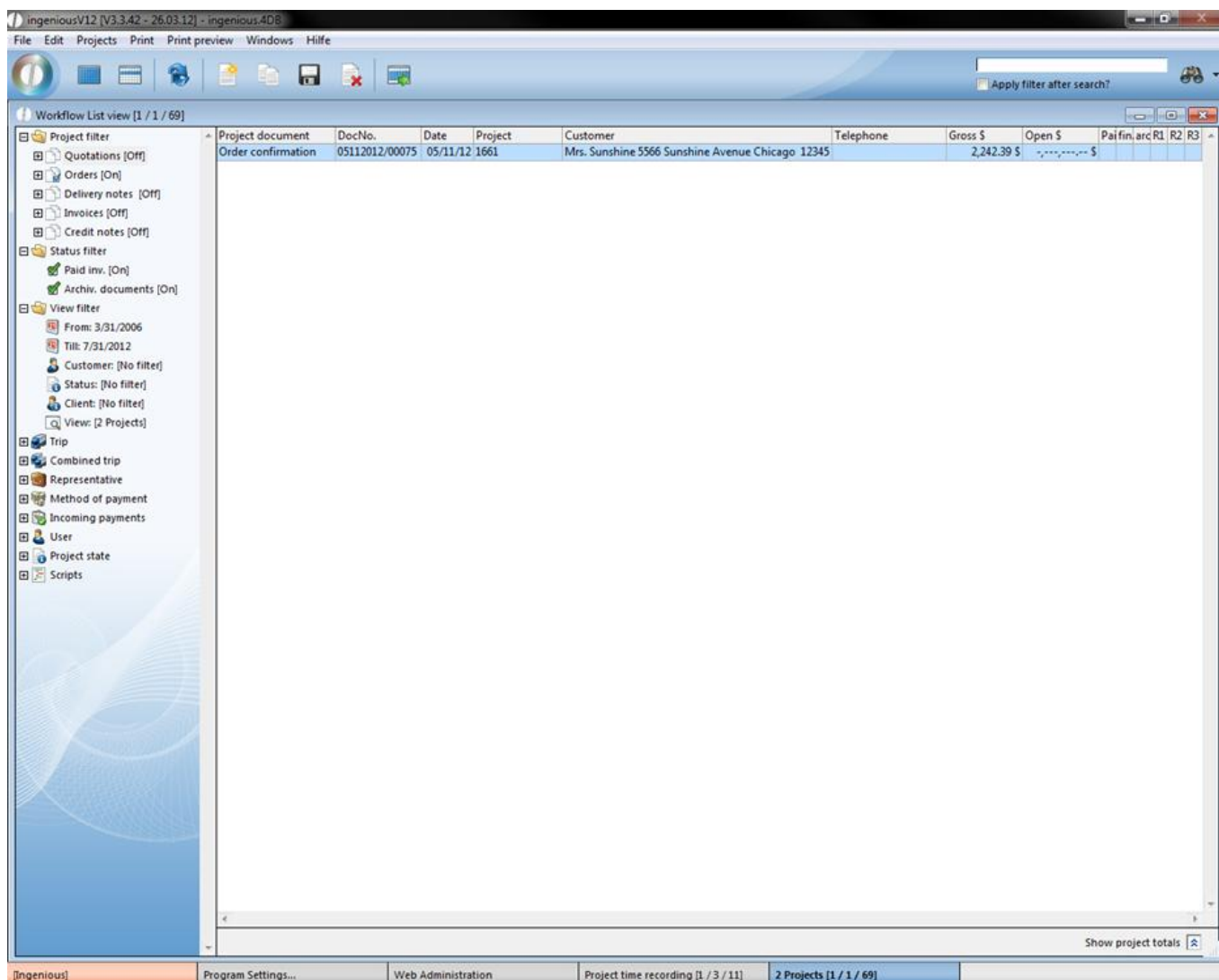
Reports:

- Customer specific reports for special prices, sales and customer status in PDF
- ABC customer analyses for single business years for any customers
- Filter for several representatives or all
- CRM analyses for single customers as month or year analyses
- Item statistics for single customers

To leave the Web access click on

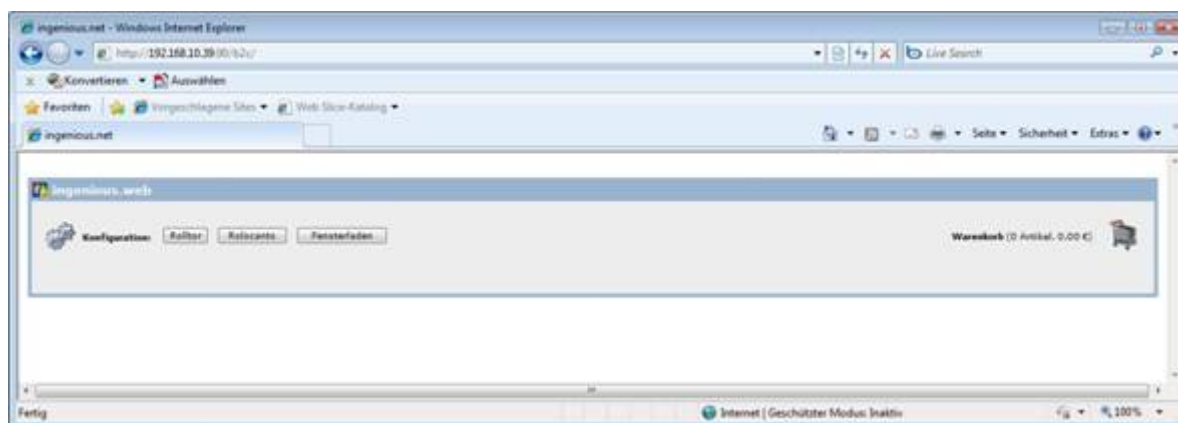


All quotes and orders created by the sales reps are saved directly in ingenious.V12. This also takes affect for all B2B – and B2C quotes.

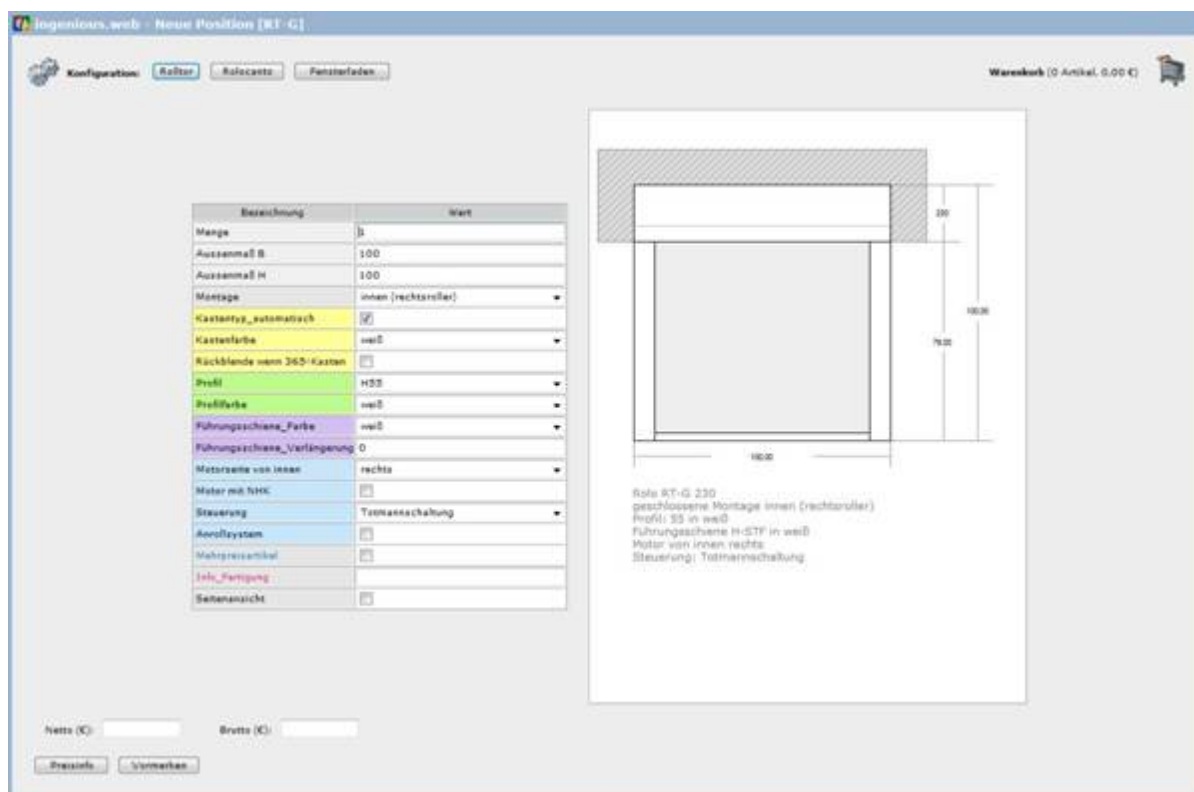


8.6 Webshop B2C

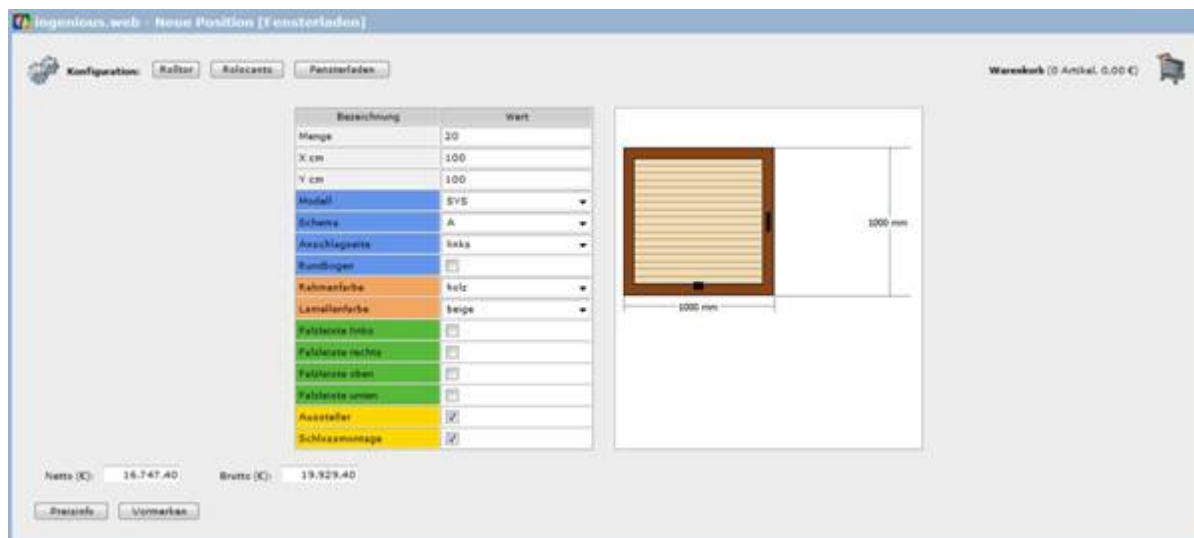
B2C (= business to customer" is a web shop for the customer resp. for the end-consumer, which places a purchase online or requests a quote. When the customer gets to the web shop he finds a list of all possible items and the cart.



By clicking on the desired item the part list will open up.





When the configuration is done the current net and gross price can be displayed by clicking "price info".



By clicking "reserve" the item is added to the cart and the cart list will open up.



With the help of the button  and  the item can be modified or deleted. To delete all items use the button "Reset". When all desired items are in the cart you get to the last step of the purchase transaction by clicking "Input address".

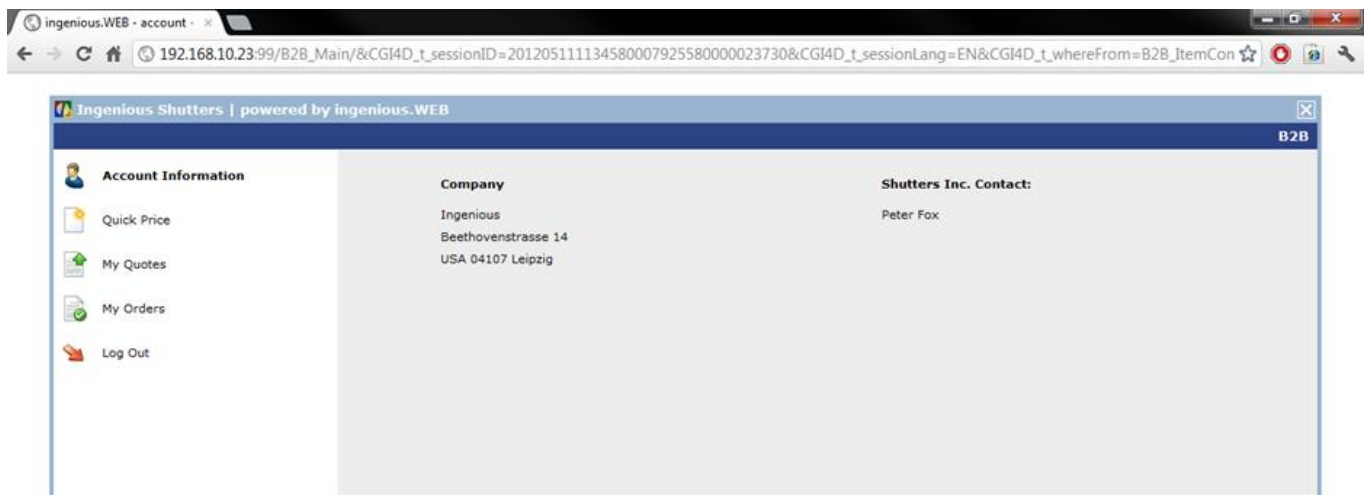
Here you have got the opportunity to make annotations for the purchase. When you click on the button “Request quote” the purchase will be send as an order to the ingenious.V12 database and can be modified resp. executed there.



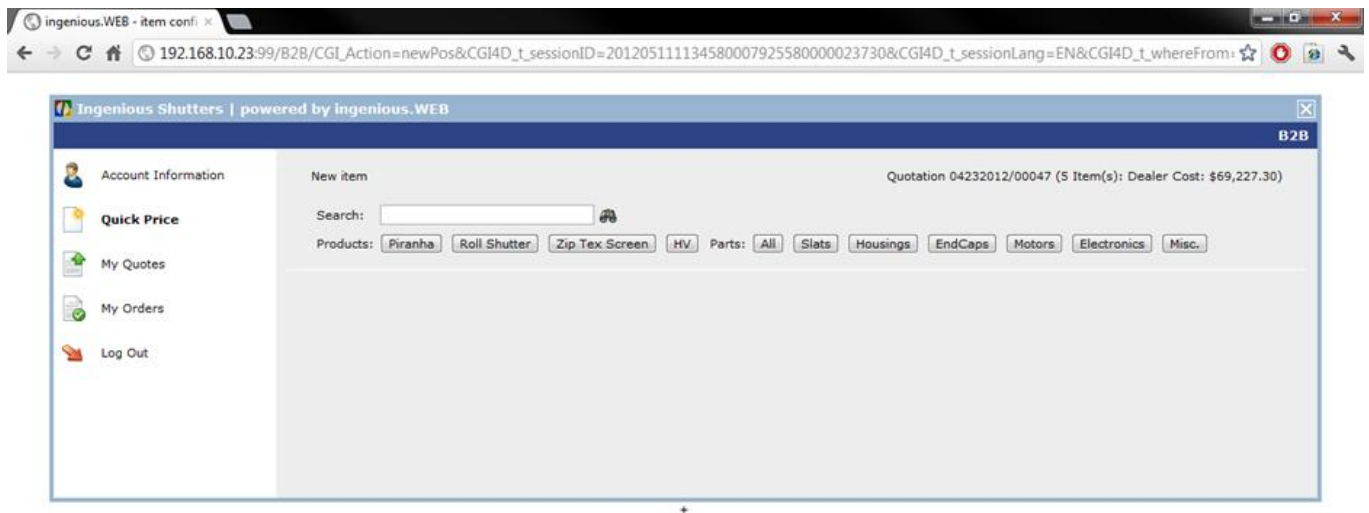
8.7 Webshop B2B

B2B (= business to business) is the web shop for specialist dealers/resellers. The seller has only a limited input opportunity. That means, he only sees his own data, can receive several range of goods resp. place purchases in ingenious.V12 and can view the orders.

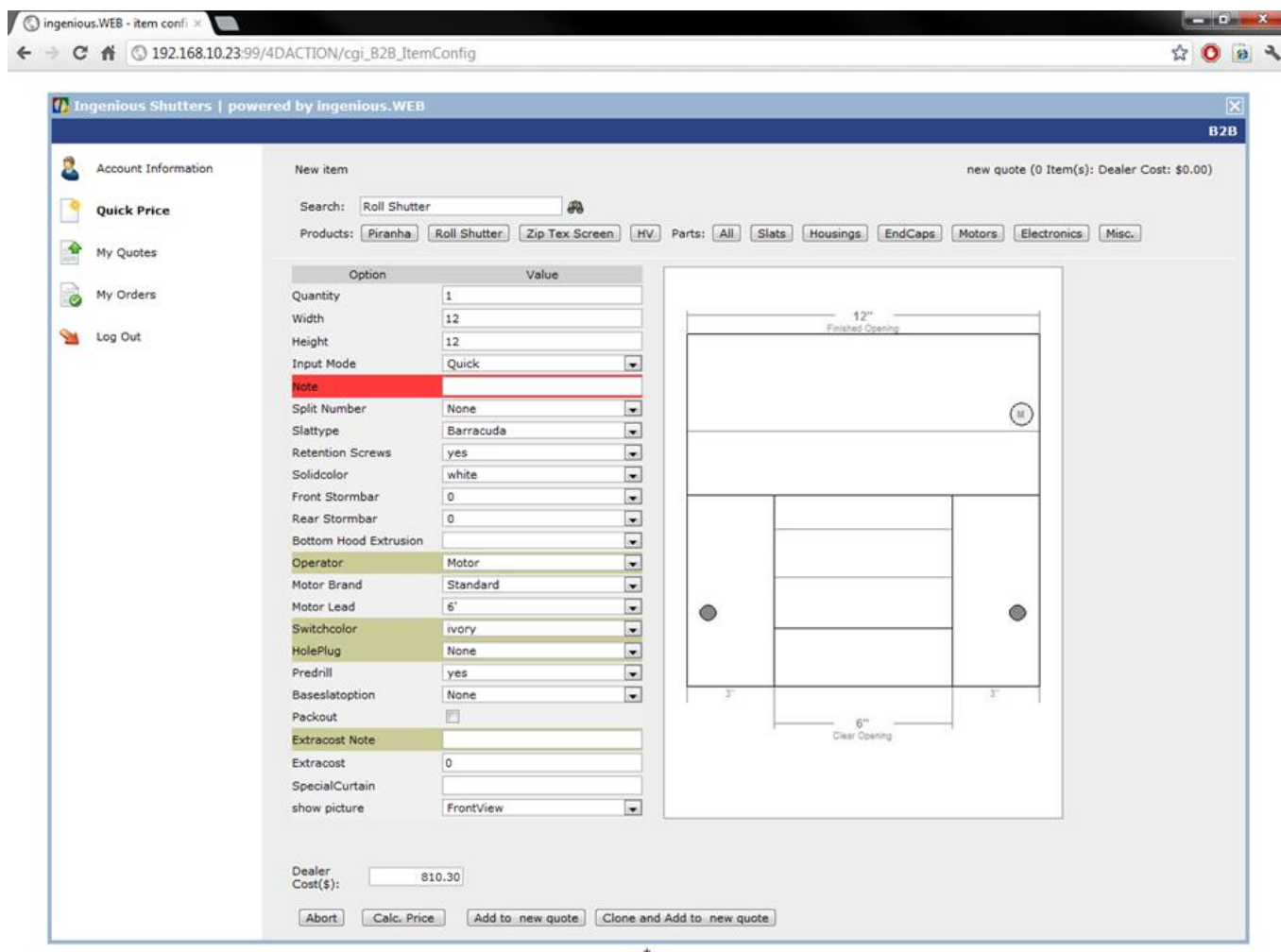
At the start the account information of the seller and the contact of your company will be displayed to the salesman.





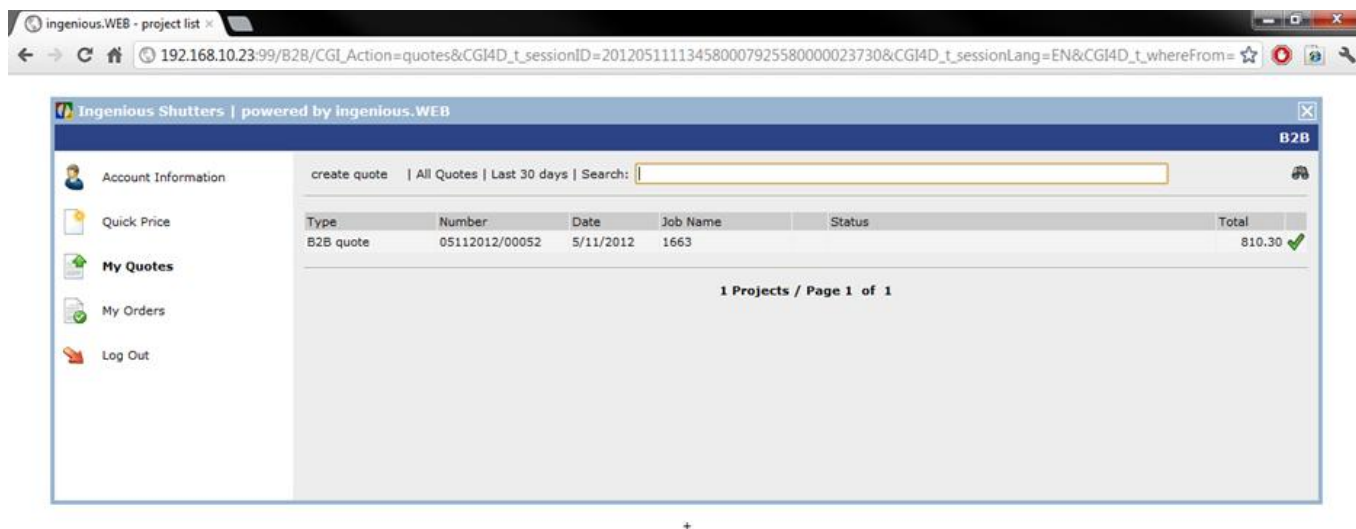
In the following category he has the opportunity to create a new quote. To do so he can enter the matchcode of a single item directly or he selects a part list with the item buttons.



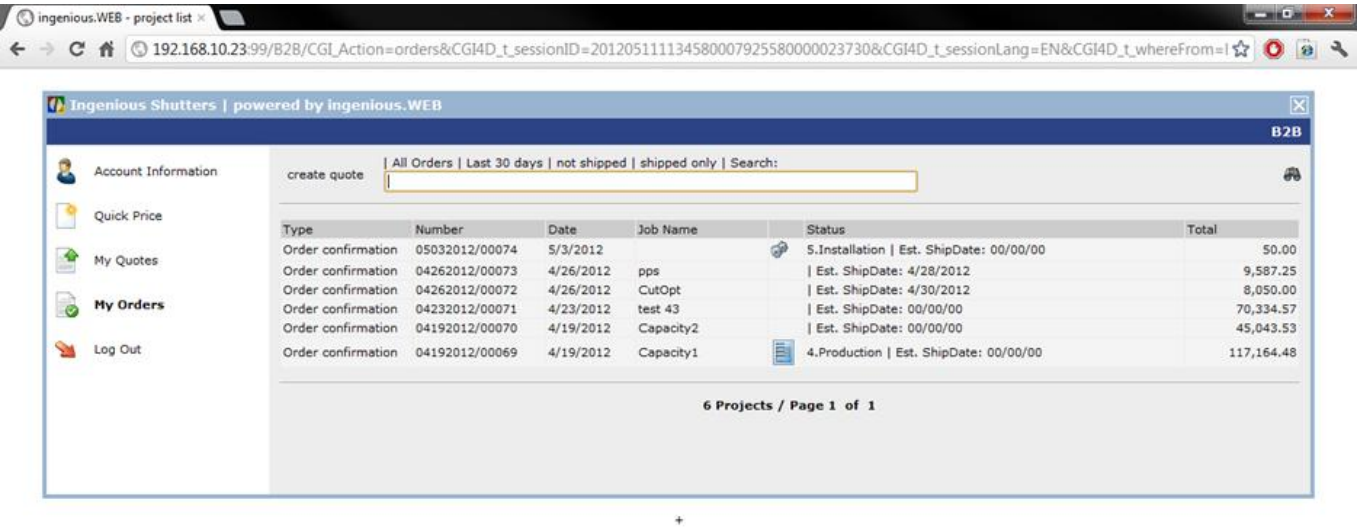
The part list will open up and the seller can modify the item attributes according to his wishes. If available in the part list, a preview picture can be displayed. Furthermore the specialist dealer can add an addition in percent or dollar for the price calculation and by clicking the button "calc price" let the net and gross price be displayed. Also all special prices for the specialist dealer will be considered. To add the article as an item, the salesman has to click on "Add to new quote".



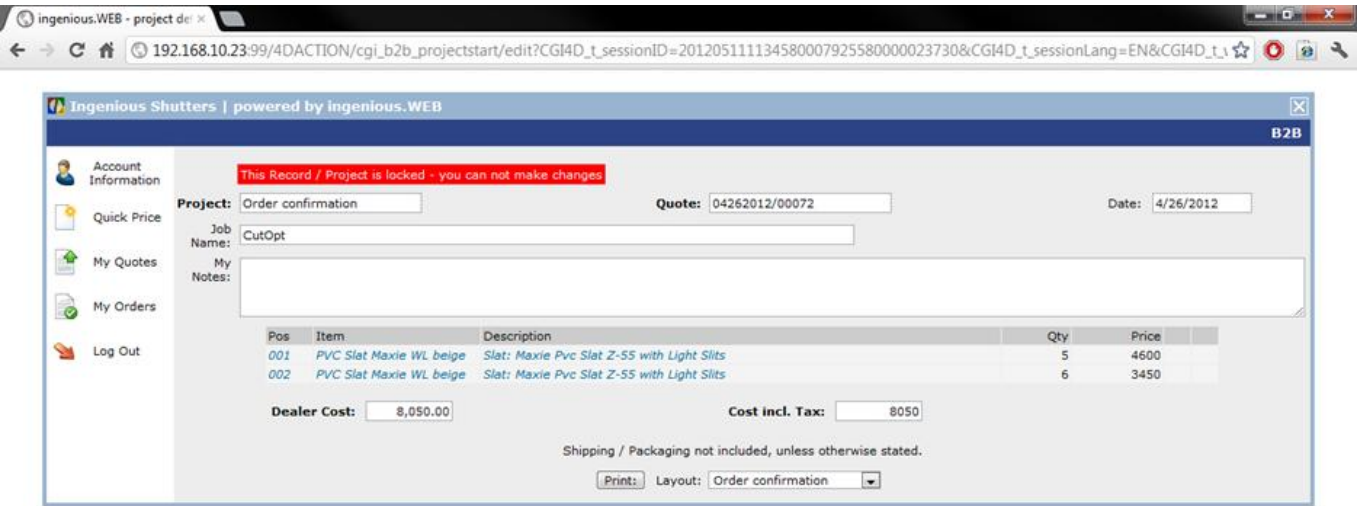
The detail view of the quote will open up, where the salesman can modify the quote, add items, delete it etc. With the buttons  and  a single item can also be modified or deleted. When a quote is finalized, it will be checked with a green check mark in the quote list.



In the category "My orders" a list of all obtained orders will be displayed. With a double click a order can be opened.



The order can only be viewed, printed but not modified.



With "Log Out" the seller can leave the B2B Web shop.

9 Integrated tools

9.1 Search functions

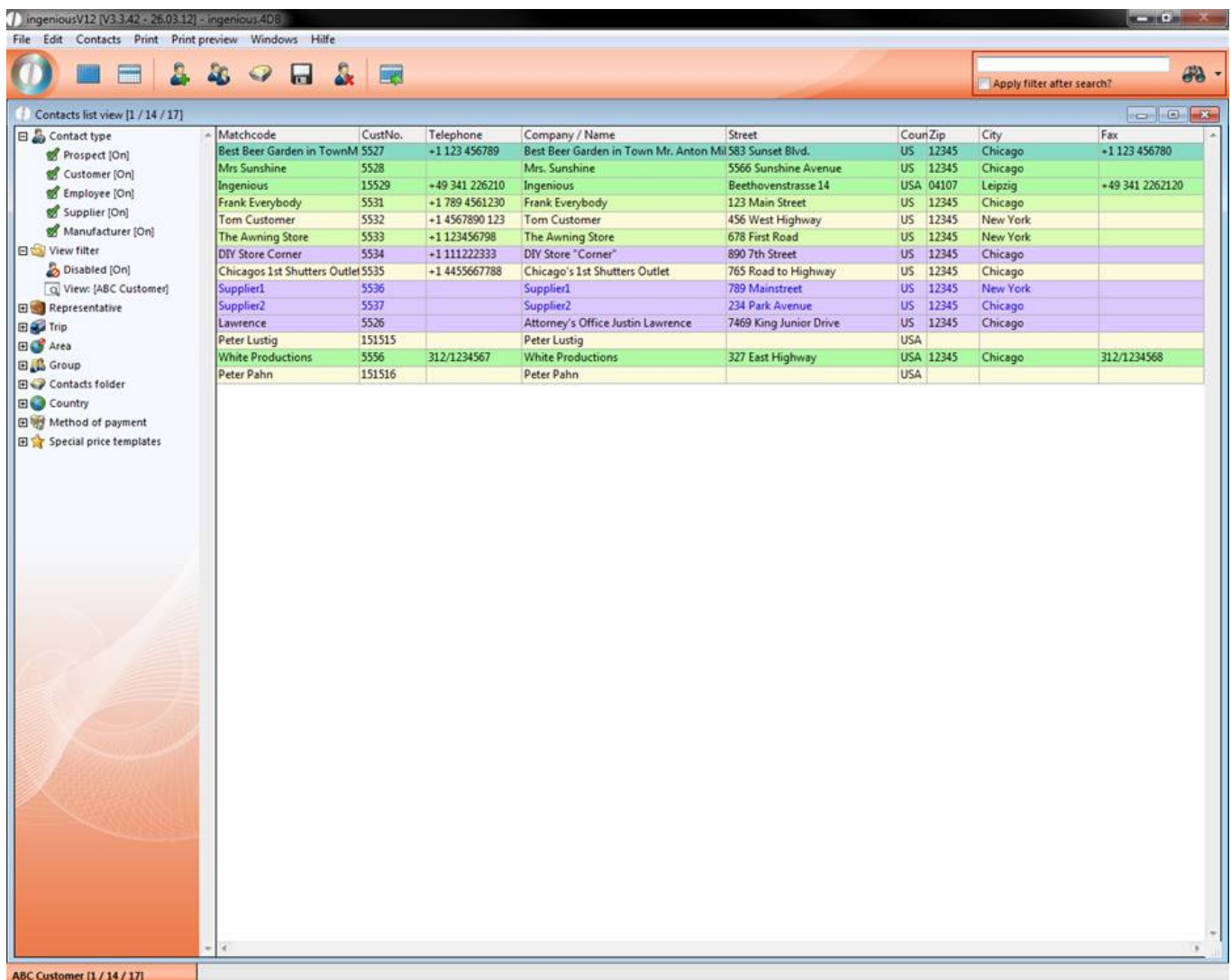
Ingenious.V12 uses an effective database system for the administration of data. In order to retrieve records, you have two search possibilities available to you. One is a quick search in which the complete search is made quickly and easily. The other is a detail search that allows you to master complex searches

Joker symbols

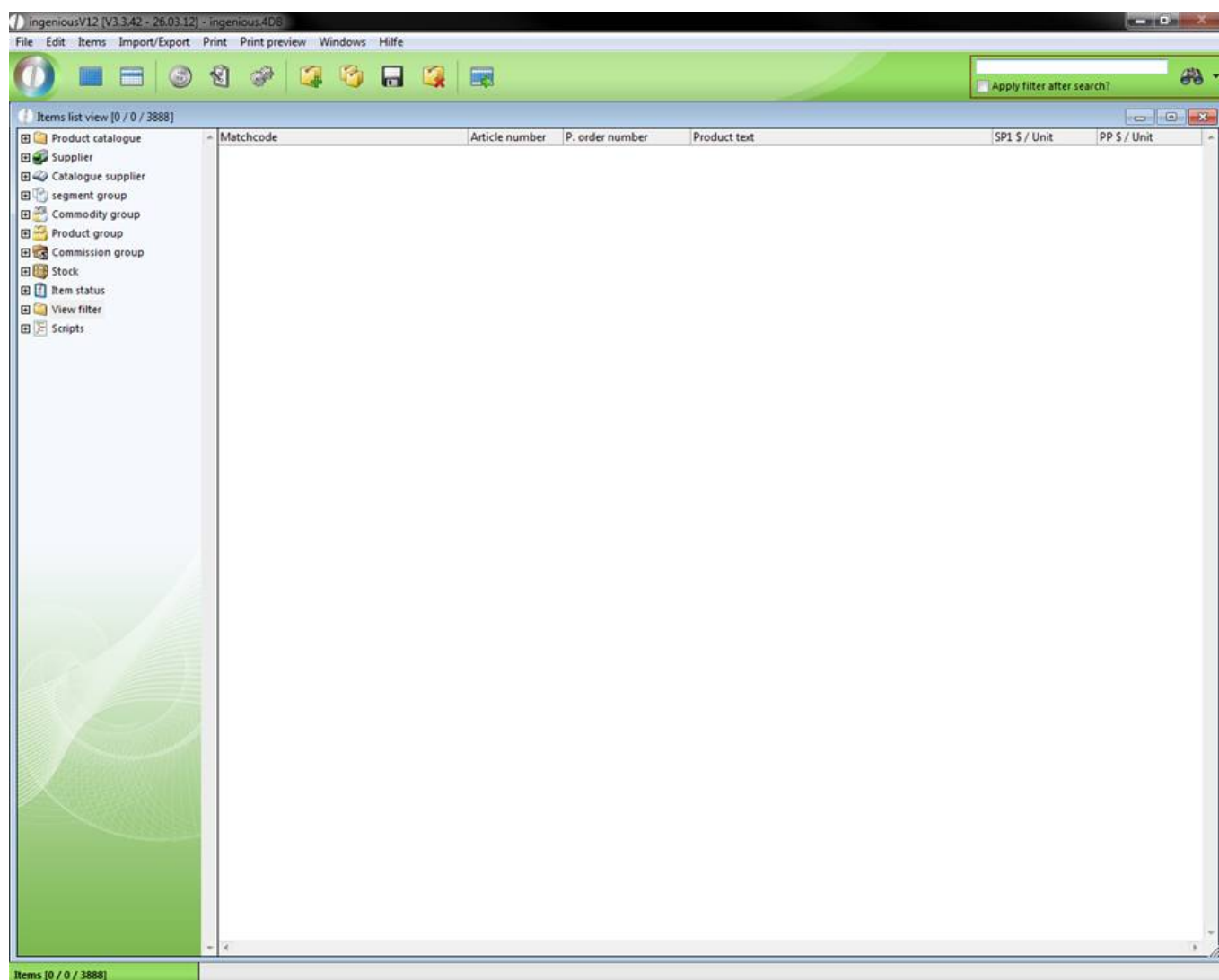
The * is a so-called joker symbol. It displays an arbitrary number of an arbitrary symbol. Ingenioius.net has two different joker symbols available. The familiar * (↑ + *) and the @ (Alt Gr + Q). The input and effectiveness of the two joker symbols is the same and there is no difference whatsoever. The joker symbols can also be mixed with @ and *combined.

The quick search function

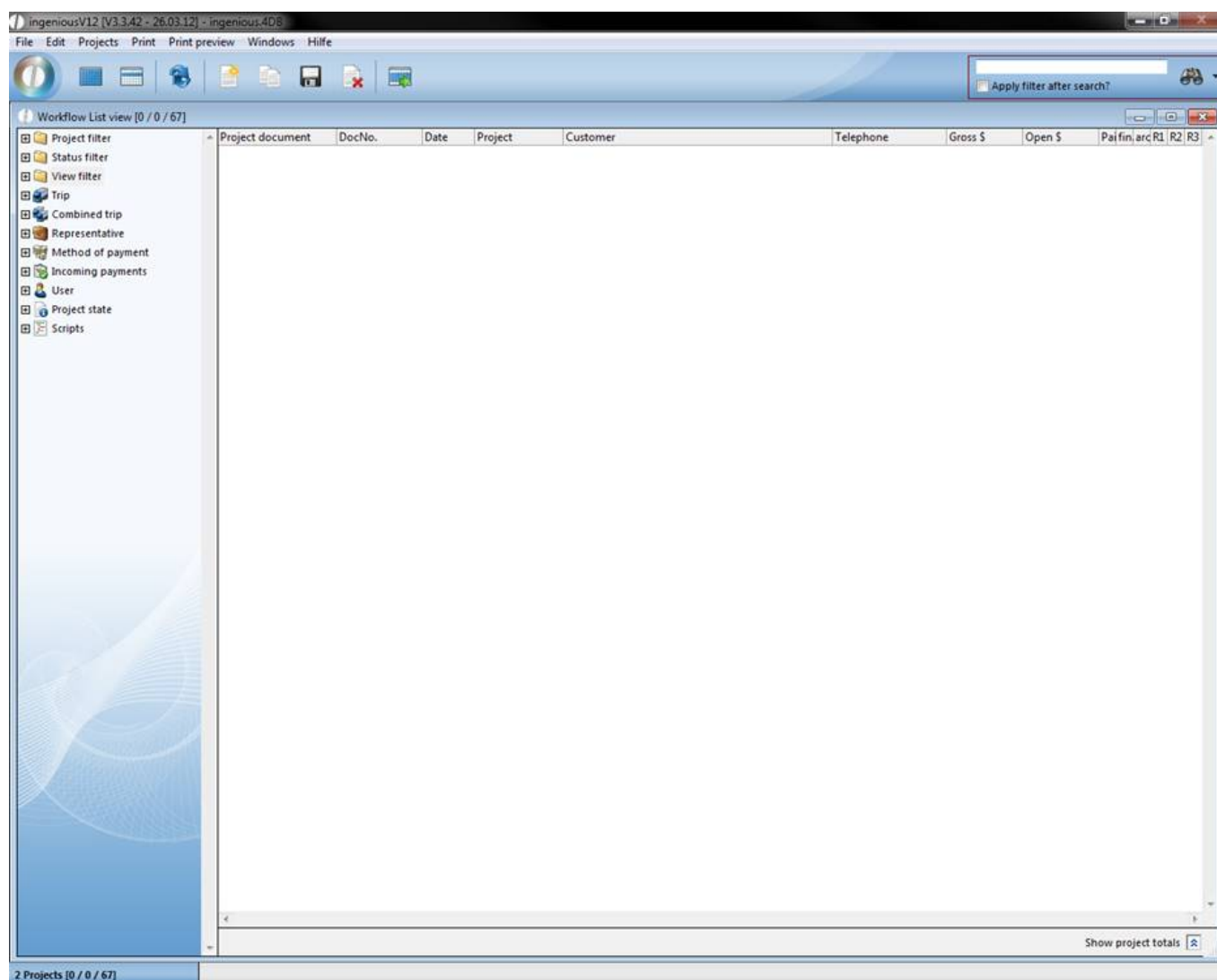
Due to the fact that a quick search is the most employed search method, it is displayed in each module window and therefore easily and quickly accessible.



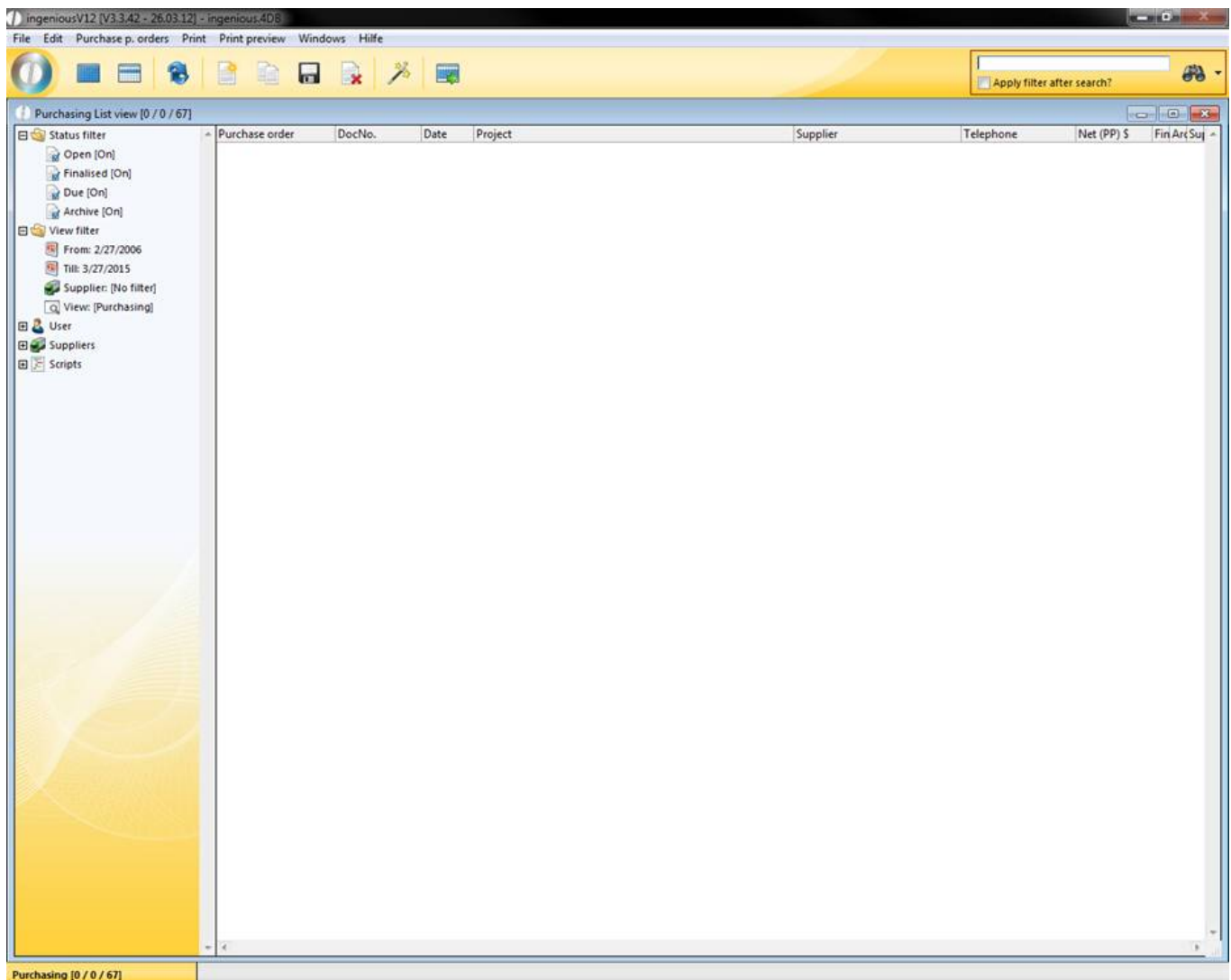
Quick search in the "Customer" area module window




Quick search in the "Article" area module window

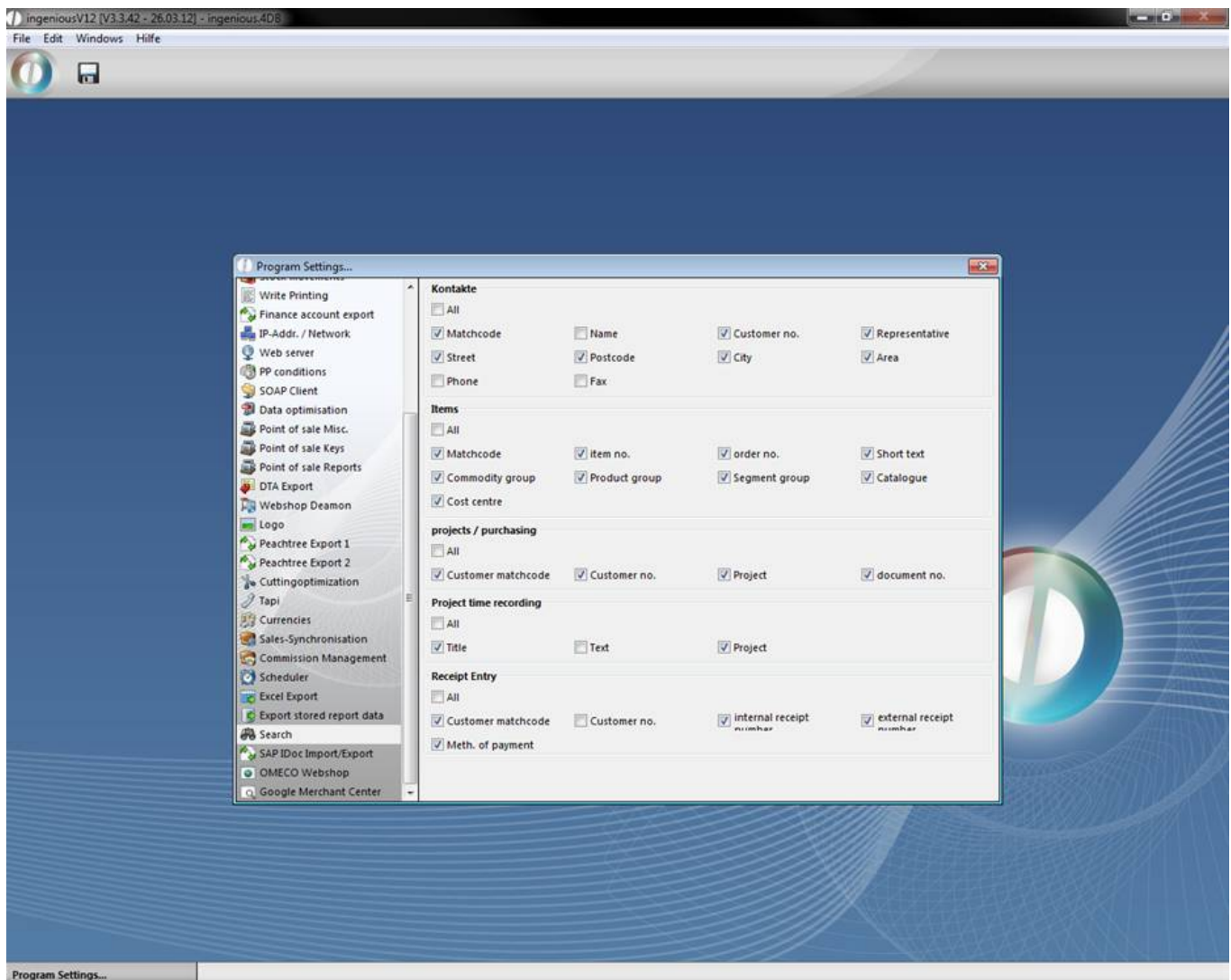


Quick search area in the module window of the workflow module



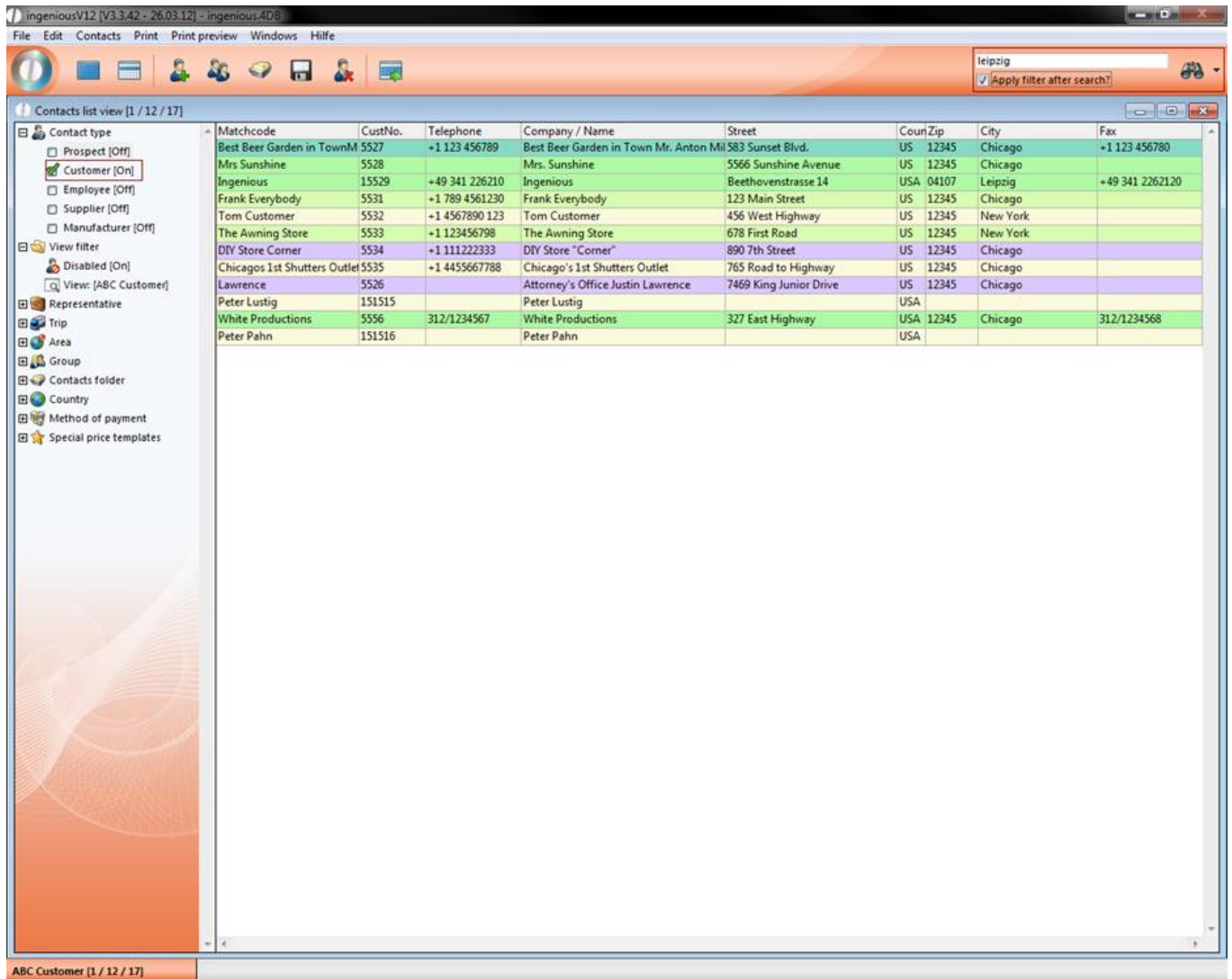
Quick search area in the "Purchasing" module window


The quick search (framed in red in the illustration) is comprised of the entry field and the action button . You can search for all relevant data in the modules. In the program settings in the category "Search" you can define in which fields the search should be performed.



Practice with quick search

1. For your quick search enter in the search field "Leipzig". It doesn't matter if you write "leipzig", "Leipzig" or "LEIPZIG", because the quick search, as well as the detail search, ignores upper and lower case. When you activate the field "Apply filter after search?", you only get the contacts, that correspond to the filter settings. In this example we only want to get contacts of the type "Customer".



2. After confirming the search by pressing the return key or clicking the action button  the search will be performed.

The detailed search function

The detail search is also easy to operate despite its higher effectiveness. With the little arrow next to the action button you get to the detail search.

The buttons in the menu bar for the detail search



Create new search



Confirm and save search criteria



Delete search



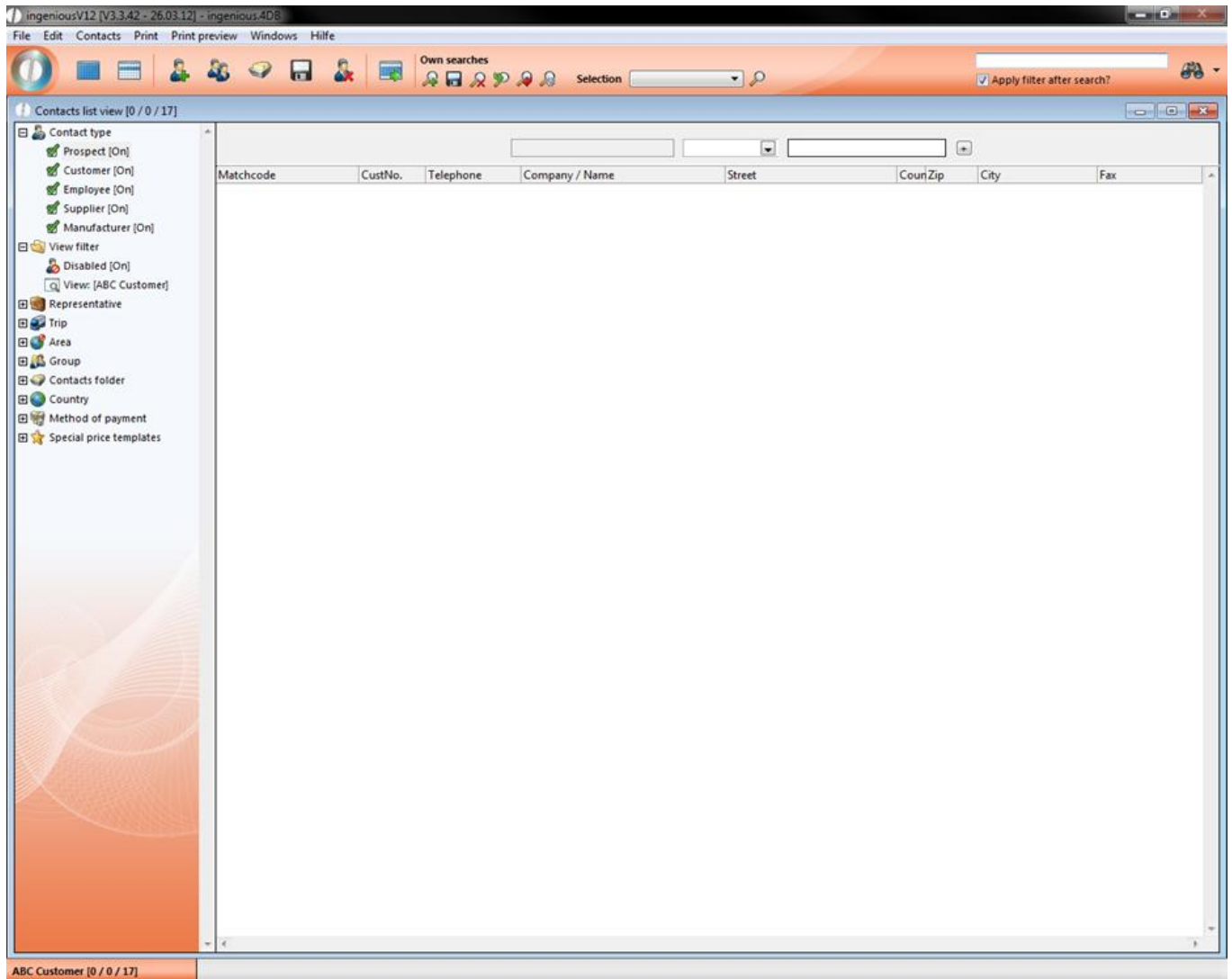
Import search



Export search

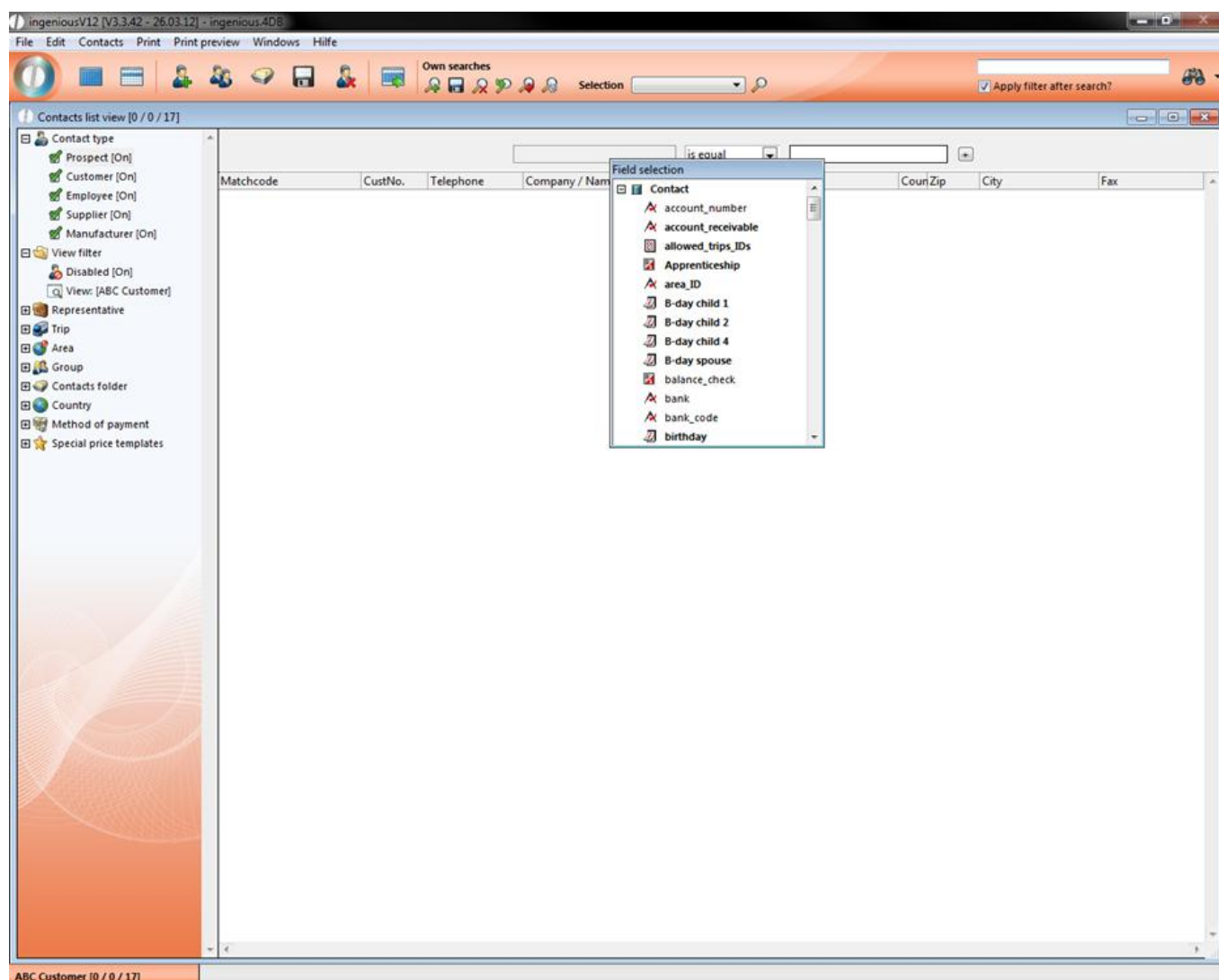


Toggle between search and configuration module

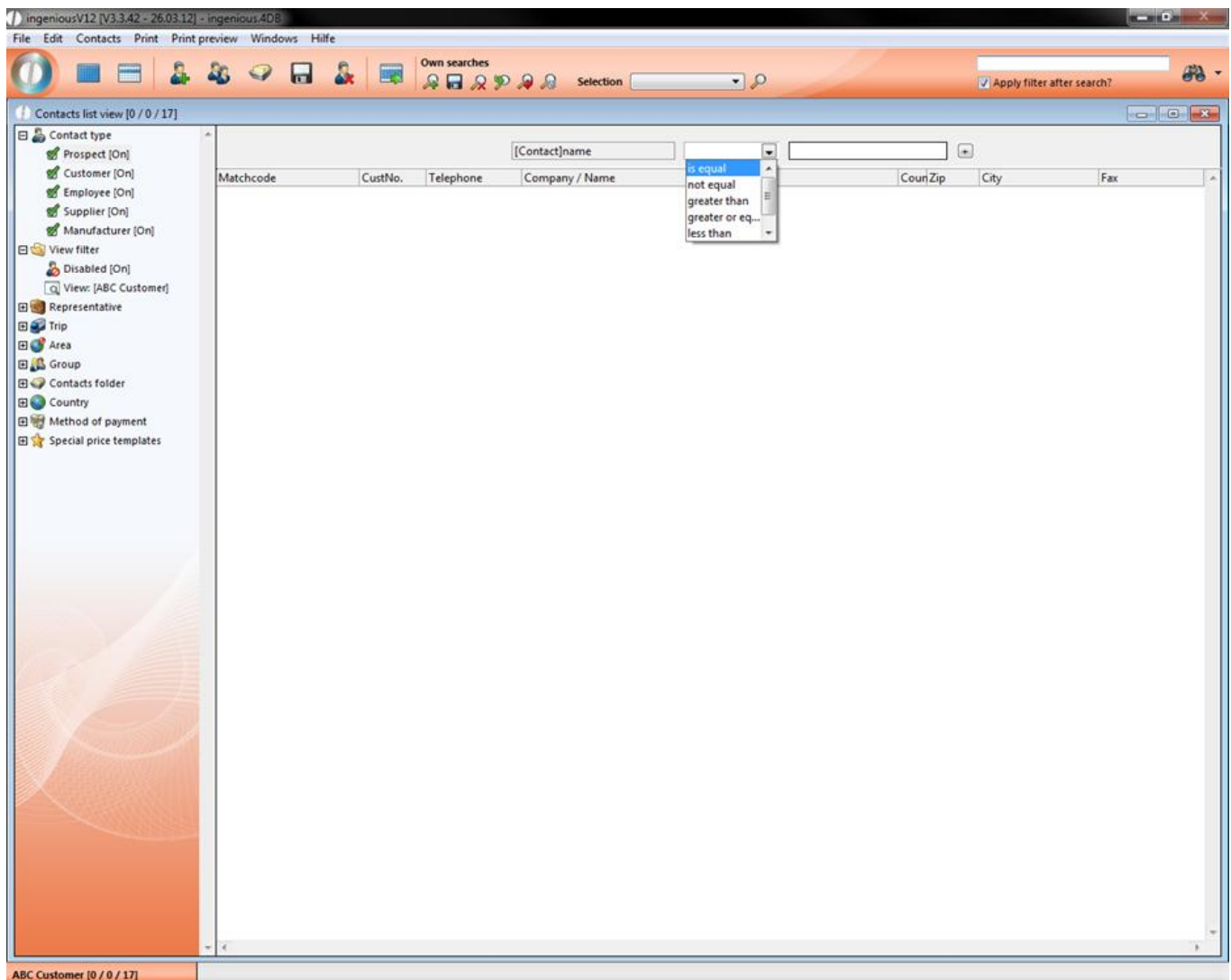




The detail search is really efficient because of the six comparative operators "is equal", "not equal", "greater than", "greater or equal", "less than" and "less or equal". With the help of these comparative operators you can add conditions to your search task. Compared to the quick search the advantage of the detail search is, that you can search for multiple values. For instance you can search with the quick search after all contacts, having a name beginning with "A". With the detail search you can search for all contacts having a name beginning with "A" and coming from the city "Leipzig". This is called "combined search". Only the records fulfilling all conditions are listed.

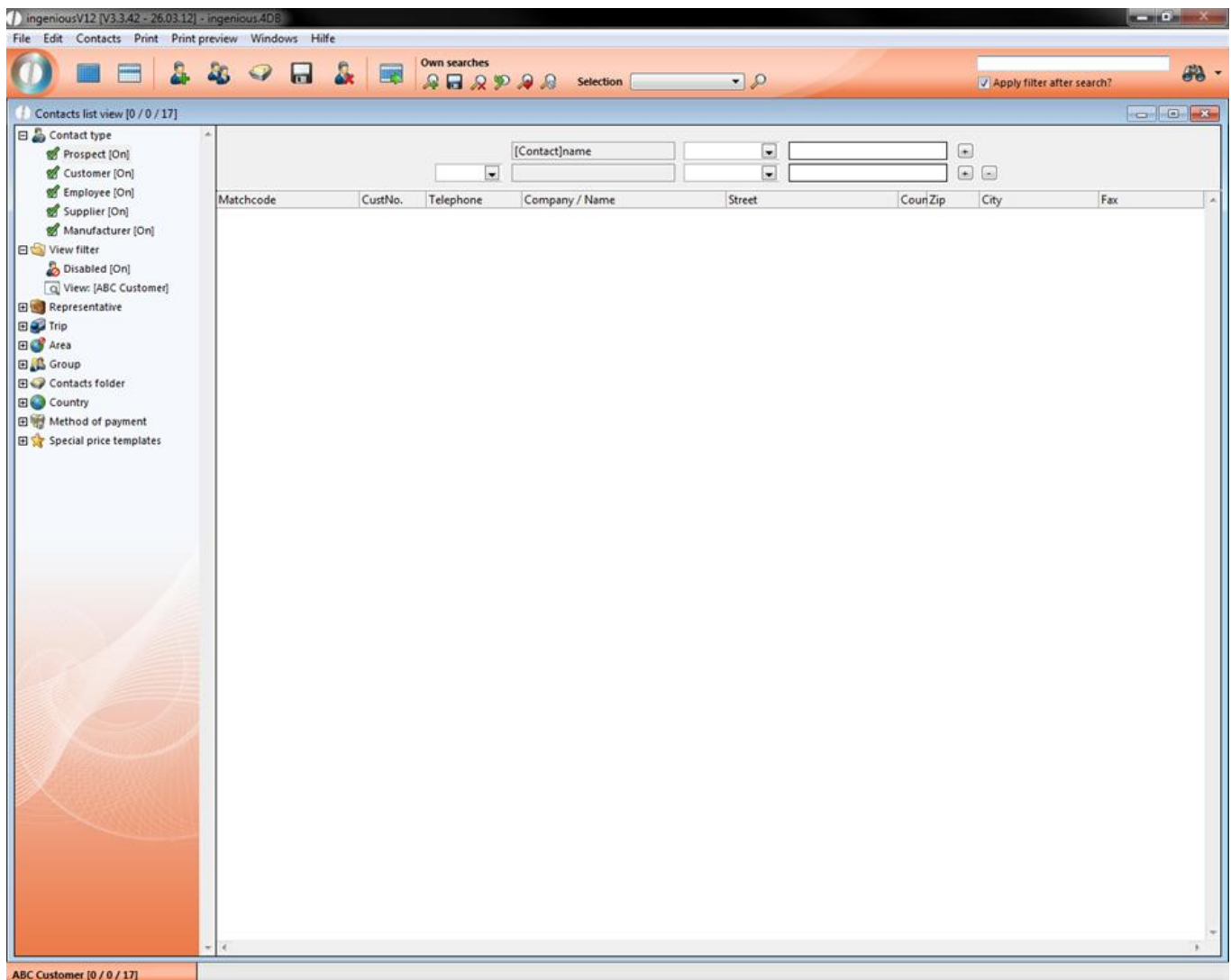
With a double click in the first field of the detail search you open the available criteria for the search. These differ corresponding to the module.



In the next field you can choose between the six already described conditions.



Enter your search value in the next field. With a click on  a new search option bar will open up. If you want to remove a line, just click on the .

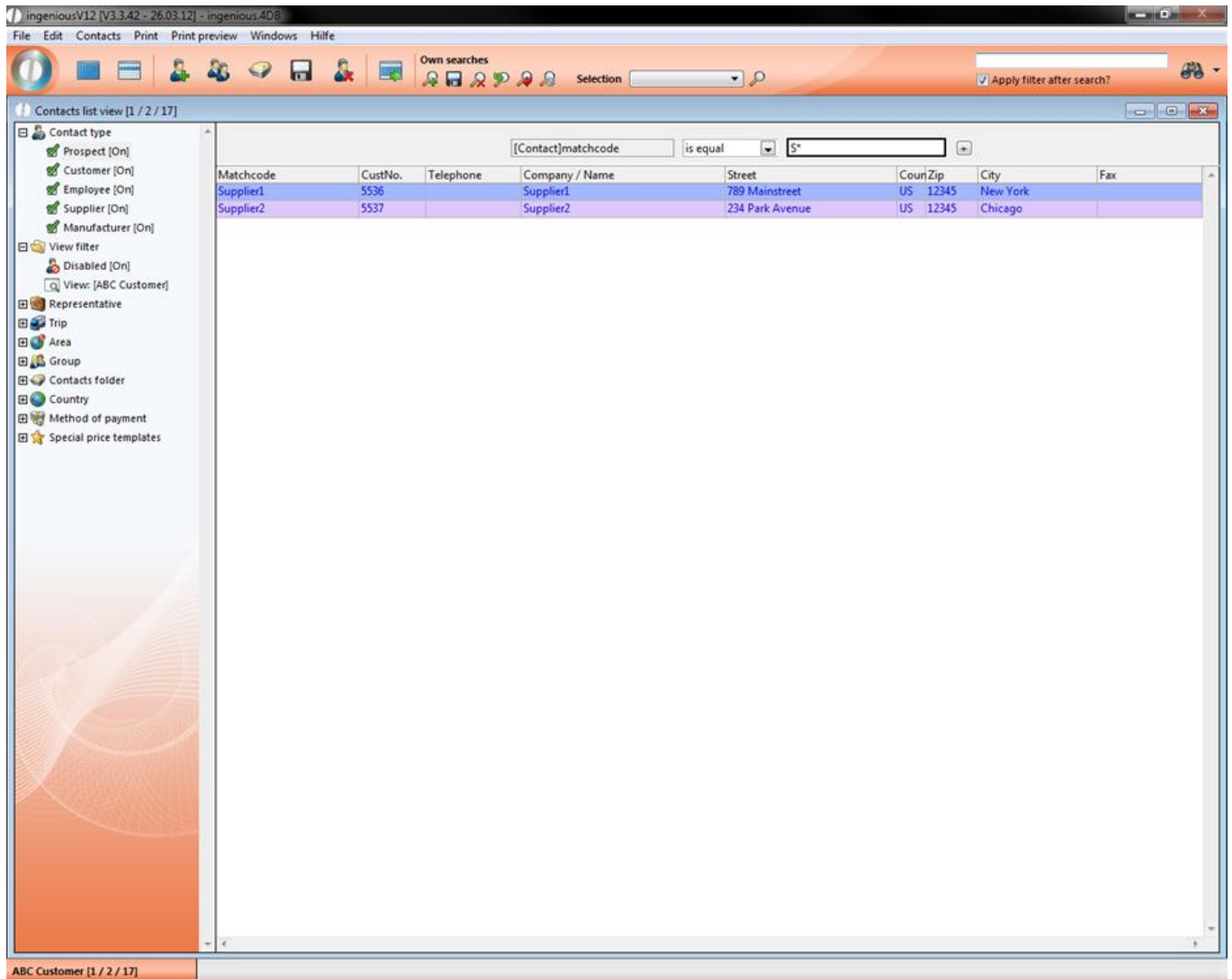





Practice for the detail search

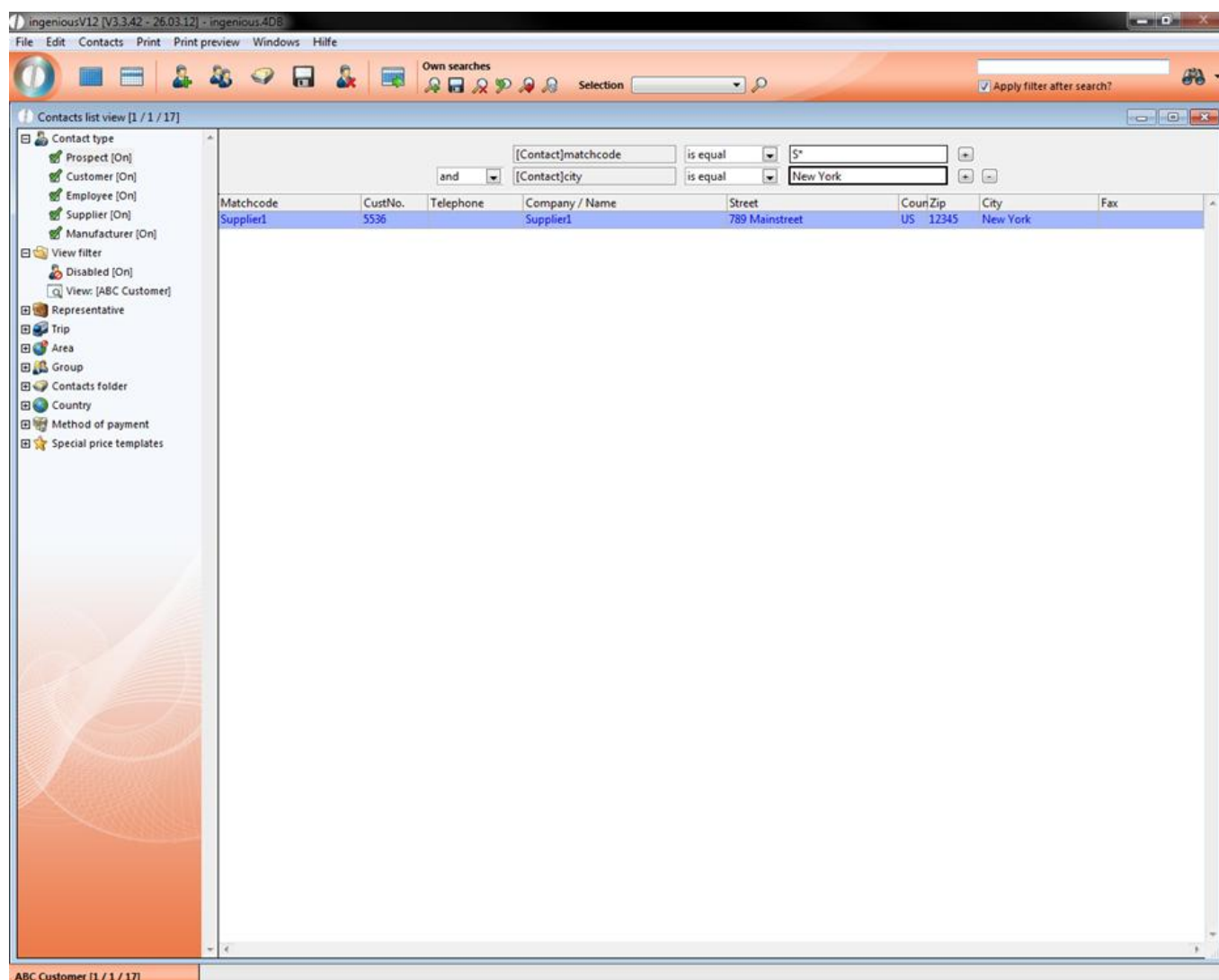
1. Open the detail search editor in the module "Contacts" by clicking on the little arrow next to the action button




2. Double click the first (grey colored) field in the detail search bar. Choose the entry "matchcode", in the condition field "is equal" and enter in the last field "S*".

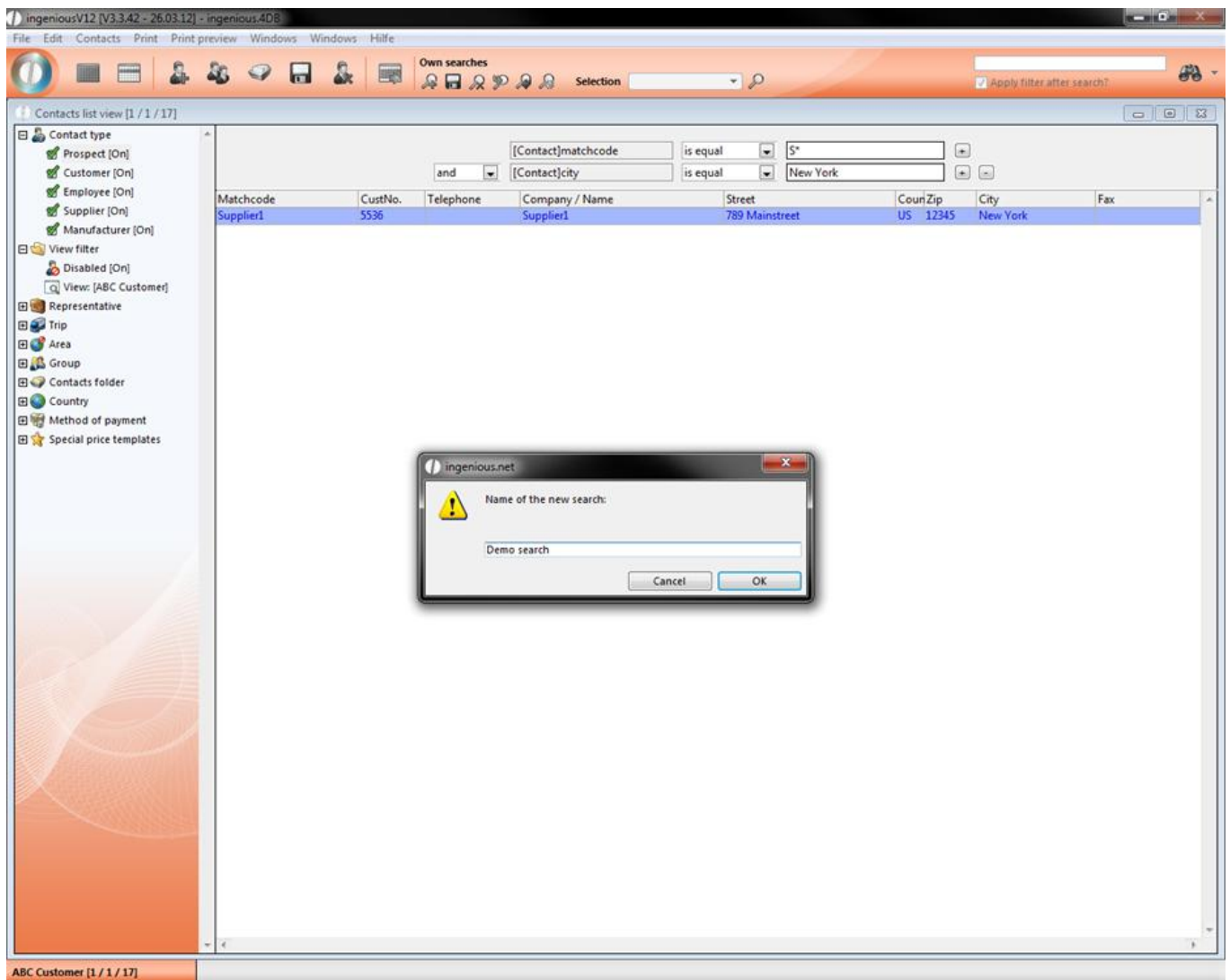


3. With a click on the button  in the icon bar all results will be displayed having a matchcode beginning with "S".
4. Extend the search by clicking on .
5. Select "and" in the first drop down menu; "City" as the search criteria; "is equal" as the condition and enter the value "New York" in the value field. By clicking  again, all records are listed coming from the "New York" and having a matchcode beginning with "S".

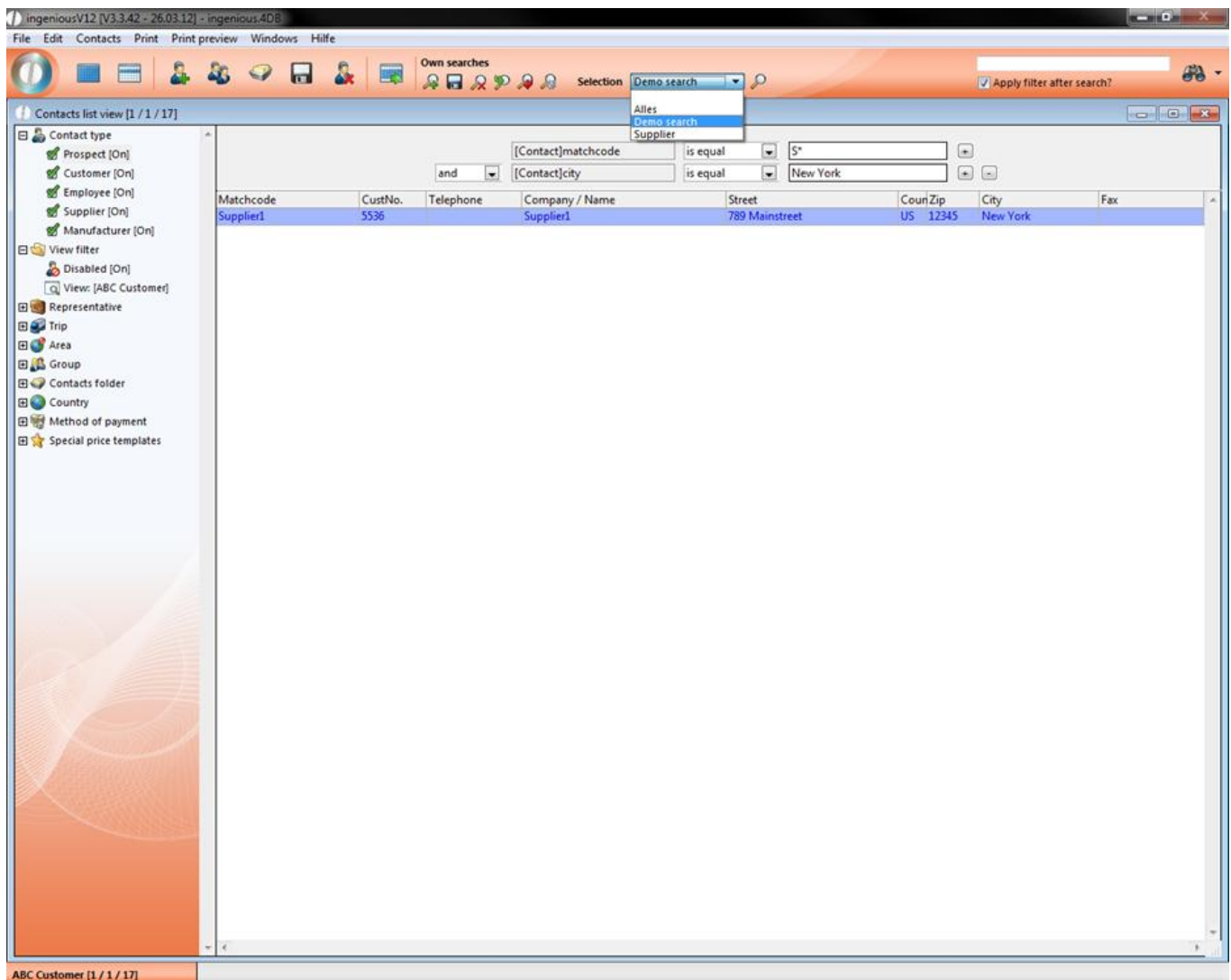


Saving queries


Another advantage of the detail search is, that you can save queries. To do so, just click on  in the icon bar "Own searches". Enter the name of your query:

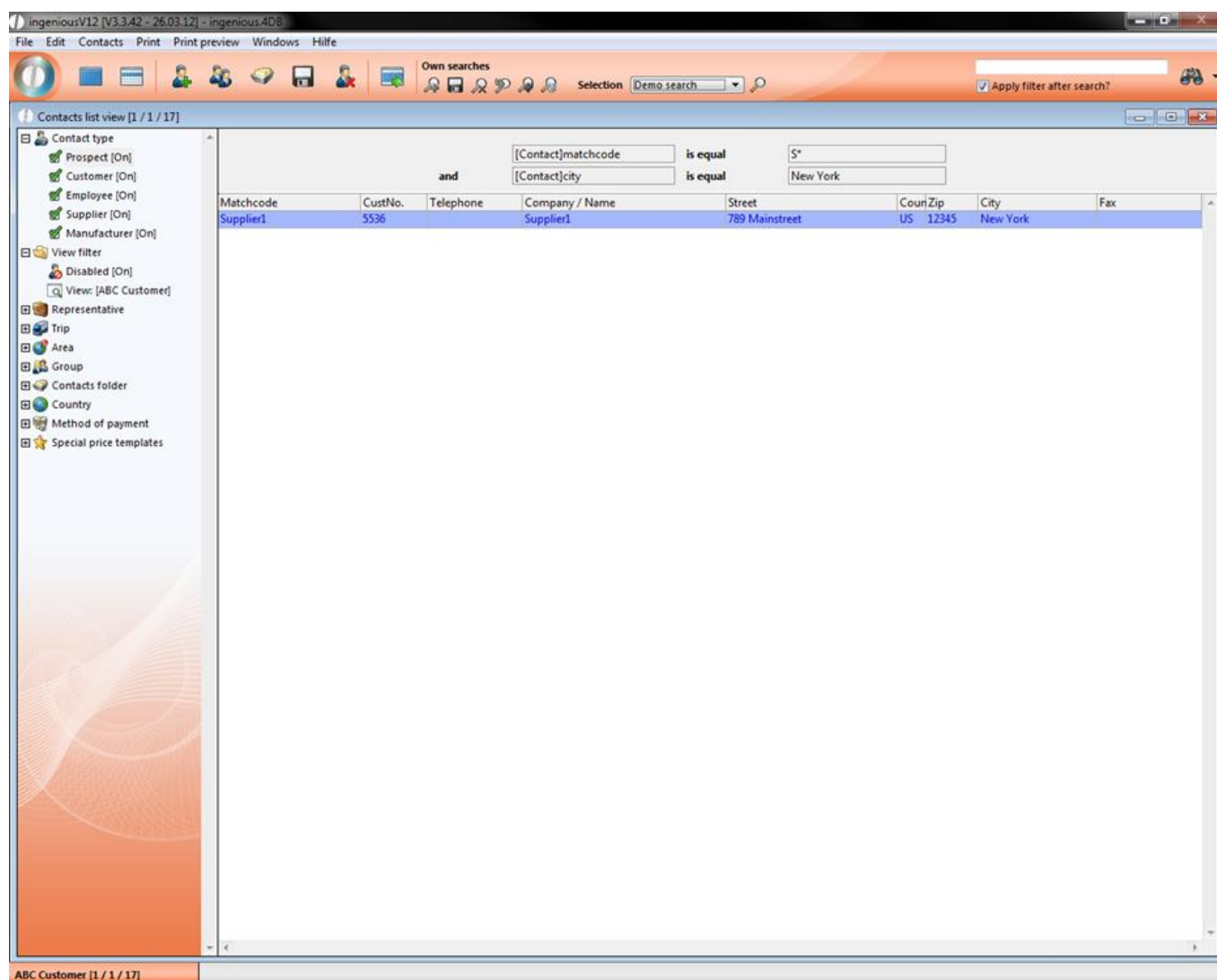


Now you can select it in the drop down field "Selection" in the icon bar to load it.

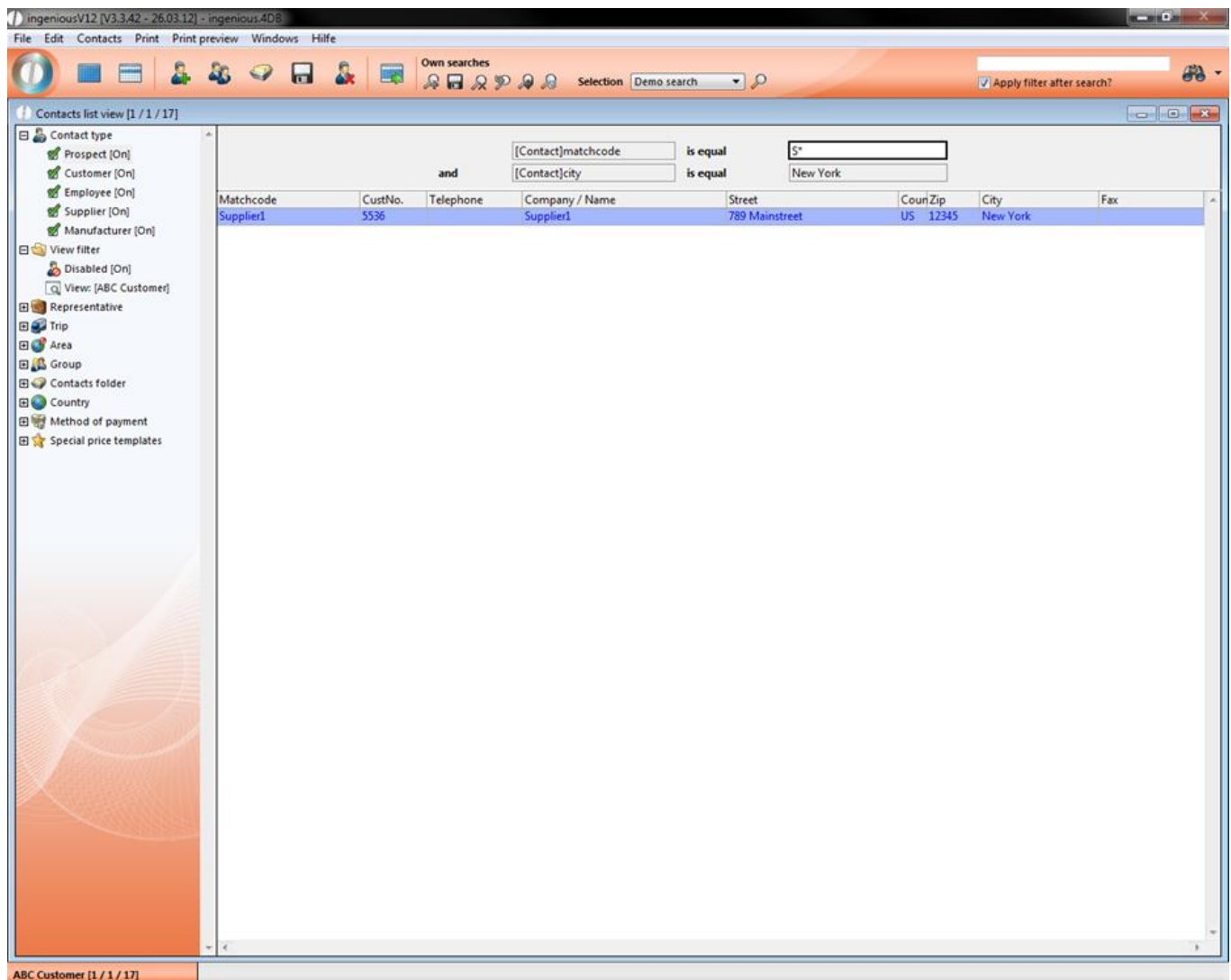


You can also export your query as a xml file or import an already saved one.

By clicking  you can toggle between the configuration mode and normal mode. In the configuration mode you can't change any search criteria.



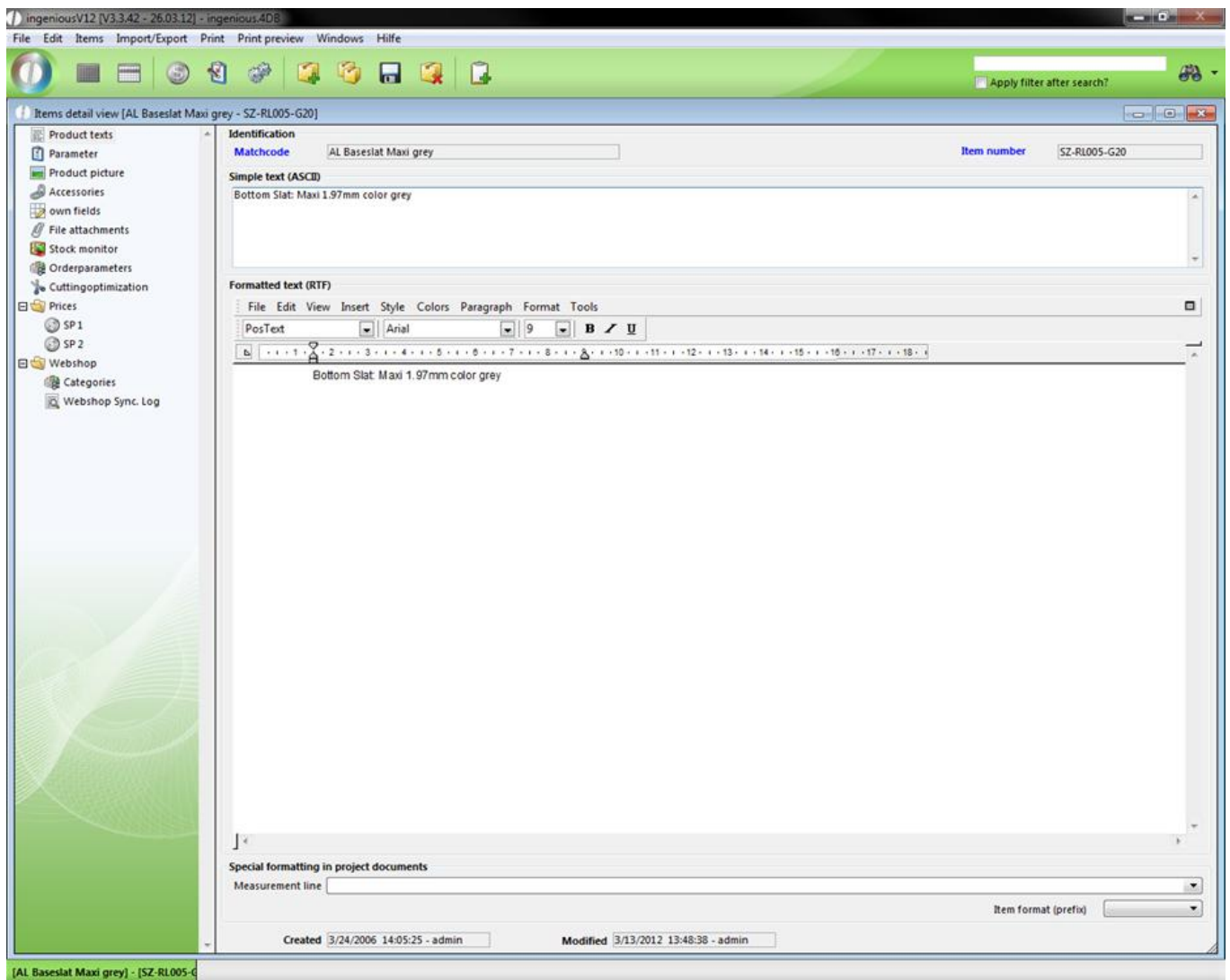
If you add a question mark in front of an entered value (e.g. ?S*), you are able to modify it in the configuration mode.



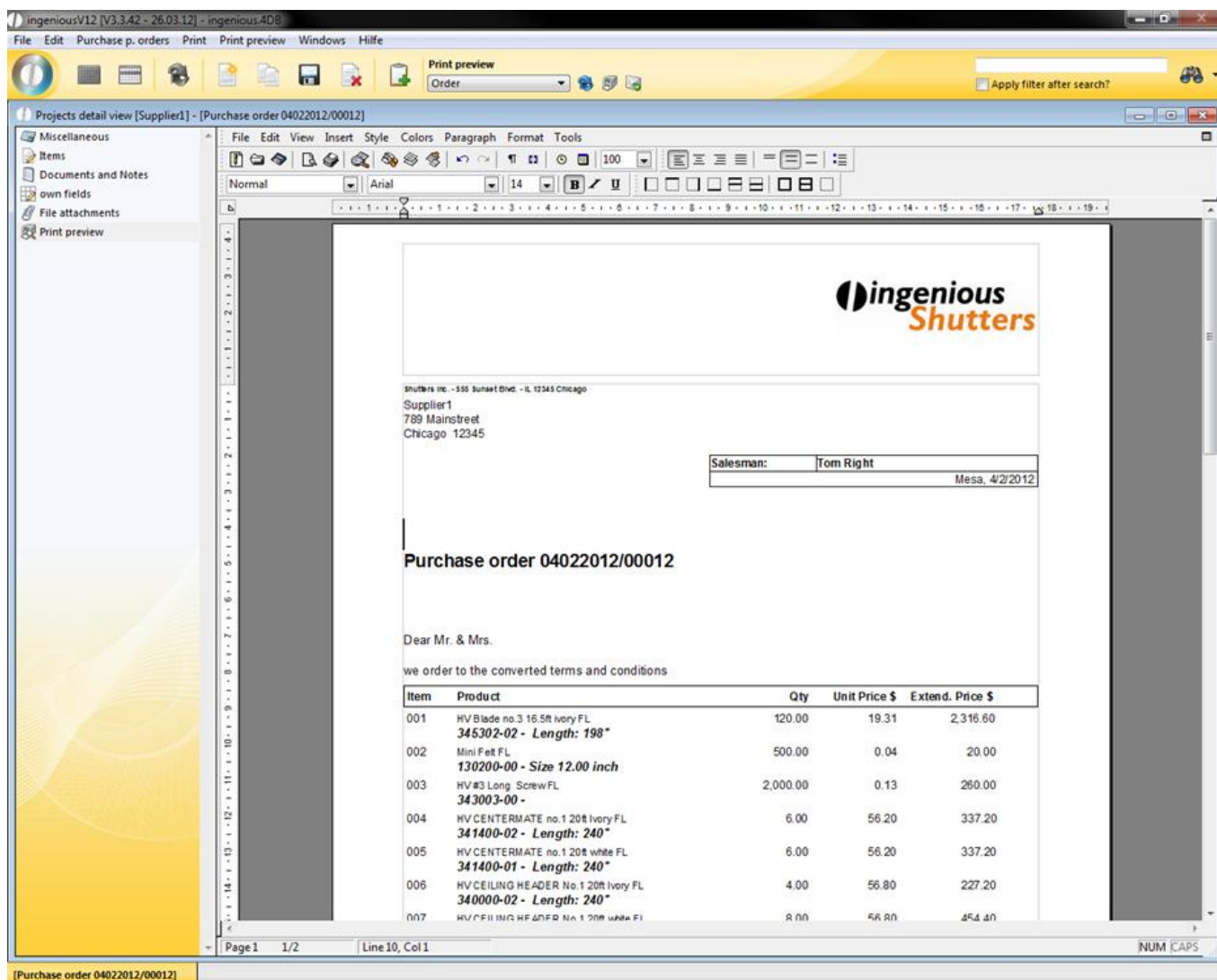
9.2 Word processing

Ingenious.V12 has integrated word processing in more than one location. It is accessible in the detail view of an article in the area "Formatted text (RTF) in the column "Item texts". You will also find word processing in the detail view of the workflow module and in the "Purchasing" module in the column "Print preview" in the header and footer text of the "Items" column of the work flow modules and in the text administration module.

Although word processing appears visually different from other word processing in the "Items" module, there is no difference in application and effectiveness.

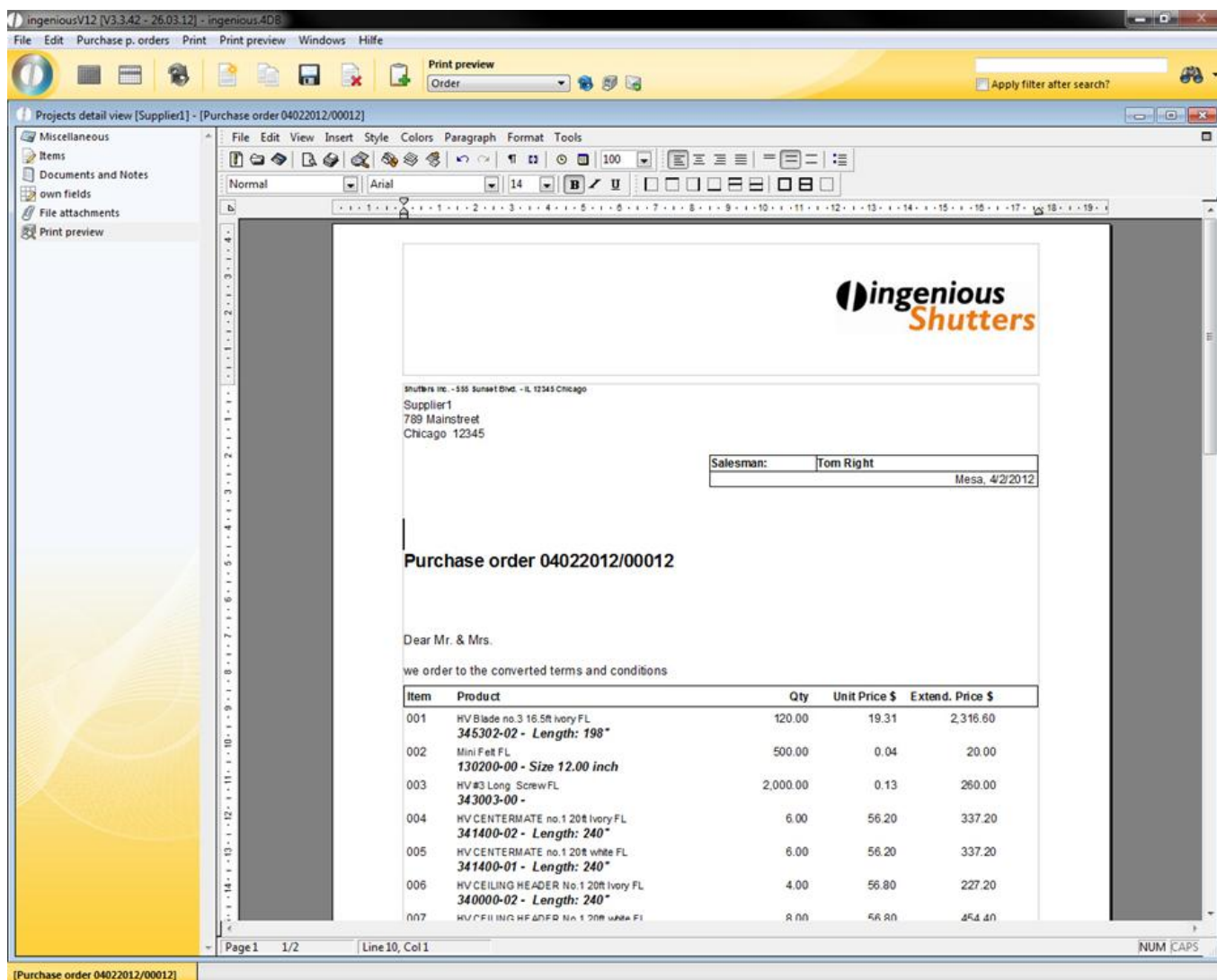


Word processing in the "Items" module



Word processing in the "Purchasing" module

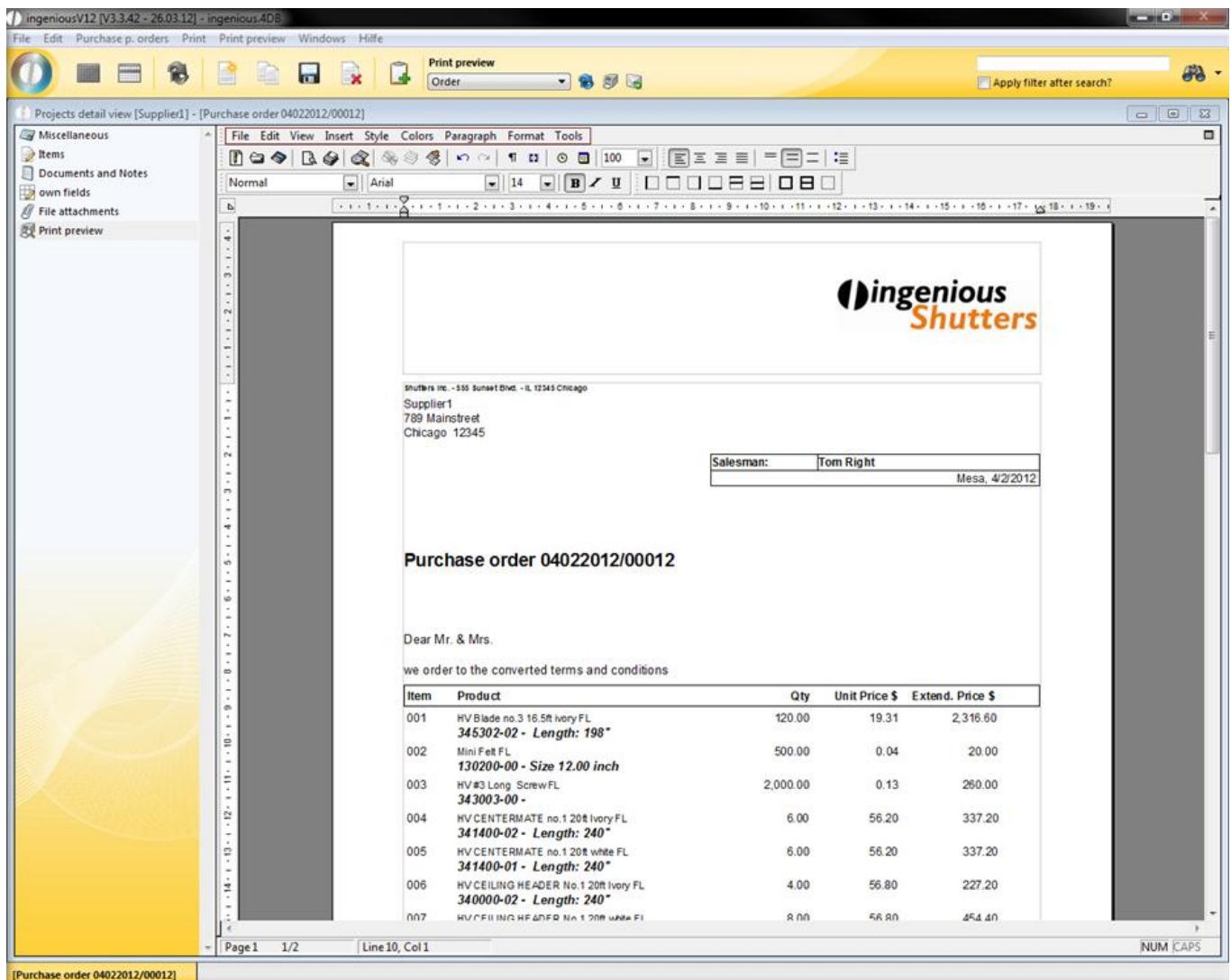
With word processing in the "Items" module, not all toolbars are displayed. This can be changed as necessary under the menu item "Displays/Toolbar..." in word processing.



Some of the functions of word processing can be accessed by key combinations. The key combinations are displayed in the menu next to the functions.

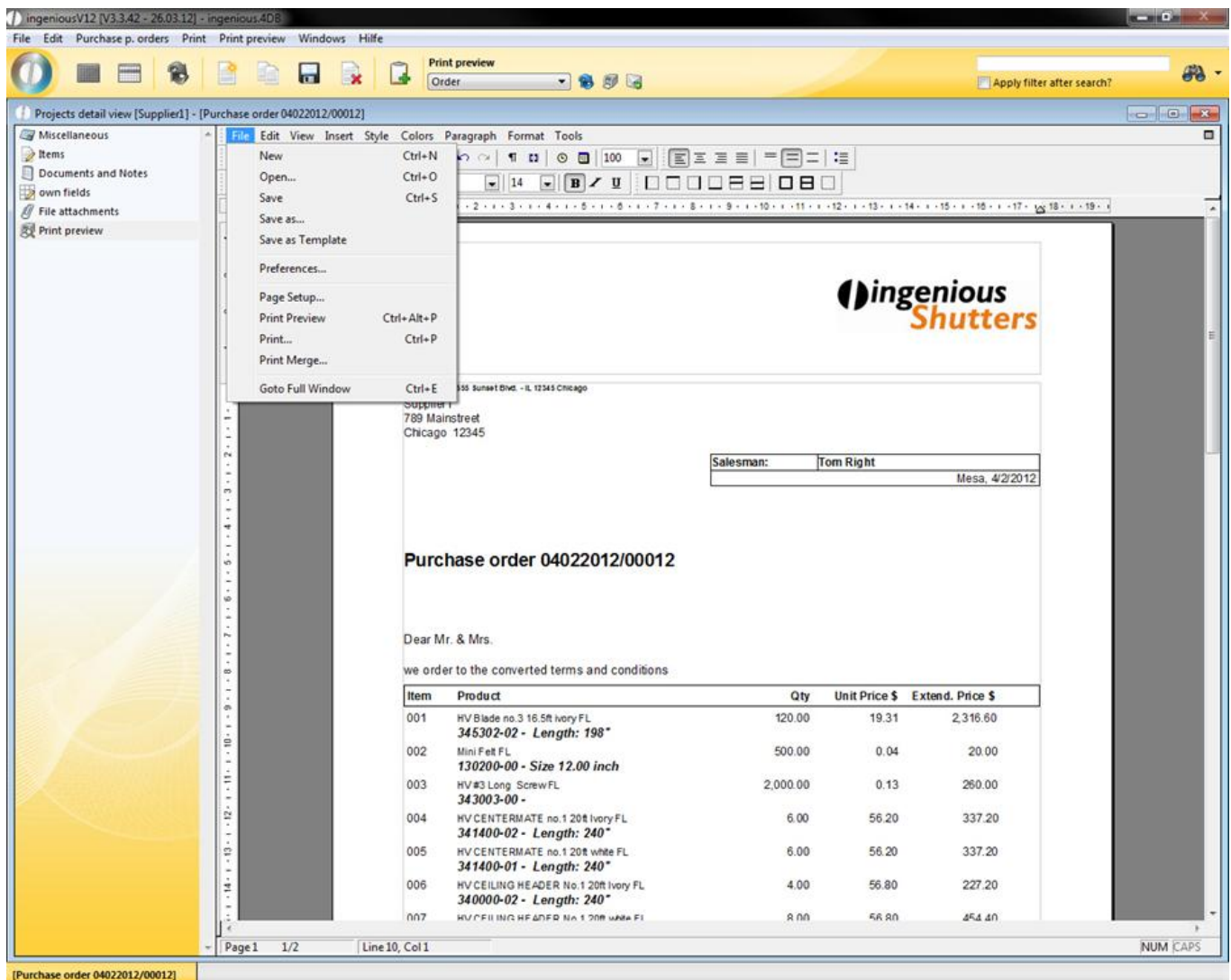
The menu bar

All formations and settings can be made in the menu bar while editing.



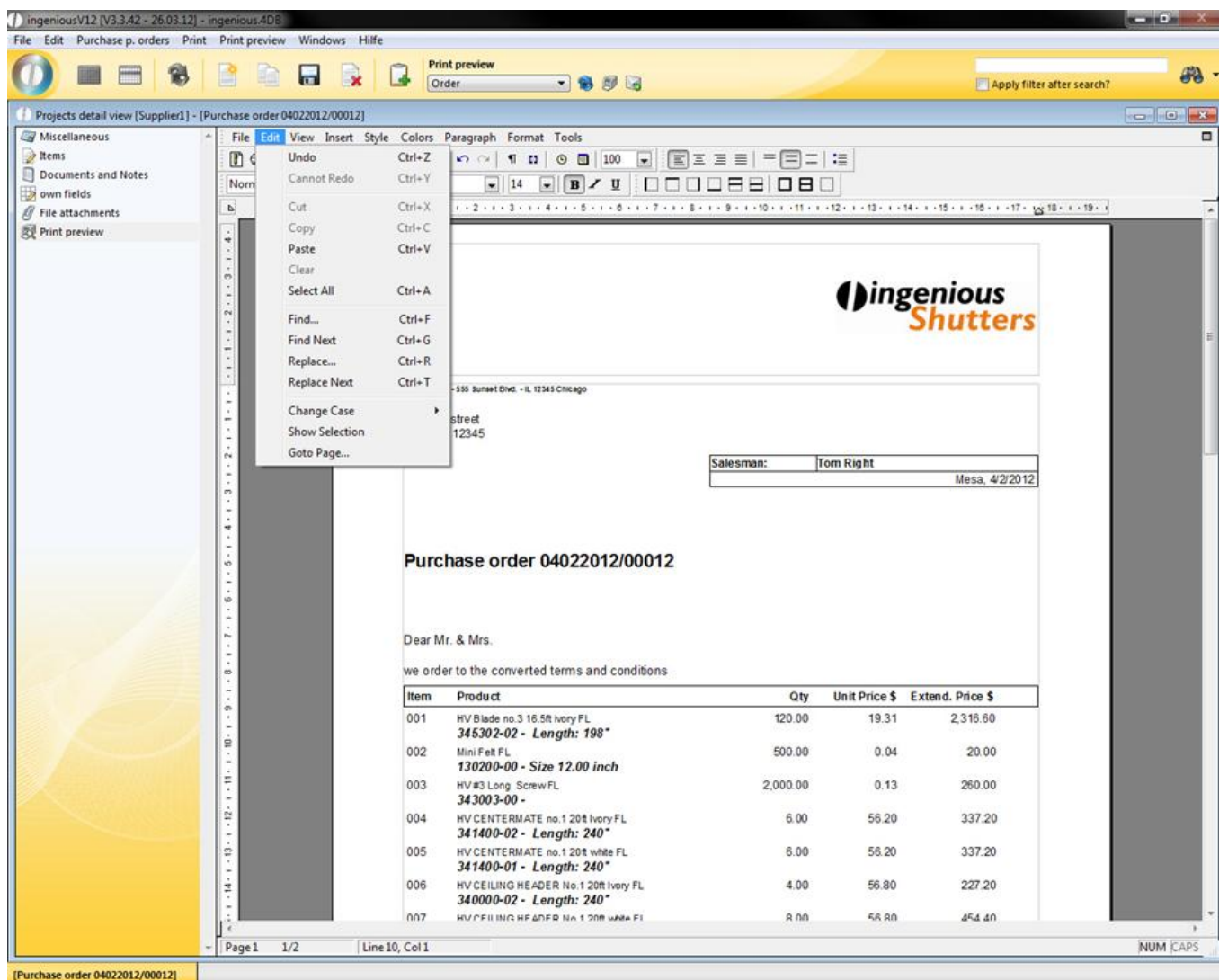
This consists of nine menu items that will be explained in more detail below.

Menu item "File"



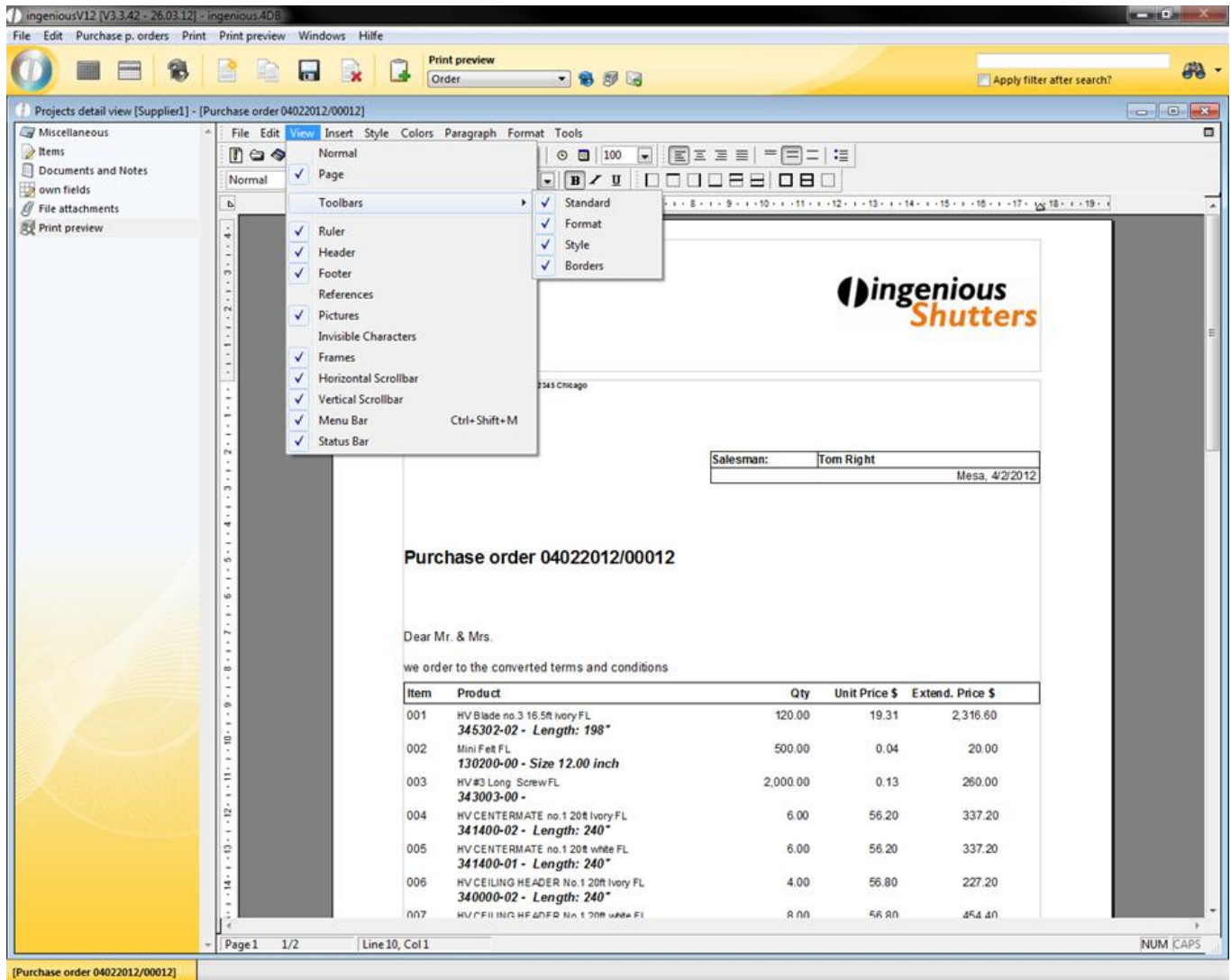
The menu item "File" is widely standardized. That means that you will find the commands "New", "Open", "Save", "Save as", "Page setup" and "Print" in most other word processing programs. In order to view a document that has been written with the integrated word processing from Ingenious.V12, i.e. in "Word" from "Microsoft", you must save it with the file ending in ".doc", ".rtf", or ".txt". Documents saved in this manner can be opened in almost all text editors. In order to view external data files in the word processing by Ingenious.V12, the documents should also be saved in one of the above mentioned three formats. Behind the command "Preset" there is a window, in which numerous settings for the document are available, such as the page number, or if there should be differences between individual pages. With the menu item "Print preview" a new window opens in which your current document can be viewed as a printed version. The menu item "Entire window" enlarges the area of word processing to almost a full screen format, in order to also have an overview with larger texts.

Menu item "Edit"

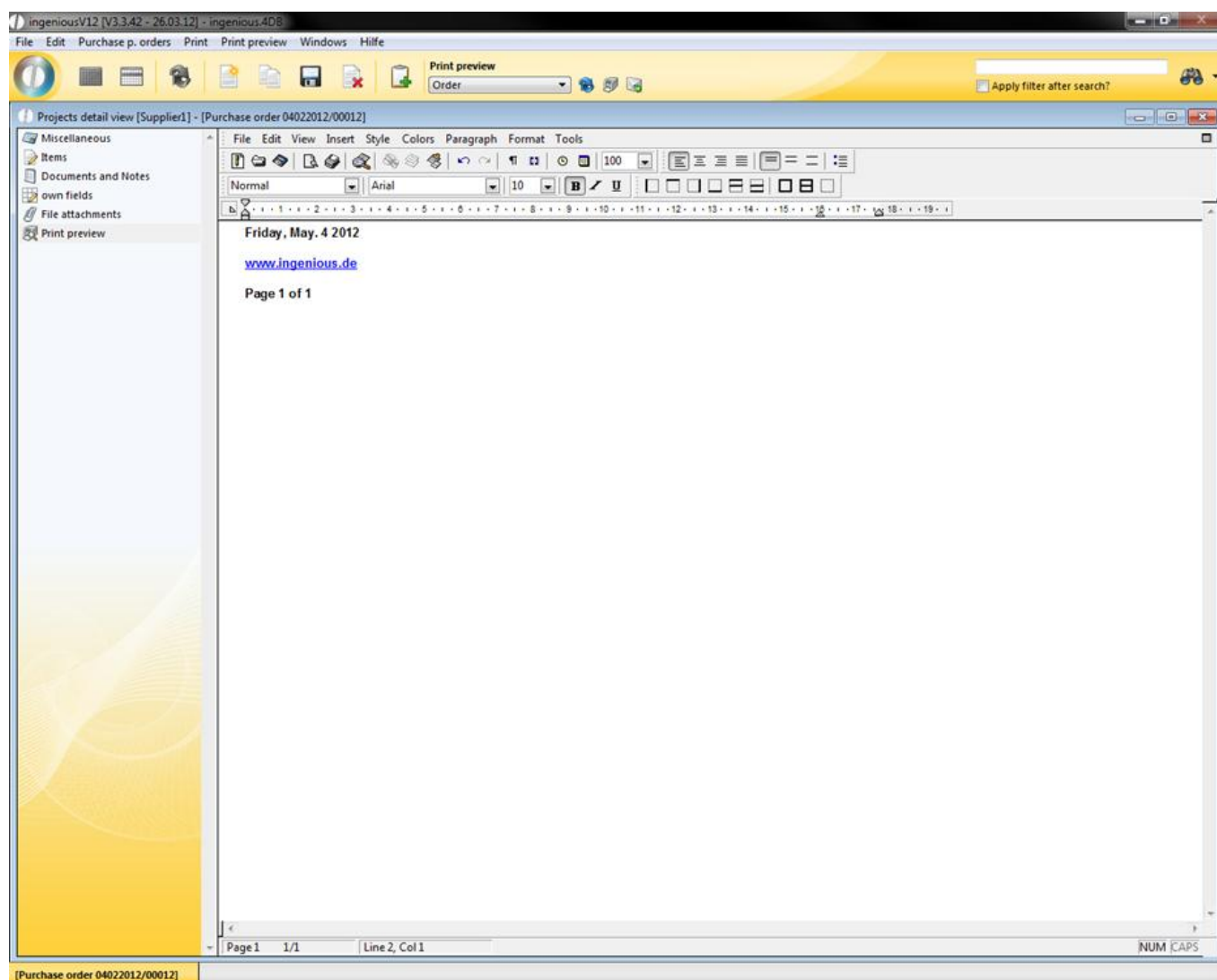


In the menu "Edit" you will also find numerous standard entries. Here the entries "Upper case letters", "Display selection" and "Go to page..." are distinctive features. Behind "Upper case letters" there are formatting possibilities for highlighted texts. Here you have the choice between ALL CAPS and all lower case. Only the beginning caps and ONLY THE BEGINNING LOWER CASE. With the "Go to page..." entry, a quick jump to the next page is always assured. Now scrolling across several pages is a thing of the past.

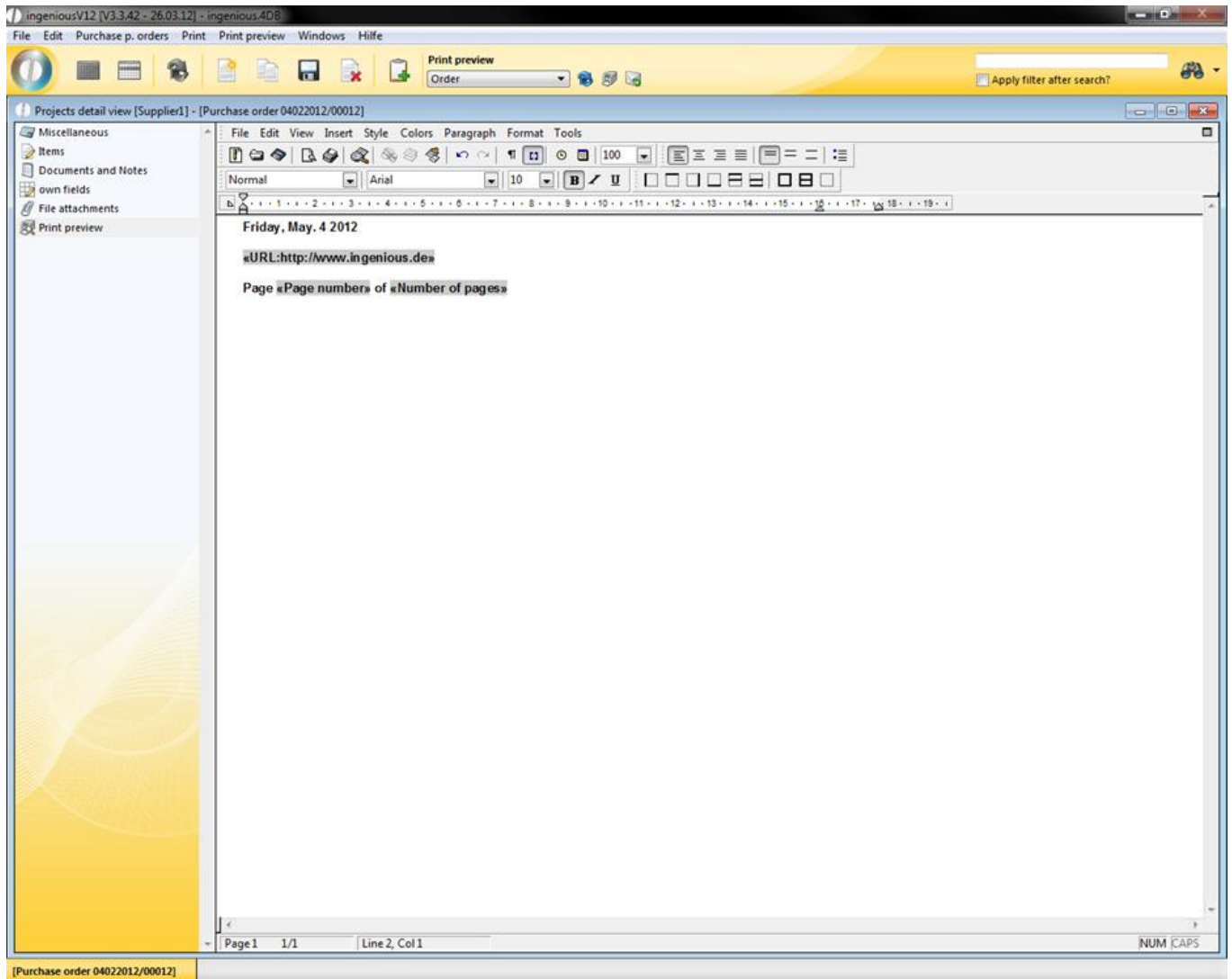
Menu item "View"



In this menu, there are numerous entries that facilitate the precise creation of documents such as the entries "Normal" and/or "Page" for example. From these two items, only one can be active and is recognizable by the checkmark. The standard setting is "Normal". If one selects "Page" the entire page to the margin is displayed. In addition, the areas for header and footer text and main text are shown separately. In the menu item "Toolbar" there is the possibility to expand or minimize the toolbar with the symbol groups "Format", "Style" and "Borders". With the "Ruler" entry you can display or remove the ruler shown in the upper margin. With this ruler you have the possibility to precisely align the texts and specify your own tab stops. With the menu item "References" you can determine how the references can be displayed. In addition, the areas for the header and/or footer and main text are separately displayed. Behind the menu item "Toolbar" you have the possibility to expand or minimize the toolbar with the icon groups "Format", "Style" and "Frame". With the entry "Ruler" you can display or remove the ruler shown in the upper margin. With this ruler you have the possibility to align the texts precisely and specify your own tab stops. With the menu item "References" you can determine how the references can be displayed. References are links to the fields whose values are variable, such as the fields for date, time, hyperlinks, 4D printouts, HTML printouts and page numbers, for example.



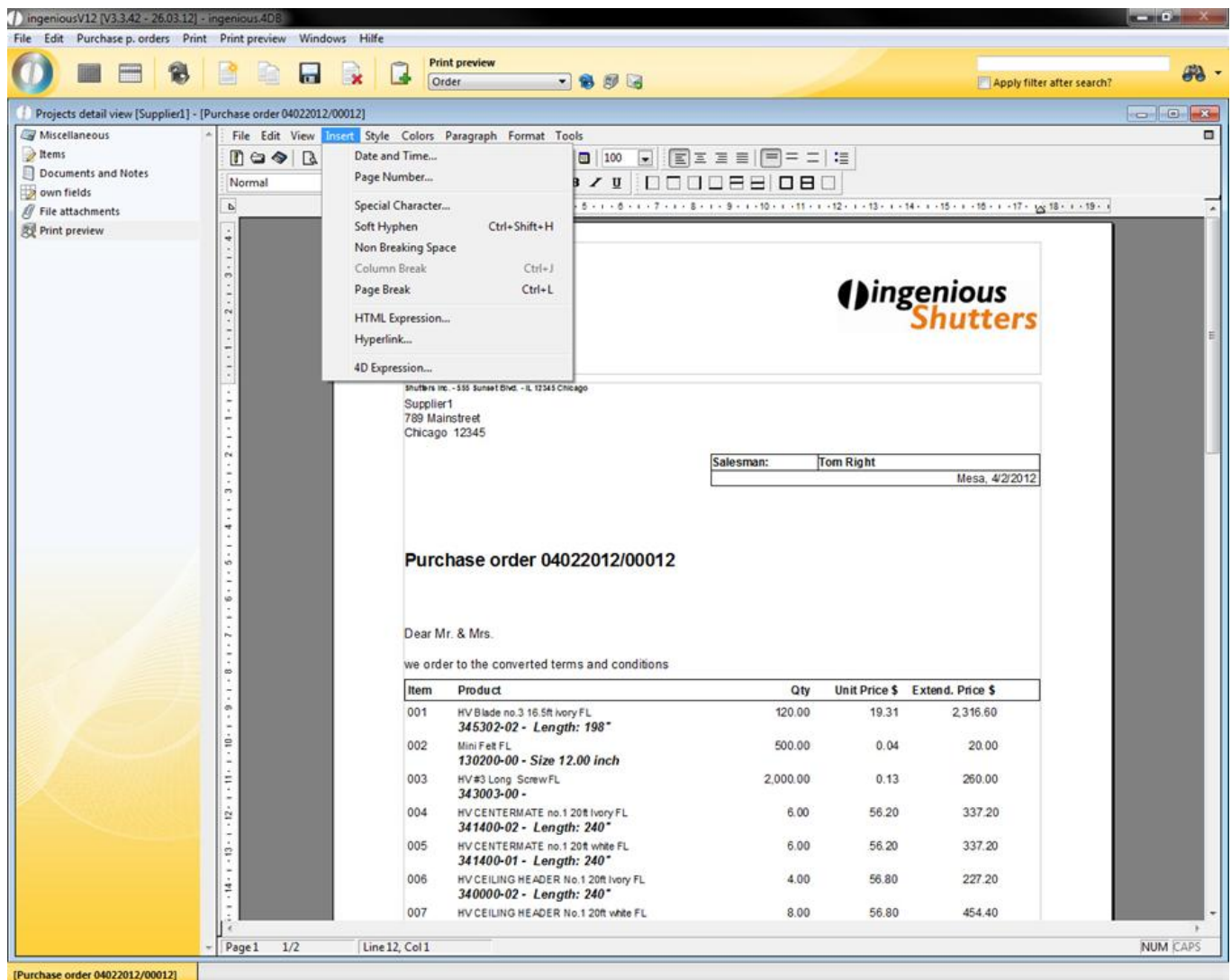
References not displayed



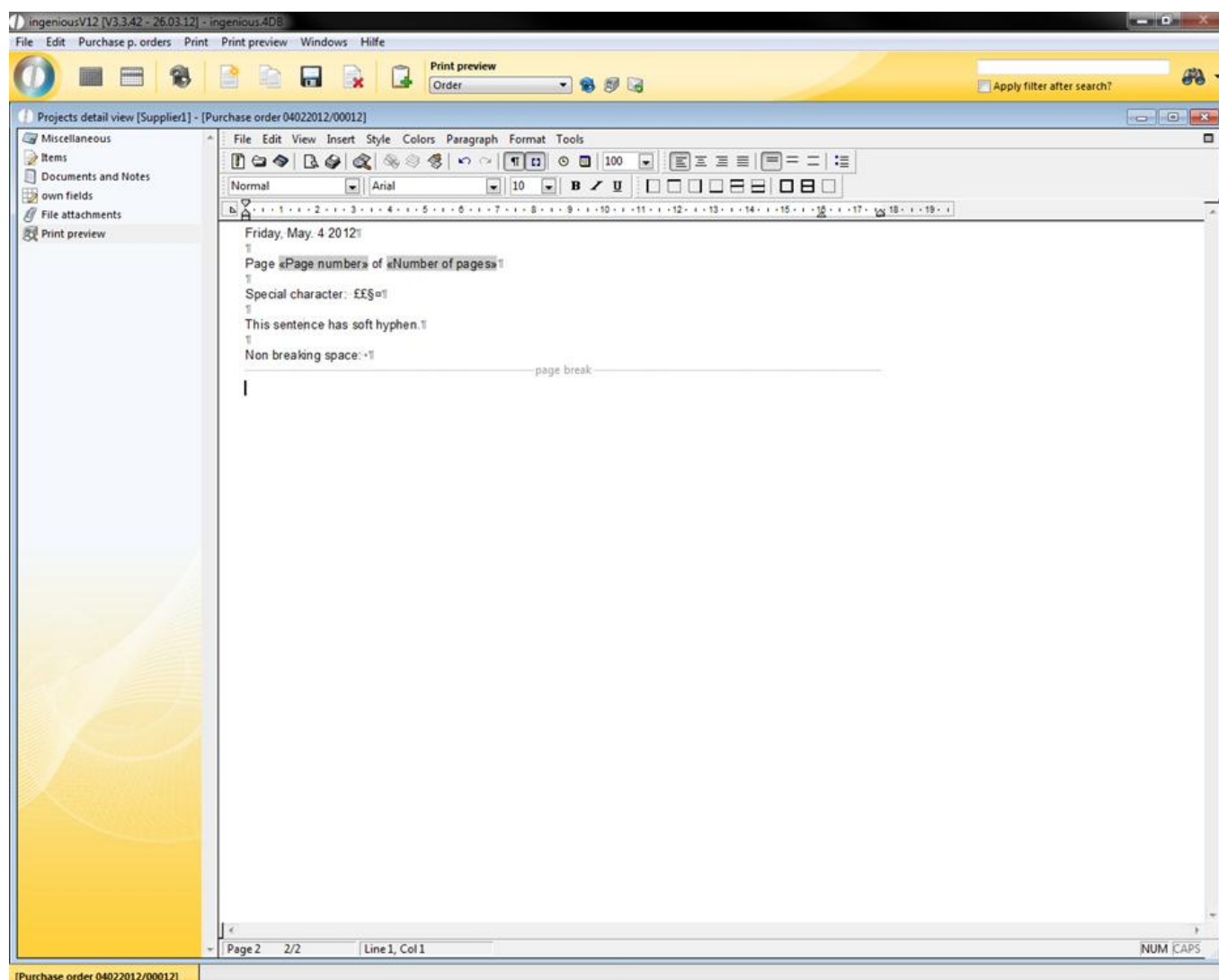
References displayed

When you display the references, you recognize to which internet page the hyperlink leads. When you erase the standard checkmark in the field "Images", no pictures will be shown or printed in the document. The pictures remain in the document and can be displayed again as necessary (place checkmark). With the "Vertical picture status bar" entries, you can activate or deactivate the moving possibilities of the visible area of your document. Also, the "Menu bar" can also be removed with the same named entry. That is not advisable because it is only available with a new opening of the text editor. The "Status bar" offers you additional information for the document, such as on which page, which line and on which column you are.

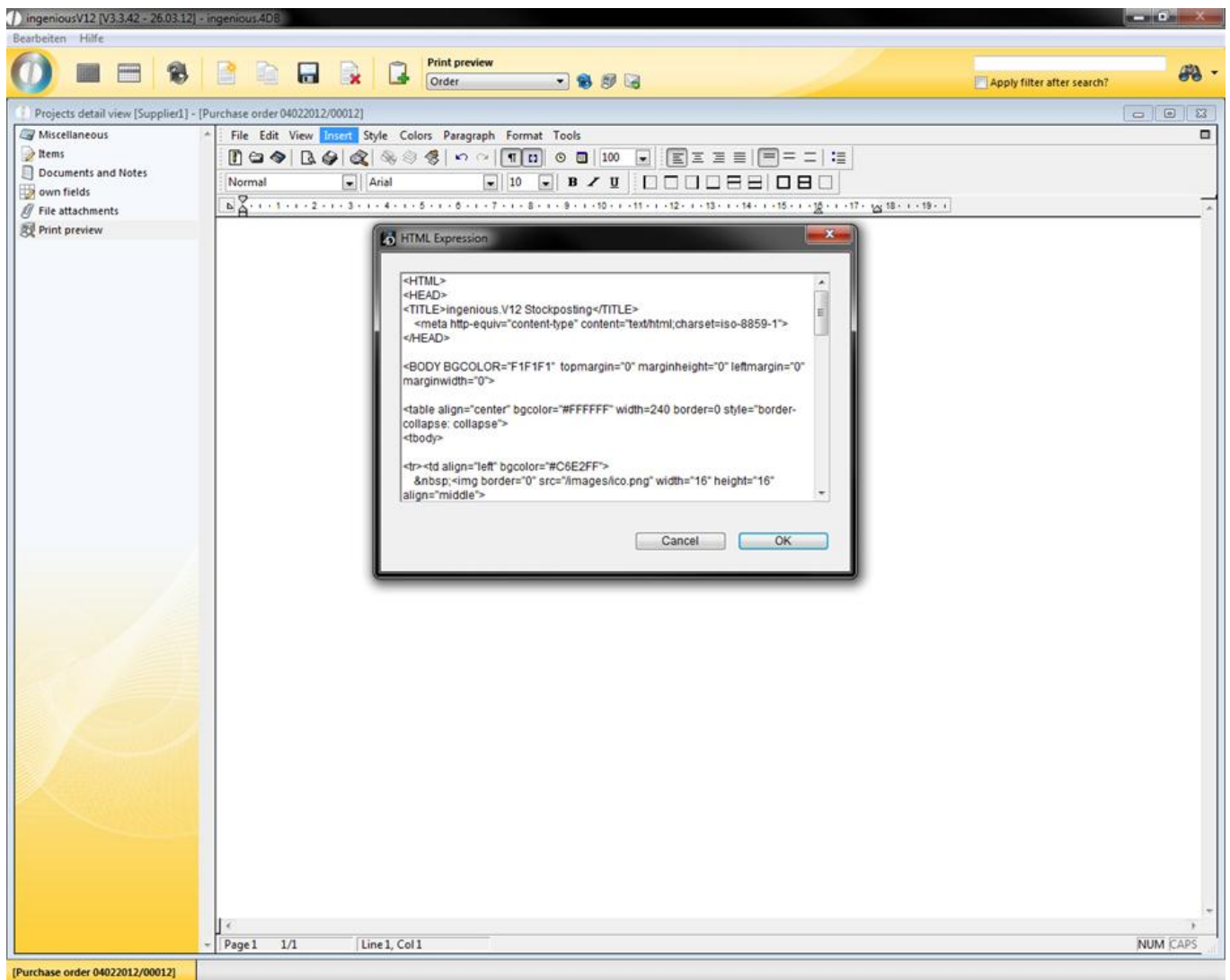
Menu item "Insert"



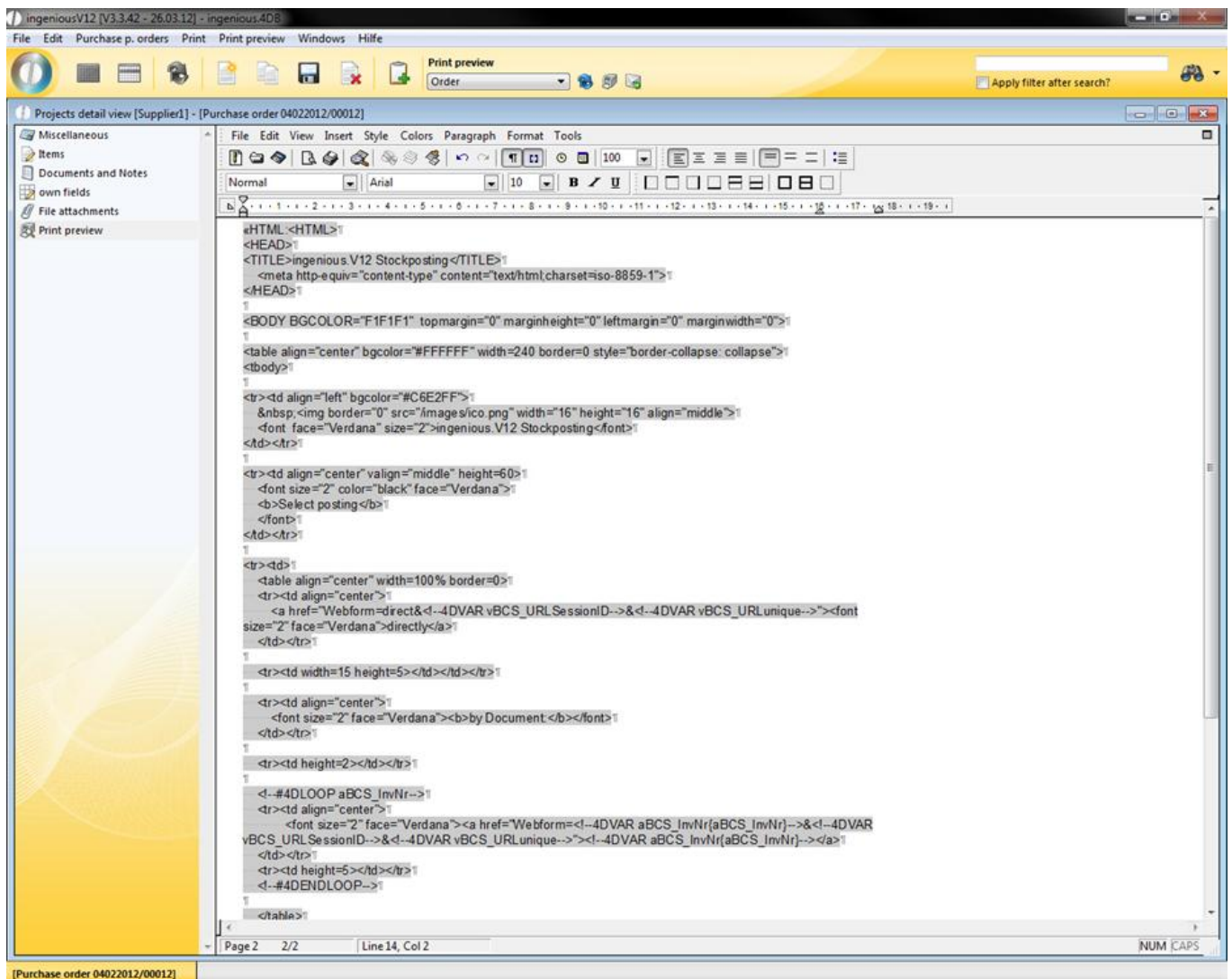
The first entries in this menu are "Date and time..." and "Page number...". With these two menu items, you can insert the current date with the current time (according to computer clock) and/or the page number, with the current cursor position. If you select the menu item "Special characters", a window opens in which diverse characters such as B. ©, §, ¾, Š, £, ¥, % ¢, ¤ are available. The entry "Flexible hyphenation" inserts an invisible character at the current cursor position that is responsible for the separation of words. With the "Fixed space" option, you can insert a space that appears as a normal character in word processing. That means that words that are connected to a space are considered as one word and therefore cannot be separated at the end of a line. The entry "Page break" determines that the following texts will be written on a new page.



The "HTML Print-out" item offers you the possibility to create an HTML code. However, this code is not visible in the normal view of the document. In order to see it, you must select the option "References in the in the "Display" menu.

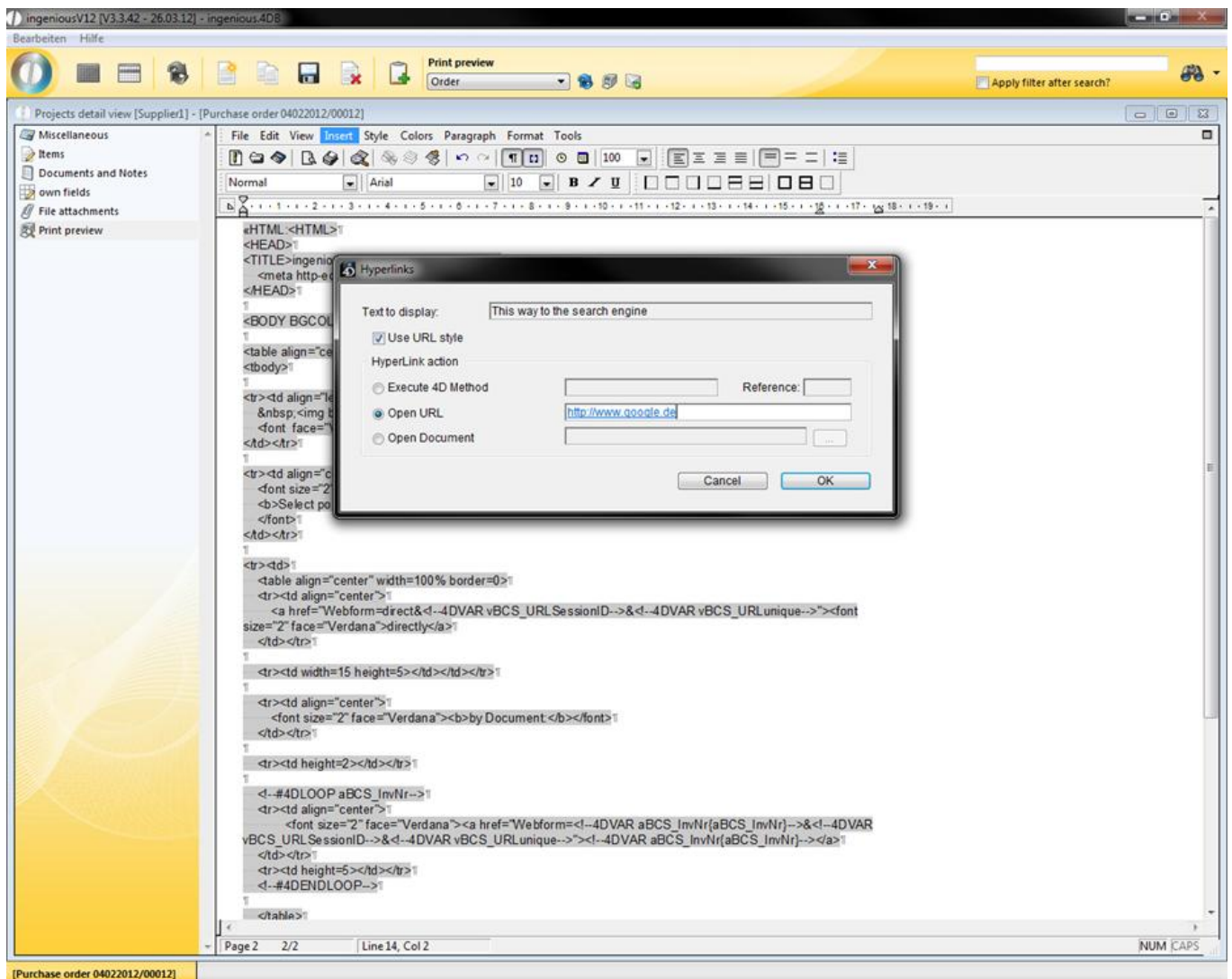


Window to compose an HTML code

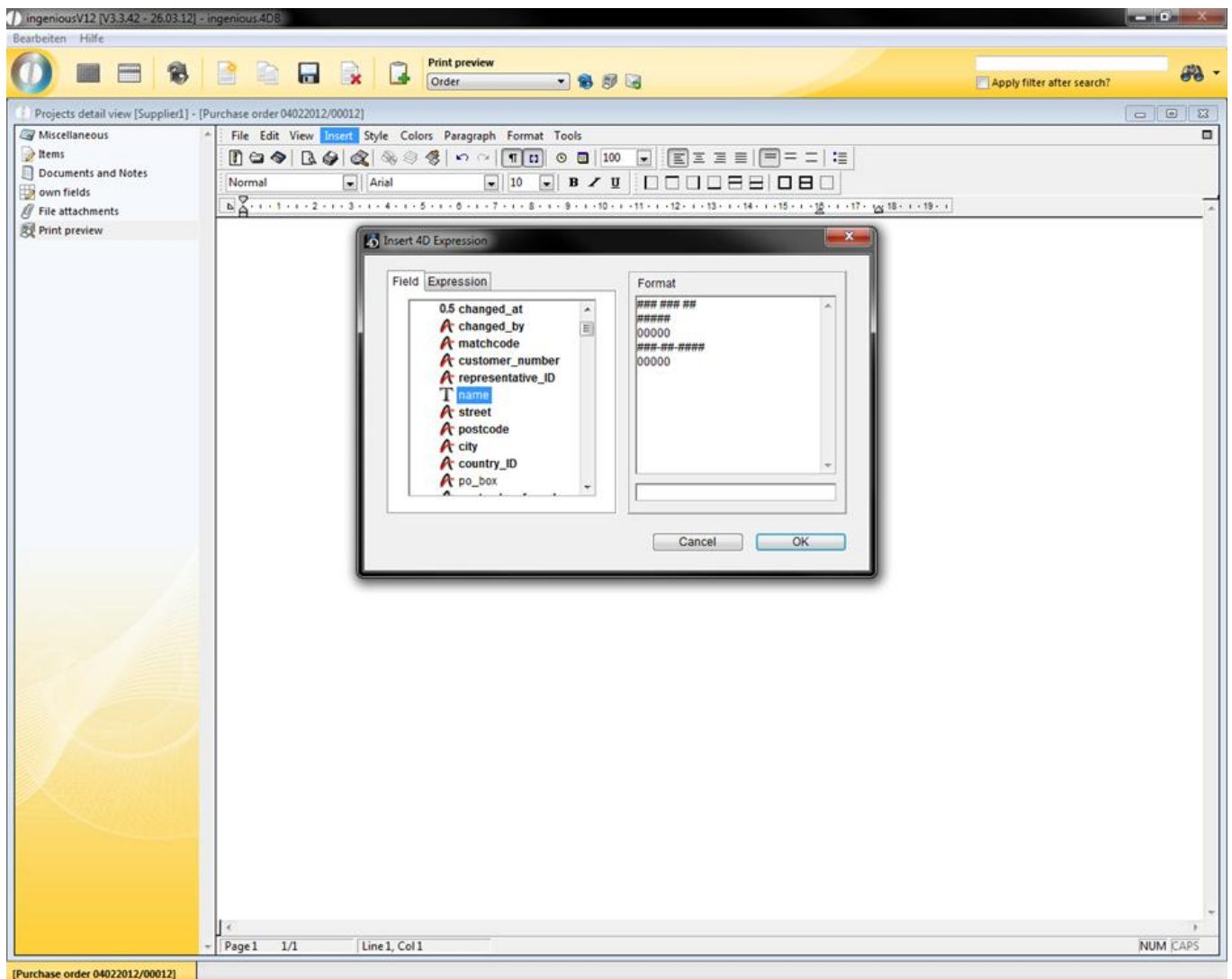


View of the HTML code as a reference

In order to create a HTML document from another document, you must save it as such. Your "Browser" can display it then as an internet page. With the menu item "Hyperlink" you can link actions to certain words.



In the above example, a browser window would open with the appropriate internet page if there is an internet connection by clicking on the text "This way to the search engine". The menu item "4D printout" makes it possible to transfer fields from the database to the document. They are a link to the database of Ingenious.V12. That is very helpful for serial print-outs, for example. In the following example, a header is created with the help of 4D printouts.

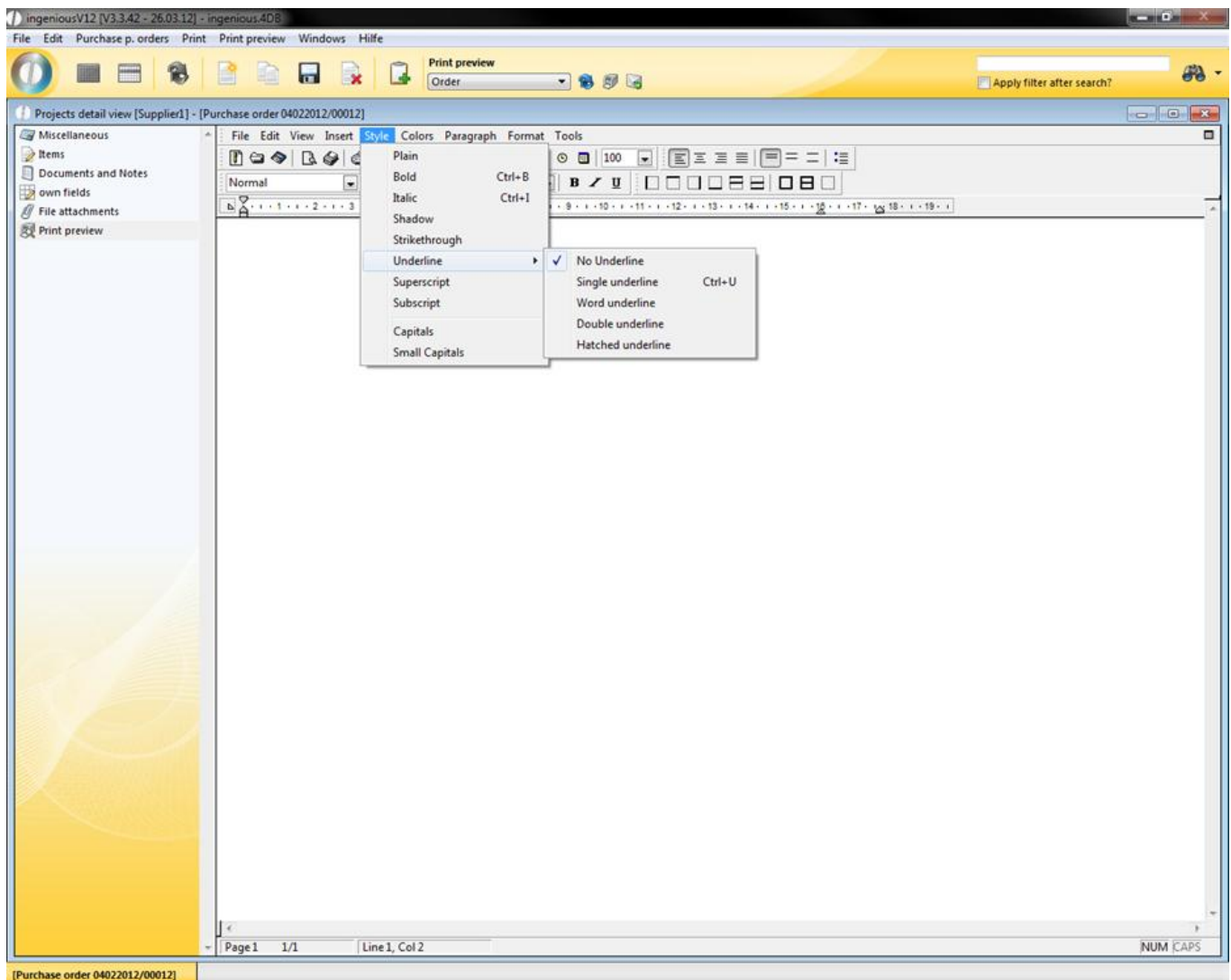


Window for entering 4D printouts

This letterhead is dependant on the current record, as well as on the current date.

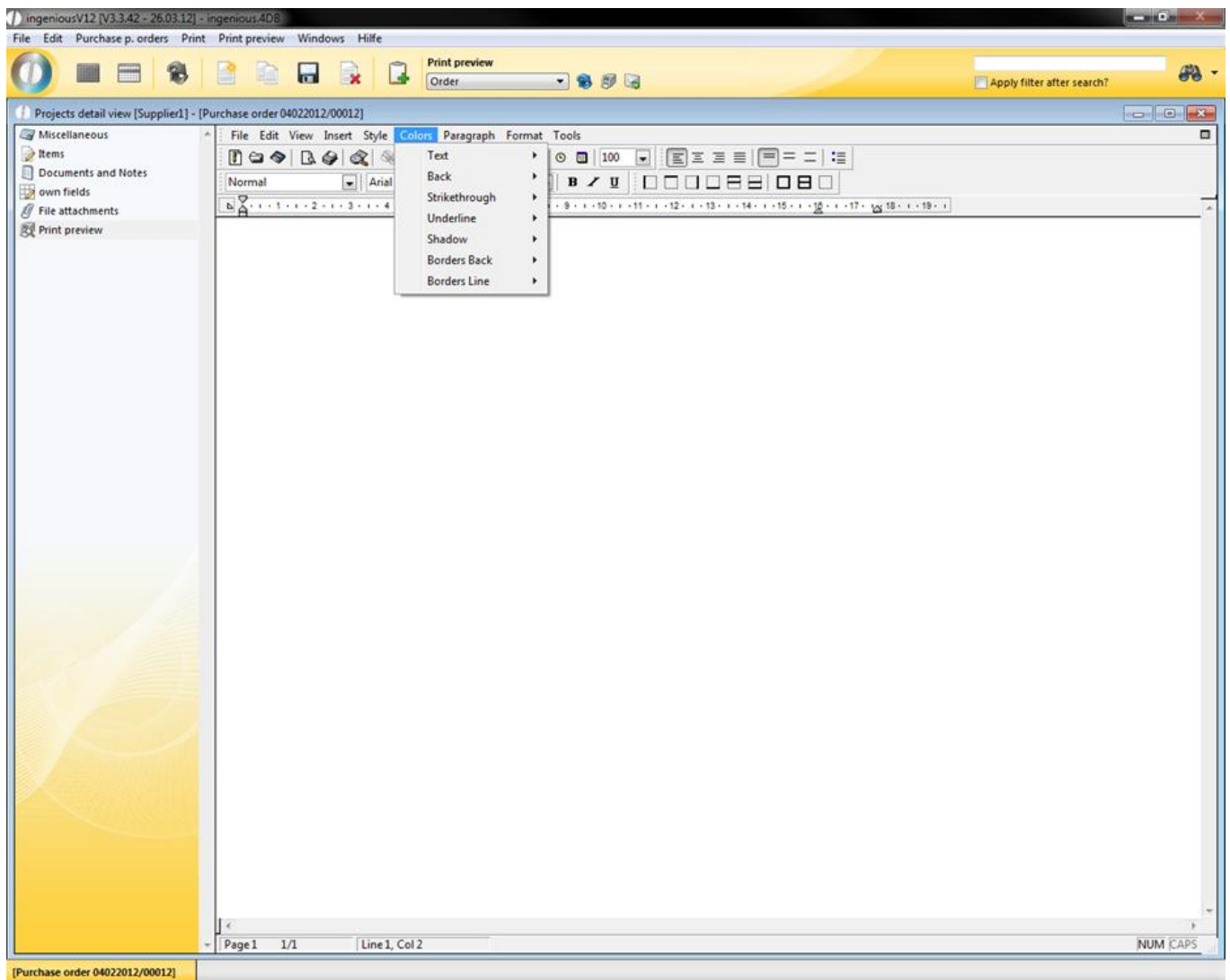
Tip: If you copy the text and insert a different record, you only have to complete the menu item "Tools/Calculate references now" and references will automatically upgrade your values.

Menu item "Style"



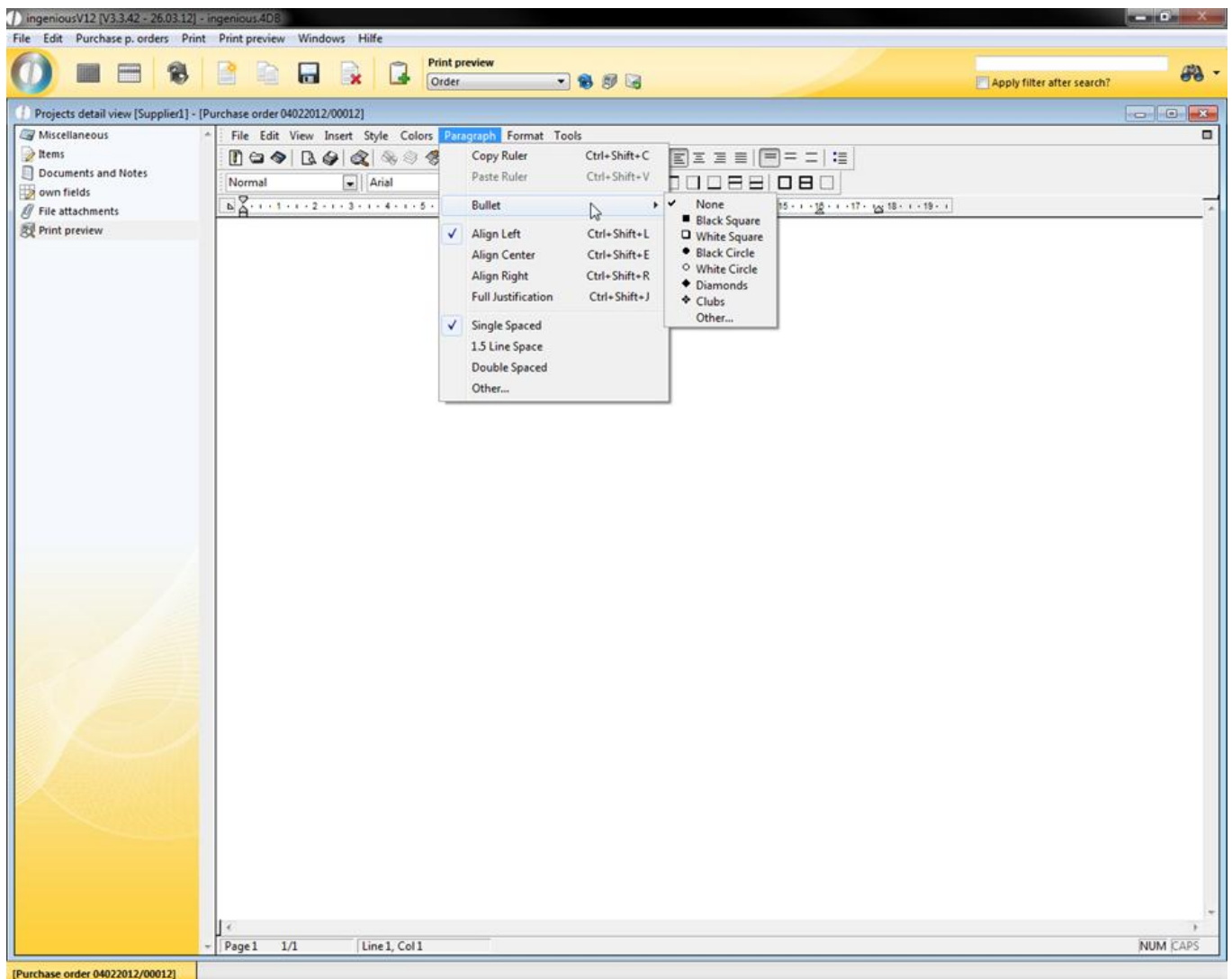
In the menu item, "Style" you will find numerous possibilities to format a highlighted area. Thus you can underline texts in different variations or set them as high and/or low. In the menu item "Capital letters" you indicate to the editor that all letters must be capital letters. Behind "Caps" there is a hidden preset text (i.e.: in this line caps are unlocked. IN THIS LINE CAPS ARE LOCKED).

Menu item "Colors"



In the "Color" menu item you have comprehensive possibilities to create a document in the colors that you desire.

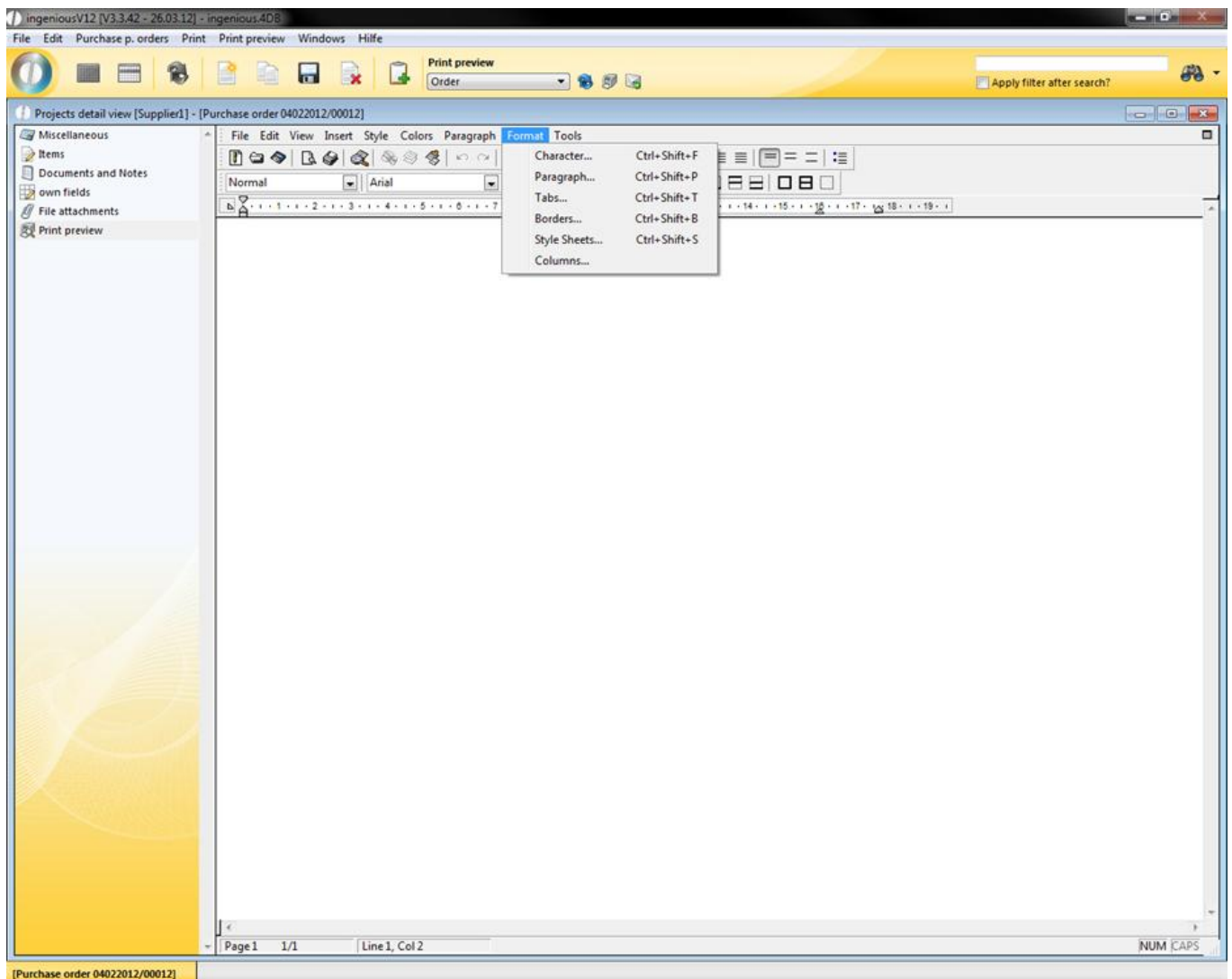
Menu item "Paragraph"



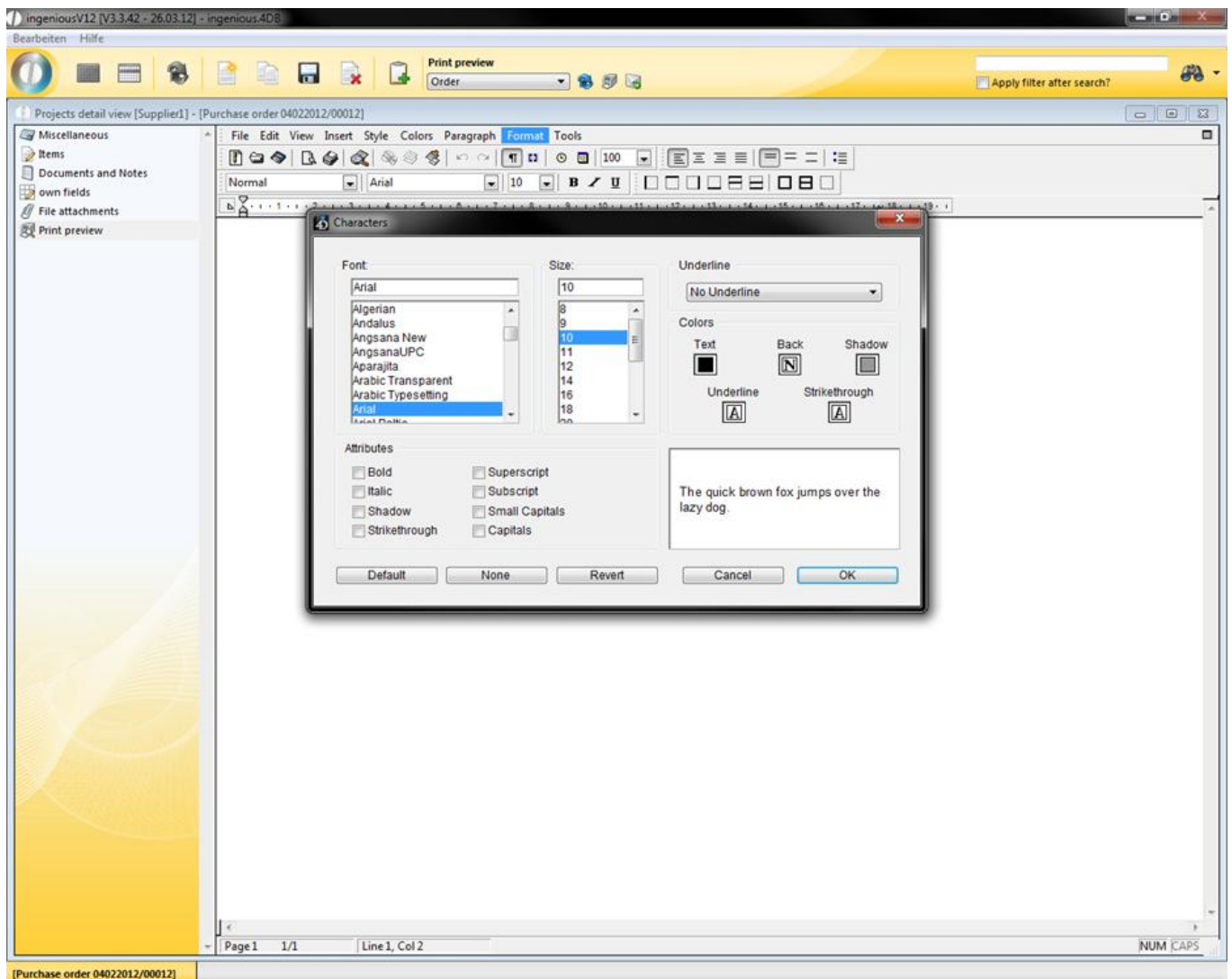
In the "Paragraph" menu item you will find setting possibilities to modify line spacing and justification of paragraphs. In addition, you can select the form of the numeration symbol (bullet).

The "Copy ruler" entry saves the setting of the ruler, as well as the beginning and end of the document, as well as the preset tabs. "Insert ruler" modifies the current ruler setting to the saved setting.

"Format" menu item

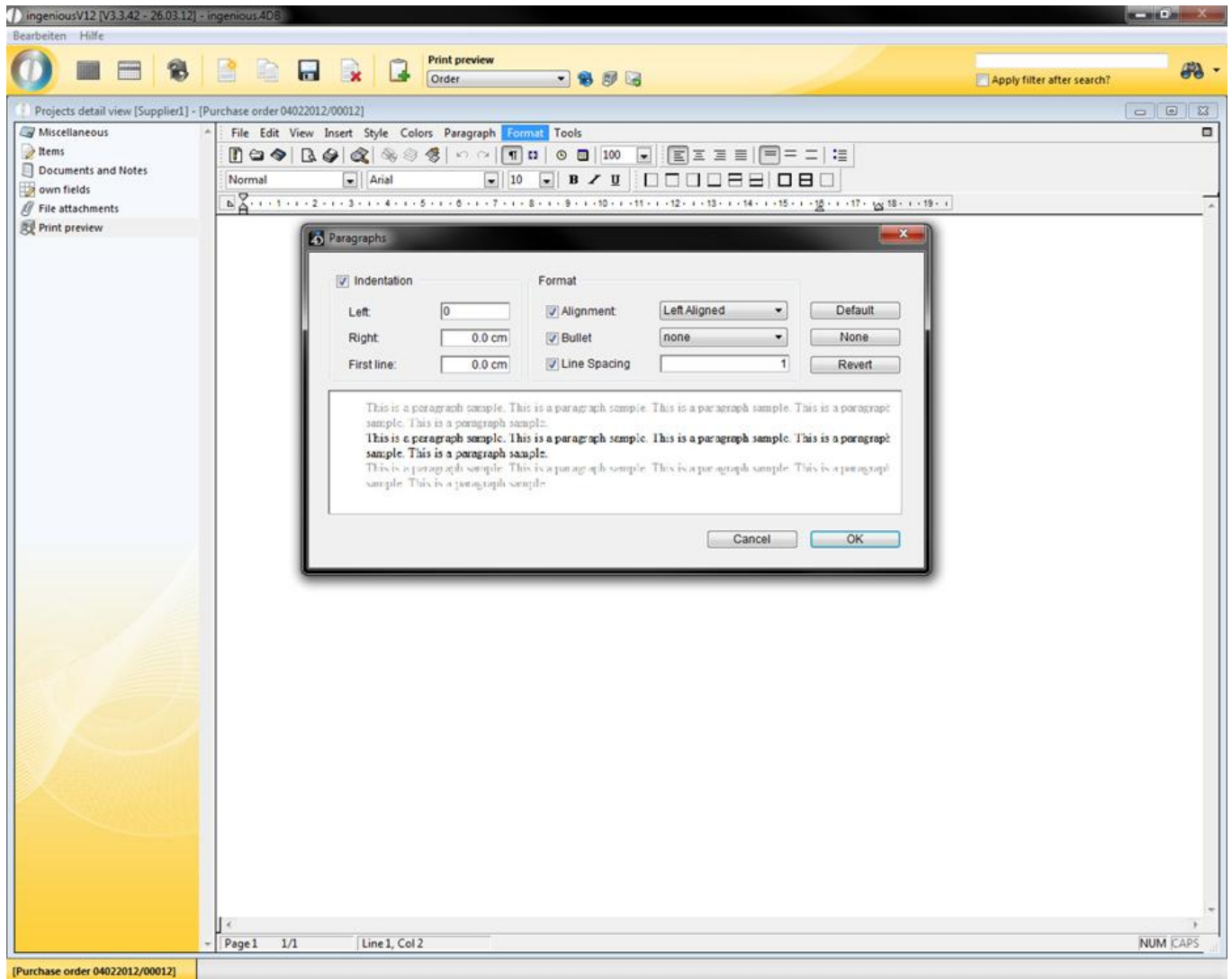


As the name implies, the “Format” menu contains all the possibilities for formatting your document. With the help of the sub points of this menu, you can insert columns into the document, create style models, set frames and specify paragraphs. You also can change font styles and font sizes. Behind the “Characters” menu item, a window is hidden with numerous possibilities for forming a text.



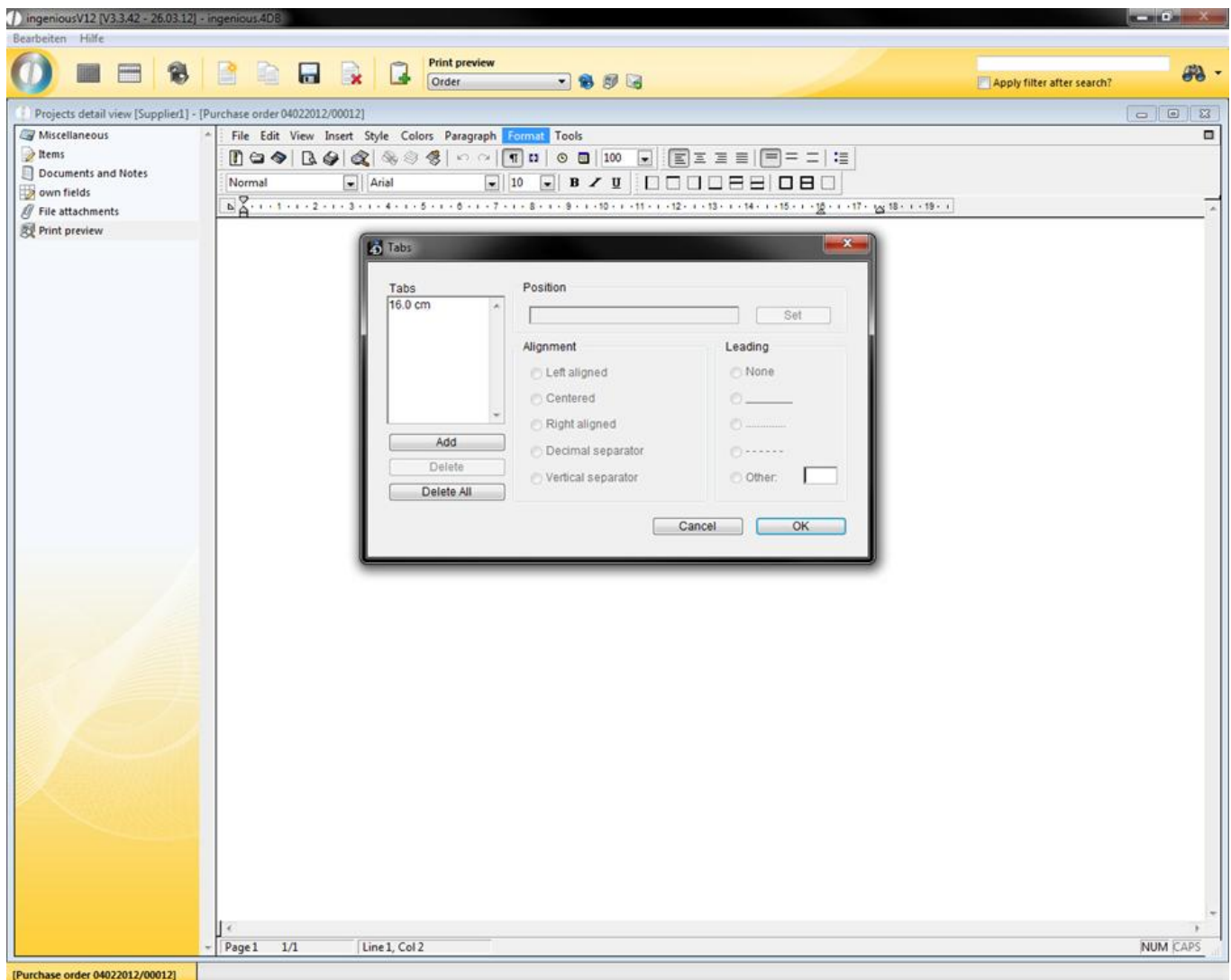
Window for formatting texts

Paragraphs can be edited with the "Paragraphs" menu. Here you have the possibility to set the text size, justification and line spacing.



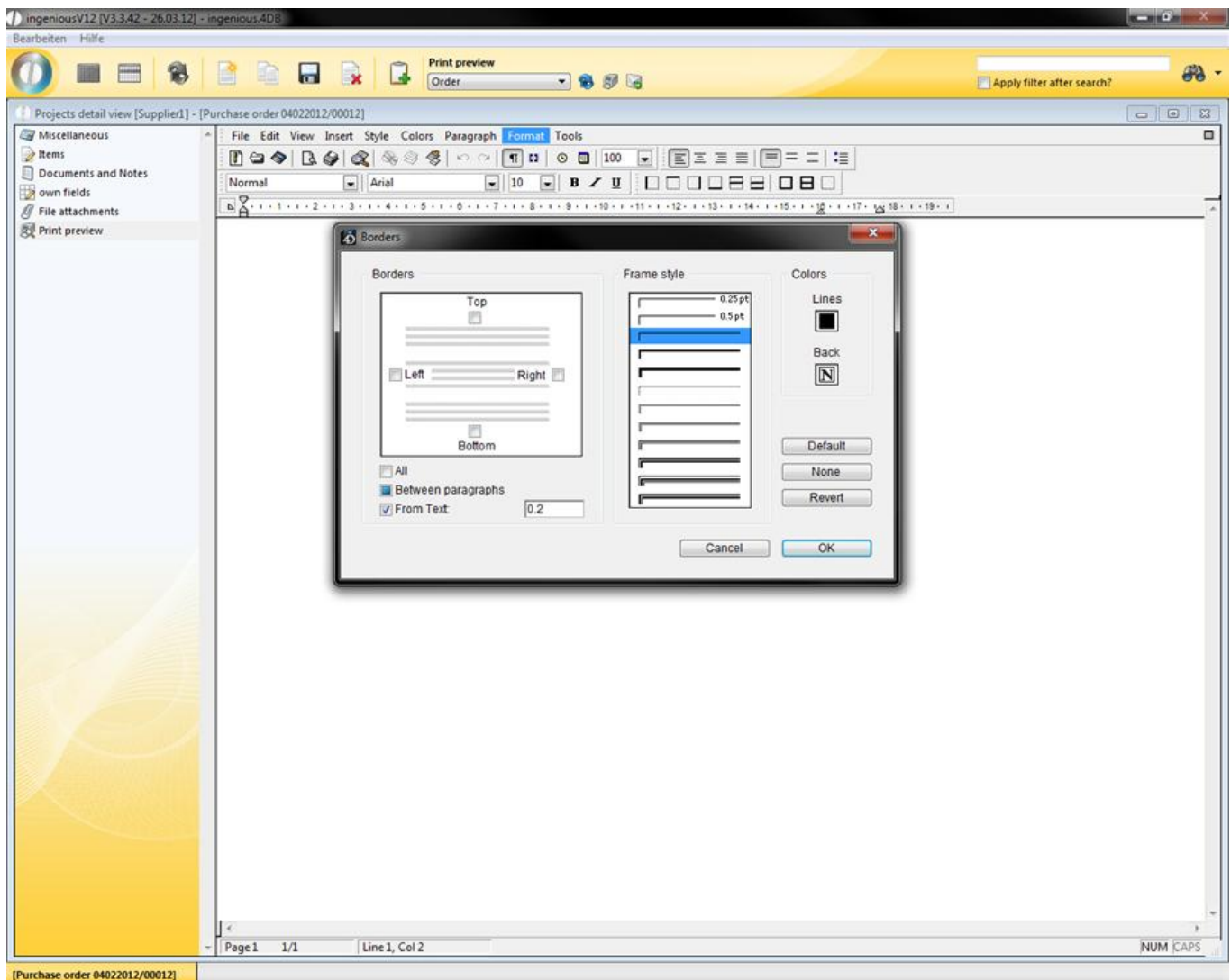
Window for formatting paragraphs

With a click on the "Tabs" menu item, a window opens in which you will find all the settings for tabs. In the "Position" area you can specify where the tab should be located. With the "Alignment" field, you can set the formatting of the document in the area of this tab. In the "Executive" area you can determine with which sign the line should be filled up to the first tab when you update the tab key.



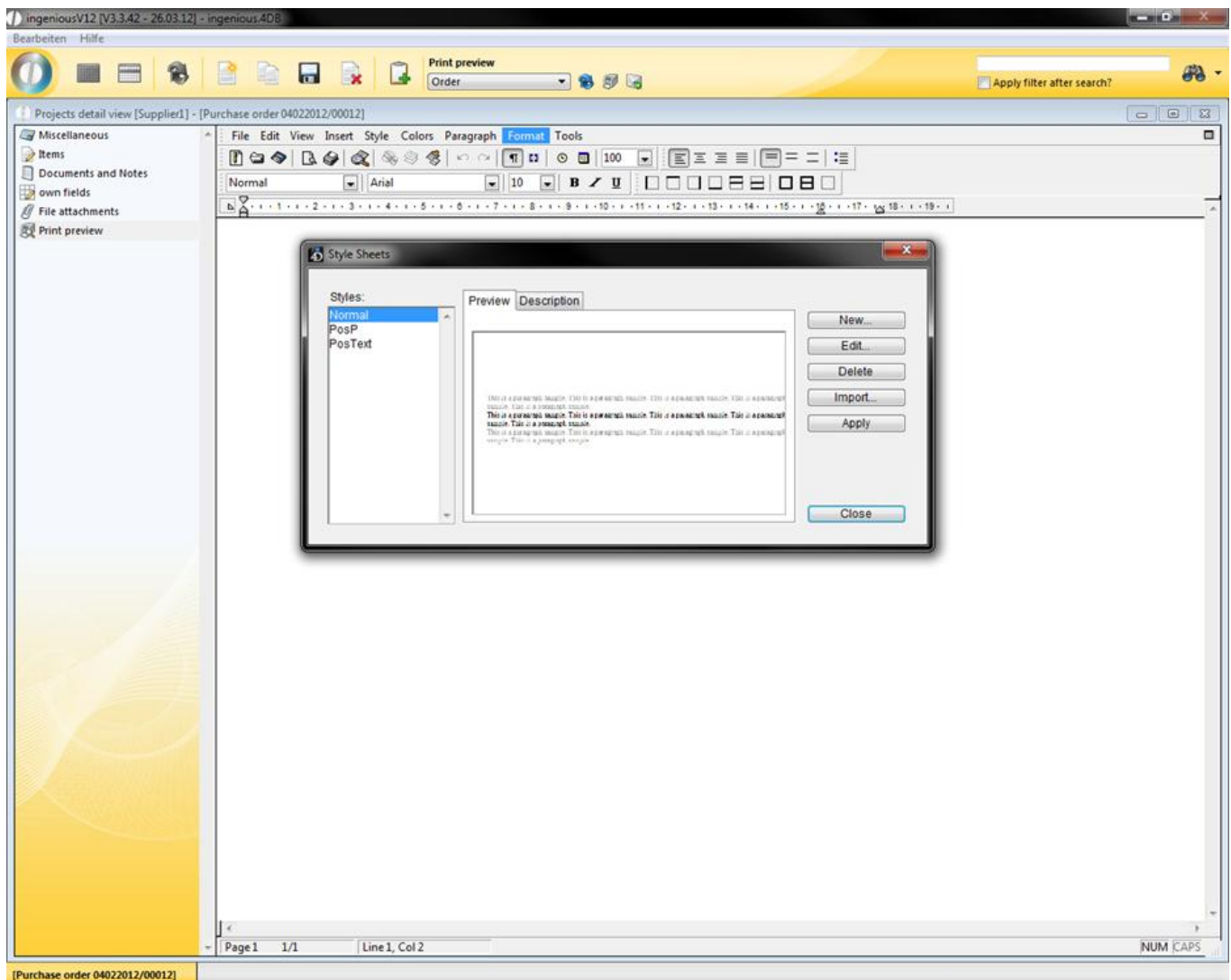
Window for tab properties

In the "Border" menu, you can select the border style, border color and the background color of a framed area. In addition, you can individually determine where the border should be (only above and below, only left, right and above, between the individual lines ...).



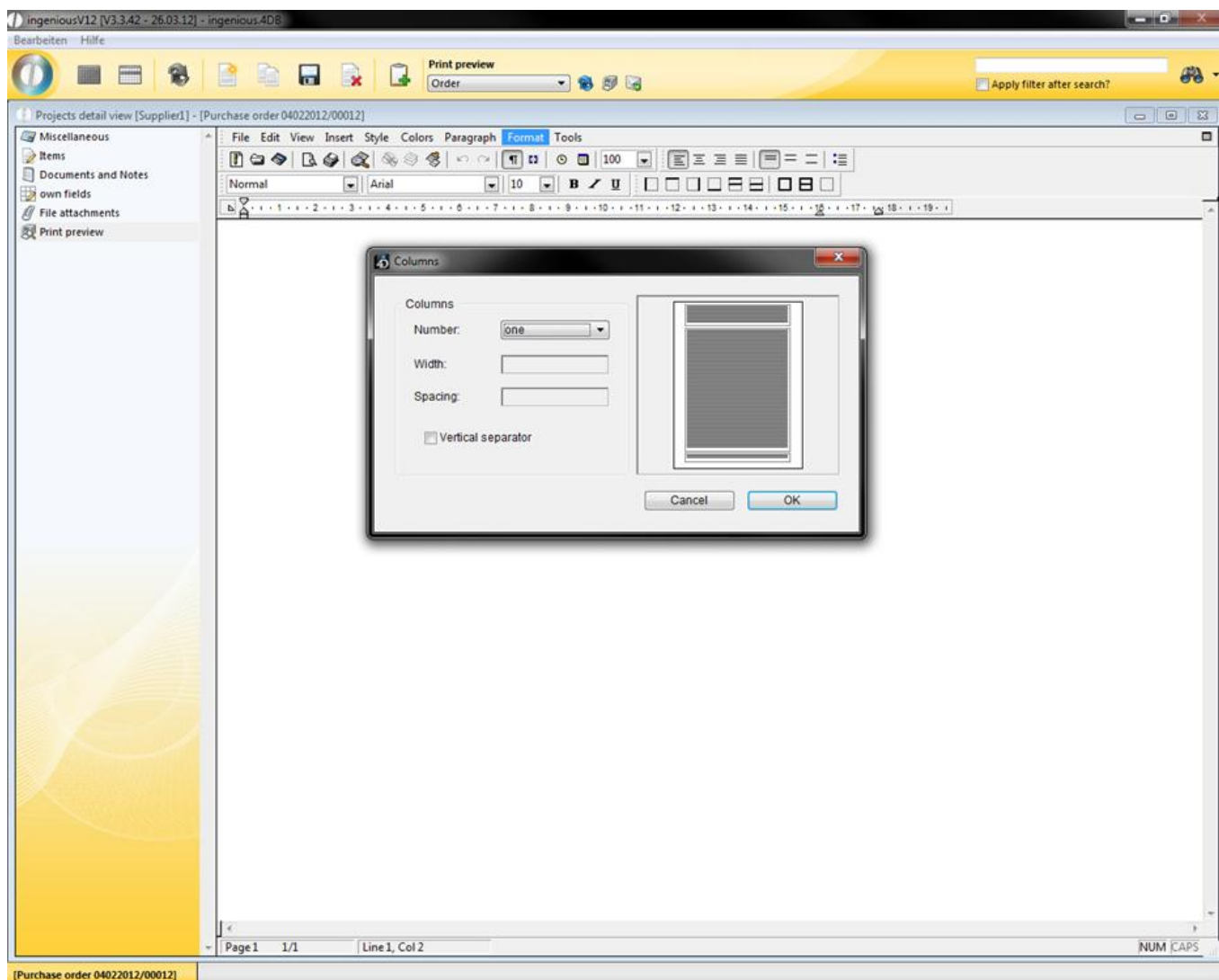
Window for creating a border

The entry, "Style templates" in word processing by Ingenious.V12 also offers you the possibility to save formats and make them usable for other texts. In addition, you can also create or import new formats.



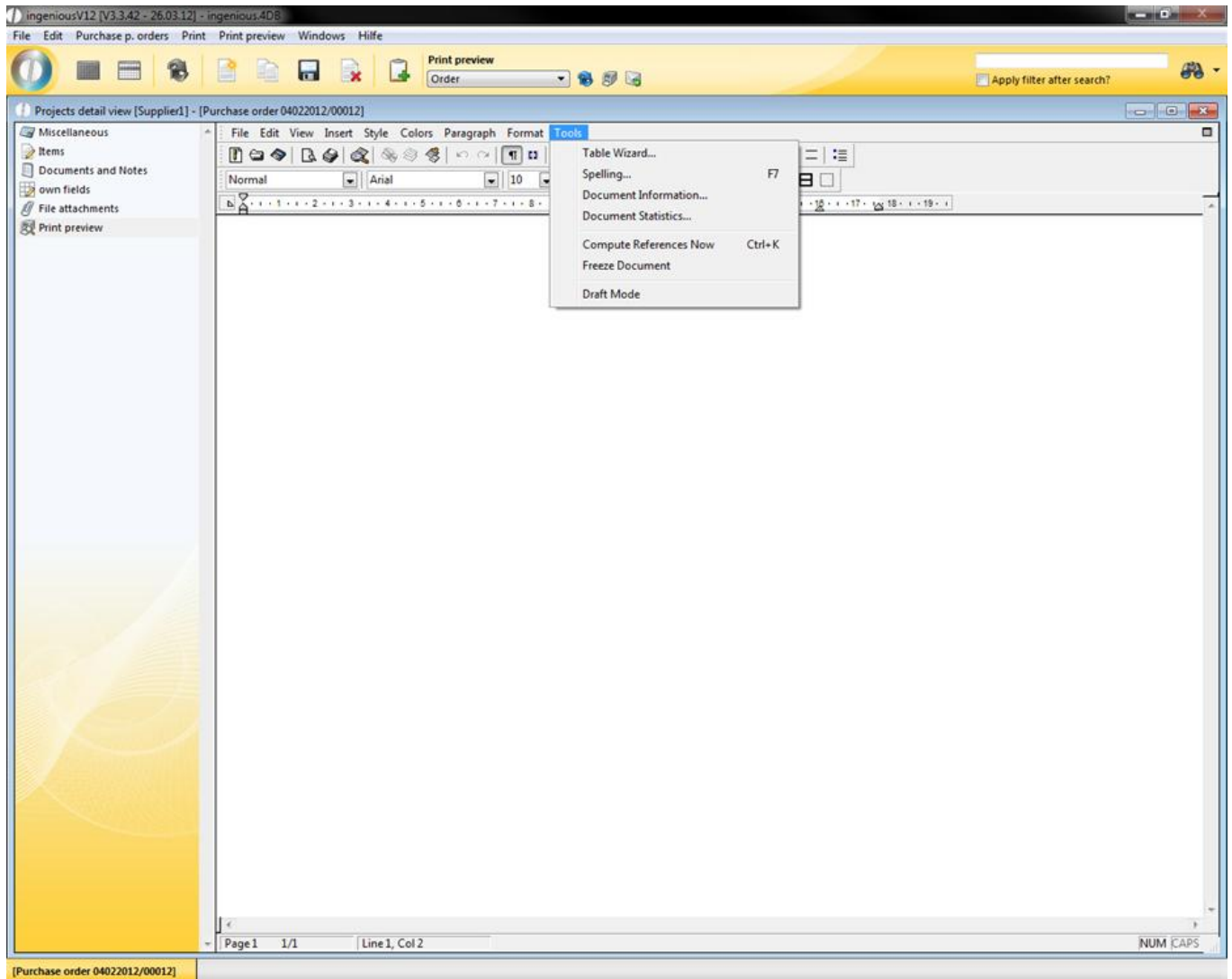
Window for creating style templates

In order to divide a document into several columns (max 10), you will find all the settings in the "Columns..." menu item



Window for entering columns in a document















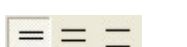



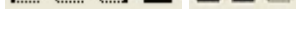
"Tools" menu item



In order to create a table, the "Table Assistant" entry is helpful. When you click on this menu item, a window opens to create a table. Here you can specify the number of the columns, lines as well as the color configuration. With the menu item "Spelling" you can check the text for spelling errors. In the menu item "Languages" you can select a language. The spell check will be operated relevant to the language. You can assign additional information such as author, company and date created to your document with the menu "Document information". The entry "Document statistics" provides information about the number of columns, pictures, hyperlinks, words or lines that are in the document. The menu item "Calculate references now" prompts the text editor to check the references for all items. This is necessary only because the "Page number" reference is automatically updated. If an item from the database to which you refer with the link ("4D Printing") changes in the document, you must click on "Calculate references" to prompt the update of the document. With the menu item "Modify references", you can modify references to normal text. Thus the current value of the reference will be forever stored in the document. Caution! A once modified reference cannot be reversed. In that case, you must insert a new reference. With the menu item "Layout mode" you can possibly accelerate the word processing. Standard mode is "WYSIWYG". That means that the definitions for print fonts are read by the printer drive of the selected printer. The text input could be possibly slower then. That depends on the operating system (especially windows 98) printer drives and the help programs existing on the computer. In this case you may deactivate the "WYSIWYG" mode. For this you select the layout mode. You should deactivate this mode when creating a new page configuration for the screen. Printing is always done in "WYSIWYG" mode.

The tool bars

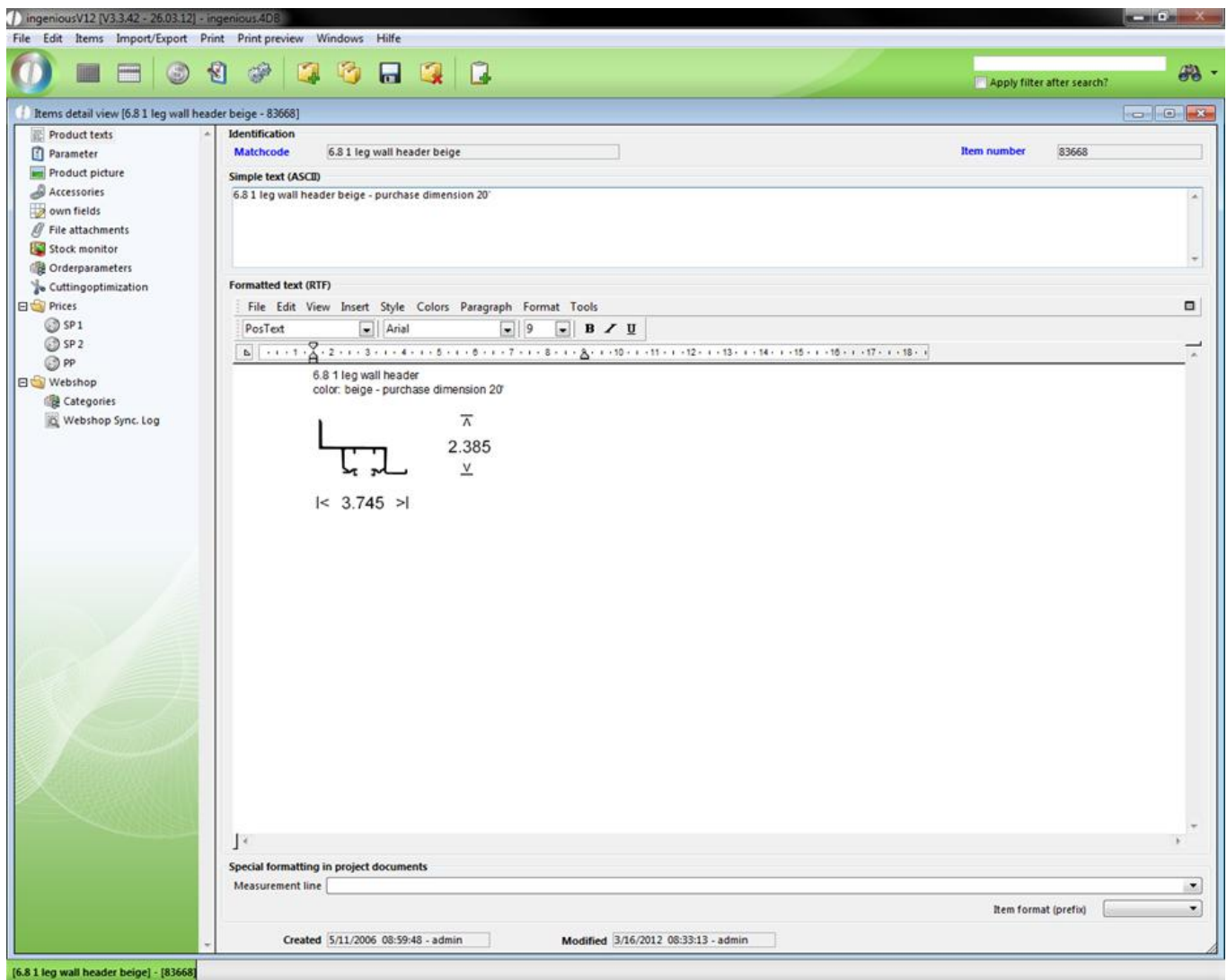
The tool bars provide quicker, easier access to the functions of the menu bar. Because some icons clearly differ from the Microsoft standard, a short description of the utilized icons for word processing by Ingenious.V12 follows. You can obtain similar illustration texts when you hold the cursor a short time above a symbol.

	Create a new document
	Open a document
	Save
	Page view
	Printing
	Search
	Cut
	Copy
	Paste
	Back or forward
	Display or hide non-visible signs
	Display or hide references
	Enter current time
	Enter current date
	Justification
	Line spacing
	Bullets
	Text formatting (bold, cursive, underline)
	Borders

Word processing in the item detail view

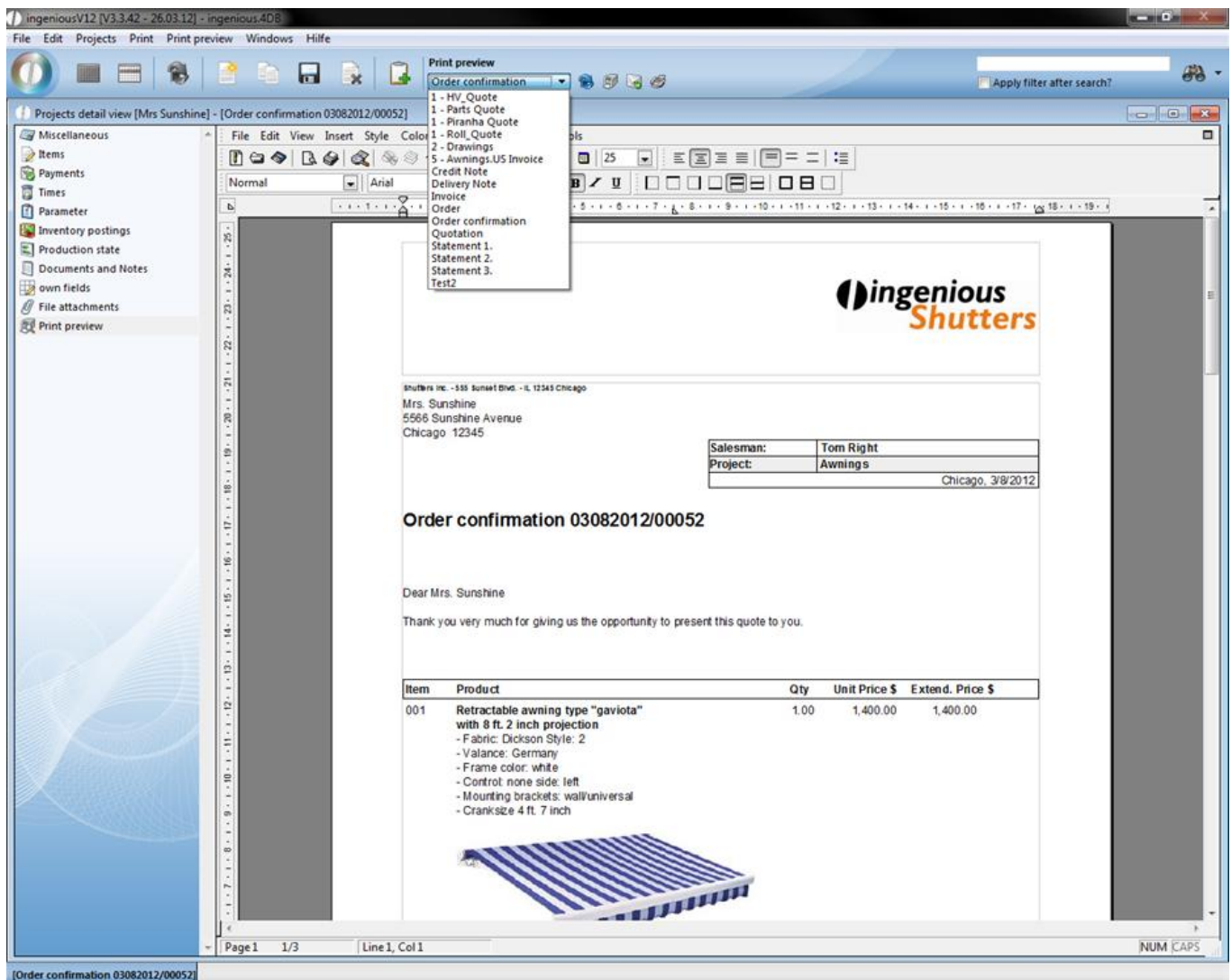
Word processing in the "Article" module has been developed especially as a supplement to "Simple text (ASCII)". Here you can only input unformatted texts. With "RTF" (Rich Text Format = "Comprehensive text formations") in contrast, you have full composition freedom in paragraph, color, graphics, font,...of modern word processing.


Thus you have the possibility to file complete descriptions of an article. The link to article illustrations also does not pose any problems. These illustrations can be later printed on the offers for these articles.



Word processing in the project detail view

Word processing in the "Workflow" modules also has a pop-up field with the name "Project template".



In this pop-up field you can retrieve diverse project templates that you saved in the text administration module. By default, the preset document template for the respective project status will be used. Simply select a preview and then confirm with the  button.

These views will be generated with the respective data and made available. Because pictures of the article only make sense in the quotes, the document template "Quote" is set as default in "RTF Text" as "PosText Source". In order to modify that in a single document, the "PosText Source" pop-up field will be in the detail view of each project in the "Parameter" column. Of course you can also use word processing as usual and create and print your own documents.

9.3 Quick report editor

Ingenious.V12 offers a variety of predefined print reports. Without much effort even individual reports can be assembled. With the quick report editor, desired data can be selected and exported to HTML for further processing, filing or printout. You reach the quick report editor in the "Items" module through the menu entries: "Import/Export - Free reports" or in the "Contacts" module via the menu item "Contact - free reports". The quick report editor offers many more possibilities to display modified or formatted data.

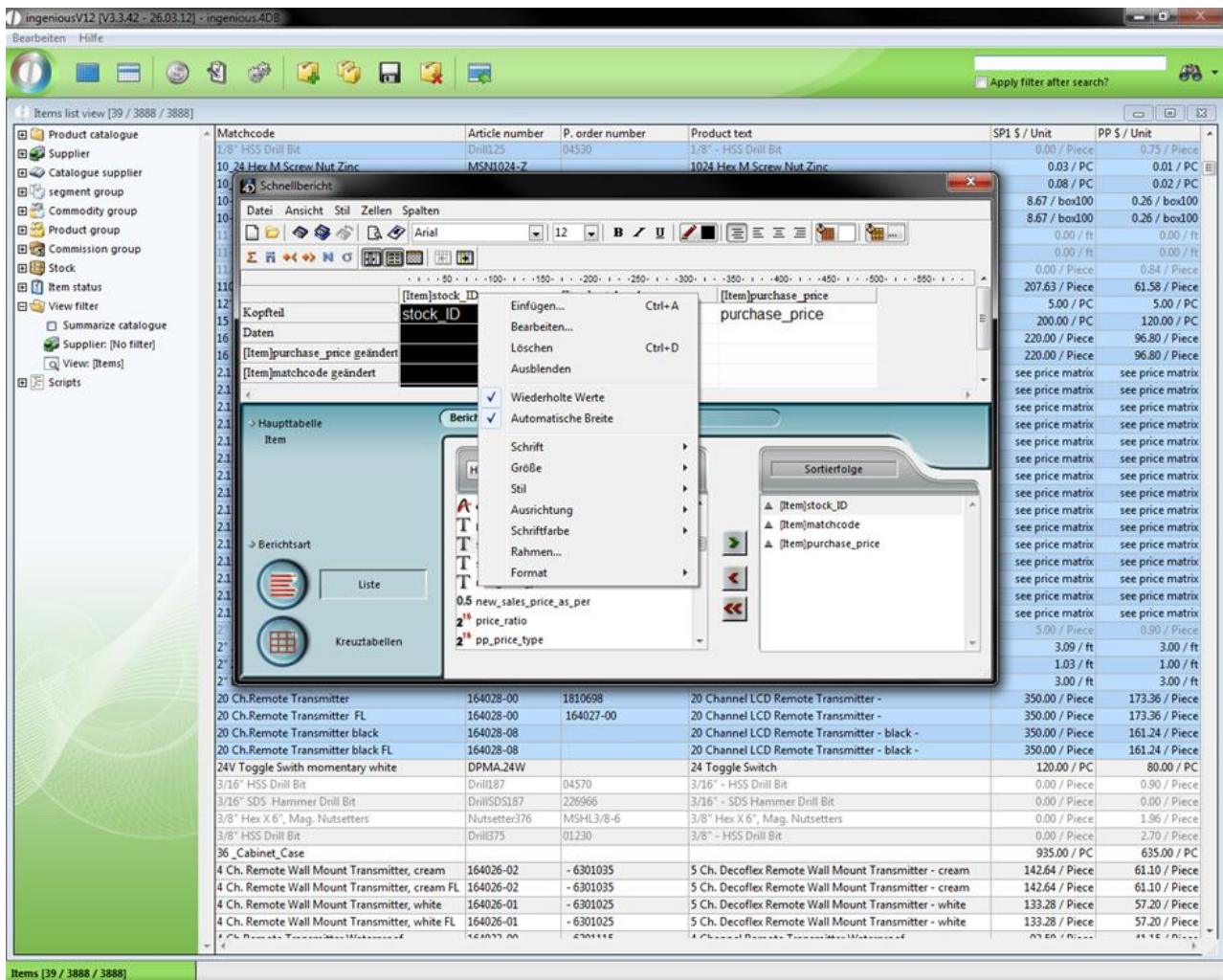
The screenshot shows the ingenious.V12 software interface. A context menu is open over the 'Free summary' option. The main window displays a table with the following columns: Article number, P. order number, Product text, SP1 \$ / Unit, and PP \$ / Unit. The table contains various items such as '11/64" - HSS Drill Bit', '1024 Hex M Screw Nut Zinc', '10-12 x 3/4" Phil Pan Sheet Metal Screw - Ext. bar Screws / U', 'BUILD-OUT ANGLE 2x5x190x20ft, color: white, purchase dir', '11/64" - HSS Drill Bit', 'Wind Remote with Sensor (Eolis)', '12" x 12" Slat & Guiderail Sample', '15 Channel LCD Display Remote', '16 Channel LCD Remote Transmitter -', '16 Channel LCD Remote Transmitter', 'Sales price matrix for following configuration:', '2" .050 BERTH Aluminum Storm Panel', '2" 24-Gauge BERTHA™ Steel Panel', '2" BERTHA™ Clear Panel', '20 Ch.Remote Transmitter', '20 Ch.Remote Transmitter FL', '20 Ch.Remote Transmitter black', '20 Ch.Remote Transmitter black FL', '24V Toggle Switch momentary white', '3/16" HSS Drill Bit', '3/16" SDS Hammer Drill Bit', '3/8" Hex X 6", Mag. Nutsetters', '3/8" HSS Drill Bit', '36_Cabinet_Case', '4 Ch. Remote Wall Mount Transmitter, cream', '4 Ch. Remote Wall Mount Transmitter, cream FL', '4 Ch. Remote Wall Mount Transmitter, white', and '4 Ch. Remote Wall Mount Transmitter, white FL'.

Article number	P. order number	Product text	SP1 \$ / Unit	PP \$ / Unit
Drill025	04530	11/64" - HSS Drill Bit	0.00 / Piece	0.75 / Piece
MSM1024-Z		1024 Hex M Screw Nut Zinc	0.03 / PC	0.01 / PC
PFM1024-1Z		10-24 PH Flat M Screw ZP	0.08 / PC	0.02 / PC
470717-00	tpp019A007SSS	10-12 x 3/4" Phil Pan Sheet Metal Screw - Ext. bar Screws / U	8.67 / box100	0.26 / box100
470717-00	tpp019A007SSS	10-12 x 3/4" Phil Pan Sheet Metal Screw - Ext. bar Screws / U	8.67 / box100	0.26 / box100
		BUILD-OUT ANGLE 2x5x190x20ft, color: white, purchase dir	0.00 / ft	0.00 / ft
		BUILD-OUT ANGLE 2-1/2x7x190x20ft, color: white, purchase	0.00 / ft	0.00 / ft
11/64" - HSS Drill Bit	04560	11/64" - HSS Drill Bit	0.00 / Piece	0.84 / Piece
110207113909000601200002Q	- 6301022	Wind Remote with Sensor (Eolis)	207.63 / Piece	61.58 / Piece
12" x 12" Slat & Guiderail Sample		12" x 12" Slat & Guiderail Sample	5.00 / PC	5.00 / PC
15 Channel LCD Display Remote	EL03-17	15 Channel LCD Display Remote (hand held)	200.00 / PC	120.00 / PC
16 Ch.Remote Transmitter	164029-00	16 Channel LCD Remote Transmitter -	220.00 / Piece	96.80 / Piece
16 Ch.Remote Transmitter FL	164029-00	16 Channel LCD Remote Transmitter	220.00 / Piece	96.80 / Piece
2.15_NEW_Pricematrix_CHD2_Batt		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD2_Strap		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD2_Switch		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_1/2 Grid_Gear		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_1/2 Grid_Switch		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Gear		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Grid_Gear		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Grid_Spring		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Grid_Switch		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Partial_Gear		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Partial_Spring		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Partial_Switch		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Spring		Sales price matrix for following configuration:	see price matrix	see price matrix
2.15_NEW_Pricematrix_CHD6_Switch		Sales price matrix for following configuration:	see price matrix	see price matrix
2" Inch spacers brass -	205447-00	2" Inch spacers brass -	5.00 / Piece	0.90 / Piece
2" .050 BERTH Aluminum Storm Panel	2" .050 BERTHA	2" .050 BERTH Aluminum Storm Panel	3.09 / ft	3.09 / ft
2" 24-Gauge BERTHA™ Steel Panel	2" 24-Gauge BERTI	2" 24-Gauge BERTHA™ Steel Panel	1.03 / ft	1.00 / ft
2" BERTHA™ Clear Panel	2" BERTHA™ Clear	2" BERTHA™ Clear Panel	3.00 / ft	3.00 / ft
20 Ch.Remote Transmitter	164028-00	20 Channel LCD Remote Transmitter -	350.00 / Piece	173.36 / Piece
20 Ch.Remote Transmitter FL	164028-00	20 Channel LCD Remote Transmitter -	350.00 / Piece	173.36 / Piece
20 Ch.Remote Transmitter black	164028-08	20 Channel LCD Remote Transmitter - black -	350.00 / Piece	161.24 / Piece
20 Ch.Remote Transmitter black FL	164028-08	20 Channel LCD Remote Transmitter - black -	350.00 / Piece	161.24 / Piece
24V Toggle Switch momentary white	DPMA-24W	24 Toggle Switch	120.00 / PC	80.00 / PC
3/16" HSS Drill Bit	Drill187	3/16" - HSS Drill Bit	0.00 / Piece	0.90 / Piece
3/16" SDS Hammer Drill Bit	DrillSDS187	3/16" - SDS Hammer Drill Bit	0.00 / Piece	0.00 / Piece
3/8" Hex X 6", Mag. Nutsetters	Nutsetter376	3/8" Hex X 6", Mag. Nutsetters	0.00 / Piece	1.96 / Piece
3/8" HSS Drill Bit	Drill1375	3/8" - HSS Drill Bit	0.00 / Piece	2.70 / Piece
36_Cabinet_Case			935.00 / PC	635.00 / PC
4 Ch. Remote Wall Mount Transmitter, cream	164026-02	5 Ch. Decoflex Remote Wall Mount Transmitter - cream	142.64 / Piece	61.10 / Piece
4 Ch. Remote Wall Mount Transmitter, cream FL	164026-02	5 Ch. Decoflex Remote Wall Mount Transmitter - cream	142.64 / Piece	61.10 / Piece
4 Ch. Remote Wall Mount Transmitter, white	164026-01	5 Ch. Decoflex Remote Wall Mount Transmitter - white	133.28 / Piece	57.20 / Piece
4 Ch. Remote Wall Mount Transmitter, white FL	164026-01	5 Ch. Decoflex Remote Wall Mount Transmitter - white	133.28 / Piece	57.20 / Piece

"The first impression counts!" This expression also applies to reports. That is why the quick report editor is equipped with numerous formatting possibilities.

The context menus

Normally, menus open when one clicks on a menu item. With context menus it is different because they open on the current position of the cursor when clicking on the right mouse key and when there is a context menu present. There are three different context menus in the quick report editor: One for the column, one for the line and one for the cell.



With the column context menu, you can enter columns, edit, delete or display them. With the “Edit...” context menu command you open the formula editor in which you have the possibility to enter your own formulas in the columns. Should you need a column only for sorting and do not want it published in a printout, you can hide it. The hidden column will be marked in a gray diamond grid. The entry “Repeated values” prevents the multiple display of a term in the same column.

The screenshot displays the ingenious.V12 software interface. The main window shows a list of items with columns for stock ID, matchcode, and unit. A search filter is applied: "0.5 pp_price_per". The list includes various items such as "10 24 Hex M Screw Nut Zinc", "10 24 Pin Flat Head Screw ZP", "15 Channel LCD Display Remote", and "20 Ch. Remote Transmitter". The bottom of the window shows a summary of items: 39 / 3888 / 3888.

stock ID	matchcode	unit
10	24 Hex M Screw Nut Zinc	PC
10	24 Pin Flat Head Screw ZP	PC
15	Channel LCD Display Remote	PC
2.15	NEW Priometric CHD2 Bat	soft
2.15	NEW Priometric CHD2 Strap	soft
2.15	NEW Priometric CHD2 Switch	soft
2.15	NEW Priometric CHD6 1/2 Grid Gear	soft
2.15	NEW Priometric CHD6 1/2 Grid Spring	soft
2.15	NEW Priometric CHD6 1/2 Grid Switch	soft
2.15	NEW Priometric CHD6 Gear	soft
2.15	NEW Priometric CHD6 Grid Gear	soft
2.15	NEW Priometric CHD6 Grid Spring	soft
2.15	NEW Priometric CHD6 Grid Switch	soft
2.15	NEW Priometric CHD6 Partial Gear	soft
2.15	NEW Priometric CHD6 Partial Spring	soft
2.15	NEW Priometric CHD6 Partial Switch	soft
2.15	NEW Priometric CHD6 Spring	soft
2.15	NEW Priometric CHD6 Switch	soft
2"	050 BERTH Aluminum Storm Panel	ft
2"	24 Gauge BERTH Steel Panel	ft
2"	BERTH Clear Panel	ft
DELAWARE	1/4" Hex X 6" Mag. Nutsetters	Piece
DELAWARE	1/4" HSS Drill Bit	Piece
DELAWARE	1/4" SDS Hammer Drill Bit	Piece
DELAWARE	1/8" HSS Drill Bit	Piece
DELAWARE	10-12 Pin Fan Sheet Metal Screw	box/100
DELAWARE	11/64" HSS Drill Bit	Piece
DELAWARE	12x 12" Star & Quikdrill Sample	PC
DELAWARE	16 Ch. Remote Transmitter	Piece
DELAWARE	2" Inch spacers brass -	Piece
DELAWARE	20 Ch. Remote Transmitter	Piece
DELAWARE	20 Ch. Remote Transmitter black	Piece

pp_unit	pp_price_per
0.5	0.5

Item	Unit	Price
20 Ch. Remote Transmitter	164028-00	1810698
20 Ch. Remote Transmitter FL	164028-00	164027-00
20 Ch. Remote Transmitter black	164028-08	
20 Ch. Remote Transmitter black FL	164028-08	
24V Toggle Switch momentary white	DPMA-24W	
3/16" HSS Drill Bit	Drill187	04570
3/16" SDS Hammer Drill Bit	DrillSDS187	226966
3/8" Hex X 6", Mag. Nutsetters	Nutsetter376	MSHL3/8-6
3/8" HSS Drill Bit	Drill1375	01230
36 Cabinet Case		
4 Ch. Remote Wall Mount Transmitter, cream	164026-02	- 6301035
4 Ch. Remote Wall Mount Transmitter, cream FL	164026-02	- 6301035
4 Ch. Remote Wall Mount Transmitter, white	164026-01	- 6301025
4 Ch. Remote Wall Mount Transmitter, white FL	164026-01	- 6301025

Repeated values out

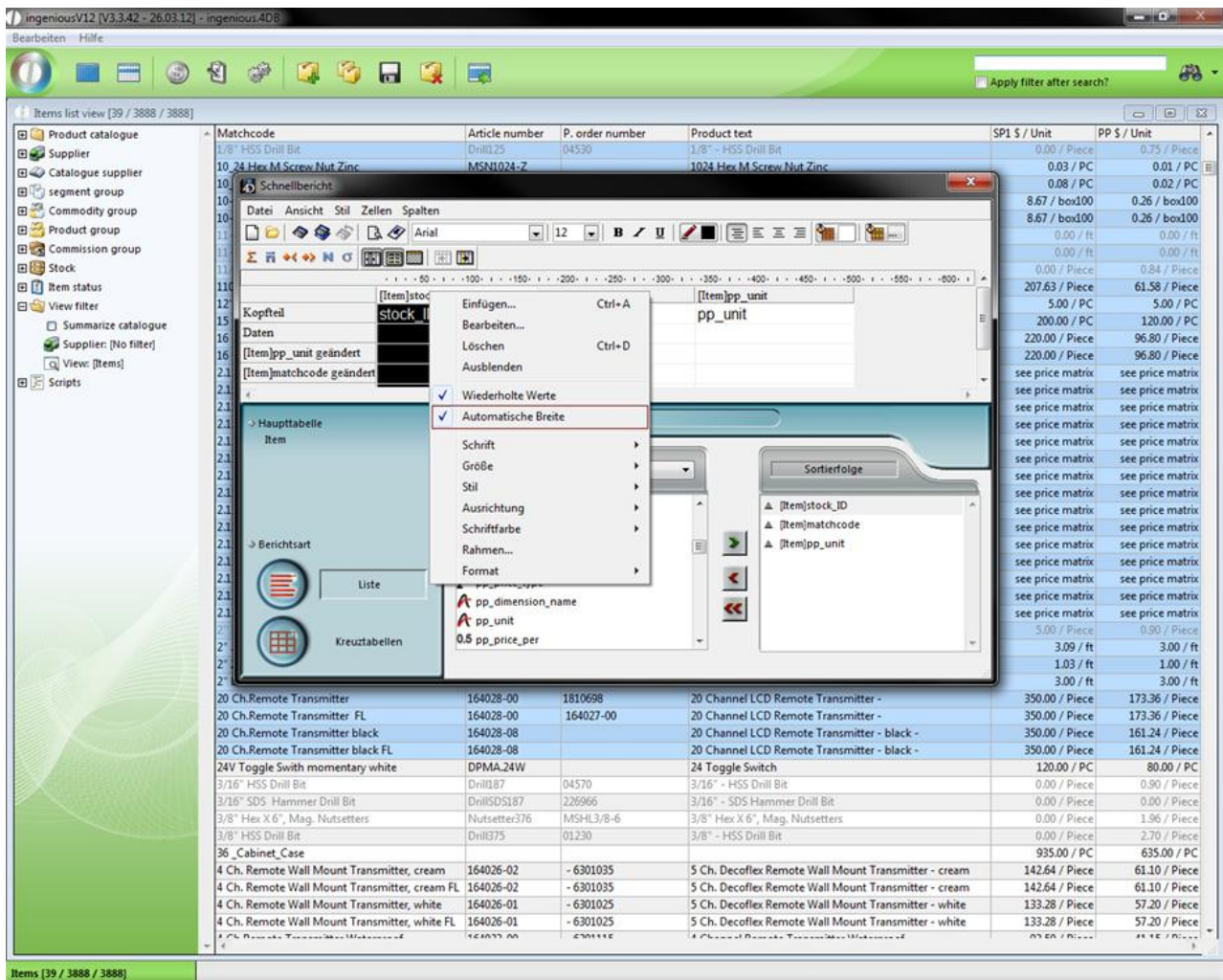
The screenshot displays the ingenious.V12 software interface. The main window shows a list of items with columns for stock ID, matchcode, and unit. A detailed view of a specific item is shown on the right, displaying various specifications and prices. The bottom section shows a list of items with columns for item name, stock ID, matchcode, and price.

stock ID	matchcode	unit
10	24 Hex M Screw Nut Zinc	PC
10	24 Pin Flat Head Screw ZP	PC
15	Channel LCD Display Remote	PC
2.15	NEW Priometric CHD2 Bat	soft
2.15	NEW Priometric CHD2 Strap	soft
2.15	NEW Priometric CHD2 Switch	soft
2.15	NEW Priometric CHD6 1/2 Grid Gear	soft
2.15	NEW Priometric CHD6 1/2 Grid Spring	soft
2.15	NEW Priometric CHD6 1/2 Grid Switch	soft
2.15	NEW Priometric CHD6 Gear	soft
2.15	NEW Priometric CHD6 Grid Gear	soft
2.15	NEW Priometric CHD6 Grid Spring	soft
2.15	NEW Priometric CHD6 Grid Switch	soft
2.15	NEW Priometric CHD6 Partial Gear	soft
2.15	NEW Priometric CHD6 Partial Spring	soft
2.15	NEW Priometric CHD6 Partial Switch	soft
2.15	NEW Priometric CHD6 Spring	soft
2.15	NEW Priometric CHD6 Switch	soft
2	050 BERTH Aluminum Storm Panel	ft
2	24 Gauge BERTH Steel Panel	ft
2	BERTH Clear Panel	ft
1/4"	Hex X 6" Mag. Nutsetters	Piece
1/4"	HSS Drill Bit	Piece
1/4"	SDS Hammer Drill Bit	Piece
1/8"	HSS Drill Bit	Piece
10-12	Pin Fan Sheet Metal Screw	box/100
1/8"	HSS Drill Bit	Piece
12x 12"	Star & Quikrail Sample	PC
16	Ch Remote Transmitter	Piece
2"	Inch spacers brass -	Piece
20	Ch Remote Transmitter	Piece
20	Ch Remote Transmitter black	Piece

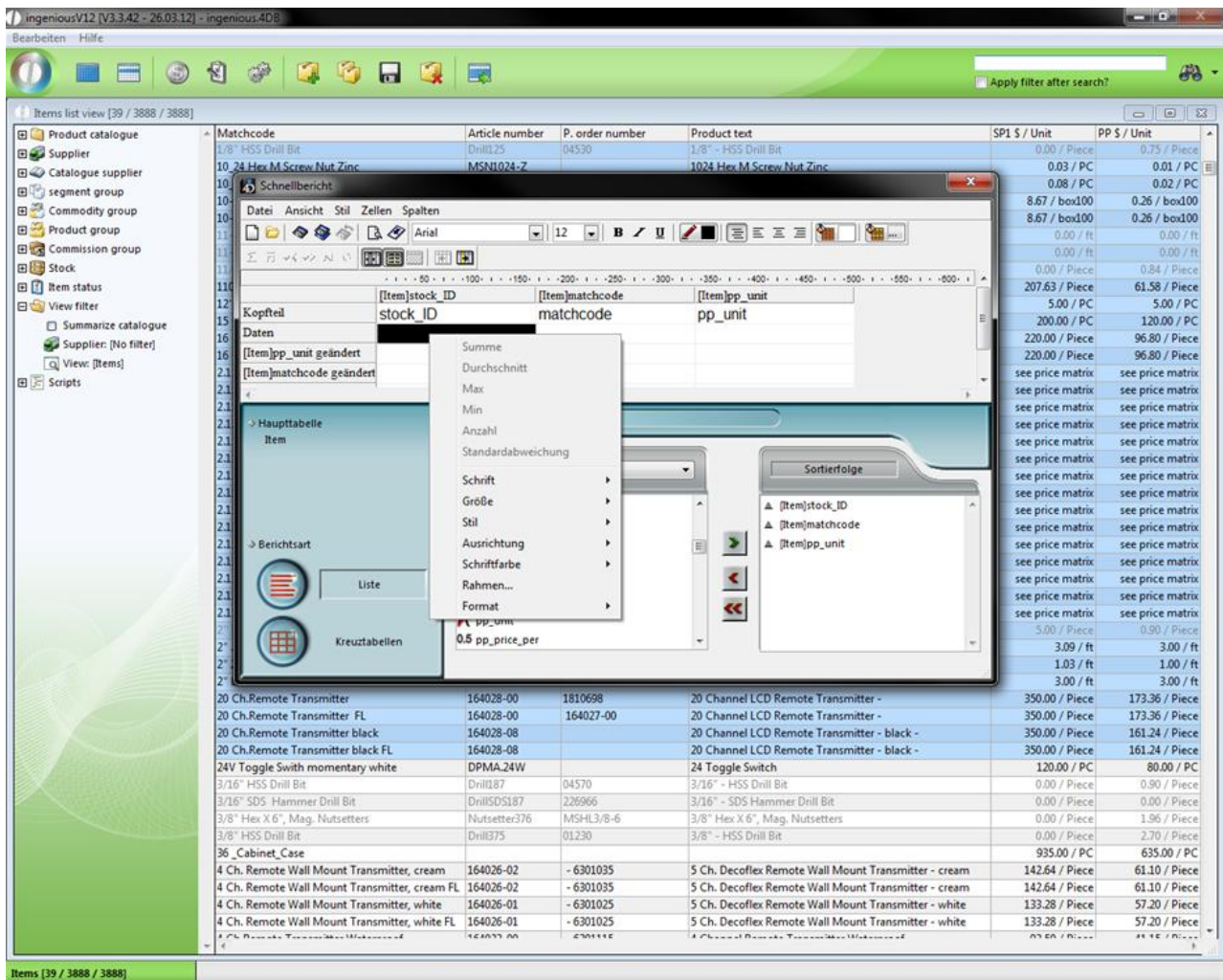
Item	Stock ID	Matchcode	Price
20 Ch Remote Transmitter	164028-00	1810698	350.00 / Piece
20 Ch Remote Transmitter FL	164028-00	164027-00	350.00 / Piece
20 Ch Remote Transmitter black	164028-08		350.00 / Piece
20 Ch Remote Transmitter black FL	164028-08		350.00 / Piece
24V Toggle Switch momentary white	DPMA-24W		120.00 / PC
3/16" HSS Drill Bit	Drill187	04570	0.00 / Piece
3/16" SDS Hammer Drill Bit	DrillSDS187	226966	0.00 / Piece
3/8" Hex X 6", Mag. Nutsetters	Nutsetter376	MSHL3/8-6	0.00 / Piece
3/8" HSS Drill Bit	Drill1375	01230	0.00 / Piece
36 Cabinet Case			935.00 / PC
4 Ch Remote Wall Mount Transmitter, cream	164026-02	- 6301035	142.64 / Piece
4 Ch Remote Wall Mount Transmitter, cream FL	164026-02	- 6301035	142.64 / Piece
4 Ch Remote Wall Mount Transmitter, white	164026-01	- 6301025	133.28 / Piece
4 Ch Remote Wall Mount Transmitter, white FL	164026-01	- 6301025	133.28 / Piece

Repeated values in

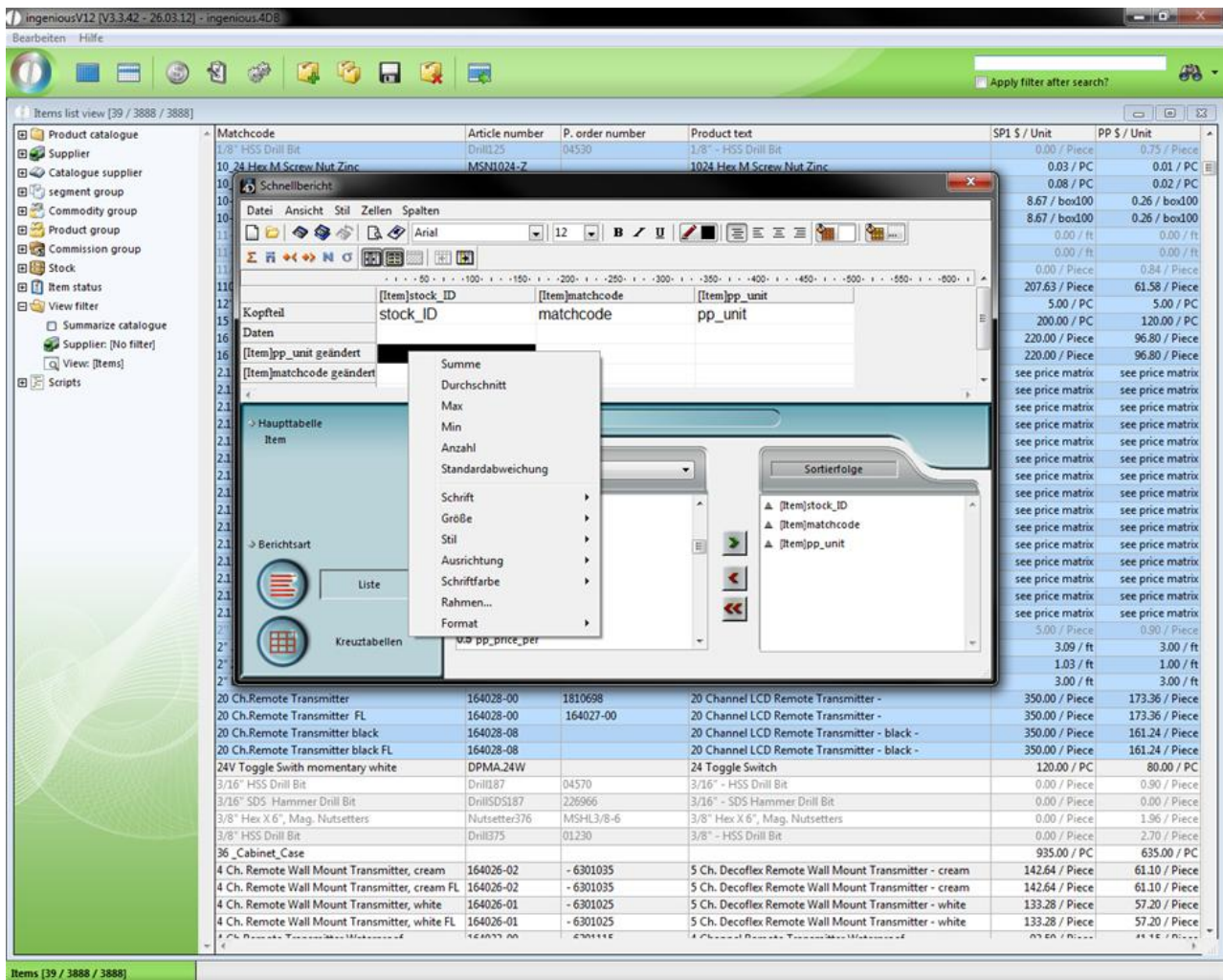
In order to not have to determine the width of a column yourself, there is an "Automatic width" command. With that, the width of the column will be adjusted to the "widest" entry of the column. The remaining entries of the column context menu concern the lay-out of the column and should be familiar to you.



The line context menu has almost the same graphical possibilities; just as the column menu and the module context menu "Font", "Size", "Style", "Justification", "Font color", "Borders" and "Format". Lines also can be hidden with the "Hide" command. In order to edit formulas with the formula editor, you must click here on the "Add..." context entry.

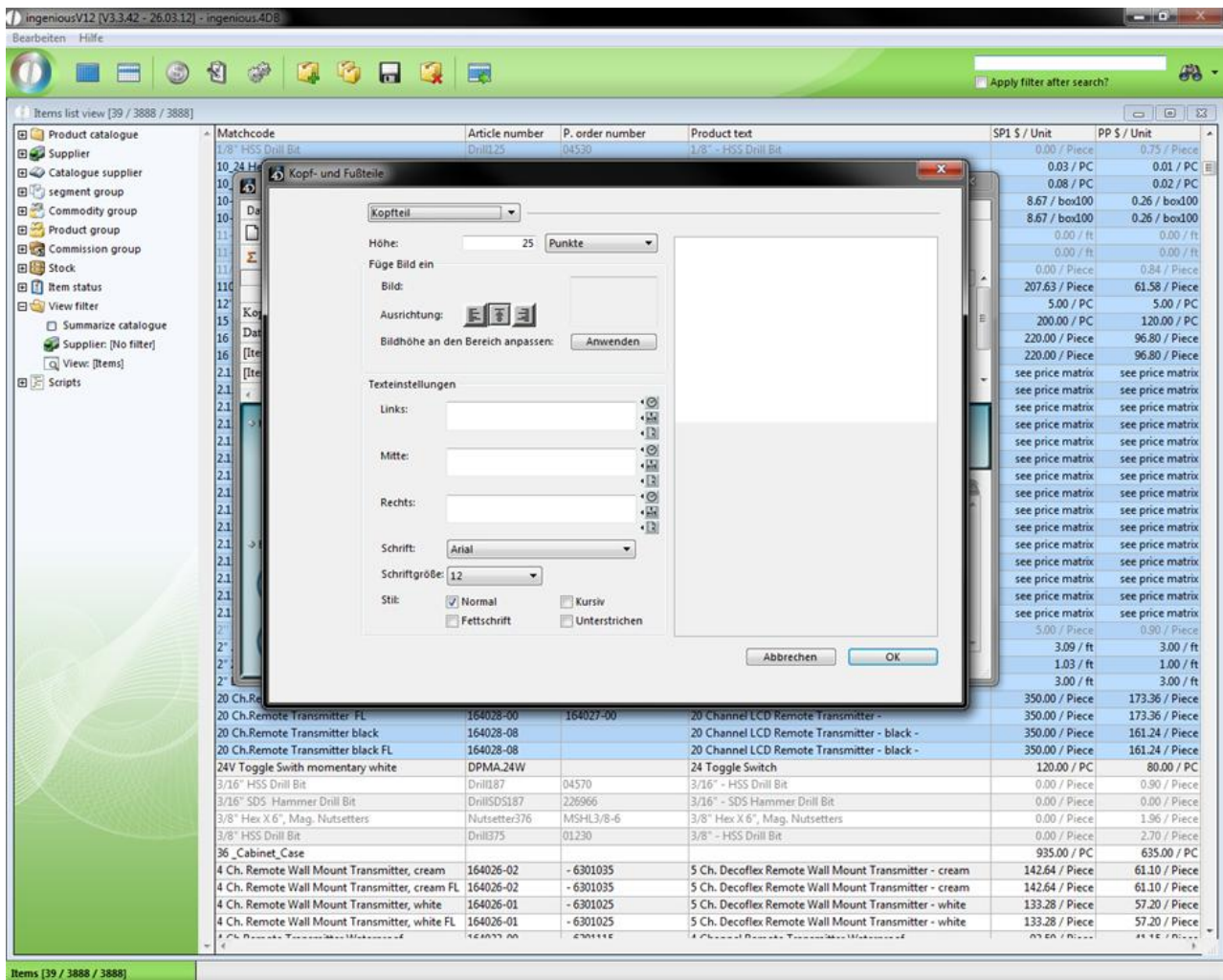


Next to the layout-effected entries, the cell context menu only offers the standard calculations: "Sum", "Average", "Max", "Min" and "Number" as new options. By clicking on one of these entries, the cell determines the respective value of the vertical and horizontal cells, and then returns it.



The Header and Footer

You can edit the header and footer of the quick report with the menu entry "File / Header and Footer". Here you can insert and adjust image files. In addition, you have the possibility to show the current time, date and the page number. The font and font style are also individually adjustable.





Window for creating a header and footer text

Borders and colors

By decorating the report with colors or borders, one can guide the viewer's focus. Therefore, the quick report editor also offers numerous variations here. In order to set a frame, you must mark the respective cells and select the menu entry "Style / Borders ..." afterwards. Here you can place the border with different thicknesses and colors in different positions.

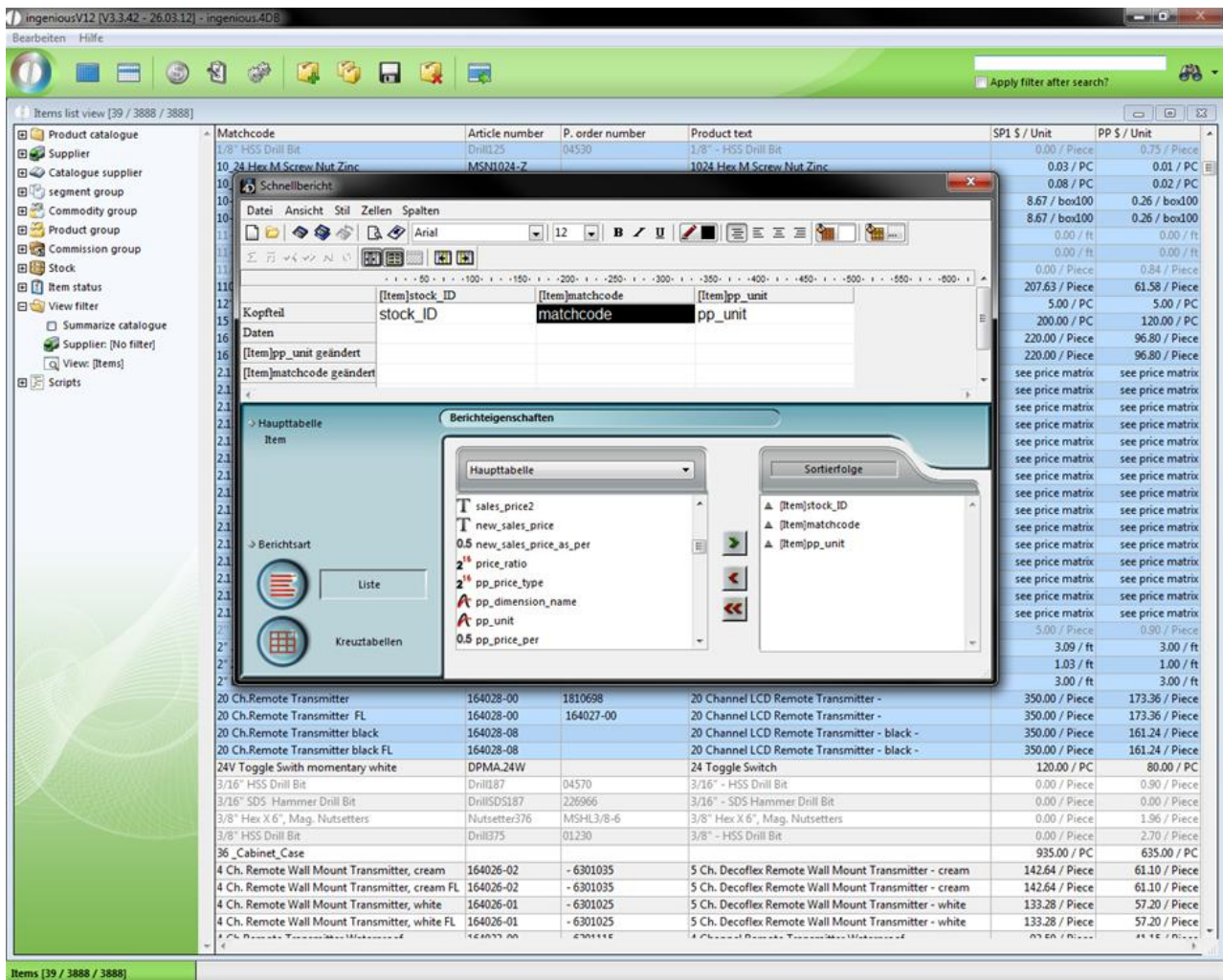


The screenshot displays the ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.408 application window. The main window shows a table with columns: Matchcode, Article number, P. order number, Product text, SP1 \$ / Unit, and PP \$ / Unit. A context menu is open over a cell, showing various formatting and calculation options. The 'Schriftfarbe' (Font color) option is highlighted, and a color selection palette is visible. The background table lists various items like '1/8" HSS Drill Bit', '24 Hex M Screw Nut Zinc', and 'Ch.Remote Transmitter'.

You can determine the colors of single cells or their contents with the context entry "Font color" for the respective cell or with the  and  buttons.

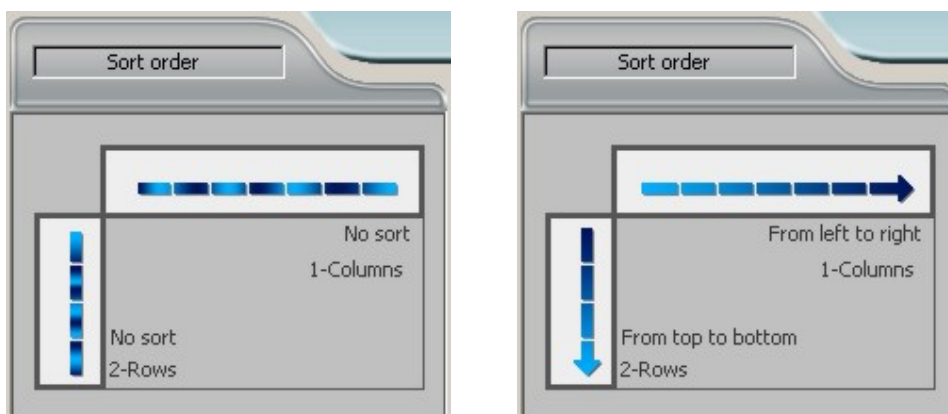
The sorting sequence

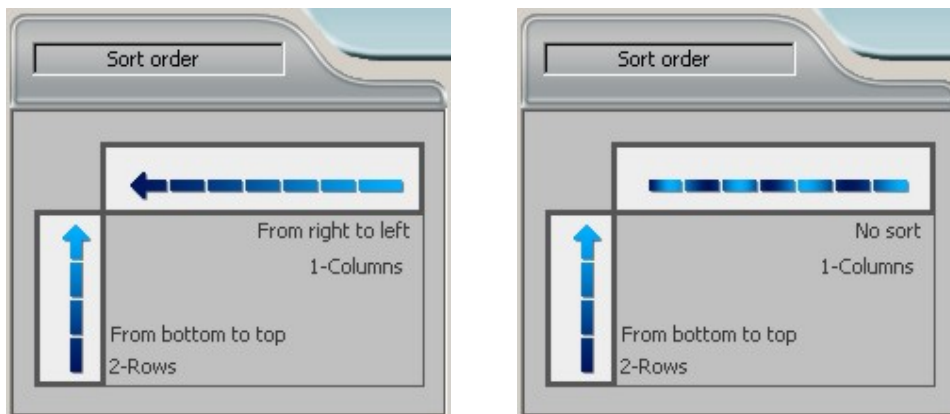
You can change the sorting sequence in the area with the same name of the report characteristics.



With a list as a quick report, the sorting occurs by means of the small triangle next to the data source. If the triangle points upwards (▲), it is sorted in ascending order (1,2,3, ... or a, b, c, ...). If the triangle points downward (▼), it is sorted in descending order.

With a cross tab, the sorting occurs with blue arrows that run vertically and horizontally.





Some possibilities for sorting a cross tab

If you click on them, change your direction and therefore also the sorting sequence of the respective data source.

8.3.1. Standard calculations

Standard calculations are used in cells of the quick report editor to determine numerical values. Standard calculations include "Sum", "Average", "Max", "Min" and "Count".

Sum

Adds the fixed (numerical) values with the cell and provides this sum in the same cell.

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09 \$
Axle, Aluminum 60mm	2.72 \$
Axle, Aluminum 70mm	5.72 \$
Sum:	9.53 \$

Min

Searches the lowest value of the fixed records with the cell (must be numeric) and returns it.

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09 \$
Axle, Aluminum 60mm	2.72 \$
Axle, Aluminum 70mm	5.72 \$
Min:	1.09 \$

Max

Gives the highest value of the fixed records with the cell (must be numeric) and returns it.

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09 \$
Axle, Aluminum 60mm	2.72 \$
Axle, Aluminum 70mm	5.72 \$
Max:	5.72 \$

Average

Determines and provides the average of the fixed records with the cell (must be numerical).

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09 \$
Axle, Aluminum 60mm	2.72 \$
Axle, Aluminum 70mm	5.72 \$
Average:	3.17 \$

Count

Identifies the number of fixed records with the cell and provides them as a number. In contrast to the other standard calculations, the records in "Count" can be alphanumeric.

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09 \$
Axle, Aluminum 60mm	2.72 \$
Axle, Aluminum 70mm	5.72 \$
Count:	3

Standard deviation

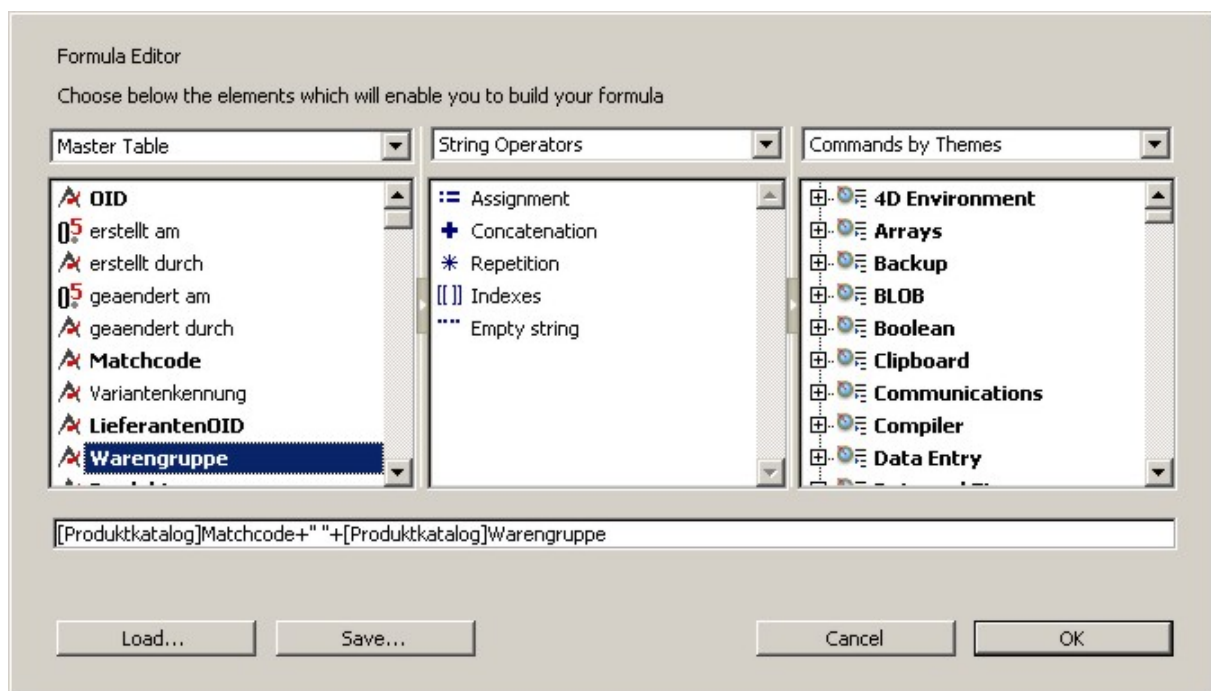
This function helps you to calculate the average mean variation.

Matchcode	SP flat price
Axle, Aluminum 40mm	1.09
Axle, Aluminum 60mm	2.72
Axle, Aluminum 70mm	5.72
Standard deviation:	2.34853855266064

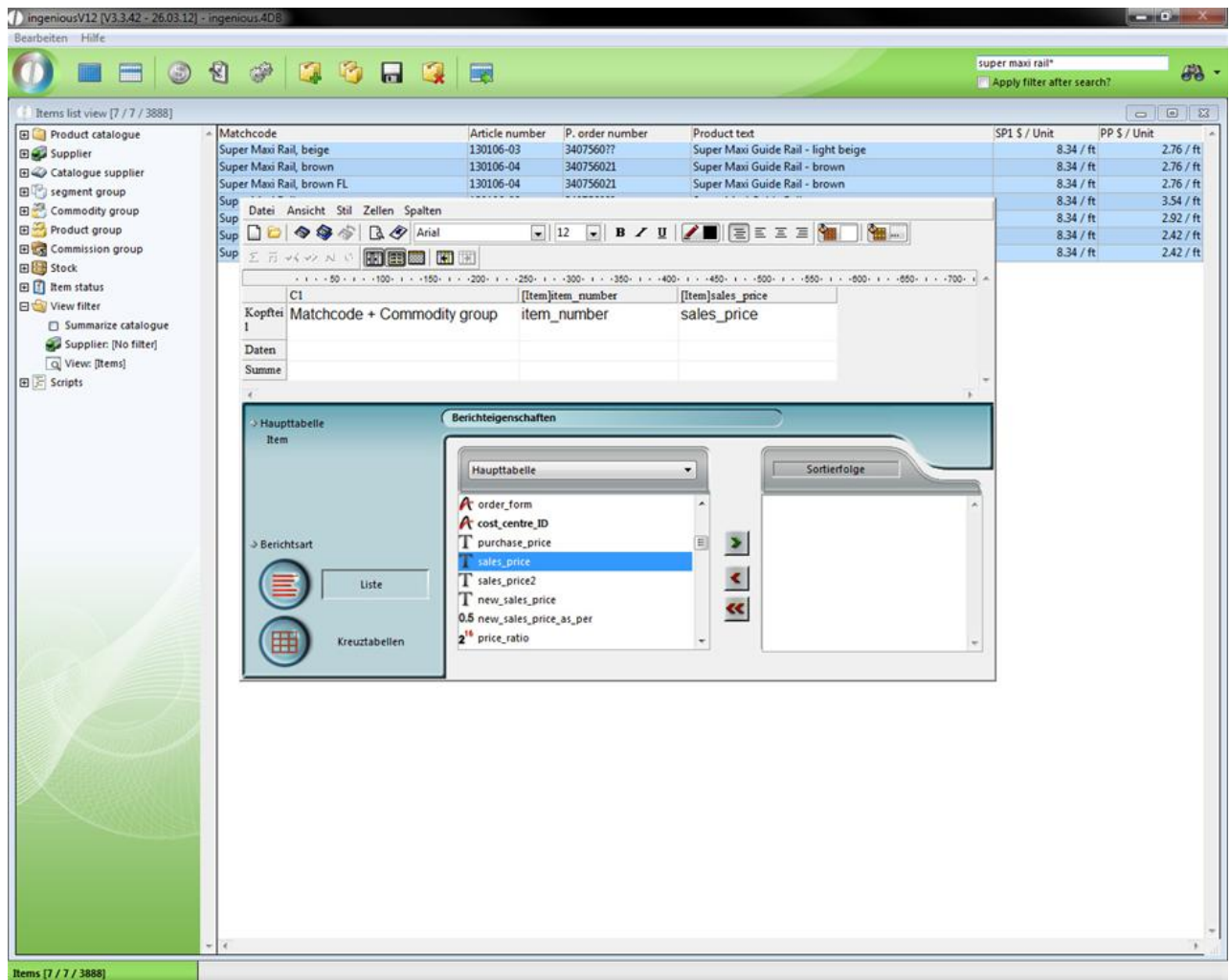
You can create completely individual columns with the formula editor. It is therefore possible to combine more data sources into one column. A simple exercise also follows in relation to this. In addition, you have the possibility to include even complex invoices and/or formulas in a table calculation.

Practice with the formula editor

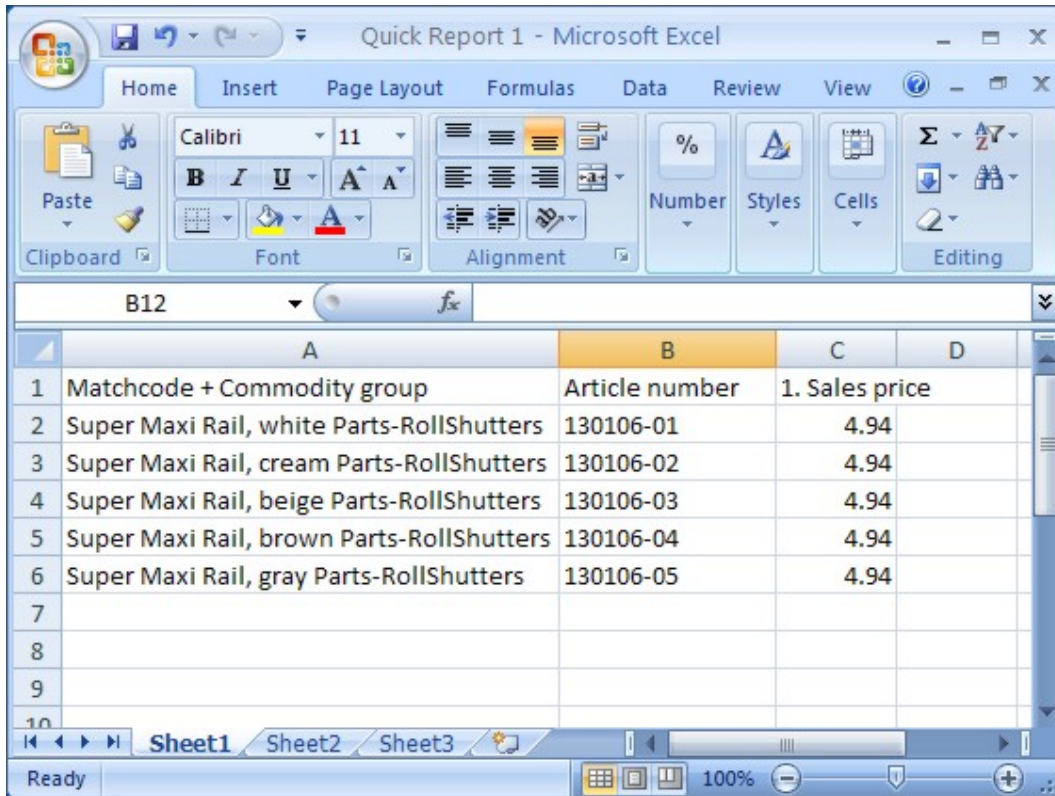
1. In the article catalogue, mark all articles that begin with "Super Maxi Rail" and open the quick report editor.
2. Enter the formula editor (as shown below) with the help of the top button "Add..." and the data source selection field and confirm with "OK".



3. In the column head of the column, enter "Matchcode + Commodity group" and select the other columns as shown in the picture.



4. If you now create the text document as usual and generate it in an excel spreadsheet, you will reach the following result.



	A	B	C
1	Matchcode + Commodity group	Article number	1. Sales price
2	Super Maxi Rail, white Parts-RollShutters	130106-01	4.94
3	Super Maxi Rail, cream Parts-RollShutters	130106-02	4.94
4	Super Maxi Rail, beige Parts-RollShutters	130106-03	4.94
5	Super Maxi Rail, brown Parts-RollShutters	130106-04	4.94
6	Super Maxi Rail, gray Parts-RollShutters	130106-05	4.94
7			
8			
9			
10			

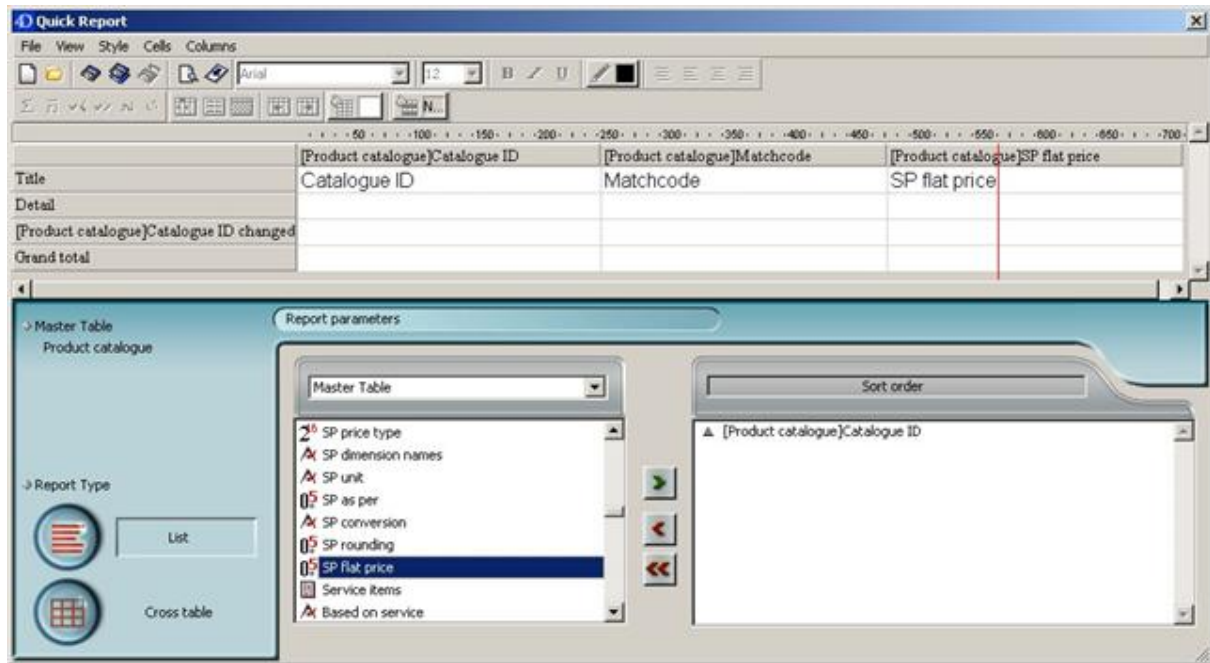
8.3.2. Report types

In this mode, the records are arranged according to different data sources and/or sorted and listed together. The cross tab shows your report as a two-dimensional table. The difference with the list table lies in the fact that your records result from exactly two data sources.



Practice creating a list

1. In the "Article" module, highlight at least six well-chosen articles and open the quick report editor.
2. Enter the data source "Catalogue ID", "Matchcode" and "SP flat price" successively using Drag & Drop in the report section of the editor. Now the list should be sorted according to the data source "Catalogue ID".
3. In addition, highlight "Catalogue ID" and pull it either by Drag & Drop or with the help of the button in the "Sort order" area.



4. Click in the column "[Product catalogue] Matchcode" on the cell of the "Sum" line and select the pop-up menu entry (right mouse key) "Number" here. Repeat the process in the "[Product catalogue] Catalogue ID changed" line in the same column.
5. Explain step 4 again in the column "[Product catalog] SP flat price" in the line "[Product catalogue] Catalogue ID changed" with the pop-up menu entry "Sum" and in the line "Sum" once more with the context entry "Average". This right justifies all cells except the header.

	[Product catalogue] Catalogue ID	[Product catalogue] Matchcode	[Product catalogue] SP flat price
Title	Catalogue ID	Matchcode	SP flat price
Detail			
[Product catalogue] Catalogue ID changed			
Grand total			

6. In the column "[Product catalog] SP flat price" change the format to #,###,##0.00 \$ in the "File" line with the context menu. Change the appearance of the cells with the tools and menu bar or the pop-up menu of the respective cells.

	[Product catalogue] Catalogue ID	[Product catalogue] Matchcode	[Product catalogue] SP flat price
Title	Catalogue ID	Matchcode	SP flat price
Detail			#,###,##0.00 \$
[Product catalogue] Catalogue ID changed			
Grand total			

7. With the right mouse click on the column head "[Product catalog] Catalogue ID" and deactivate the entry "Repeated values" from the context menu in order to delete the duplicate stock descriptions.
8. With the menu entry "File / Destination" select the option "Printer" to determine if the quick report should be printed out. Save the quick report with the menu item "File / Save as ..." in any path.
9. You receive a preview about your quick report with the button or the menu entry "File / Print Preview ..."

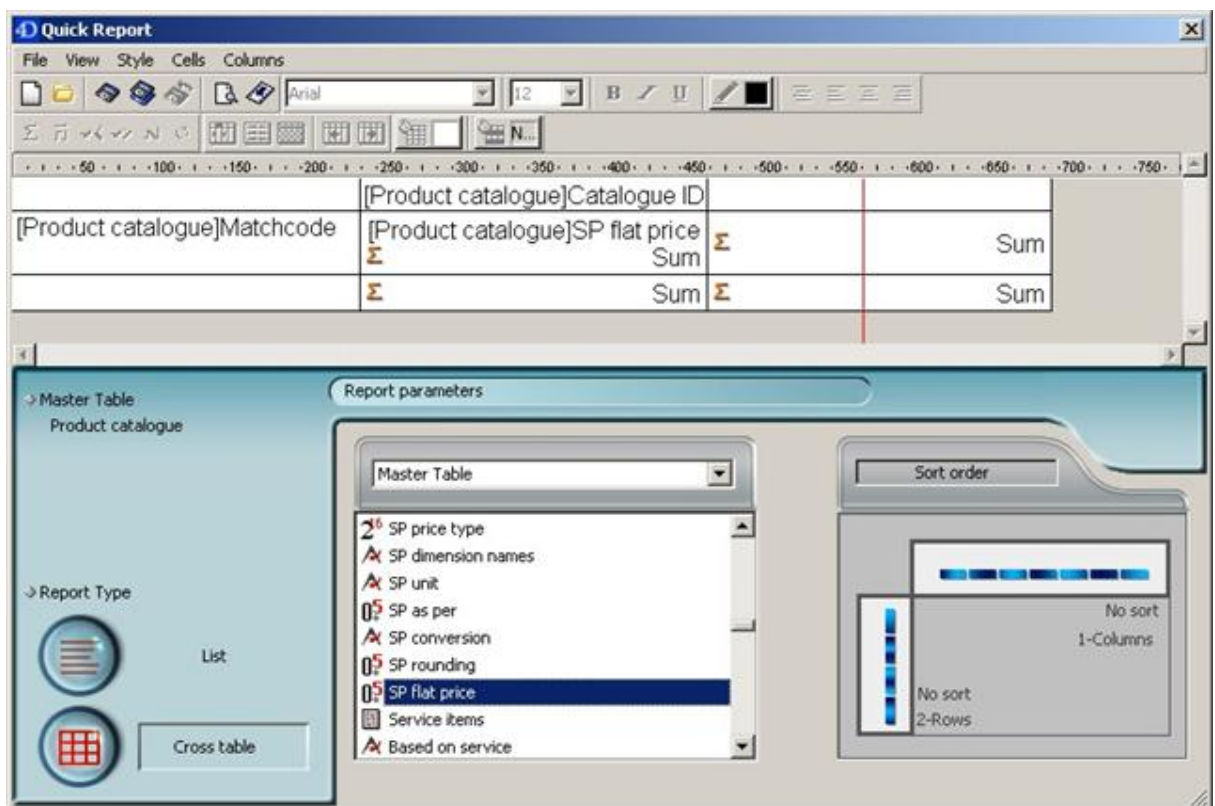
Catalogue ID	Matchcode	SP flat price
End Caps	End Cap 45° 5.5", black	9.68 \$
	1	9.68 \$
Guide Rails	Super Maxi Rail, cream	4.94 \$
	Super Maxi Rail, beige	4.94 \$
	2	9.88 \$
Motor	Motor 520 R2	442.67 \$
	1	442.67 \$
Stormbar	Stormbar Header, small, cream	4.06 \$
	Stormbar Header, large, cream	6.36 \$
	2	10.42 \$
	6	78.77 \$

Print preview of a sample report

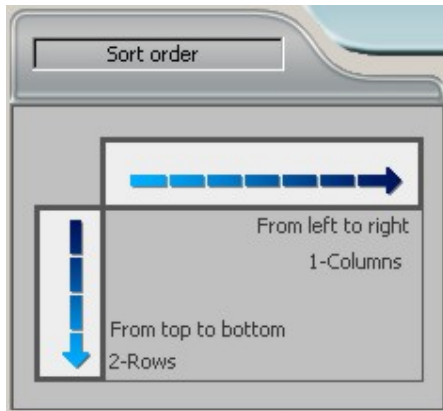
10. In order to generate the quick report (to print out in this case), just a click on the menu item "File / Generate ..." is necessary and the printout is generated in a few seconds.

Practice creating a cross tab

1. Mark at least six of any articles and open the quick report editor. Choose the report type "Cross tab".
2. Now pull the entry (data source) "Catalogue ID" in the middle cell of the first line, and the second data source "Matchcode" in the middle line of the first column.
3. Expand the cross tab further (as shown below) with the record "SP flat price" and the standard calculation "Sum" (4x). With the context menu choose the format ###,##0.00 for all four inside cells.



4. By clicking on the blue arrows, one can change the sort sequence of the data source in a cross tab.



5. Mark the three cells of the middle line successively and select any alternative background color with the color menu.

	[Product catalogue]Catalogue ID		
[Product catalogue]Matchcode	[Product catalogue]SP flat price	Σ	Sum
	Σ	Sum	Σ
	Σ	Sum	Σ

6. Choose the printer as the print target and save the quick report as usual (see practice with the list table) to look at the preview with the button afterwards.

	End Caps	Guide Rails	Motor	
End Cap 90" 10", white	61.83			61.83
End Cap 90" 5.5", black	8.15			8.15
Maxi Rail, brown		4.52		4.52
Motor 540 R2			473.88	473.88
Motor 6100 R2			646.20	646.20
Super Maxi Rail, brown		4.94		4.94
	69.98	9.46	1,120.08	1,199.52

Print preview of a sample quick report

7. In order to get the quick report printed out now, you must select the menu entry "File / Create ...".

Further descriptions and examples can be found at the 4D documentation center:

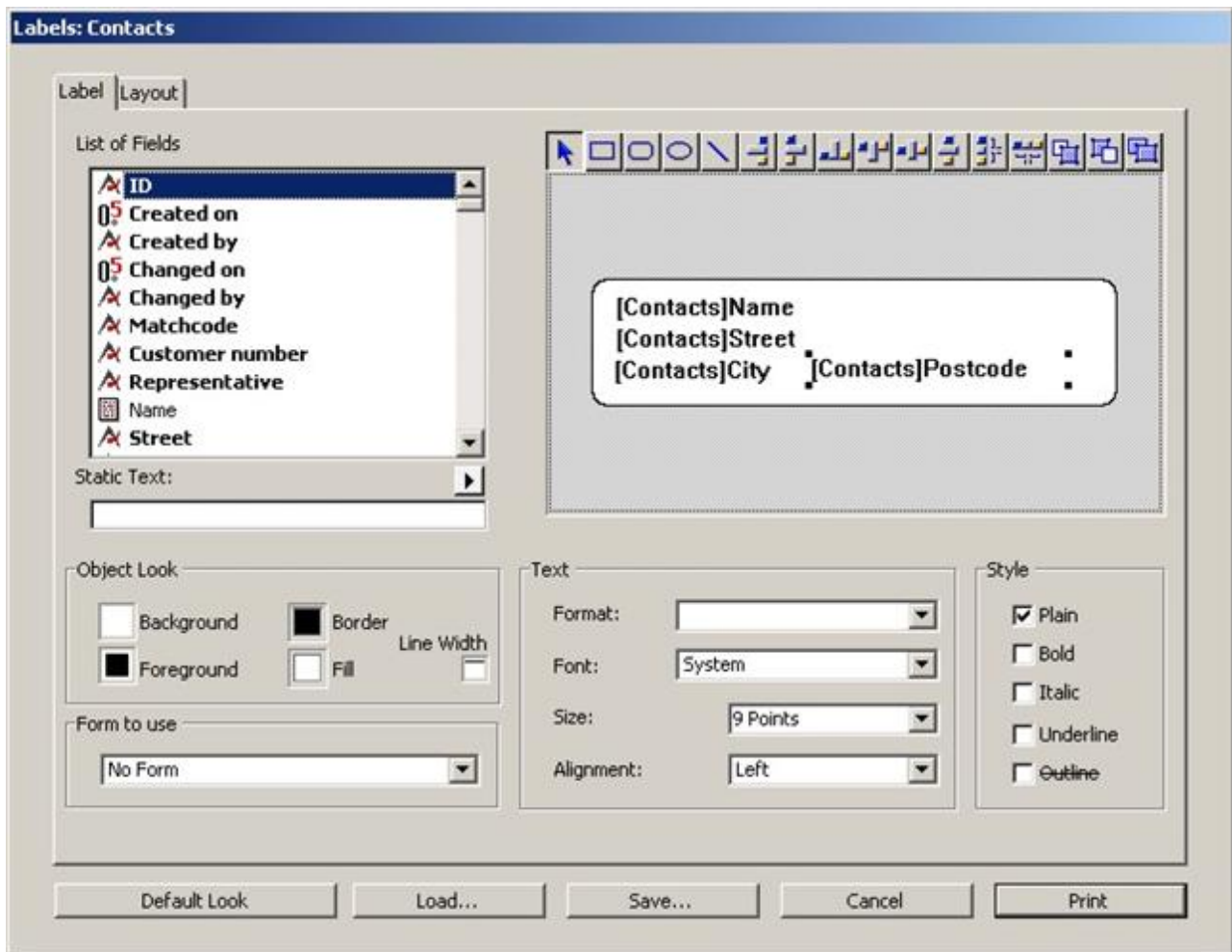
<http://doc.4d.com/4Dv12/4D/12.4/Quick-reports.200-1015827.en.html>

9.4 Label editor

For parcel, bar code or other labels, you determine the data, order and format for the label to be provided in this editor. In order to open the label editor, proceed as follows:

1. Open either the "Contacts" module or the "Article" module.
2. Highlight at least one file and choose one of three print commands:
 - "Print/Label - Article label" (Article)
 - "Print/Label - Pallet label" (Article)
 - "Print/Contacts - Mailing label" (Contacts)

3. In the print setup window, you activate the field "Print preview" and confirm with the pressed key combination Ctrl + ⬆ with "OK". Here the window of the label editor appears.

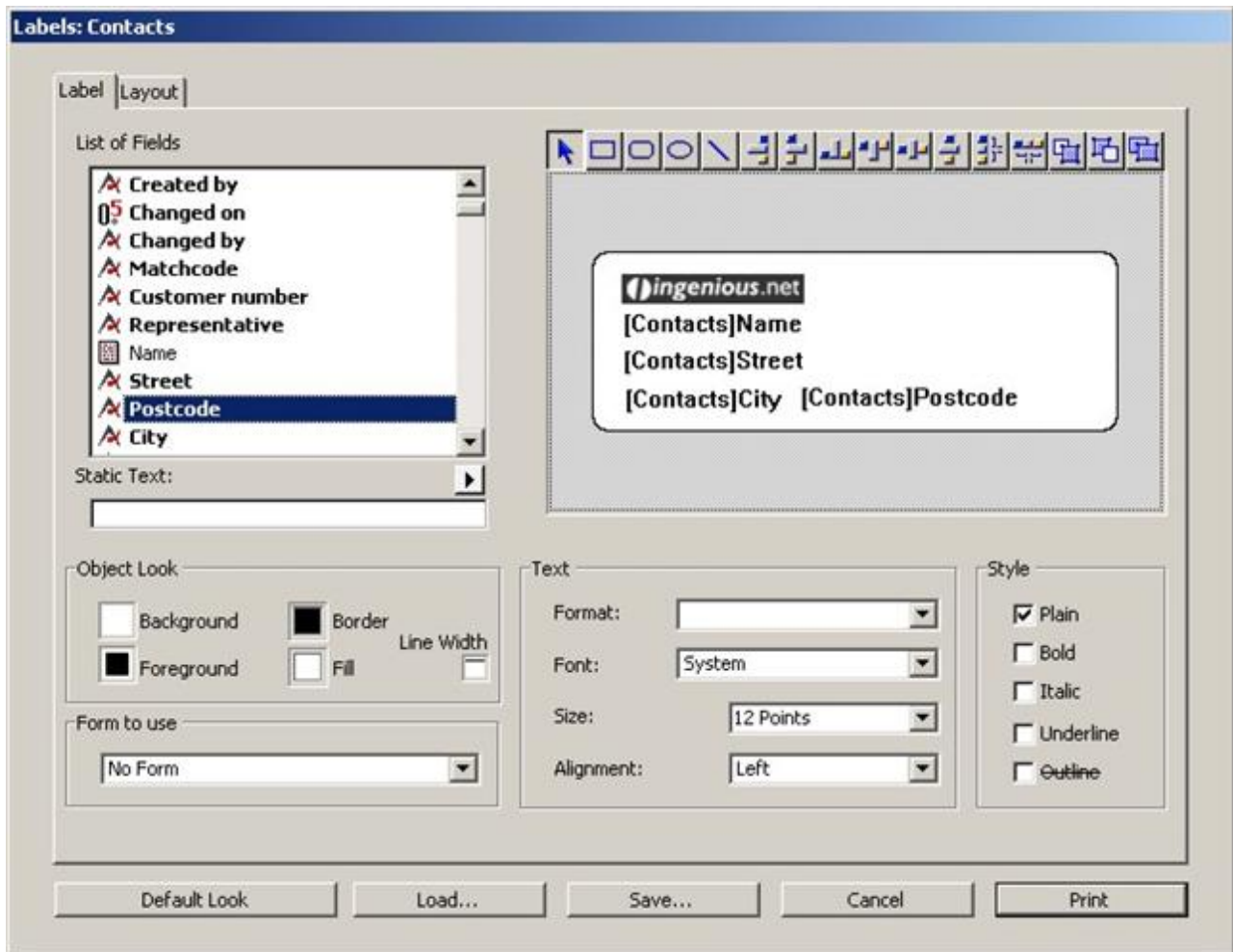


View of the label editor

Depending on which print command you have chosen, you are now in the corresponding label.

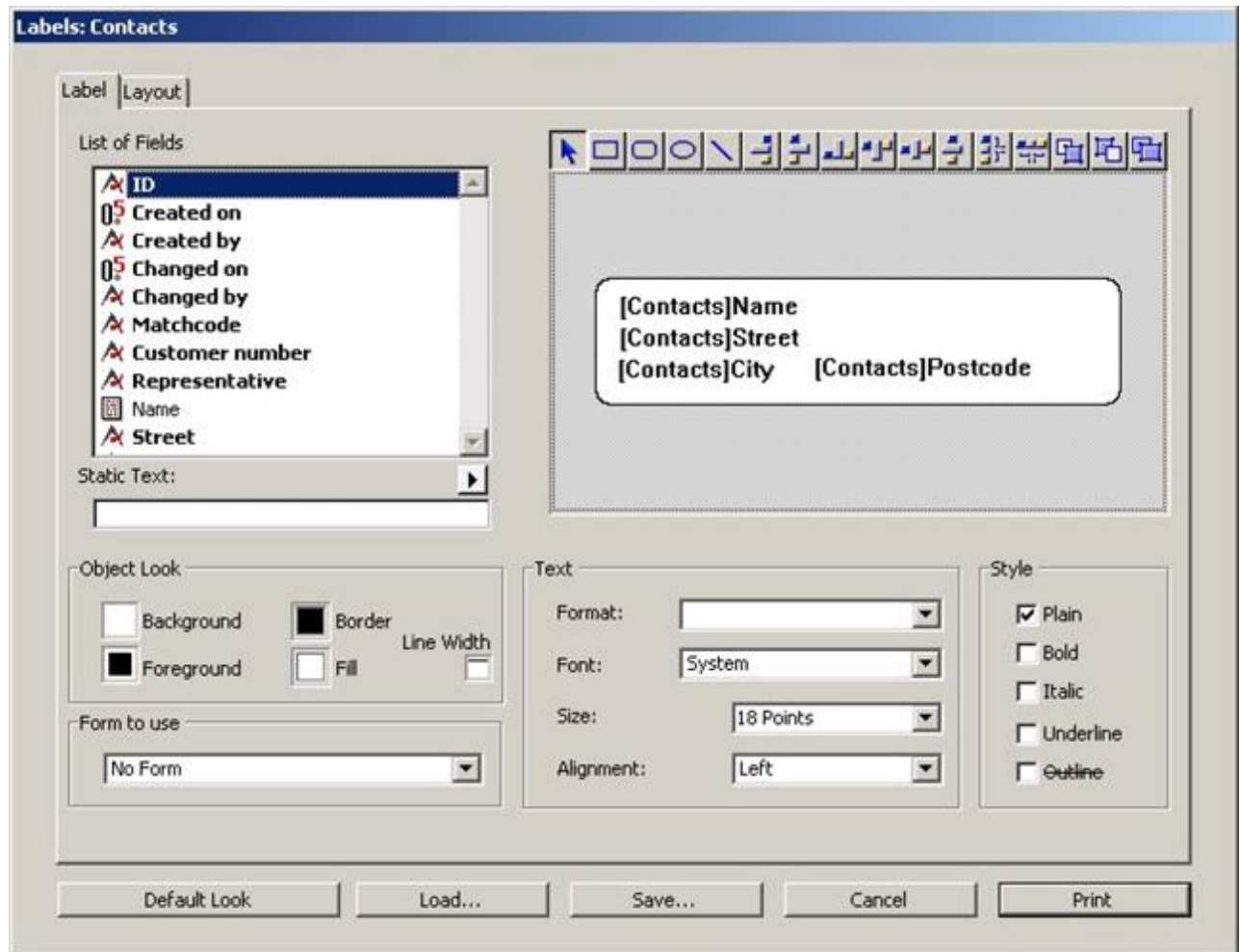
Printing the company logo and/or picture on a label

A picture, such as the company logo for example, can only be inserted with the clipboard in the label and be printed. This means that the picture must be opened in paint at first and copied before you can simply insert it with the label editor in the label.



Practice creating labels

1. Open the label editor and remove (if necessary) the already available entries from the preview of the current labels with the help of the "Delete" key. In this exercise, a mailing label should be provided.
2. Pull the necessary data fields (name and address data) from the field list into the preview area.

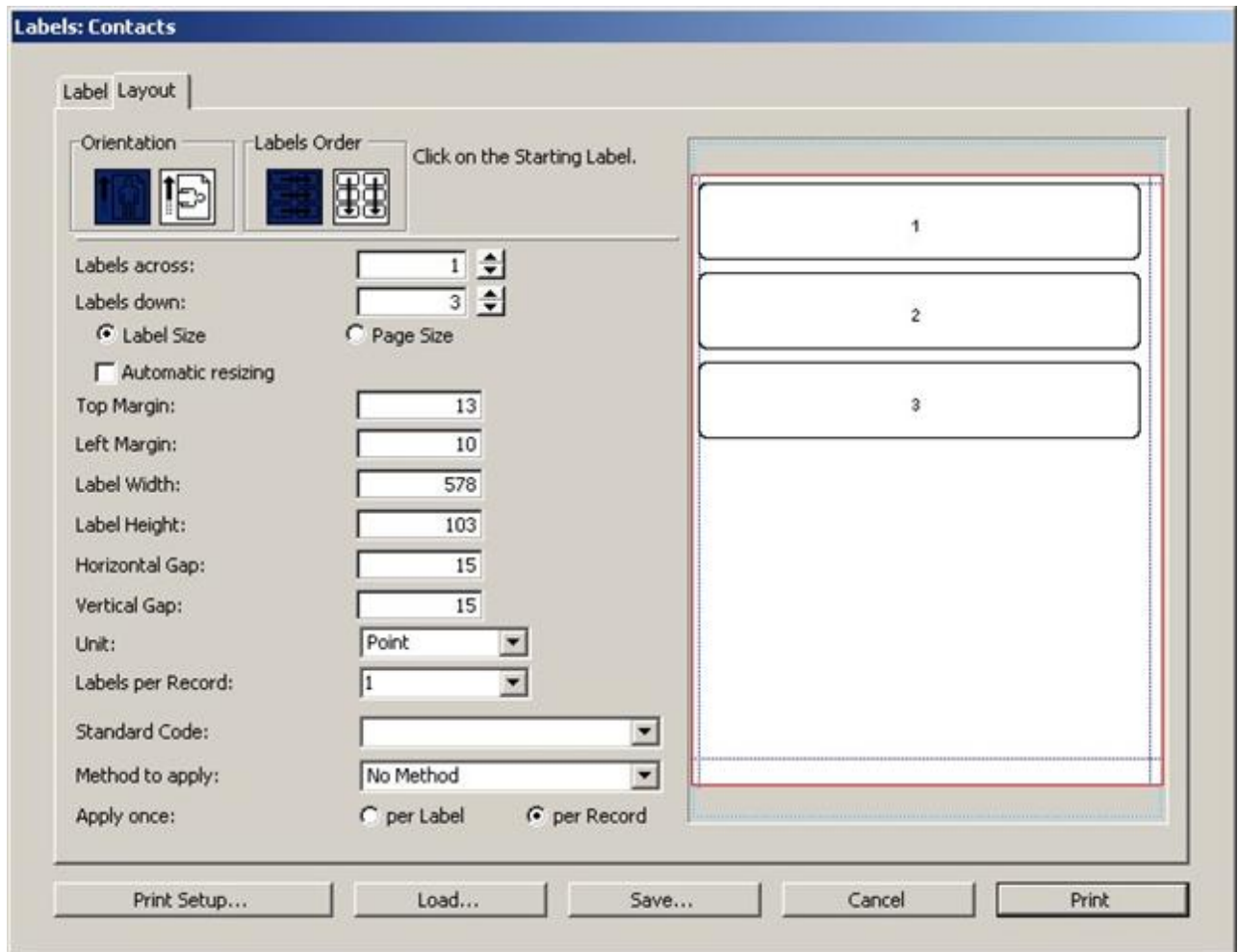


By clicking the fields located in the preview, you can change your position with the mouse and optionally change the size. Also the display (style), font size (text) as well as the font (text) and font color (object display) can be individually edited with the help of the corresponding setup areas.

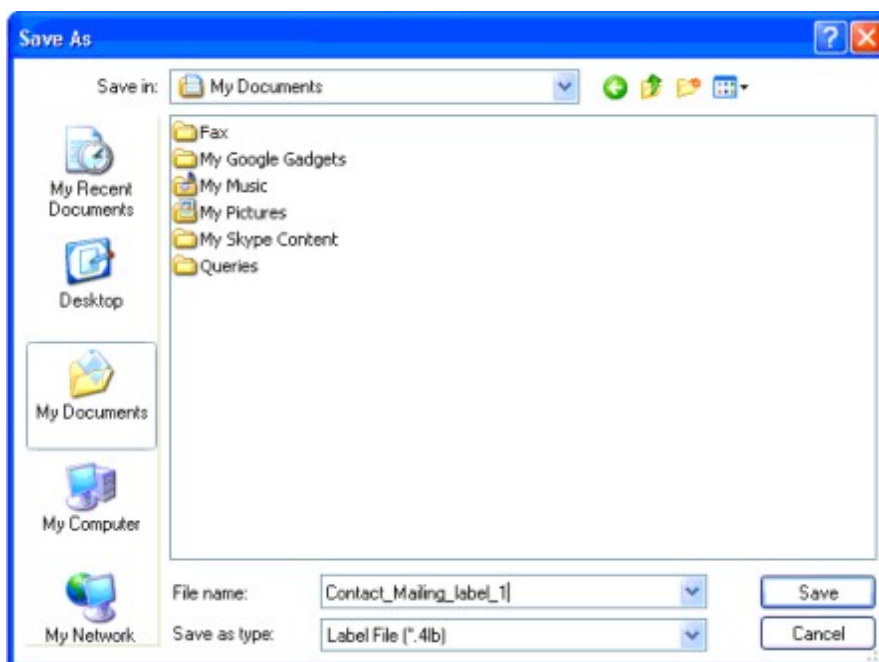
3. Edit the label with the available tool bar.



4. In the tab, switch to "Size" in order to meet other settings for the printing.



5. When you have finished your label, you click on the button "Save..." to save the label. Switch to folder "Label", there you choose the folder "Contacts" and save there your label as "Parcellabel2".



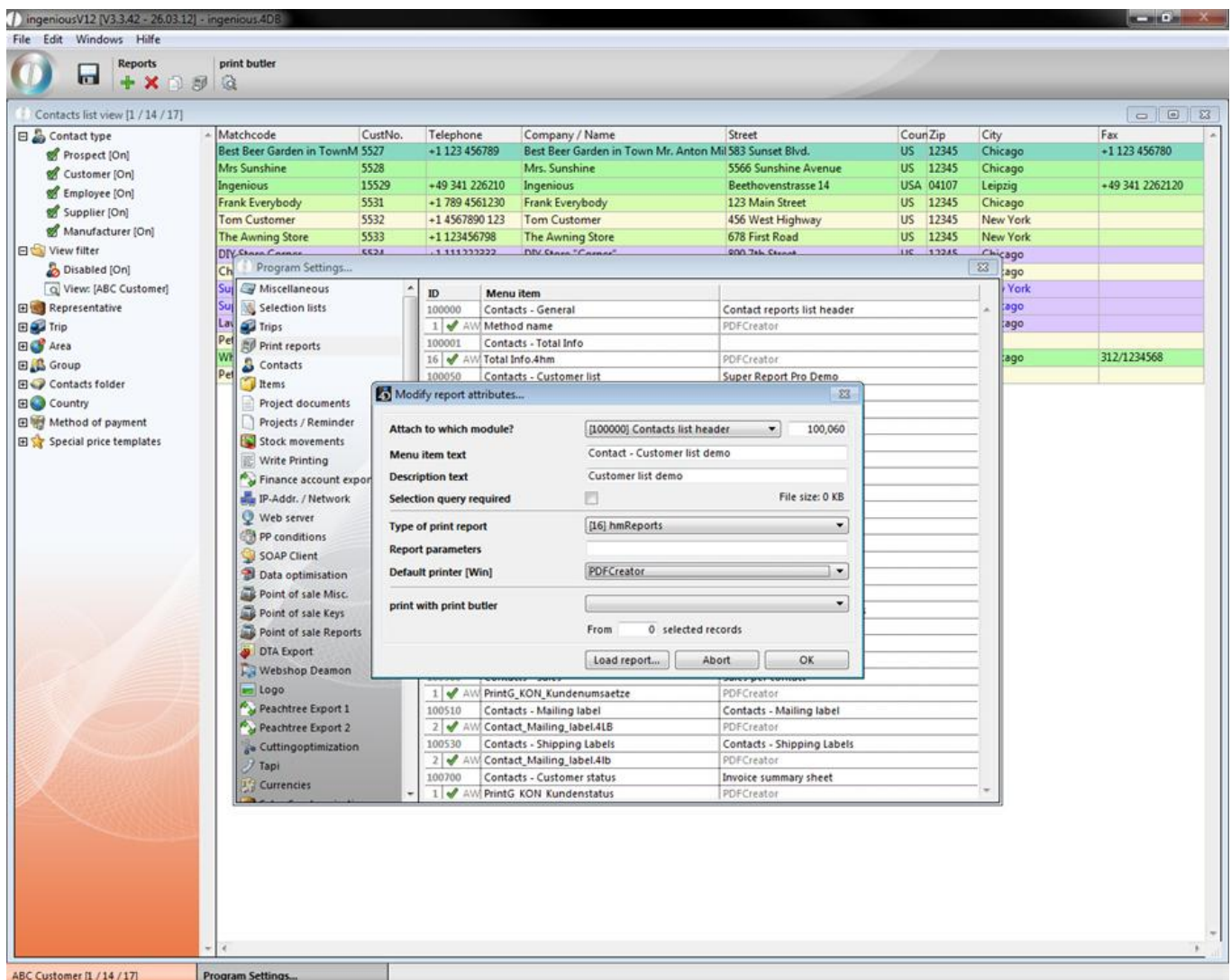
Standard dialogue window for saving

The label editor is provided by database engine 4D. Further information and tutorials can be found at the 4D documentation center:

<http://doc.4d.com/4Dv12/4D/12.4/Label-editor.200-1015817.en.html>

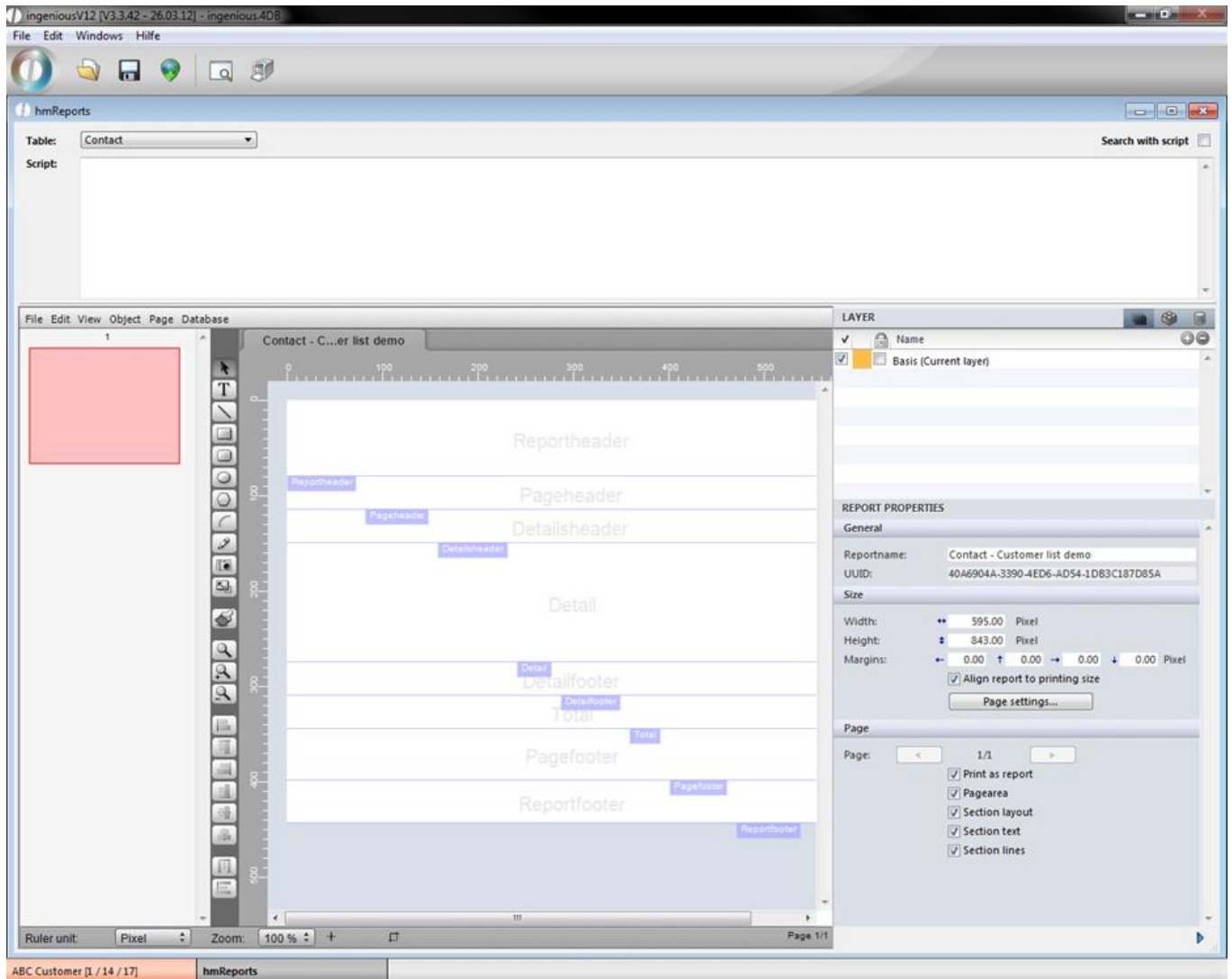
9.5 hm Report


hmReport is a new plugin to create reports, which you can buy at Ingenious GmbH. In the program settings it can be assigned to any module with the print report "[16] hmReport". In the following example a hmReport named "Contact – Customer list" for the module "Contacts" is created. If you want to load a existing report, you can do this by clicking "Load report..."

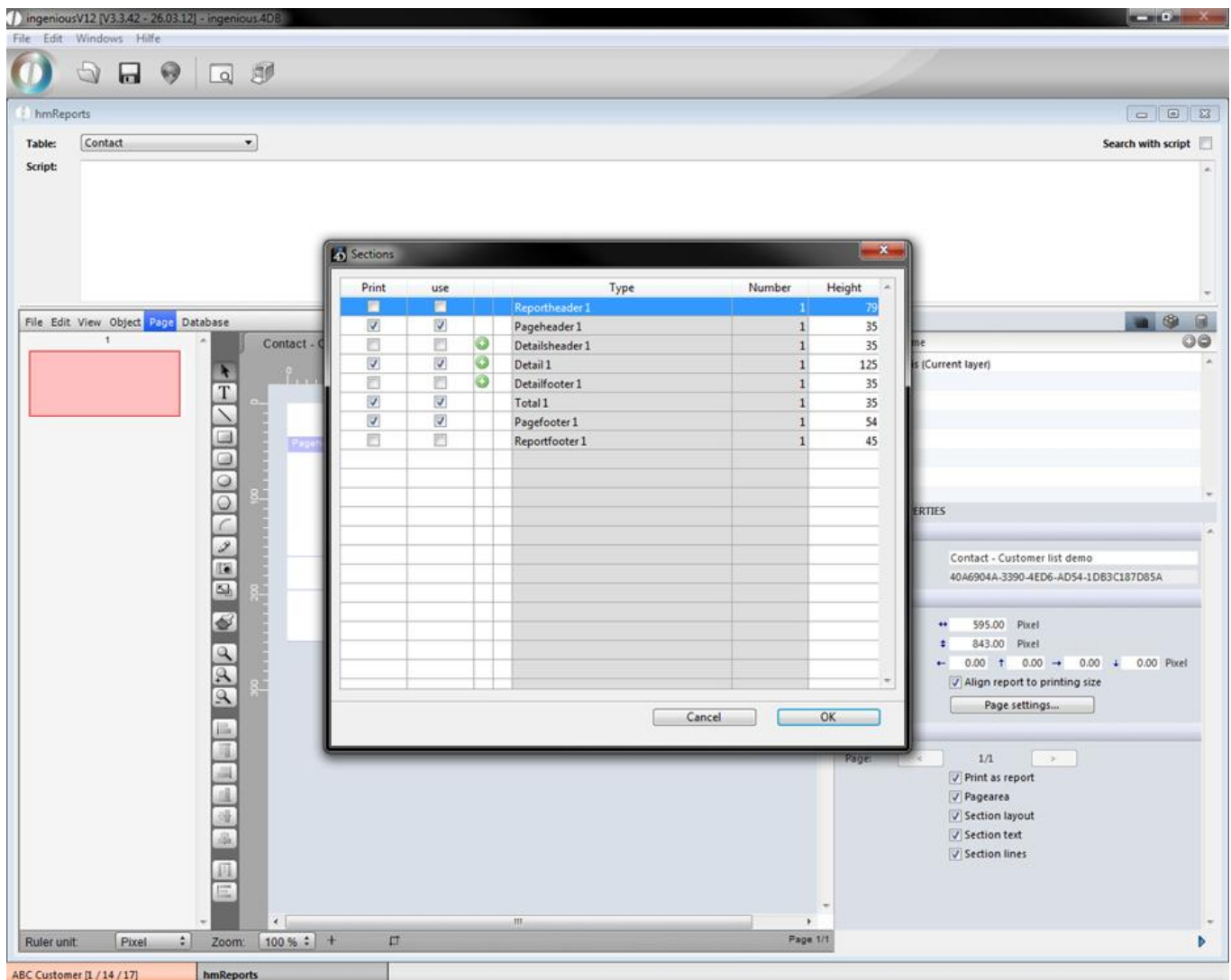


When you have created the print report, you have to enable the corresponding user- and report right, to be able to use the report.

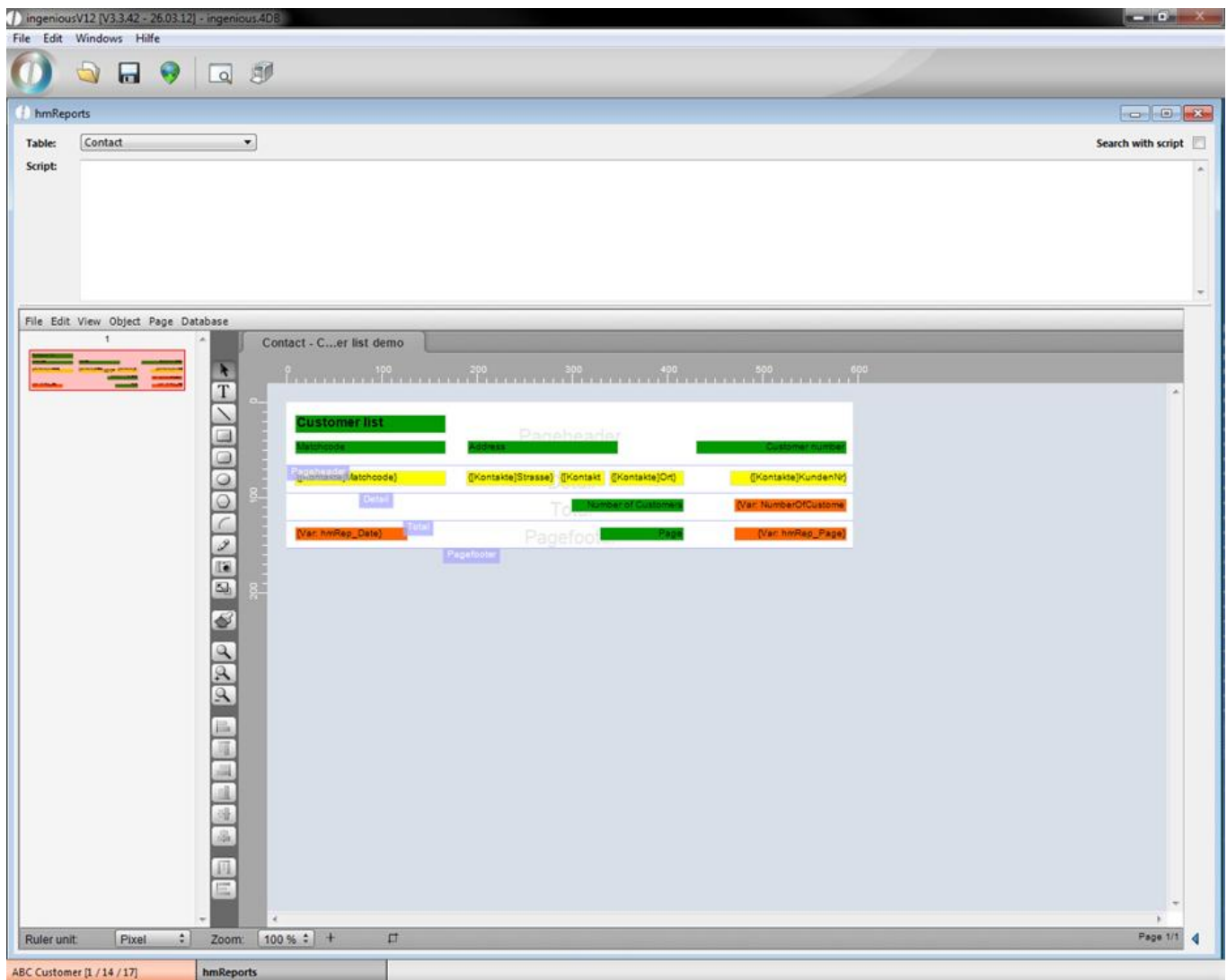
Now you can select the created report in the menu "Print". Meanwhile hold down Ctrl and Shift to get into the modification mode of the report.




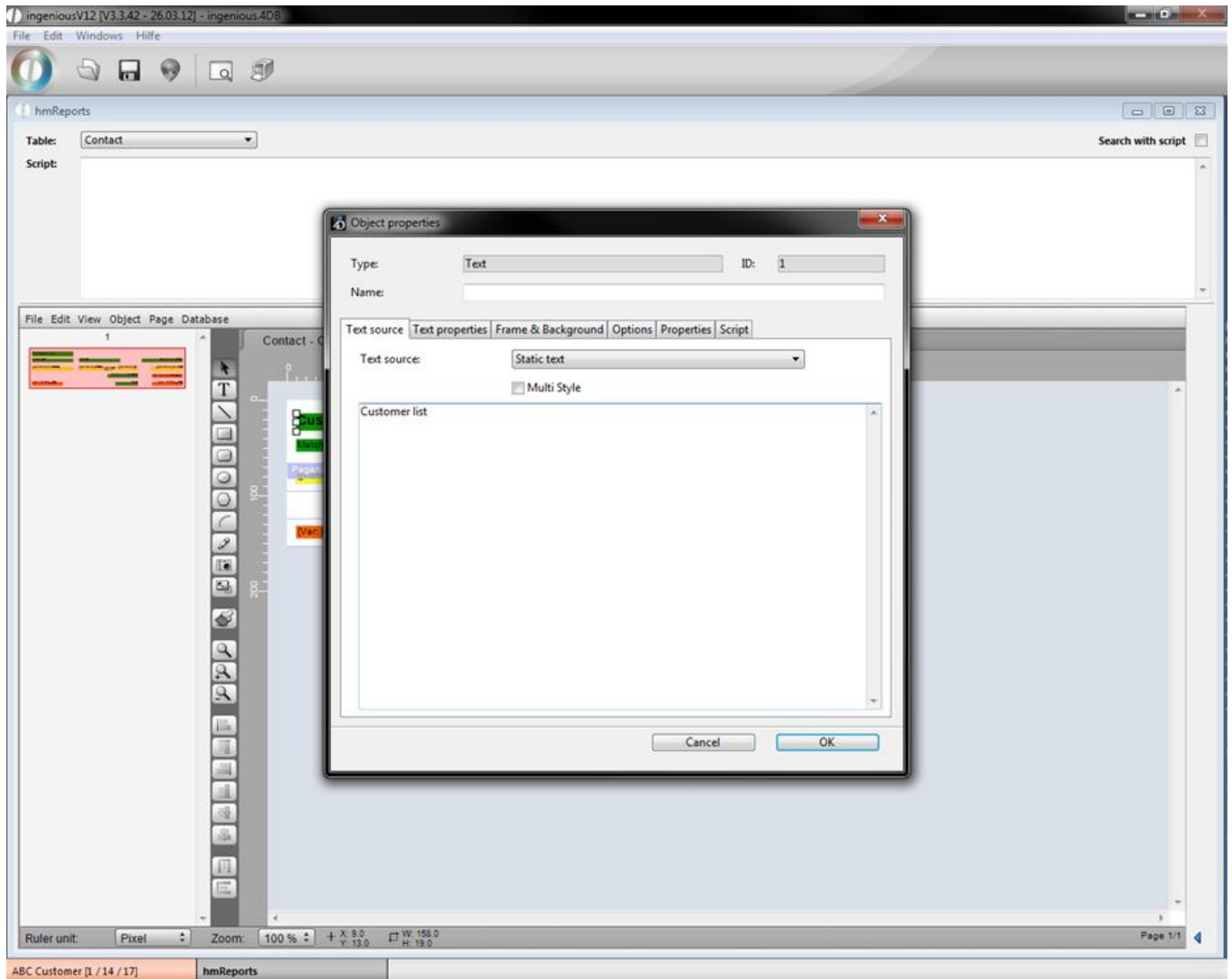
The hmReport window will open up. In the upper area you can choose the desired table, the report should refer to and add a script if necessary. In the lower area you can build an individual report with the help of the several menus, buttons and property bar (in the right area; to hide it click on ). The document contains many areas Reportheader, Pageheader, Detailsheader, For this example open menu -> page -> sections and do the following settings in the window:



For a better understanding in the following example the text areas will be displayed in green, database fields yellow and variables orange.

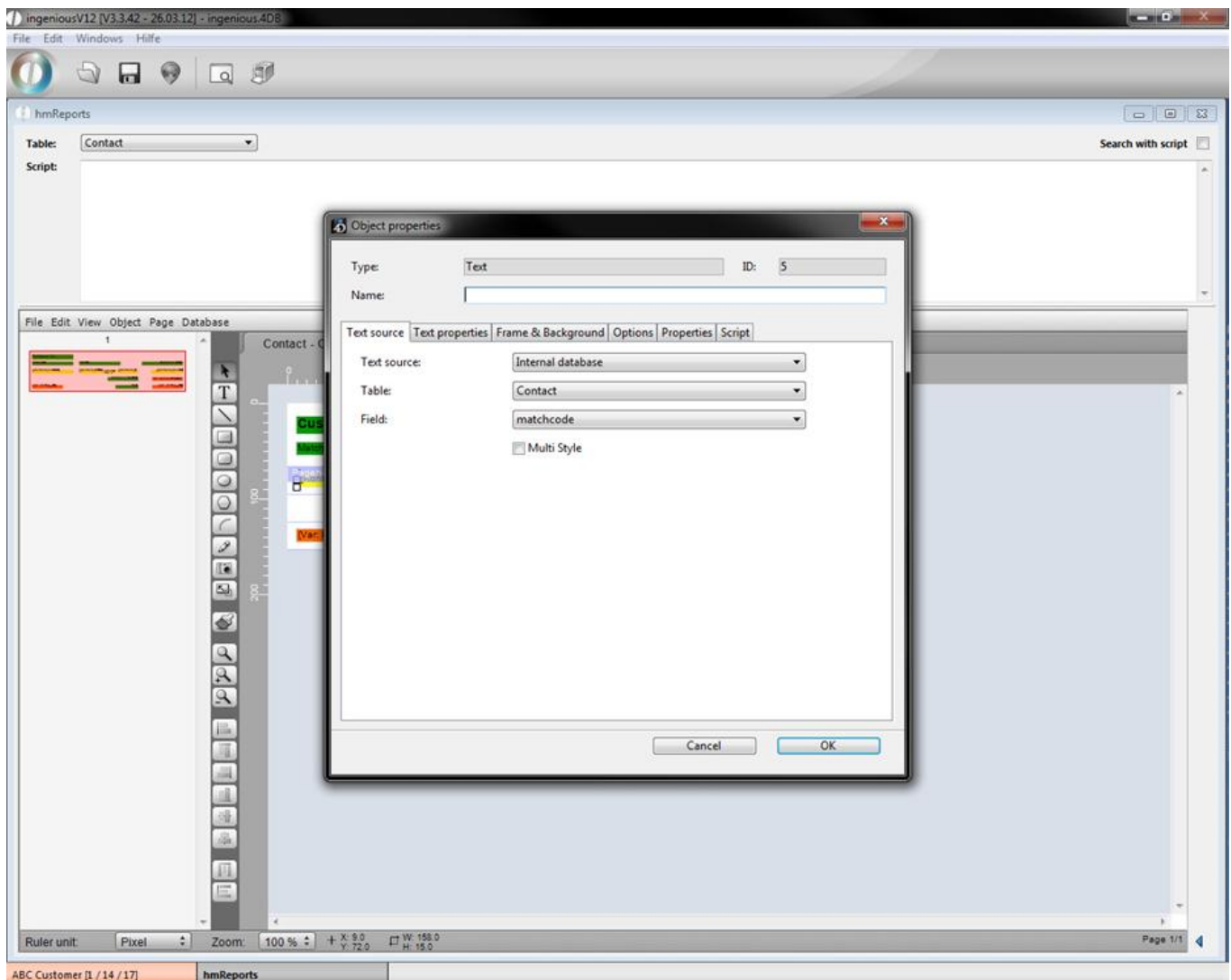


With the button  you can create a field. By double clicking the field the configuration window will be displayed, where you can choose what kind of field it is (static text, variable, array, ...).



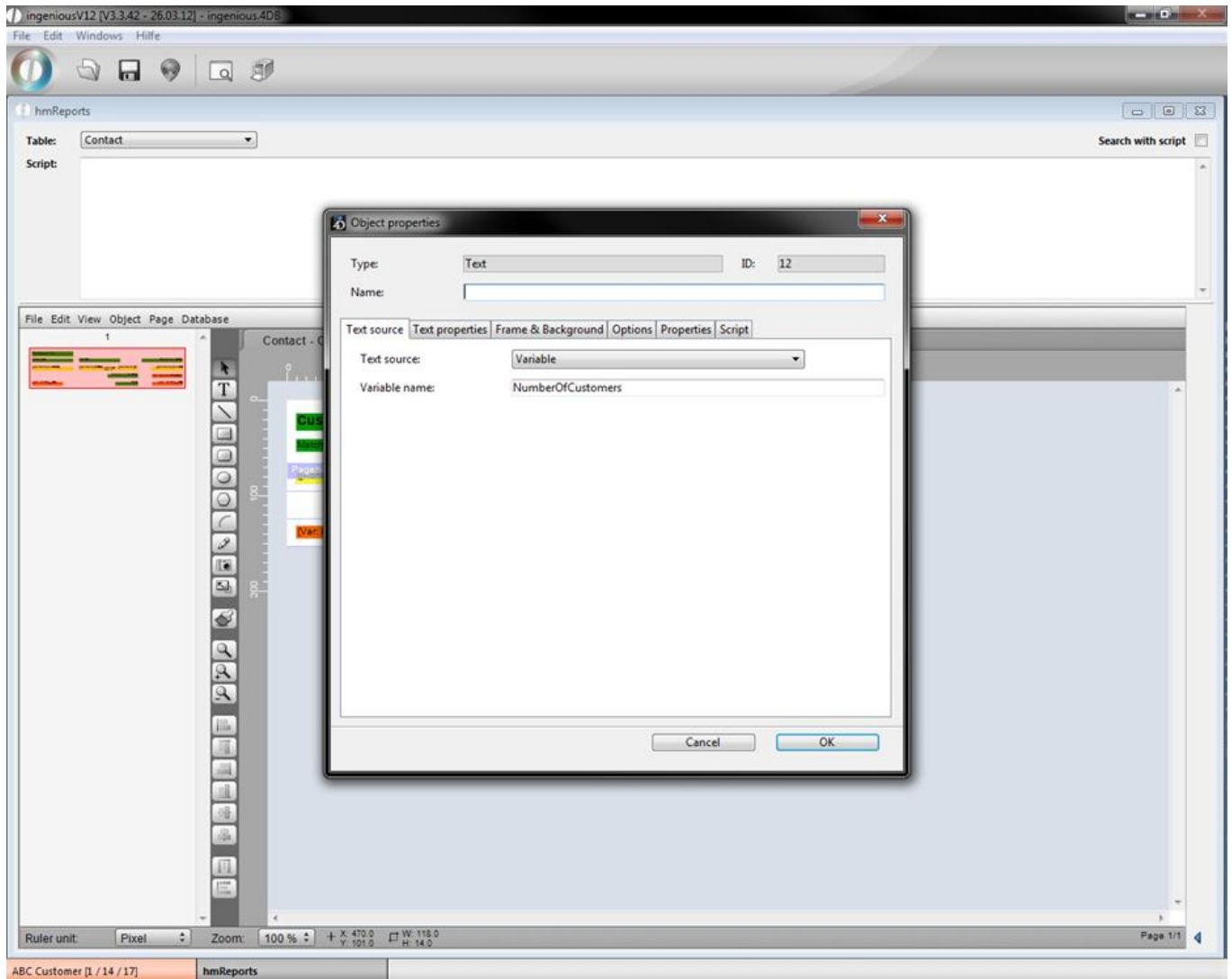
Modification window for a static text field

When you choose "Internal database" as the text source, you can choose the table and field the value comes from.

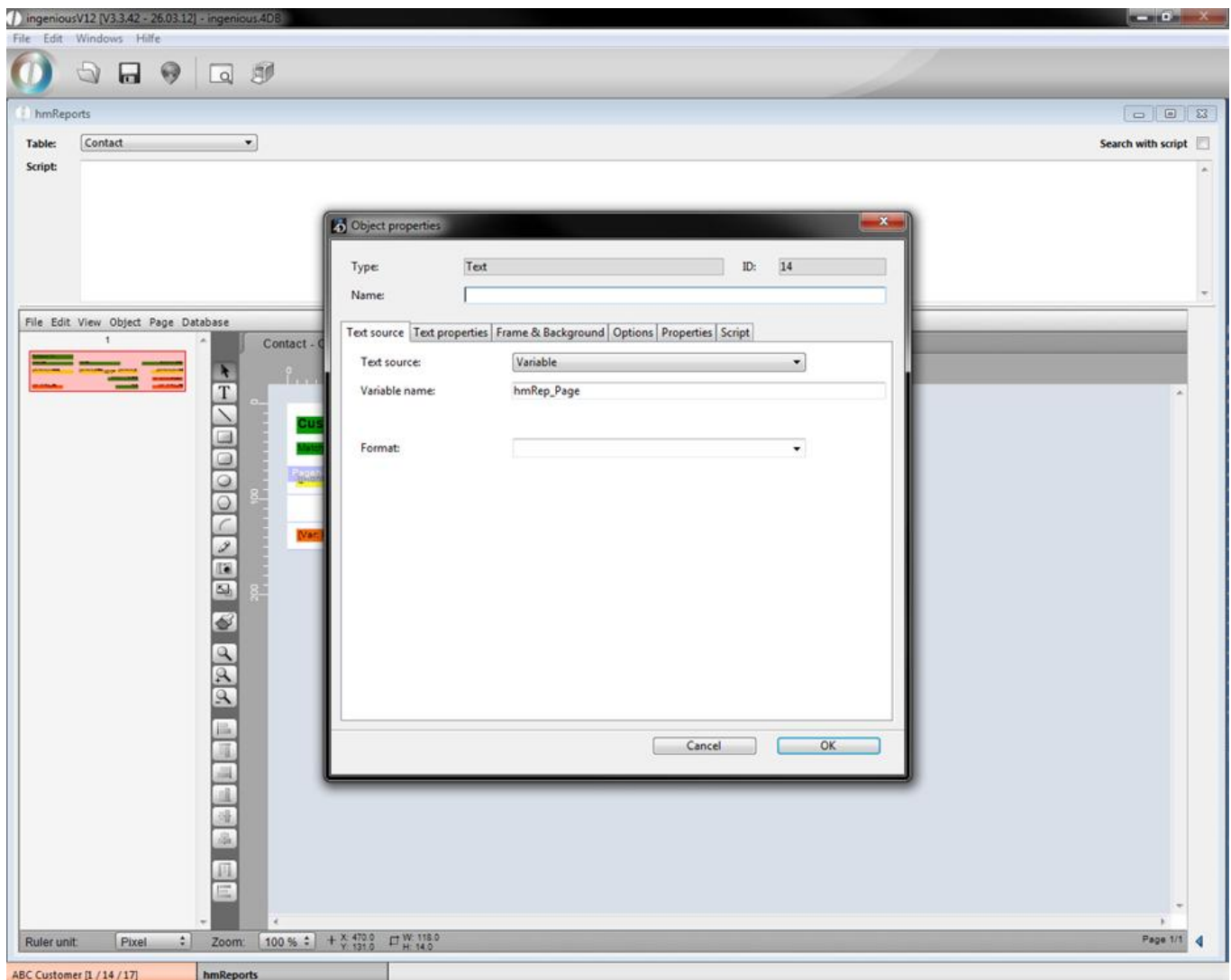


Modification window for an internal database field

If you choose "variable" as text source you have to enter a name in the field "Variable name" and can change the value of it per script. There are also some reserved names for variables containing several predefined functions. These names are "hmRep_Date" (to display the current date); "hmRep_Time" (to display the current time); "hmRep_Record" (contains the current iteration number) and "hmRep_Page" (to display the current page number).

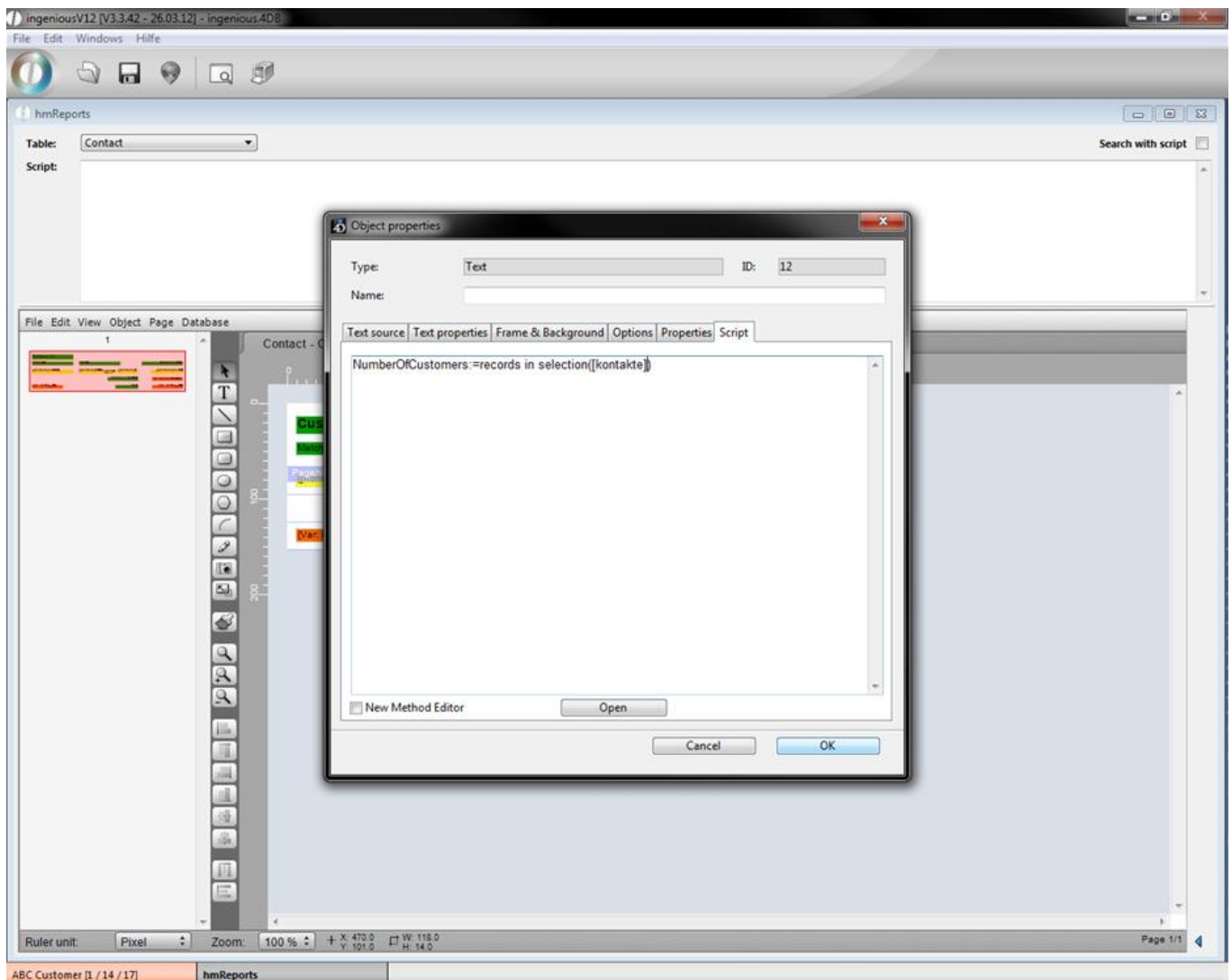


Variable "NumberOfCustomers"



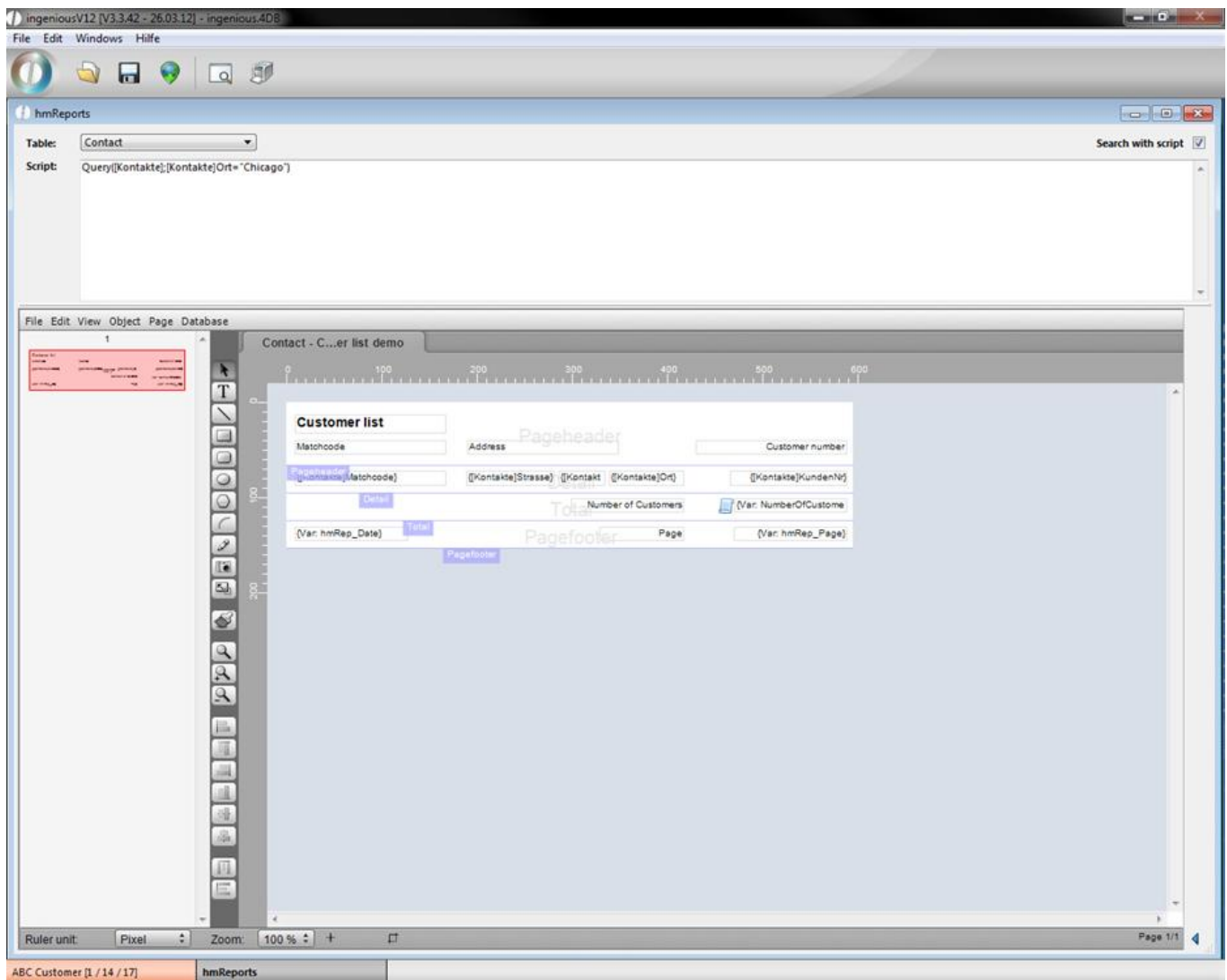
Predefined variable "hmRep_Page"


In the tab "Script" you can add a script, for instance to fill the current variable. In the following example the script saves the number of number of displayed records from the contacts table in the variable "NumberOfCustomers"

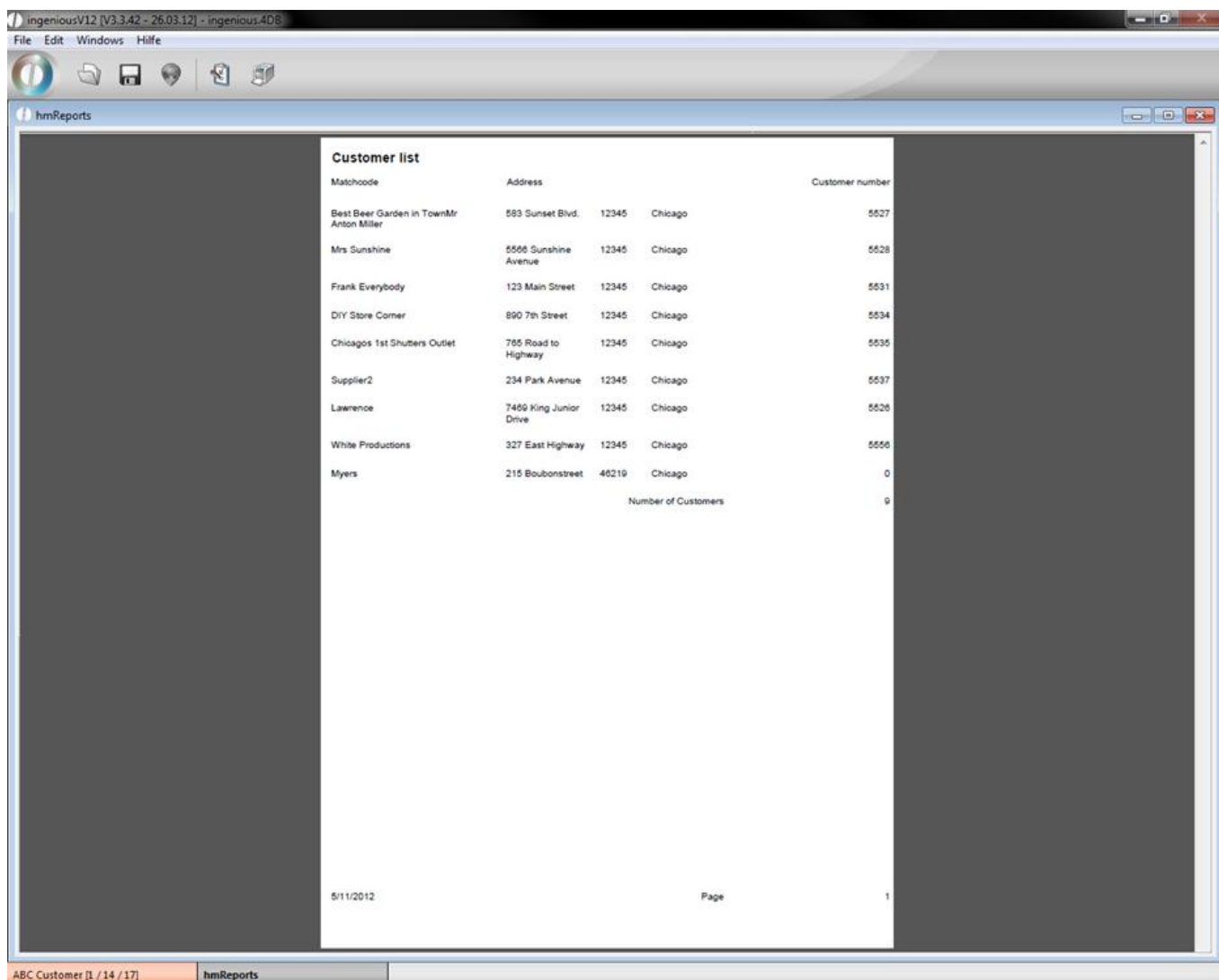




Script that changes value of "NumberOfCustomers"

You can also execute a script before the report is created, for instance to filter for the records you want to display. In the example a script was added that filters the contacts for the one that live in Chicago.



By clicking the button  the print preview will be created. For the example it will look like this:

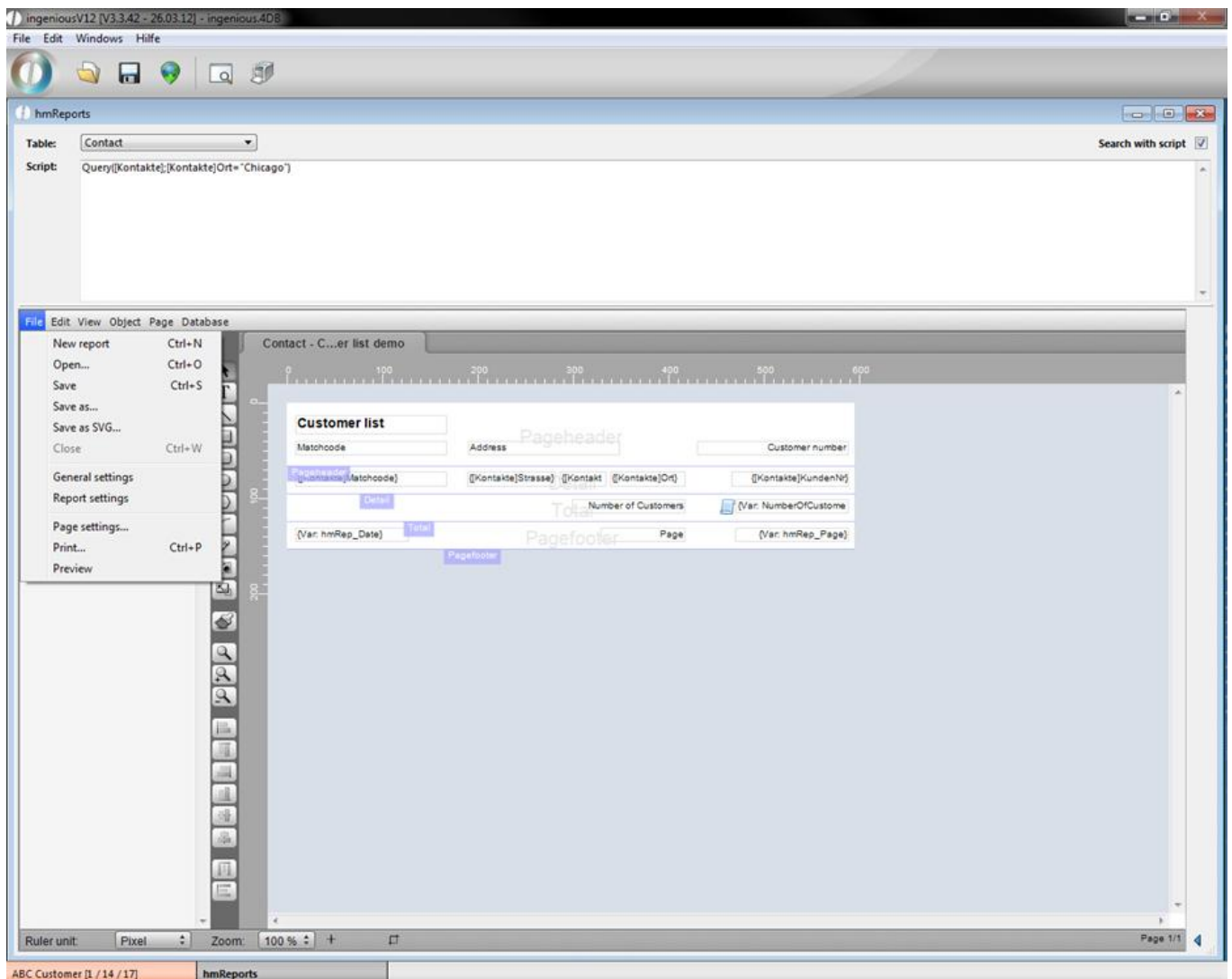


When you click on the button  you will switch back to modification view of the report; or you can directly print it by clicking the printer icon .

Menu bar

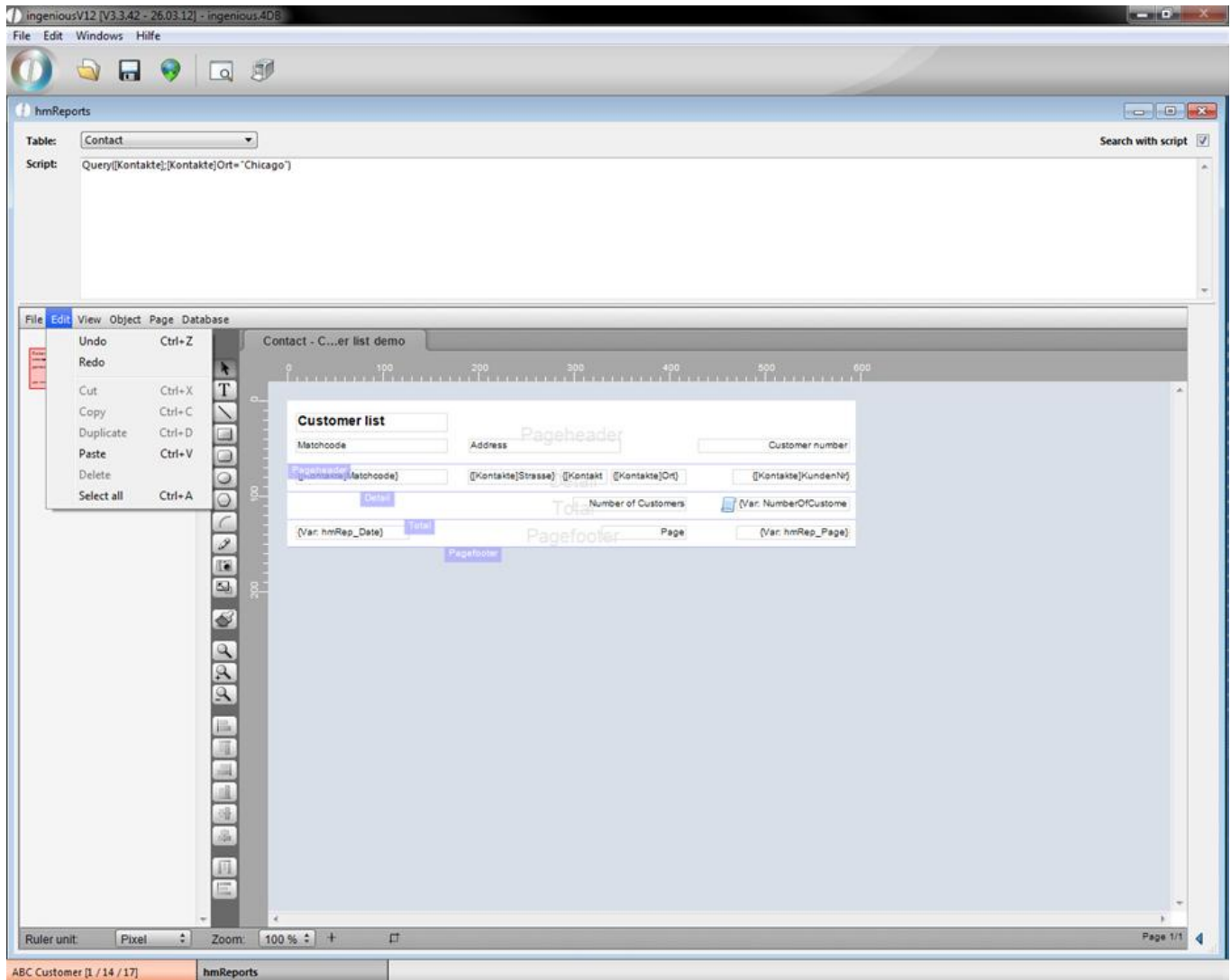
File...

- | | |
|----------------------|---|
| ... New Report | Create a new report |
| ... Open... | Open a report from disk |
| ... Save... | Save current report to disk |
| ... Save as... | Save current report to disk |
| ... Save as SVG... | Save report as SVG file |
| ... Close | Close tab of report (if it contains multiple pages) |
| ... General settings | Settings for the report editor |
| ... Report settings | Settings for the report |
| ... Page settings... | Settings for the printed document |
| ... Print... | Print report |
| ... Preview | Open preview of the report |



Edit...

- | | |
|---------------|------------------------------|
| ...Undo | Undo modification |
| ...Redo | Redo modification |
| ...Cut | Cut selected object(s) |
| ...Copy | Copy selected object(s) |
| ...Duplicate | Duplicate selected object(s) |
| ...Paste | Paste clipboard content |
| ...Delete | Delete selected object(s) |
| ...Select all | Select all objects |

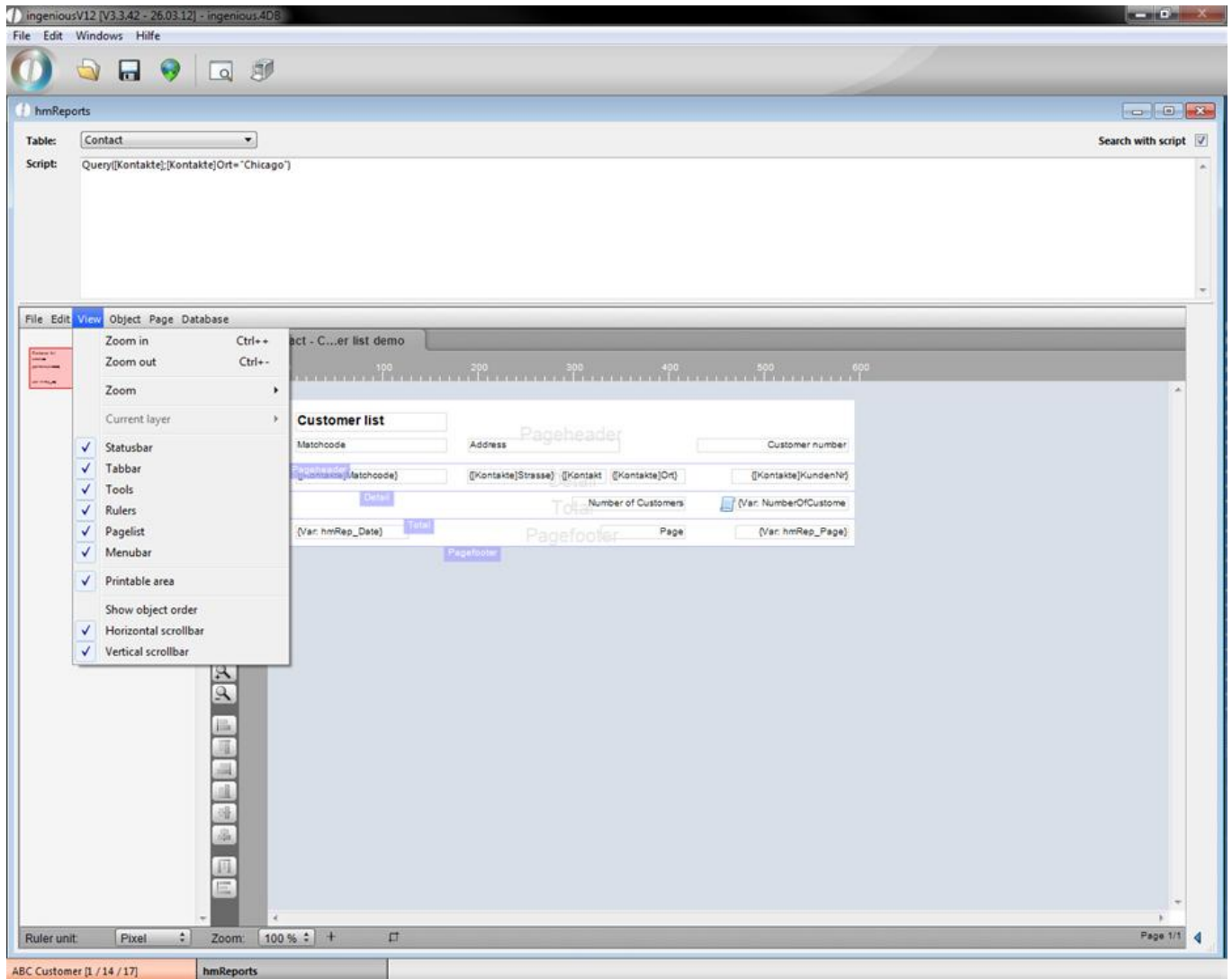


View...

- | | |
|-------------------|-------------------------------------|
| ... Zoom in | Increase the zoom factor |
| ... Zoom out | Decrease the zoom factor |
| ... Zoom... | Select predefined zoom factor |
| ... Current layer | Select the layer you want to modify |

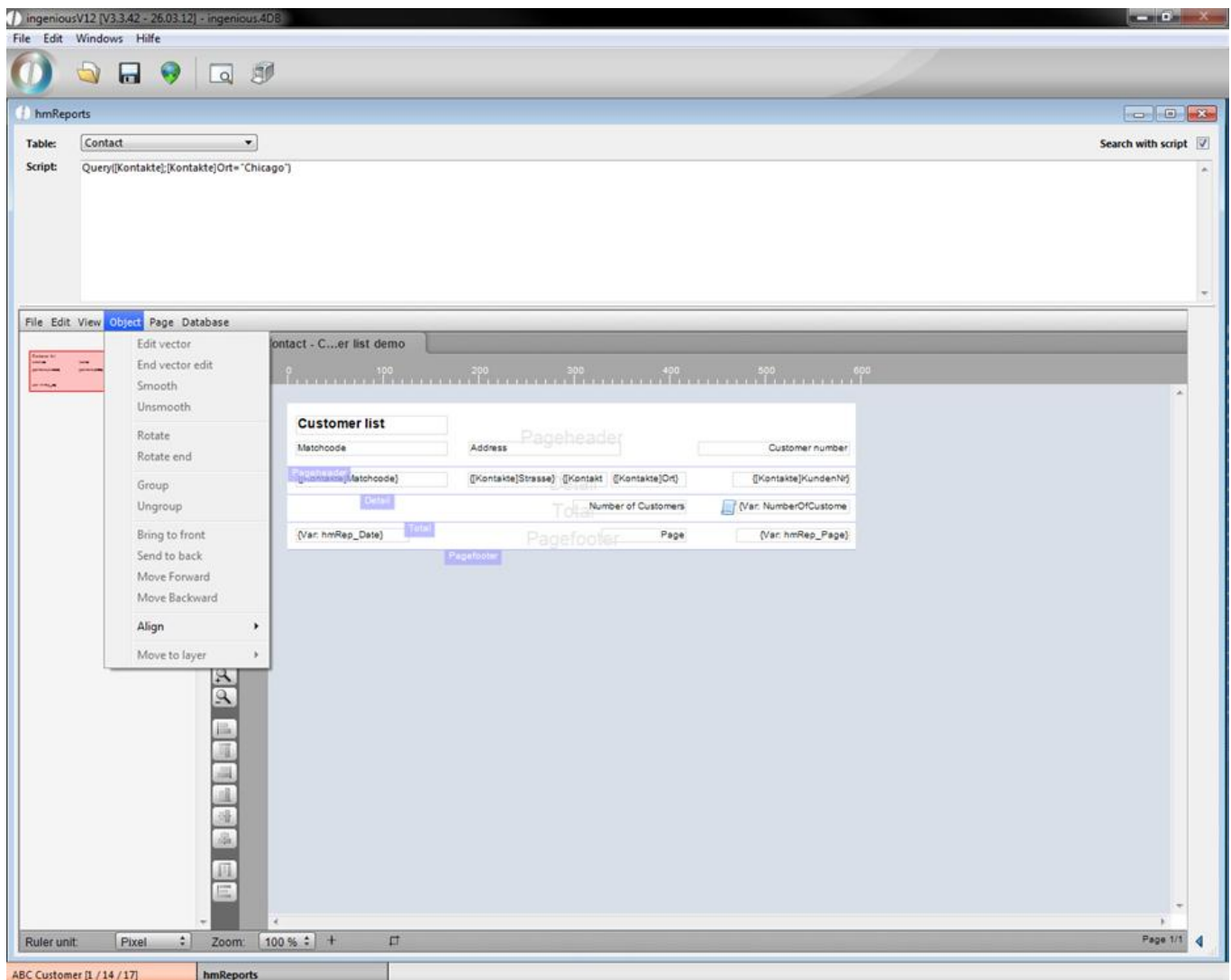
The following menu entries will toggle the visibility of the named window objects

- | | |
|--------------------------|--|
| ... Statusbar | |
| ... Tabbar | |
| ... Tools | |
| ... Rulers | |
| ... Pagelist | |
| ... Menubar | |
| ... Printable area | Show/hide border of the printable area |
| ... Show object order | Show/hide object order number |
| ... Horizontal scrollbar | Show/hide horizontal scrollbar |
| ... Vertical scrollbar | Show/hide vertical scrollbar |



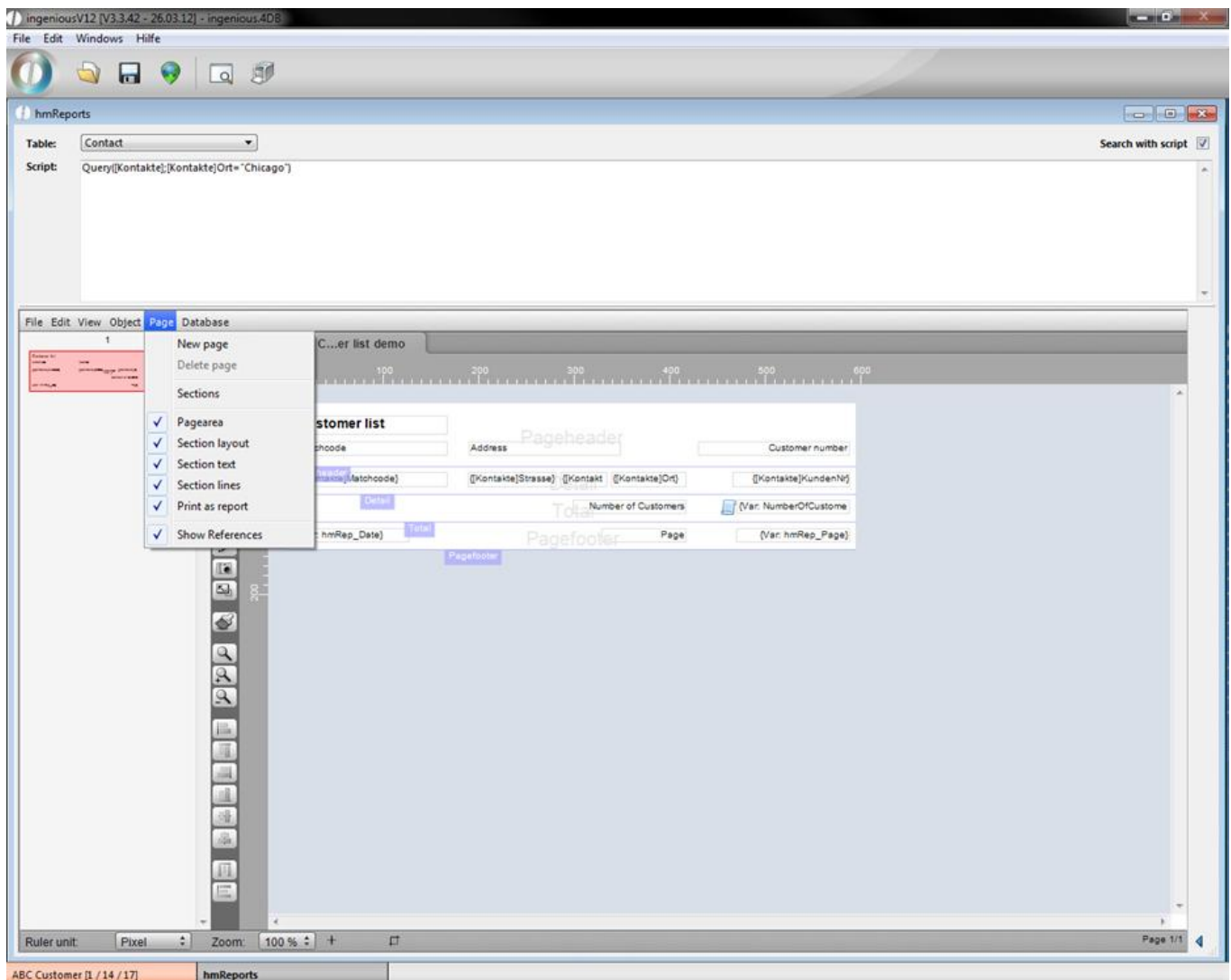
Object...

... Edit vector	Modify a vector graphic
... End vector edit	Modification finished
... Smooth	Make vector graphic smoother
... Unsmooth	Make vector graphic unsmooth
... Rotate	Rotate object
... Rotate end	Rotation finished
... Group	Group selected objects
... Ungroup	Ungroup selected objects
... Bring to front	Move selected object to the front
... Send to back	Move selected object to the background
... Move forward	Move selected object one layer up
... Move Backward	Move selected object on layer down
... Align...	Set the alignment of the selected objects
... Move to layer...	Move object(s) to certain layer



Page...

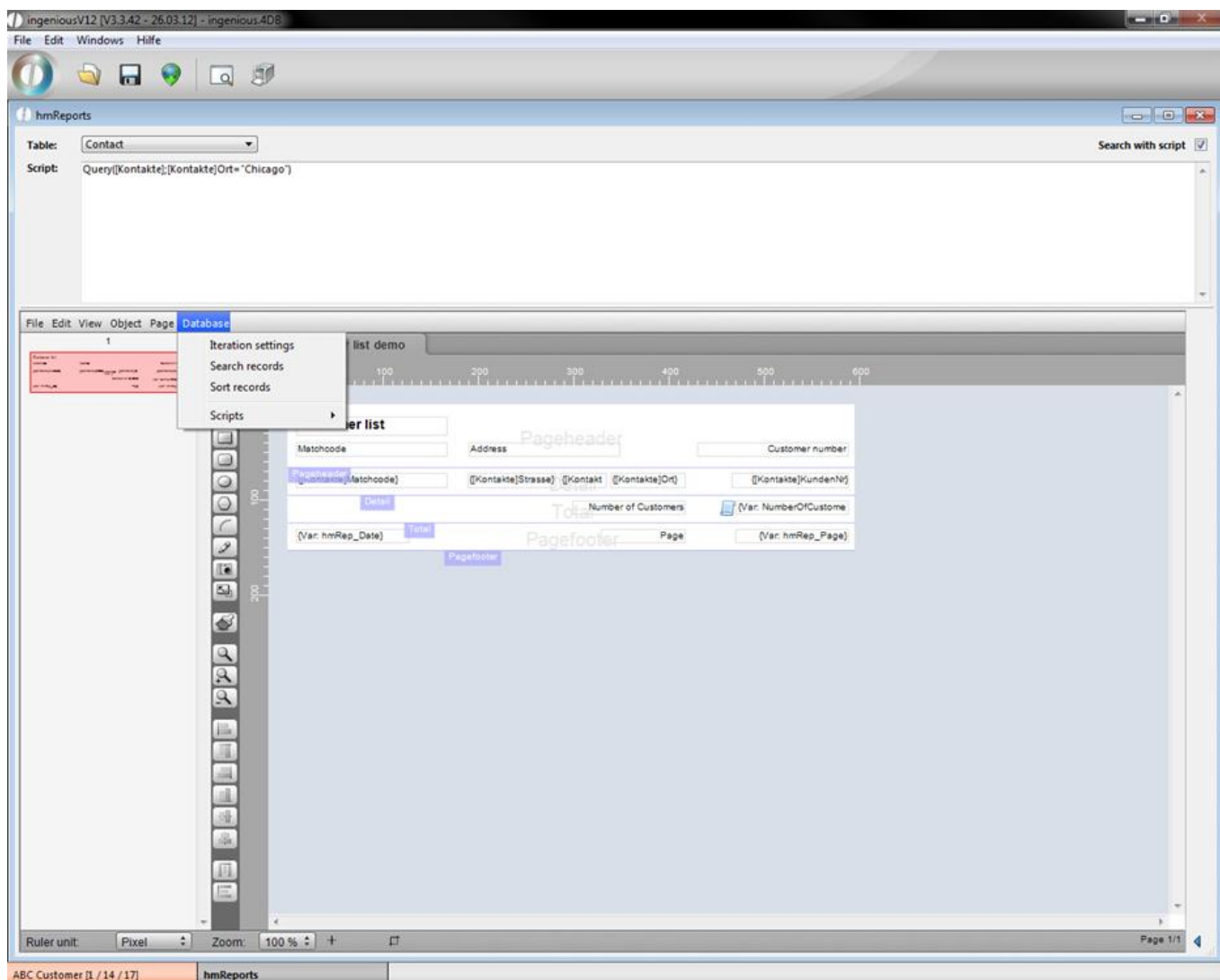
- ... New page
 - ... Delete page
 - ... Sections...
 - ... Pagearea
 - ... Section layout
 - ... Section text
 - ... Section lines
 - ... Print as report
 - ... Show references
- Add page to report
 - Delete page from report
 - Manage the sections of the report
 - Hide/unhide page border
 - View only sections/whole page
 - Hide/Unhide section texts
 - Hide/Unhide section lines
 - Print report as report (objects will be replaced with values) or not
 - Show references or resolved values



Database...

- ... Iteration settings
- ... Search records
- ... Sort records
- ... Scripts

- Define how often the detail section should be repeated (here contact record number)
- Look for certain records
- Sort selected records
- Add scripts to events/sections




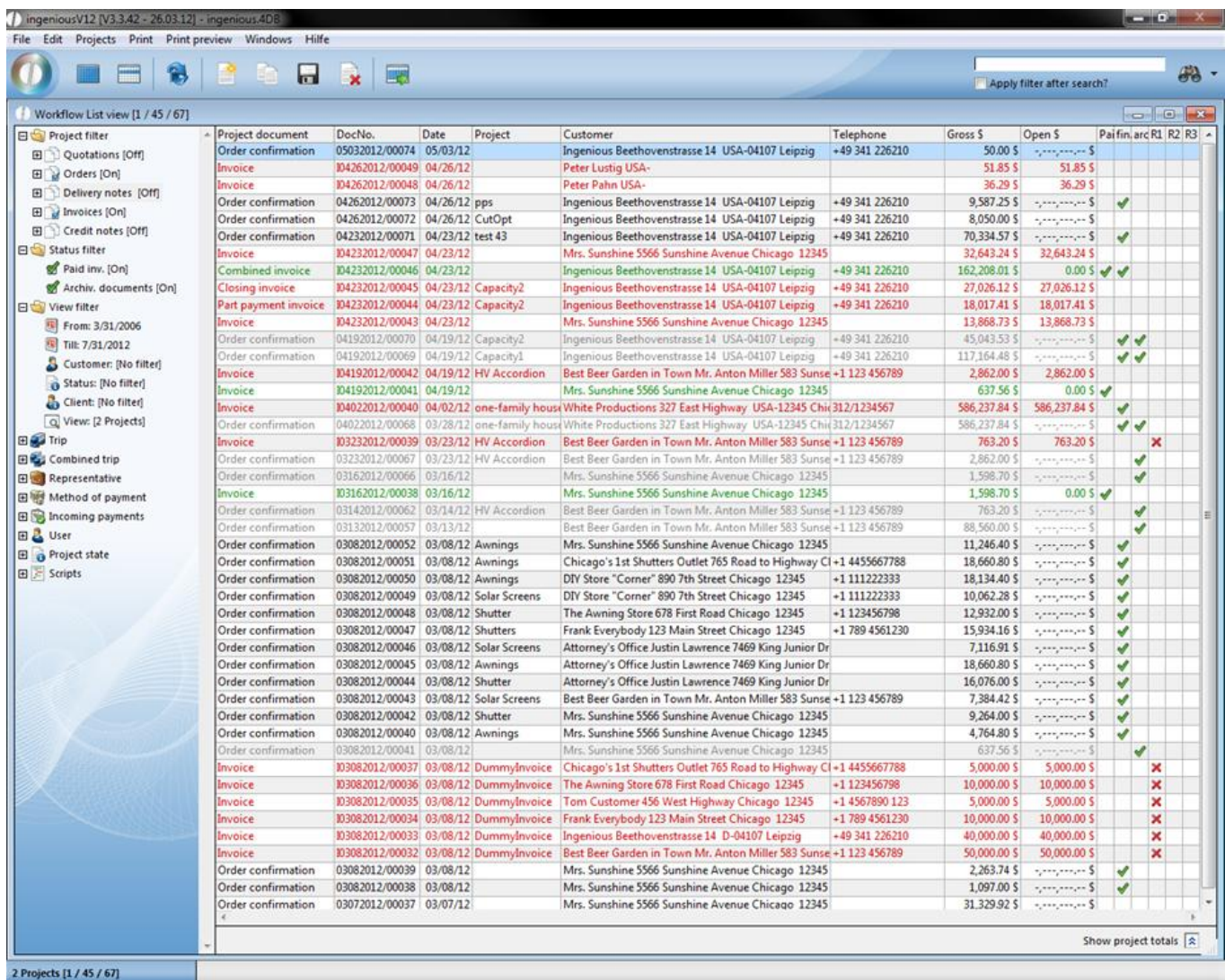
Useful script functions

Syntax	Descriptiong	Example
Result:=My_Request("Question")	Opens a request dialog where the user has to enter string	city:=My_Request("Which city should be considered?") QUERY([kontakt];[kontakte]Ort=city)
My_Confirm("Question")	Opens a yes/no dialog	My_Confirm("Only display documents, that were printed today?") If(OK=1) QUERY([Projekte];[Projekte]Gedruckt am=Current date()) Else ALL RECORDS([Projekte]) End if

CW_SetPrefs	Opens the date picker	CW_SetPrefs
CW_SetDate(Current date)		CW_SetDate(Current date)
CW_OpenDialog		CW_OpenDialog
		If(OK=1)
		QUERY([Projekte];[Projekte]Gedruckt am=cwSelectDate)
		End if

9.6 Microsoft Excel Export

The excel export is a new function to transfer a complete list view of the modules Workflow, Items, Contacts, Project time recording and receipt entry to an excel document. To do so, just click on the button .

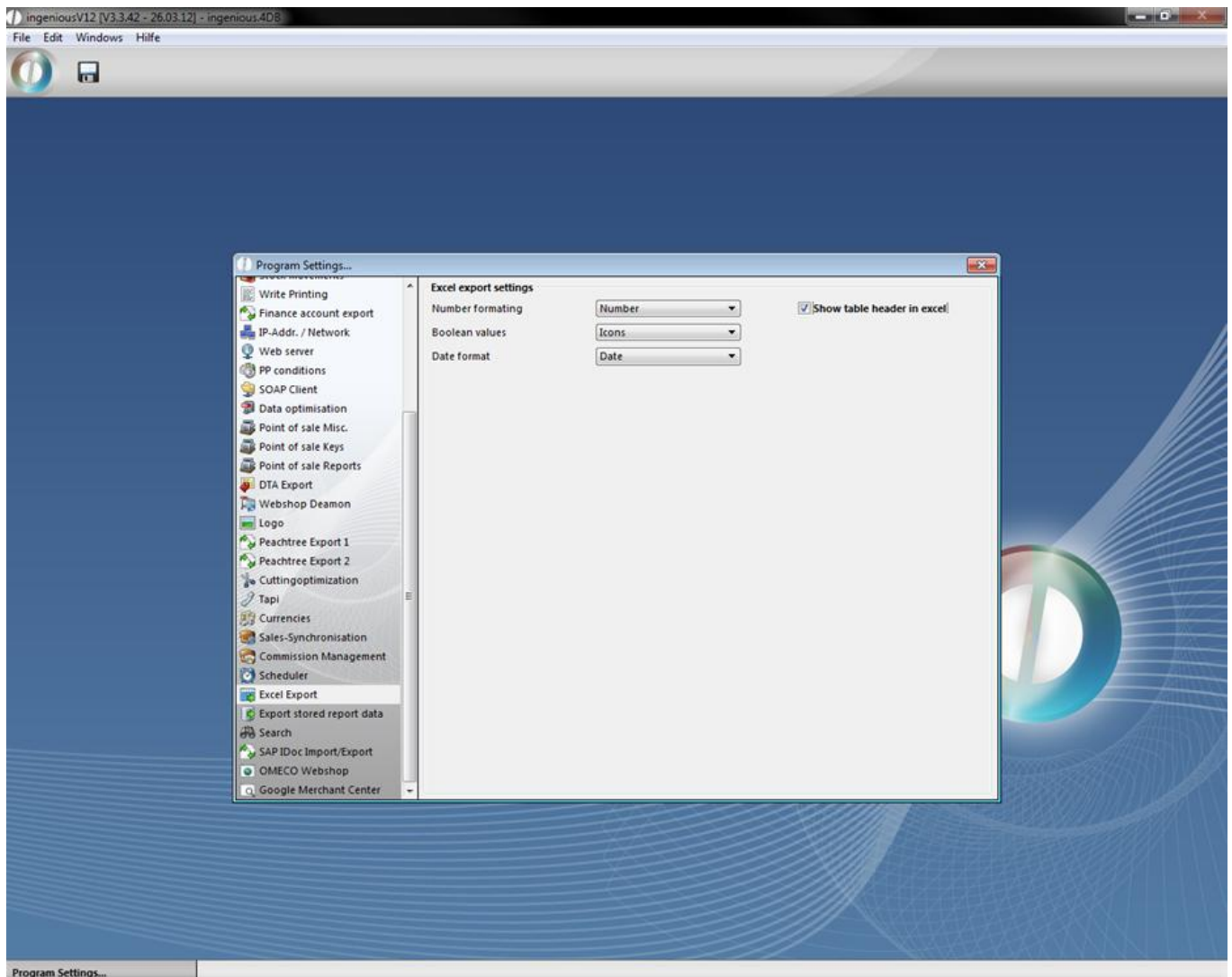


The screenshot displays the 'Workflow List view' in the ingenious.V12 application. The interface includes a sidebar with various filters and a main table of project data. The table columns are: Project document, DocNo., Date, Project, Customer, Telephone, Gross \$, Open \$, and a series of checkboxes for 'Pai fin', 'arc R1', 'R2', and 'R3'. The table lists numerous project entries, including order confirmations, invoices, and combined invoices, with details such as dates, project names, and monetary values.

Example list view

In the program settings in the category "Excel export" you can define how the data should be exported to excel. When you check the field "Show table header in excel", the column names like document number, commission, etc. will be exported too. Additionally you can define the output format of numbers, Boolean values and dates.

- Number formatting: Number or text
- Boolean values: Icons, TRUE/FALSE or 0/1
- Date format: Date or text



In addition to the default list views you can also export customized ones. In the following example a individual list was exported.

ingenious.V12 [V3.3.42 - 26.03.12] - ingenious.ADB

File Edit Projects Print Print preview Windows Hilfe

Workflow List view [1 / 18 / 67]

Project filter

- Quotations [Off]
- Orders [Off]
- Delivery notes [Off]
- Invoices [On]
- Credit notes [Off]

Status filter

- Paid inv. [On]
- Archiv. documents [On]

View filter

- From: 3/31/2006
- Till: 7/31/2012
- Customer: [No filter]
- Status: [No filter]
- Client: [No filter]
- View: [2 Projects]


Trip

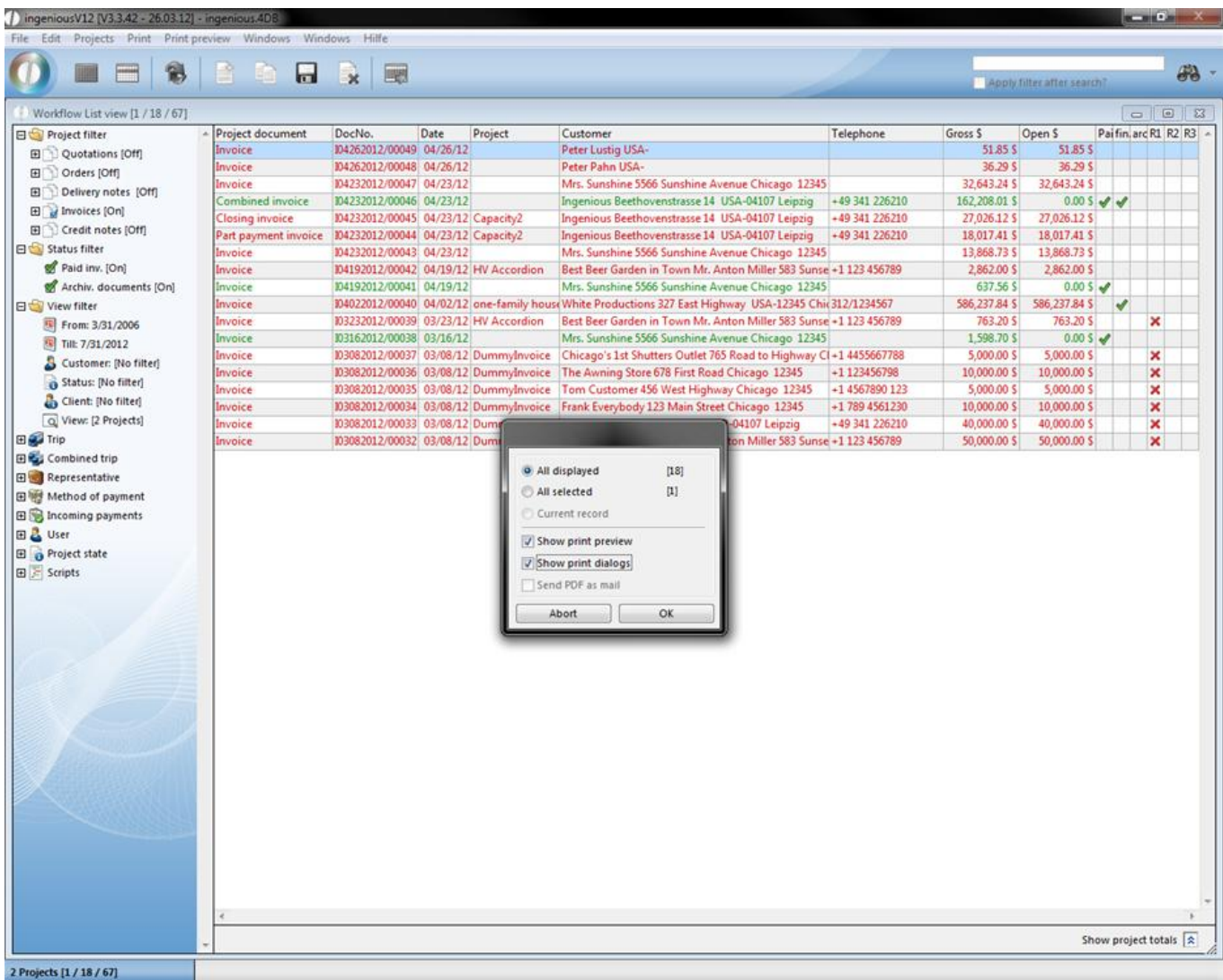
- Combined trip
- Representative
- Method of payment
- Incoming payments
- User
- Project state
- Scripts

Project document	DocNo.	Date	Project	Customer	Telephone	Gross \$	Open \$	Paifin	arc	R1	R2	R3
Invoice	04262012/00049	04/26/12		Peter Lustig USA-		51.85 \$	51.85 \$					
Invoice	04262012/00048	04/26/12		Peter Pahn USA-		36.29 \$	36.29 \$					
Invoice	04232012/00047	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		32,643.24 \$	32,643.24 \$					
Combined invoice	04232012/00046	04/23/12		Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	162,208.01 \$	0.00 \$	✓	✓			
Closing invoice	04232012/00045	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	27,026.12 \$	27,026.12 \$					
Part payment invoice	04232012/00044	04/23/12	Capacity2	Ingenious Beethovenstrasse 14 USA-04107 Leipzig	+49 341 226210	18,017.41 \$	18,017.41 \$					
Invoice	04232012/00043	04/23/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		13,868.73 \$	13,868.73 \$					
Invoice	04192012/00042	04/19/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	2,862.00 \$	2,862.00 \$					
Invoice	04192012/00041	04/19/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		637.56 \$	0.00 \$	✓				
Invoice	04022012/00040	04/02/12	one-family house	White Productions 327 East Highway USA-12345 Chi	312/1234567	586,237.84 \$	586,237.84 \$					
Invoice	03232012/00039	03/23/12	HV Accordion	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	763.20 \$	763.20 \$					✗
Invoice	03162012/00038	03/16/12		Mrs. Sunshine 5566 Sunshine Avenue Chicago 12345		1,598.70 \$	0.00 \$	✓				
Invoice	03082012/00037	03/08/12	DummyInvoice	Chicago's 1st Shutters Outlet 765 Road to Highway Cl	+1 4455667788	5,000.00 \$	5,000.00 \$					✗
Invoice	03082012/00036	03/08/12	DummyInvoice	The Awning Store 678 First Road Chicago 12345	+1 123456798	10,000.00 \$	10,000.00 \$					✗
Invoice	03082012/00035	03/08/12	DummyInvoice	Tom Customer 456 West Highway Chicago 12345	+1 4567890 123	5,000.00 \$	5,000.00 \$					✗
Invoice	03082012/00034	03/08/12	DummyInvoice	Frank Everybody 123 Main Street Chicago 12345	+1 789 4561230	10,000.00 \$	10,000.00 \$					✗
Invoice	03082012/00033	03/08/12	DummyInvoice	Ingenious Beethovenstrasse 14 D-04107 Leipzig	+49 341 226210	40,000.00 \$	40,000.00 \$					✗
Invoice	03082012/00032	03/08/12	DummyInvoice	Best Beer Garden in Town Mr. Anton Miller 583 Sunse	+1 123 456789	50,000.00 \$	50,000.00 \$					✗

Show project totals

2 Projects [1 / 18 / 67]

When you click on the excel export button , the default print dialog of ingenious.V12 will open up, where you can select the number of records that you want to be printed.



After confirming the print window the default save dialog of windows will open up.
When you save the file, excel will open up.

	A	B	C	D	E	F	G	H	I
	Projektdokument	Dokumentnr.	Datum	Kommission	Kunde	Brutto €	Offen €		abg
1	Projektdokument	R200907/00012	01.07.09	Test_Umsatzstatistik_6	Firma Klaus Friedrich Seestraße 75 D-01425 Testort	257,00	257,00		
2	Rechnung	R200906/00006	11.06.09	Test_Provision_2	Siegfried Redlich Nürberger Straße 34 D-01424 Musterstadt	16.077,14	16.077,14		
3	Rechnung	R200906/00004	11.06.09	Test_Provision	Frau Niemeyer Allee der Kosmonauten 35 D-74436 Dackhausen	75,01	75,01		
4	Rechnung	R200906/00005	10.06.09	Test_Provision_1	Siegfried Redlich Nürberger Straße 34 D-01424 Musterstadt	7.406,32	7.406,32		
5	Rechnung	R200907/00007	03.05.09	Test_Umsatzstatistik_1	Frau Niemeyer Allee der Kosmonauten 35 D-74436 Dackhausen	738,95	738,95		
6	Rechnung	R200904/00001	21.04.09	Test_FIBU_1	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	1.046,72	1.046,72		
7	Rechnung	R200904/00002	20.04.09	Test_FIBU_2	Firma Klaus Friedrich Seestraße 75 D-01425 Testort	1.095,18	1.095,18		
8	Auftragsbestätigung	200904/00003	20.04.09	Test_Kapazitätsplanung	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	129.446,42			
9	Auftragsbestätigung	200904/00002	20.04.09	Test_BESTELL	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	337,88			
10	Rechnung	R200904/00003	18.04.09	Test_FIBU_3	Frau Niemeyer Allee der Kosmonauten 35 D-74436 Dackhausen	2.727,48	2.727,48		
11	Rechnung	R200907/00010	22.03.09	Test_Umsatzstatistik_4	Siegfried Redlich Nürberger Straße 34 D-01424 Musterstadt	595,00	595,00		
12	Rechnung	R200907/00008	19.03.09	Test_Umsatzstatistik_2	Frau Niemeyer Allee der Kosmonauten 35 D-74436 Dackhausen	1.320,90	1.320,90		
13	Rechnung	R200907/00009	20.02.09	Test_Umsatzstatistik_3	Siegfried Redlich Nürberger Straße 34 D-01424 Musterstadt	344,11	344,11		
14	Rechnung	R200907/00011	15.01.09	Test_Umsatzstatistik_5	Firma Klaus Friedrich Seestraße 75 D-01425 Testort	119,00	119,00		
15	Rechnung	R200811/00004	28.11.08	Test_Projektzusammenfassung_1	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	7.811,18	7.811,18		
16	Auftragsbestätigung	200811/00001	28.11.08	Test_Aufmaß	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	348,90			
17	Rechnung	R200811/00005	26.11.08	Test_Projektzusammenfassung_2	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	1.061,64	1.061,64		
18	Auftragsbestätigung	200811/00002	26.11.08	Test_Projektzusammenfassung_3	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	1.261,64			
19	Auftragsbestätigung	200810/00001	14.10.08	Test_Positionen	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	3.325,16			
20	Rechnung	R200907/00015		Test_Adressbildung	Olsen GmbH Dr. Egon Olsen Kopenhagener Straße 34 D-12456 Rostock Sudstadt	0,00	0,00		
21	Lieferschein	110609/00001		Test_FIBU_1	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	1.046,72			
22	Rechnung	R200811/00007			Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	9.072,80	9.072,80		
23	Rechnung	R200811/00006			Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	9.072,80	9.072,80		
24	Abschlagsrechnung	R200811/00003		Aufmaß_Test	Egon Olsen Kopenhagener Straße 34 D-12456 Rostock	17,85	17,85		
25	Abschlagsrechnung	R200810/00002		TEST_Zuschnittsoptimierung	Firma Klaus Friedrich Seestraße 75 D-01425 Testort	132,26	132,26		

9.7 4D server administration

The ingenious.V12 software is based on the 4D database engine.

Important instructions of server administration and backup can be found at the 4D documentation center:

<http://doc.4d.com/4Dv12/4D-Server/12/4D-Server-Reference.100-67413.en.html>

10 Placeholders Formulas

10.1 Overview of system components

Component in German	Component in Englisch	Description
MahnPosLine		
PosAbschlag		Items of the partial payment document
PosAbsBetreff		Subject of the partial payment document
PosH		
PosP		
PosPA		
PosPMaße		
PosPO		
PosR		
PosS		
PosSDBetreff		
PosSDH		Subheader of the combined document
PosSDS		Subtotal of the combined document
PosT		
PosNr		
PosSchlussBetreff		Subject of the closing invoice
RabattSummenblock	RebateTotalSection	Total section inclusive rebate
Summenblock	TotalSection	SP total section = Net, sales tax and gross
Summenblock_BE	TotalSection_PU	PP total section = Net, sales tax and gross at purchase

10.2 Overview of placeholders

Placeholder in German	Placeholder in English	Description
In the "Contacts" Module		
{Aktionstext}	{TextBoundToDocState}	Project status-dependent text that is attached to the contact
{Briefanrede}	{Salutation}	Saved customer salutation
{KdAnschrift}	{CustomerAddress}	Saved customer address

{KdAnschriftZ1...Z10}	{CustomerAddressL1...L10}	Saved customer address in 10 lines (for the optimized display of the multi-line data field in Write)
{KdFax}	{CustomerFax}	Customer fax number
{KdFaxZ1...Z10}	{CustomerFaxL1...L10}	Saved customer fax number in 10 lines (for the optimized display of the multi-line data field in Write)
{KdTel}	{CustomerPhone}	Customer phone number
{KdTelZ1...10}	{CustomerPhoneL1...L10}	Customer phone number in 10 lines (for the optimized display of the multi-line data field in Write)
{KdUstID}	{CusomSalesTaxID}	Customer sales tax ID
{KundenNr}	{CustomerNo}	Customer number
{Mahnung1}	{Reminder1}	Time period according to the payment due date
{Mahnung2}	{Reminder2}	Time period after the first reminder
{Mahnung3}	{Reminder3}	Time period after the second reminder
{Vertreter}	{Representative}	Representative / Project contact
{Vertreternummer}	{RepresentativeNo}	Representative number
In the workflow modules		
{@Summenblock@}	{@TotalSection@}	Display of item numbers; @ must be suitably replaced; z. B.: Z1...Z10
{A3Briefanrede}	{A3Salutation}	Salutation address 3
{A3Fax}	{A3Fax}	Fax address 3
{A3Tel}	{A3Phone}	Phone address 3
{A4Briefanrede}	{A4Salutation}	Salutation address 4
{A4Fax}	{A4Fax}	Fax address 4
{A4Tel}	{A4Phone}	Phone address 4
{AbDatum}	{OrDate}	Order confirmation date
{AbNr}	{OrNo}	Order confirmation number
{Adresse3}	{Address3}	Address 3
{Adresse4}	{Address4}	Address 4

{AgDatum}	{QuDate}	Quote date
{AgNr}	{QuNo}	Quote number
{Betreff}	{Subject}	Project subject heading
{BruttoEUR}	{GrossTotal}	Total sum of all items without decimal places
{Dokumentennr}	{DocumentNo}	Document description with document number
{Fußtext}	{FooterText}	Footer text of the projects
{GesamtEUR}		Total sum of all items
{GesamtEuro-Skonto}	{GrossTotal-Rebate}	Gross total less rebate
{GuDatum}	{CrDate}	Credit date
{GuNr}	{CrNo}	Credit document number
{KommisionsNr}	{Project}	Project number
{KopfText}	{HeaderText}	Header from the items
{LfDatum}	{DeDate}	Delivery notice date
{LfNr}	{DeNo}	Delivery notice document number
{MwSt%}	{SalesTax%}	VAT of all projects in percent (half + total)
{MwStBetrag}	{SalesTax}	Total VAT of all projects (half + total)
{MwStBetragEUR}	{SalesTaxTotal}	VAT sum of all projects (half + total)
{MwStEUR}	{SalesTax}	Total VAT of all projects (half + total)
{MwStHalb%}	{2ndSalesTax%}	Half of the VAT in percent
{MwStHalbBetragEUR}	{2ndSalesTaxTotal}	Half of the VAT of a project as the sum
{MwStHalbEUR}	{2ndSalesTax}	Half of the VAT of a item as the sum
{MwStVoll%}	{1stSalesTax%}	Complete VAT in percent
{MwStVollBetragEUR}	{1stSalesTaxTotal}	Complete VAT of a project as the sum
{MwStVollEUR}	{1stSalesTax}	Complete VAT of a project as the sum
{NettozielDatum}	{NetPaymentDate}	Payment up to
{NettozielTage}	{NetPaymentDays}	Payment period in days

{Objektanschrift}	{DeliveryAddress}	Delivery address
{ObjektanschriftZ1...Z10}	{DeliveryAddressL1...L10}	Set delivery address in the project on 10 lines (for the optimized display of the multi-line data field in Write)
{ObjektBriefanrede}	{DelAddrSalutation}	Delivery address salutation
{ObjektFax}	{DelAddrFax}	Delivery address fax
{ObjektFaxZ1...Z10}	{DelAddrFaxL1...L10}	Fax delivery address (for the optimized display of the multi-line data field in Write)
{ObjektTel}	{DelAddrPhone}	Delivery address phone
{ObjektTelZ1...Z10}	{DelAddrPhoneL1...L10}	Delivery address phone (for the optimized display of the multi-line data field in Write)
{PosAbmessungen}	{ItemMeasurement}	Item measurement
{PosArtMatchcode}	{ItemMatchcode}	Item Matchcode
{PosArtNr}	{ArtNo}	Article number
{PosBestNr}	{ArtOrderNo}	Article order number
{PosEEK}	{ItemPPP}	Item single purchase price
{PosEHP}	{ItemUSP}	Item flat price
{PosEHPBrutto}	{ItemLUSP}	Item flat price without a special price (List price)
{PosEHPEK}	{ItemUPP}	Item uniform purchase price
{PosEinheit}	{ItemUnit}	Item unit
{PosEP}	{ItemPSP}	Item price per piece including rebate
{PosEPBrutto}	{ItemPLSP}	Gross project price without rebate (List price)
{PosEPMwSt}	{ItemPSPG}	Parts price including VAT
{PosGEK}	{ItemPP}	Total item purchase price
{PosGewicht}	{ItemWeight}	Item weight
{PosGP}	{ItemNet}	Total item net price - including rebate
{PosGPBrutto}	{ItemLNet}	Total item price with rebate not yet included
{PosGP-Montage}	{ItemNet-Montage}	Total price of project labor
{PosGPMwSt}	{ItemGross}	Total item price with VAT

{PosGPRabatt}	Rebate % with PosR, with PosP special price in %, if special price in % (provide extra percentage sign)	
{PosGPRabatt%}	{ItemRebate%}	Rebate % with PosR, with PosP special price in %, if special price in %
{PosGPRabatt}	{ItemRebate}	Net rebate sum with rebate item PosR and with PosP sum of the special price discounts
{PosGPRabattBrutto}	{ItemGRebate}	Gross item rebate price
{Position}	{Item}	Individual items
{PosKommissionsNr}	{ItemProjekt}	Item project
{PosKurztext}	{ItemSimpleTextOrig}	Item simple text
{PosLangtext}	{ItemSimpleText}	Item long text
{PosMengeSum}	{ItemAmount}	Item amount
{PosMontageEUR}	{ItemMontage}	Item installation price
{PosNr}	{ItemNo}	Item number
{PosText}	{ItemText}	Total item text
{PosText1L}	{ItemText1L }	Item text line
{PosText2ff}	{ItemText2ff}	More item text lines
{PosWährung}	{ItemCurrency}	Item currency
{Preisbindung}	{PriceFixingTill}	Binding date of the controlled price
{PrintPrjSum}	---	Sum evaluation of several items all at once; for this an article that has the article description PrintPrjSum must be placed with the desired calculation format
{PrintVar}	---	Variables that are specified in the article parts list and inserted as text modules into the desired document i.e.: {PrintVar (_Color)}. For formatting, you simply integrate it in PosP
{RabattEUR}	{RebateTotal}	Rebate total
{RabattSummenblock}	{RebateTotalSection}	Total section including rebate
{Registernummer}	{FirmregisterNo}	Company registration number

{RgDatum}	{InDate}	Invoice date
{RgNr}	{InNo}	Invoice document number
{SerNr}	{SerNo}	Article serial number
{Skonto}	{Rebate}	Percentage rate of the discount
{SkontoBetrag}	{RebateTotal}	Calculated discount amount
{SkontozielDatum}	{RebateDate}	Discount target date
{SkontozielTage}	{RebateDays}	Discount time period in days
{SummeEK}	{PPTotal}	Item purchase price total
{SummeEUR}	{NetTotal}	Item net total
{Summenblock_BE}	{TotalSection_PU}	Purchase Order total section = Net, VAT and gross when ordering
{Summenblock}	{TotalSection}	SP total section = Net, VAT and gross when ordering
{SummePositionenEUR}	{NetTotal}	Item net total
{Währung}	{Currency}	Currency
{Währungskürzel}	{CurrencyAbbr}	Currency abbreviation
{ZB}	{TermsOfPayment}	Terms of payment
In the administration tool "Program settings"		
{GE_Adresse}	{PS_Address}	Global settings/General/Address
{GE_Adresszeile}	{PS_AddressLine}	Global settings/General/Postal address line
{GE_DatumPräfix}	{PS_DatePrefix}	Global settings/General/Date prefix
{GE_EMail}	{PS_Email}	Global settings/General/E-Mail
{GE_Fax}	{PS_Fax}	Global settings/General/Fax
{GE_Logo_Large}	{GE_Logo_Large}	Integrate the large logo into the measurement sheet
{GE_Logo_Small}	{GE_Logo_Small}	Integrate the small logo into the measurement sheet
{GE_StNr}	{PS_TaxNo}	Global settings/General/Tax number
{GE_Telefon}	{PS_Phone}	Global settings/General/Phone
{GE_Ust-IdNr}	{PS_SalesTaxID}	Global settings/General/Sales Tax ID
{OrtDatum}	{CityDate}	City and date

In the administration tool "User administration"		
{Sachbearbeiter}	{ContactPerson}	Name of the administrator
In the administration tool "Rental article administration"		
{PrintMA_Beschreibung(param1;param2;param3)}	---	Printing description rental article with the following parameters: {PrintMA_Description ("Article Matchcode"; "Descriptive text"; "Line break")}, i.e.: {Print_MA_Description ("Video1"; "loaned videos"; "CR")}
{PrintMA_Bestand(param1; param2)}	---	Printing of the current customer stock of the rental article: {PrintMA_Stock ("Article Matchcode"; "Line spacing")}, i.e.: {PrintMA_Stock ("Video1"; "CR")}

10.3 Formulary checklists

Name	Description:	Example
Commands:		
Visible	Displays fields with fulfilled conditions	=visible field name
Set	Changed with full condition values of other fields.	=set field name=value
Error reports:		
OKend	If an error message generates their condition, it is reviewed only by clicking on the "OK" button	=OKend "Error text"
Msg	Generates an error message of which the condition is reviewed after each change of the parts list.	=Msg "Error text"
Formatting:		
_Height	Determines the height of the measurement window in pixels. 400 = 400 pixels high	=_Height 400
_Width	Determines the width of the measurement window in pixels 200 = 200 pixels wide	=_Width 200
_Split	If the column relation of the measurement window. 13 7 = column "Description" =130 pixels / Column "Value" =70 pixels Be careful! When the defined width of "Split" is greater than from "_Width", the width of the	=_Split 13 7

	window ("_Width") is adapted.	
Forecolor	Changes the font color of ta field; Colors: Rot=red, Grün=green, Gelb=yellow, Blau=blue, Weis=white, Schwarz=black	Fieldname; forecolor=blue
Backcolor	Changes the background color of the field; Colors: Rot=red, Grün=green, Gelb=yellow, Blau=blue, Weis=white, etc.	Fieldname; backcolor=red
Operators:		
=	Tests the values for equality	A=B
<>	Tests the values for inequality	A<>B
()	Pulls the calculation in parenthesis out and/or develops an expression (TRUE or FALSE) out of the content in parenthesis.	(A+B)*C
and	With this operator, the parenthesis form in an expression in each case. An expression is either TRUE or FALSE. The condition is only fulfilled if both expressions are true.	(A+B=C) and (D=C)
or	With this operator the parenthesis form an expression in each case. An expression is either TRUE or FALSE. The condition is fulfilled if an expression is precisely TRUE.	(A+B=D) or (A+B=C)
not	With this operator the parenthesis forms an expression. An expression is either TRUE or FALSE. The condition is fulfilled if the expression is wrong.	not (A=B)

10.4 Formulary part lists

Name	Description:	Example
Functions:		
tab	Is an IF THEN Function (Case command). Example: IF A THEN X, IF B THEN Y Otherwise Z	tab(Fieldname)(A;B;X;Y;Z)
frmt	Assigns a certain formatting to the cell. If 13 is listed in the field (fieldname) 13.00 € are provided	frmt(Fieldname;"###;00 €")
mid	11	mid("ABCDE";2)="AB" mid("ABCDE";2;3)="BCD"
len	Determines the length of a character string.	len(jum.Fieldname)=5 len("")=0
goto	Is a goto statement. It allows the creation of loops.	goto(Variablename)

	Information on the target occurs through variable names of the target line.	
exit	Immediately cancels a calculation	exit
Sin	Calculates the sinus of a number	sin(45)=0. 85
Cos	Calculates the consine of a number	cos(45)=0.52
Tan	Calculates the tangent of a number	tan(45)=1.61
Atn	Calculates the arcus tangent of a number	atn(45)=1.54
Exp	Calculates the sum with any exponent on the basis of 2,71828	exp(4)=54.59
Log	Returns the natural logarithm of a number	log(45)=3.80
Sqr	Pulls the root of a number	sqr(45)=6.70
Abs	Gives the number as an absolute number (=Positive) back	abs(-45)=45
abort	Cancels the calculation and provides an error report .	abort("Entry is not plausible")
in	Function tested, if a variable lies in a value area	10 IN [25 .. 35] = False
Operators:		
+	The "+"-Operator adds two values	10+3=13
-	The "-"-Operator subtracts two values	10-3=7
*	The "*"-Operator multiplies two values	10*3=30
/	The "/"-Operator divides two values	10/3=3.33
\	the "\"-Operator divides two values in integers	10\3=3
()	The content of "()"-Operators is calculated first	(10+3)*10=130
{}	The content of "{}"-Operators are shown as a value	{jum.m}
%	The "%" Operator delivers the rest of an integer division	10%3=1
Platzhalter:		
jum.x	Access to the 1st measurement	jum.x
jum.y	Access to the 2nd measurement	jum.y
jum.z	Access to the 3rd measurement	jum.z
jum.m	Access to the quantity	jum.m
jum.vk	Access to the SP of the parts list; Careful item-dependent!	jum.vk

jum.ek

Access to teh PP; Careful item-dependent!

jum.ek

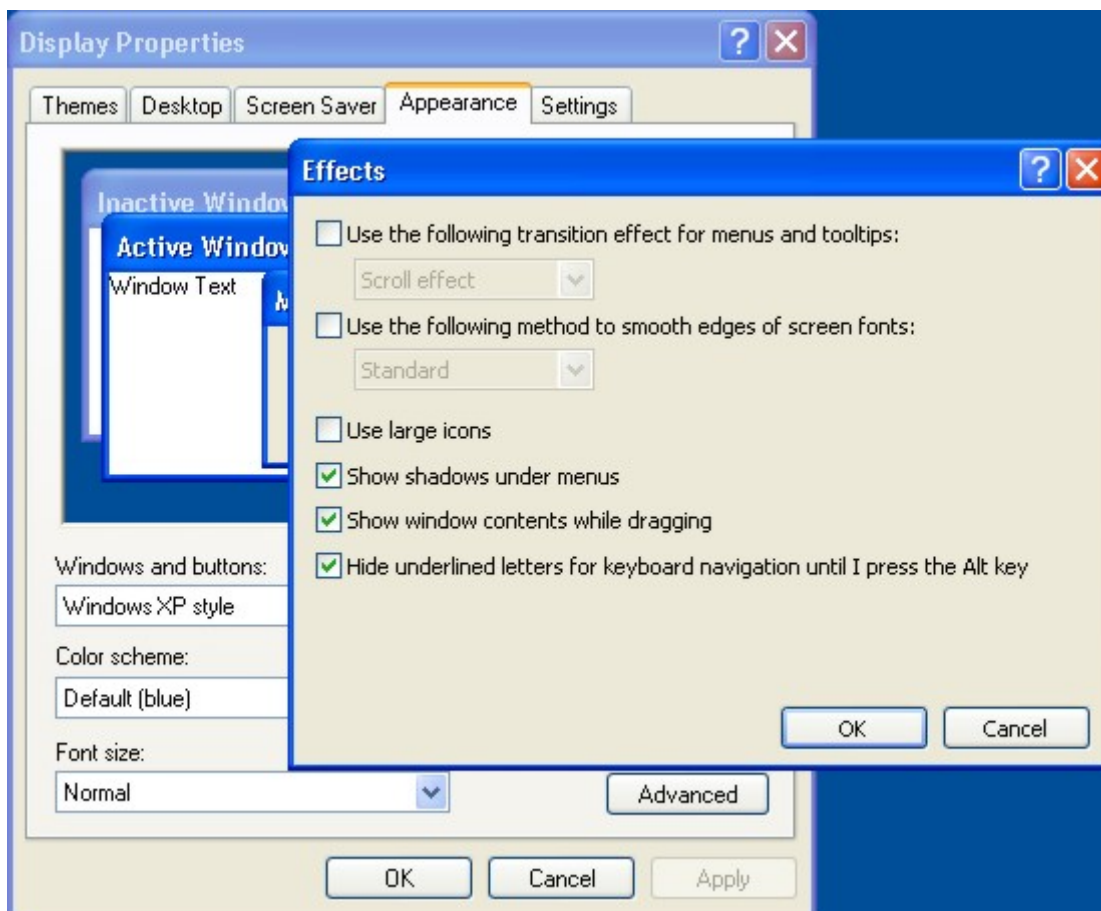
10.5 Keyboard layouts

General

Alt Key + underlined letter in the menu title opens the menu and/or the main point (instead of Alt F10 is also possible)

Note:

You can set up the defaults so that the letters are shown as underlined in all menus under Windows with Start/Settings/System control/Display in the "Representation" tab with the "Effects" button, while you simply remove the checkmarks from the option "Hide underlined letters for keyboard navigation".



Esc	Switch in the file selection and/or selection area
F1	Online help
F4	Opens the project time entry
⇧	Tab; Switch to the next field
↵	Enter; Confirmation; if necessary. change to a new line
↓ ↑	Direction keys; Scrolling
← →	Open folder/Close
Ctrl + ↓ ↑	Switch the headings in the detail view
Ctrl + F4	Close the window
Ctrl + F6	Switch between windows (Ctrl + ⇧ also works)

↑ + F2 Field editor

Space bar Display of the current window if the cursor transforms in the window superimpose icon

In the list views

Ctrl + A Highlight everything (instead of Ctrl Alt Gr is also always possible)

Ctrl + B Opens the detail view of a list field

Ctrl + C Copy

Ctrl + F Search (values, formulas, complete word, part of a word)

Ctrl + M Menu bar in the list view

Ctrl + P Print

Ctrl + S Export document

Ctrl + V Enter

Ctrl + X Cut

Ctrl + Z Reverse

Pos1 Shows start of list

End Shows end of list

Picture ↑ Moves picture slide bar to the top

Picture ↓ Moves picture slide bar to the bottom

In the project detail view in the "Items" column

Ctrl + A New article item

Ctrl + D Delete highlighted item

Ctrl + H New heading

Ctrl + L New current sum

Ctrl + M New multi-item

Ctrl + R New discount item

Ctrl + T New text item

Ctrl + Z New subtotal

Ctrl + 1 New direct invoicing parts item

Ctrl + 2 New direct invoicing m-item

Ctrl + 3 New direct invoicing qm-item

In word processing

Ctrl + N Open new file

Ctrl + O Open existing file

Ctrl + S Save

Ctrl + H Create print preview

Ctrl + P Print

Ctrl + E Display file in complete window

Ctrl + Z Recall editing step

Ctrl + Y	Repeat editing step
Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + A	Highlight all
Ctrl + F	Search
Ctrl + G	Find next
Ctrl + R	Replace
Ctrl + T	Replace next
Ctrl + J	Column break
Ctrl + L	Page break
Ctrl + B	Bold
Ctrl + I	Cursive
Ctrl + U	Underline (simple)
Ctrl + M	Show / hide menu bar
Ctrl + K	Calculate reference now
F7	Spell check

Ctrl + ⇧ + W	Soft separation
Ctrl + ⇧ + C	Copy ruler
Ctrl + ⇧ + V	Paste ruler
Ctrl + ⇧ + L	Paragraph left justified
Ctrl + ⇧ + R	Paragraph right justified
Ctrl + ⇧ + J	Justified
Ctrl + ⇧ + F	Opens format window for the sign
Ctrl + ⇧ + P	Opens format window for the paragraph
Ctrl + ⇧ + T	Opens format window for the tab
Ctrl + ⇧ + B	Opens format window for the border
Ctrl + ⇧ + S	Opens format window for the style sheet

10.6 Maintenance scripts

Different maintenance scripts are available, e.g. for getting a structured overview of different configurations. Maintenance scripts are to be executed in the free data modification module

Export of all scripts to a text file

Tool_SaveScripts

Export of an overview of all text templates to a text file

Tool_SaveTemplates

Export of an overview of all print reports to a text file

Tool_SaveReports

Export of an overview of all user rights to a text file

Tool_SaveUserRights ("FORMULAR")

11 Updates

11.1 Annual update 2015 -> 2016

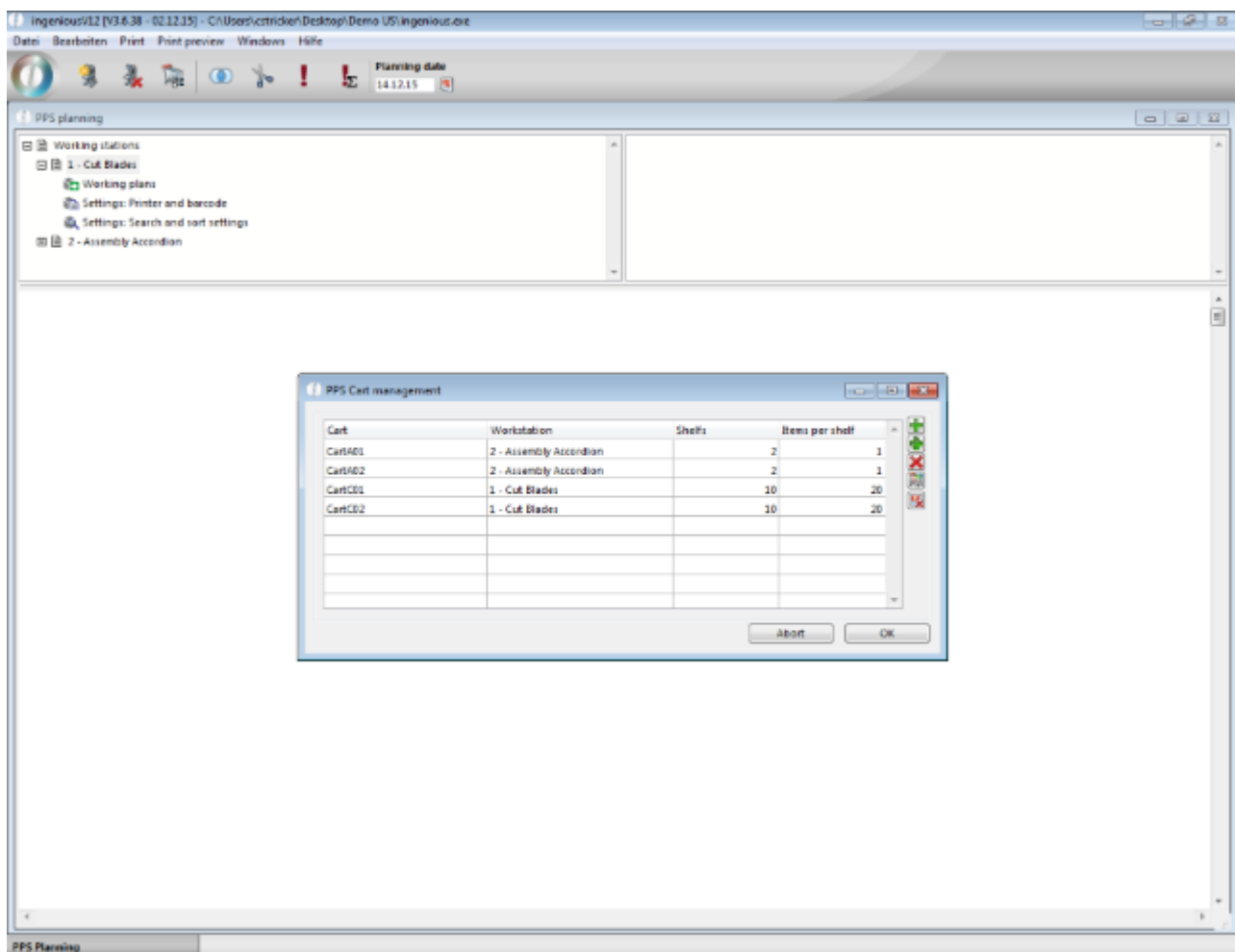
11.1.1 New features

11.1.1.1 PPS cart administration






For an ordered and bunched sorting of product parts and for a better traceability in the production carts and their shelves can be managed in the PPS.

With that workers can be instructed to put the parts into a preset shelf of a preset cart. In that way the worker of the following station also will know, where the needed part is to be found.

In the production planning the cart administration can be opened with button of the icon bar. All carts will be named and the number of the available shelves has to be entered. Additionally needs to be configured, how many of the parts will fit into one shelf.

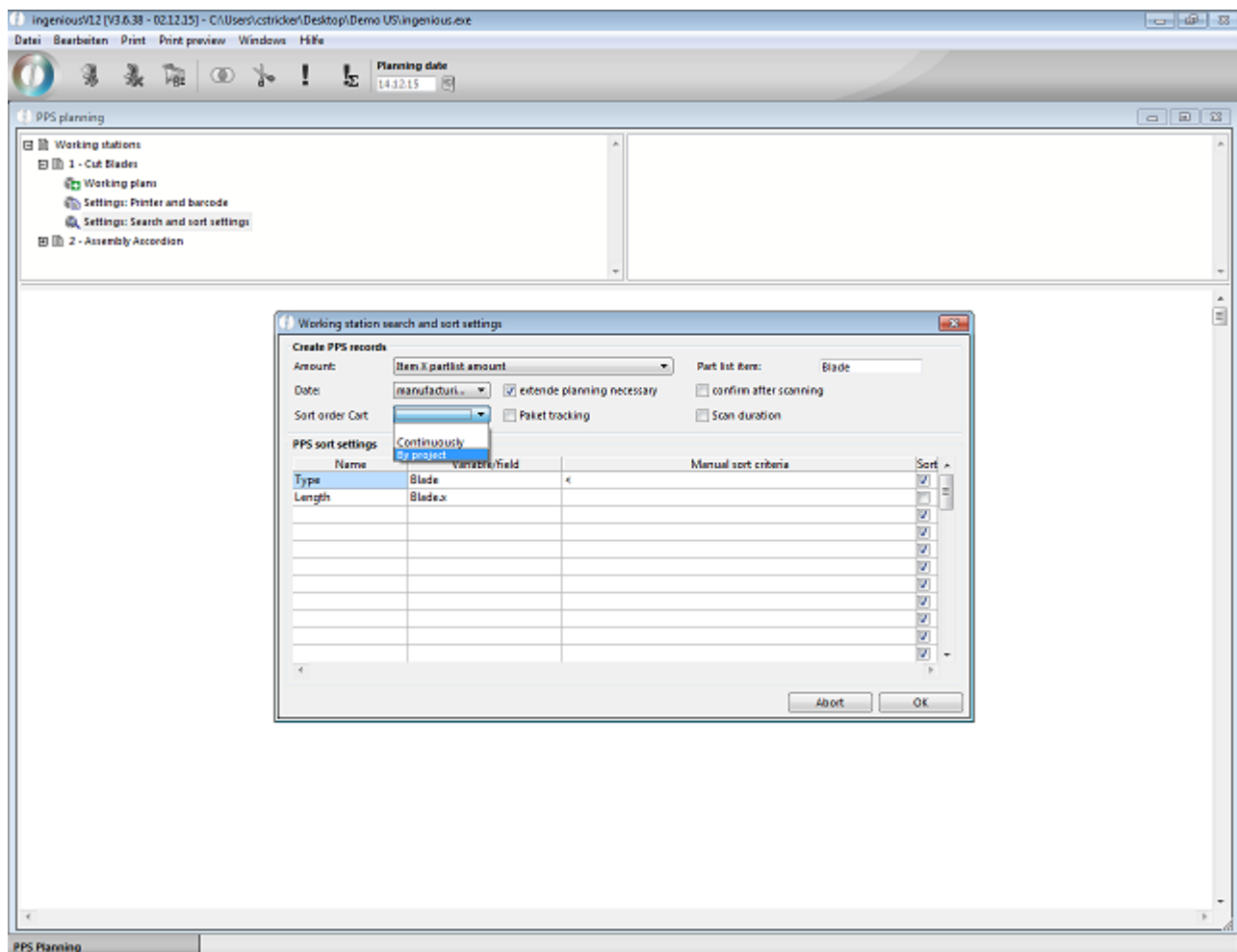


In the cart administration the following features are provided:

	Add a new cart
	Copy an existing cart configuration
	Delete the selected cart
	Show the actual filling level of the cart
	Resets the actual cart planning for all carts (Deletes the presetted shelf allocation for not yet filled cart shelves)

For each work station can be defined, in which order the cart shelves will be filled.

Continuously	The cart shelves will be filled continuously with the parts of any position of the project
by project	The cart shelves will be filled by project and position. This means for cutting optimized parts that all blades from position 1 from project A will be put into the first shelf and all blades from position 2 from project A to the second shelf.



To display the preset cart at the work station, the PPS templates has to be adapted.

Preset of the cart

```
<select id="PPSCart" name="PPSCart"
onchange="javascript:document.Overview.submit();">
<!--4DLOOP aPPSWeb_Cart-->
<option<!--4DIF (vPPSWeb_lastCart=aPPSWeb_Cart{aPPSWeb_Cart})--> selected
<!--4DENDIF-->>
<!--4DVAR aPPSWeb_Cart{aPPSWeb_Cart}-->
</option>
<!--4DENDLOOP-->
</select>
```

Preset of the cart shelf

```
<select id="PPSCartShelf" name="PPSCartShelf">
<!--4DLOOP aPPSWeb_CartShelf-->
<option<!--4DIF (vPPSWeb_lastCartShelf=aPPSWeb_CartShelf{aPPSWeb_CartShelf})-->
selected<!--4DENDIF-->>
<!--4DVAR aPPSWeb_CartShelf{aPPSWeb_CartShelf}-->
</option>
<!--4DENDLOOP-->
</select>
```

Button for the confirmation of the position

```
<button type="submit" value="Select" name="BTN_Scan_<!--4DVAR
aPPSWeb_ID{aPPSWeb_Status}-->" class="btnStation"<!--4DIF ((aPPSWeb_Status=1) |
(aPPSWeb_Status{aPPSWeb_Status-1}=300))--> id="PPSNextRecord"<!--4DENDIF-->>

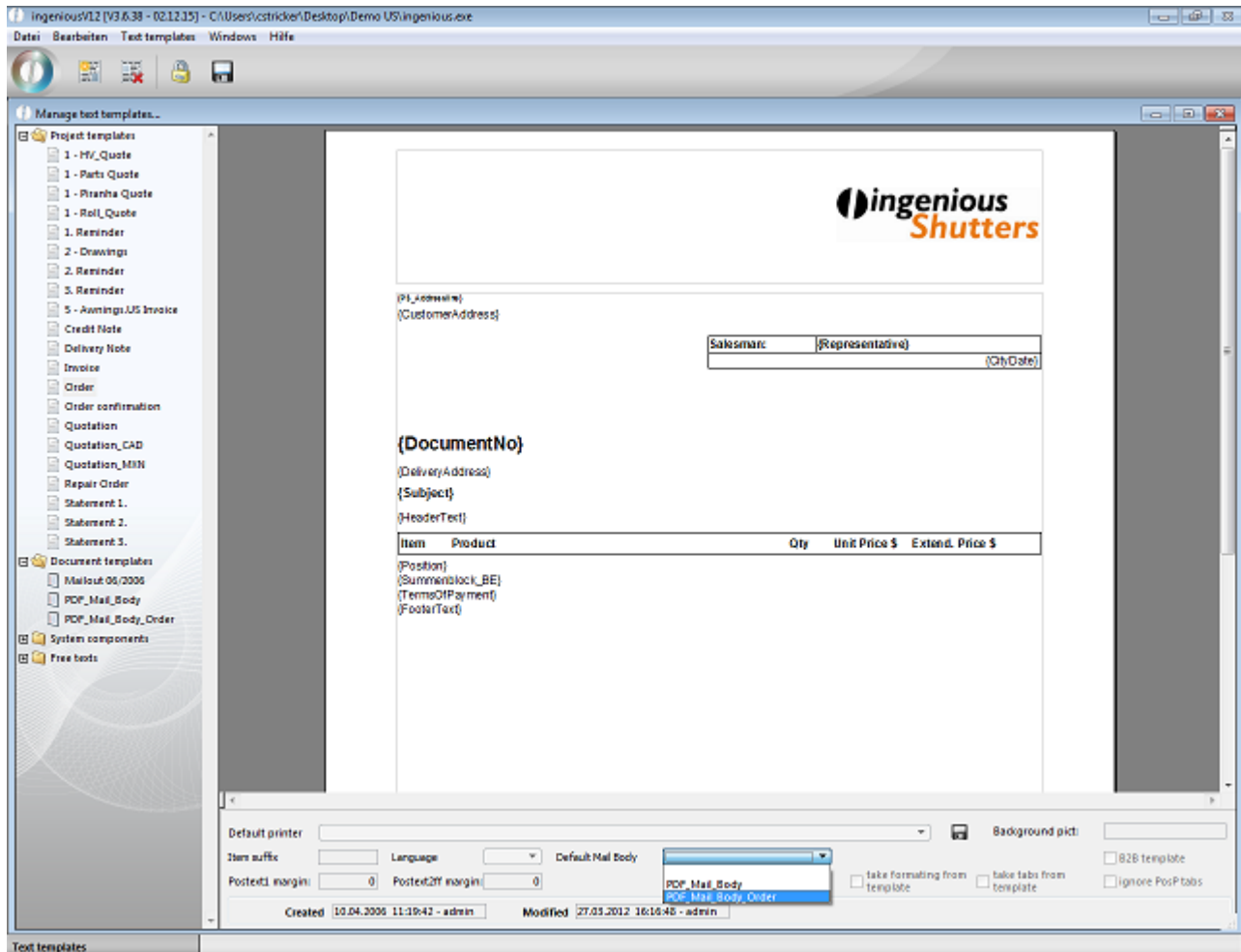
</button>
```

11.1.1.2 PPS time log and rest times

11.1.1.3 Individual mail body for project templates

Out of the print preview of a project document the document can directly be sent to the customer by email. The document is written into a pdf and will be attached to the email. The content of the email can be empty or will be filled depending on the divers configurations.

Beside of the hitherto possibilities of a general mail body from the global settings and the PDF_Mail_Body from the document templates (general or multi lingual) now a fourth option is available to insert different mail bodies for each project template.



Rules:

1. When there is no specific mail body selected for the project template the text from document "PDF_Mail_Body_[Language]" is used.
2. If no mail body with the selected language exists or no language was selected for the document, the text will be used from document template "PDF_Mail_Body".
3. If no document template "PDF_Mail_Body" exists, the text will be used from the global program settings.

11.1.1.4 Receiving emails at contact

This feature offers to show received and sent emails of a contact in the ingenious.V12 software.

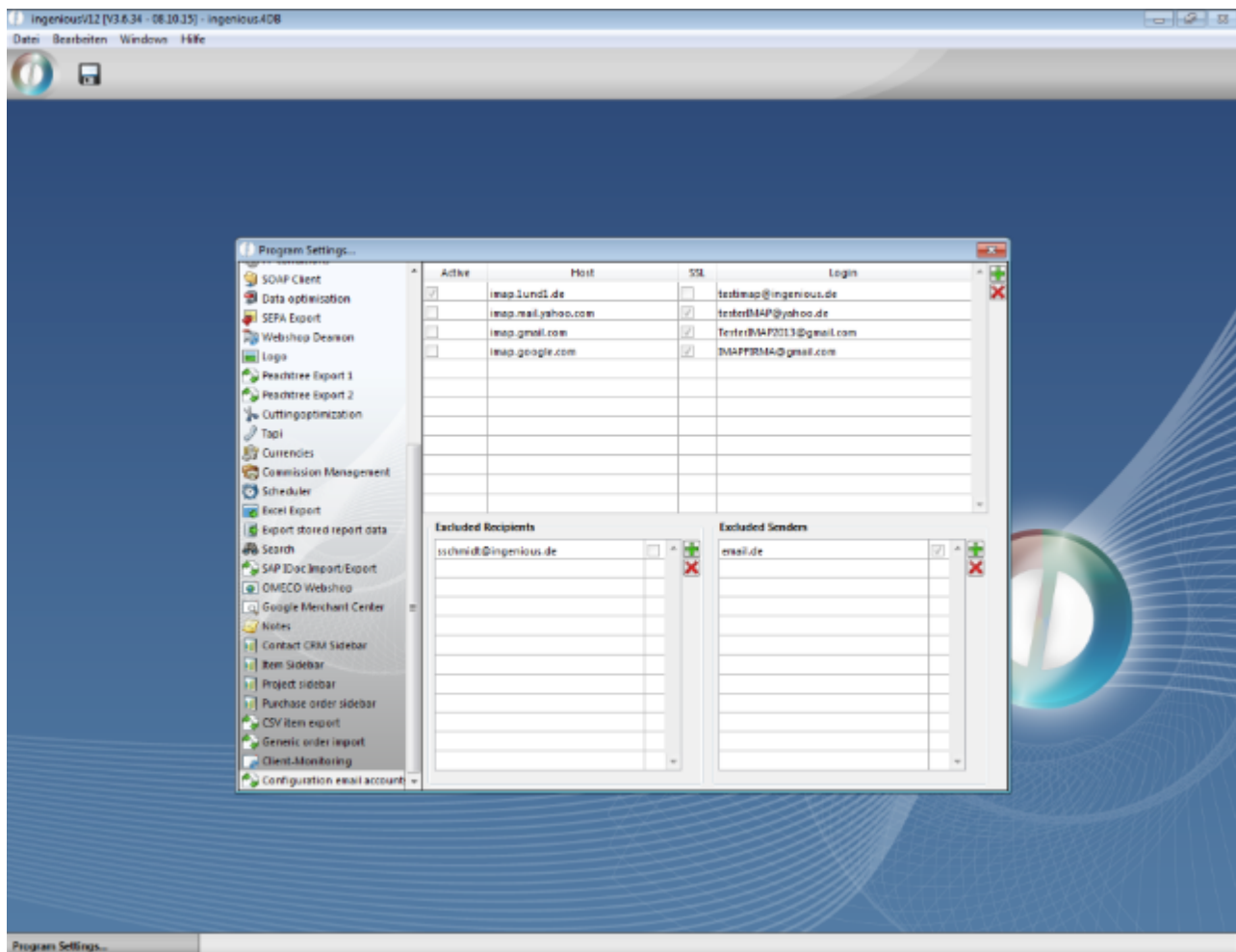
The emails will be received from server with IMAP and will be stored in the media folder of the contact.

The assignment is done by the email addresses that are stored in contact's details and address details.

In the global settings / "configuration email accounts" any amount of email accounts can be stored for receiving incoming or sent emails.

A new account can be configured with click on button 

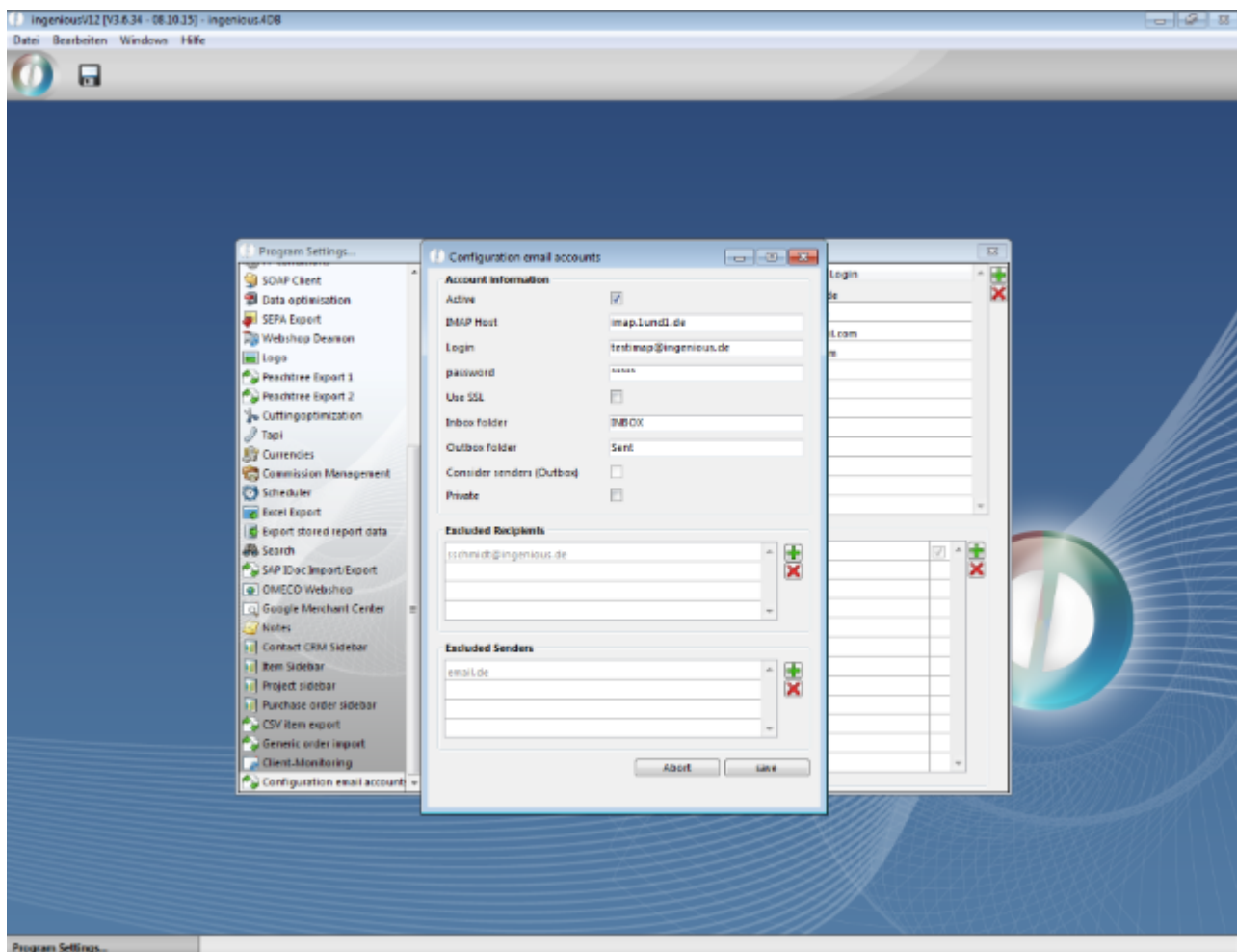
An existing account can be deleted with click on button 



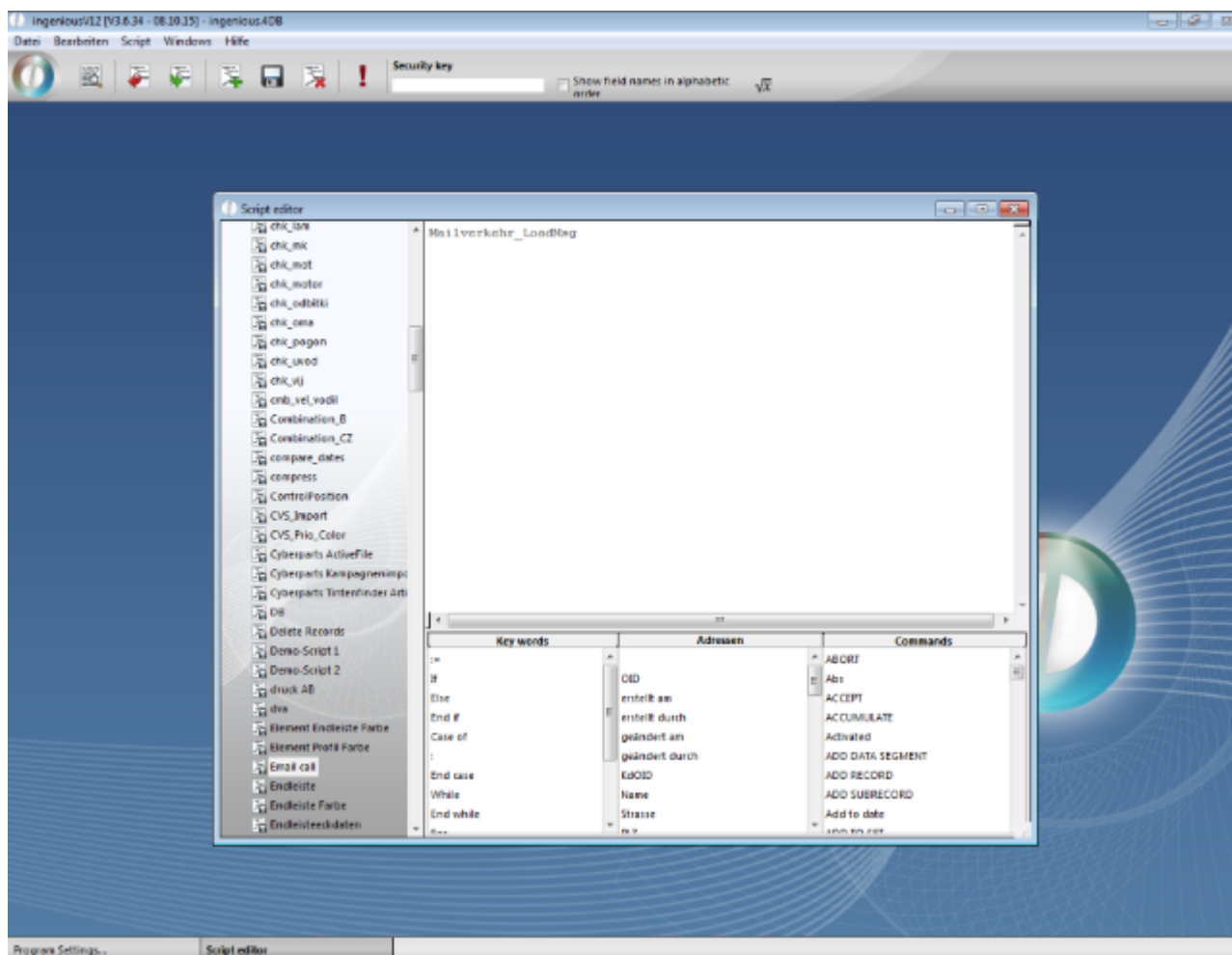
For each email account the single values for configuration can be set

Active	Selection by checkbox whether this account shall be included when receiving emails or not
IMAP Host	address of the IMAP host server
Login	Login of the email account
Password	Password of the email account
Use SSL	When the provider requires an SSL connection this checkbox has to be enabled.
Inbox folder	Name of the inbox folder. This has to be exactly this name that the provider gave this folder. You might need to ask your provider for details. For gmail accounts with only one folder for in and out this field has to be empty.
Outbox folder	Name of the outbox folder. This has to be exactly this name that the provider gave this folder. You might need to ask your provider for details. For gmail accounts with only one folder for in and out you have to fill the name of that folder here.

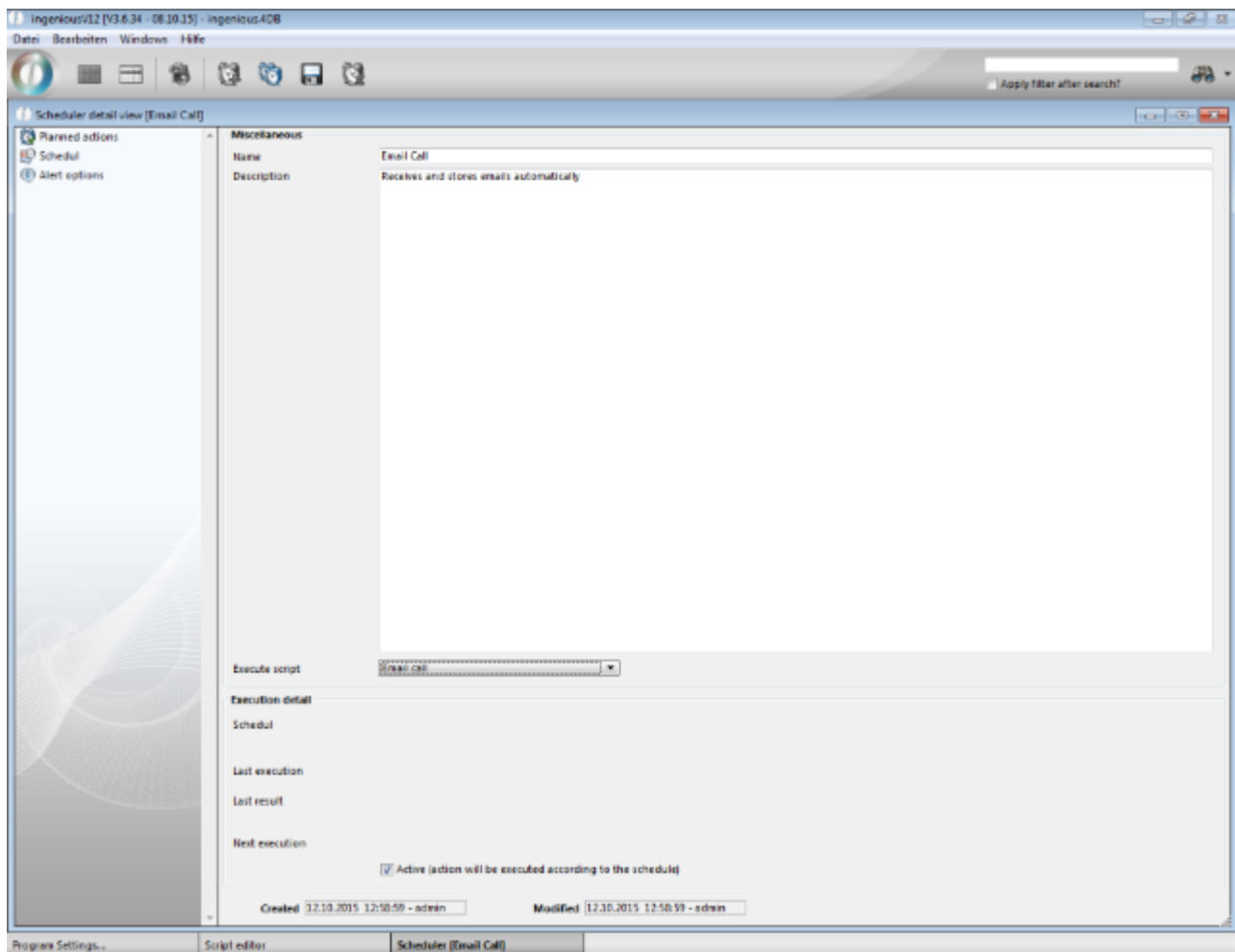
Consider senders (Outlook)	For assigning the contact the software searches in field recipient for sent emails in outbox folder and in field sender for emails in inbox folder. When there is only one folder as it is for gmail accounts, the software also need to search in field sender in outbox folder for incoming emails.
Private	Private emails are secured by an individual user right. You can set any email account to private that should only be visible for that user that has this email address stored in his user data.
Excluded Recipients	If you don't want to store the emails that was sent to all possible senders you can exclude single email addresses or even complete domains. You can define excluded recipients for each email account or globally. Global excluded senders are displayed in grey font.
Excluded Senders	If you don't want to store the emails that was sent to all possible senders you can exclude single email addresses or even domains. You can define excluded senders for each email account or globally. Global excluded senders are displayed in grey font.



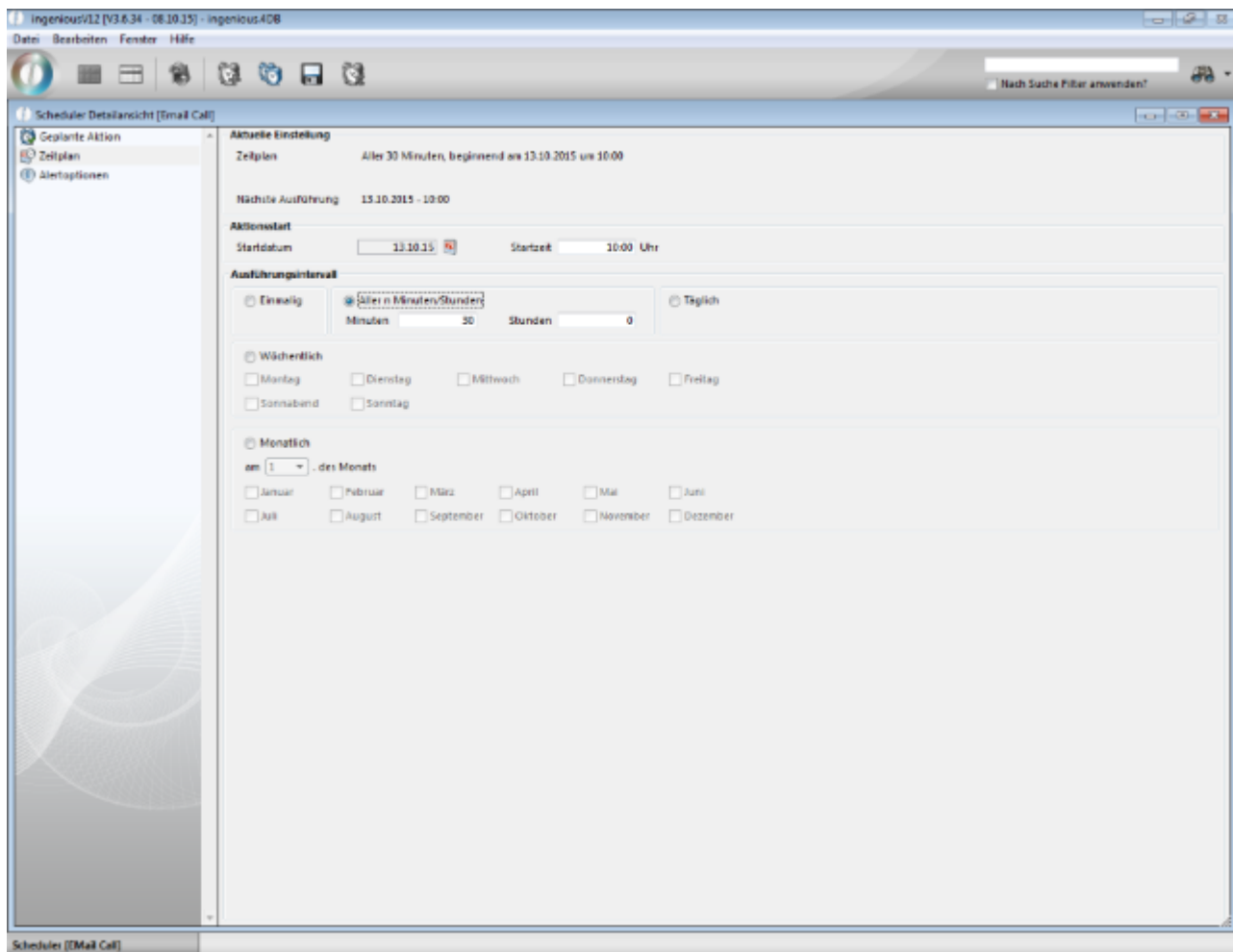
For an automatic periodical call a script with the method call "Mailverkehr_Load_Msg" needs to be created in stored procedures of scripteditor. The name of the script can be freely given.



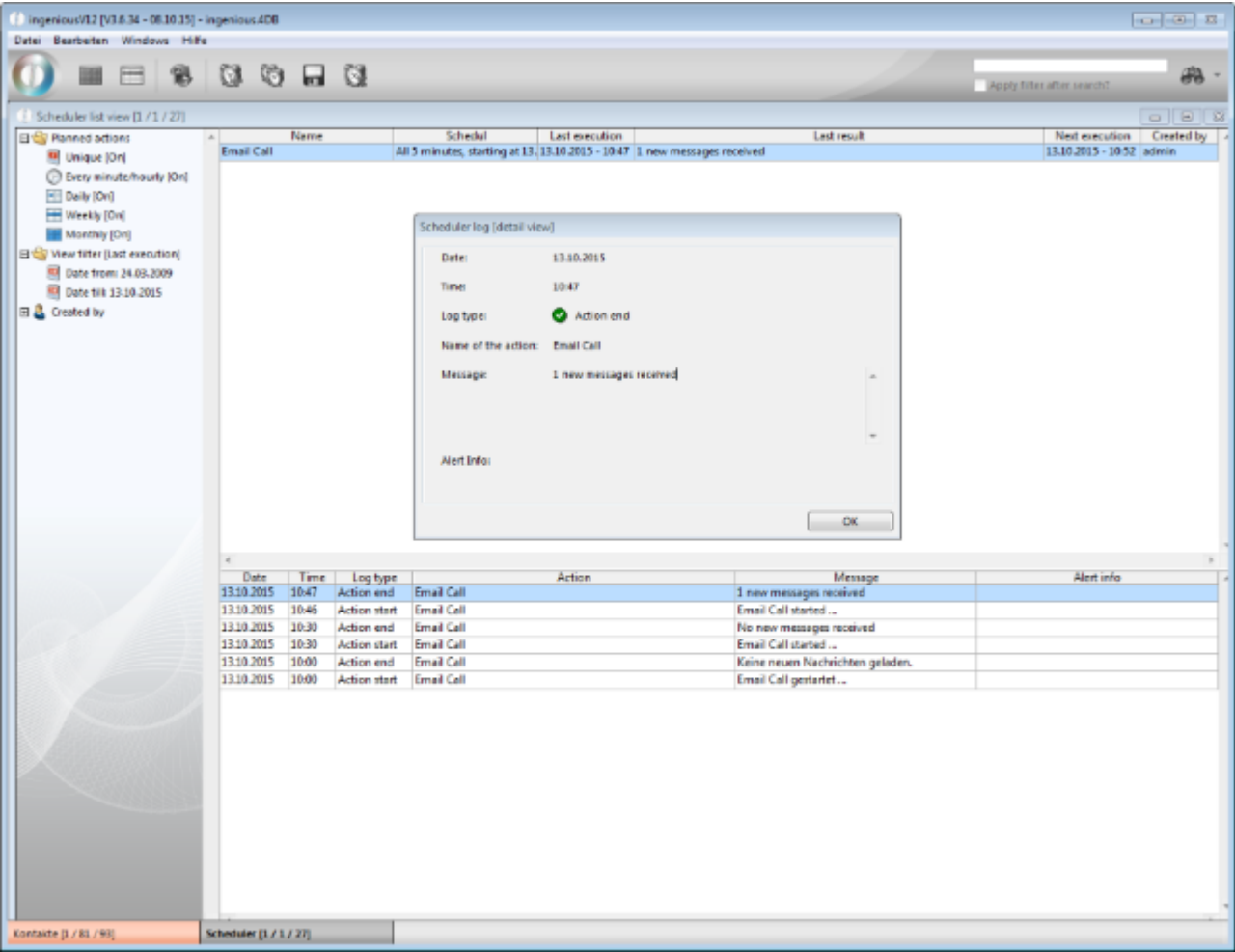
For this script a task in the scheduler needs to be configured.



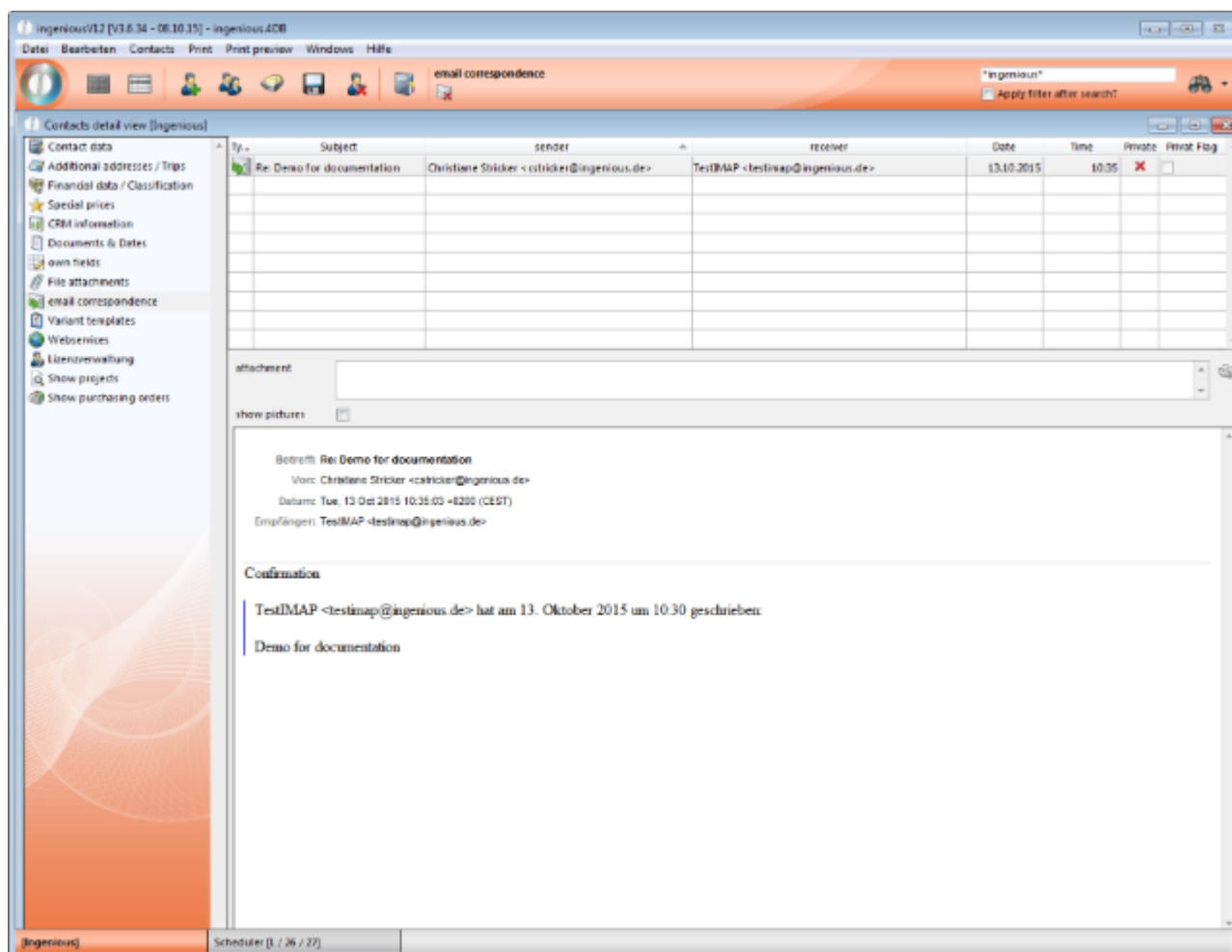
There you also has to set a schedule for this task.



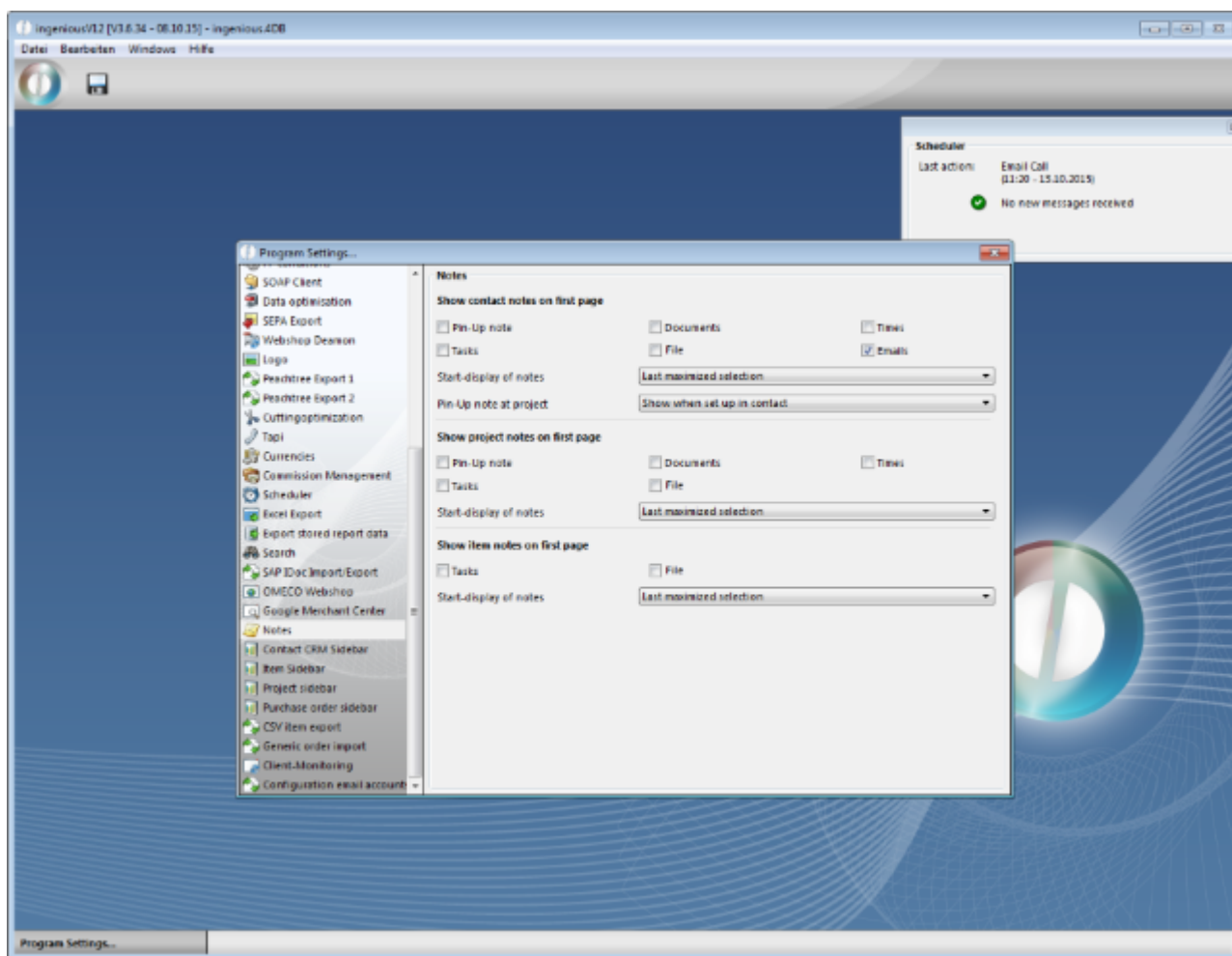
In the scheduler messages about success or failure is created for each run.

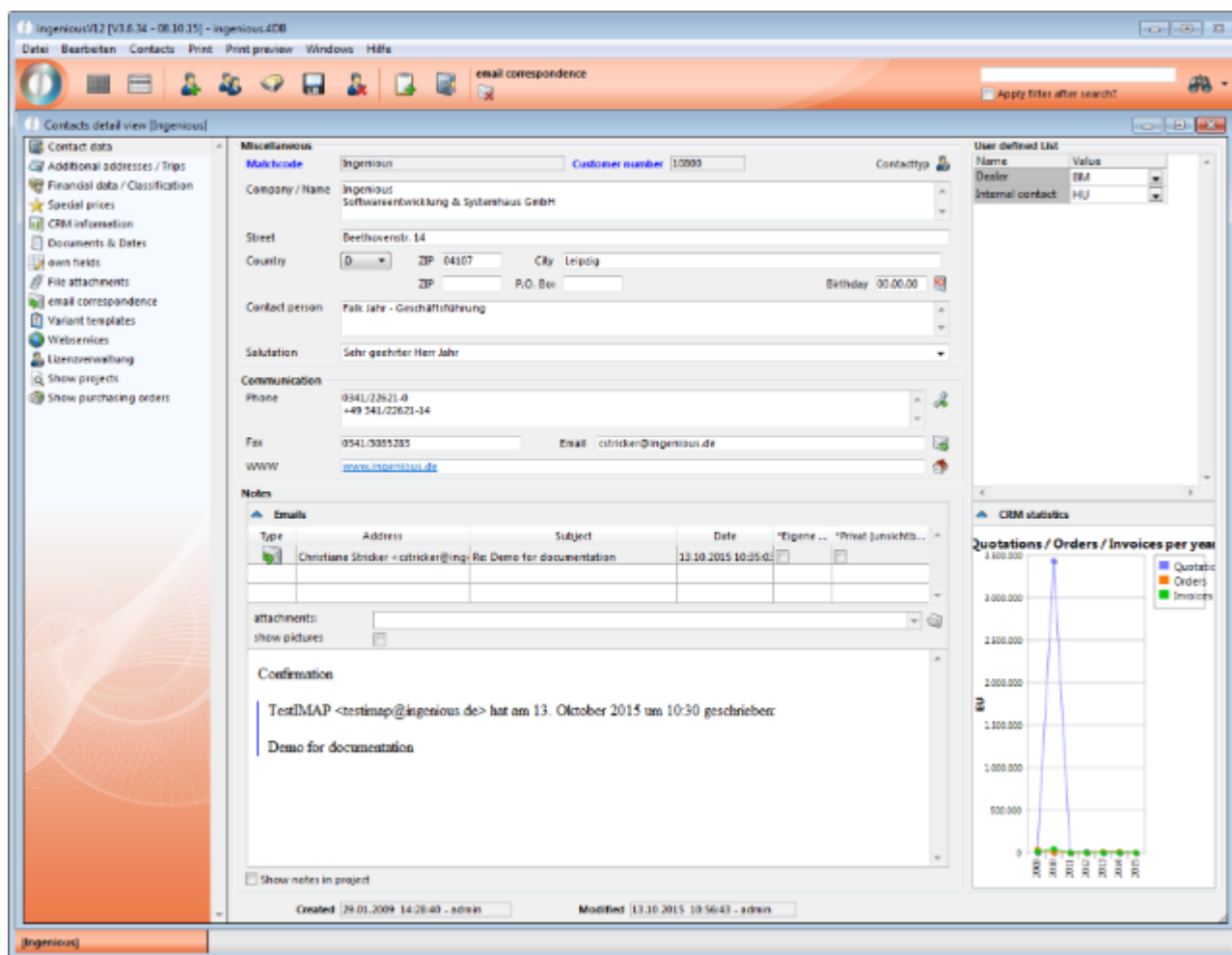


At the contact the emails are visible at tab "email correspondence". The complete email is shown. Also pictures and attachments could be displayed / opened.



You can also let the emails be displayed in the more detailed contact overview.





11.1.2 Enhancements 2015-2016

New user rights

505.510 – Edit exported payments

102.900 - Contact – Show email preview for private mails

New placeholders

{GrossTotal_B2B} - Sum of all B2B prices of a project, incl. VAT

{SPTotal_B2B} - {GesamtEUR_B2B} - Sum of all B2B prices of a project, incl. VAT

{1stSalesTax%_B2B} - {MWStVoll%_B2B} - Percentage of the full VAT of the B2B prices

New events for automatic scripts

Items – before editing variants

Items – after editing variants

Client – Logout

Enhancement of the script event "Items – calculate in the web" for usage in the sales rep web access

Enhancement of the script event „Items – calculate in the web“ for usage in the method
„CGI_B2B_ProjectStart/BTN_AddPos_Artikel_@“

New API methods

Tool_SaveReportRights - New method call for usage in the free data manipulation to export the user report rights into a csv file

Tool_Prj_Reservieren - New method call to set the status "reserved" in the projects by script

Parameter:

Tool_Prj_Reservieren(bUserInteraction;ptrAlertMsg;dDate)

1. (Optional) bUserInteraction: Boolean, default: true => User will be asked, whether he really wants to reserve the selected projects, he can enter a reserve date and he gets a message in the case of an error
2. (Optional) ptrAlertMsg: Pointer to String-Variable, only needed, if bUserInteraction = false => In the case of an error the message will be written to that variable that the pointer refers to
3. (Optional) dDate: Date, default: actual date, only needed if bUserInteraction = false => Date when the reservation should be executed

Tool_MailStack_API

Method 1 for two-stage process for sending emails; collects all mails in a stack (temporary storage)

1. (Mandatory) SMTP Host; will be taken from global settings, if empty
2. (Mandatory) SMTP Benutzer; will be taken from global settings, if empty
3. (Mandatory) SMTP Passwort; will be taken from global settings, if empty
4. (Mandatory) Sender
5. (Mandatory) Recipient
6. (Mandatory) Subject
7. (Mandatory) Body
8. (Optional) CC-Recipient
9. (Optional) BCC-Recipient
10. (Optional) Boolean, HTML-Body -> default: true
11. (Optional) Boolean (true - with, false - without SSL) -> default: false
12. (Optional) Pointer to Text-Array complete path to email attachments
13. (Optional) Integer, bodyType-constant with reference to 4D documentation for SMTP_SetPrefs, default: 1
14. (Optional) Return value - Text, Success message (LangGetRes (5362)) or error description

Tool_MailStack_Run

Method 2 for two-stage process for sending emails; sends all mails from the stack to the SMTP-server; no parameters

Tool_Get_PartListVariable (-> [Positionen]PrintVariables;"jum.m"{;True})

Parameters:

1. (Mandatory) Pointer to [Positionen]PrintVariables of the item to be read out
2. (Mandatory) Name of the part list variable to be read out
3. (Optional) default false - if true, both variables will be rebuilt, even when the actual item hasn't changed

Enhancement of the optional parameters for **Create_Task** to set the creator of the task

All Parameters:

1. (Mandatory) Text, Subject
2. (Optional) Text, Task description, Default equal to subject
3. (Optional) Text, Responsible user, Default <>login
4. (Optional) Number, Priority, Default 2
5. (Optional) Date, Due date, Default empty date
6. (Optional) Bool, Memo-Flag, Default False
7. (Optional) Number, Module, Default 0
8. (Optional) Text, Object OID, Default ""
9. (Optional) Text, Category, Default ""
10. (Optional) Text, Creator, Default <>login

New parameter for **Tool_Check_QuantityInStock**

Factor for determination of a multiple of the stock quantity (e.g. Tool_Check_QuantityInStock([Projekte]OID;1.3) -> the quantity stored has to be 30% higher than the consumed quantity)

Enhancements B2B

Enhancement of the B2B print function: With the parameter "&printtemplate={ReportNumber}" each print report that was configured in the global settings for one of the modules contacts, sales or production can be provided in the B2B by the report number.

- \printreport&printtemplate={ReportNumber} - complete call for printing a report
- \print&printtemplate={NameOfTheTemplate} - complete call for printing a project template

Enhancement of the price calculation in B2B parts quotes: If the dealer has stored a surcharge for a part list for the end customer, this percental surcharge will also be calculated for the single parts when the quote is converted to a parts quote.

Enhancement of the B2B parts quotes: With the function BTN_Duplicate_parts_sum a parts quote will be created with summarized parts / with stock lengths instead of cut parts

Divers minor enhancements

New **message box for the multi supplier form** to inform the user when a data record is blocked by another user.


Enabling sorting of the columns in the localization module

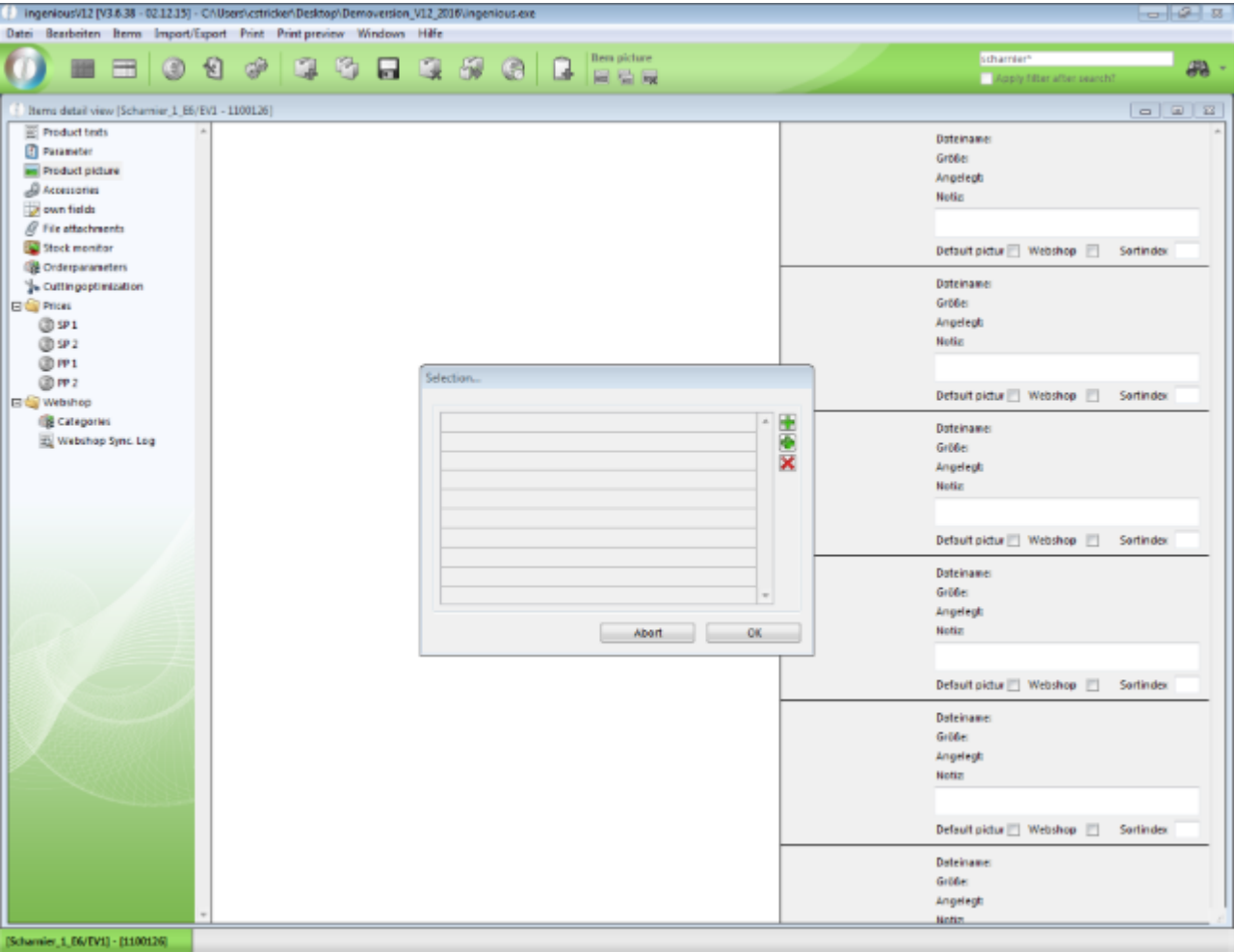
Function for **secure termination of the 4D server by a UPS** in the case of a power breakdown. For this the UPS has to be configured to save a file 4DServerUPSShutdown.txt (no content needed) to the database folder (this one that

contains the files ingenious.4DC and ingenious.4DD) in the case of an error; ingenious.V12 regularly checks the folder for that file and quits the 4D server when it detects the file.




After such a controlled shut down by the UPS the 4DServerUPSShutdown.txt has to be deleted from the database folder.

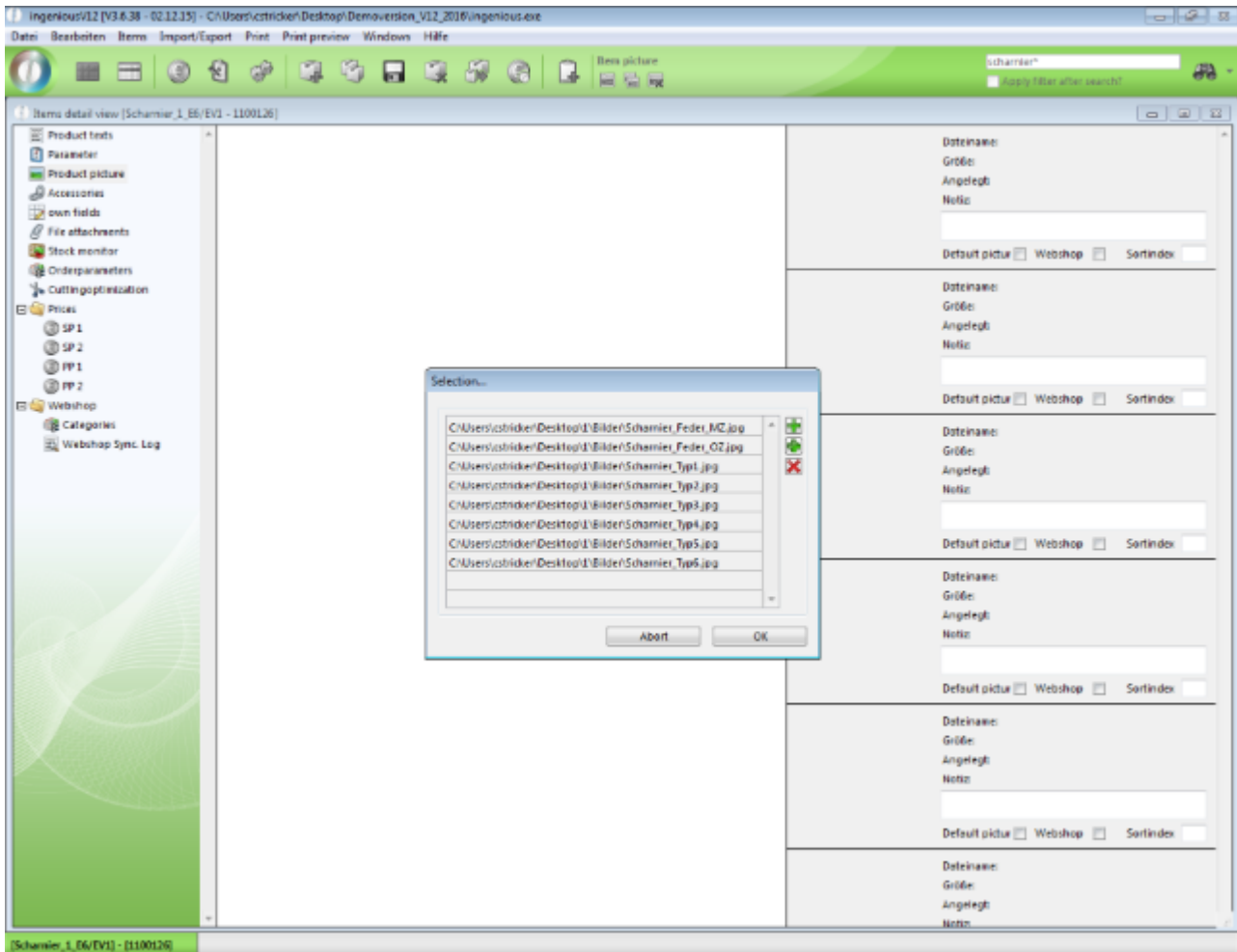
Enhancement for simultaneous **adding of multiple item pictures** from one folder:

With the new button  from icon bar of the item detail view multiple pictures can be added to an item with less steps in one process.



In the selection mask the following functions are available:

	Selection of single files, e.g. from different folders
	Selection of a folder that contains all picture files to be added
	Deletes the marked file from selection

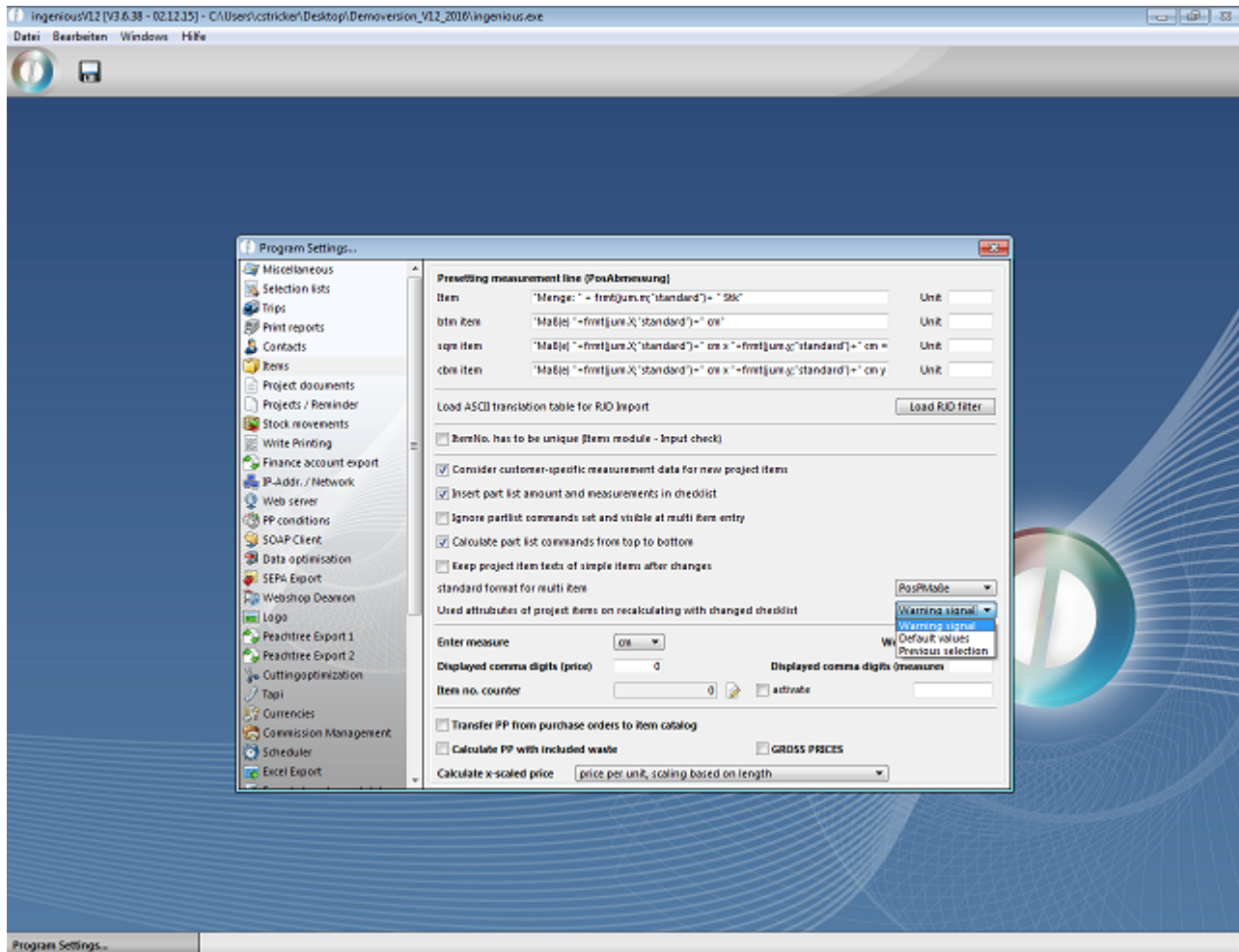


Enhancement of the function "**Print preview in project list and detail views**": Single reports can be combined to one by clicking on the parent entry (headline/folder). This works for main level as well as for sub levels.

Enhancement of the **fault tolerance of the restarter** to capture „Runtime Errors“

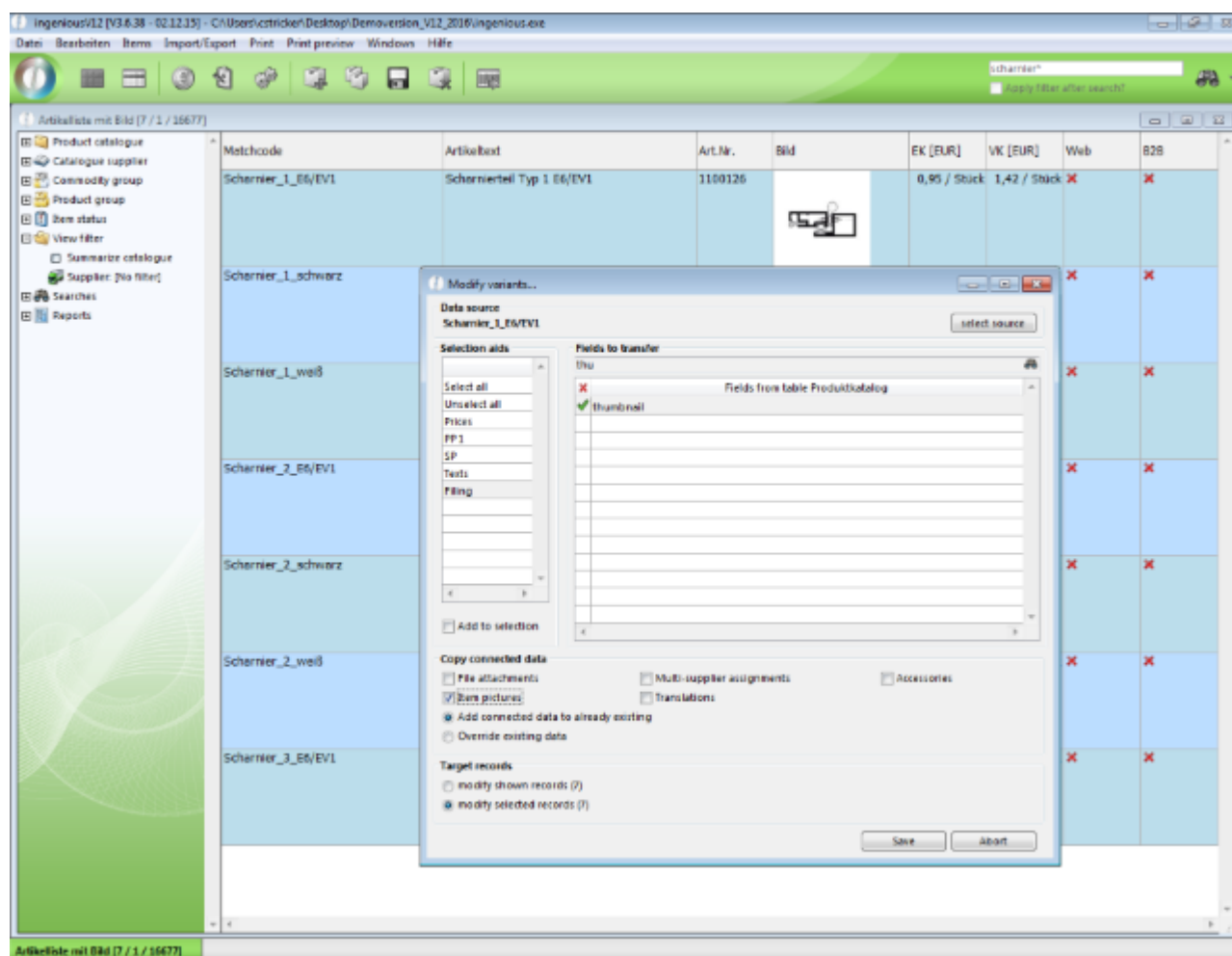
Enhancement of the global settings for a **default formatting of headers and footers** in project documents

Global configuration for **keeping or resetting of part list items** for part list recalculation in projects when part list parameters had changed in the meantime.

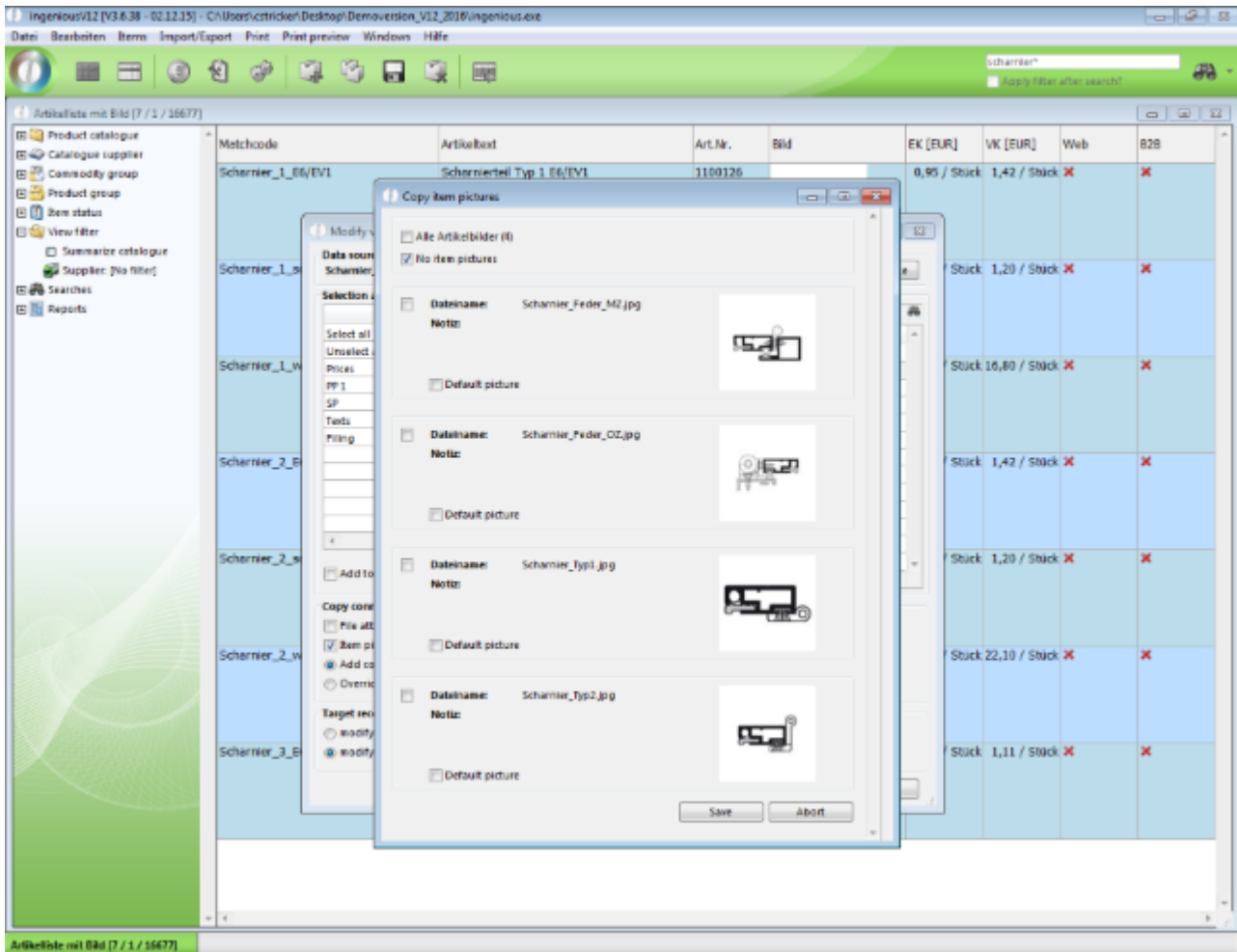


Minor changes for **recalculation of project items**: Validation of numeric checklist values, recovery of macros

Enhancement of the function „**Items – edit variants**“ for a selection, which item pictures to transfer, if more than one pictures are stored at the source item; and selection, which picture shall be marked as default.



After click on "Save" the selection and labeling of the pictures has to be done, when more than one pictures are stored at the source item.



11.1.3 Bugfixes 2015-2016

The following bugs of the program code were solved:

- Correction of the calculation of the time for next execution of a monthly script by scheduler for turn of the year.
- Correction of the storage of the session ID in the barcode inventory process
- Correction of the automatic scrolling in the form of item pictures
- Correction of the dissolution of items in English B2B templates for Word export
- Correction of recalculation of picture scripts in multi lingual part lists
- Correction for simultaneous recalculation of multiple part list items
- Correction of the B2B price calculation when converting a quote to a parts quote
- Correction of the report selection of contacts CRM information
- Correction of the recalculation of duplicated project items in the B2B
- Adaption of the English number formats in the dialogue window of the sales statistic
- Correction of the coloring of the items in item lists correspondent to their status directly after a change of the status.

- Correction of the function "Items – edit variants" to copy accessories of source item to a selection of other items
- Correction source/target for transferring of item prices within the items
- Consideration of individual project delivery addresses in the print report „Ladeauslastung“ autonomous of the Delivery addresses that are stored at the contact
- Correction PPS: multiple part list identifiers for 1 working station
- Correction of rounding stock quantities in the purchase order assistant and in the item list of purchase orders.
- Correction assignment of contact folders

11.2 Annual update 2016 -> 2017

11.2.1 New features

11.2.1.1 Collected direct debits

Direct debits for invoices of the same customer can be combined in a collected debit.

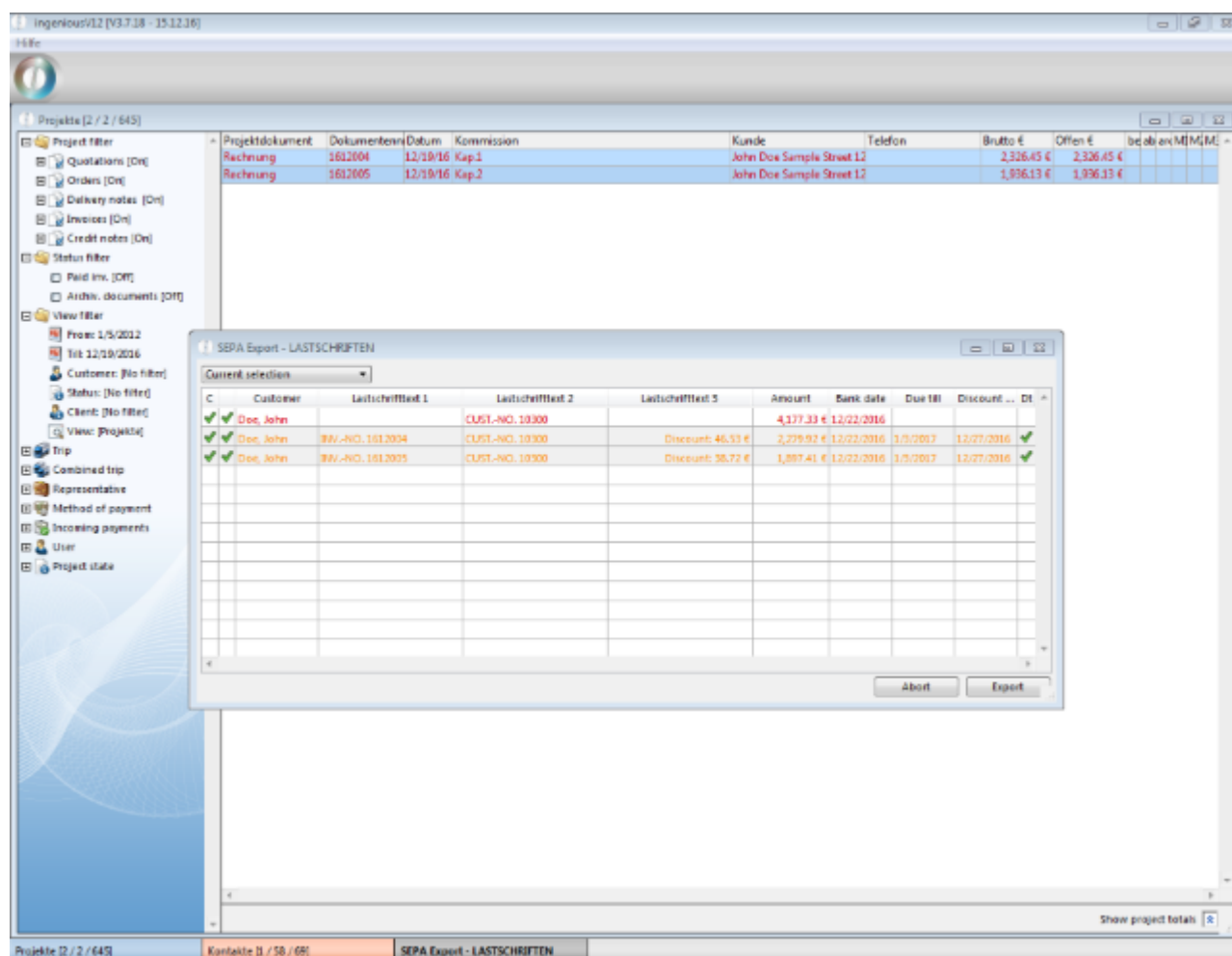
The requirements are:

- General SEPA details are configured in the program settings
- Bank details and the right payment method are stored at the customers
- Invoices are open (unpaid) and not exported yet

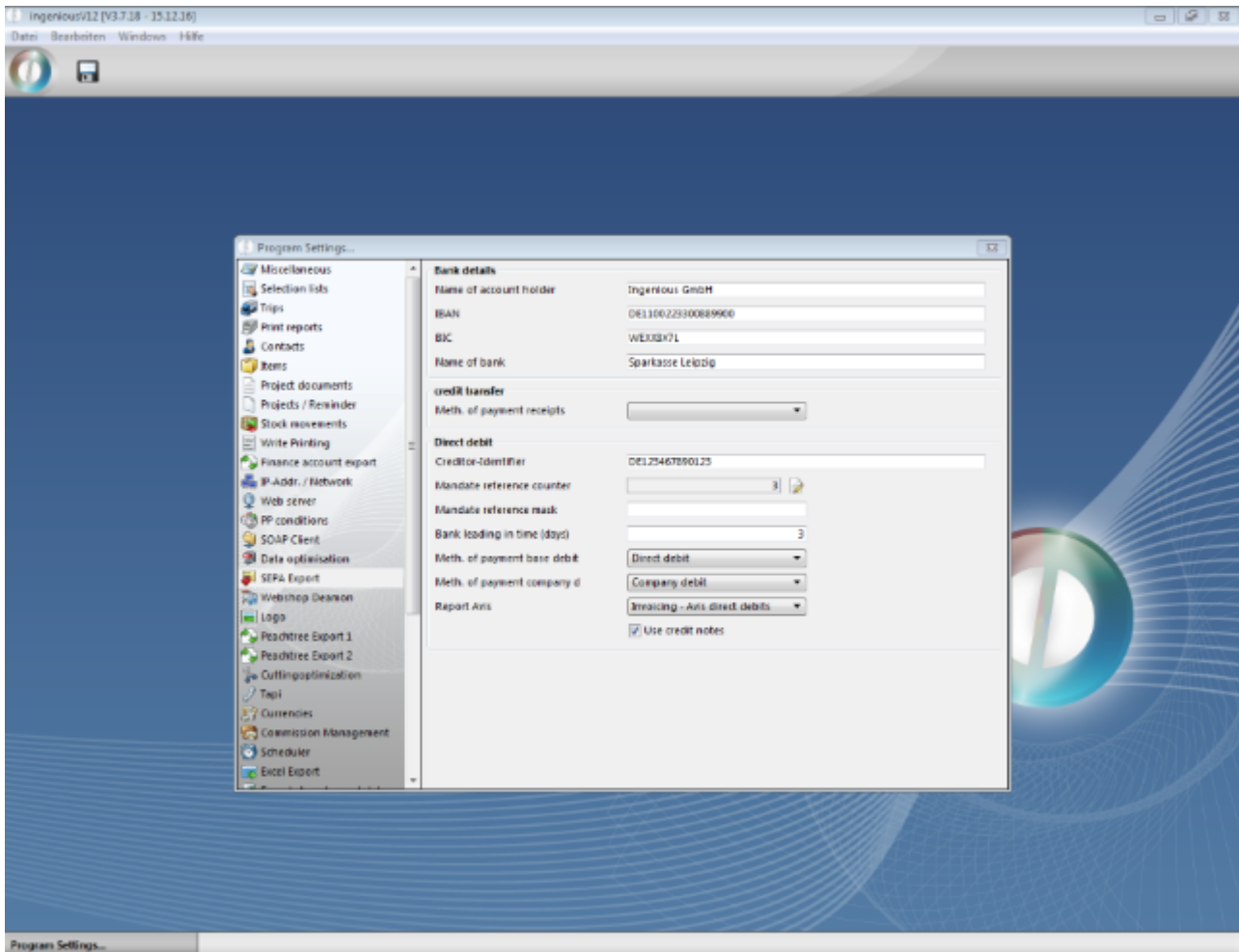
Within the mask for exporting the direct debits a new column "C" (=Combine) was added, with that the invoices of one customer can be combined to one direct debit.

With double click in the cell of one data set the summary of all open amounts of one customer is activated. A new collected data set is created as headline of its single invoices.

The debit that is sent to the exchange file only contains the collected data set with the summarized amount.



Referring to the export an avis is printed for each customer where each single invoice of the collected direct debit is listed. The print report for the avis has to be configured in the program settings.

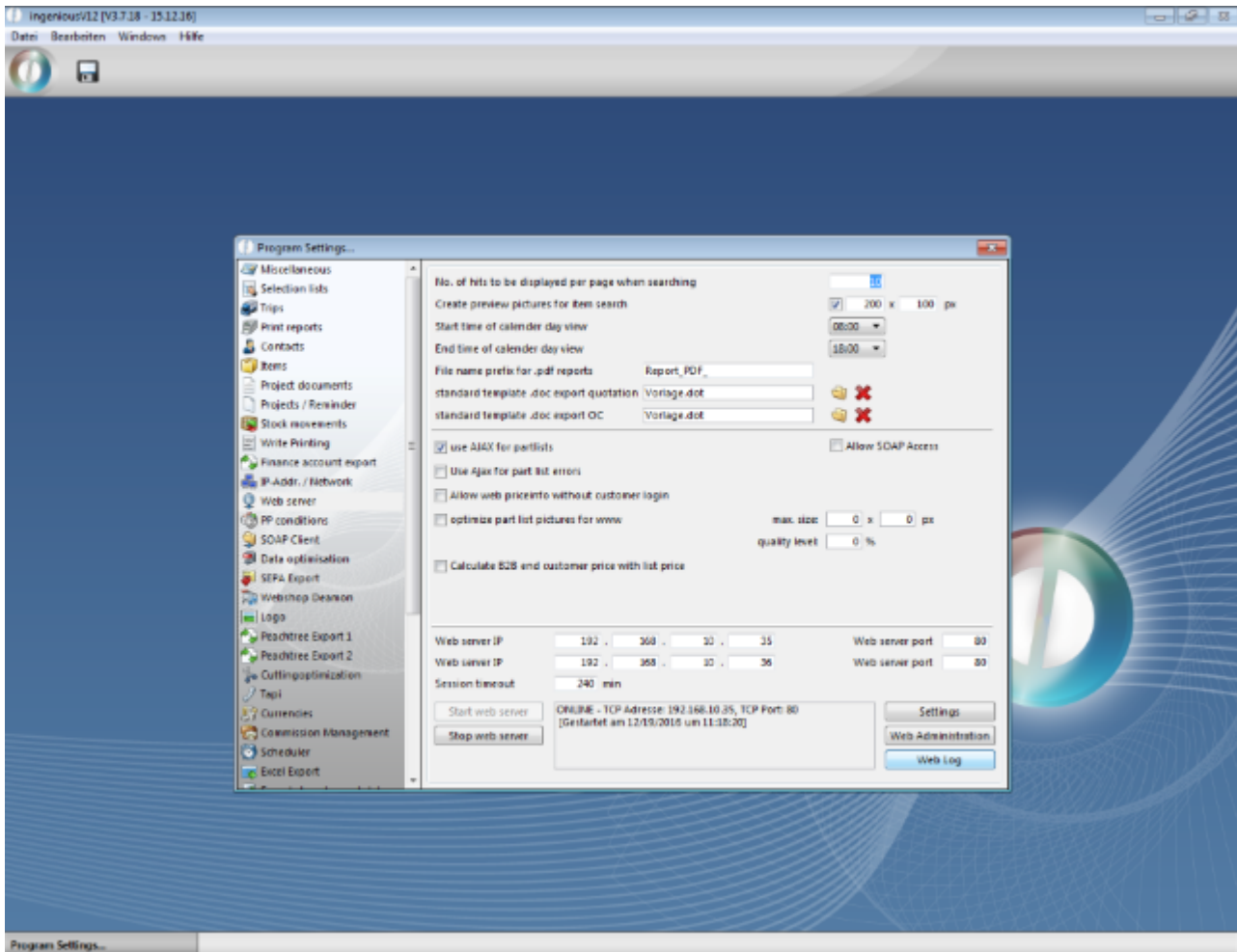


It can also be defined, whether credit notes should be considered in collected direct debits or not (only possible as long invoices with a higher amount are open than the credit amount).

11.2.1.2 Load balancing for webservice

Speed shortage in the ingenious.V12 web modules, that are not caused by an instable internet or network connection, but by increasing usage, can be faced with load balancing.

For this purpose a second ingenious.V12 web server is installed in the network (separated licence is needed) and an upstream load balancer (Apache server) is set up.



The load balancer distributes all incoming requests to both web clients.

For the installation of the load balancer PHP; MySQL and Apache is needed. These components have to be started as services to guarantee a permanent availability, also e.g. in the case of a unplanned restart of the computers.

The following lines have to be added after the #LoadModule segment in the cofiguration file of the Apache server:

Lastverteilung

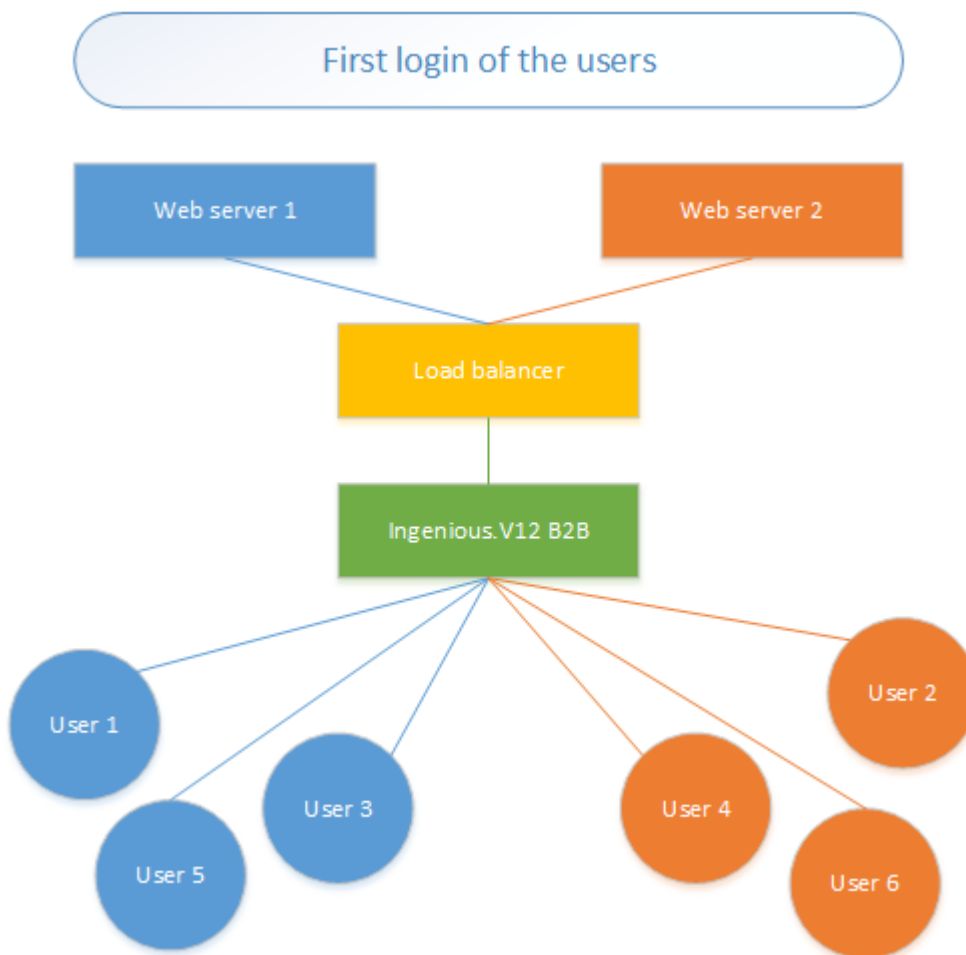
```
LoadModule proxy_http_module modules/mod_proxy_http.so
LoadModule proxy_module modules/mod_proxy.so
LoadModule proxy_balancer_module modules/mod_proxy_balancer.so
LoadModule headers_module modules/mod_headers.so
LoadModule deflate_module modules/mod_deflate.so
LoadModule rewrite_module modules/mod_rewrite.so
# Weighted balancing: {IP WebClient 1}:{Port WebClient 1}
<VirtualHost *: {Port WebClient 1}>
    Header add Set-Cookie "ROUTEID=.%{BALANCER_WORKER_ROUTE}e; path=/"
    env=BALANCER_ROUTE_CHANGED
    <Proxy balancer://mycluster>
        BalancerMember http://{IP WebClient 1}:{Port WebClient 1} route=1
        BalancerMember http://{IP WebClient 2}:{Port WebClient 2} route=2
    ProxySet stickysession=ROUTEID
```



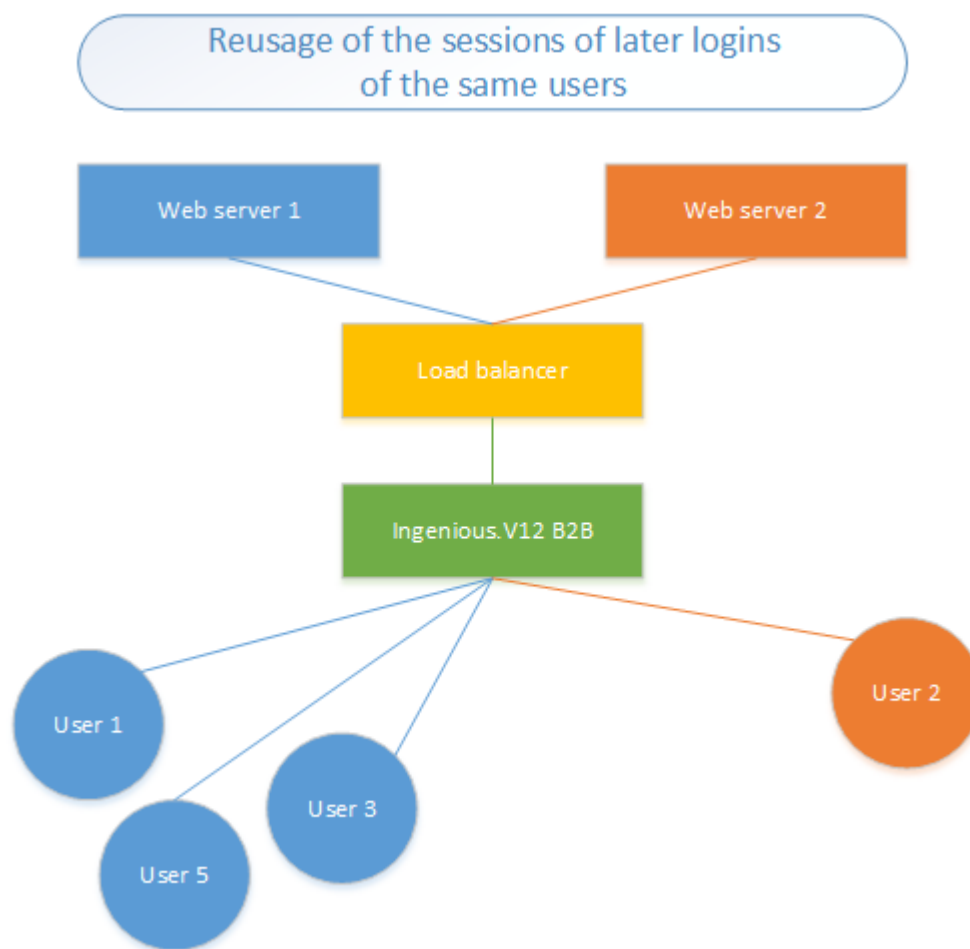
```
ProxySet lbmethod=bybusyness
</Proxy>
ProxyPass / balancer://mycluster/
ProxyPassReverse / balancer://mycluster/
</VirtualHost>
#Load Balancer Manager: {IP WebClient 2}:{Port WebClient 2}/bm
<Location *:{Port WebClient 2}/bm>
  SetHandler balancer-manager
  Order Deny,Allow
  Allow from all
</Location>
```

Für erstmalige Anmeldungen werden die Benutzer gleichmäßig auf die Web Server verteilt.

With first login the users will be distributed equally to the web servers.

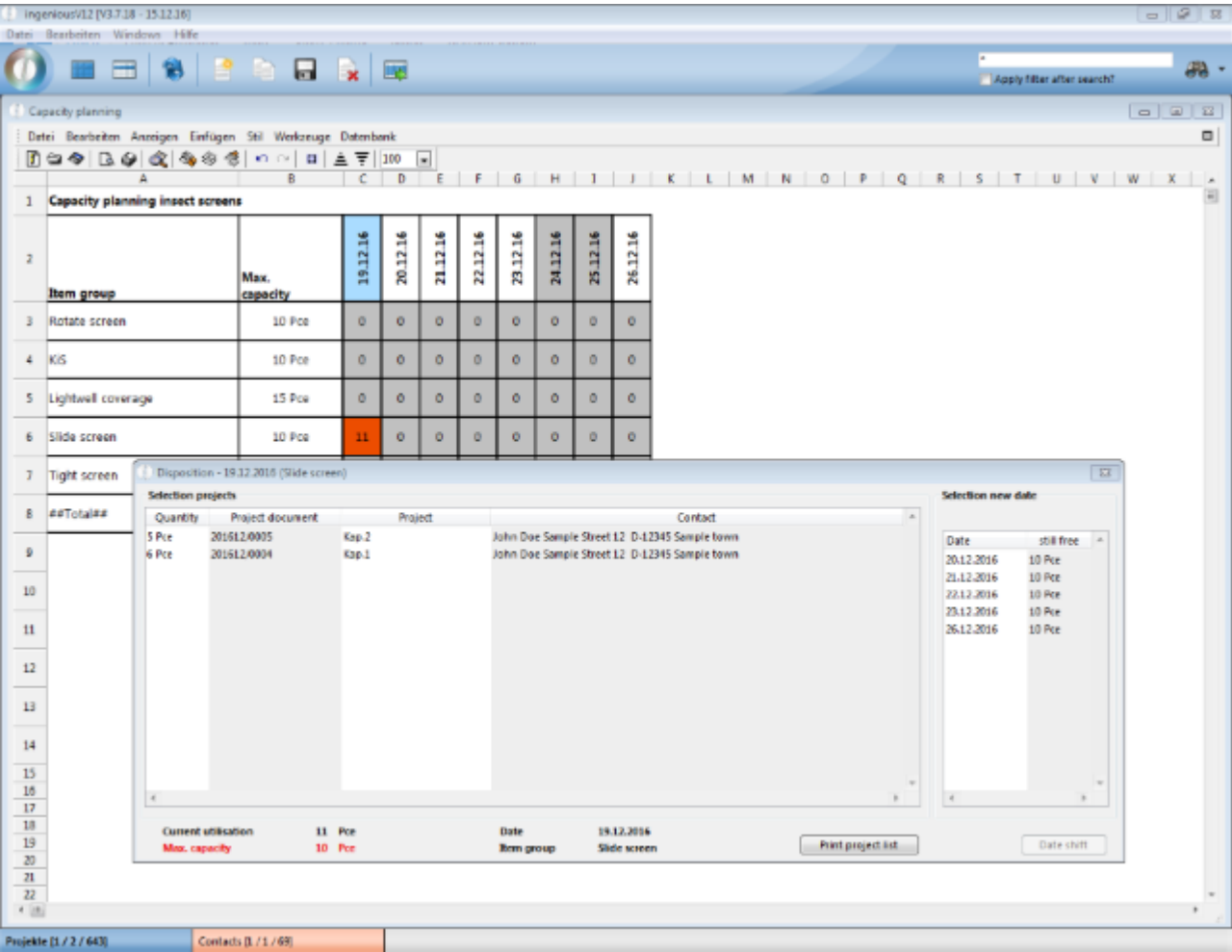


With all following logins the users will be redirected to this webserver where they first logged in, if a valid session ID exists.



11.2.1.3 Printing the capacity disposition

For external planning of the disposition of single orders in case of capacity overload a list of the projects of a disposition view can be printed. It can also be printed for archiving for example.



11.2.2 Enhancements 2016-2017

New Features

Distribution of web services to 2 different clients to share the capacity for high traffic	Load balancing for webservices (Section 11.2.1.2)
Avis function for SEPA debits	Collected direct debit (Section 11.2.1.1)
Printing the disposition view of a capacity planning table	Printing the capacity disposition (Section 11.2.1.3)

Diverse minor enhancements

- New Script event "Projects - Mail" (ErrorMsg # "" -> Abort / manipulation of vtMailTo, vtSubject, vtBody, vtAttachment / The last allows to list multiple file pathes separated by "|")
- Calculation of the summarized reserved quantity in the stock monitor with different time frames (Program

- settings, page stock movements)
- HTML like text templates for surcharge items
- New API-function "Tool_Update_Lang" for the reimportation of externally modified language files
- Enhancement of the method "Tool_Update_Project", to set the field "[Projekte]Archviert" (Project archived)
- Function ArtField() in measurement sheets for reading out single fields of the part items that are used in partlists
- New Service methode for correcting stock movements for revision of an existing stock movement data set

11.2.3 Bugfixes 2016-2017

The following bugs of the program code were solved:

- Bugfix of project selection in the dialogue PrintG_PRJ_ShowVertreterDialog
- Bugfix Printing measurement sheets in combination of "<ProveArea VarNotNull='X'>...<PrintArea>...</PrintArea TestColumn='Y'>...</ProveArea>"
- Every time when a contact is deleted, all linked user fields will be deleted, too
- Bugfix TAPI
- Adjustment of the generic Drag&Drop selection dialogue, index error when there were more than 32767 elements
- Bugfix: Sidebars -> text fields were randomly reformatted to date fields
- Bugfix Printing measurement sheets with picture scripts and repeated lines
- Bugfix PPS (Identification of vPPS_NewItem, Handling new PPS items in workstations with enhanced planning)
- Bugfix: Serial printing of contact documents in the background (e.g. for function print preview)

11.3 Annual update 2017 -> 2018

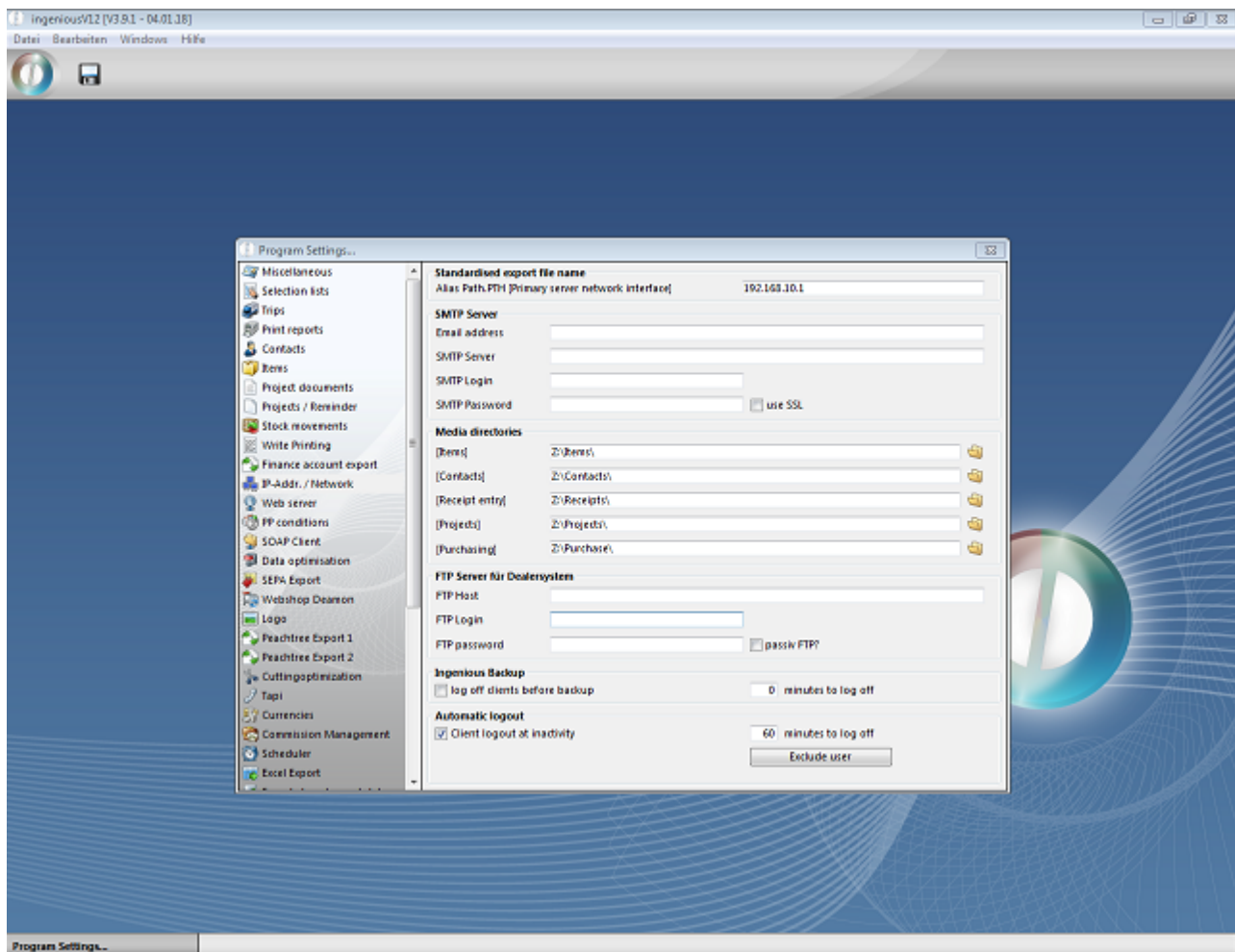
11.3.1 New features

11.3.1.1 Logout inactive clients

Some users stay logged in even though they do not use ingenious.V12 at all. This blocks licenses and prevents other users from logging on.

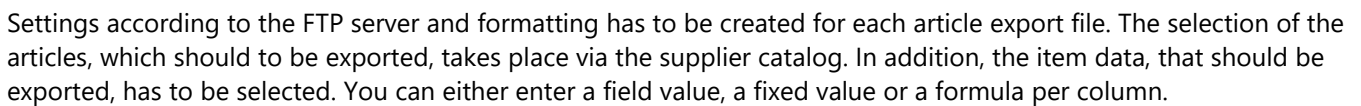
In order to counteract this problem, a maximum period of inactivity can be stored in the program settings (maximum 60 minutes).

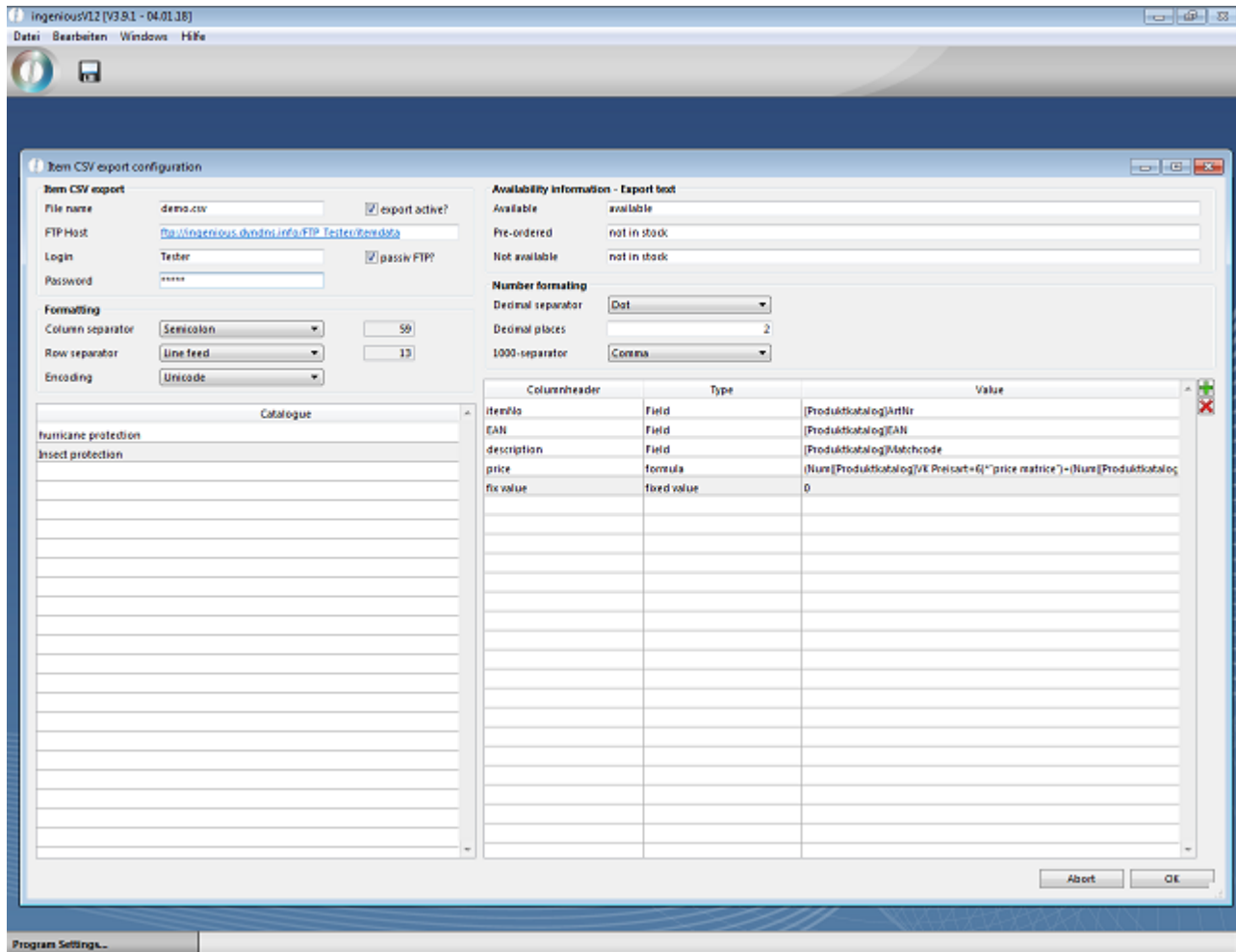
In addition, it is possible to define exceptions to this rule.



11.3.1.2 Generic item-export

Often it is necessary to export article data in a predefined format, for example for catalog creation or because customers want to import this data into their own systems. For these cases, ingenious.V12 contains an export interface to export article information in a self-defined format to a CSV file and store it directly on an FTP server. The definitions are made in the program settings. It is possible to define and save several export formats.





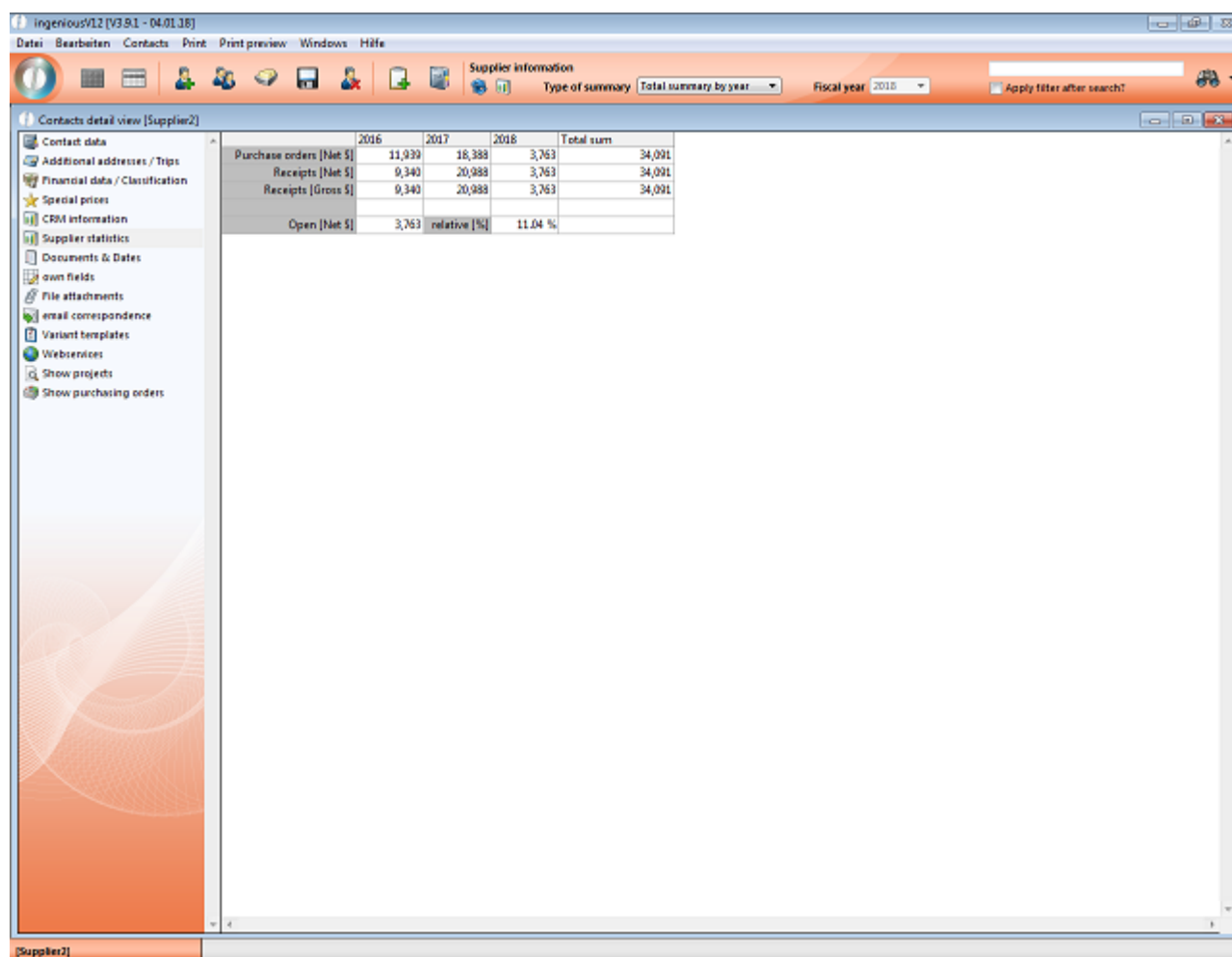
The export of all active configurations is started with the API call **ART_CSV_Export („COMPLETE“)**.

11.3.1.3 Supplier-Sales-Analysis

In the section Supplier information, ingenious.V12 provides you a complete overview over the purchasing volume and the invoices received from the supplier.

The period of the analysis can be freely selected and is compressed either monthly or annually.

The button  updates it according to the selected settings.



ingenious.V12 [V3.9.1 - 04.01.18]

Datei Bearbeiten Contacts Print Print preview Windows Hilfe


Supplier information

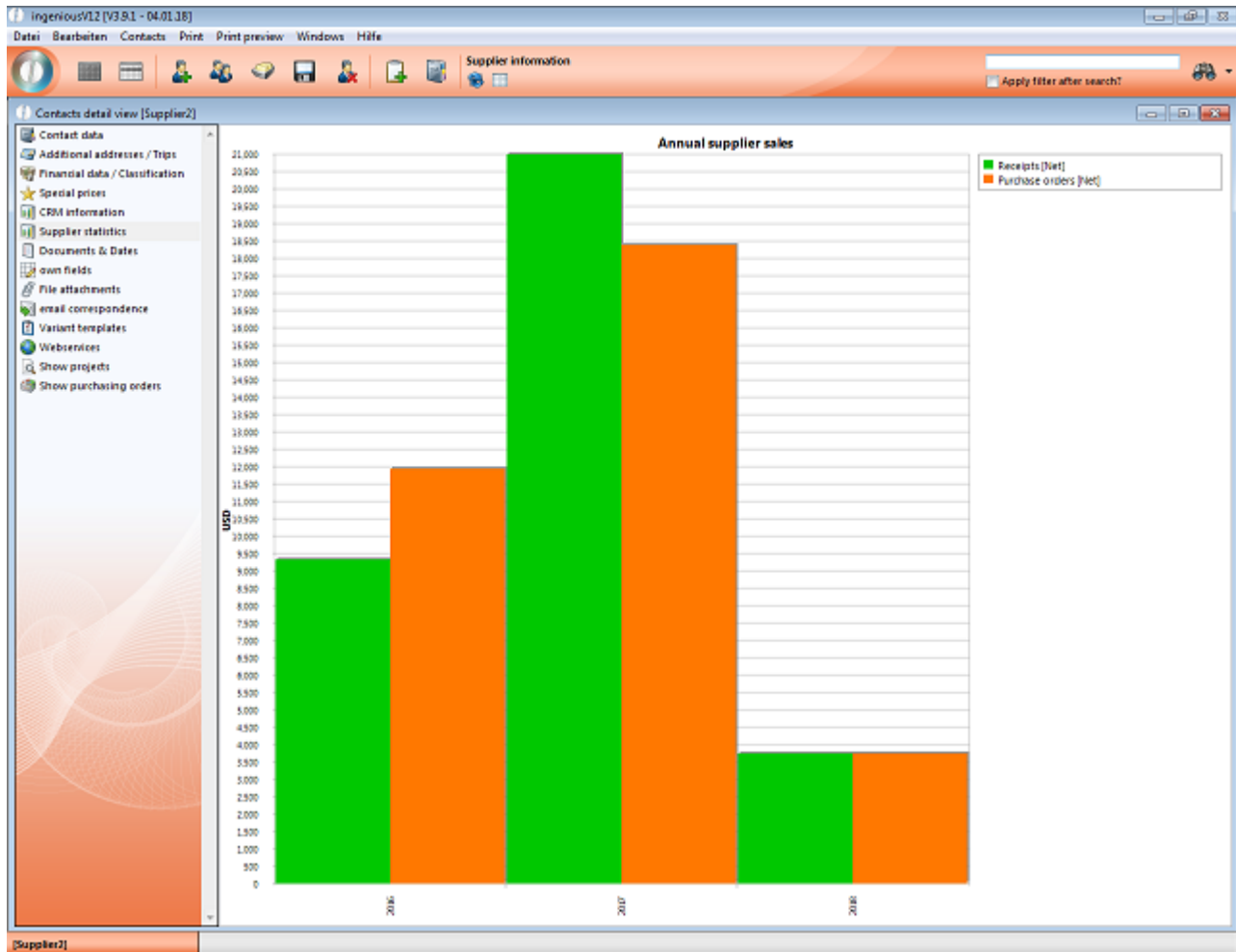
Type of summary: Total summary by year Fiscal year: 2018 Apply filter after search?

Contacts detail view [Supplier2]

	2016	2017	2018	Total sum
Purchase orders [Net \$]	11,939	16,388	3,763	34,091
Receipts [Net \$]	9,340	20,988	3,763	34,091
Receipts [Gross \$]	9,340	20,988	3,763	34,091
Open [Net \$]	3,763	relative [%]	11.04 %	

Supplier2

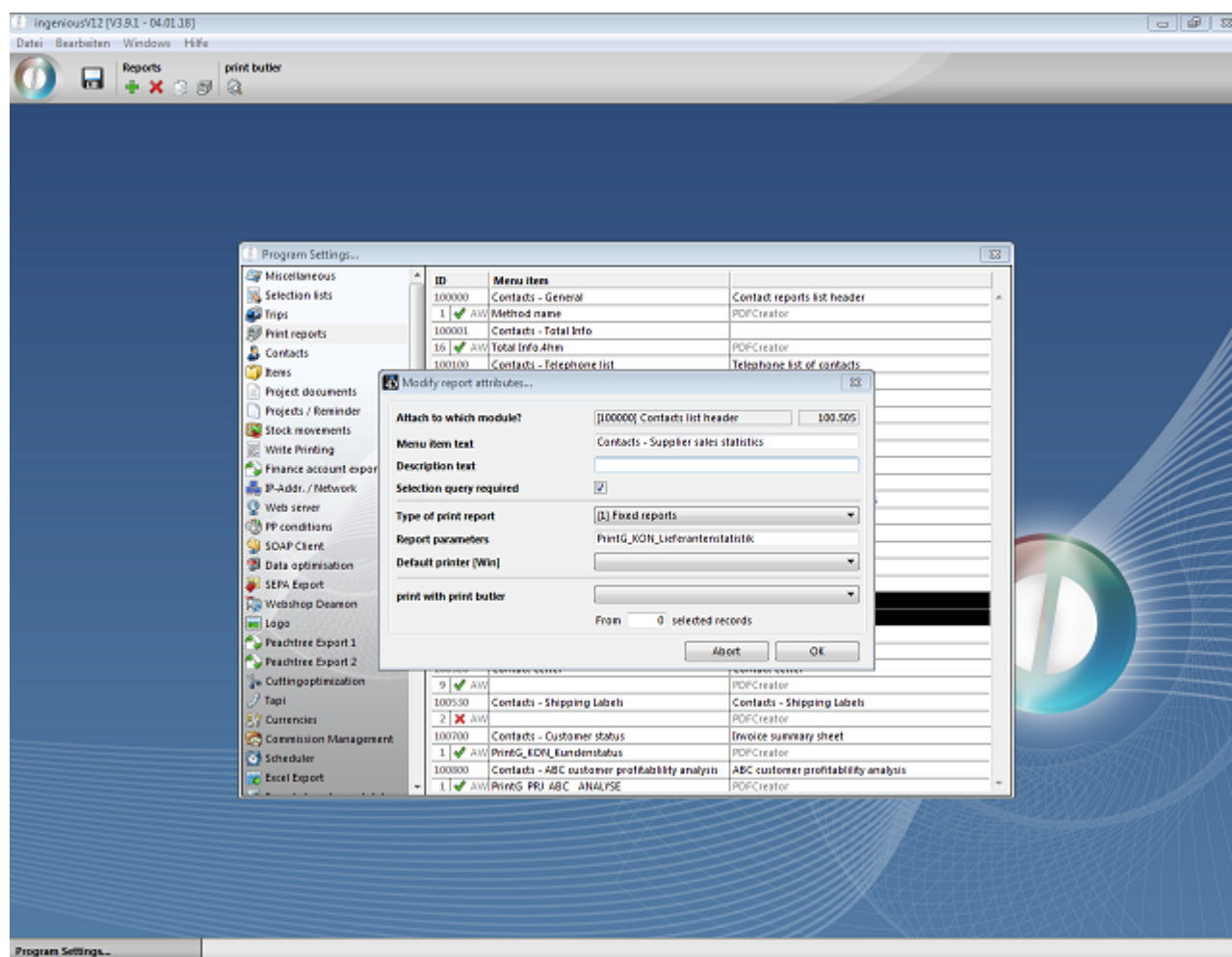
With the button  you can switch between a tabular and graphic display.



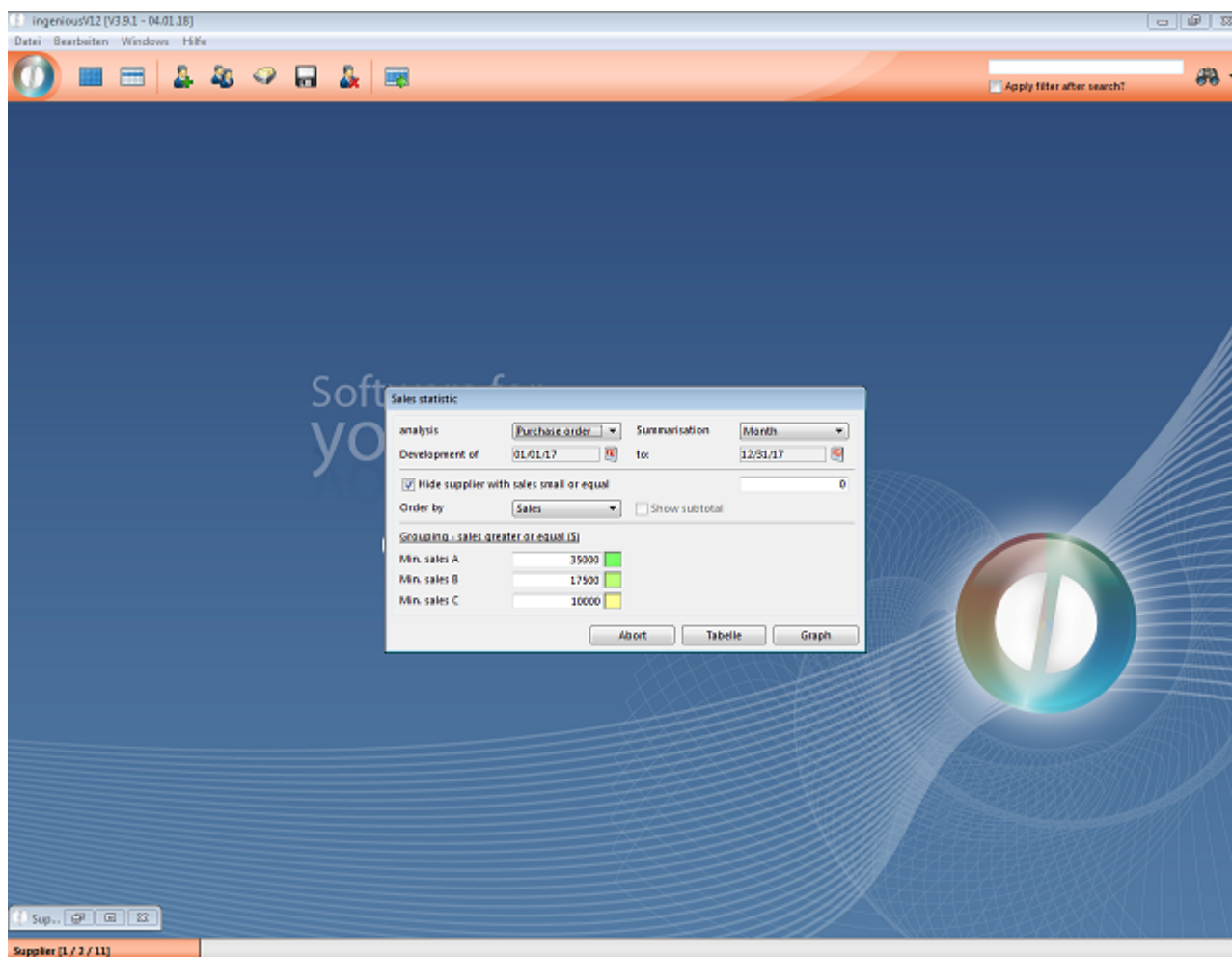
Print report „Supplier sales statistics“ Additionally to the analysis per supplier, there is a new print report "Supplier sales statistics" with which all suppliers can be analyzed. These can be displayed in a tabular or graphical way, too.

To use this print report, you must first create a new print report in the program settings. It has to be from type "[1] fixed reports". The API-method "PrintG_KON_Lieferantenstatistik" must be entered as parameter.

Furthermore, the report must be enabled in the report rights per user.



When running the print report, settings according to evaluation period, data source, filters and sorting have to be made.



After confirmation of the settings, the statistics can be displayed either in tabular or graphical form.

ingenious.V12 [V3.8.1 - 04.01.18]

Datei Bearbeiten Windows Hilfe

Apply filter after search!

Sales statistic

Datei Bearbeiten Anzeigen Einfügen Stil Werkzeuge Datenbank

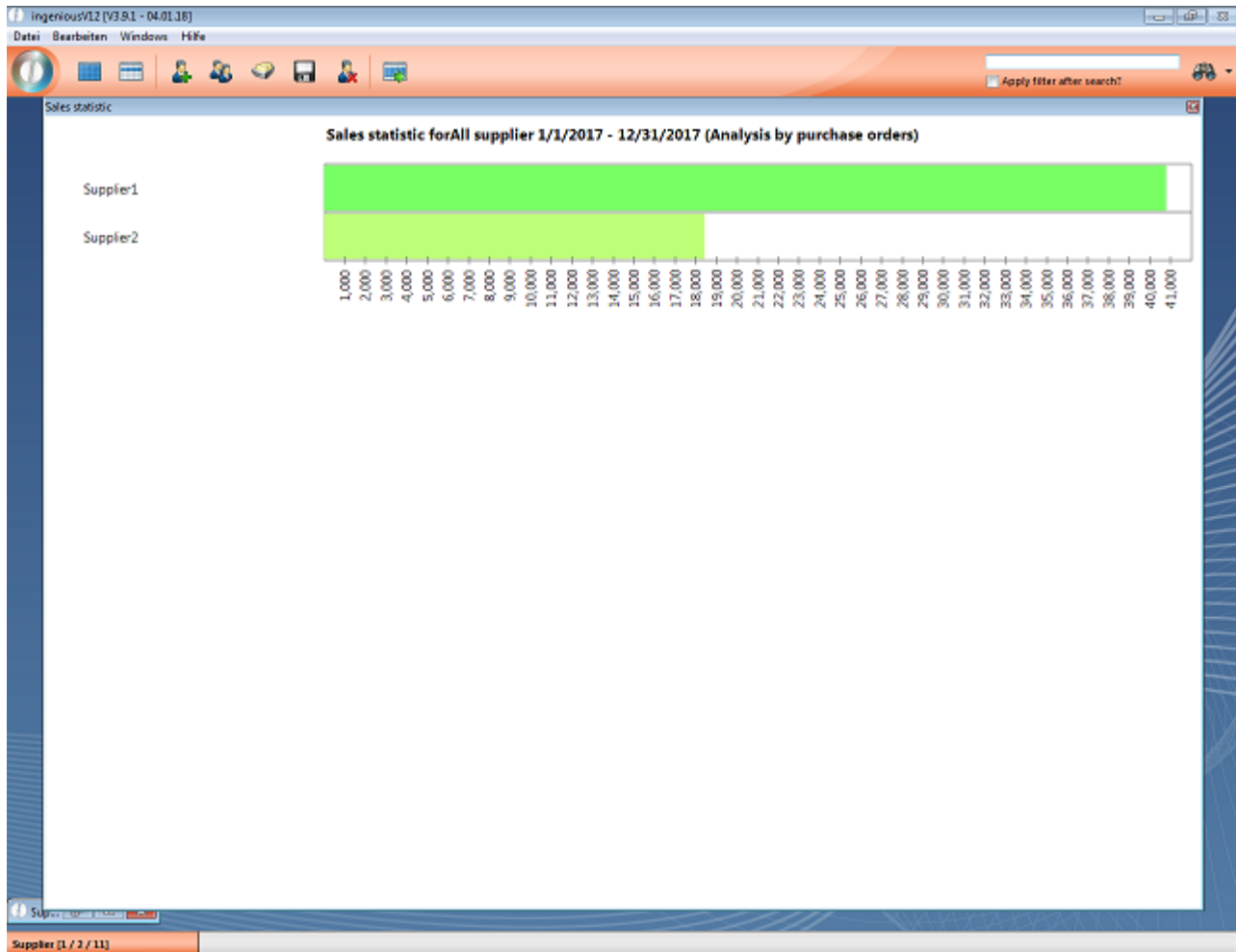
1 Sales statistic for All supplier 1/1/2017 - 12/31/2017

2 Analysis by purchase orders

3

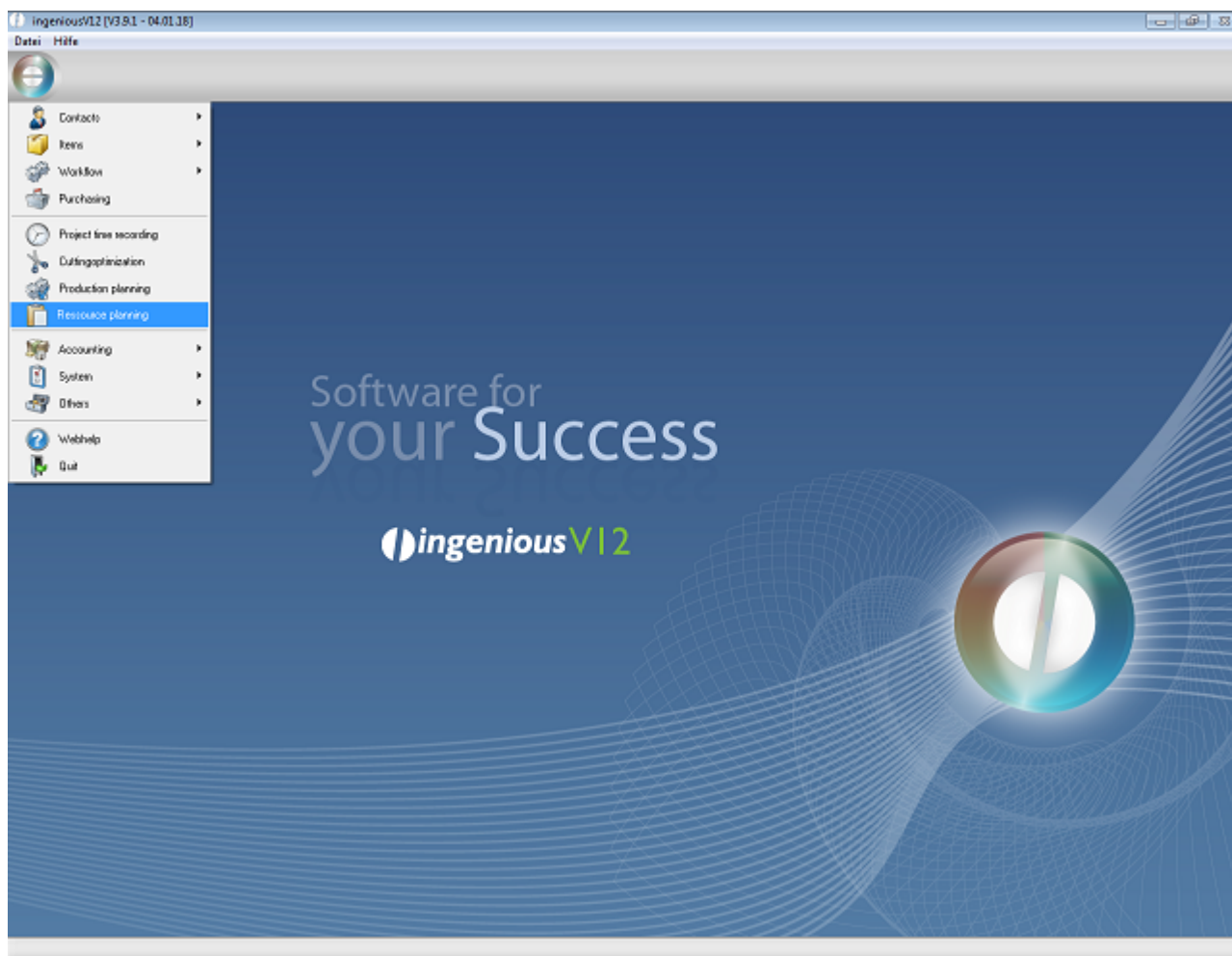
OrderNo.	Supplier	Zip	City	January 2017	February 2017	March 2017	April 2017	May 2017	June 2017	July 2017	August 2017	September 2017	October 2017	November 2017	December 2017	2017
5556	Supplier1	32348	Chicago	0.00	0.00	0.00	0.00	35.940.00	0.00	0.00	0.00	0.00	5.100.00	0.00	0.00	40.040.00
5557	Supplier2	32348	Chicago	0.00	0.00	3.890.00	0.00	4.401.00	0.00	4.401.00	0.00	2.844.00	0.00	2.844.00	0.00	18.380.00
	Gesamtsumme			0.00	0.00	3.890.00	0.00	40.041.00	0.00	4.401.00	0.00	2.844.00	5.100.00	2.844.00	0.00	58.132.00

Supplier [1 / 2 / 11]

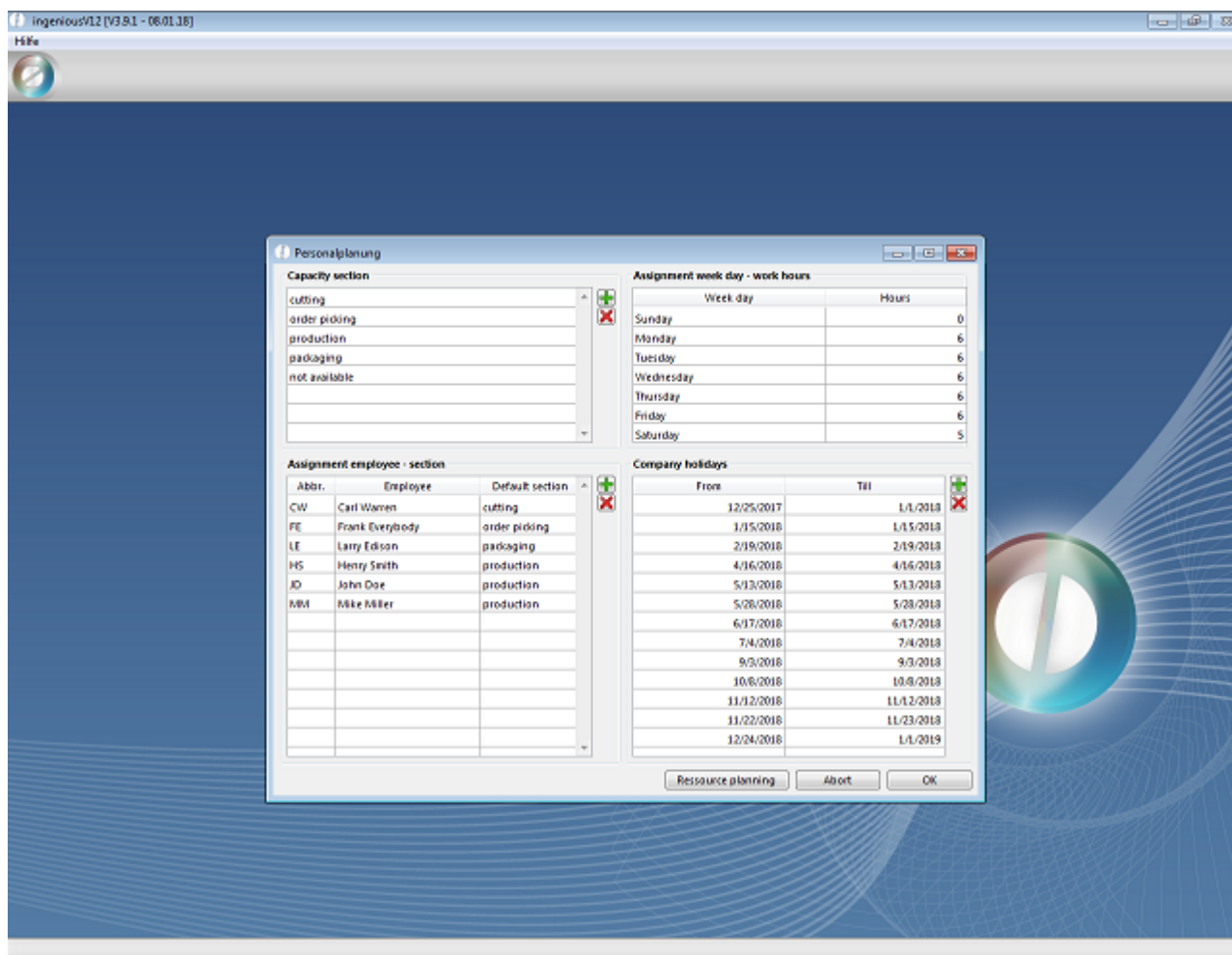


11.3.1.4 Extended capacity planning

Capacity planning can calculate the actual available maximum capacity on a daily basis instead of using static values. To determine these available times, the Resource planning was added.



Here you can manage centrally the different production areas, which correspond to individual capacity planning, the production staff, available working hours per day of the week and the company holidays.



Based on this data, you can switch to the resource planning board, where detailed planning takes place.

ingenious.V12 [V3.9.1 - 06.01.18]

Help

Personalplanung

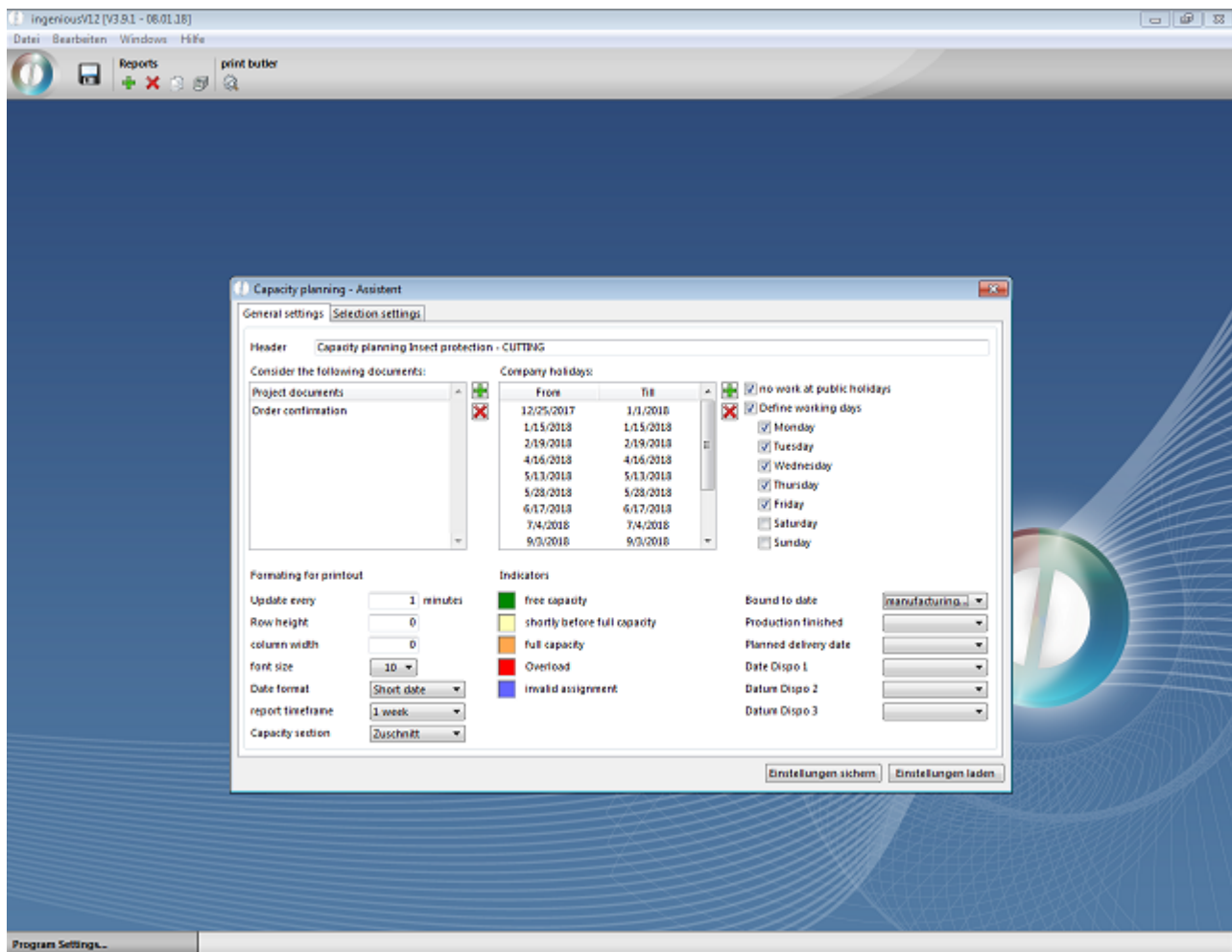
From: 01.01.18 to: 01.31.18

Buttons: [X] [OK] [Cancel]

Datum	Σ cutting	Σ order picking	Σ production	Σ packaging	Std / P / T	Carl Warren cutting	Frank Everybody order picking	Larry Edison packaging	Henry Smith production	John Doe production	Mike Miller production	Datum
01/01/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/01/18
01/02/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/02/18
01/03/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/03/18
01/04/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/04/18
01/05/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/05/18
01/06/18	5	5	15	5	5	cutting	order picking	packaging	production	production	production	01/06/18
01/07/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/07/18
01/08/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/08/18
01/09/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/09/18
01/10/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/10/18
01/11/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/11/18
01/12/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/12/18
01/13/18	5	5	15	5	5	cutting	order picking	packaging	production	production	production	01/13/18
01/14/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/14/18
01/15/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/15/18
01/16/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/16/18
01/17/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/17/18
01/18/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/18/18
01/19/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/19/18
01/20/18	5	5	15	5	5	cutting	order picking	packaging	production	production	production	01/20/18
01/21/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/21/18
01/22/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/22/18
01/23/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/23/18
01/24/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/24/18
01/25/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/25/18
01/26/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/26/18
01/27/18	5	5	15	5	5	cutting	order picking	packaging	production	production	production	01/27/18
01/28/18	0	0	0	0	0	cutting	order picking	packaging	production	production	production	01/28/18
01/29/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/29/18
01/30/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/30/18
01/31/18	6	6	18	6	6	cutting	order picking	packaging	production	production	production	01/31/18

Hereafter, the part lists have to be extended by help articles to the single production areas.

They have to be defined as time items. The capacity planning settings have to refer to these help articles. Additionally, the capacity section has to be selected.





ingenious.V12 [V3.8.1 - 06.01.18]

Datei Bearbeiten Windows Hilfe

Capacity planning


Datei Bearbeiten Anzeigen Einfügen Stil Werkzeuge Datenbank

100

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z AA

1 Capacity planning Insect protection - CUTTING

2		01/29/18	01/30/18	01/31/18	02/01/18	02/02/18	02/03/18	02/04/18	Sum CW05	02/05/18	02/06/18	02/07/18	02/08/18	02/09/18	Sum CW06
3	Item group														
4	Available employees	1	2	1	1	1	0	0	-	1	1	1	1	1	-
5	Work hours per employee	6	6	6	6	6	0	0	-	6	6	6	6	6	-
6	Available capacity in min	360	720	360	360	360	0	0	2160	360	360	360	360	360	1800
7	Needed capacity in min	95	615	345	295	50	0	0	1400	0	0	0	0	0	0
8	Rotating frame	0	0	150	0	0	0	0	150	0	0	0	0	0	0
9	ZIP	95	90	0	45	50	0	0	280	0	0	0	0	0	0
10	Sliding frame	0	525	0	250	0	0	0	775	0	0	0	0	0	0
11	Simple frame	0	0	195	0	0	0	0	195	0	0	0	0	0	0
12															
13															
14															
15															
16															
17															
18															
19															



 - Undercapacity

 - Near to full capacity

 - Full capacity

 - Overcapacity

 - invalid assignment (e.g. work-free day)

11.3.2 Enhancements 2017-2018

New Features

Automatic logout of inactive clients to release licenses	Logout inactive clients (Section 11.3.1.1)
Generic item export as CSV-file to FTP-server	Generic item-export (Section 11.3.1.2)
Statistics about supplier sales	Supplier-Sales-Analysis (Section 11.3.1.3)
Capacity planning according to actual resources	Extended capacity planning (Section 11.3.1.4)

New user rights

100.150 – Contacts – Create supplier statistic

550.665 – Special Functions – Ressource planning for capacity planning

New API methods

Tool_Update_ItemPicture

New method call for usage in the Free data manipulation

With this API method the flags „webshop“, „default picture“ and the description of item pictures can get updated.

Parameter:

1. Pointer to the data field, which has to be changed
2. New alphanumeric value – Boolean values are passed with “true” / “false”
3. [Produktkatalog]OID
4. (Optional, updates all connected item pictures if not submitted) [Produktkatalog_Bilder]OID

PPS_Finalize

New method call for usage in the Free data manipulation or in the Scheduler

With this API method all current PPS daily plans can be updated at once.

It could either be executed without any parameter, then all daily plans are updated, or with the ID of the daily plan to be updated.

Extension of the **Time_Log**

API method With the Time_Log the executions of scripts could be logged centrally. This can be used to monitor the call frequency and execution time of scripts.

- Activation of the protocol via an automatic script, that is executed on the “Client – Startup”-event:
<>TimeLogActive:=<>TimeLogActive+";SCRIPT_EXECUTED"
- Export of the protocol over the API method Time_Log ("EXPORT";"SCRIPT_EXECUTED")
- Clearing the protocol via API method Time_Log ("DELETE";"SCRIPT_EXECUTED")

Extension of **Tool_Update_Projekt**

Allows update of [Projekte]Notizen

Diverse minor enhancements

- Extension of the script event "Projects - Before Advance" for use in the function "Creation of collective invoices"
- Extension of the API method "PrintVar (" on measurement sheets to the second parameter "USER" to translate the output text into the current user language.
- Optimization of coloring of own sidebars in the detail views of the main modules
- The function "Price changing" can now also be executed completely without rounding the result
- Extension of the program settings: Do not use disabled items in part lists
- Extension of the program settings: Checking the maximum execution time of scheduler tasks and e-mail notification if exceeded
- Extension of SEPA Debit export: Collective debits allow the inclusion of credit notes to reduce the debited amount
- Extension of SEPA Debit export: Avis document can alternatively be sent directly by e-mail
- Print report "Contacts - sales statistics" extended by alternative sorting by postal code

11.3.3 Bugfixes 2017-2018

The following bugs of the program code were solved:

- CRM information per contact - correction of the selection of financial years
- Correction of the loading list - Handling a differing delivery address without reference in the additional addresses of the contact
- Scheduler - Correction of the calculation of the next execution for monthly tasks
- PPS with cutting optimization - Optimization of the calculation of daily plans with extremely many very small blanks
- B2B - Optimization of the export of project documents as a Word file with very long position texts


11.4 Annual update 2018 -> 2019

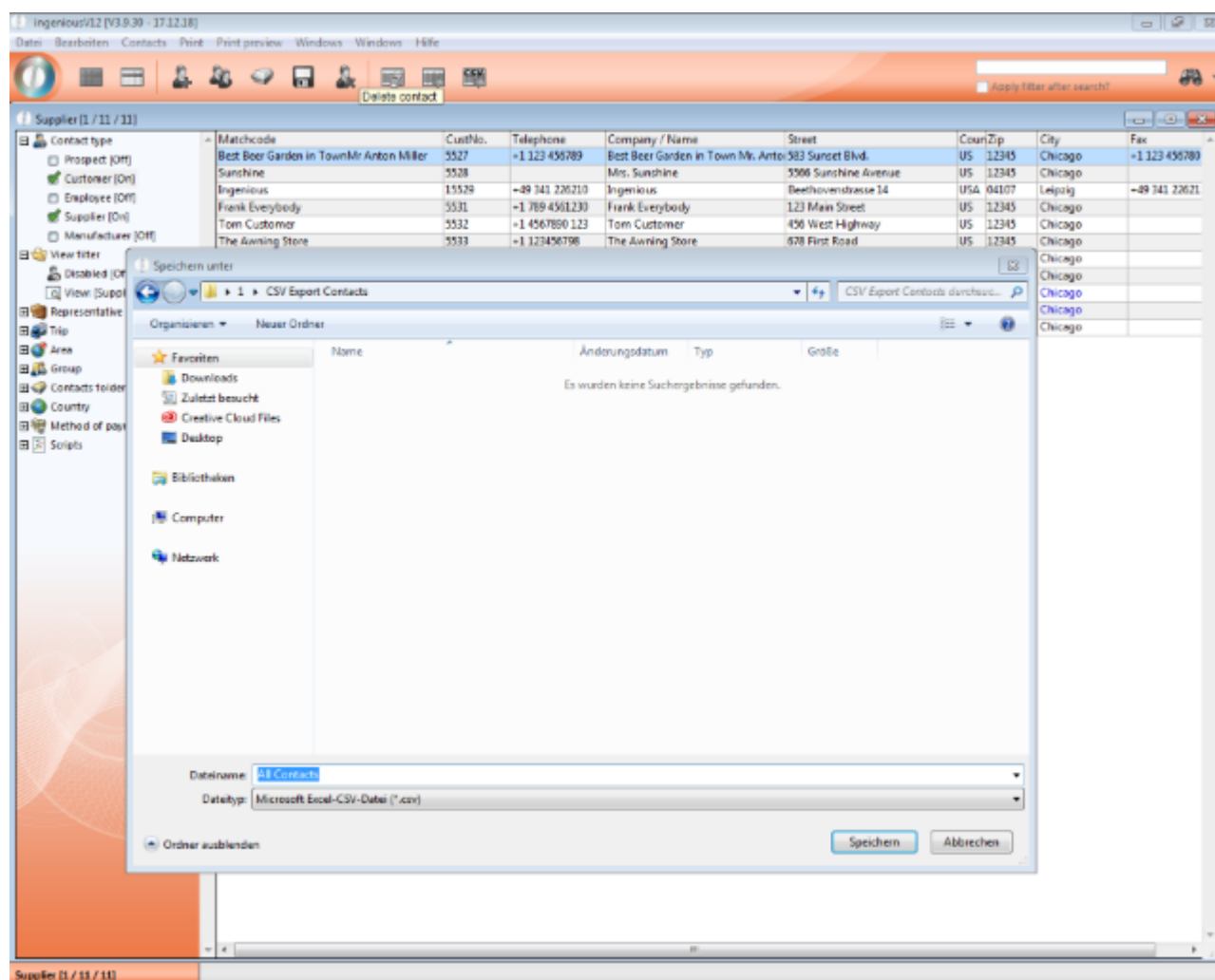
11.4.1 New features

11.4.1.1 CSV export of lists

The list csv export is an alternative to the Excel export, especially for exporting larger lists. Because at the csv export no formattings are exportet, it is less CPU-intensive and thus obviously faster. The function is available in the modules

- Contacts
- Items
- Projects
- Purchasing
- Receipt entry
- Time management

The Export is started with the button  of the icon bar. After selecting which data records shall be exported (all displayed or all selected), the save dialogue appears, where save location and file name are defined.




The exported list will be opened with the standard program for csv-files. For the most users this is Microsoft Excel. The list can be edited here as desired.

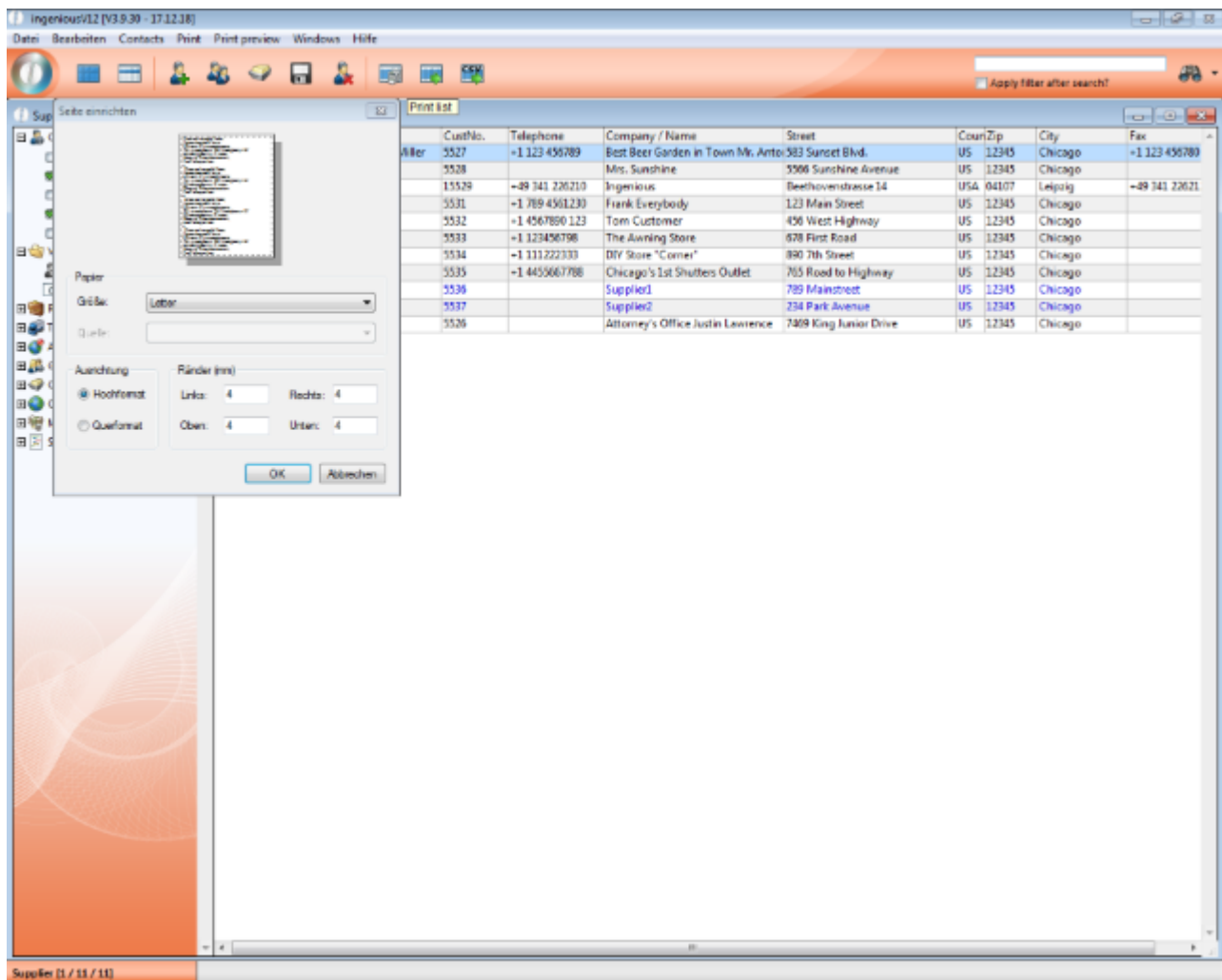
Best Beer Garden in TownMr Anton Miller								
A	B	C	D	E	F	G	H	I
1 Best Beer Garden in TownMr Anton Miller	5527 +1 123 456789	Best Beer Garden in Town Mr. Anton Miller	583 Sunset Blvd.	US	12345 Chicago	+1 123 456789		
2 Sunshine	5528	Mrs. Sunshine	5566 Sunshine Avenue	US	12345 Chicago			
3 Ingenious	15529 449 341 226210	Ingenious	Beethovenstrasse 14	USA	4107 Leipzig	+49 341 2262120		
4 Frank Everybody	5531 +1 789 4561230	Frank Everybody	123 Main Street	US	12345 Chicago			
5 Tom Customer	5532 +1 4567890 123	Tom Customer	456 West Highway	US	12345 Chicago			
6 The Awning Store	5533 +1 123456798	The Awning Store	678 First Road	US	12345 Chicago			
7 DIY Store Corner	5534 +1 111222333	DIY Store "Corner"	890 7th Street	US	12345 Chicago			
8 Chicagos 1st Shutters Outlet	5535 +1 4455667788	Chicago's 1st Shutters Outlet	795 Road to Highway	US	12345 Chicago			
9 Supplier1	5536	Supplier1	789 Mainstreet	US	12345 Chicago			
10 Supplier2	5537	Supplier2	234 Park Avenue	US	12345 Chicago			
11 Lawrence	5526	Attorney's Office Justin Lawrence	7469 King Junior Drive	US	12345 Chicago			
12								
13								
14								
15								
16								
17								
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22								
23								
24								
25								
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27								
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45								

11.4.1.2 Print list views

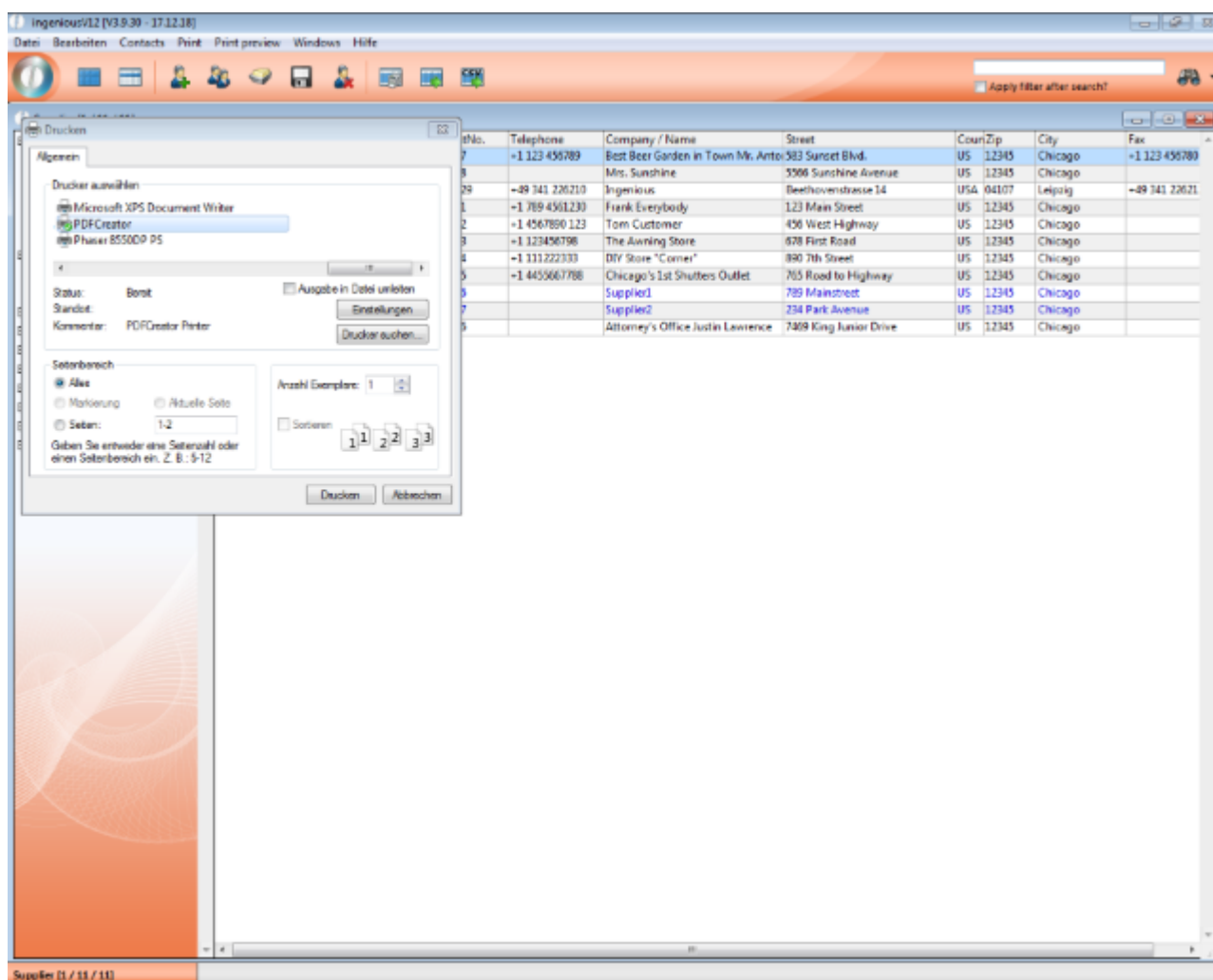
Simple list views of the modules

- Contacts
- Items
- Projects
- Purchasing
- Receipt entry
- Time management

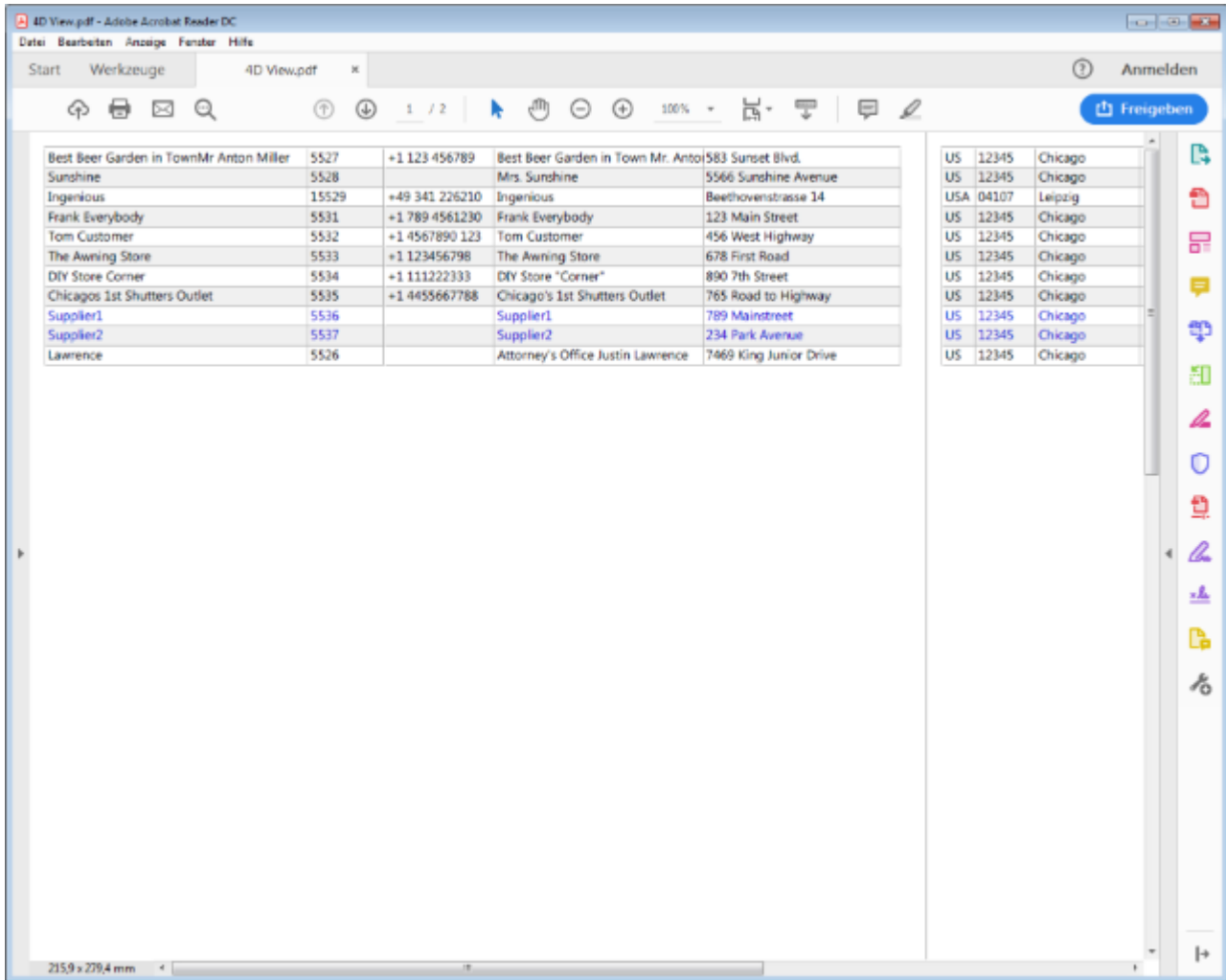
can be printed by clicking the new button . When printing takes place first the query, in which paper size, in which orientation and with which page margins to be printed. Here, the number of columns in the list should be considered, so that later everything is easy to read.



Afterwards, the printer will be selected and further print settings made if necessary.



Columns that do not fit on a printed page are distributed to other pages.



11.4.1.3 Enhancements of data optimization

Data optimization in the program settings allows a large number of project documents and linked data to be archived, compressed or deleted.

See also **Data optimization (Section 6.1.16)**

The data optimization has been extended by three useful points.

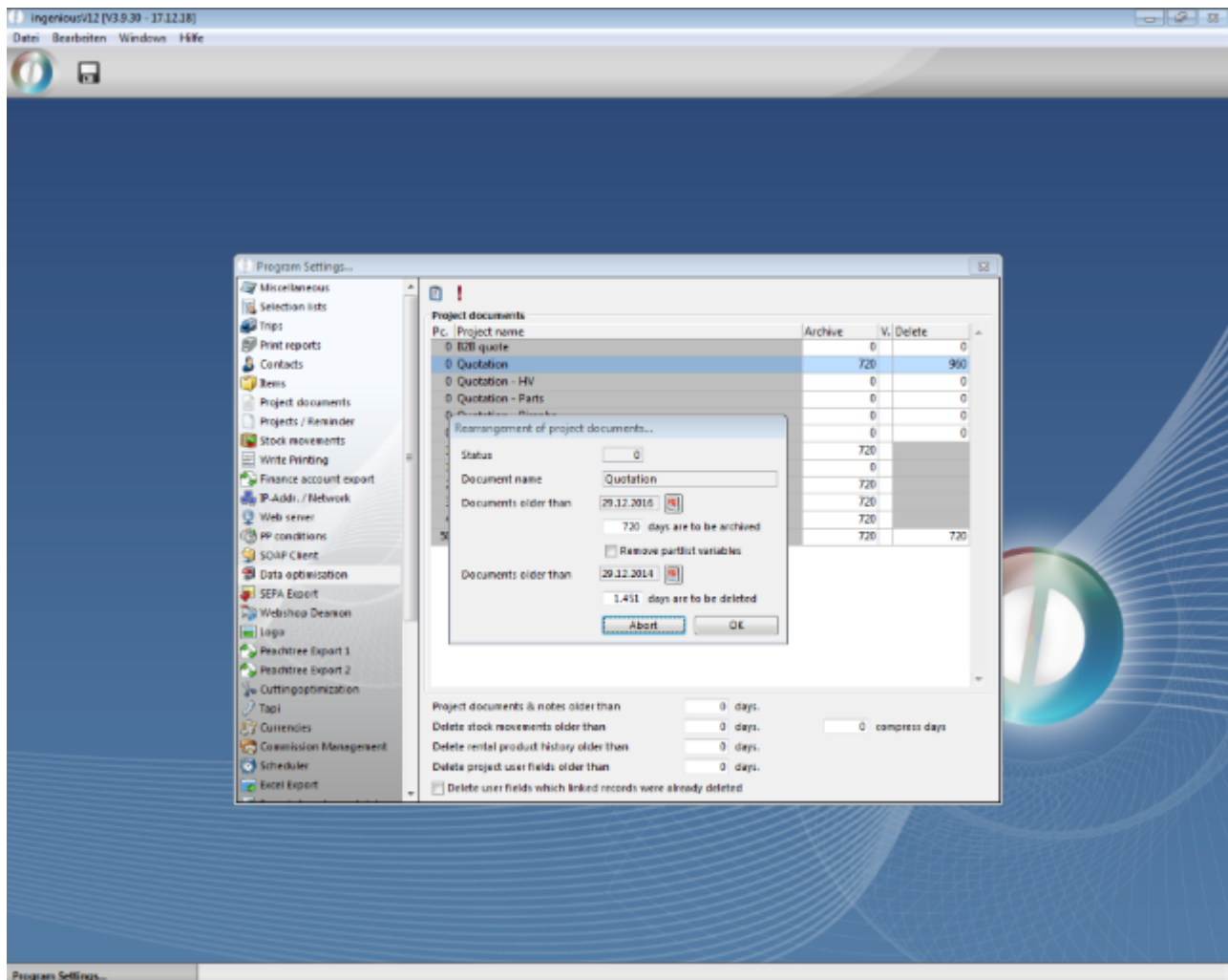
1. All project documents

Calling project documents that can be reorganized now also takes into account documents (project names) that are no longer configured in the program settings but appear in the project documents (for example, documents whose names were changed manually in the project).

2. Date selection

Previously, a number of days had to be entered for archiving or deleting records. All records older than this number of days have been deleted. This mode of operation is still available. In addition, a concrete date can now also be entered or selected using the calendar tool. The number of days is calculated automatically. This works the other way too, from the entered number of days, the date is calculated, from which all older documents and data are reorganized.

To configure the date or the number of days, double click on the project name or click on the button to open the form for the selected project document.




3. Collected configuration

Via the button, the archiving and deletion options can be set for a selection of project documents of the same status.

4. User fields

By deleting projects or subsequently, user fields can be deleted whose linked data records (projects) have been deleted.

In addition, user fields can be deleted independently of deleting the linked project records. To do this, enter the number of days from which older user fields should be deleted.

The reorganization is started with the button .

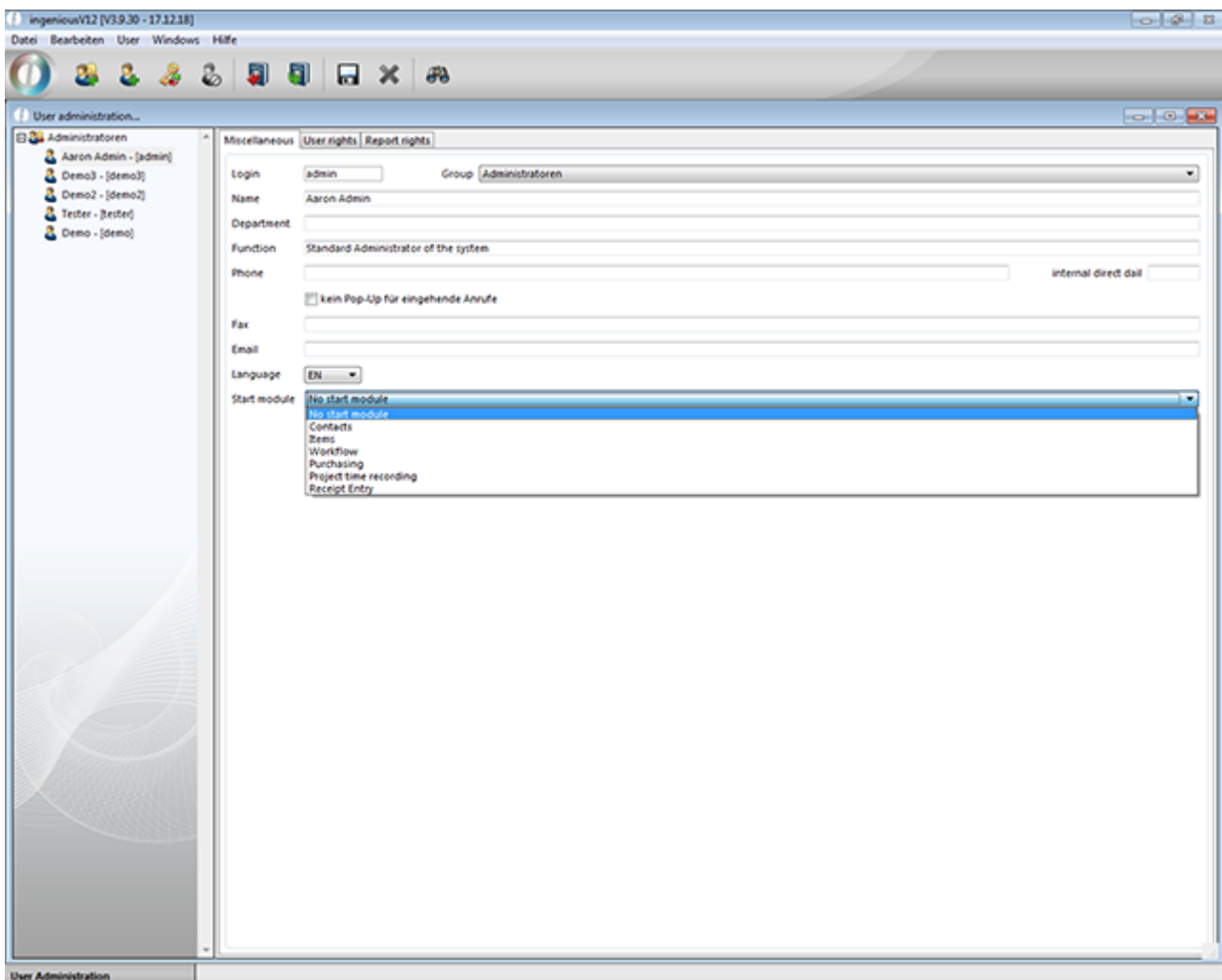
11.4.1.4 Start module

In the user administration it can be defined for each created user, which module should be opened with the program start.

The following modules are selectable:

- Contacts
- Items
- Workflow
- Purchasing
- Time management
- Receipt entry

By default, no module is started and instead the main menu of ingenious.V12 is displayed.



11.4.1.5 Upgrade-Check

Is your data ready for ingenious.basic?

With the new module "Upgrade-Check" (in the main menu under Miscellaneous) we provide you with a tool with which you can easily determine the extent of customization of your installation.

Six tabs clearly list the most important customizations:

- Modules and features
- Text templates
- Print reports
- Stored procedures
- Automatic procedures
- Part lists

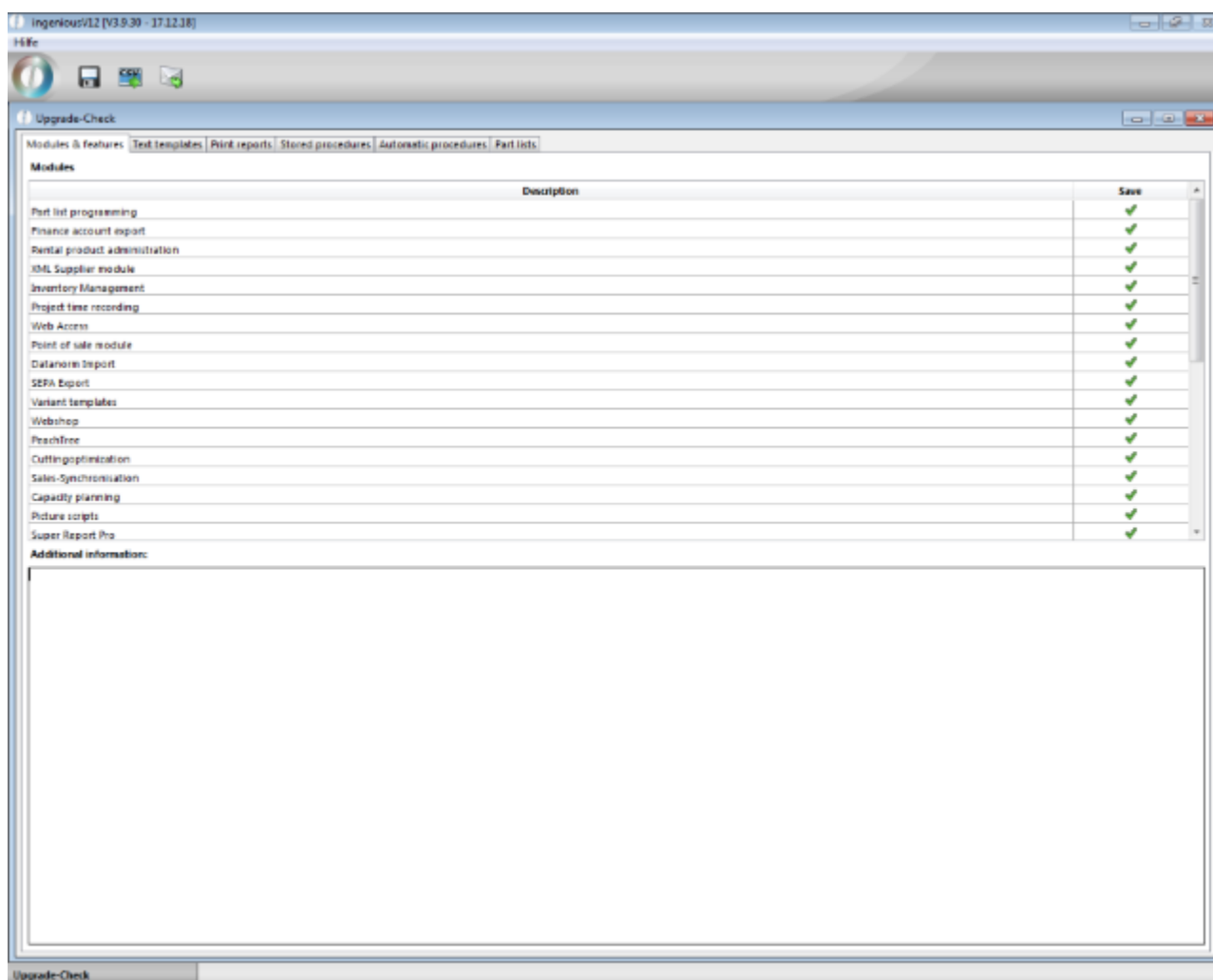
All objects stored in the database are collected. These are both currently used, but can also be old, no longer used. This will allow you to detect even data corpses and clean them up as part of a general maintenance or as part of upgrading your installation to ingenious.basic.

For each group, the individual entries can be accepted or excluded. Apply means in the sense of the upgrade check that the objects should be transferred to the new ingenious.basic software. For general maintenance, it simply serves to mark important objects that are currently in use. Objects with the cross are no longer needed (in ingenious.basic).

The individual tabs can be gone through step by step and the respective intermediate state can be saved by a button.

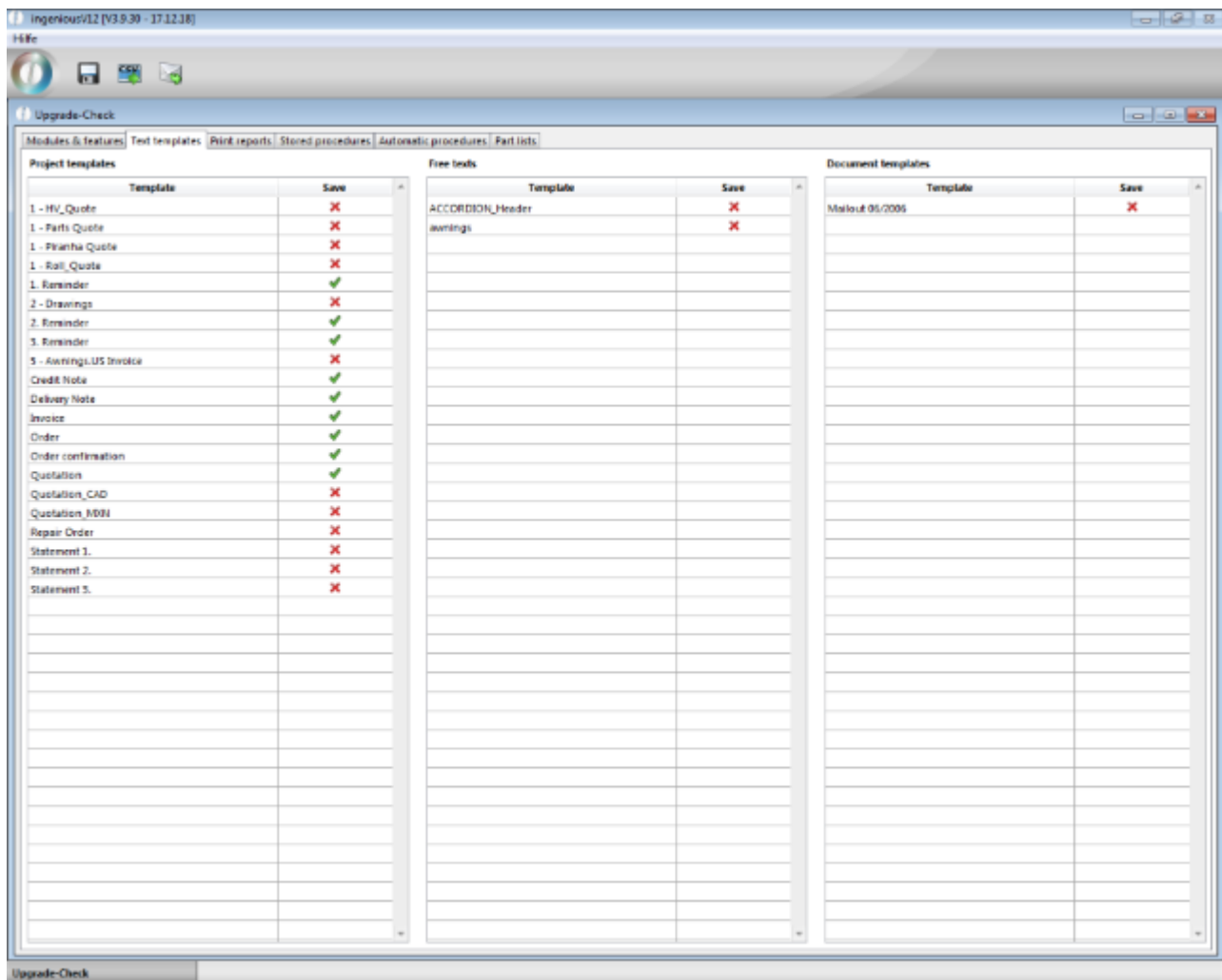
Modules & Features

In the modules and features all license-bound ingenious.V12 modules are listed. The modules included in your license are already marked with a green tick and marked for acceptance. You can also exclude individual modules and also select them. You can also save general additional information or notes here, e.g. also comments about modules and features that were developed especially for you.



Text templates

The tab Text modules lists all project templates, free texts and document templates of the database. The system modules are not listed, as they are no longer maintained separately in ingenious.basic, but are defined directly on the project templates.



Print reports

The print reports list all the reports stored in the database. This includes own print reports such as labels, super reports, HMReports, article statistics, simple reports, etc. as well as dedicated reports that are inherently included in ingenious.V12. Flag all of the takeover you are using.

Ingenious V12 [V3.9.30 - 17.12.18]

Help

Upgrade-Check

Modules & features | Text templates | **Print reports** | Stored procedures | Automatic procedures | Part lists

ID	Type	Description	attributes	Save
290.000	Fixed reports	4545 Vertrieb - Allgemein	357 Methodenname	✗
300.000	Fixed reports	296 Produktion - Allgemein	357 Methodenname	✗
300.002	Part list labels	Production - Label Accordion	Accord@	✗
300.100	Fixed reports	398 Produktion - Auftragsbestand	PrintG_Pj_Auftragsbest	✗
300.110	Quick report files	Installation Schedule	Installation Report.4QR	✗
300.111	Quotations / Orders / Invoices	Capacity planning		✓
300.112	Product statistic	Product Statistics		✓
300.115	Part list labels	Label - Shutter	@_Label_@	✓
300.116	Part list labels	Label - Package	@_Package_@	✓
300.120	Quick report files	Remesure Report	Remesure Report.4QR	✓
300.130	Quick report files	Production Report	Production Report.4QR	✓
300.140	Quick report files	Service Call Report	Service Call Report.4QR	✓
300.150	Quick report files	Commission Report	Sales_Commission_Report.4QR	✓
300.160	Quick report files	Open Sales Quotation Report	Open Sales Quotation Report.4QR	✓
300.180	Measurement sheets	Accordion - Shop Drawing	HV Accordion - Shop Drawing	✗
300.200	Fixed reports	400 Produktion - Stueckliste je Auftragsposition	PrintG_Pj_StuK_pos	✗
300.250	Quotations / Orders / Invoices	Production - Capacity planning IP		✗
300.300	Fixed reports	402 Produktion - Stueckliste je Positionsgruppe	PrintG_Pj_StuK_posGruppe	✗
300.400	Fixed reports	404 Produktion - Stueckliste mehrerer Auftragspositionen	PrintG_Pj_StuK_posMehrere	✗
300.500	Fixed reports	406 Produktion - Stueckliste je Projekt und Positionsgruppe	PrintG_Pj_StuK_posPP	✗
300.510	Fixed reports	3052 Produktion - Stueckliste je Auftragsposition mit Preisen	PrintG_Pj_StuK_pos_RKT	✗
300.520	Fixed reports	3054 Produktion - Stueckliste je Positionsgruppe mit Preisen	PrintG_Pj_StuK_posGruppe_RKT	✗
300.600	Fixed reports	2907 Produktion - EK-Liste je Projekt	PrintG_Pj_ListeEK	✗
300.605	Fixed reports	5254 Produktion - VK-Liste je Projekt	PrintG_Pj_ListeVK	✗
300.650	Part list labels	Production - part list labels	US_PartList_Label.4LS	✗
300.700	Consignment labels	Production - Kommissionsetiketten	Kommissionsetikett.4LS	✗
300.702	Fixed reports	2956 Produktion - Materialverbrauch je Projekt	PrintG_Pj_Materialverbrauch	✗
300.750	Fixed reports	3733 Produktion - Flexible Produktionsberichte mit Datumsauswertung	PrintG_Pj_Datumsauswertung	✗
400.000	Fixed reports	403 Logistik - Allgemein	Methodenname	✗
400.100	Fixed reports	410 Logistik - Tourenliste	PrintG_PjL_Tourenliste	✗
400.200	Fixed reports	412 Logistik - Lieferketten zu Projekten	PrintG_Lieferketten	✗
400.300	Fixed reports	414 Logistik - Sammellieferketten	PrintG_Sammellieferketten	✗
400.400	Fixed reports	416 Logistik - Arbeitsaufträge zu Projekten	PrintG_Arbeitsauftrag	✗
400.500	Fixed reports	418 Logistik - Ladeliste TNT	PrintG_Ladeliste_TNT	✗
400.600	Fixed reports	3059 Logistik - Touren Prioritäten verwalten	Proc_TOUR_MANAGE_ORDER	✗
401.200	Loading figures	Ladeseinleitung		✗
500.000	Fixed reports	420 Faktura - Allgemein	357 Methodenname	✗
500.001	tesReports	Invocing - E-Sheets	E-Sheets.4thm	✗
500.100	Fixed reports	422 Faktura - RG-Ausgang	PrintG_Pj_RG_Ausg	✗

Upgrade-Check

Stored procedures

The stored procedures are separate scripts that e.g. contains special searches, or lists of values for use in part lists or also serves for formattings and text creation on documents. For each script it is marked to which list view it is assigned, as far as that is true.



Automatic procedures

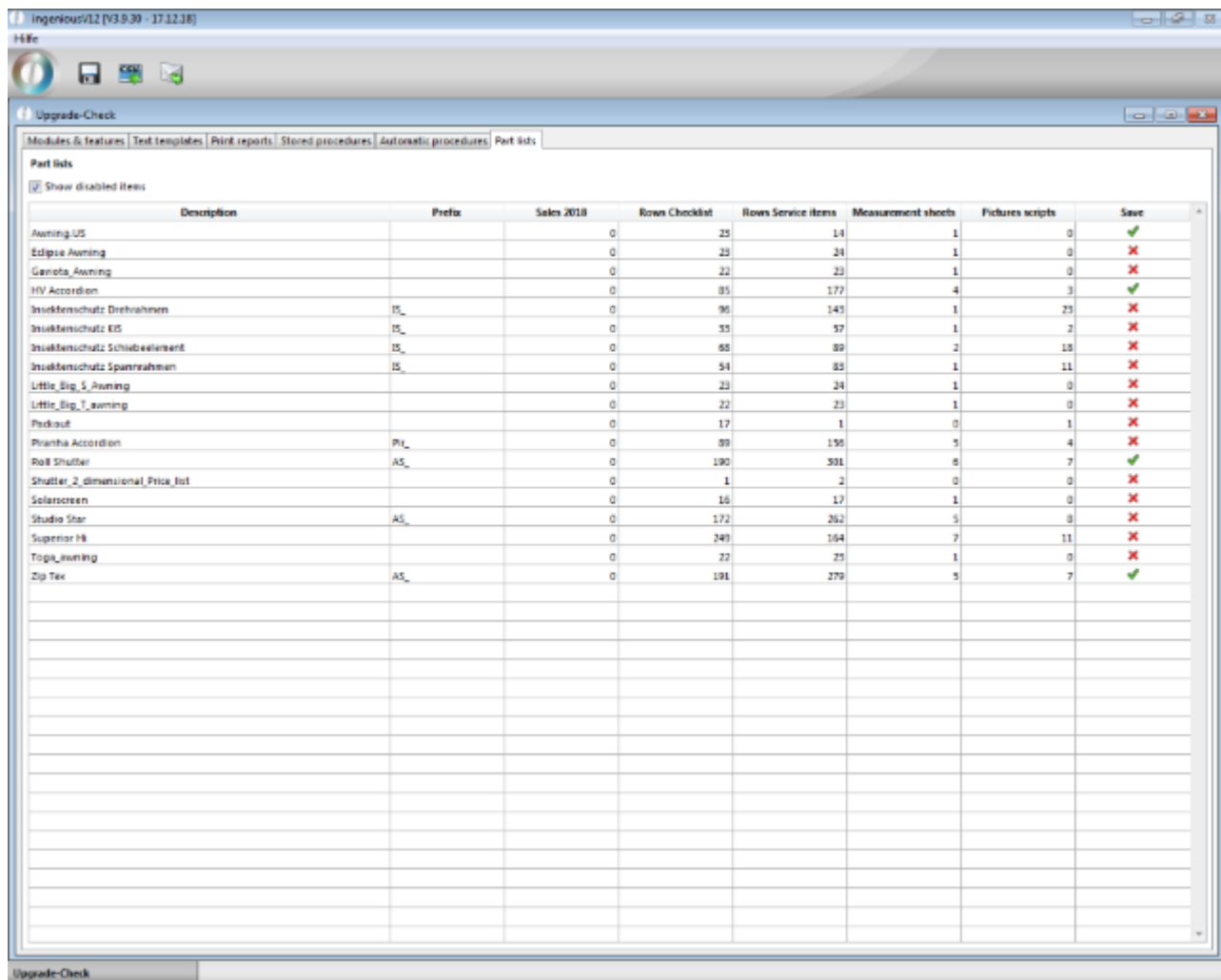
The automatic procedures are the scripts that are automatically executed with an action, e.g. when opening a contact record. By marking the linked action, it is easy to see which scripts are currently being used.

Description	Save	Items search web	Contacts open	Contacts save	Contacts open web	Contacts save web	Contacts search web	Projects create
Contact_Open fix source	✗		✓		✓			
Contact_Open new	✗		✓		✓			
Contact_Open Web	✓				✓			
Contact_Save	✓			✓		✓		
Contact_Open	✓		✓		✓			
Contacts_search_unwww	✗						✓	
Contacts_sidebar	✓		✓					
Parts_search_unwww	✗	✓						
Projects_Open	✓							✓
Projects_Open_unwww	✗							
Projects_save - count shutters	✗							
Projects_save_unwww	✗							
Projects_search_unwww	✗							
Projects_sidebar	✗							
unwww-open-global-variables	✗							

Part lists

The part lists tab lists all items for which service items, measurement data, and / or type attributes have been created. These articles in general are compatible with ingenious.basic and can be continuing used in the new software. However the complex logic within the part lists require a more thorough review of the correct syntax, especially if the part lists were not created by Ingenious or were later modified. Also possibly necessary smaller adjustments on measurement sheets and picture scripts will be made in this context.

The determined values for the number of lines, measurement sheets and picture scripts reflect the scope of a parts list and at the same time serve to calculate the effort of the upgrade.



The screenshot shows the 'Upgrade-Check' window in the ingenious.V12 software. The window has a menu bar with 'Modules & features', 'Text templates', 'Print reports', 'Stored procedures', 'Automatic procedures', and 'Part lists'. The 'Part lists' tab is active, and a checkbox 'Show disabled items' is checked. Below the menu bar is a table with the following columns: Description, Prefix, Sales 2018, Rows Checklist, Rows Service items, Measurement sheets, Pictures scripts, and Save. The table contains 18 rows of data, each representing a different item or feature. The 'Save' column contains green checkmarks or red X's, indicating the status of each item.

Description	Prefix	Sales 2018	Rows Checklist	Rows Service items	Measurement sheets	Pictures scripts	Save
Awning US		0	25	14	1	0	✓
Eclipse Awning		0	25	24	1	0	✗
Ganote_Awning		0	22	23	1	0	✗
HV Accordion		0	35	177	4	3	✓
Insektenschutz Drehrahmen	IS_	0	96	145	1	23	✗
Insektenschutz EIS	IS_	0	55	57	1	2	✗
Insektenschutz Schiebeklement	IS_	0	68	89	2	18	✗
Insektenschutz Spannrahmen	IS_	0	54	85	1	11	✗
Little_Big_S_Awning		0	23	24	1	0	✗
Little_Big_T_Awning		0	22	23	1	0	✗
Pickout		0	17	1	0	1	✗
Pranthe Accordion	PI_	0	89	156	5	4	✗
Roll Shutter	AS_	0	190	501	6	7	✓
Shutter 2 dimensional Price list		0	1	2	0	0	✗
Solarscreen		0	16	17	1	0	✗
Studio Star	AS_	0	172	262	5	8	✗
Superior H8		0	249	164	7	11	✗
Toga_Awning		0	22	23	1	0	✗
Zip Tex	AS_	0	191	279	5	7	✓

After completion of the sifting of all objects and selection of those to be accepted, this summary can be exported to csv files and / or sent by email to Ingenious.

Store in csv files

By clicking on the button, the storage of the current settings in csv files is initiated. The directory for filing the files is selected via the Windows Save dialog. Since unzipped single files are created, it is recommended to create an extra folder for the files. The files can be archived for documentation during internal maintenance. Or, if the files are used to prepare the ingenious.basic upgrade, they can be sent to Ingenious.

Send the summary by email

If all objects to be transferred have been marked, the summary can be sent directly to Ingenious by email to estimate the upgrade effort. Via the button, a new email is created in the mail client with the csv files as an attachment and can be sent to ingenious with further notes or comments.

11.4.2 Enhancements 2018-2019

New features

Export list vies of the main modules into a csv file	CSV export of lists (Section 11.4.1.1)
Print list views of the main modules	Print list views (Section 11.4.1.2)
Additional options for the data optimization	Enhancement of data optimization (Section 11.4.1.3)
Definition of a start module per user	Start module (Section 11.4.1.4)
Tool to check the degree of customization of the installation and of its topicality	Upgrade-Check (Section 11.4.1.5)

New API-Methods

- vbRecalcItems:=true / EXEC_onPrjConvert -> Enforces the recalculation of the project items when converting a project

New script events

- Automatic script event: Production planning - Finalize planning
- Variable vbHardLocked, that's activated by script to completely open a project document in the read-only mode

Diverse minor enhancements

- PPS cart distribution, optionally allocate all cuts to a workstation per project afterwards
- Mass operation to allocate items to additional directories
- Program settings - New category of file attachments in the selection lists, additional category field for each file attachment
- Standardization of the menu and handling of the measurement line with the alternative, optional and post calculation items -> Switch between measurement line and PosP over the menu
- New patterns for objects in picture scripts (G1 to G12 and Fill:{picture name}, Tile:{picture name}) after updating the Canvas plugin

11.4.3 Bugfixes 2018-2019

The following bugs in the program code were fixed among others:

- Bugfix Items "Edit variants"

11.5 Annual Update 2019 -> 2020

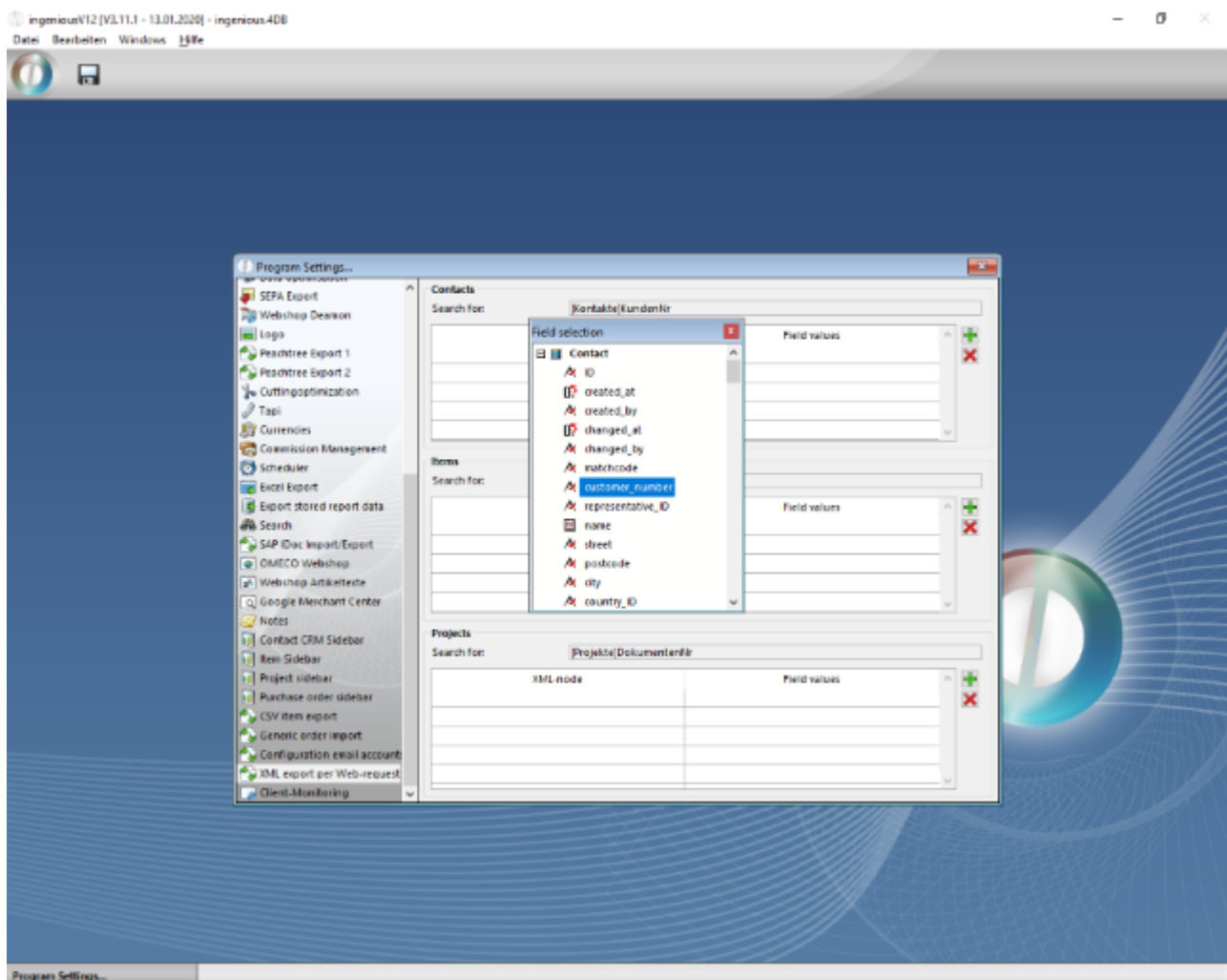
11.5.1 New features

11.5.1.1 XML export via web request

An interface is available for the export of article, contact and project data records for further use in web applications, which is configured once in the program settings and started via a web request.


A separate configuration area is available for each of the 3 possible modules.

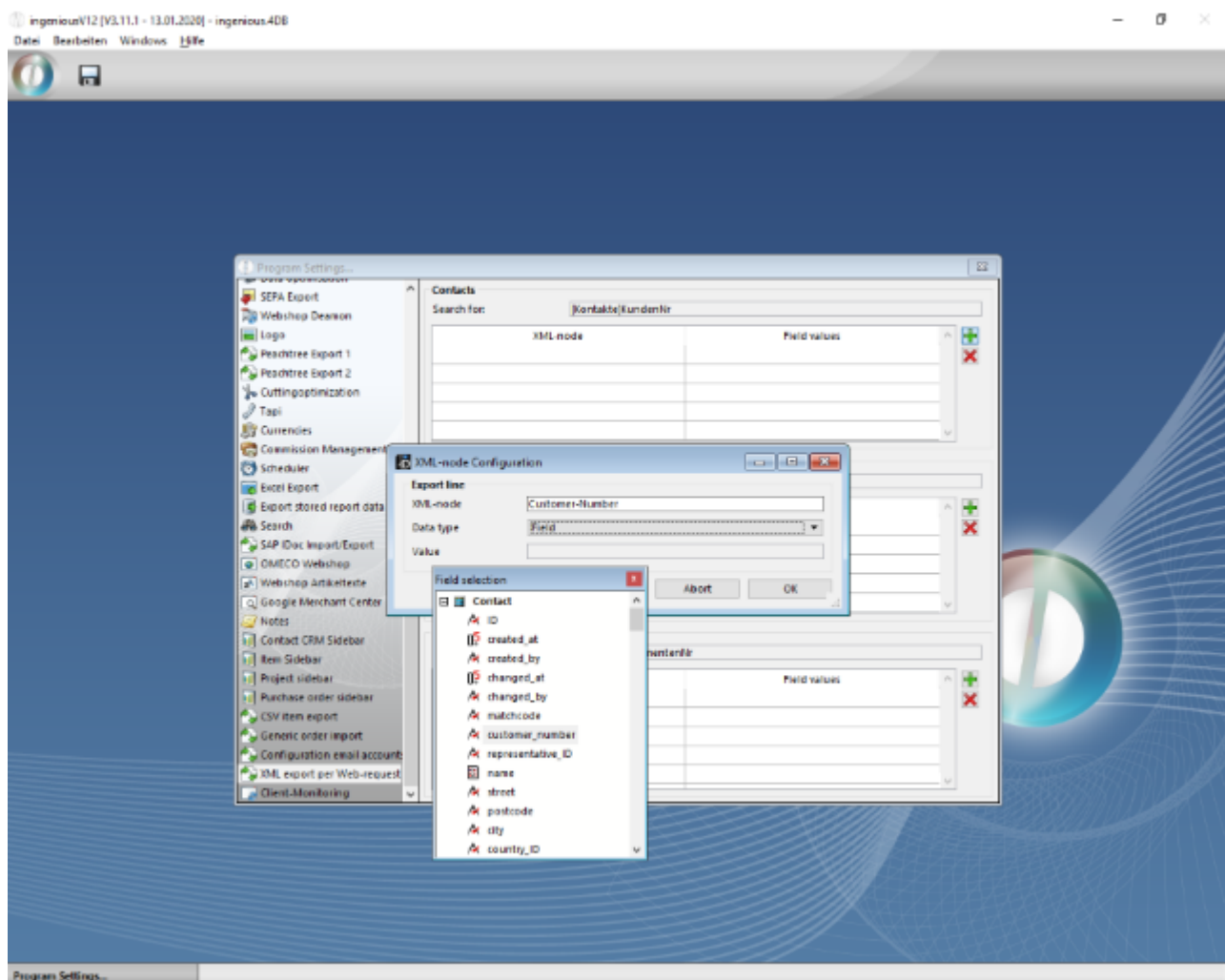
A database field is defined for the search via web request. The search string can contain so-called wildcards, "*" or "@" are possible. The exported data records are also sorted according to this field. Double-clicking on the "Search for" field opens the field selection via which the desired field can be selected.



The scope and content of the XML output file can be freely defined. The XML nodes can be freely named according to the requirements of the external application and can contain fixed values, database fields, formulas and user fields (via a formula).

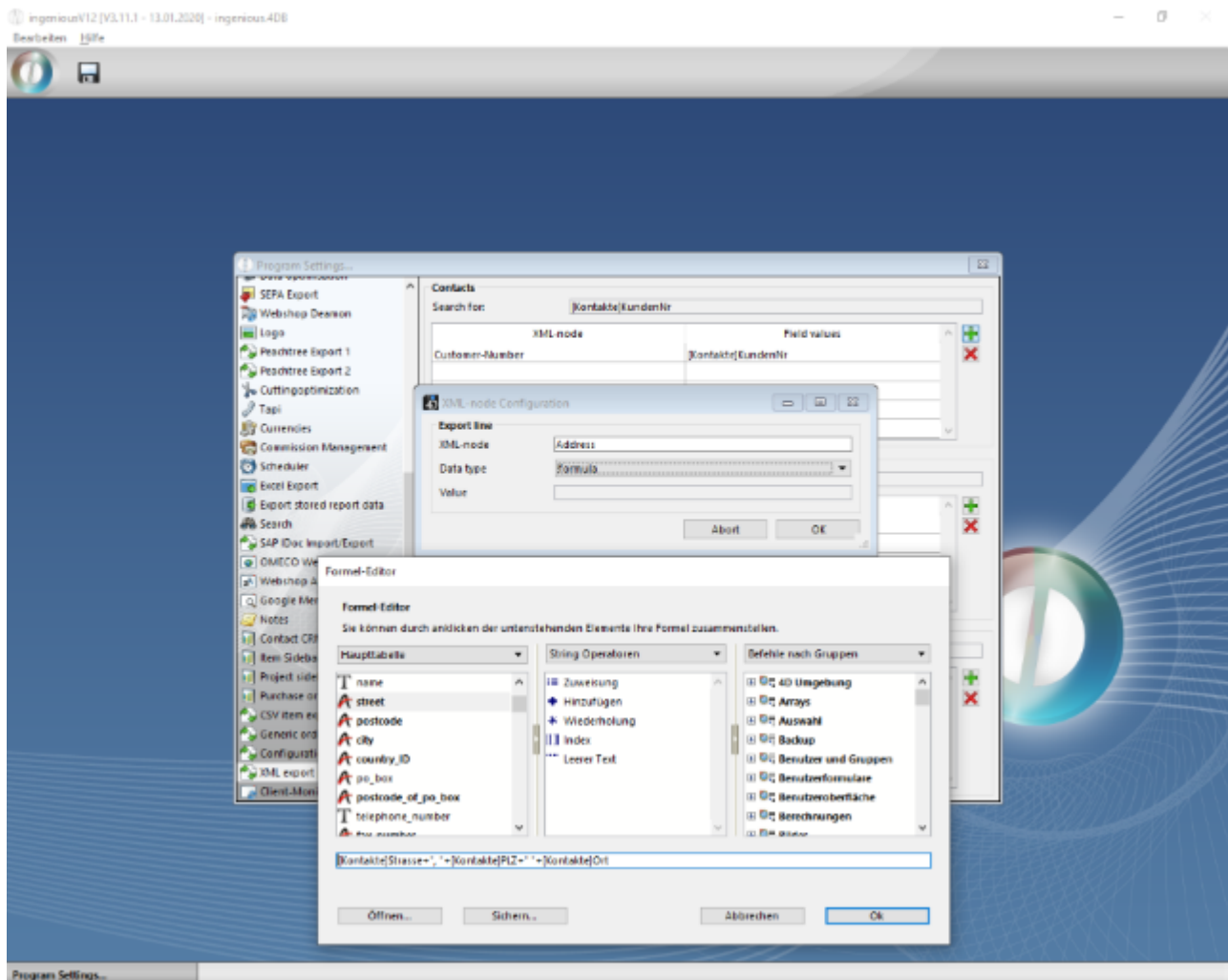
XML node	Output value
fix	abc
field	[Kontakte]KundenNr
formula	[Kontakte]Strasse+", "+[Kontakte]PLZ+" "+[Kontakte]Ort
user_field	BF_GetText ([Kontakte]OID;"ContactStatus")

A new node is created via the  Button. Double-clicking on the line opens an editor with which the name of the node and the data type can be selected. A fixed value can be written directly into the corresponding field. To use a field or formula, double-click on the "Value" field to open another dialog.

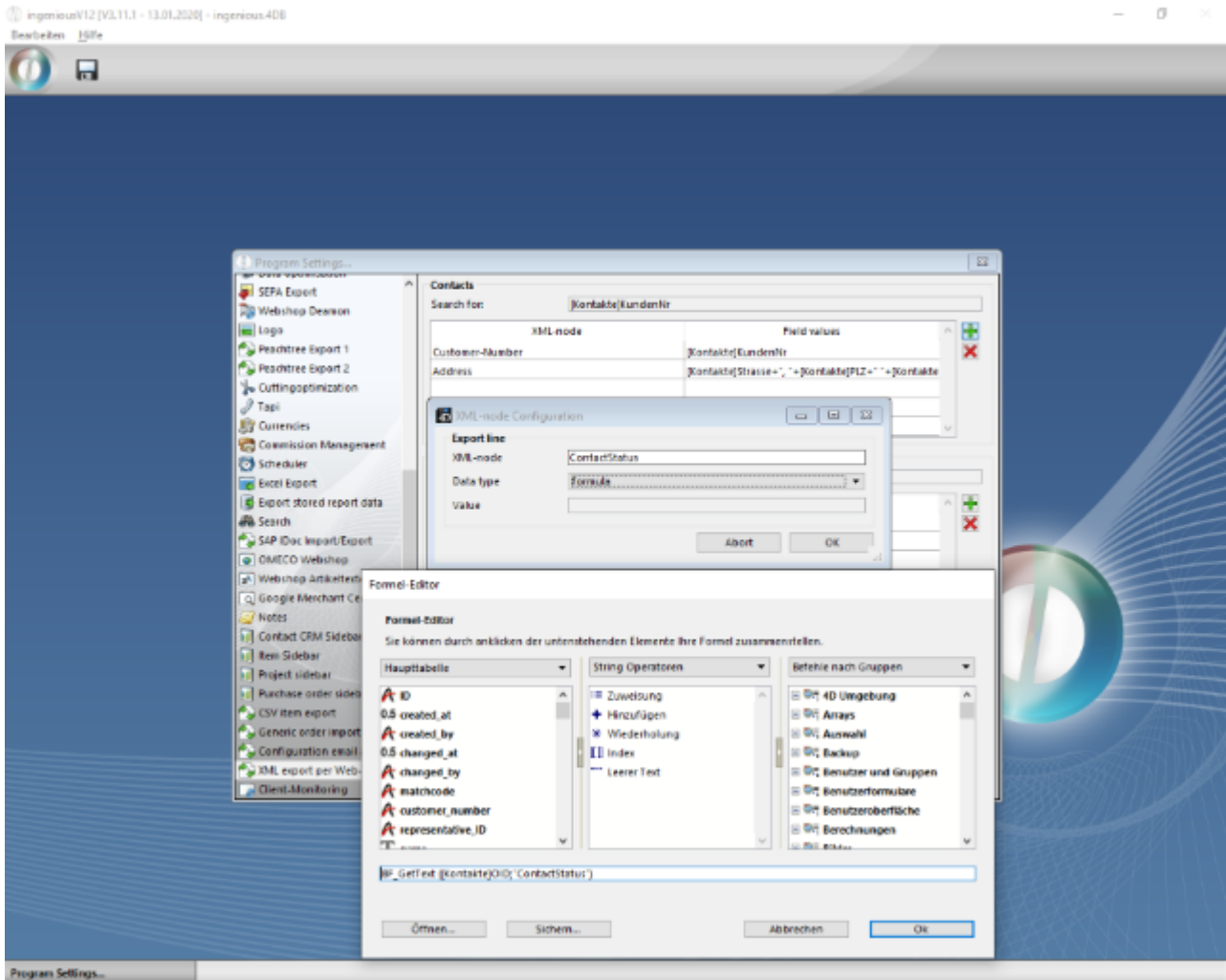


Single-line formulas are possible within an XML node. More complex formulas must be created using a script and

inserted using 'EXEC_Script ({script_name} {; param1 {; param2;...}})'



User fields are loaded via the API function 'BF_GetText ({record-ID}; {user field name})'.



To change an XML node, double-click on the corresponding line. An XML node is deleted using the button .

Web call

The web call is started via the URL {ingenious.V12 webserver}/xml_export&module={module}&select={searchstring}. {ingenious.V12 webserver} stands for the web address or IP of your own web server.

The module in which the search is to be carried out is entered for {module}.

- KON - for contacts
- ART - for articles
- PRJ - for projects

The search term must be entered for {searchstring}. This can contain the wildcards "*" and "@", which stand for unknown characters in the search term.

The web call generates an XML with the following structure:

Web call XML

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
```

```
<xml_export records="{Number of exported data records}">
<record num="{Data record counter}">
<{Generic XML node 1}>
{Exported value 1}
</{Generic XML node 1}>
<{Generic XML node 2}>
{Exported value 2}
</{Generic XML node 2}>
{ ... }
</record>
{ ... }
```

11.5.1.2 Projects XML export and import

For the exchange between 2 ingenious.V12 databases, project documents including linked information such as positions, project addresses, history, payments, documents & dates, file attachments, inventory postings, order picking, document assignment and user fields can be exported and imported in XML format. The inventory of the items linked to the imported items is then updated.

Export

The API Tool_XML_Export_Projects can be started with 3 optional variables:

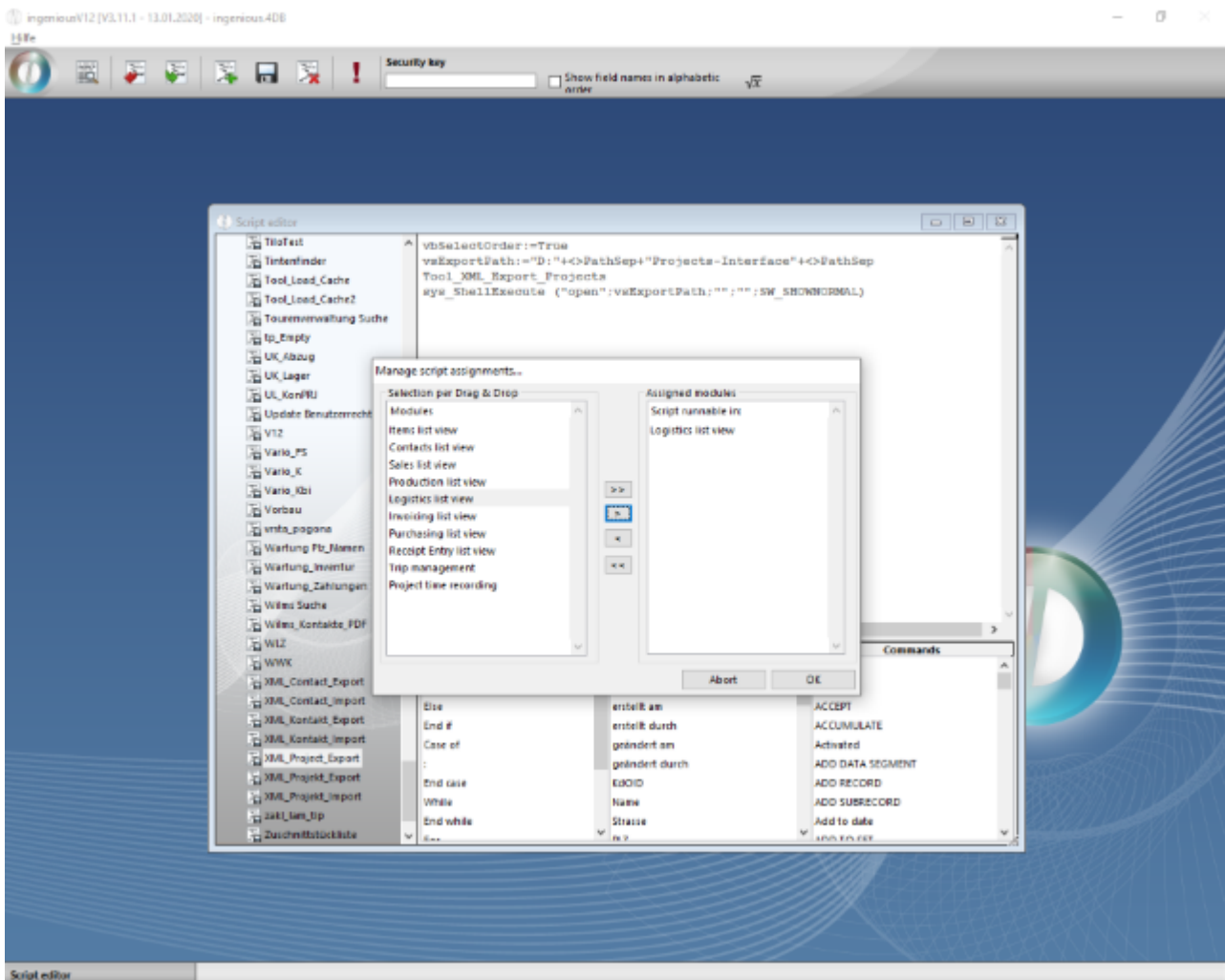
vbSelectOrder	:=True	The selection of the projects to be exported is determined from the project list. To do this, the script must be run from a project list.
	:=False	The selection of the projects to be exported must be defined in the script.
vsExportPath	:= ""	When exporting, the user is asked to select the export directory manually
	# ""	Specification of the target directory for the export
vbExportPartListVersions	:=True	Partlists versions are exported
	:=False	Partlists versions are not exported

1. Export of manually selected projects

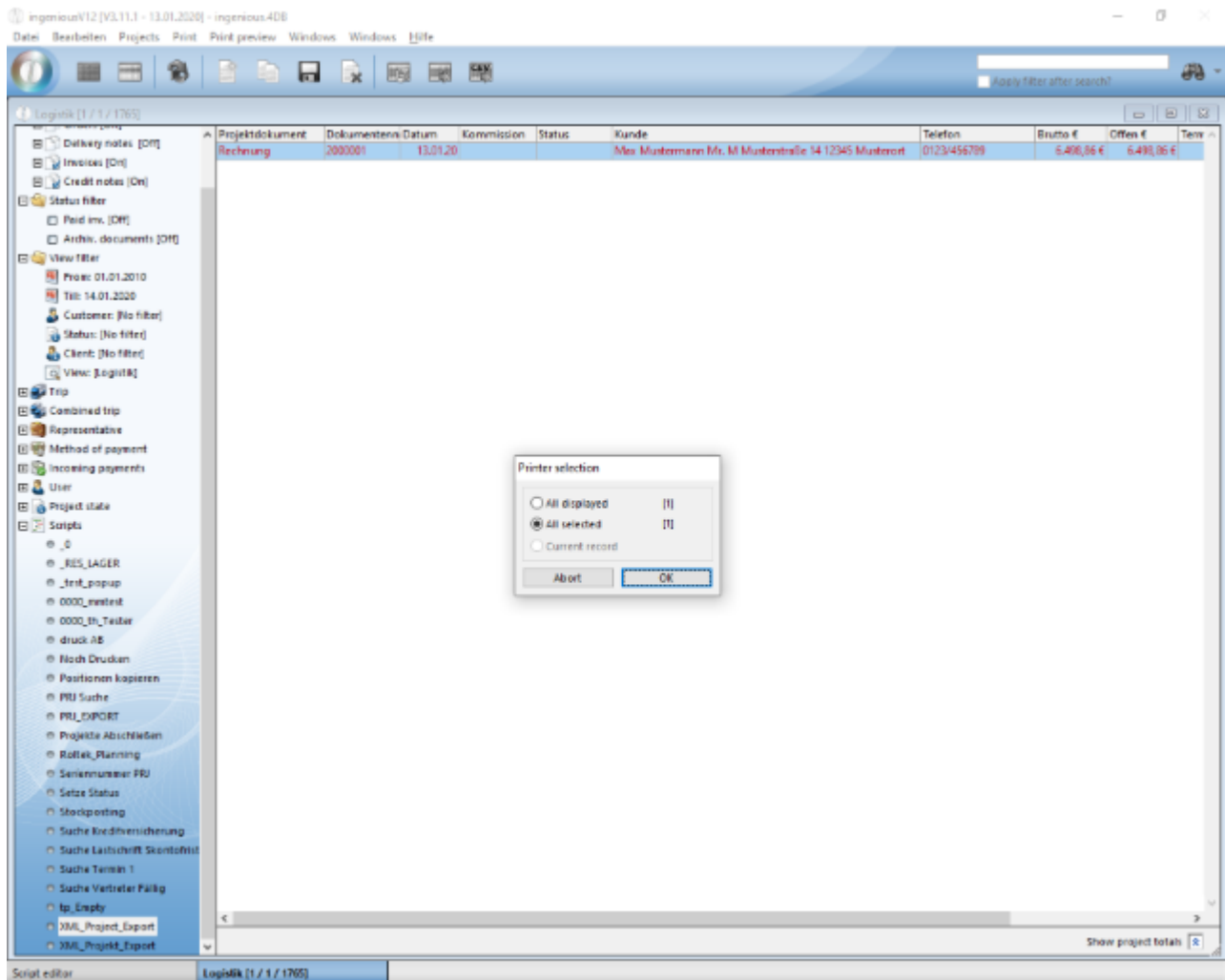
Export of manually selected projects

```
vbSelectOrder:=True
vsExportPath:="D:" + <> PathSep + "Projects-Interface" + <> PathSep
Tool_XML_Export_Projects
sys_ShellExecute ("open"; vsExportPath; ""; ""; SW_SHOWNORMAL)
```

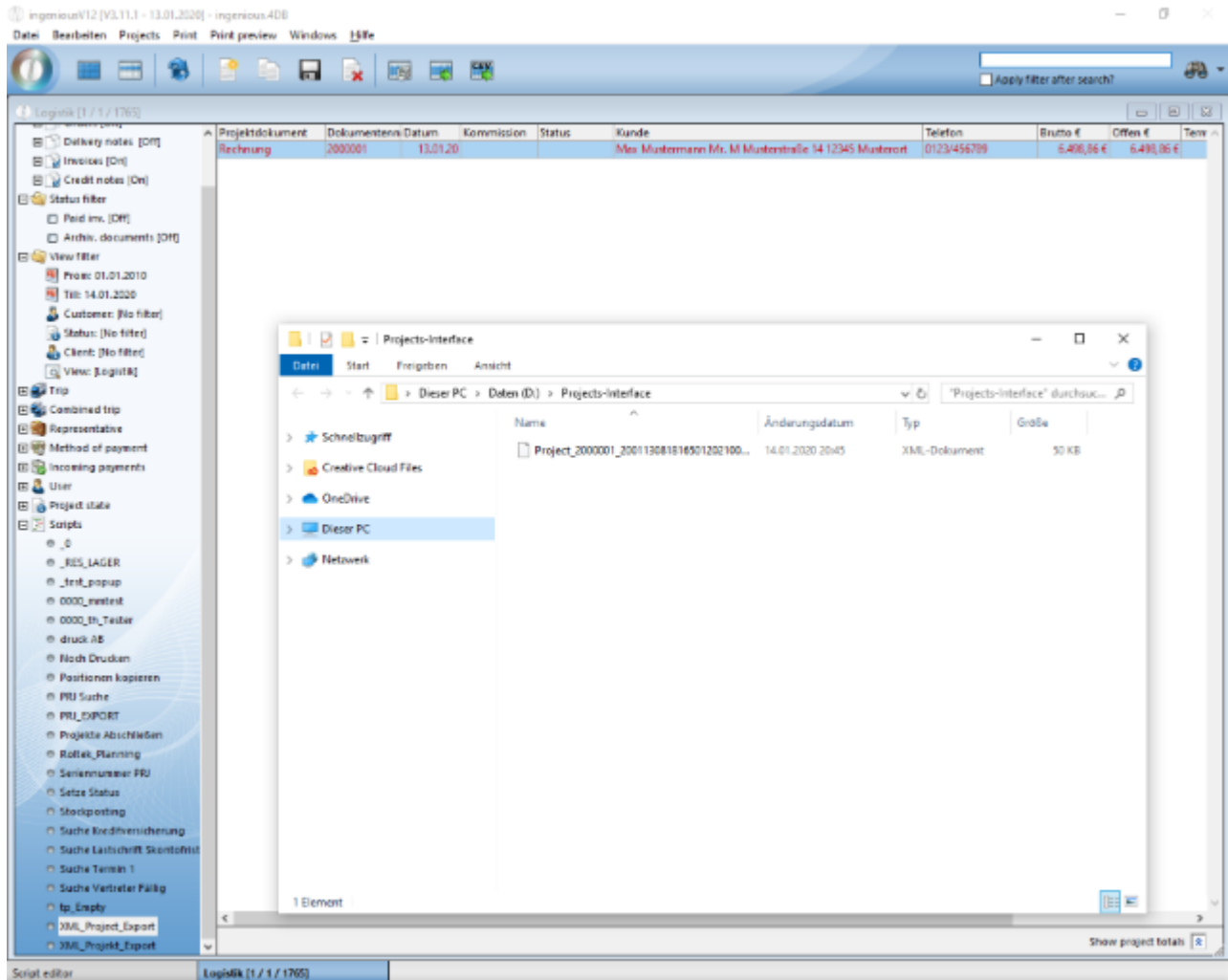
To export the projects from the project list, the script must be created as a stored script and assigned to a project list.



In the project list, all required data records are to be marked for export and the export can be started via the entry "XML_Project_Export" (according to the name under which the script was created).



The export folder is then opened in accordance with the call "sys_ShellExecute (" open "; vsExportPath;" ";" "; SW_SHOWNORMAL)". The exported data records were created.

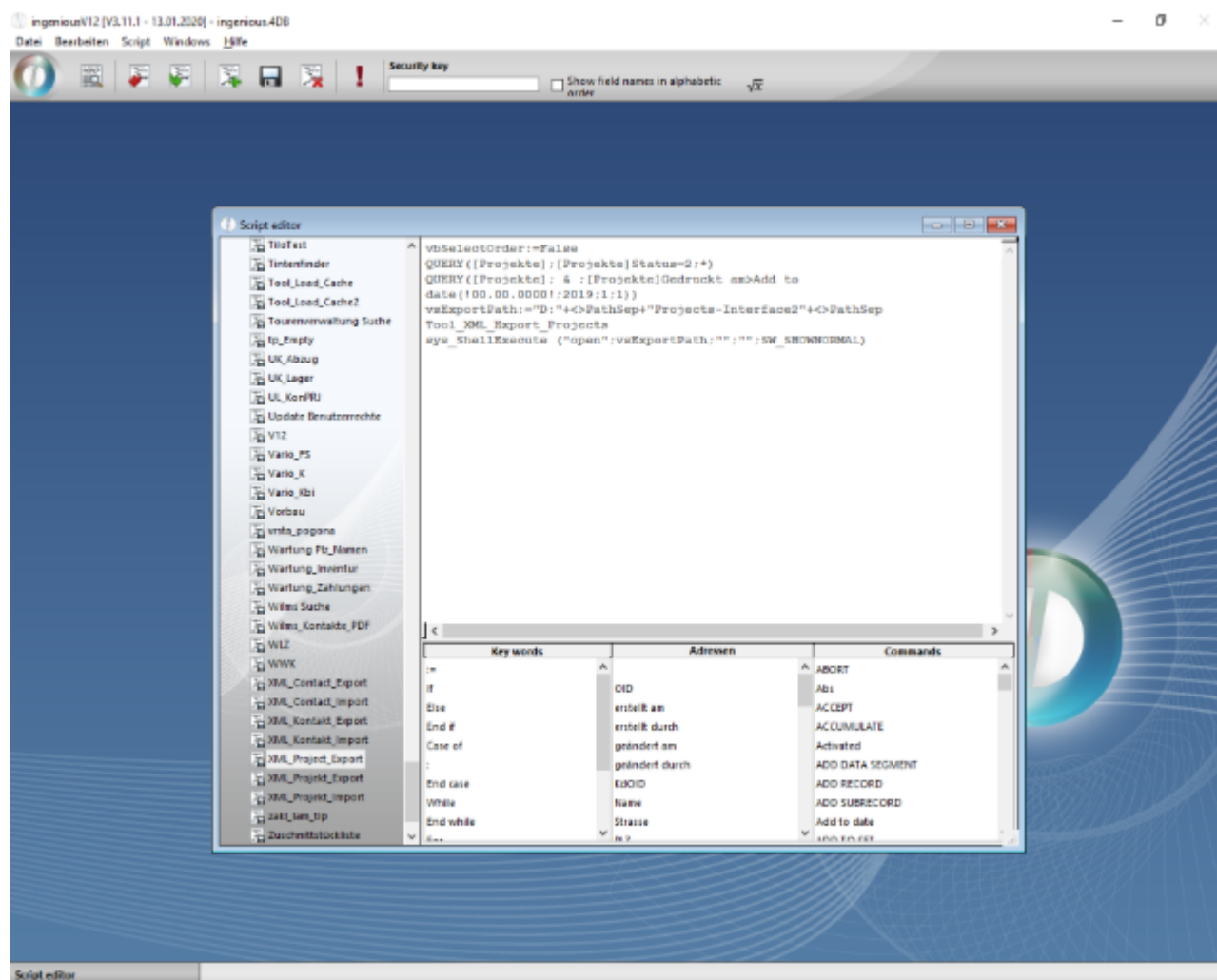


2. Export projects via script search

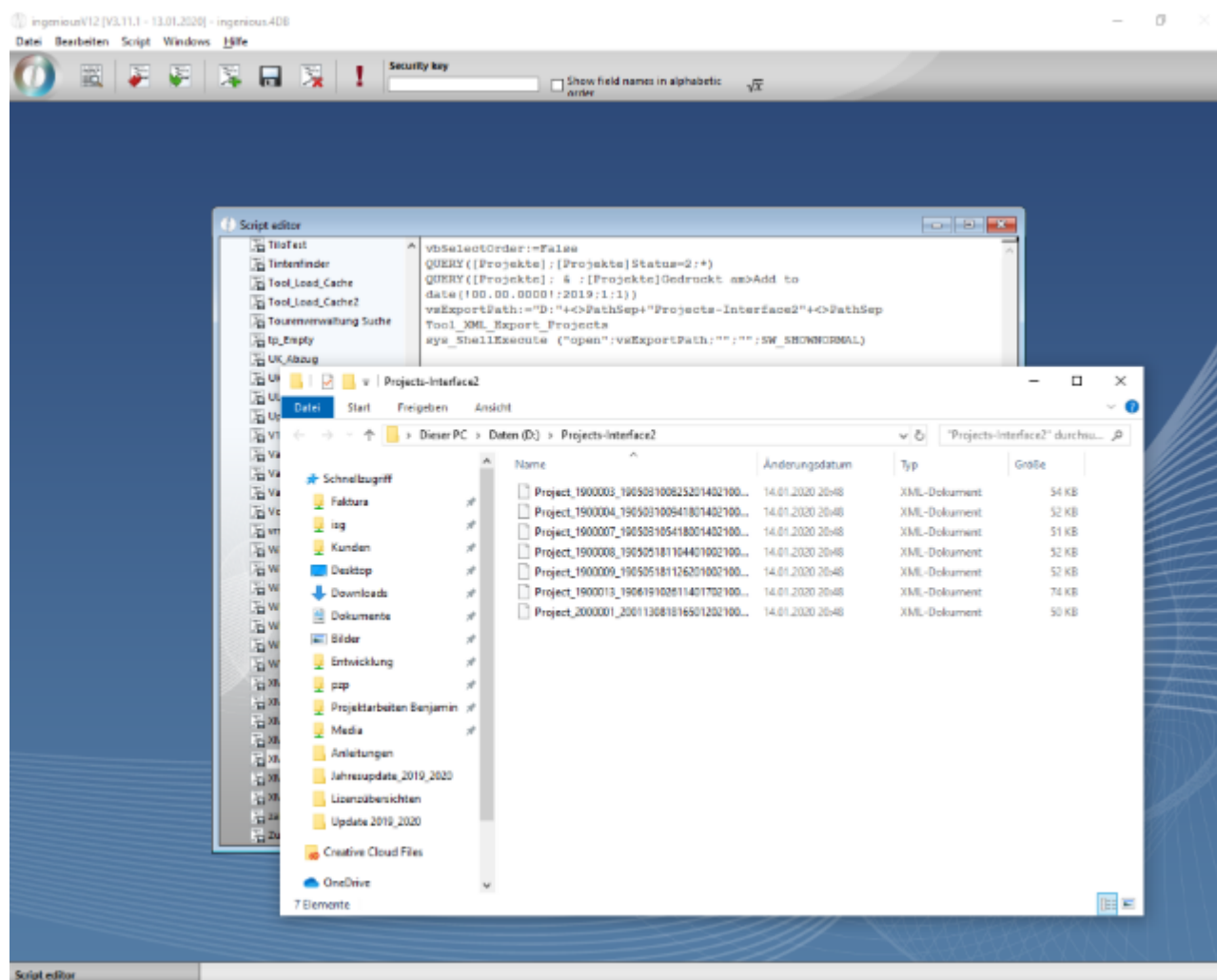
The project XML export can alternatively be started directly in the script module. Here you must explicitly specify which projects are to be exported.

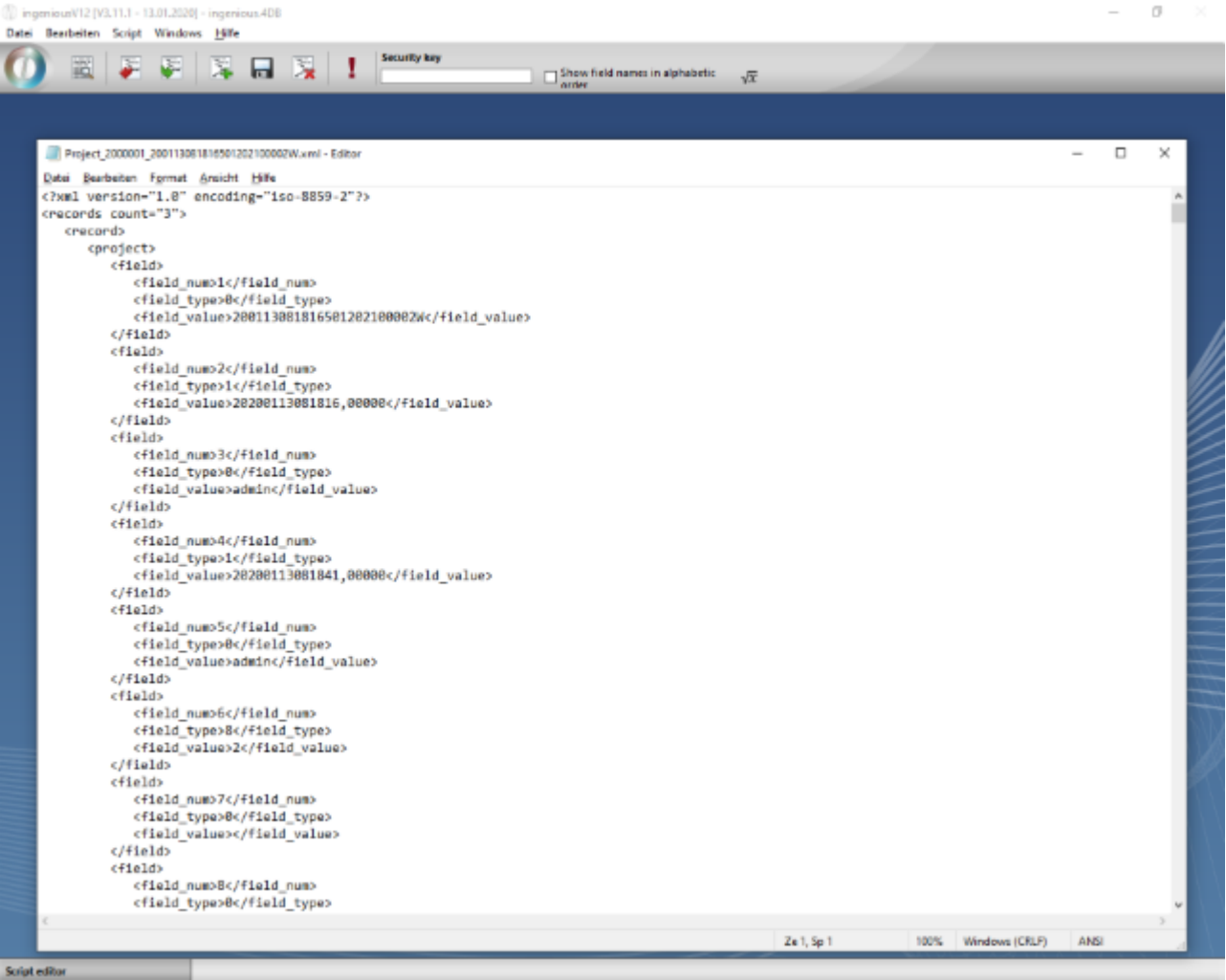
Project export via script search

```
vbSelectOrder:=False
QUERY ([Projekte]; [Projekte]Status=2;*)
QUERY ([Projekte]; & ; [Projekte]Gedruckt am>Add to date(!00.00.0000!;2019;1;1))
vsExportPath:="D:"<>PathSep+"Projects-Interface2"<>PathSep
Tool_XML_Export_Projects
sys_ShellExecute ("open";vsExportPath;"";"";SW_SHOWNORMAL)
```



The exported data records are written to the specified folder.





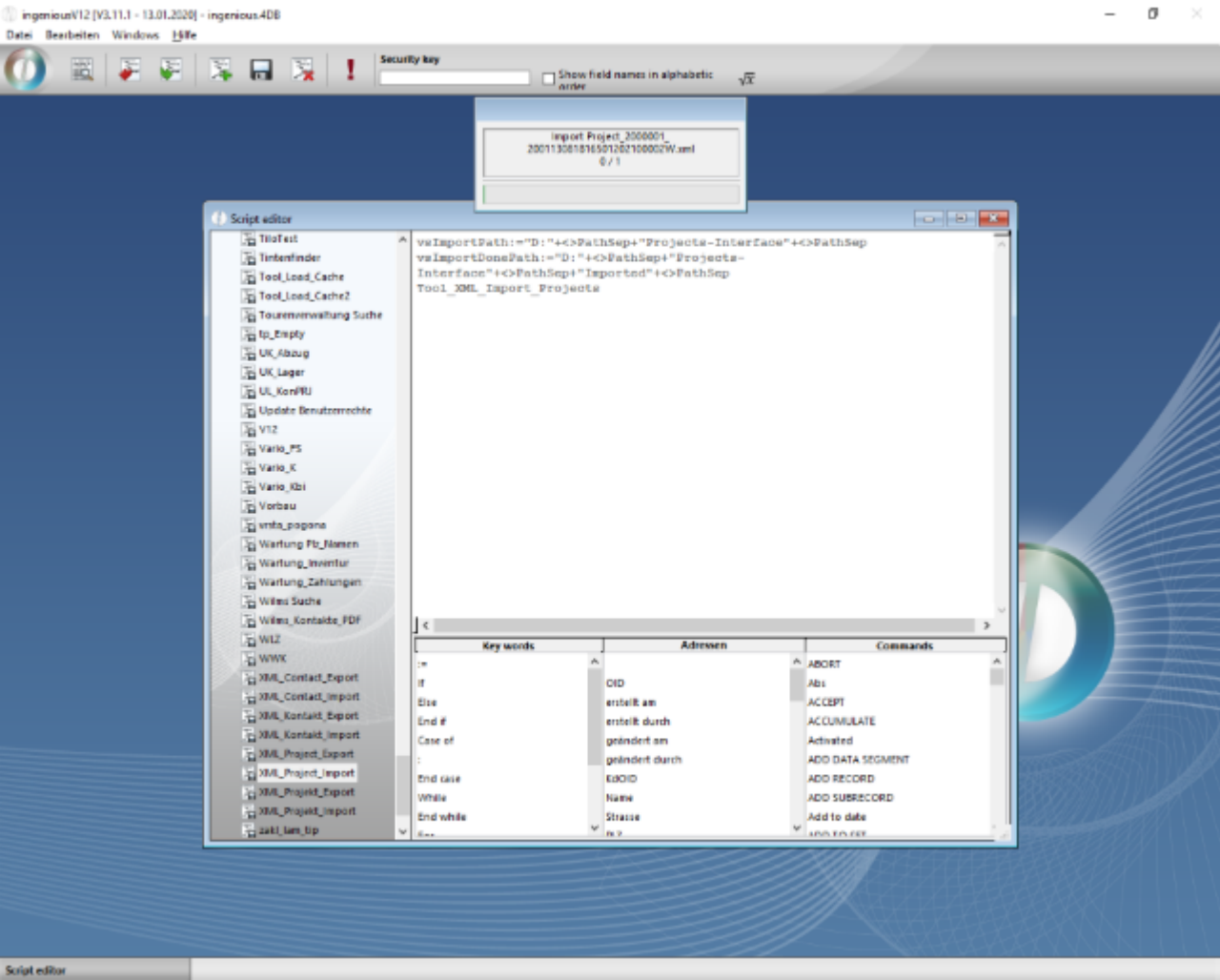
Import

The project data records are imported via the API Tool_XML_Import_Projects. The following optional variables are available:

vsImportPath	:= ""	The user is asked to manually select the import directory during the import.
	# ""	Specification of the source directory in the script
vsImportDonePath	:= ""	Files already imported are not moved.
	# ""	Successfully imported files are moved to the specified directory. This enables more precise monitoring of the import.

Script for importing projects

```
vsImportPath:="D:" + <>PathSep + "Projects-Interface" + <>PathSep
vsImportDonePath:="D:" + <>PathSep + "Projects-Interface" + <>PathSep + "Imported" + <>PathSep
Tool_XML_Import_Projects
```



11.5.1.3 Contacts XML export and import

For the exchange between 2 ingenious.V12 databases, contact data records including linked information such as additional addresses, project-related texts, special prices, documents & appointments, file attachments, user fields and links to contact folders can be exported and imported in XML format.

Export

The API Tool_XML_Export_Contacts can be started with 2 optional variables:

vbSelectOrder	:=True	The selection of the contacts to be exported is determined from the contact list. To do this, the script must be run from a contact list.
	:=False	The selection of the contacts to be exported must be defined in the script.

vsExportPath	:= ""	When exporting, the user is asked to select the export directory manually
	# ""	Specification of the target directory for the export

1. Export of manually selected contacts

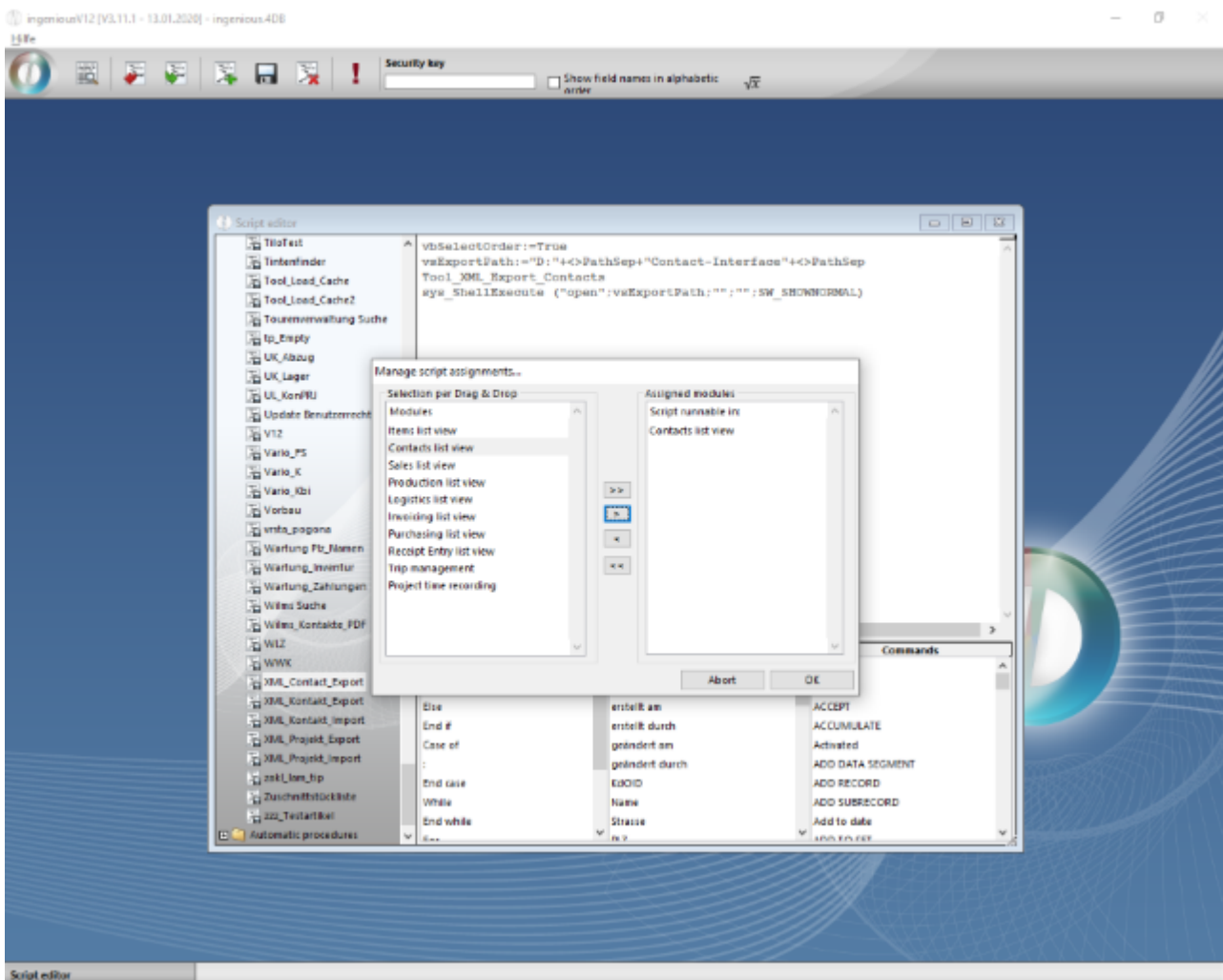
Export of manually selected contacts

```

vbSelectOrder:=True
vsExportPath:="D:" + <>PathSep + "Contact-Interface" + <>PathSep
Tool_XML_Export_Contacts
sys_ShellExecute ("open";vsExportPath;"";"";SW_SHOWNORMAL)

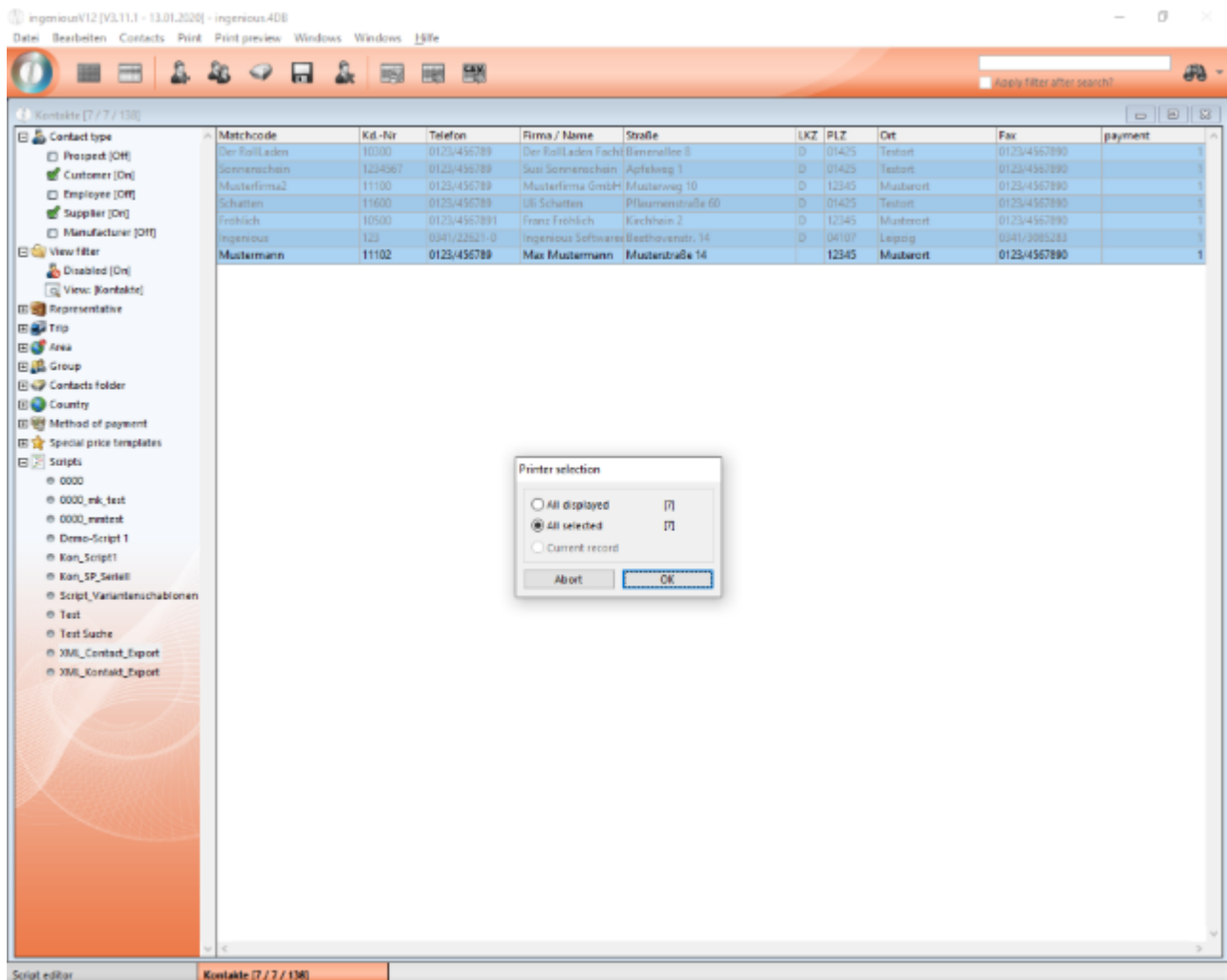
```

To export the contacts from the contact list, the script must be created as a saved script and assigned to the contact list.

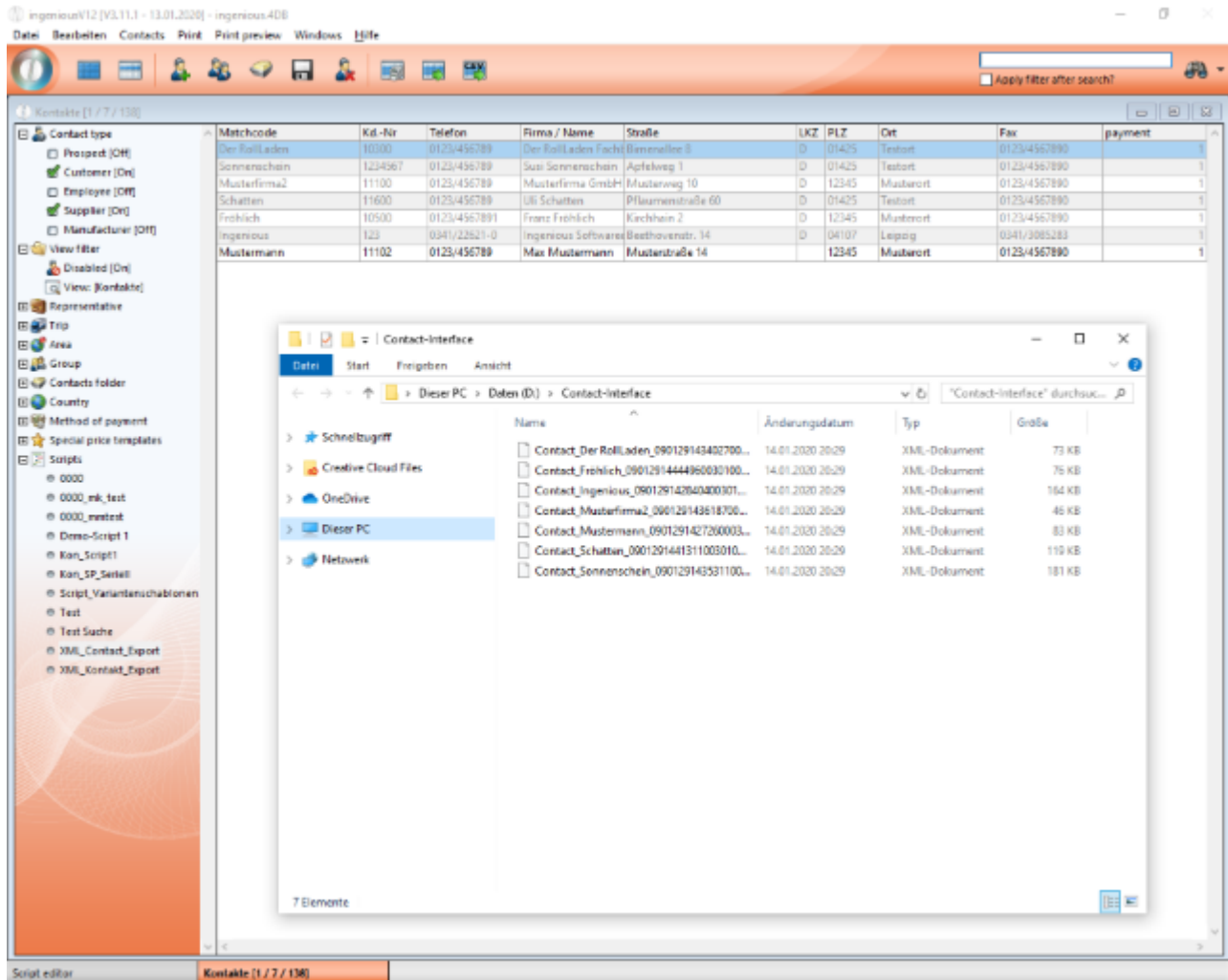


In the contact list all required data records are to be marked for the export and the export can be started via the entry

(according to the name under which the script was created) "XML_Contact_Export".



The export folder is then opened in accordance with the call "sys_ShellExecute (" open "; vsExportPath;" "; SW_SHOWNORMAL)". The exported data records were created.

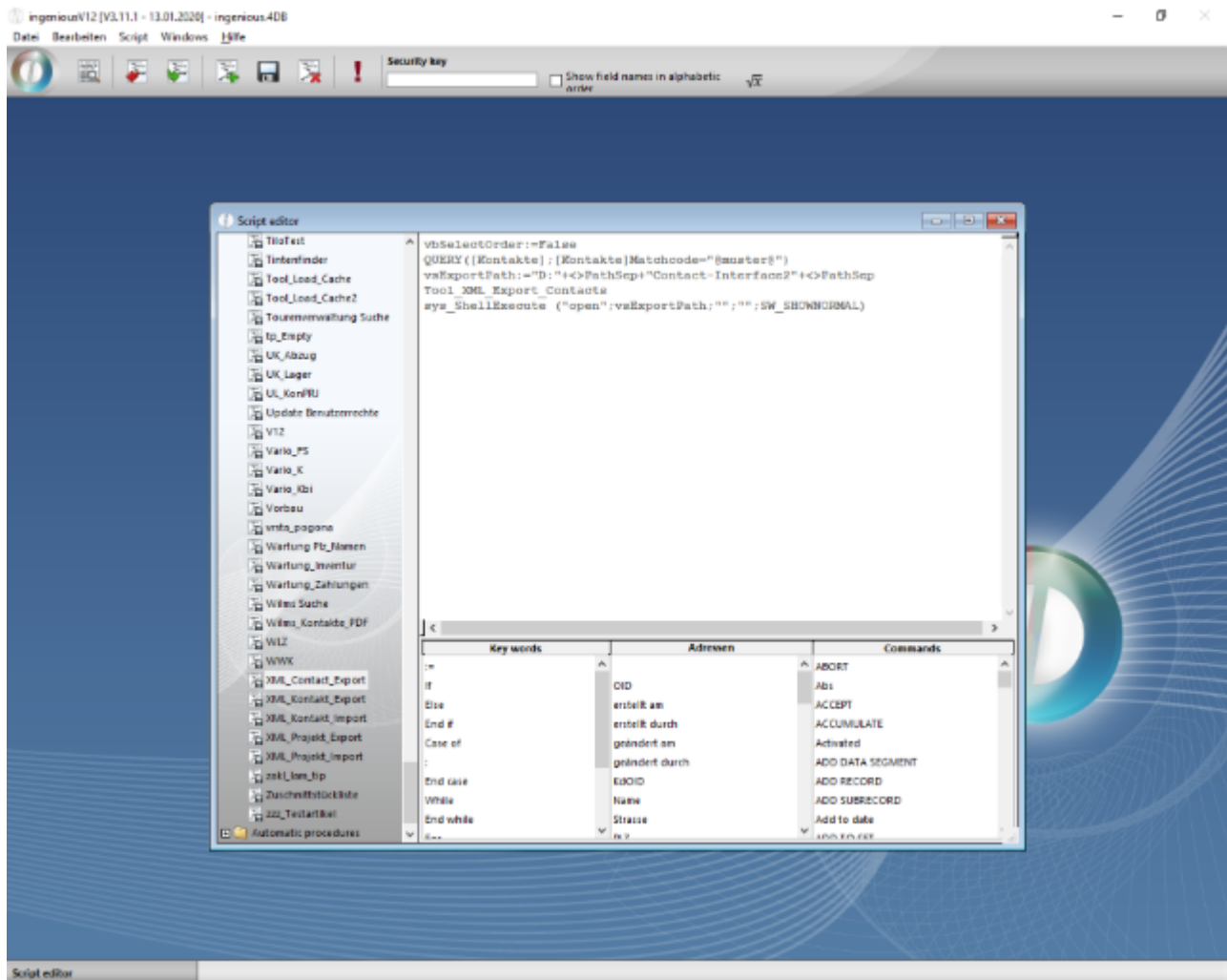


2. Export contacts via script search

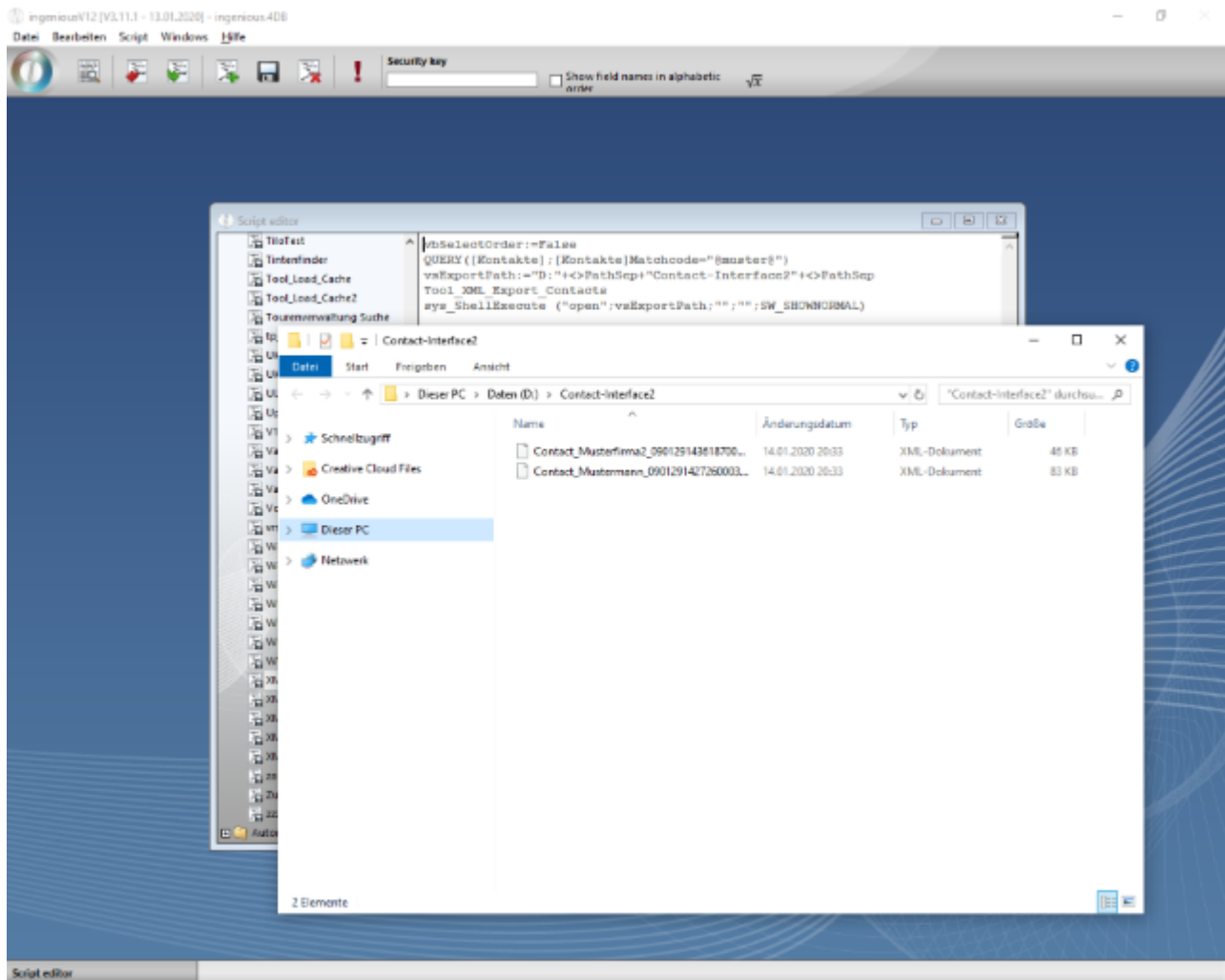
The contacts XML export can alternatively be started directly in the script module. Here you must explicitly specify which contacts are to be exported.

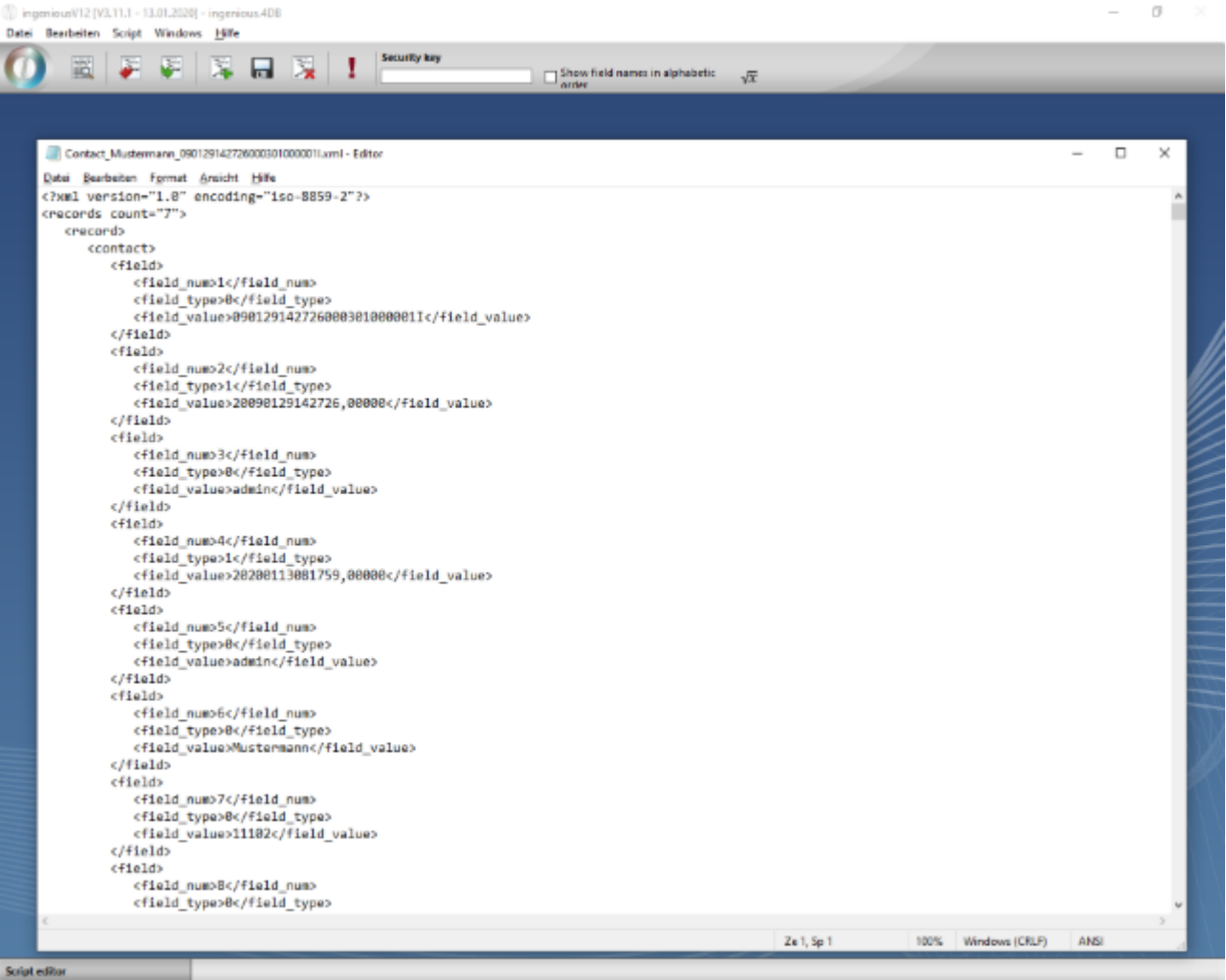
Contact export via script search

```
vbSelectOrder:=False
QUERY ([Kontakte]; [Kontakte]Matchcode="@muster@")
vsExportPath:="D:" + <>PathSep + "Contact-Interface2" + <>PathSep
Tool_XML_Export_Contacts
sys_ShellExecute ("open";vsExportPath;"";"",SW_SHOWNORMAL)
```



The exported data records are written to the specified folder.





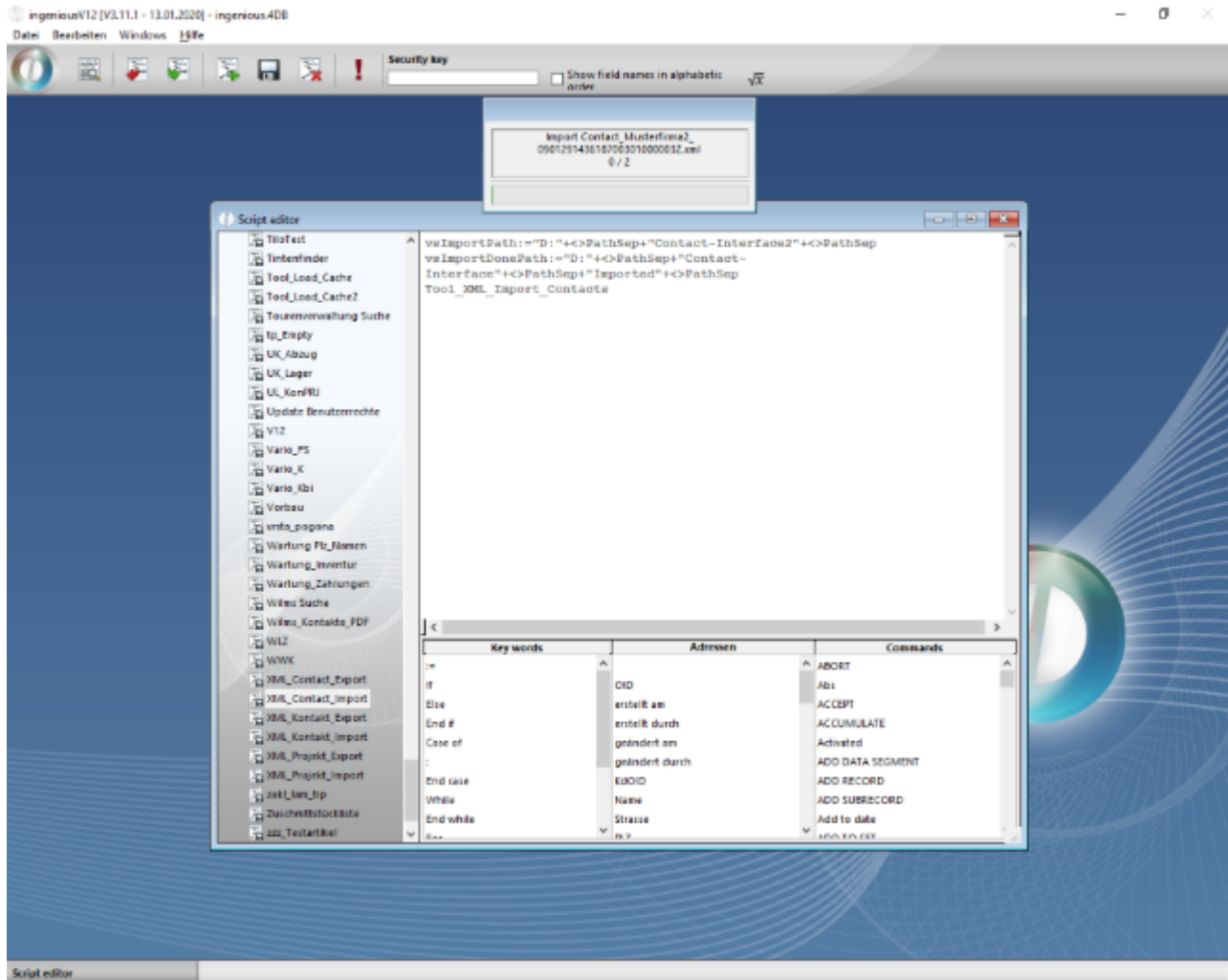
Import

The import of the contact data records is carried out via the API Tool_XML_Import_Contacts. The following optional variables are available:

vsImportPath	:= ""	The user is asked to manually select the import directory during the import.
	# ""	Specification of the source directory in the script
vsImportDonePath	:= ""	Files already imported are not moved.
	# ""	Successfully imported files are moved to the specified directory. This enables more precise monitoring of the import.

Script for importing contacts

```
vsImportPath:="D:" + <>PathSep + "Contact-Interface2" + <>PathSep
vsImportDonePath:="D:" + <>PathSep + "Contact-Interface" + <>PathSep + "Imported" + <>PathSep
Tool_XML_Import_Contacts
```

11.5.2 Enhancements 2019-2020

New Features

Contact, article and project export as freely definable XML via web request	XML export via web request (Section 11.5.1.1)
Transfer of project documents from one ingenious.V12 database to another	Projects XML export and import (Section 11.5.1.2)
Transfer of contacts from one ingenious.V12 database to another	Contacts XML export and import (Section 11.5.1.3)

New user rights

100.160 - Contacts - Modification of additional addresses

New API methods

Tool_Pos_Waste_To_Zero - sets the waste of the selected project positions to 0, issues a warning message if the positions have already been booked or reserved.

Tool_Pos_Waste_To_Zero ("*") - Sets the waste of the selected project positions to 0, without warning messages

Tool_Prj_Recalculate - Recalculates all partlists in selected projects. Inventory bookings are created if necessary, manual changes are overwritten. Parameters, all boolean: 1. including archived projects, 2. including projects with inventory bookings, 3. new generation of all PPS data records, not just those that have not yet been processed

Various minor extensions / adjustments

- Generic XML import: alternative file storage on network directory instead of FTP server
- Script integration in project times list
- Placeholder "Item with extra charge" can process several parts list variables with respective system modules
- Project-related order picking with an additional flag for deactivating rounding up to entire warehouse lengths -
> Suppress rounding up when creating the order
- Release "Exec_Script" for all columns of the service items and for the left column in the checklist
- New keyword on measurement sheets "DrawItemPic" - Loads standard article image as a thumbnail, it is based on max. 120x120 px scaled
- New program setting - stock movements - rounding of the posting quantity (decimal places)
- Inventory document -> Standard PP can be overwritten
- Item detail, images -> Button to open the network directory in which the item images are stored as a file
- Project-wide order picking - button for resetting items already ordered
- Extension of the program settings by 2 functions with which incorrect, old reservations, whose linked positions have been deleted in the meantime, can be removed from the database
- Order assistant - order picking -> document reference of the linked sales document added in notes
- Order assistant - supplier search
- Take over payments when converting the prjct -> adjustable in program settings
- Changed: "Change measurement attributes" for several positions: Set statements based on the variables of the first position are ignored. They are carried out individually for each item after the changes have been registered.
- BOM logic added: '= _help_url' for references to general references and '= help_url {variable}' for auxiliary references for individual variables
- Optimizations input mask multi-position input:
 - Skip locked cells - also backwards overwritten with Shift-TabHandling arrow up + arrow down (checks 20 rows in the specified direction to see whether a cell can be entered, otherwise the next cell in the current row)
 - Shift + Pos1 jumps to the first cell in the current row, Shift + End to the last cell that can be entered in the current row
- Articles, XML export and import are supplemented by an additional option for transferring stock balance and inventory bookings. ATTENTION: When transferring inventory bookings, links to project documents / orders may be missing!

11.5.3 Bugfixes 2019-2020

The following bugs in the program code have been fixed:

- Loading, repairing web session arrays
- Version control - After a rollback to an older version, an error message is displayed with each login until either a newer version is imported or the correctness is confirmed with the login "admin"
- Bugfix release "Exec_Script" for left column in checklist set condition
- Bugfix project detail: If old projects contain substitute assignments that no longer exist, they were offered when new projects were opened later
- Input mask for multi-position input: speed optimization
- Corrections Tool_Prj_Recalculate (child items without a suitable BOM item, inventory bookings without item reference, update of new PPS data records)
- Bugfix article XML export
- Bugfix: Client crash when clicking a button (open configurator or show price details) after changing a cell content on the same line WITHOUT previously leaving the cell in the position list (projects, purchasing)
- Bugfix "Workflow - Print project documents" of additional documents (eg collective invoice) after database optimization

12 Company details

12.1 Imprint

Imprint

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