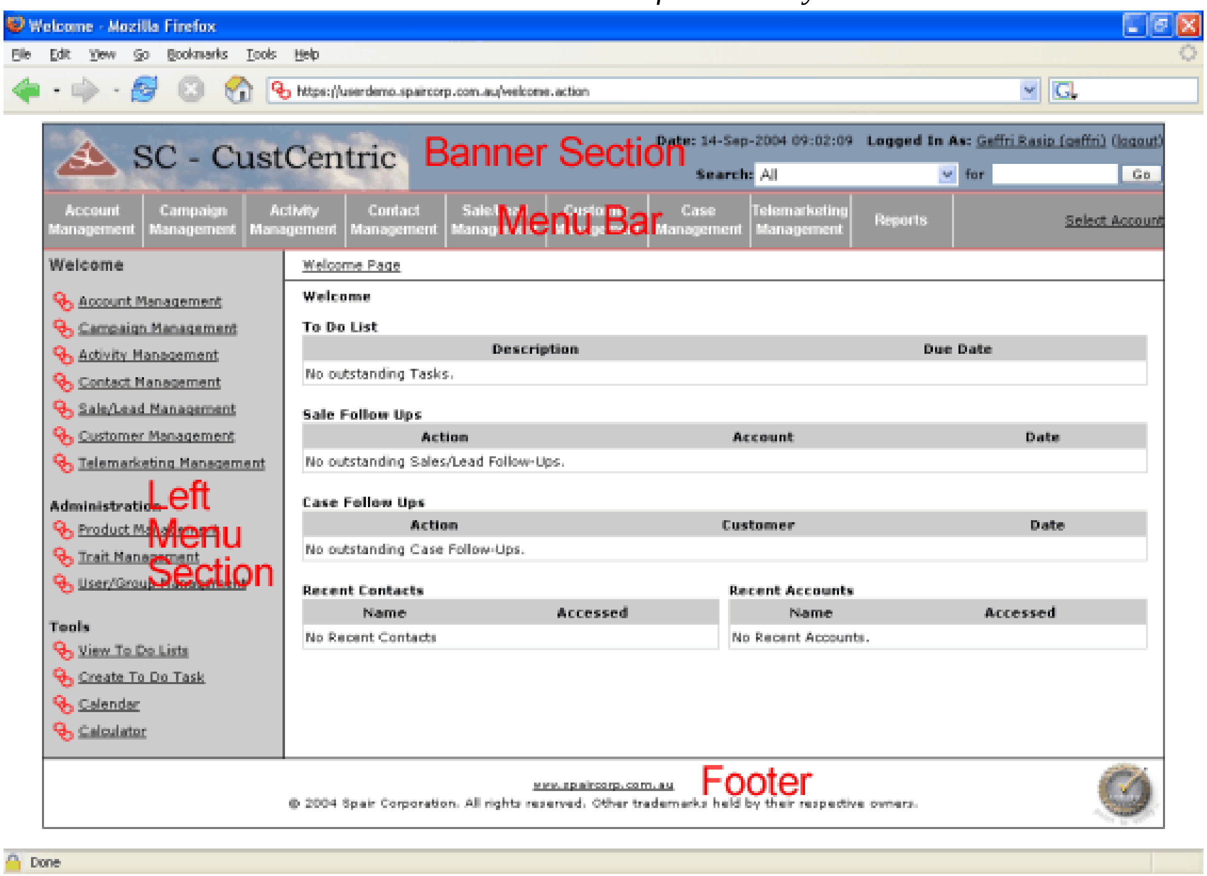
Introduction

All screens share a common format and some common functions.
The diagram below describes the Welcome screen together with an explanation of the common sections and functionality.



Welcome Screen

1. Process Flows

Before we explain the features of the system it may be worth looking at these process flow diagrams.

2. Screens and Functions

2.1. Banner Section

The section displays the Company logo and graphic. The area to the right displays

- Today's date
- Current time for the time-zone of the logged in User
- Name of the logged in User and the Login ID
- Global Search input box

2.2. Global Search

This function is always available from the Banner Section of the screen. It allows the User to search for an Account, Contact, Sale/Lead or Product by entering a string and clicking Go.

The User can choose to search from a list containing the entities Account, Campaign, Contact, Sale/Lead, Product ,or may choose to select All. If All is selected, results will be displayed in multiple tables - one for each entity type.

The fields searched differ for each entity type.

The searched fields for Account are:

- Account number
- Account name
- City/Suburb
- Phone number
- Owner
- Status
- External. reference
- Industry

The searched fields for Contact are:

- Title
- First name
- Last name
- Job title
- Work phone number
- Mobile phone number

The searched fields for Sale/Lead are:

- Sale/Lead ID
- Sale status
- Created by (who created the Sale/Lead)
- Owner (who owns the Sale/Lead)

The searched fields for Product are:

- Product name
- Product code
- Product description
- Product type

2.3. Menu Bar

The Menu Bar contains the buttons to take the User to the main functions. If a menu button or item is not displayed it is likely the User does not have access to this functionality.

If access is needed for a function/operation that is not listed, contact the application Administrator to change the Users privileges.

Also displayed on the Menu Bar is the current Account (Account the User has chosen to work with), and the link for the Select/Change Account function, that allows the User to Select or Change the current Account.

2.4. Main menu buttons

The Main Menu buttons serve as a quick way to navigate through the main functionality of the application. These buttons are always available and visible from all screens.

2.5. Change Account

Also present on the menu Bar is the Select/Change Account function. Almost all operations need to be linked to an Account, therefore an Account must be selected before the User can perform most functions.

When an Account has been selected, the Account name is displayed in the Menu Bar. This Account is considered *current*

To select another Account to work with, the User can select either the Account Management button and make a selection from the table presented, or by clicking the Change Account link.

2.6. Left Menu Section

The section allows the User to navigate and access the functions/operations that are available for the Main Menu action selected.

The functions/operations listed will change depending on the Main Menu action selected and the level of permissions the User has.

For example, the operations available for Account Management are different to those for Contact Management.

If access is needed for a function/operation that is not listed, contact the application Administrator to change the Users privileges.

2.7. Tools

This list never changes regardless of what screen the User is viewing. For further details/explanation on the functions, go to Tools section of this document.

2.8. Recent pages

This lists the last 10 screens/operations that the User has performed. Aside from acting like an audit trail, it provides a means of using the links as a shortcut to particular functionality or screens.

2.9. Footer

This section contains links to Help (this document), Spair Corporation corporate website, a link to contact Support, and the TrustLogo.

2.10. TrustLogo

This indicates the website has been verified by a third-party and belongs to Spair Corporation. More details are available by clicking this icon.

3. Logging In

3.1. Welcome Page

This is the first screen that is presented after logging in. It is a quick way for a User to check all their outstanding tasks - To Do Lists and Follow Ups, as well as reviewing their most recently accessed Accounts and Contacts.

3.2. To Do list

This table lists all Open (Outstanding) tasks that have been assigned to the User. These could include tasks created by other users and assigned to the User, or created by the User as a reminder.

3.3. Follow Ups

Follow Ups are similar to To Do tasks but may be associated with a Sale (Sales Force Automation module) or a Case (Call Centre module).

3.4. Recent Contacts

This is a list of the last 5 Contacts that the User created, updated or viewed. Note: deleted Contacts will not appear in this list.

3.5. Recent Accounts

This is a list of the last 5 Accounts that the User created, updated or viewed. Note: deleted Accounts will not appear in this list.

4. Tools

This section provides the User quick access to the more common and useful utilities.

4.1. View To Do lists

This function presents a screen with all To Dos and Follow Ups related to the User.

The entries are listed in the following tables:

- My Tasks, listing tasks assigned to the User, whether created by themselves or assigned by others
- Tasks Assigned to Others, lists tasks that the User created and assigned to other parties. This allows the User to monitor those tasks
- Sales Follow Ups, listing Follow Ups assigned to the User, whether created by themselves or assigned by others

4.2. Create To Do task

This allows a User to create a reminder task or a To Do. This To Do can also be assigned to another User to be actioned.

4.3. Edit/Update a To Do

To Do details can be edited or updated by selecting it from the To Do list in the View To Do lists screen.

4.4. Re-assigning a To Do

A To Do can be re-assigned to another User by selecting it from the To Do list in the View To Do lists screen and updating the Assignee item.

4.5. Close a To Do

A To Do can be Closed by selecting it from the To Do list in the View To Do lists screen and updating the Status indicator.

4.6. Calendar

A calendar presented in monthly views.

4.7. Calculator

A standard mathematical calculator.

5. Contact Us

5.1. Support

Support is available to assist with queries on how to use the application or if a User experiences errors or a breakdown of service.

In the instance of application queries, Spair Corporation suggests referring to the Online Help documentation (this document). For error messages, first refer to the Error Messages section.

Support can be contacted by selecting the Support link in the Footer section. This will initiate an email that will be sent to Spair Corporation support teams. Include as much detail as relevant. Most support requests are replied within the same day.

5.2. Error messages

This application and system has been rigorously tested under a variety of conditions.

While most error messages will relate directly to the data being input (for example, incorrect date format, or missing fields), due to the nature of the Internet and Internet Browsers, on occasion a User may experience 'strange' or 'unclear' error messages.

In the majority of cases, the problem is with the Browser (Internet Explorer or Netscape), and will reset itself once the browser is closed and re-opened.

In persistent cases, please contact Support (see Support section).