Hansa Financials
HansaWorld

Integrated Accounting, CRM and ERP System for Macintosh, Windows, Linux, PocketPC 2002 and AIX

Volume 6: Personal Registers

CRM, Activities, Task Manager, Calendar and Mail

Preface

The Hansa Financials and HansaWorld ranges contain a number of powerful accounting, CRM and ERP systems for the Windows, Macintosh, Linux, PocketPC 2002 and AIX environments.

Hansa Financials and HansaWorld are practically identical, and they are designed to make administration and accounting as easy and fast as possible. The main differences between the two programs are discussed in the appropriate sections of these manuals.

The programs are similar in operation regardless of platform. In the specific areas where there are significant differences, these are described and illustrated in full. In all other cases illustrations are taken from the Windows version.

This manual covers Hansa's Mail, Activities, Task Manager and Calendar features. Prior to reading it, you should already be familiar with Hansa's Work Area (its modules, registers, windows, menus and buttons) and the Customer and Item registers. These are covered in Volume 1 of these manuals.

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

How these manuals are organised

Volume 1: Introduction

Introduction	Installing Hansa, the basic ideas
Work Area	Basic elements of Hansa: modules, registers, windows, menus, functions, buttons
Accounting Principles	
	About Hansa's place in your business, integration between ledgers, objects
Starting Work	Entering opening balances
Customers	Customers, customer categories and reports
Items	Products and services, pricing
System Module	Settings and parameters. System-wide usage

Volume 2: Accounting Package

Volume 2a	**Sales Ledger**	Invoices, receipts, debtors
	Purchase Ledger	Purchase invoices, payments, creditors
Volume 2b	**Nominal Ledger**	The basic accounting module. Transactions and budgets
	Currency	Multi-currency in all modules

Volume 3: Logistics Package

Sales Orders	Orders and deliveries. Invoices from orders
Purchase Orders	Purchase orders, goods receipts and purchase pricing
Stock	Deliveries, goods receipts and stock movements

Volume 4: General Modules

Assets	Asset accounting, depreciation, revaluation
Cash Book	Inward and outward cash transactions, receipts and payments
Consolidation	Multi-company reporting, subsidiaries and daughter companies
Expenses	Payments to and from employees
Quotations	Sending quotations, call backs, reports

Volume 5: Specialised Modules

Contracts	Periodic invoicing, contract renewals, contracts from invoices
Job Costing	Project management, time recording, budgets and quotations
Production	Multi-level assemblies from components
Service Orders	Management of service stock, invoicing of repairs, warranties

Volume 6: Personal Registers

CRM	Contact and time management. Activities, the task manager and the calendar: registering and reviewing appointments in daily or monthly diary or calendar format. Contact Persons. Customer letters and mailshots. Target time.
Mail	Internal mail, external mail (email), conferences, chat.

Contents

Hansa Financials HansaWorld

CRM (including Activities, Task Manager and Calendar)

Chapter 1: The Customer Relationship Manager

The CRM module (Customer Relationship Manager) is a simple and efficient tool for keeping track of contacts with Customers, organising mailshots and for planning activities of all kinds. The module can be used to record the different tasks and events in the business day, such as customer contacts for sales, service support, consultancy appointments etc. In Hansa, each task and event is saved as a separate record in the Activity register. Activities can be viewed, reviewed, changed and added to using the Calendar and the Task Manager. They can be used as a planning and monitoring tool for a sales force, or as a tool to log telephone calls to a customer service centre, and in many other ways. As with all Hansa modules, there is a great deal of flexibility, and different users will adapt it to their own requirements.

This chapter begins with an example and continues with a description of the Activity register, the heart of Hansa's time and contact management systems. To keep your Activities separate from those of other users, the Activity register cannot be accessed directly except from the System module. Instead, it is accessed through the Calendar, the Personal Calendar report and the Task Manager. These are described later in the chapter. The Customer Letter and Target Time registers are then described, and the chapter ends with descriptions of the various documents and reports in the CRM module.

Examples

Contact Management

To explain the CRM module we have prepared a small example. The business is an export business with a number of sales persons who communicate with domestic and foreign firms via phone, fax and e-mail. We shall follow one of the sales persons through a day's work with the CRM module.

In the morning, Françoise French will open the Task Manager (i.e. her 'To Do' list). To do this, she will click the [Tasks] button in the Master Control panel—

The Task Manager lists Activities whose Task Type is To Do. In practice, it is a list of the Activities that Françoise is to carry out by the end of the day (including Activities from previous days that have not been completed). Activities that have been marked as Done are not shown. The Activities are sorted by Start Date and Time, but Françoise can change this by clicking on one of the column headings.

If the list was a long one, Francoise could reduce it to show Activities of a particular Type, Customer and/or Priority using the fields above the list.

When Françoise carries out one of these planned Activities, she will double-click the Text in the appropriate row to open the corresponding record in the Activity register. She can then remind herself of the details of the Activity before carrying it out. She does this now for the last Activity in the list.

When she has complete the task, she can record the Result in the field at the bottom of the window and mark the Activity as Done by marking the check box in the top right-hand corner—

For example, in the case of her scheduled telephone call to Li Wuan Sok of the New World Import/Export Co, the call was made successfully and interest was expressed in the products she was selling. This interest is recorded in the Activity record. If necessary, more details can be entered to the grid on the 'Text' card—

	Code	Text
1	BR	Seems very interested: send him a brochure
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		

On saving and closing the Activity, the Task Manager is updated automatically. The last Activity is removed, since Activities that have been marked as Done are not usually listed—

Sometimes, it will not be necessary to open an Activity in order to complete it. The Task Manager itself displays sufficient information to carry out the work, including any comments previously entered on the 'Text' card. These notes can be seen by clicking the arrow icon to the left of the Activity Text. Françoise does this for the first Activity in the list—

When she has completed the task, if there is no need to enter a Result, enter more notes or create a new follow-on Activity by duplication, Françoise can mark the Done box in the Task Manager list by clicking—

This marking of the Done box is not fed through to the corresponding Activity immediately. Françoise must save the Task Manager (by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done and to remove it from the Task Manager list. Of course, she could mark several rows as Done before saving.

On reviewing her Task Manager, Françoise decides to call Joseph Conrad at the Against All Odds Trading Co. She double-clicks in the Text column to open the Activity to remind herself of the details.

The Text field shows her that she is to make the call to follow up a Quotation that has already been sent, to try to convert it into an Order. In fact, the Activity was created when the Quotation was sent out, using the 'Create Activity' function on the Operations menu of the Quotation screen. This function automatically attaches the Quotation to the Activity. The [Attachments] button (with the paper clip icon) reminds Françoise that the Activity has an Attachment—

When viewing the Activity, Françoise can easily remind herself of the details of the Quotation by clicking this button to open a list of Attachments—

Archive: Activity: 50

| Operations | Close |

🔲 Quotation: 7002

One Object
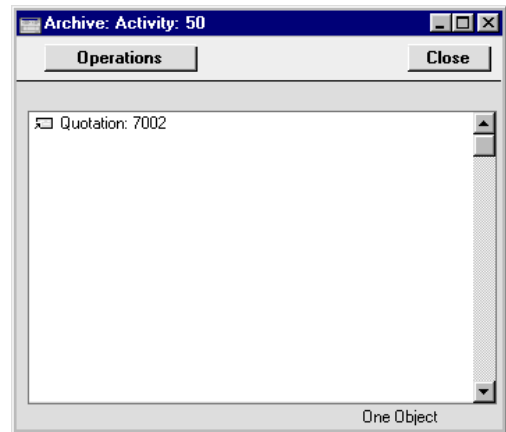
Then she double-clicks the Quotation in the list. The Quotation is opened—

Quotation: Inspect

◀ ▶ | Operations | | New | Duplicate | Cancel | Save

No. 7002   Name Against All Odds Trading Co   📎
Customer 001   Project   ☐ Closed

| Date | Items | Currency | Del | Inv. Address | Del. Address | Job Costing |

Date 17/9/2002   Valid Until   Status
Pay. Terms 30   Make Contact 24/9/2002   ⦿ Open
Our Ref. 42   Decision Date   ○ Accepted
Attn. Joseph Conrad   Probability   ○ Rejected
Salesman JNW   Quotation Class

	Item	Qty	Description	Unit Price	%	Sum	
1	10106	1	CD player	71.00		71.00	A
2	10105	1	Cassette deck	56.00		56.00	B
3	10110	1	Amplifier	90.00		90.00	C
4	10104	1	Loudspeakers	15.00		15.00	D
5							E
6							F
7							
8							
9							
10							
11							

Total GP 150.00   VAT 40.60   Sub-Total 232.00
Currency NLG   GP % 64.7   Base 272.60   TOTAL 272.60

Françoise is able to convert the Quotation into an Order. She selects 'Order' from the Operations menu, and an Order is created and opened—

From the Task Manager, therefore, Françoise has been able to move into the Quotation and Sales Order modules, quickly and easily find the Quotation she wanted, and generate an Order, all in single steps. She could now print an Order Authorisation, close the Order and Quotation screens, mark the Activity as Done and finally return to the Task Manager.

At other times during the day, Françoise will be contacted by several of her Customers. By entering an Activity for each contact or event, she will quickly build up a contact history for each Customer. This means that if, for example, Mr. Wang from Hong Kong sends a fax complaining about a missing delivery of goods, she will easily be able to call up a list of recent Activities relating to Mr Wang's company. This list would include both her own contacts with the company and those of other members of staff.

One way Françoise can do this is to use the 'Filter' card of the Task Manager. She can remove her initials from the Person field, enter "002" as the Customer (using 'Paste Special' to select the correct one if necessary) and choose to view Done Activities using the fourth column of options. She will then see a complete contact history for Customer 002, and will be able to double-click the Text of any Activity to see more details if necessary—

An alternative method with the advantage of displaying Activity Dates would be to produce an 'Activities, Customers' report for Customer 002—

The detailed variant of the report is illustrated.

In both cases, Françoise can see at a glance the comments recorded on the 'Text' card of each Activity. Both show the Activities carried out and entered by different persons over the time period, and are excellent tools to be used to sort out any queries or mistakes in relation to a series of events, providing, of course, that each member of staff has conscientiously entered a record of each task they have carried out.

As with all Hansa reports, the 'Activities, Customers' report contains a Search facility that can be used to look for occurrences of a particular word or words in the report. The production of this report can of course be followed by other reports, after searching related information. Several reports can be kept on the screen at the same time, which adds a tremendous flexibility and power to the system. Françoise can also click on an Activity Number in the left hand column to open an Activity record.

Time Management

Françoise is also engaged in time management and analysis. She is in charge of a department in which there are two other sales people working. In planning the work for the coming month, she decides to book a particular afternoon to be spent on the telephones following up leads and making cold calls. She enters an Activity in the names of all three department members booking their time—

Françoise enters the initials of the three members of the department in the Persons field, separated by commas. She sets the Task Type to Calendar, signifying that the Activity is to appear in the Calendar rather than in the Task Manager. This Task Type also means that the Activity will be included in the Employee Time Statistics report, used for time analysis. Of the Calendar options, Profile is chosen to indicate that this planned time.

When the Activity is saved, it will appear in the Calendar for each of the three members of personnel. When they open their Calendars by clicking the [Calendar] button in the Master Control panel, they will become aware that their time that afternoon has been booked—
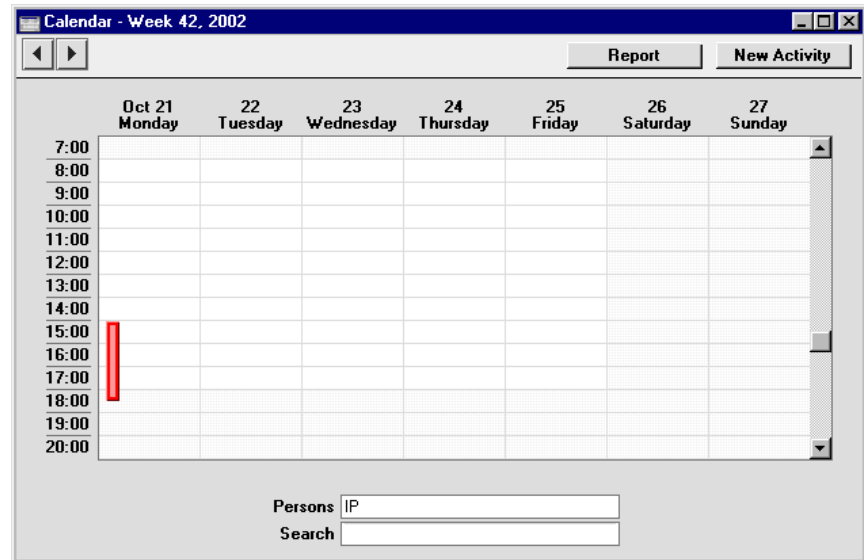
The Activity appears in their Calendar as a hollow coloured bar, because Françoise selected the Profile option. This bar signifies to the other two members of the department that their time has been booked. If either of them clicks the bar once, the Text of the Activity appears in the Search field at the bottom of the screen. They can also double-click this bar to open the Activity record if they want to see more details about what they will be doing.

Everyone else in the company can also view the Calendars of these three members of staff and see that their time has been booked.

During the afternoon in question, various methods are available to Françoise by which she can record the work actually carried out. She decides to ensure that separate Activities are entered for each telephone call. These will record the details of each call (keeping the contact history for each Customer up to date) and allow the creation of follow-up Activities should these be required.

One such Activity recorded by Françoise's colleague Neil Brooker is shown below—

The Calendar is not really suitable for the displaying of many small Activities representing individual telephone calls, so the Task Type is set to To Do. These Activities are not entered for time management purposes but to contribute to the contact histories of the Customers affected. Selecting To Do means the Activity will not appear in the Calendar or in the Employee Time Statistics report.

Details of each telephone call are recorded in the grid on the 'Text' card of each Activity—

In this example, the call ended with a request to send some information to the Customer. After saving the Activity and while it is still on screen, Neil can click the [New] or [Duplicate] button to create a new Activity containing the instruction to send out the information. This can be in his own name, to remind himself to do this job later, or it can be in the name of the Person that usually sends out information. In the latter case, this Person will become aware that a job needs to be done when the Activity appears in their Task Manager or Calendar (depending on whether Neil sets the Task Type to To Do or Calendar respectively).

The creation of the follow-up Activity can be automatic. This is controlled using the Activity Consequences setting in the CRM module. Separate records can be entered to this setting for each Activity Type/Result combination, specifying the Person, Activity Type and Text to be used in the follow-up Activity. Whenever an Activity with a particular Activity Type/Result combination is marked as Done and saved, a new Activity will be created with these details taken from the appropriate record in the setting.

At the end of the day, Françoise enters new Activities for each member of staff, representing the afternoon's work. These Activities are solely for time management purposes. Neil Brooker had to leave early to go to the dentist, so Françoise enters this Activity recording the work that he was able to do—

Since this Activity is to serve a time management purpose only, she sets the Task Type to Calendar. From the Calendar options she selects Time, because the Activity represents the actual time spent making the calls. As a result, the Activity will appear in Neil's Calendar as a solid coloured bar to the right of the hollow bar entered earlier to book his time. It was for this purpose of comparison that Françoise created a new Activity instead of changing the earlier Activity from Profile to Time—
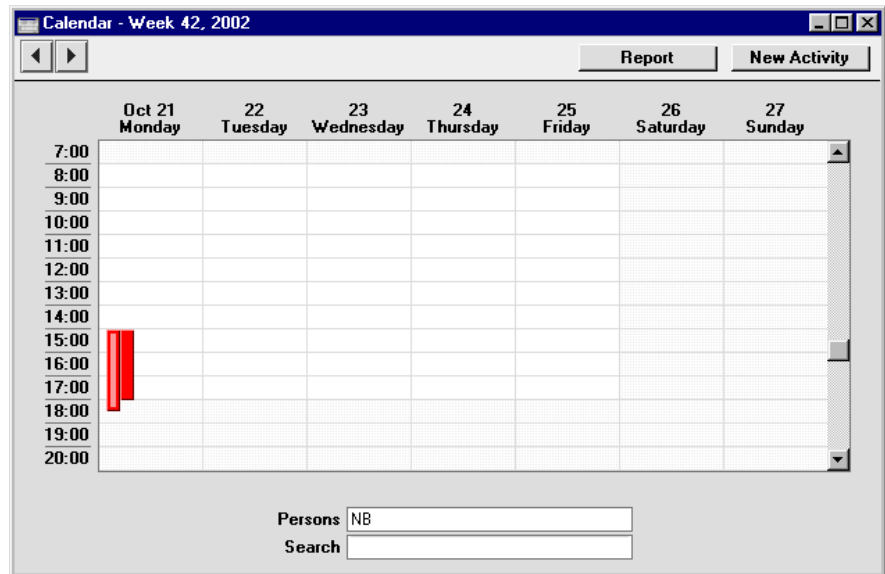
Neil's early departure is represented by his Time bar (solid colour, to the right) being shorter than his Profile bar (hollow).

The time spent by all three employees can be shown in the Calendar by entering the three sets of initials in the Persons field, separated by commas—
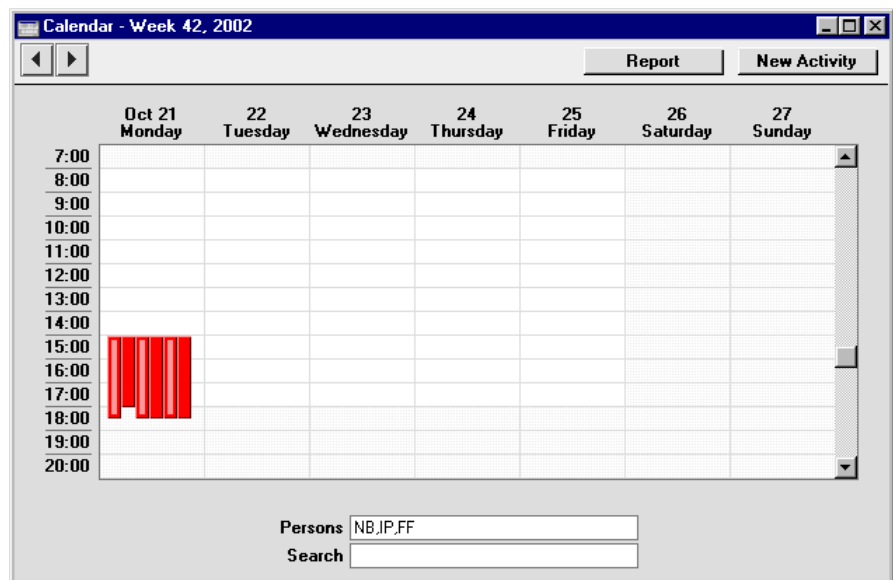
The position of the coloured bars corresponds to the position of each set of initials in the Persons field. So, the two left-hand coloured bars represent Neil's Profile and Time, and the two right-hand bars represent Françoise's Profile and Time.

This information can also be analysed in the Employee Time Statistics report. Time Activities appear in the Actual column—

The Actual and Profile columns show partial hours as decimals, not as numbers of minutes.

In calculating the figures in these columns, all Calendar Activities are taken into account (except those whose Don't Show option has been selected). To Do and Timed To Do Activities are not included in the report, thus keeping Activities used for contact history purposes separate from those used for time management purposes. This removes the risk of including the same time twice in the report. The Activities representing the individual telephone calls all had a Task Type of To Do.

Note on Terminology

Throughout this chapter (as elsewhere in this manual), the word "Customer" is used to refer to a record in the Customer register. That record does not necessarily represent a firm that has purchased goods or services from your business.

As soon as contact is established between your business and a potential client, their details should be entered to the Customer register. Their relationship with you (e.g. "Prospect" or "Lead") should be registered using the Customer Classification field on the 'Contact' card of the Customer record.

The following phrases have sometimes been used to describe Activities of various kinds—

Phrase	Refers to an Activity where…
Calendar Activity	the Task Type is Calendar
To Do Activity	the Task Type is To Do
Timed To Do Activity	the Task Type is Timed To Do
Time Activity	the Task Type is Calendar and the Calendar option is Time (an Activity representing actual time spent in carrying out a task)
Profile Activity	the Task Type is Calendar and the Calendar option is Profile (an Activity representing the booking of planned [future] time)

Structure of the CRM module and Access Rights

This chapter describes Hansa's CRM features. It therefore covers the CRM module itself, the Activities register, the Calendar and the Task Manager. Several levels of access are possible—

- Granting users access to the CRM module will allow them to use the CRM features described in this chapter, but not the Calendar, Task Manager or Activities.

- To be able to use the Calendar, Task Manager or Activities, the user must explicitly be given access to the Calendar and Task Manager modules and the Activity register. The Calendar and Task Manager modules have been provided solely for the purpose of granting or denying a user access to these features: users will be able to open the Calendar and Task Manager from the Master Control panel at any time and while in any module.

- Users that have access to the Activity register will be able to open Activities from the Calendar and Task Manager (and by drilling down from many CRM reports). If you also want them to be able to open Activities that have been attached to other records, you will need to grant them access to the System module as well. It may be necessary to deny access to the other registers, settings and features in the System module.

Please refer to the 'System Module' chapter in Volume 1 of these manuals for a full description of controlling access to various modules using the Access Groups setting.

Settings

Introduction

Settings concerned with Hansa's contact and time management tools are located in the CRM module. To access them, use the Modules menu to enter the CRM module and then select 'Settings' from the File menu or click [Settings] in the Master Control panel. The 'Settings' list opens, listing the settings to be found in the CRM module—
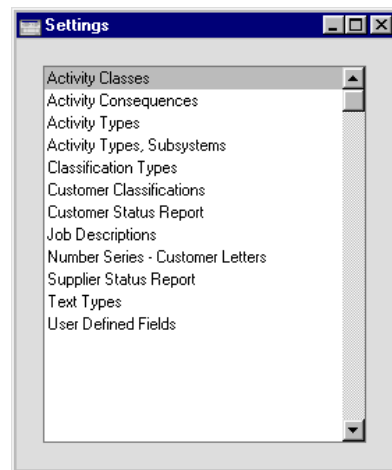
To edit a setting, ensure you are in the CRM module using the Modules menu and click the [Settings] button in the Master Control panel or select 'Settings' from the File menu. The list shown above appears. Then, double-click the relevant item in the list.

Activity Classes

Activity Classes are broad classifications of the various tasks recorded in the Activity register. Each Activity should be given an Activity Type, which should represent a specific job or task (e.g. sales call, sales appointment or internal meeting). In turn, Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) can be grouped together by assigning each one to the same Activity Class.
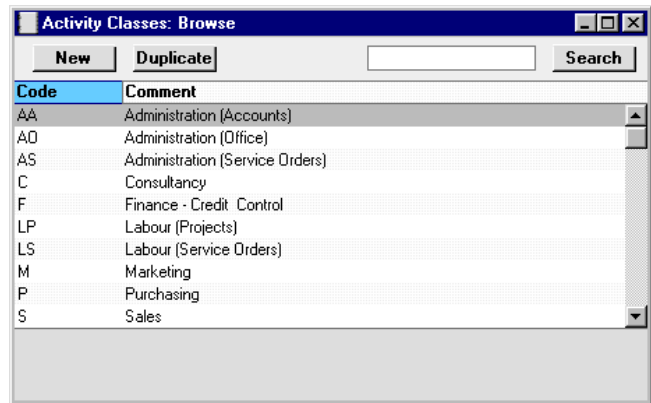
On double-clicking 'Activity Classes' in the 'Settings' list in the CRM module, the 'Activity Classes: Browse' window opens, listing the available Activity Classes. To enter a new record, click the [New] button in the Button Bar. The 'Activity Class: New' window appears: enter the details as appropriate and click [Save] to save the new record.

Code   This is the unique code that identifies this particular Activity Class. It can consist of up to five alphanumeric characters.

Calendar Colour   **Paste Special**   Choices of possible entries

All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. Choose that colour using this field.

Comment   Assign a descriptive name to the Activity Class. This is shown in the 'Activity Classes: Browse' window and the 'Paste Special' list.

Force Entry of   Check one or more of these boxes if you would like it to be compulsory for a Project, Customer, Result and/or Cost (Time) to be entered to all Activities with Activity Types belonging to this Activity Class.

Calendar   These options are used to control how the Activities with Activity Types belonging to this Activity Class are shown in the Calendar. Please refer to the section below describing the 'Task Type' card of the Activity screen for details of each option.

Employee Time Statistics

These options control how Activities with Activity Types belonging to this Activity Class are displayed in the Employee Time Statistics report.

Paid, Unpaid, Work, Absence

Choose the Paid/Work combination if you want Activities with Activity Types belonging to this Activity Class to be shown in the main section of Employee Time Statistics report and in the main totals for each employee.

If you choose any other combination (i.e. Paid/Absence, Unpaid/Absence, Unpaid/Work), then again the Activities are included in the main section of the report, but they have their own separate totals for each employee.

These options do not apply to the Overview version of the Employee Time Statistics report. Whatever the combination, all Activities are shown without distinction in the Overview.

Exclude from Time Statistics

> Use this option if you do not want Activities with Activity Types belonging to this Activity Class to be shown in the Employee Time Statistics report.

Create Project Transaction

> Check this box if you would like Project Transactions to be created when Activities with Activity Types belonging to this Activity Class are marked as Done and saved.

> This will be useful if you will be using Activities as an alternative to Time Sheets for time recording purposes (to record work carried out against Projects). The Project Transaction register is the mechanism by which instructions are conveyed to the invoicing routine as to how the time is to be charged to the Customer. This is fully described in the 'Job Costing' chapter in Volume 5 of these manuals.

> If this box is checked for a particular Activity Class, it is recommended that you also choose to Force Entry of Time and Project using the options above, and that the choice of Calendar options (above) is Time. Project Transactions will not be created from Profile and Don't Show Activities (but any Task Type can be used).

Activity Consequences

This setting is used to control the automatic creation of new Activities from old ones that have particular combinations of Activity Types and Results.

This can be useful when, for example, you make a sales call but find that the person you are calling is on holiday. In this situation, you can set up an Activity Consequence record that will automatically create a new Activity to remind you to call them again a few days later.

The feature can also be useful for credit controllers using the Activity register to organise debt chasing calls.

On double-clicking 'Activity Consequences' in the 'Settings' list in the CRM module, the 'Activity Consequences: Browse' window opens, listing the available records. To enter a new record, click the [New] button in the Button Bar. The 'Activity Consequence: New' window appears, as shown below. Enter the details as described and click [Save] to save the new record.

Header

Type, Result	**Paste Special**	Activity Types setting, CRM module

New Activities will be created when existing Activities with a particular combination of Activity Types and Results are saved. Use these two fields to specify that combination. Only a single Activity Consequence record can be saved for each Activity Type/Result combination.

Card 1

New Activity	**Paste Special**	Activity Types setting, CRM module

Specify here the Activity Type to be used in the new Activity record.

Each Activity Type can in turn belong to an Activity Class, which will determine which of the Calendar options will be selected by default in the new Activity.

New Person	**Paste Special**	Person register, System module

If the new Activity is to be carried out by a different Person, enter that Person's initials here. This might be useful for example when the chasing of a debt reaches the stage where it needs to be handed over to a more senior member of personnel. Leave the field blank if the new Activity is to have the same Person as that from which it was created.

Note that the Activity Consequence record will take its cue from the Person in the original Activity as it was last saved. So, the Person of the original Activity is changed, that record should be saved before the Result is entered. Otherwise, the new Activity could feature the wrong Person.

Days from now	Enter a number here to determine the Start Date of the new Activity. This will be calculated to be that number of days ahead of the Start Date of the original Activity.
Hours from now	In a similar manner to the Start Date described above, the Start Time of the new Activity can also be set to be a certain number of hours ahead of that of the original Activity.
With Comment	Any Comment entered here will be copied to the Text field of the new Activity.

Card 2

To Do	Check this box of you would like the Task Type of the new Activity to be To Do. Otherwise, the Task Types in the new and old Activities will be the same.
Copy Links	Check this box if you would like the attachments of the old Activity to be copied to the new one. Links to other Activities will not be copied.

In the example illustration above, whenever an Activity of Type "SD" (for "Sales Demonstration") and Result of "OK" is marked as Done and saved, a new Activity is automatically created for three days' time with a Type of "ST" (for "Sales Telephone Call"). The Private check box in the new Activity will be the same as in the old Activity. The old and new Activities will be linked to each other through the Attachments facility

Activity Types

Activity Types are used to classify Activities. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting). All Activities recording the same task should be given the same Activity Type. The Activity Type can be used as a search criterion in many of the reports in the CRM module.

In defining your Activity Types, you should define some that can be used for Results, allowing the classification of the outcomes of Activities. This is

particularly important if you are using Activity Consequences (described above).

The number of Activity Types should be kept small, and great care should be taken to make them mutually exclusive. Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) can be grouped together by assigning each one to the same Activity Class (described above).

The 'Activity Types: Browse' window lists the available Activity Types: to enter a new item, click the [New] button in the Button Bar. The 'Activity Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.

Code   This is the unique code that identifies this particular Activity Type. It can consist of up to five alphanumeric characters.

It is recommended that the Codes of all Activity Types of the same Class begin with the same character, so that they appear together in the 'Paste Special' list, making selection of the correct one easy.

Class	**Paste Special**	Activity Classes setting

Activity Types of a broadly similar nature (e.g. all those to do with sales, or all those to do with administration) should be grouped together by assigning each one to the same Activity Class (described above).

All Activities with Activity Types belonging to the same Activity Class will appear in the same colour in the Calendar. You can also force a Project, Customer, Result and/or Cost (Time) to be entered for Activities of the same Class.

Item	**Paste Special**	Item register

If an Item is specified here, it will be entered automatically to all Activities of this Activity Type. This will be useful if a Project Transaction is to be created from the Activity.

For example, if the Activity Type represents a particular type of work carried out on a Project or a Service Order, the Item Number of the Item representing the appropriate type of labour can be entered here to ensure it appears correctly in all Activities of this Type.

Only Service or Plain Items can be entered here.

Comment   Assign a descriptive name to the Activity Type. This is shown in the 'Activity Types: Browse' window and the 'Paste Special' list: it should therefore be descriptive enough to make the selection of the correct Activity Type easy for all users.

Activity Types, Subsystems

It is possible to have an Activity created automatically on the completion of another task. This feature is controlled using this setting.

Activities can be created using the 'Create Activity' function on the Operations menus of the Contract, Customer Letter, Purchase Invoice, Quotation, Work Order and Sales Order screens. The Activities will be given the Activity Type specified on the right.

In the case of Contracts, Customer Letters, Invoices and Purchase Invoices, Activities can also be created when records are approved and saved. Check the boxes on the left if you would like this to happen: they have no power over the 'Create Activity' function. Again, the Activities will be given the Activity Type specified on the right.

Check the Done box on the extreme right if you would like new Activities to be marked as Done when they are created from a particular register.

Check the Update Customer's Name on Contact Persons box if you would like changes to a Customer Name in the Customer register to be copied to the Contact Persons belonging to that Customer.

Classification Types

Classification Types are used to divide the Customer Classifications (described below) into groups.
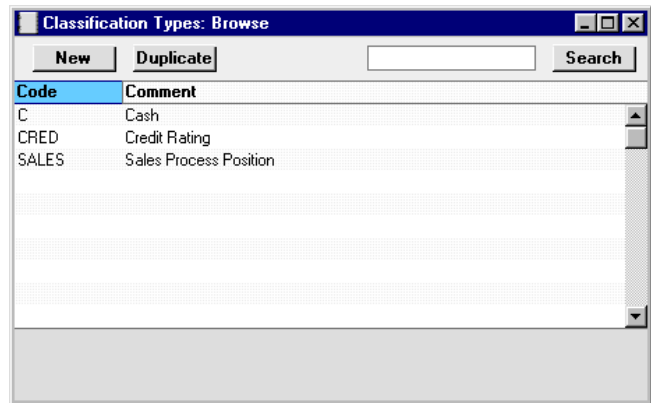
The 'Classification Types: Browse' window lists the available Classification Types: to enter a new item, click the [New] button in the Button Bar. The 'Classification Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.

Customer Classifications

This setting allows you to define any number of Classifications by which you can categorise your Customers, perhaps recording their relationship to you (e.g. lead, service customer or retail customer). This is done using the Class. field on the 'Contact' card of the Customer record. This field can contain one or more Classification Codes, separated by commas. So, for example, a particular Customer can be both a lead and have a credit rating of 3.

The Customer Classification provides a different means of classifying Customers compared with the Customer Category setting in the Sales Ledger. This will usually be used to record the types of business in which your Customers are engaged. In addition, each Customer may be allocated more than one Customer Classification, but can only belong to a single Category.

The Customer Classification can be used as a search criterion in many reports in the CRM module (and the EU VAT Sales report in the Sales Ledger).

Customer Classifications can be divided into Classification Types, allowing great flexibility. Classification Types are defined using another setting in this module.
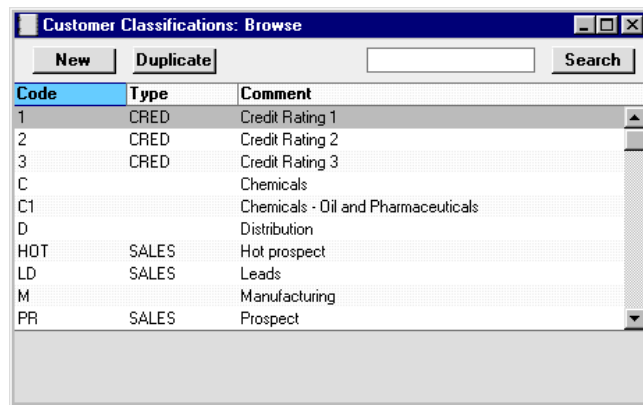
The 'Customer Classifications: Browse' window lists the available Customer Classifications: to enter a new item, click the [New] button in the Button Bar. The 'Customer Classification: New' window appears: enter the details as appropriate and click [Save] to save the new record. 'Paste Special' can be used from the Classification Type field to bring up an option list.

Customer Status Report

This setting is used to control the appearance of the Customer Status Report when produced using the Operations menu function of the 'Customers: Browse', 'Customer: Inspect' and 'Contact Person: Inspect' windows. The setting has no effect on Customer Status reports produced using the 'Reports' function in the Sales Ledger.

A separate record can be saved in this setting for each Person, so each user can customise the report to their particular requirements. These records are listed when first double-clicking 'Customer Status Report' in the 'Settings' list in the CRM module. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate].

The following window opens—

| User | Paste Special | Person register, System module |

Enter the user's initials in the User field, using 'Paste Special' if necessary. Hansa will prevent you from entering more than one record for a particular Person.

Card 1

Include Activities Check this box if Done Activities are to be included whenever the user entered to the field above produces a Customer Status report.

Include Not Done If Activities that are not Done are to be included as well, check this box. This means Activities of all kinds will be listed. This box has no effect if the Include Activities box is not checked.

Last Done Activities

Specify here the maximum number of Done Activities that will be shown in the report when produced by the Person in question. The most recent Done Activities will be shown. If the Include Not Done box is checked, all such Activities that are later than the earliest Done

Activity will also be shown. Leave the field blank to list all Activities.

Include Invoices   Check this box if Invoices are to be listed in Customer Status Reports produced by the Person entered in the User field above. You should also specify which Invoices are to be included by checking the All Open box and/or entering a number in the Last Paid Invoices field.

All Open   Check this box if open (unpaid) Invoices are to be listed.

Last Paid Invoices   If you want paid Invoices to be shown in the report, specify here how many are to be included.

Include Cheques   Check this box if you would like cheques received from each Customer to be shown in the report. The Include Invoices and All Open boxes must also be checked, and the Cheques module should be present.

Include Contract Quotations

Check this box if Contract Quotations are to be included whenever the user entered to the field above produces a Customer Status report.

Include Closed   Check this box if you want expired Contract Quotations to be included in the listing.

Number of Contract Quotations

Specify here the maximum number of Contract Quotations that will be shown in the report.

Include Contracts   Check this box if Contracts are to be included whenever the user entered to the field above produces a Customer Status report.

Contract Class   **Paste Special**   Contract Classes setting, Contracts module

Enter a Contract Class here to restrict the listing to Contracts belonging to that Class.

Include Not OK   Check this box if you want Contracts that have not been approved to be included in the listing.

Number of Contracts

Specify here the maximum number of Contracts that will be shown in the report.

Card 2

Include Monthly Balances (12 months)

Check this box if you want monthly sales totals for the past year to be shown in the report. This information is taken from approved Invoices.

Include Customer Item, No. of months

If you want to list the Items purchased by each Customer over a particular period, check the Include Customer Item box and enter the period in the No. of Months field. The check box will have no effect if the No. of Months field is blank. This information is taken from approved Invoices.

Include Quotations

Check this box if Quotations are to be included whenever the user entered to the field above produces a Customer Status Report. The check box will have no effect if the Number of Quotations field is blank.

Quotation Class   **Paste Special**   Quotation Classes setting, Quotations module

Enter a Quotation Class here to restrict the listing to Quotations belonging to that Class.

Number of Quotations

Specify here the maximum number of Quotations that will be shown in the report, starting with the most recent. No Quotations will be shown if you do not enter a number.

Include Orders

Check this box if Orders are to be included whenever the user entered to the field above produces a Customer Status Report. The check box will have no effect if the Number of Orders field is blank.

Order Class   **Paste Special**   Order Classes setting, Sales Orders module

Enter an Order Class here to restrict the listing to Orders belonging to that Class.

Number of Orders

Specify here the maximum number of Orders that will be shown in the report, starting with the most recent. No Orders will be shown if you do not enter a number.

To save a user's Customer Status Report setting, click the close box and elect to save changes.

Job Descriptions

This setting is a look-up table used by the Contact Person and Customer Letter registers.

It is possible to report on and mail Contacts based on their Job Description. It is therefore recommended that this setting be used not to record actual job titles (which vary from company to company) but generic job descriptions. This would enable you to report on or mail Contacts with similar roles but varying job titles.

On double-clicking 'Job Descriptions' in the 'Settings' list, the following window appears—

Enter each new Job Description on the first blank line and, when finished, click the [Save] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

Number Series - Customer Letters

Each Customer Letter has its own unique identifying number, based on a sequential series. When entering a new Customer Letter, the next number in the series is used. If required, you can have a number of such sequences running concurrently, perhaps representing different years or different departments.

Use this setting to define these sequences, or Number Series. The different series should not overlap. If no Number Series have been defined, Customer Letter Numbers will start at 1 and continue consecutively.

When entering records to the Customer Letter register, the next number in the first Number Series entered to this setting will be used as a default; change to the next number in any other Number Series using 'Paste Special'.

On double-clicking 'Number Series - Customer Letters' in the 'Settings' list, the following window appears—

Enter each new Number Series on the first blank line and, when finished, click the [Save] button in the Button Bar to save the changes. To close the window without saving changes, click the close box.

The N/L field common to all Number Series settings is not used in this instance.

Supplier Status Report

This setting is used to control the appearance of the Supplier Status Report when produced using the Operations menu function of the 'Suppliers: Browse' window.

A separate record can be saved in this setting for each Person, so each user can customise the report to their particular requirements. These records are listed when first double-clicking 'Supplier Status Report' in the 'Settings' list in the CRM module. To create a new record, click the [New] button in the Button Bar, or highlight a record in the list that is similar to the one that you are about to create and click [Duplicate].

The following window opens—

User	**Paste Special**	Person register, System module
	Enter the user's initials in the User field, using 'Paste Special' if necessary. Hansa will prevent you from entering more than one record for a particular Person.	
Include Invoices	Check this box if Purchase Invoices are to be listed in Supplier Status Reports produced by the Person entered in the User field above. You should also specify which Invoices are to be included by checking the All Open box and/or entering a number in the Last Paid Invoices field.	
All Open	Check this box if open (unpaid) Invoices are to be listed.	
Last Paid Invoices	If you want paid Invoices to be shown in the report, specify here how many are to be included.	

Include Goods Receipts

Check this box if Goods Receipts are to be included whenever the user entered to the field above produces a Supplier Status Report.

Include Monthly Balances (12 months)

Check this box if you want monthly purchase totals for the past year to be shown in the report. This information is taken from approved Purchase Invoices.

Include Supplier Item, No. of months

If you want to list the Items purchased from each Supplier over a particular period, together with quantities and totals, check the Include Supplier Item box and enter the period in the No. of Months field. The check box will have no effect if the No. of Months field is blank. This information is taken from approved Goods Receipts.

Include Orders   Check this box if Purchase Orders are to be included whenever the user entered to the field above produces a Supplier Status Report. The check box will have no effect if the Number of Orders field is blank.

Order Class   **Paste Special**   Purchase Order Classes setting, Purchase Orders module

Enter a Purchase Order Class here to restrict the listing to Purchase Orders belonging to that Class.

Number of Orders

Specify here the maximum number of Orders that will be shown in the report, starting with the most recent. No Orders will be shown if you do not enter a number.

To save a user's Supplier Status Report setting, click the close box and elect to save changes.

Text Types

When recording Activities, different standard texts from this setting can be included to reduce the typing load.

Code	Comment
AL	Admin Letter
BR	Sales brochure mailed
OT	Order telephone conversation
PL	Price list sent
RS	Reseller advice
ST	Sales Telephone Call
WC	Warranty claim
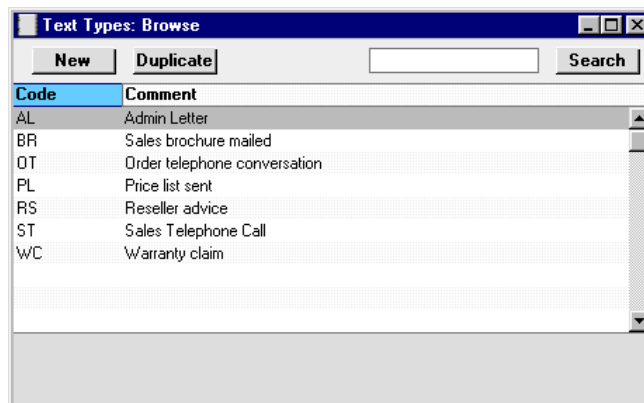
The 'Text Types: Browse' window lists the available Text Types: to enter a new item, click the [New] button in the Button Bar. The 'Text Type: New' window appears: enter the details as appropriate and click [Save] to save the new record.

User Defined Fields

Please refer to the 'Customers' chapter in Volume 1 for full details of this setting.

The Activity Register

All business events, appointments and tasks can be recorded as Activities. Through the careful use of Activity Types and Classes the Activity register can become a valuable source of information recording many different types of customer and other business related operations. Both past and future events can be recorded, so the register can be used as an efficient diary management tool.

Viewing Activities

Activities can be viewed in four ways—

1. From the monthly, weekly or daily Calendar view, double-click the coloured bar representing a particular Activity.

2. Having printed the Personal Calendar report to screen, click the Start Time or Activity Text of any Activity.

3. From the Task Manager, double-click the Activity Text of any Activity.

4. Users that have access to the System module can open the Activity register to view all the Activities that have been entered to the database.

In each case, the 'Activity: Inspect' window is opened, allowing to view the details of the Activity and to change it if required.

The Calendar, Personal Calendar report and Task Manager are all described later in this chapter.

Entering an Activity

Activities can be entered in many ways—

1. From any Calendar view, click the [New Activity] button in the top right-hand corner or use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. The Task Type of the new Activity will be Calendar, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.

2. When viewing an existing Activity, click the [Duplicate] button in the Button Bar or use the Ctrl-K (Windows and Linux) or ⌘-Y (Macintosh) keyboard shortcut. The Start Date of the copied Activity will be copied to the new one, but the End Date will be made blank.

3. Having printed the Personal Calendar report to screen, click the text "New Activity" at the top of the report. The Task Type of the new Activity will be Calendar, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time.

4. From the Task Manager, click the [New Task] button in the top right-hand corner. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will show the current date and time..

5. When working with Contracts, Customer Letters, Purchase Invoices, Quotations, Work Orders or Sales Orders, select 'Create Activity' from the Operations menu of the record window to create an Activity relevant to the record you are working with. The Task Type of the new Activity will be To Do, and the Symbol will be Other. The Start Date and Start Time of the new record will vary, depending on the register from which it was created. The Activity Type used is defined in the Activity Types, Subsystems setting. On selecting the function, the new record is opened in a window entitled 'Activity: Inspect'. This means that it has been saved and is been opened for checking. After amendment if necessary, save the record by clicking the [Save] button in the Button Bar. Alternatively, if you no longer require the Activity, select 'Delete' from the Record menu.

    Activities can also be created from Customers, Projects, Service Orders, Mails and Production records using the 'Create Activity' Operations menu function. In these cases, the new Activity will not be given a default Activity Type.

    The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record. When viewing the Activity or originating record, click the button with the paper clip image to open a list of attachments. Then double-click an item in this list to open it.

6. When working with Contracts, Customer Letters, Invoices and Purchase Invoices, Activities can be created when records are approved and saved. This is controlled using the Activity Types, Subsystems setting. Such Activities are created and saved, but are not automatically opened for checking or modification. Again, the Activity and the originating record will remain connected to each other through the Attachments facility.

When working with Sales Orders, Activities can be created when Orders are saved for the first time. This is controlled using the Order Classes setting. Such Activities are created and saved, but are not automatically opened for checking or modification.

7. From the browse windows listing Sales Orders, Service Orders and Contracts, you can highlight several records and select 'Create Activity' from the Operations menu. Separate Activities will be created for each highlighted record. On selecting the function, the new Activities are created and saved, but are not automatically opened for checking or modification. In the case of Sales Orders, the Activity Type of these new Activities will be taken from the Activity Types, Subsystems setting.

8. A new Activity can be created automatically from an old one when a Result is entered and it is saved. This depends on the Activity Type/Result combination and is controlled using the Activity Consequences setting. Such Activities are created and saved, but are not automatically opened for checking or modification. The old and new Activities will remain connected to each other through the Attachments facility.

Whichever method is used, when the Activity window opens, enter whatever relevant information you need to record about the event. In the case of future appointments, you will easily be able to return to the record to review it and mark it as completed at the appropriate time.

Since the amount of information stored about each Activity will not fit on a single screen, the Activity window has been divided into seven cards. At the top of each is the header. This contains the Text and Type and an indication of whether the Activity has been approved (completed). There are seven named buttons ('tabs') in the header.

By clicking the tabs you can navigate between the cards, and always go directly to a certain card. The header is always visible, so you can always identify the Activity you are working with.

Header

Text   A free text field to be used to describe the Activity.

              This Text will be shown in the Day Planner, Task Manager and in the Personal Calendar report.

Type	**Paste Special**	Activity Types setting, CRM module

Enter an Activity Type by which this Activity can be classified. Each Activity Type should represent a specific job or task (e.g. sales call, sales appointment or internal meeting).

Each Activity Type can in turn belong to an Activity Class (e.g. you might have a single Activity Class for all Types to do with sales, or all those to do with administration). The Activity Class will determine the colour of the bar representing this Activity in the Calendar, and can also force you to enter a Project, Customer, Result and/or a Cost (Time) (see below). It will also determine which of the Calendar options will be selected by default.

If an Item has been specified in the Activity Type record, this will be brought in to the Item field on the 'Project' card of the Activity. This will be useful when using Activities for time recording purposes: in this case the Item should be a Service Item representing the appropriate kind of labour that can be charged to the Customer.

Done

This check box is used to mark the Activity as done or finished. Planned or scheduled Activities should be entered without checking the Done box. As you complete these Activities, check the Done box and perhaps enter some notes in the grid area on the 'Text' card. In this way, you can easily maintain a 'To Do' list: by default, Activities that have been marked as Done will not be shown in the Task Manager.

Once an Activity has been marked as Done and saved, many fields such as the Start and End Dates and Times and the Person cannot be changed. If you realise that a Done Activity contains a mistake, open it and select 'Invalidate' from the Record menu. Red lines will be drawn through all the fields, and the Activity will be removed from the Calendar, Task Manager and all reports. Then click the [Duplicate] button in the Button Bar to create a new Activity without the mistake.

Time Card

Start Time	**Paste Special**	Current Time

The time when work on the Activity is to be or was started. The current time is filled in as a default. The 24-hour clock should be used. Once an Activity has been marked as Done and saved, the Start Time cannot be changed.

Start Date	**Paste Special**	Current Date

The date when work on the Activity is to be or was started. The current date is filled in as a default. Once an Activity has been marked as Done and saved, the Start Date cannot be changed.

End Time	**Paste Special**	Current Time

The time when work on the Activity was is to be or was finished. This field will gain a value automatically when a Result (below) is entered. Once an Activity has been marked as Done and saved, the End Time cannot be changed.

End Date	**Paste Special**	Current Date

The date when work on the Activity is to be or was finished. This field will gain a value automatically when a Result (below) is entered. Once an Activity has been marked as Done and saved, the End Date cannot be changed.

Cost (Time)
The overall time required to complete the Activity, calculated by Hansa once the Start and End Times and Dates have been completed. If this is not a true figure (perhaps there was a break for lunch, for example), it can be overwritten with the correct figure.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Time option is on, an entry must be made to this field before the Activity can be saved.

Once an Activity has been marked as Done and saved, the Cost (Time) cannot be changed.

The Cost (Time) is sometimes referred to as the Elapsed Time in this manual.

Task Type Card

Task Type   Use these options to specify the main purpose of the Activity—

    Calendar   Choose this option if the Activity is to appear in the Calendar and in the Employee Time Statistics report.

                    Typically, Calendar Activities are used for time management, scheduling and analysis. A Calendar Activity can represent either planned or actual time, and the Employee Time Statistics can be used to compare the two. If an Activity is to represent planned time, choose Profile from the Calendar options to the right. If it is to represent actual time, choose Time from those options. Choose Don't Show if the Activity is not to appear in the Calendar or the Employee Time Statistics report.

    To Do   Check this box if you would like this Activity it to be shown in the Task Manager. Usually this will be because the purpose of the Activity is to schedule a single task, such as a telephone call. The task is to be completed on a particular day, but the time is not important. To Do Activities will not be included in the Employee Time Statistics report. Instead, such Activities can be used to build up a contact history for each Customer.

    Timed To Do   Choose this option if the Activity is to appear in the right-hand panel of the Day Planner. Usually this will be because the purpose of the Activity is to schedule a single task for a specific time. Timed To Do Activities will not be included in the Employee Time Statistics report. Instead, such Activities can be used to build up a contact history for each Customer.

                    In all cases, if the Calendar option to the right is Time or Profile, the Activity must have both Start and End Times before it can be saved. The Calendar option has no other effect if the Task Type is To Do or Timed To Do.

Once an Activity has been marked as Done and saved, the Task Type and Calendar options can still be changed, providing the Activity has both Start and End Times.

As an example of how these options will be used, imagine you decide to spend an afternoon making sales telephone calls. You will probably book the afternoon in advance by entering a single Activity covering the whole afternoon in which the Task Type is Calendar. This will appear in your Calendar in the appropriate colour, showing how the afternoon is to be spent. This Activity should have Profile chosen as its Calendar option, since it represents planned time. Other members of the company will be able to view your Calendar and see that your time for the afternoon in question has been booked. When the afternoon's work is done, you will copy this Activity, change the times if necessary and change the Calendar option to Time. This will allow the Employee Time Statistics report to compare planned time with actual time. Turning to the individual telephone calls that you wish to make during the afternoon, you may have scheduled some of these in advance by entering separate Activities for each call to be made in which the Task Type is To Do or Timed To Do. Each of these Activities will have a Customer, Contact and Telephone Number. You will probably start the afternoon's work by viewing a list of these calls in your Task Manager or Day Planner and you will work through them, recording the details of each call and possibly making new Activities for follow-on tasks. You might also create similar Activities (again with a Task Type of To Do) as and when you make unscheduled telephone calls (e.g. if it is a cold-calling exercise). As the calls are completed, you will check the Done box of the appropriate Activity. This will remove them from the Task Manager or Day Planner. Their remaining use will be to form part of the contact history of the Customer in question.

The Employee Time Statistics report can be used to analyse the number of hours worked by each employee. This report is compiled from Calendar Activities only. All such Activities are included in the time calculations in this report except those whose Calendar option is Don't Show. In the example in the previous paragraph, therefore, the Activities representing the individual

telephone calls will not be shown in the Employee Time Statistics report, while the Time and Profile Activities representing the afternoon's work as a whole will. Provided the two sets of Activities are kept separated in this way (using the Task Type options), there is no risk of counting the afternoon's time twice in the report.

Calendar   These options are used to control how the Activity is shown in the Calendar. Usually these options apply only to Activities whose Task Type (above) is Calendar. The exception is that to charge the time to a Project, you must choose the Time option, but you can use any Task Type. These options can be changed once the Activity has been marked as Done and saved.

Time   This option should be chosen in an Activity that represents actual time spent in carrying out a task. It will then appear in the Personal Calendar report together with its Cost (Time) and in the Calendar with a solid colour bar.

If the Activity is one being entered to charge time to a Project, it must be a Time Activity, but it can be of any Task Type. Its Type must belong to an Activity Class whose Create Project Transaction box has been checked, a Project Transaction will be created when the Activity is marked as Done and saved. This Project Transaction is effectively an instruction to the 'Create Project Invoices' function to invoice the work represented by this Activity to the Customer. Please refer to the 'Job Costing' chapter in Volume 5 of these manuals for full details about Project Transactions and the 'Create Project Invoices' function.

Profile   This option can be used to book future time in the Calendar. Activities of this type appear in the Calendar as hollow coloured bars and to the left of those whose Time option has been selected. Time Activities have a solid colour bar. Profile Activities are shown on the Personal Calendar report with no Cost (Time).

Don't Show   Use this option if you don't want the Activity to be shown in the Calendar. It will still appear in the Personal Calendar report. Activities marked

as Don't Show will not be included in the time calculations in the Employee Time Statistics report.

It can be difficult to return to a Don't Show Activity after it has been saved, because it does not appear in the Calendar. You can drill down to it from the Personal Calendar report, or you can use the 'Filter' card of the Task Manager. Choosing the correct Task Type option here will cause all Calendar Activities to be listed, even those marked as Don't Show.

If an Activity Type that belongs to an Activity Class is specified, the chosen Calendar option will change to that set in the Activity Class. You can choose another Calendar option in a particular Activity, but take care to note that another option may be selected if you then change the Activity Type.

Symbol Card

Symbol   When an Activity is shown in the Task Manager, it can be accompanied by a small image so that you can see at a glance the type of work that it entails. The available images are—

Call	☎
Meeting	🖼
Deskwork	🖥
Other	(no image)

Customer Card

Customer   **Paste Special**   Customer register

Enter the Customer Number or use the 'Paste Special' function. If required, a Supplier Number can be entered instead, but Suppliers are not shown in the 'Paste Special' list. When you press Return, the Customer's or Supplier's name, Primary Contact and Telephone Number will be entered into the fields below. If you enter a Project on the 'Project' card (described below), the Customer details will be brought in automatically.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Customer option is on, an entry must be made to this field before the Activity can be saved.

Name   The Customer or Supplier Name is entered by Hansa after you have entered the Customer or Supplier Number.

Contact   **Paste Special**   Contact Person register, CRM module

Enter the name of a Contact Person or select one from the Contact Person register. The 'Paste Special' function only lists Contact Persons for the Customer in question. If a Contact has been entered to the Primary Contact field on the 'Contact' card of the Customer record or in the Contact field on the 'Contact' card of the Supplier record, this will be brought in as a default.

Phone   The Customer's or Supplier's Telephone Number is entered by Hansa after you have entered the Customer or Supplier Number.

Result   **Paste Special**   Activity Types setting, CRM module

Enter an Activity Type to show the outcome of the Activity. When you press Tab or Return, the Current Date and Time will be brought into the End Date and End Time fields respectively, if they are empty. When the Activity is marked as Done and saved, Hansa will try to find an Activity Consequence record for the particular Activity Type/Result combination that has been used. If one is found, a new Activity will be created, as determined by that Activity Consequence record.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Result option is on, an entry must be made to this field before the Activity can be saved.

Project Card

| Time | Task Type | Symbol | Customer | Project | Text | Persons |

Project

Item

Resources

Project   **Paste Special**   Project register, Job Costing module

Item   **Paste Special**   Item register

If the Activity is one being entered for time recording purposes, specify here the Project on which the work was carried out, and an Item representing the type of work carried out. The Item should be a Service or Plain Item. Customer information will be brought in to the Activity from the Project automatically.

If the Activity is a Time Activity, its Type belongs to an Activity Class whose Create Project Transaction box has been checked, and a Cost (Time) has been entered to the Activity, a Project Transaction will be created when the Activity is marked as Done and saved. The Activity can have any Task Type. This Project Transaction is effectively an instruction to the 'Create Project Invoices' function to invoice the work represented by this Activity to the Customer. Please refer to the 'Job Costing' chapter in Volume 5 of these manuals for full details about Project Transactions and the 'Create Project Invoices' function.

If the Activity Type of this Activity belongs to an Activity Class whose Force Entry Of Project option is on, an entry must be made to the Project field before the Activity can be saved. If an Item has been specified in the Activity Type, it will be brought in to the Activity automatically. If an Item has already been entered to the Activity, it will be changed or removed when an Activity Type is specified.

Text Card

Code	Paste Special	Text Types setting, CRM module

The grid area is useful for making notes about the Activity. The Text Types setting can be used to bring in certain generic comments: alternatively, leave the Code field blank and simply type some *ad hoc* text in the Text field. There is space for several rows of notes.

| Text | This field will contain the text for the Text Type. You may add any free text as appropriate. |

If you need to enter more than one line of text, keep typing. The cursor will move to the next line automatically when necessary.

Persons Card

	Time	Task Type	Symbol	Customer	Project	Text	Persons

Persons FF
Cc
Supervisor
Language
Priority ☐ Private

Persons   **Paste Special**   Person register, System module

The Person doing the Activity. The initials of the current user are entered as a default.

If the Activity is to be carried out by more than one Person, enter all appropriate initials, separated by commas. It will appear in all their Calendar views, Task Managers and Personal Calendar reports.

If you need to use 'Paste Special" to enter several sets of initials, type the comma before opening the 'Paste Special' list. This will cause Hansa to add the next set of initials to those already entered. Otherwise, the previous initials will be overwritten.

Once an Activity has been marked as Done and saved, the Person cannot be changed.

Cc   **Paste Special**   Person register

Enter the initials of anyone else that needs to know about the Activity (e.g. the person responsible for the Customer). Again, the initials of more than one Person can be entered, separated by commas. The Activity will appear in all their Calendar views and Personal Calendar reports, but it will only appear in their Task Managers if they so choose on the 'Filter' tab.

Supervisor   **Paste Special**   Person register

Enter the initials of the Person ultimately responsible for this Activity here. The Activity will not appear in their Calendar, Personal Calendar report or Task Manager.

Priority   You can grade the importance of each Activity using the Priority field. The Priority will be shown in the Task Manager, and you can reduce the list in the Task

Manager so that it shows Activities with a particular Priority only.

Private   Activities marked as Private will appear in your Personal Calendar and Activities, Customers reports, in the Task Manager and in any Calendar view when viewed by yourself, but not when viewed by any other user. They will also be excluded from most other reports when produced by other users. They can be viewed by users with access to the Activity register in the System module.

Once an Activity has been marked as Done and saved, the Private box can still be changed.

Creating Activities from other Registers

Many Activities will be created remotely from Contracts, Customers, Customer Letters, Purchase Invoices, Quotations, Work Orders, Projects, Service Orders, Mails, Production records or Sales Orders using the 'Create Activity' Operations menu function. The Activity and the originating record will remain connected to each other through the Attachments facility. This allows you to open the originating record quickly and easily when reviewing the Activity, or to open the Activity from the originating record. When viewing the Activity or originating record, click the [Attachments] button (with the paper clip image) to open a list of attachments. Then double-click an item in this list to open it.

For example, the following Activity was created from a Quotation—

The [Attachments] button with the paper clip image shows that the Activity has at least one attachment—

Click this button (or select 'Attachments' from the Record menu) to open a list of the objects attached to the Activity—

To open the Quotation, double-click the appropriate line in the list. The Quotation opens—

You can also open the Activity from the Quotation in a similar manner.

Completing an Activity

As you work your way through the Activities in your Task Manager, you will want to mark off each Activity as completed. As well as removing them from your Task Manager, this will have the effect of building up an accurate contact history for the Customers concerned.

To do this, follow these steps—

1. Open your Task Manager by clicking the [Tasks] button in the Master Control panel.

2. Double-click the Activity Text of the Activity that you are about to carry out. The Activity is opened, so you can remind yourself of the details.

3. When you have completed the task, click the Done box. If necessary, enter a Result and press Tab or Return. The End Date and End Time will be filled in automatically. Change to the 'Text' card to record any comments about the carrying out of the task in the grid area.

4. Click the [Save] button in the Button Bar to save the changes. Depending on how you have set up your Activity Consequences, a follow-up Activity may be created automatically. Finally, close the Activity using the close box. You will be returned to the Task Manager, from where you can repeat the cycle for the remaining Activities scheduled for the day.

5. If you don't need to add any notes to the Activity record, you can also complete an Activity from the Task Manager without opening it. Simply click in the Done column for the appropriate Activity and save the Task Manager (by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu). The Activity will be marked as Done and it will be removed from the Task Manager list. You can mark several rows as Done before saving.

Once an Activity has been marked as Done and saved, many fields such as the Start and End Dates and Times and the Persons cannot be changed. If you realise that a Done Activity contains a mistake, you can be delete it by selecting 'Delete' from the Record menu.

However, if the Activity Type belongs to a Class whose Create Project Transactions box has been checked, the Activity cannot be deleted. In this case, you should open it and select 'Invalidate' from the Record menu. Red lines will be drawn through all the fields, and the Activity will be removed from the Calendar, Task Manager and all reports. Then click the [Duplicate] button in the Button Bar to create a new Activity without the mistake.

The Task Manager

The Task Manager is a list of Activities sorted by Start Date and Time. Its main purpose is to list Activities that have not yet been completed to provide a check list of tasks to be undertaken. By default, only To Do Activities are included in the list. Usually, these will be Activities representing short tasks, such as telephone calls, that are to be completed on a particular day.

From the Task Manager, you can open an Activity by double-clicking the Activity Text. You can then remind yourself of the details of the Activity before carrying it out. When the task has been completed, you can mark the Activity as Done. When you save the Activity, it will immediately and automatically be removed from the Task Manager. If, as a result of carrying out the Activity, you need to schedule another one for a future time, this can also be done from the Task Manager.

To open the Task Manager, click [Tasks] in the Master Control panel—

The Task Manager for the current user (i.e. the Person signed in to Hansa for this work session) is opened, showing To Do Activities in Start Date and Time order. These are Activities whose Start Dates are the current date or earlier and whose Done boxes are not checked.

Header

Person, Type, Customer, Priority

> If the list of Activities is a long one, you can reduce it to show Activities of a particular Person, Type, Customer and/or Priority in any combination using the fields above the list. For example, to list sales calls, enter the appropriate Activity Type in the Type field and press Tab or Return. To further reduce the list to show top priority sales calls, enter the appropriate Priority Code in the Priority field and press Tab or Return once more.
>
> Your own Private Activities will be shown, but those of other users will not.
>
> You can use 'Paste Special' from the Person, Type and Customer fields to ensure the correct entry.

Activities Card

The main part of the Task Manager is a list of the Activities that are to be carried out by the end of the day (including Activities from previous days that have not been completed). Activities that have been marked as Done are not shown. The Activities are sorted by Start Date and Time, but you can change this by clicking on one of the column headings.

You can change the composition of this list in two ways—

1. You can use the fields in the header as described above.

2. You can use the radio buttons on the 'Filter' tab (described below) to add to the list Activities that would not be shown by default (e.g. Done Activities or Activities whose Task Types are not To Do).

Prio This column shows the Priority of each Activity (taken from the field on the 'Persons' card), and it also shows a small image determined by the Symbol option chosen for each Activity.

Done This column can be used to mark an Activity as Done once it has been completed. This will not be fed through to the corresponding Activity immediately: you must save the Task Manager (by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done and to remove it from the Task Manager list. You can mark several rows as Done before saving.

!

> *If you have marked any Activities as Done, remember to save the Task Manager before closing it.*

If you have used the options on the 'Filter' card (described below) to include Done Activities in the list, they will be shown with a tick (√) in the Done column.

Text   This column contains the Text from the header of each Activity. Double-click this Text to open the Activity record.

There will be a small arrow to the left of this Text if any notes and comments have been entered on the 'Text' card of an Activity. Click this arrow to read the comments. This has been done in the fourth row in the illustration above.

Supervisor   This column contains the Supervisor from the 'Persons' card of each Activity. If the Supervisor is empty, the Contact or Customer Name from the 'Customer' card is shown.

Phone   This column shows the Customer or Supplier Telephone Number from the 'Customer' card of each Activity.

Filter Card

By default, the Activities listed in the Task Manager have Task Types of To Do, are not Done and have Start Dates that are on or before the current date. Use the 'Filter' tab (in combination with the fields in the header) if you would like to change these settings.

Select   Use one of these options to list Activities with different Symbols.

Task Type   Use one of these options to list Activities with different Task Types.

Display   Use one of these options to list Activities with different Start Dates. The Next Week and Next Month options do not include the current date.

Incl. Done   Choose one of these options if you would like Done Activities to be listed (in addition to those that are not Done). The Done Activities will be shown with a tick in the Done column. You can choose to include all Done Activities, or those whose Start Dates are in the past month or year.

Persons   By default, the Task Manager lists the Activities entered for the Person whose initials appear in the header. This means those Activities with these initials in their Persons fields. Use these options to change this to the Activities with these initials in their Cc fields, or in both their Persons and Cc fields.

Button Bar

The Button Bar contains two buttons, as follows—

Day Planner   Click this button to open the Day Planner. This is described in the 'Calendar' section of this chapter below.

New Task   Click this button to create a new Activity. Its Task Type will be To Do, and its Symbol will be Other. You can also use the Ctrl-N or ⌘-N keyboard shortcut. When you save the new Activity, it will immediately and automatically be added to the Task Manager, providing it meets your chosen filter criteria.

Printing the Task Manager

To print a list of the Activities shown in the Task Manager, choose 'Print' from the File menu.

The Calendar

Opening the Calendar

The Calendar is useful for booking employees' time and for analysing employee time statistics. Every member of the company can see a particular individual's Calendar, so its graphical format makes it easy to check employees' availability and to schedule major tasks. Numerous reports (e.g. the Personal Calendar report, the Employee Time Statistics report and the Activities, Period report) are compiled using Calendar Activities and these again are useful scheduling and time analysis tools.

To open the Calendar, click the [Calendar] button in the Master Control panel—

When it opens, the Calendar shows the current month in the centre of the top row, the previous month and the next four months. This six-monthly format is one of the four ways of viewing the Calendar in Hansa. These four views are—

- The six-monthly view (known as the "Overview")

- The monthly view

- The weekly view

- The daily view (known as the "Day Planner")

The Four Calendar Views

The Six-monthly View (the "Overview")

In the Overview, the current date (November 4th in the illustration) is marked with a square and weekends are red.
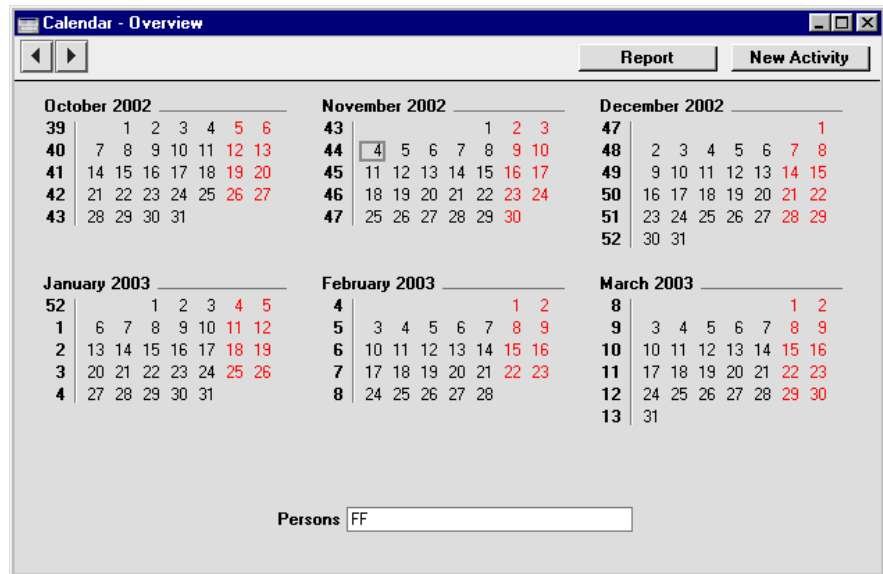
- To open the Overview, click the [Calendar] button in the Master Control panel.

- To change the months shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.

- To open a monthly view, double-click on the name of any month.

- To open a weekly view, double-click on the number of any week.

- To open the Day Planner, double-click on any date.

- To close the Overview, use the close box.

The Monthly View

In the monthly view, the current date (November 4th in the illustration) is marked with a thick border. Weekends shaded, with dates in red.
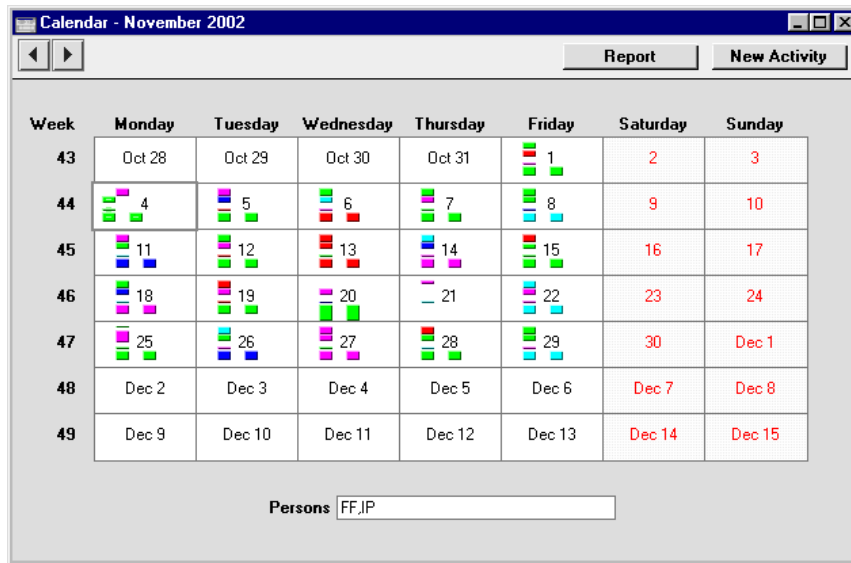
- To open the monthly view, double-click any month name in the Overview.

- To change the month shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.

- To open a weekly view, double-click on the number of any week.

- To open the Day Planner, double-click on any date.

- The Activities for each day are represented by coloured bars. These are solid for Time Activities and hollow for Profile Activities. Double-click any coloured bar to open the Activity. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.

- Activities for more than one Person can be shown. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last Person. Your Private Activities are shown, but other Persons' are not.

- To close the monthly view, use the close box.
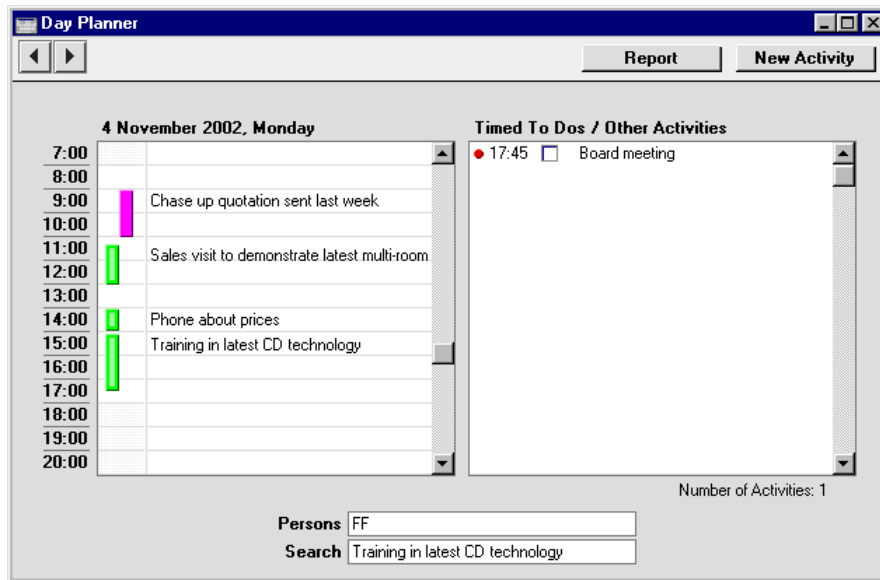
The Weekly View
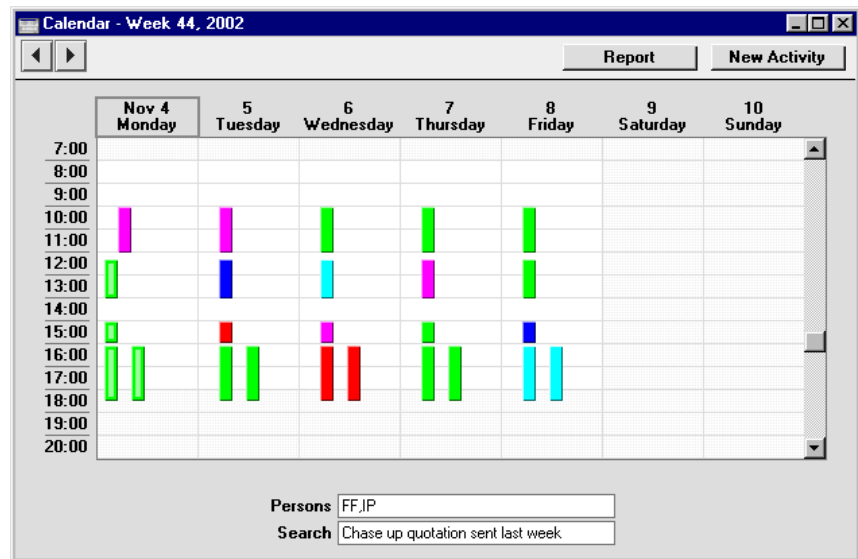
- To open the weekly view, double-click any week number in the Overview or monthly view.

- To change the week shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.

- To move to an earlier or later part of the day, use the scroll bar on the right-hand side of the window. Activities beginning at a time too early to be shown have an arrow at the top of their coloured bar, while those ending too late to be shown have an arrow at the bottom of their bar.

- To open the Day Planner, double-click on any date.

- The Activities for each day are represented by coloured bars. These are solid for Time Activities and hollow for Profile Activities. Double-click any coloured bar to open the Activity, or click once for its Text to appear in the Search field. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.

- Activities for more than one Person can be shown. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last

Person. Your Private Activities are shown, but those of other Persons are not.

• You can move an Activity to another time and/or date by dragging and dropping.

• To close the weekly view, use the close box.

The Daily View (the "Day Planner")

• To open the Day Planner, double-click any date in the Overview or in the monthly or weekly views, or click the [Day Planner] button in the Task Manager.

• To change the day shown, use the 'Next' and 'Previous' functions on the Record menu or the equivalent buttons on the left of the Button Bar.

• The Day Planner is divided into two sections. The panel on the left contains the day's Calendar Activities, represented by coloured bars. These are the same Activities that were visible in the monthly and weekly views. The coloured bars are solid for Time Activities (the first Activity in the illustration above) and hollow and to the left for Profile Activities (the second, third and fourth in the illustration). Double-click any coloured bar to open the Activity, or click once for its Text to appear in the Search field. The colours are determined by the Activity Class of each Activity. Only Calendar Activities are shown.

- To move to an earlier or later part of the day, use the scroll bar on the right-hand side of the left-hand panel. Activities beginning at a time too early to be shown have an arrow at the top of their coloured bar, while those ending too late to be shown have an arrow at the bottom of their bar.

- Activities for more than one Person can be shown in the left-hand panel. Enter each Person's initials (use 'Paste Special' if necessary) separated by commas in the Persons field and press the Return key. A separate column of coloured bars is shown for each Person. The left-hand column belongs to the first Person named in the Persons field and the right-hand column to the last Person. Your Private Activities are shown, but those of other Persons are not.

- The panel on the right lists Timed To Do Activities. This list only contains Activities for the Person whose initials appear first in the Persons field. As usual, your Private Activities are shown, but those of other Persons are not.

- In the right-hand panel, double-click the Activity Text to open an Activity.

- The check boxes in the Done column in the right-hand panel can be used to mark each Activity as Done once they have been completed. This will not be fed through to the corresponding Activity immediately: you must save the Day Planner (by pressing the Shift-Enter key combination or by selecting 'OK' from the Record menu) in order to mark Activity as Done. You can mark several rows as Done before saving.

! *If you have marked any Activities as Done, remember to save the Day Planner before closing it or changing to a different day.*

- To close the Day Planner, use the close box.

The [New Activity] button

Click the [New Activity] button in any Calendar view to enter a new Activity record. The Task Type in the new Activity will be Calendar, and the Symbol will be Other. The Person(s) in the Persons field of the Calendar view will be copied to the Persons field of the Activity. Please refer to the section entitled 'The Activity Register' above for full details.

The [Report] button

Click the [Report] button in any Calendar view to produce a Personal Calendar report. Please refer to the 'Personal Calendar Report' section below for full details.

If there are no Week Numbers

If dashes appear instead of Week Numbers in any of your Calendar views, the probable cause is that there is no record in the Weeks setting in the System module, or the record that is there is incomplete. In the latter case, if the current year has already been entered and the dashes remain, it is recommended that you delete the existing record and enter a new one, ensuring that the Country Code entered in the Weeks record is the same as that on the 'Reg' card of the Company Info setting. The Weeks setting is described in the 'System Module' chapter in Volume 1 of these manuals.

The Personal Calendar Report

The Personal Calendar report is effectively a report version of the Calendar. As with the Calendar, it shows Calendar Activities only. They are sorted into Start Date and Start Time order.

When printed to screen, the Personal Calendar has Hansa's Drill-down feature. Click on the Start Time or Activity Text of any Activity in the report to open that Activity.

To open the Personal Calendar report, click the [Report] button in the top right-hand corner of any Calendar view. The Personal Calendar is immediately printed to screen. The report period and Person are taken from the Calendar view from where the report was created. For example, if the report was produced from a weekly view, the report period will be the week shown in the view. The Activities shown will be those shown in the Calendar, with two exceptions: if the initials of more than Person are shown in the Calendar view separated by commas, the report will only show those Activities common to all those Persons, not all Activities for all Persons; and Activities marked as Don't Show, which are not shown in the Calendar, are shown in the report. As in the Calendar, your Private Activities are shown, but those of other Persons are not. For Time Activities, the Cost (Time) (i.e. the time taken to complete the Activity, or elapsed time) will be shown (together with a total at the bottom); no elapsed time will be shown for Profile Activities. The elapsed time figure shows partial hours as decimals, not as numbers of minutes. If an Activity has been marked as Done, "OK" will be shown to the right of the elapsed time.

Personal Calendar

Operations

Personal Calendar   Hansa, Print date: 4/11/2002 19:43
Radio Import/Export Ltd   Period 4/11/2002 : 4/11/2002
                                                                          FF

New Activity		Comment	Contact	
4/11/2002				
09:00:08	11:00:00	Chase up quotation sent last week		2.00
11:20:31	13:00:00	Sales visit to demonstrate latest multi-room stereo system		
				1.67
		Company: The American Dream Inc		
		Tel: 01768 868766		
		Contact: Mrs Williamson		
14:00:02	14:59:00	Phone about prices		0.98
		Company: New World Import/Export Co		
		Tel: 00 852 776 1234		
		Contact: Li Wuan Sok		
15:05:27	17:30:00	Training in latest CD technology		2.42
		In training room		
Number of Activities	4		Total Time	7.07

This screen version of the report contains a number of text buttons, as follows—

New Activity   Click this text (just underneath the report header) to create a new Activity. Its Task Type will be Calendar and its Symbol will be Other. On saving and closing the new Activity and returning to the report, select 'Recalculate' from the Operations menu. The new Activity will then be shown in the report, providing you did not change its Task Type.

Start Time, Activity Text

Click the Text of any Activity to open that Activity record.

To print the Personal Calendar to a printer, first print it to screen and then click the Printer icon or select 'Print' from the File menu.

You can also produce the Personal Calendar report by clicking the [Reports] button in the Master Control panel (or by selecting 'Reports' from the File menu) and then double-clicking 'Personal Calendar' in the 'Reports' list.

The Target Time Register

As described earlier in this chapter, Profile Activities have two purposes: they enable the booking of future time, and they allow this booked time to be compared with the time actually taken to complete the task in question. Profile Activities tend to be used in relation to specific tasks (for example, when sales appointments are booked, you will usually create separate Profile Activities booking the time for each appointment). Since their Task Type is Calendar, they are visible in the Calendar, so all employees can see that the time of the Person concerned has been booked.

The Target Time register can also be used to compare planned with actual time. In this register, the planned time is not related to specific tasks, and there is no impact on the Calendar.

Usually, Profile Activities will be used by the employees themselves to book future time, while the Target Time register will be used by managers to set targets for the amount of time their employees are to spend on work of each Activity Type. For example, the Target Time register might be used to specify that a sales person should spend 30 hours per week selling and 10 hours on administration. The sales person will create Profile Activities for each future sales appointment and Time Activities once those appointments have been fulfilled. The Employee Time Statistics report (described later in this chapter) can then be used to compare Target Time with Profile Activities, Target Time with Time Activities, or Profile Activities with Time Activities. An Activity must have a Task Type of Calendar to be included in this report.

Because the Target Time register is not related to specific tasks, it does not require much maintenance. In the example of the sales person in the previous paragraph, only one Target Time record is required. The targets in this record will be used every week by the Employee Time Statistics report. It will only be necessary to enter a second Target Time record if the number of hours to be spent on each Activity Type changes (e.g. to 25 hours per week selling, 10 hours on administration and five hours sales management).
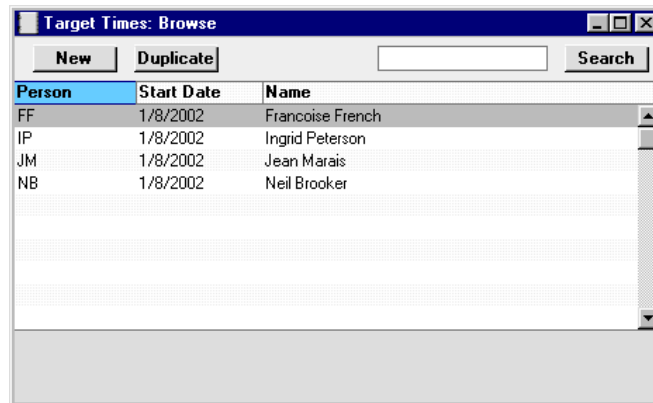
The period covered by a Target Time record can be a day, a week, a month or any other period of your choice. When the Employee Time Statistics report is produced, the number of hours in the Target Time record will be adjusted proportionally to fit in with the report period. In the example above, the period is a week. If the Employee Time Statistics report is produced with a report period of one week, the number of hours in the Target Time record will be shown in the report. If the report period is one month, the figure shown in the report will be the number of hours from the Target Time record

multiplied by four. If the report period is one year, the number of hours will be multiplied by 52.

Entering Target Time Records

1. In the CRM module, select 'Target Time' from the Registers menu (or click [Target Time] in the Master Control panel).

   The 'Target Times: Browse' window is opened, listing the records that have already been entered.

2. Click [New] in the Button Bar or select a Target Time record similar to the one you want to enter and click [Duplicate] in the Button Bar.

   The 'Target Time: New' window is opened, empty if you clicked [New] or containing a duplicate of the highlighted Target Time record.

	Act Type	Text	Period of Days	Hours
1	A	Admin	7	8
2	SV	Sales Visit	7	24
3	ST	Sales Telephone Call	7	8
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				

Person   **Paste Special**   Person register, System module

Enter the initials of the Person for whom you are setting targets, or use the 'Paste Special' function. When you press Return, the Person's name will be entered to the field below.

Name   The Person's Name is entered after you have entered their initials.

Start Date   **Paste Special**   Current Date

Specify here the date when the Target Time record is to take effect. It will remain in effect until a new Target Time record with a later Start Date is entered. Only one record for each Person/Date combination can be entered.

3. Use the grid area of the screen to specify the number of hours that it is intended that the Person will spend carrying out work of each Activity Type.

The Target Time record in the illustration above has a period of one week (shown in the Period of Days field). It specifies that every week the

employee is to spend eight hours doing administration, 24 hours making sales visits and eight hours making sales calls.

Act Type	**Paste Special**	Activity Types setting, CRM module

Enter an Activity Type for which a target is to be set.

Text	The Name of the Activity Type is entered after you have entered the Code.

Period of Days, Hours

The Period of Days is the period covered by the Target Time row, while Hours is the number of hours during that period to be spent carrying out work belonging to the Activity Type.

For example, if an employee is to spend eight hours per week working on administration, enter "7" as the Period of Days and "8" in the Hours field. If the Period of Days is "1", the target will be eight hours per day.

Both these fields must contain an entry in a particular row, otherwise the row will be ignored by the Employee Time Statistics report.

It is recommended that you use seven or a multiple of seven as the Period of Days. This will ensure that Employee Time Statistics report produces accurate results taking weekends into account. If you set daily targets, the report will apply these targets to Saturday and Sunday. If you enter "5" as the Period of Days, the report will contain incorrect targets if the report period is longer than five days.

4.   Once the Target Time record is complete, save it by clicking the [Done] button in the Button Bar. you can return to it at any time if you need to make changes.

Using Target Time Information

Each Target Time record contains targets for one Person for a period of time. In the example illustrated above, that period of time is a week. These targets will apply every week until a new Target Time record is entered.

Each Person should record the work actually carried out by entering Activities as described earlier in this chapter. Continuing the example shown

in the illustration above, when the employee in question (Françoise French) spends a day making sales telephone calls, she should enter a Activity recording the details of her day's work. For the example, Françoise enters Time Activities where the Task Type is Calendar recording her work as the week progresses. They are visible in Françoise's Calendar—
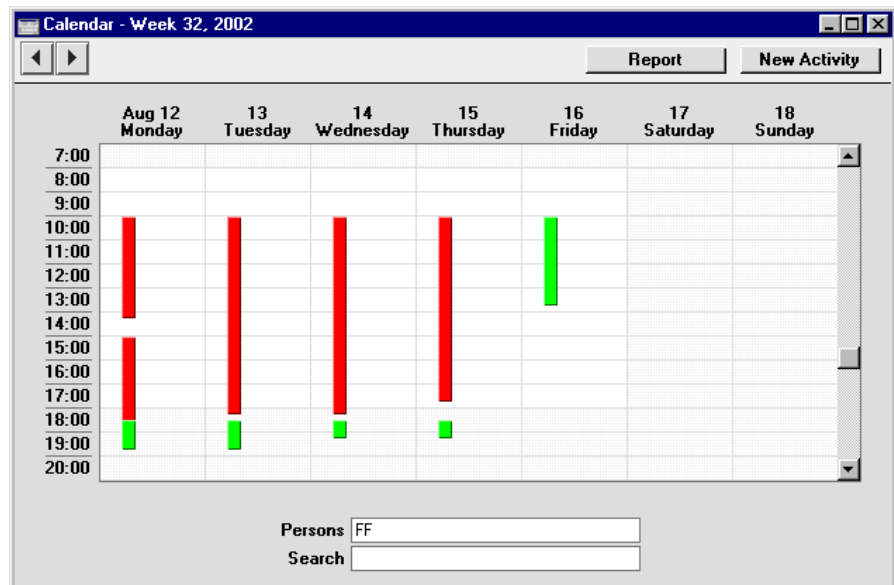
As always with Activities, a consistent and planned approach to the Calendar options (Time, Profile and Don't Show) is recommended. This process can be helped by attaching each Activity Type to an Activity Class in which the correct option has been selected. This will mean that Activities with a particular Type will always have the same Calendar option selected by default, reducing the chances of error (i.e. ensuring they will be taken into account correctly by the various reports).

At the end of the week, an Employee Time Statistics report can be produced. This report in the CRM module can compare the target time recorded in the Target Time register either with actual time recorded using Time Activities or with planned time recorded using Profile Activities. The accuracy of this comparison relies on the correct Calendar option (Time or Profile) being selected as appropriate, and on the Task Type being set to Calendar in these Activities.

In the specification window for the report, the week in question is entered as the report period and Françoise's initials are entered in the Employee field. In the example, we will compare Target Time with actual time, so Target/Actual is chosen as the Comparison—

To make the comparison, the report searches for Activities whose Start Date falls in the report period and for the Target Time record applying during the report period. This is the Target Time record with the most recent Start Date prior to the report period. The Per Type version of the report provides a concise analysis of the hours spent working on each Activity Type—

The Diff % column in the report shows that Françoise met her targets for Admin and Sales Visits, but fell slightly short of her target for Sales Calls. The Tot % column shows the percentage of actual time spent on each Activity Type.

For the next week, there is no need to enter a new Target Time record, providing the duties of the employee have not changed. The original record will be used by the report once again. Françoise continues entering Time Activities to record the work carried out. The report for the second week can be produced as described above.

A report can also be produced for the two-week period—

In this report, the Target Time is calculated using the formula—

Target Time = $\dfrac{\text{Hours (from Target Time row) x days in report period}}{\text{Period of Days (from Target Time row)}}$

For example, the Target Time for Sales Visits is 24 x 14/7 = 48. So a single Target Time record covering one week has been extended so that it applies to the whole two week period.

On Wednesday in the third week, Françoise's duties change. The eight hours per week that she did spend making sales calls is now to be spent on sales management. A new Target Time record is entered for her, dated Wednesday 21st August—

The Employee Time Statistics report for this third week shows the change. The report still contains a target for sales calls, for the first two days of the week, because the new Target Time did not take effect until Wednesday. Similarly, the target for sales management is reduced proportionally because this applied to the second half of the week only—

```
Employee Time Statistics                                        _ □ ×
      Operations          🖨                    [          ]   Search

Employee Time Statistics                       Hansa, Print date: 4/11/2002 20:09
Radio Import/Export Ltd                             Period  19/8/2002 : 25/8/2002
Per Activity Type                                             Employee FF
                                                              Target/Actual

Employee
    Act. Type                         Target Time    Actual    Tot. %    Diff %
FF       Francoise French
    ST       Sales Telephone Call          3.00       4.25    10.63      +41%
    SM       Sales Management              6.00       3.75     9.38      -37%
    A        Admin                         9.00       7.75    19.38      -13%
    SV       Sales Visit                  25.00      24.25    60.63       -3%
                          Total           43.00      40.00   100.00


    A        Admin                         9.00       7.75    19.38      -13%
    SM       Sales Management              6.00       3.75     9.38      -37%
    ST       Sales Telephone Call          3.00       4.25    10.63      +41%
    SV       Sales Visit                  25.00      24.25    60.63       -3%
                                          43.00      40.00   100.00
```

This new Target Time record will be used to set Françoise's targets from August 21st onwards, until her duties change once more. Both Target Time records will be used when the Employee Time Statistics report is produced for the month of August.
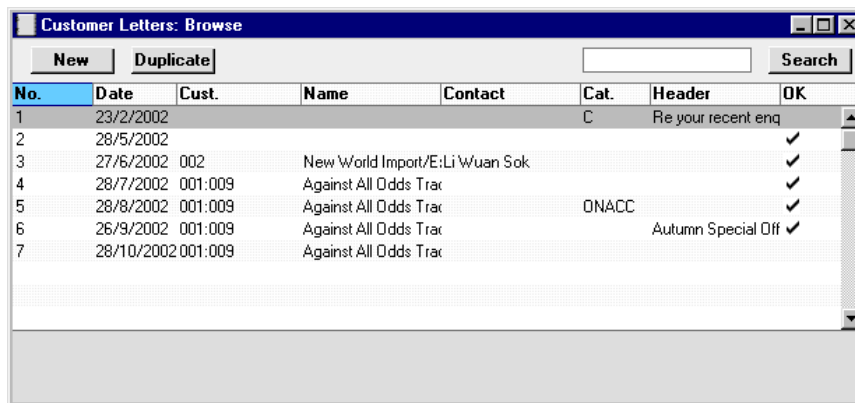
The Customer Letter Register

This register is used to send letters to Customers: it provides a mechanism whereby standard or *ad hoc* letter texts can be matched with one or more addresses. Letters can thus be sent to individual Customers or mailshots produced to a range of Customers.

Entering a Customer Letter

In the CRM module, select 'Customers Letters' from the Registers menu, or click the [Customer Letters] button in the Master Control panel.

The 'Customer Letters: Browse' window is opened, showing records already entered.
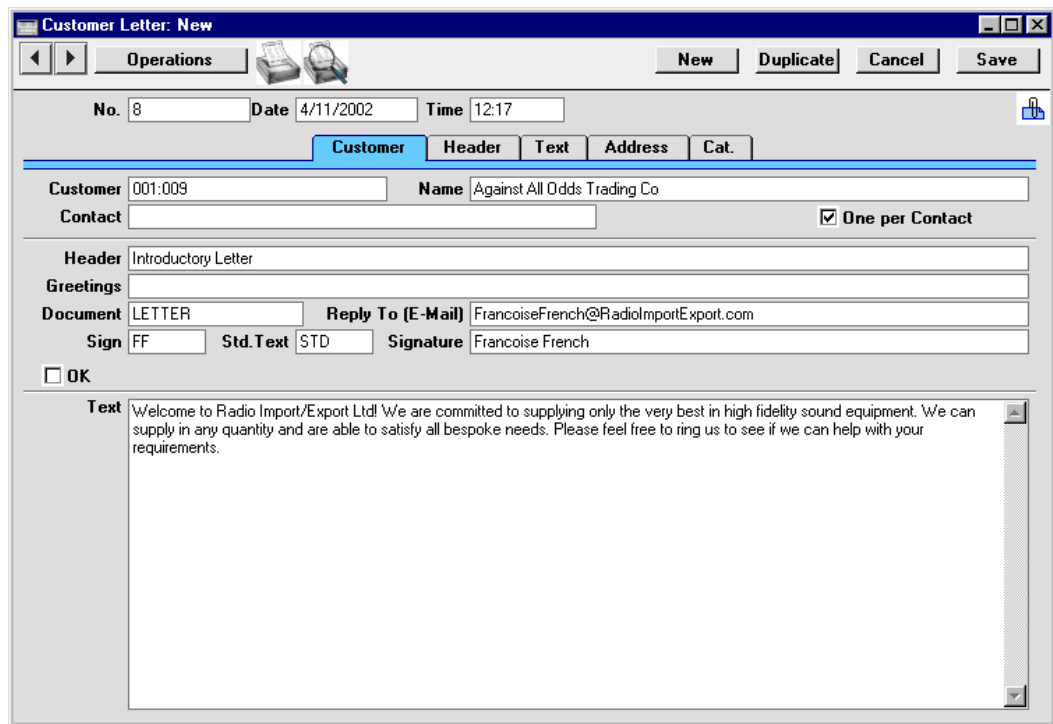
To enter a new Letter, click [New] in the Button Bar or use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. Alternatively, select a Letter similar to the one you want to enter and click [Duplicate] on the Button Bar.

The 'Customer Letter: New' window is opened, empty if you clicked [New] or containing a duplicate of the highlighted Letter. In the case of the duplicate, the Date and Time of the new record will show the current date and time, not those of the original Customer Letter.

Since the amount of information stored about each Letter will not fit on a single screen, the Customer Letter window has been divided into five cards. At the top of each is the header. This contains the Letter Number and Date. There are five named buttons ('tabs') in the header.

By clicking the tabs you can navigate between cards.

Header

No.	**Paste Special**	Select from another Number Series

This Number is the unique identifier for this Customer Letter record. When creating a new record, Hansa will enter the next unused number from the first record in the Number Series - Customer Letters setting. You may change this number, but not to one that has already been used. If you are working in a multi-user environment, the Customer Letter Number is assigned when the record is saved for the first time.

Date	**Paste Special**	Current Date

The date as it is to appear on the letter.

Time   This field records the time the record was originally created. It can be changed and can be made to appear on the printed letter if necessary.

Customer Card

This card is used in combination with the 'Cat.' card to select the Customers and Contacts to whom the letter is to be sent.

Customer	**Paste Special**	Customer register

Enter the Customer Number of the Customer to whom the letter is to be addressed. If the field is left blank, all Customers (except those marked as No Letters or No Mass Mailing on the 'Terms' card of their Customer records) will be mailed, subject to their satisfying any requirements entered to other fields.

It is possible to mail a range of Customers. To do this, enter the lowest and highest Customer Numbers of the

range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010". Note that an alpha sort is used, not a numeric one. Thus a range of 1:2 would also include 100, 10109, etc.

Customer Name If a single Customer Number has been entered to the field above, the appropriate Customer Name is shown here.

If a range of Customer Numbers has been entered to the field above, the name of the first Customer in the range is shown.

Contact **Paste Special** Contact Person register, CRM module

If a single Customer Number has been specified, it is possible to mail a particular Contact at that firm by entering their name here. The 'Paste Special' function only lists Contact Persons for the Customer in question.

If no Contact is specified here and the One per Contact check box below is not checked, a single letter will be produced for each selected Customer, addressed to the main Contact entered on the 'Contact' card of each Customer record.

One per Contact Check this box if you would like to print a separate letter for each Contact for each selected Customer (i.e. those in the Contact Person register and those entered on the 'Contact' card of each Customer record). Letters will not be printed for Contact Persons whose No Letters or Closed boxes have been checked.

If this box is not checked and no Contact is specified in the field above, a single letter will be produced for each selected Customer, addressed to the main Contact entered on the 'Contact' card of each Customer record.

If the check box is on, it will override any entries that have been made to the Contact Classification and Job Description fields on the 'Cat.' card.

Header Card

This card is used in combination with the 'Text' card to determine the text of the letter. The Header, Greetings, Sign and Signature fields can all be printed separately on the letter, perhaps with different font styling, and will contain appropriate information. 'Paste Special' can be used from the Sign field to obtain a list of personnel.

Reply To (Email) If the Customer Letter is to be sent by email using the 'Send Email' Operations menu function, specify here the return address (sender's address) that is to be used. If this field is empty, the return address will be taken from the Person record quoted in the Sign field or, if that is blank, from the E-Mail SMTP Server setting.

Document **Paste Special** Form register, System module

As is usual in Hansa, the printing of letters from a Customer Letter record is carried out either using the 'Documents' function or by clicking the Printer icon. However, the selection of the Form used (i.e. the letter template) is determined in a slightly different manner to that used by other documents in Hansa.

The most basic method of selecting the Form to be used is to do so using this field: simply enter the Form Code here.

However, it may be easier to use a single Form in most circumstances and to override that default only on special occasions. To do this, follow these steps—

1. Design a standard letter using the Form register in the System module. This process is fully described in the chapter in Volume 1 covering the System module and, with an example specific to letter design, in the 'Printing Customer Letters' section below. Use the 'Properties' function on the Operations menu of the Form editor to assign the letter a suitable

Form Code such as "LETTER". The Document Type should be "Customer Letters".

2. Change to the CRM module and open the 'Documents' list window using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.

3. Highlight 'Customer Letter' in the list and select 'Define Document' from the Operations menu. In the subsequent window, enter the Form Code ("LETTER", in our example) in the Form field on the first row. As is usual in Hansa, you can use the 'Define Document' window to determine that a different Form is to be used according to the Language or Number Series of the Customer Letter or the Access Group of the user.

4. Once this has been done, the "LETTER" Form (or other Form from the 'Define Document' window chosen on the basis of Language, Number Series or Access Group) will be used if the Document field on the 'Header' card of the Customer Letter record is blank. If you wish to use a different Form for a particular Customer Letter, specify that using the Document field. The Form specified in this field will be used instead of that specified in the 'Define Document' window.

Std. Text   **Paste Special**   Standard Text register, CRM module

If appropriate, use this field to select a Standard Text record. The text itself will appear in the field on the 'Text' card.

OK   The OK check box should be switched on once the Customer Letter record has been checked and approved. Until it has been switched on, any letters printed from the record will be marked as a "Test Printout". Once it has been switched on, you will no longer be able to modify the record, although if modifications subsequently become necessary the OK check box can be switched off again.

Two reasons for checking and approving a Customer Letter prior to approving it and preventing further

modification are to ensure the list of recipients is correct and to check the letter text contains no errors. These tasks can both be accomplished quickly and easily using the 'Letter List' function on the Operations menu.

References in this chapter to approved Customer Letters are to Customer Letters whose OK box has been checked.

Text Card

This shows the text of the letter. This can be brought in from the Standard Text register (in which case it can be modified here for this mailing only) or it can be written here as a one-off letter.

Address Card

If a single Customer has been specified on the 'Customer' card, its main address and fax will appear here. If the Contact Person has a different Address and Fax, these will be shown instead of those from the Customer. A default Email address will also be brought in from the Customer or Contact Person record.

These fields are only used if a single Customer has been specified and the One per Contact box is not checked. In this case, the address entered here will be printed on the letter. If the letter is to be sent by fax or email, the fax number or email address entered here will be used. If you need to change the address for a particular letter, you can do so here: such a change will not be fed back to the Customer or Contact Person.

When designing the Form to be used when printing the letter, several fields are available to print the address. The Address 1, Address 2, etc. fields contain each line of the address entered here. The Address field contains the whole of this address. The Contact Address field contains the address from the Contact Person record or, if that is empty, from the Customer record.

If more than one Customer has been specified in the Customer Letter, the address, fax number or email address will be taken from each Customer record in turn. If the One per Contact box is checked, they will be taken from each Contact Person record or, if blank, from the related Customer.

Cat. Card

This card is used in combination with the 'Customer' card to select the Customers and Contacts to whom the letter is to be sent.

Category   **Paste Special**   Customer Categories setting, Sales Ledger

If you wish to mail all Customers of a particular Category (or range of Categories), specify that here.

This field assumes that the Customer field on the 'Customer' card is blank: it will be ignored if the Customer field contains a value.

Language	**Paste Special**	Languages setting, System module

You can specify in the 'Define Document' window for the Customer Letter document that Letters can be printed using different Forms depending on the Language of the Customer Letter. Specify that Language here. Please refer to the description of the Document field on the 'Header' card above for more details about Form selection.

Cust. Class	**Paste Special**	Customer Classifications setting, CRM module

If you wish to mail all Customers with a particular Classification, specify that here.

If a range of Customers has been entered to the Customer field on the 'Customer' card, all Customers in that range that are of the particular Classification will be mailed.

Contact Class	**Paste Special**	Customer Classifications setting, CRM module

If you wish to mail all Contacts with a particular Contact Classification, specify that here.

This field assumes that the Customer field on the 'Customer' card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met.

Job Desc	**Paste Special**	Job Descriptions setting, CRM module

If you wish to mail all Contacts with a particular Job Description, specify that here.

This field assumes that the Customer field on the 'Customer' card contains a value and that the One per Contact box is not checked. It will have no effect if one or both these conditions are not met.

Inspecting and Approving Customer Letters

Before printing the letters as determined by a Customer Letter record, it is worth checking that the letter text contains no errors and that everyone that

should receive a letter will do so, especially if the Customer Letter record represents a large mailshot. To do this, use the 'Letter List' function on the Operations menu. This produces a report showing the full letter text and a list of recipients.

When everything is satisfactory, the Customer Letter record can be approved by checking the OK box. Once this has been done, you will no longer be able to change any details in the record. If it subsequently becomes necessary to make a change, remove the check from the OK box and save by clicking the [Save] button in the Button Bar.

Printing Customer Letters

Two methods are available by which the letters determined by a Customer Letter record can be printed. In both cases, if the Customer Letter record has not been approved, all printed letters will be marked "Test Printout". The two methods are—

1. With a Customer Letter record on screen, click the Printer icon.

2. Use the 'Documents' function (accessible using the function on the File menu or the button in the Master Control panel). Double-click 'Customer Letters' in the resulting list. This method allows you to print letters from a range of Customer Letter records.

In both cases, the letters are printed using a layout or template designed using the Form register in the System module. This layout or template should be designed to ensure the letters will be printed in your house style and that they fit on your headed stationery.

The design should take into account what is to happen when the printing of a letter requires more than one page. Usually, in such cases the address, date and greeting are printed on the first page only. This means the letter text might start higher up on the second and subsequent pages compared to the first page.

To design the letter template follow these steps—

1. Switch to the System module and select 'Forms' from the Registers menu or click the [Forms] button in the Master Control panel.

2. The 'Forms: Browse' window is opened, listing Forms already entered. To enter a new standard letter template, click the [New] button in the Button Bar; to modify an existing template, double-click it in the list.

3. In the case of a new Form, select 'Properties' from the Operations menu.

Enter an appropriate Code and, using 'Paste Special' from the Document Type field, classify the Form as a Customer Letter. This will ensure that you will only be able to include in the template those fields appropriate to letters.

You should now record how many lines of text are to be printed on each page of a multi-page letter. In the example we will use throughout this description, the first page has room for 34 lines of text, while the second and subsequent pages have room for 52. Type these figures in to the four fields under the heading of Matrix Rows On, as shown in the illustration.

These four fields are used as follows—

First	The first page of a multi-page document.
Middle	In a multi-page document, the pages between the first and last pages.
Last	The last page of a multi-page document.
Single	The sole page of a single-page document.

Usually, the First and Single page designs will be the same.

So, in this example, letters will be printed as follows, depending on the length of the letter text (i.e. on the number of lines)—

Lines of Text	Pages	Type of Page
Up to 34	1	Single
35-87	2	First and Last
88-139	3	First, Middle and Last
140-191	4	First, 2 x Middle, Last

When all fields are complete, click the [OK] button in the dialogue box to close it.

4. Usually, the First and Single page designs will be the same (a single page letter will have the same appearance as the first page of a multi-page letter). In this step, these pages (the First and Single pages) will be designed. Add fields and text objects as described below, so that the design ends up looking something like this—

To add a field to the design, click the [Field] button at the top of the window and then draw a box on the Form where the field is to appear. It can be moved or resized later if necessary. The 'Field' window opens—

Enter the Field Name (use 'Paste Special' to see all available Field Names for the "Customer Letter" Document Type), and paste a type style in the Style field.

The Exclude From Page options are used to set the page specification for each field. Check the Middle and Last of these options, to signify that each field will be printed on the First and Single pages (i.e. they will be excluded from the Middle and Last pages).

In the case of the field representing the letter text itself, enter "Text" as the Field Name, and complete the other details as follows—

Spacing	Since the letter text is likely to extend over more than one line, it is necessary to make an entry to the Spacing field. If this is left at 0 (the default), all the lines of the letter will be superimposed on one another. In the case of 10 point Times, a Spacing of at least 10 points is recommended.
Top, Bottom	Don't forget to ensure that the Text field is deep enough to accommodate the required number of lines of text in the specified font (34 lines in the example).
Field Argument	Entering a number here such as 90 (as in the illustration) will indicate that the maximum line width will be 90 characters (fewer if the 90th character occurs in the middle of a word).

Click the [OK] button in the dialogue box to save the field specifications, and repeat as necessary until all fields for the First and Single pages have been added.

Text objects can be added to the design in a similar manner, by clicking the [Text] button at the top of the window and then drawing a box on the Form where the object is to appear. When the 'Text' window opens, type the text that is to be printed on the Form in the Text field. This can be up to 80 characters long, but it is limited to one line. To create a text area with more than one line, use the appropriate number of separate one-line text objects.

As with fields, all the text objects that are to appear on the First and Single pages should have the same page specification set using the Exclude From Page options, as shown—
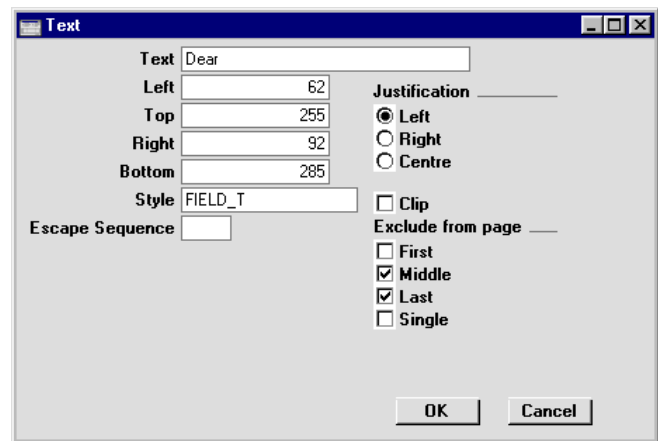
Click the [OK] button in the dialogue box to save the text object specifications, and repeat as necessary until all text objects for the First and Single pages have been added.

5. Now design the Middle and Last pages. In our example, they will be the same. To help with this, you can hide the objects added in step 4 above. To do this, select 'Middle Only' from the Operations menu. This displays only those objects that are to be printed on the Middle page. At this stage, there are no such objects, so the window goes blank. Add fields and text objects, so that the design looks something like this—
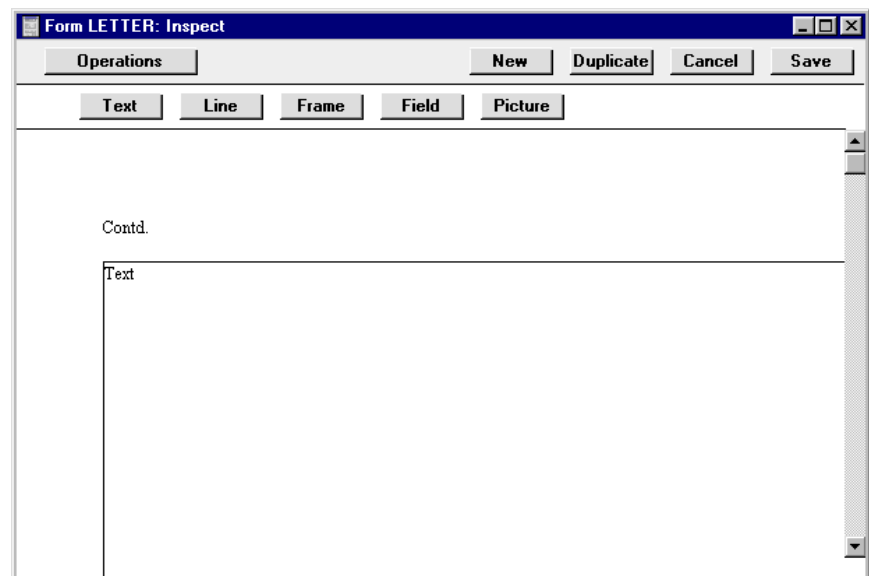
This time, use the Exclude From Page options to specify that each object will be printed on the Middle and Last pages (i.e. they will be excluded from the First and Single pages). In the case of the Text field, don't forget to ensure that it is deep enough to accommodate the required number of lines of text in the specified font (52 lines in the example)—

6. Now, choose 'View All' from the Operations menu. All objects from all pages are displayed. This confirms that the left-hand margins of all objects are correctly aligned—

Note how the Text field from the Middle and Last pages starts higher up the page than the Text field from the First and Single pages.

7. If any object is not aligned correctly, dragged it into position using the mouse, or double-click it to open its specification window and type in the correct co-ordinates.

8. When the design is complete, click the [Save] button in the Button Bar to save the Form.

9. Now you should inform Hansa that the template you have just designed is to be used when printing letters. For details about how to do this, please refer to the section earlier in this chapter describing the 'Header' card of the Customer Letter record.

Faxing Customer Letters

If you want to fax a letter instead of printing it and are using a Macintosh with a fax modem, follow these steps—

1. Having entered the Customer Letter as usual, select 'Documents' from the File menu.

2. Highlight 'Customer Letters' in the list.

3. Select 'Fax' from the Operations menu.

4. Double-click 'Customer Letters' in the list and proceed in the usual way.

If you have a fax server, you can configure a more permanent arrangement whereby certain Customer Letters are always faxed. Follow these steps—

i. Following the instructions in the 'System Module' chapter in Volume 1 of these manuals, enter a row representing your fax server in the Printers setting in the System module.

ii. In the CRM module, select 'Documents' from the File menu. Highlight 'Customer Letters' in the list and select 'Define Document' from the Operations menu. Enter a row with the appropriate Form and quoting your fax server in the Printer field. This row should have a dedicated Language (e.g. "FAX") in the Lang field or a dedicated Number Series in the Ser. No. field.

iii When you enter a Customer Letter that is to be faxed, ensure it has the correct Language on the 'Cat.' card or that you assign it a Number that is in the correct Number Series. A form must be specified in the Document field on the 'Header' card.

Note that any pictures included in the letter Form (i.e. PICT and EPS files) will not be faxed.

The fax number will be chosen in the same way as the address for printed letters: please refer to the section above describing the 'Address' card of the Customer Letter record for details.

Operations Menu

When a Customer Letter is open in a record window, the Operations menu is available.

Letter List

Select this command to produce a instant report showing the letter text and a list of recipients. Ensure you save the Customer Letter record by clicking the [Save] button in the Button Bar before using this function.

Send Email

This function will send the letter text to all recipients by email. The email addresses will be taken from the Contact Person or Customer registers as necessary. Each email address will be checked to see if it is valid (i.e. contains the @ character) before an email is sent to it. The return address (sender's address) will be taken from the Reply To (Email) field on the 'Header' card of the Customer Letter record, from the sender's Person record or from the E-Mail SMTP Server setting.

To use this function, the Customer Letter must be approved and saved, the External Gateway module must be in use, and the E-Mail SMTP Server setting must be configured. Please refer to the 'Mail' chapter for full details.

Create Activity

This function can be used to create Activities. This can be useful if it is necessary, for example, to schedule a print run. The Activity Type given to Activities created by this function will be taken from the Activity Types, Subsystems setting. The Task Type of the new Activities will be To Do, the Symbol will be Other and the Start Date will be the current date.

When the function is selected, the following screen appears, by which a new Activity record can be created—

A new record is opened in a window entitled 'Activity: Inspect'. This means that it has already been saved, and is being opened for checking. Any text in the Header field of the Customer Letter will be copied to the Text field of the Activity, while the initials in the Sign field of the Customer Letter will be copied to the Persons field of the Activity. After amendment if necessary, save the record in the Activity register by clicking the [Save] button in the Button Bar and close it using the close box. Alternatively, if you no longer require the Activity, remove it using the 'Delete' function on the Record menu. In either case, you will be returned to the Customer Letter window.

The Customer Letter and the Activity will remain connected to each other through the Attachments facility. This allows you to open the Customer Letter quickly and easily when reviewing the Activity, or to open the Activity from the Customer Letter. When viewing the Activity or Quotation, click the button with the paper clip image to open a list of attachments. Then double-click an item in this list to open it.

The Customer Letter does not have to be saved before creating an Activity.

You can choose to have an Activity created automatically when each Customer Letter is approved. Again, this is controlled using the Activity Types, Subsystems setting. An Activity will not be created using this method if a range of Customers has been entered in the Customer field in the Customer Letter record.

Please refer to the sections earlier in this chapter for full details of the 'Activity: Inspect' window and the Activity Types, Subsystems setting.

The Customer Register

Hansa's normal Customer register: please refer to the 'Customers' chapter in Volume 1 of these manuals for a full description. Note the use of the Classification field on the 'Contact' card of the Customer record: this is related to the Customer Classifications setting described above. Each Customer may have more than one Classification, separated by commas.

The Contact Person Register

When entering records to the Customer register, the name of the main contact person can be recorded using the Primary Contact field on the 'Contact' card of the Customer record. This name will be brought in as a default whenever the Customer is used in a Quotation, Order or Invoice.

If it is necessary to enter further Contact Persons, this can be done using this register, which is also available as a setting in the Sales Ledger. Then, when in the Attn. field of a Quotation, Order or Invoice, selecting 'Paste Special' will list all Contacts for the specified Customer, including the main contact.

To enter a new Contact Person, ensure you are in the CRM module and click the [Contact Persons] button in the Master Control panel or select 'Contact Persons' from the Registers menu. The 'Contact Persons: Browse' window appears, listing Contacts already entered.

Double-click on a row to open and change a Contact Person record, or click [New] in the Button Bar to create a new one.

Since the amount of information stored about each Contact will not fit on a single screen, the Contact window has been divided into two cards. At the top of each is the header. This contains the Customer Number and Name and the Contact Name. There are two named buttons ('tabs') in the header.

By clicking the tabs you can navigate between the cards, and always go directly to a certain card. The header is always visible, so you can always identify the Contact you are working with.

Header

Cust No.	**Paste Special**	Customer register

Enter the Customer Number or use the 'Paste Special' function. When you press Return, the Customer's name, address and other information will be entered into the appropriate fields.

Cust. Name   The Customer Name is entered after you have entered the Customer Number.

	If you would like this field to be updated automatically whenever the Customer Name is changed in the Customer register, check the Update Customer's Name on Contact Persons box in the Activity Type, Subsystems setting.
Department	The Department in which the Contact Person works.
Name	The name of the Contact Person.
Closed	Check this box if the Contact is no longer to be used. Closed Contacts will appear in the 'Contact Persons: Browse' window but not in the Contact Persons 'Paste Special' list. A closed Contact can be re-opened at any time. Letters will not be printed for Closed Contacts from the Customer Letter register.
No Letters	Check this box if you do not want letters to be printed for this Contact from the Customer Letter register.

Address Card

Address	Hansa will enter the address from the Customer record. Change to a personal or department address if necessary.
Tel, Fax	Entered by Hansa from the Customer record. Change as necessary.
	The 'Update Fax Numbers' Maintenance function in the System module can be used to remove spaces and dashes from all Contact Persons' Fax Numbers. This will be necessary if you will be sending faxes through the fax server, in which case fax numbers should not contain non-numeric characters.
Mobile	The Contact's mobile number.
Email	The email address of the Contact Person. This will be brought to any Customer Letters addressed to this Contact, allowing communication by email in future versions of Hansa.
Alt Phone	Any other contact number such as home telephone or personal fax number can be recorded here.
Date of Birth	The Contact's date of birth. The Birthday List report can be used to list Contacts with a particular birthday.

Comment Card

Comment	Any comment.
Specific Job Title	The Job Title of the Contact, as it appears on their business card. This can be included when addressing letters to Contacts.
Job Description	**Paste Special** Job Descriptions setting, CRM module

This field is used to describe the role of the Contact within their company. It should be used to side-step any slight differences in Job Title terminology that may exist in different companies. For example, the generic role of Finance Director might have "Director (Finance)" as its Job Title in one company but "Director of Finance" in another. The generic title ("Finance Director") would be placed in the Job Description field of such Contacts, to enable you to mail all Finance Directors together, irrespective of differences in inter-company terminology.

Classification	**Paste Special**	Customer Classifications setting, CRM module

This field can be used to mark each Contact with comments relevant to their role in the sales process, such as "Decision Maker" or "User".

As with the Classification field on the 'Contact' card of the Customer screen, more than one entry can be made to this field, separated by commas.

Salutation 1, 2 and 3

These fields can be used to record greetings with various degrees of formality. It is recommended that you enter Salutations in all three fields, even if they are the same.

When you design the Forms that will be used to print Customer Letters, you can include the Salutation 1, 2 or 3 field depending on the formality of the letter.

Printing Contact Person Details

When a Contact Person record is open, click the Printer icon to print a Contact List report for that Person. This shows contact details (telephone, fax and mobile numbers and email address).

Operations Menu

When a Contact Person is open in a record window, the Operations menu is available.
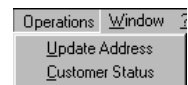
Update Address

Select this function to update the Contact Person with the latest Address and Telephone and Fax Number from the Customer record.

Customer Status

The 'Customer Status' function provides a short cut to the Customer Status report, otherwise only available in a less detailed form in the Sales Ledger.

In its basic form, this report shows address and turnover information and lists all Contact Persons for the Customer to whom the Contact Person currently
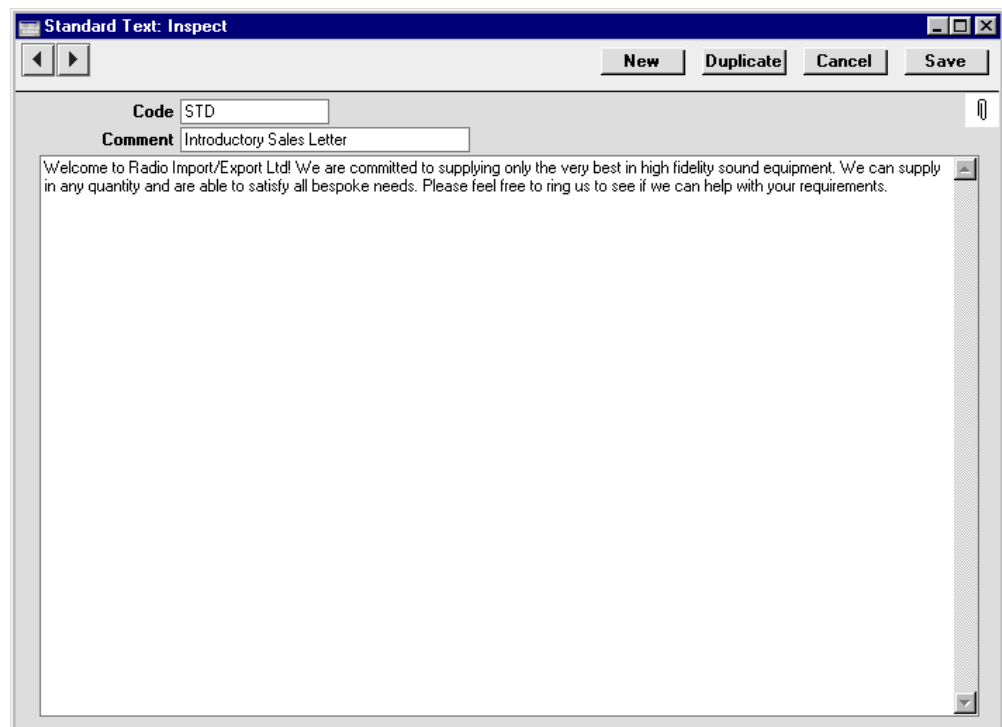
on screen belongs. However, if required, more information can be shown in the report, such as lists of recent Activities, Invoices, Contract Quotations, Contracts, Quotations and Orders, and monthly sales figures for the past year. Use the Customer Status Report setting in the CRM module to control how much of this additional information will be shown to different users, each of whom can be given a different report definition. Much of this additional information will not be shown if the report is produced from the 'Reports' function in the Sales Ledger.

The Customer Status report has Hansa's Drill-down feature. Many records such as Contact Persons, Quotations and Invoices can be opened by clicking in the appropriate places in the report.

The Standard Text Register

This register can be used to build up a library of standard letters to be used at particular stages in the development of the relationship with a Customer. These standard letters can be referred to from the Customer Letter register.

To enter a new Standard Text record, ensure you are in the CRM module and click the [Standard Texts] button in the Master Control panel or select 'Standard Texts' from the Registers menu. The 'Standard Texts: Browse' window opens, listing the available Standard Text records: to enter a new item, click the [New] button in the Button Bar. For each new Standard Text record, enter a Code and a descriptive Comment together with the letter text itself.

To save a Standard Text record, click the close box and elect to save changes.

Maintenance

Introduction

Maintenance functions tend to be used to carry out certain updating tasks, usually involving batch processing and encompassing all or many of the records in the affected register. There are three such functions available in the CRM module. To use them, select 'Maintenance' from the File menu. The following window appears—
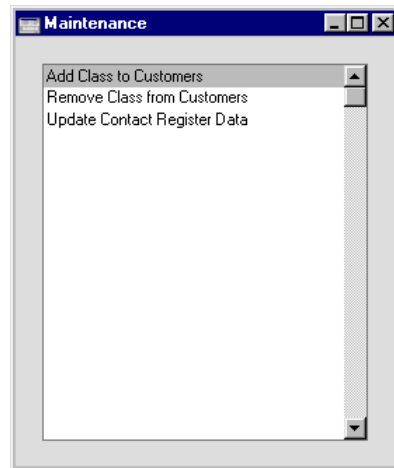
Double-click the chosen option. A specification window will then appear, where you can decide how the function is to operate. Click [Run] to operate the function.

Add Class to Customers

This function can be used to add a particular Customer Classification to the Customers that have bought or not bought a specific Item, or to Customers with Contracts containing or not containing a specific Item.

This can be useful if you want to mail these Customers. To do this, run this function and then create a Customer Letter record with the Classification in question on the 'Cat.' card. Alternatively, you can use the Classification to produce reports for this set of Customers. Once the Classification has served its purpose, you can remove it from these Customers using the 'Remove Classification' Maintenance function (described below).

You can run the Who Has Bought/Not Bought report before using this function if you want a list of the Customers that will be affected.

Category	Paste Special	Customer Categories setting, Sales Ledger

If a Customer Category is entered here, the function will search for the Customers belonging to that Category that have bought or not bought the specified Item. It will then add the new Classification to those Customers.

Salesman	Paste Special	Person register, System module

Enter a Person's initials for the new Classification to be added to all Customers with a particular Salesman that have bought or not bought the specified Item.

Classification	Paste Special	Customer Classifications setting, CRM module

If a Customer Classification is entered here the function will search for the Customers with that Classification that have bought or not bought the specified Item. It will then add the new Classification to those Customers.

If you enter a number of Classifications separated by commas, the function will search for the Customers with all the Classifications that you have entered.

Item	Paste Special	Item register

Specify here the Item that is to be the subject of the function: the new Classification will be added to all Customers that have bought or not bought this Item. The

function will have no effect if you do not specify an Item.

Add Classification **Paste Special** Customer Classifications setting, CRM module

Specify here the Classification that is to be added to every Customer that has bought or not bought the specified Item. If a particular Customer already has this Classification, it will not be added again.

Register Choose which version of the function is to be used.

Invoices The function will search approved Invoices to find Customers that have bought or not bought the specified Item.

Contracts The function will search the Contract register to find Customers that have Contracts containing or not containing the specified Item.

If you choose the Has Not Bought option (below), the function will ignore Customers with no Contracts at all.
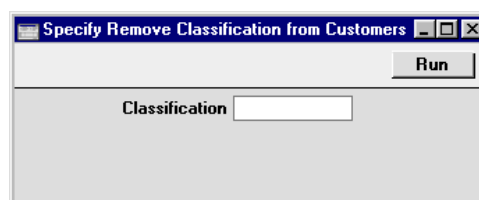
Function Choose whether the new Classification is to be added to Customers that have bought or not bought the specified Item.

There is a similar Maintenance function in the Sales Ledger, 'Update Customer Classification'. This has the advantage of allowing you to specify the Customers that will be affected, and to specify the period during which the Item should be purchased. It also allows you to add or remove Classifications to Customers that have bought or not bought any Item belonging to a specific Item Group. However, it does not offer the possibility of adding or removing Classifications based on Items covered by Contract.

Remove Classification

This function can be used to remove a Classification from all Customers.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Specify the single Classification that is to be removed from all Customers. If you want to remove more than one Classification, run the function as many times as necessary.

Press the [Run] button to start the updating process.

The 'Update Customer Classification' Maintenance function in the Sales Ledger can also be used to remove a specified Classification from Customers.

Update Contact Register Data

This function can be used to copy information from one field to another in every record in the Contact Person register.

Selecting the function brings up the following dialogue box—
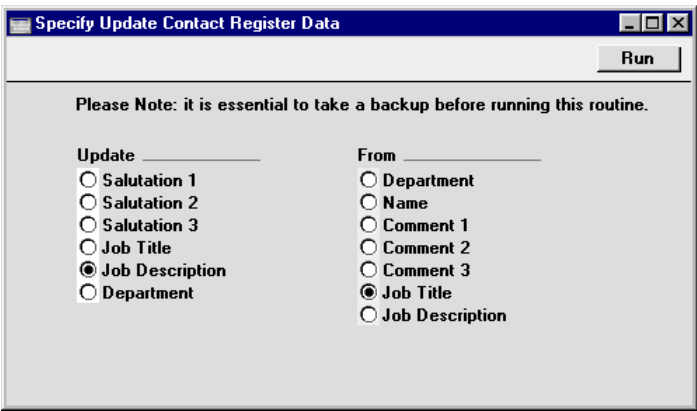
Choose one field to be updated from the set of options on the left. Choose the field that is to provide the information to be copied from the set of options on the right. In the illustration above, the information in the Job Title field in every Contact Person record will be copied to the Job Description field. The Job Title field will not be emptied. Click the [Run] button to update all Contact Persons.

Documents

Introduction

The 'Documents' function permits the printing in batches of particular documents or Forms. It is selected using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.

On selecting the function, the window illustrated below appears, listing the documents which can be printed from the CRM module. Each item in the list ("Document") will be printed using a different Form.
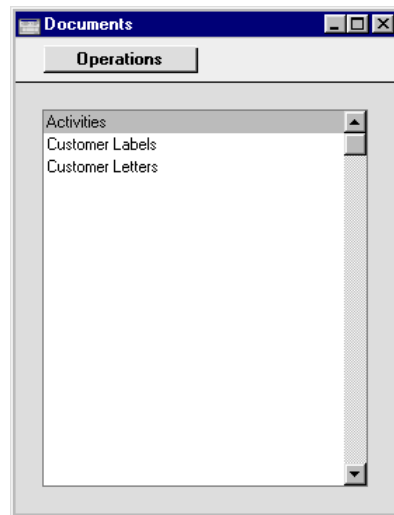
To print a document, follow this procedure—

1. Highlight the appropriate item in the list.

2. Using the Operations menu, determine the print destination of the documents. The default is to print to the chosen printer. Other options available are the Print Queue (see the chapter in Volume 1 entitled 'Hansa's Work Area' for full details of this feature) or Fax (if your hardware can support this feature).

3. Double-click the document name or press the Enter key. A specification window will then appear, where you can determine the information that is to be included in the printed documents (e.g. which Activities are to be

printed). The specification window for each document is described in detail below.

4.   Click [Run] to print the documents.

5.   Close the 'Documents' window using the close box.

To determine which Form is printed by each option in the 'Documents' window, follow this procedure—

1.   For each option, design a Form using the Form register in the System module. This process is fully described in the chapter in Volume 1 covering the System module.

2.   Change to the CRM module and open the 'Documents' list window using the 'Documents' item on the File menu or by clicking the [Documents] button in the Master Control panel.

3.   Highlight each item in the list and select 'Define Document' from the Operations menu. The subsequent window is used to assign a Form (or more than one Form) to each document and is fully described in the 'Documents' section of the 'Hansa's Work Area' chapter in Volume 1 of this manual. For example, each option can use different Forms determined perhaps by the Language of the Customer.

4.   For each document, the 'Define Document' function only needs be used once. After this has been done, Form selection will be automatic.

The selection process for each document is described below. In all cases, leave all the fields in the specification window blank if documents for all the records in the database are to be printed. If it is necessary to restrict the number of documents printed, use the fields as described.

Where specified below, it is often possible to report on a selection range, such as a range of Customer Numbers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010" in the Customer field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Activities

Use this document to print out hard copies of each Activity, perhaps for the files maintained for each Customer. It is also possible to print a single Activity while entering or viewing it by clicking the Printer icon, and to print it to screen by clicking the Preview icon.

Note that an entry must be made to at least one of the two fields below the Period, otherwise no Activities will be printed.

Period	**Paste Special**	Reporting Periods setting, System module

Enter the period for which you wish Activities to be printed. To print Activities for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customer No	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number (or range of Customer Numbers) to print Activities for a particular Customer.

Activity Type	**Paste Special**	Activity Types setting, CRM module
	Range Reporting	Alpha

Enter an Activity Type Code to print Activities of a particular Type.

Not Done, Done   Use these options to specify whether not Done and/or Done Activities are to be printed.

Customer Labels

This document prints name and address labels to Customers. The Invoice Address on the 'Contact' card of each Customer record is used.

The document is also available in the Sales Ledger and the Contracts module: please refer to the 'Customers' chapter in Volume 1 of these manuals for full details.

Customer Letter

This document prints letters to Customers. It first searches for records in the Customer Letter register matching the search criteria entered in the 'Specify Customer Letter Documents' window as described below. For each Customer Letter found, it then prints the letter text entered on the 'Text' card to the recipients as determined on the 'Customer' and 'Cat.' cards. Before printing, you can obtain a list of the recipients using the Letter List report.

Period	Paste Special	Reporting Periods setting, System module
		Subject to the other search criteria below, letters will be printed from all Customer Letter records whose Date falls in the period entered here.
No.	Range Reporting	Numeric
		To print letters from a specific Customer Letter record, enter its Number here. Alternatively, enter a range of Numbers separated by a colon (:). Remember that letters

printed from any unapproved Customer Letter records in the range will be marked with the text "Test Printout".

Category   **Pate Special**   Customer Categories setting, Sales Ledger

If a Customer Category is specified here, letters will be printed from all Customer Letter records with that Customer Category showing on the 'Cat.' card.

Remember that if a Customer Letter has a Customer Category on the 'Cat.' card and its Customer field on the 'Customer' card is blank, letters will be printed to all Customers belonging to that Category (except those marked as No Letters or No Mass Mailing on the 'Terms' card of their Customer records). However, if the Customer field on the 'Customer' card contains a value, letters will be printed to that Customer or range of Customers, irrespective of whether they belong to the Category.

Document Form   **Paste Special**   Form register, System module

Specifying a Form here will have two consequences. First, letters will be printed from all Customer Letter records with that Form specified in the Document field on the 'Header' card. Second, the letters will be printed using the Form specified here, not the Form specified in the 'Define Document' window as described in the introduction to this section.

Function   You can choose to print letters from all Customer Letters in the selection, or just from those that have not been used before. Make that choice using these options.

When designing the Form to be used when printing Customer Letters, two fields are available to print the Date. The Date field prints a short date (e.g. 1/1/2003). The Date with Month in Words field prints a longer date (e.g. 1 January 2003).

Reports

Introduction

As with all modules, to print a report in the CRM module, select 'Reports' from the File menu or click [Reports] in the Master Control panel. The keyboard shortcut Ctrl-R or ⌘-R can also be used. Then, double-click the appropriate item in the list.

The following reports are available in the CRM module—
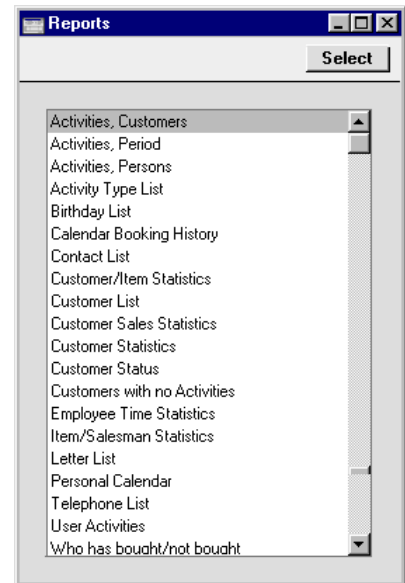
A specification window will then appear, where you can decide what is to be included in the report. Leave all the fields in this window blank if the report is to cover all the records in the database. If it is necessary to restrict the coverage of the report, use the fields as described individually for each report.

Where specified below, it is often possible to report on a selection range, such as a range of Customers. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Customers 001 to 010, enter "001:010" in the Customer field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Using the options at the bottom of the specification window, determine the print destination of the report (the default is to print to screen). You can initially print to screen and subsequently send the report to a printer using the Printer icon.

Once you have entered the reporting criteria and have chosen a print destination, click [Run].

With a report in the active window, the 'Recalculate' command on the Operations menu can be used to update the report after making alterations to background data. The 'Reopen Report Specification' command on the same menu can be used to update the report using different reporting criteria.

Activities, Customers

This report lists Activities of all Task Types, sorted by Customer. The Private Activities of the Person producing the report are marked with an asterisk (*). The Private Activities of other users are not shown in the report.

When printed to screen, the Activities, Customers report has Hansa's Drill-down feature. Click on a Person's initials to produce an Activities, Persons report for that Person, or on an Activity Number to open the Activity record.

Period	**Paste Special**	Reporting Periods setting, System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customers	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

Person	**Paste Special**	Person register, System module

Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered.

Activity Type	**Paste Special**	Activity Types setting, CRM module

Enter an Activity Type to list Activities of that Type.

Customer Cat.	**Paste Special**	Customer Categories setting, Sales Ledger

Enter a Category Code to list Activities featuring Customers in a particular Category.

Project	**Paste Special**	Project register, Job Costing module

Enter a Project Number to list the Activities relating to that Project.

Class	**Paste Special**	Activity Classes setting, CRM module

Enter an Activity Class to list Activities with Activity Types belonging to that Class.

Priority Enter a Priority to list Activities with that Priority.

Function Use these options to control the level of detail featured in the report. In both cases, the report is sorted by Customer.

Overview This report contains a single row per Activity, showing Date, Activity Type, Person, Contact and Text (from the Activity header).

Detailed In addition to the information shown in the Overview, this option shows all details entered in the grid area on the 'Text' card of the Activity screen.

Specify Use these options to determine whether the report is to contain only Done Activities, not Done Activities or both.

Show Customer Details

Check this box if you would like the Invoice and Delivery Address, Telephone and Fax Numbers, Short Code, Sort Key, Category, Classification, Payment Terms, Department, Object, VAT Registration Number, Comment and Warning of each Customer to be included in the report.

Show Contact Details

Check this box if would like Telephone, Fax and Mobile Numbers from Contact Person records to be shown in the report. To use this option, you must also choose to print the Detailed version of the report.

Show Activities without Type only

Activities that do not have an Activity Type will be included in the report. If you want to list these Activities only, use this option.

Activities, Period

Using the Display Groups setting in the System module, you can divide the employees of your company into groups. These groups might represent different types of work or the various departments in your company. The report uses a timetable format to display what each member of a particular Display Group is doing for each day of the report period. The information is taken from Calendar Activities.

The example report illustrated below shows the Calendar Activities of the members of the "Sales" Display Group for the second week in November. The descriptions come from the Text field in the header of each Activity. The report uses the default working day of 8:00 - 18:00. An Activity is listed separately for each Person included in the Persons and Cc fields. If a Person has more than one Activity beginning during an hour, only the earliest one is shown. Private Activities will be shown in the report.

The 'Specify Activities for Period' window is opened when you double-click 'Activities, Period' in the 'Reports' list—

Period	**Paste Special**	Reporting Periods setting, System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Display Group   Enter the Display Group: the report will show the Activities of all Persons belonging to that Display Group. A Display Group must be specified, otherwise no report will be produced.

Time Class	**Paste Special**	Time Classes setting, Job Costing module

As a default, the report displays Activities whose Start Time is between 8:00 and 18:00. If you want to use a different working day (e.g. 9:00 - 17:00), set this up in a Time Class record and then quote this Time Class when producing the report.

Show   Use these options to determine whether the report is to contain only Time Activities, Profile Activities or both.

Activities, Persons

This report lists Activities of all Task Types, sorted by Person. The Private Activities of the Person producing the report are included, but those of other users are not.

When printed to screen, the Activities, Persons report has Hansa's Drill-down feature. Click on a Customer Number to produce an Activities, Customers report for that Customer.

Period	Paste Special	Reporting Periods setting, System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Person	Paste Special	Person register, System module
	Range Reporting	Alpha

Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included.

Customers	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered.

Activity Type	**Paste Special**	Activity Types setting, CRM module

Enter an Activity Type to list Activities of that Type.

Display Group   If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group.

Function   Use these options to control the level of detail featured in the report. In both cases, the report is sorted by Person.

     Overview   This report contains a single row per Activity, showing Date, Activity Type, Person, Contact and Text (from the Activity header).

     Detailed   In addition to the information shown in the Overview, this option shows all details entered in the grid area on the 'Text' card of the Activity screen.

Specify   Use these options to determine whether the report is to contain only Done Activities, not Done Activities or both.

Activity Type List

This report is a list of the Activity Types recorded in the database, showing Code, Name, Item and Activity Class.

Class	**Paste Special**	Activity Classes setting, CRM module
	Range Reporting	Alpha

Enter an Activity Class to list the Activity Types belonging to that Class.

Sorting	Choose whether you would like the report sorted by Activity Type or by Activity Class.

Birthday List

This report can be used to list all Contact Persons sharing a birthday. The report is compiled from information in the Date of Birth field on the 'Address' card of each Contact Person record. As well as the birthday of each Contact, the report shows their Name, Title, Address, Telephone, Fax and Mobile Numbers, Email Address, Department and Customer Number and Name.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Customer Number to open an individual Customer record.

Period	**Paste Special**	Reporting Periods setting, System module

The report will list all Contact Persons whose birthday falls in the period specified here. For example, if the period is 1/6/2002:30/6/2002, the report will list all Contact Persons whose birthday is in June. The year is not used.

If you want to produce a report for a single day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customer Category

Paste Special	Customer Categories setting, Sales Ledger

Enter a Customer Category to show Contact Persons belonging to Customers with that Category.

Customer	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number to list the Contact Persons that work for that Customer.

Show Closed	Check this box if you would like Closed Contact Persons to be included in the report.

Calendar Booking History

This report is a list of Calendar Activities comparing the dates the records were created with their Start Dates.

When printed to screen, the Calendar Booking History has Hansa's Drill-down feature. Click on an Activity Number to open the Activity record. Private Activities are shown in the report, but drill-down will be disabled for them.

Period	**Paste Special**	Reporting Periods setting, System module

Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.

Customer	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

Activity Class	**Paste Special**	Activity Classes setting, CRM module
	Enter an Activity Class to list Activities with Activity Types belonging to that Class.	
Activity Type	**Paste Special**	Activity Types setting, CRM module
	Enter an Activity Type to list Activities of that Type.	
Person	**Paste Special**	Person register, System module
	Range Reporting	Alpha
	Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included.	
Display Group	If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group.	
Sorting	The report contains separate sections for the Activities of each Person. Choose one of these options to specify the order in which the Activities are to be listed in those sections.	
Calendar Type	Use these options to determine whether the report is to contain Time Activities, Profile Activities and/or Don't Show Activities.	

Contact List

This report lists Contacts in the Contact Person register, together with contact details (telephone, fax and mobile numbers and email address).

A Contact List report for a single Contact Person can be printed from their record in the Contact Person register by clicking the Printer icon.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Contact Name to open an individual Contact Person record.

Classification	Paste Special	Customer Classifications setting, CRM module

Enter a Classification to list Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be listed.

Customer Category

	Paste Special	Customer Categories setting, Sales Ledger

Enter a Customer Category to list Contact Persons belonging to Customers with that Category.

Contact Person	Paste Special	Contact Person register, CRM module

Enter Contact Person's name to print their details only.

Function These options control how much information is shown in the report.

Overview This option shows the name of each Contact Person, together with contact details (telephone, fax and mobile numbers and email address).

Detailed In addition to the information shown in the Overview, this option also shows the full address for each Contact together with Customer Code, Comment, Title, Job Description and Contact Classification.

Customer/Item Statistics

Please refer to the 'Items and Pricing' chapter in Volume 1 for full details of this report.

Customer List

Please refer to the 'Customers' chapter in Volume 1 for full details of this report.

Customer Sales Statistics

Please refer to the 'Customers' chapter in Volume 1 for full details of this report.

Customer Statistics

Please refer to the 'Customers' chapter in Volume 1 for full details of this report.

Customer Status

Please refer to the 'Customers' chapter in Volume 1 for full details of this report.

Customers with no Activities

This report is a list of Customers that have not been contacted during the report period.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Customer Number to open an individual Customer record.

Period	**Paste Special**	Reporting Periods setting, System module

Enter the report period: the report will list the Customers for whom there are no Activities with a Start Date that falls within that period.

Activity Type	**Paste Special**	Activity Types setting, CRM module

If an Activity Type is entered here, the report will list the Customers for whom no Activities of that Type were recorded during the report period.

Cust. Category	**Paste Special**	Customer Categories setting, Sales Ledger

Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have not been contacted during the report period.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Customer Classification to show Customers with that Classification. If you enter a number of Classifications separated by commas, only those Customers featuring all the Classifications listed will be shown.

> **Sales Person**   **Paste Special**   Person register, System module
>
> Enter a Person's initials to list the Customers with a particular Salesman that have not been contacted during the report period.

Employee Time Statistics

This report is a list of employees, comparing the planned and actual hours that each one worked during the report period. Depending on the comparison method selected, the numbers of hours are calculated using Activities whose Start Date falls in the report period and Target Time records whose Start Date is most immediately prior to the report period. Please refer to the description of the Target Time register above for an example.

Calendar Activities only will be included in the comparison. Activities that have been marked as Don't Show are not included in the calculations. Similarly, Activities with Activity Types belonging to Activity Classes marked Exclude from Time Statistics are not included in the calculations.

Period	**Paste Special**	Reporting Periods setting, System module

The report period. Depending on the comparison method chosen (see below), the report will include all Activities whose Start Date falls in the period, and the Target Time record for the employee in question whose Start Date is most immediately prior to the start of the report period. Any Target Time records with a Start Date during the report period will be included as well.

Employees	**Paste Special**	Person register, System module
	Range Reporting	Alpha

Enter a Person's initials to produce a report analysing the hours worked by a single employee.

Projects	**Paste Special**	Project register, Job Costing module
	Range Reporting	Alpha

Enter a Project Number to analyse the hours worked on a particular Project. Activities with the Project Number entered on their 'Project' card will be included in the report calculations. This field will usually be used together with the Invoiceable/Actual comparison method.

Types	**Paste Special**	Activity Types setting, CRM module
	Range Reporting	Alpha

If you enter an Activity Type or range of Activity Types here, only Activities and Target Time records with those Activity Types will be used in the report.

Class	**Paste Special**	Activity Classes setting, CRM module

If you enter an Activity Class here, only Activities and Target Time records whose Activity Types belong to that Class will be used in the report.

Display Group If you enter a Display Group here, the report will analyse the hours worked by all Persons belonging to that Display Group.

Function   These options can be used to control the level of detail shown in the report.

> **Overview**   This option is a simple list, showing for each employee their initials, total numbers of actual and target hours, and a comparison between the two totals.

> **Detailed**   In addition to the information shown in the Overview, this option lists the Activities that were used to calculate the totals.

> **Per Type**   This option is halfway between the Overview and the Detailed report. It shows subtotals of actual and target hours for each Activity Type.

> **Per Class**   This is similar to the Per Type option, and shows subtotals of actual and target hours for each Activity Class.

> **Per Display Group**

>> This is similar to the Per Type option, and shows subtotals of actual and target hours for each Display Group.

Include   Use these options to specify whether Done Activities, Activities that are not Done or both are to be included in the report. At least one option must be selected, otherwise no Activities will be included in the comparison.

Comparison   Four comparison methods are available. Remember that Calendar Activities only will be included in the calculations. Those marked as Don't Show and those with Activity Types belonging to Activity Classes marked Exclude from Time Statistics will not be included in any comparison method.

> **Invoiceable/Actual**

>> This version compares the total time worked in the report period (calculated using Time Activities) with the proportion that is invoiceable (calculated using Time Activities with an Invoiceable Project specified on their 'Project' card).

Target/Actual	Actual time calculated using Time Activities is compared with target time calculated from the Target Time register.
Target/Profile	Planned time calculated using Profile Activities is compared with target time calculated from the Target Time register.
Profile/Actual	Actual time calculated using Time Activities is compared with planned time calculated using Profile Activities.
Display	The last column of the report shows how the two figures compare. This comparison is calculated as follows—
%	The comparison is a percentage.
Quantity	The comparison is a number of hours.

Item/Salesman Statistics

Please refer to the 'Sales Ledger' chapter in Volume 2 for full details of this report.

Letter List

This report is a duplicate of that produced by the 'Letter List' function on the Operations menu of the Customer Letter screen. For each Customer Letter record in the report, the letter text and a list of recipients will be shown. Both approved and unapproved Customer Letters are included.

Letter No.	Enter the Serial Number of a Customer Letter record (or a range of Serial Numbers) to show	
Person	**Paste Special**	Person register, System module
	Enter a Person's initials to list all Customer Letters signed by that Person.	
Customer	**Paste Special**	Customer register
	Enter a Customer Number to list all Customer Letters sent to that Customer. Note that only those Customer Letters with the Customer as the sole recipient will be shown.	

Personal Calendar

This report is a list of Calendar Activities and is the same as that produced by clicking the [Report] button in any Calendar view. Please refer to the section entitled 'Personal Calendar Report' earlier in this chapter for full details.

Note that an entry must be made to at least one of the two fields below the Period, otherwise the report will be empty.

Period	**Paste Special**	Reporting Periods setting, System module
	Enter a reporting period: Activities whose Start Dates fall in this period will be shown in the report. To produce a report for a particular day, simply enter the date once. Hansa will then convert it to period format by inserting a colon and repeating the date.	

Person	**Paste Special**	Person register, System module

Enter a Person's initials to list the Activities recorded, scheduled or carried out by this Person. If you list the Activities of another Person, their Private Activities will not be included.

Display Group If you enter a Display Group here, the report will list the Activities recorded, scheduled or carried out by all Persons belonging to that Display Group.

Telephone List

This report is similar to the Contact List described above in that it lists Contacts in the Contact Person register.

Customer	**Paste Special**	Customer register

Enter a Customer Number to list the Contact Persons that work for that Customer.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Customer Classification to show Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be shown.

Customer Category

        Paste Special   Customer Categories setting, Sales Ledger

        Enter a Customer Category to show Contact Persons belonging to Customers with that Category.

Job Description   **Paste Special**   Job Descriptions setting, CRM module

        Enter a Job Description to list Contact Persons with that Job Description.

Function   These options control the amount of information shown in the report.

    Overview   This option shows the name of each Contact Person, together with contact details: telephone, mobile and alt (home telephone) numbers.

Overview with Work Details

        In addition to the information shown in the Overview, this option prints the Job Description, Department and Classification of each Contact Person.

    Detailed   In addition to the information shown in the Overview with Work Details, this option also shows the full address for each Contact together with Customer Code, Title, fax number and Comment.

User Activities

This report is a list of the current user's Activities, including Activities of all Task Types. These are Activities in which the initials of the current user are included in the Persons or Cc fields. For each Activity, the report shows the Activity Number, Start Date, Activity Type, Calendar Type (Time, Profile or Don't Show) and Text.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Activity Number to open an individual Activity record.

Period   **Paste Special**   Reporting Periods setting, System module

Enter a reporting period: Activities that are not Done whose Start Dates fall in this period will be shown in the report. Using the options described at the end of this section, you can also choose to include in the report Activities whose Creation Dates, Last Changed Dates and/or End Dates fall in this period.

Customers   **Paste Special**   Customer register

                    Range Reporting   Alpha

Enter a Customer Number or a range of Numbers to list Activities recorded or scheduled for that Customer (or for the range of Customers).

Customer Class   **Paste Special**   Customer Classifications setting, CRM module

Enter a Classification Code to list Activities featuring Customers with a particular Classification. If you enter a number of Classifications separated by commas, Activities will only be listed for those Customers featuring all the Classifications that you have entered.

Customer Cat.	**Paste Special**	Customer Categories setting, Sales Ledger

Enter a Category Code to list Activities featuring Customers in a particular Category.

Project	**Paste Special**	Project register, Job Costing module

Enter a Project Number to list the Activities relating to that Project.

Exclude Calendar Type

Use these options to exclude Activities of various kinds from the report.

Exclude Starting in Period

Check this box if you want Activities whose Start Dates fall in the report period to be excluded from the report. If this box is checked, you must check at least one of the three boxes below, otherwise the report will be empty.

Include Created in Period

Check this box if you want Activities created during the report period to be included in the report.

Include Last Updated in Period

Check this box if you want Activities last updated during the report period to be included in the report.

Include Done in Period

Check this box if you want Activities whose End Dates fall in the report period to be included in the report.

If this box is checked, both Activities marked as Done and those not marked as Done will be included in the report. Otherwise only Activities that are not Done will be shown.

Who has bought/not bought

This report lists the Customers that have bought or not bought a specific Item, or Customers with Contracts containing or not containing a specific Item.

When printed to screen, this report has Hansa's Drill-down feature. Click on any Customer Number to open an individual Customer record.

Category	**Paste Special**	Customer Categories setting, Sales Ledger

Enter a Customer Category here if you would like the report to list the Customers belonging to that Category that have bought or not bought the specified Item.

Salesman	**Paste Special**	Person register, System module

Enter a Person's initials to list the Customers with a particular Salesman that have bought or not bought the specified Item.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Customer Classification here if you would like the report to list the Customers with that Classification that have bought or not bought the specified Item. If you enter a number of Classifications separated by commas, the report will only list those Customers with all the Classifications that you have entered.

Item	**Paste Special**	Item register

Specify here the Item that is to be the subject of the report: it will list the Customers that have bought or not bought this Item. The report will be empty if you do not specify an Item.

Register   Choose which version of the report is to be produced.

      Invoices   The report will search approved Invoices to produce a list of Customers that have bought or not bought the specified Item.

      Contracts   The report will search the Contract register to produce a list of Customers that have Contracts containing or not containing the specified Item.

                                If you choose the Has Not Bought option (below), Customers with no Contracts at all will not be listed.

Function   Choose whether the report is to list Customers that have bought or not bought the specified Item.

Exports

Introduction

The 'Exports' function provides for the exporting of certain information to tab-delimited text files from where it can be incorporated in word processing programs for mailmerge, in spreadsheets for further statistical analysis or in page make-up programs for incorporation in publicity material or published reports. Alternatively, it can be imported into other Hansa databases or Companies using the 'Automatic' and 'Automatic, manual file search' import functions in the System module. The function is selected using the 'Exports' item on the File menu or by clicking the [Exports] button in the Master Control panel.

On selecting the function, the window illustrated below appears. This lists the two Exports which can be produced from the CRM module. Double-click one of the items in the list: a specification window will then appear, where you can decide the contents of the exported text file. Click [Run]: the specification window will be closed and you will then be asked to name the file and to determine where it is to be saved.
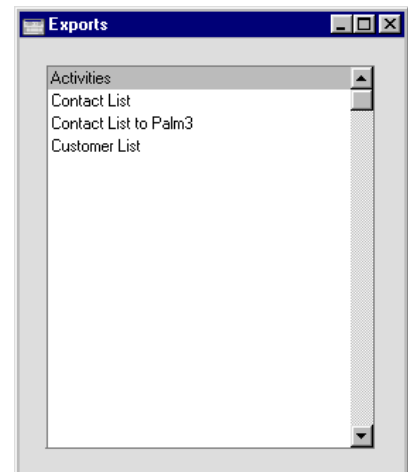
Activities

This command exports data from one or more Activities.

Period	**Paste Special**	Reporting Periods setting, System module

Enter the start and end date of the reporting period.

Customer	**Paste Special**	Customer register
	Range Reporting	Alpha

Limit the selection to Activities recorded or scheduled for a single Customer (or a range of Customers).

Person	**Paste Special**	Person register, System module

Enter a Person's initials to limit the selection to Activities recorded, scheduled or carried out by this person.

Activity Type	**Paste Special**	Activity Types setting, CRM module

Enter an Activity Type to limit the export to Activities of that Type.

Activity Row Code

Paste Special	Text Types setting, CRM module

Enter a Text Type to limit the export to Activities featuring that Type.

Press [Run] to start the export. When it has finished, close the 'Export' window using the close box.

Contact List

This function exports information from the Contact Person register.

Customers	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number to export the Contact Persons that work for that Customer.

Contact Person	**Paste Special**	Contact Person register, CRM module

Enter the name of a Contact Person to export their details only.

Customer Category

	Paste Special	Customer Categories setting, Sales Ledger

Enter a Customer Category to export Contact Persons belonging to Customers with that Category.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Classification to export Contact Persons with that Classification. If you enter a number of Classifications separated by commas, only those Contact Persons featuring all the Classifications listed will be exported.

Contact List to Palm3

This function exports information from the Contact Person register in the correct format for importing into a Palm3.

Specify Contact List to Palm3	
	Run
Customers	
Palm3 Category	

Customers	**Paste Special**	Customer register
	Range Reporting	Alpha

Enter a Customer Number to export the Contact Persons that work for that Customer. An entry must be made to this field otherwise the export file will be empty.

Palm3 Category Specify here the Category on your Palm3 into which you want the information to be imported. This is included in the export file to ensure it will be imported into the right place.

Customer List

Use this function to export information from the Customer register.

Specify Customer List	
	Run
Customer	
Customer Category	
Salesman	
Classification	

Customer	**Paste Special**	Customer register
	Range Reporting	Alpha

Choose the records to be exported by entering a Customer Number or a range of Numbers.

Customer Category

	Paste Special	Customer Categories setting, Sales Ledger

Enter a Category Code to export Customers in a particular Category.

Salesman	**Paste Special**	Person register, System module

Enter a Person's initials to export Customers with this Person as their Salesman.

Classification	**Paste Special**	Customer Classifications setting, CRM module

Enter a Classification Code to export Customers with a particular Classification. If you enter a number of Classifications separated by commas, only those Customers featuring all the Classifications that you have entered will be exported.

Hansa Financials HansaWorld

Mail

Chapter 2: Mail

Hansa's Mail facilities allow users in multi-user systems to—

- send Mail to other users, with or without attached files or Hansa records;

- send Mail to Conferences, where it can be read by all users (subject to access restrictions);

- update Mail that has been sent by other users;

- send and receive email (referred to as "External Mail" in this manual); and

- chat with other users.

Setting up the Hansa Mail System

The Server

Set up the server as described in the 'Creating a New Database - Multi-user' section in the 'Introduction and Installation' chapter in Volume 1 of these manuals.

Open the System Usage setting in the System module. Ensure the numbers of Users, Mailboxes and Conferences are correct and that the Server box on card 1 is checked. If you will be using external mail, check the External E-Mail box on card 4.

If you have been using Hansa for some time before implementing its mail facilities, any changes in this setting will result in you having to apply for a new Enabler key.

If you want users to be able to log on to the server to send and receive mail over the internet using a browser, check the Home Page, Internet Server and Multiple Internet Users boxes on card 5. Please refer to your local Hansa representative for more details about this feature.

Ensure that a folder or directory named "Attach" is in the Hansa server folder. This is used to store any files that have been attached to internal Mails.

If the server will be acting as the Gateway, a folder named "Tmp" should also be present in the Hansa server folder. This is used to store mail attachments downloaded from the POP3 server before they are transferred to the "Attach" folder and attachments that are to be uploaded to the SMTP server. Please refer to the 'External Mail' section below for details about setting up the Gateway.
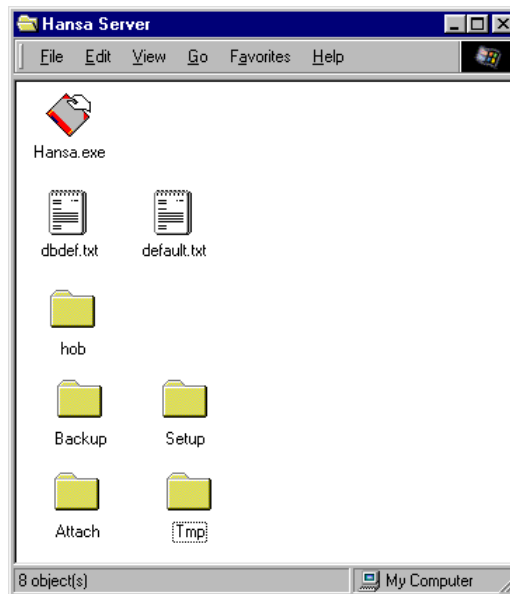
The remaining set-up work should be carried out on the server, so do not put it in to server mode yet.
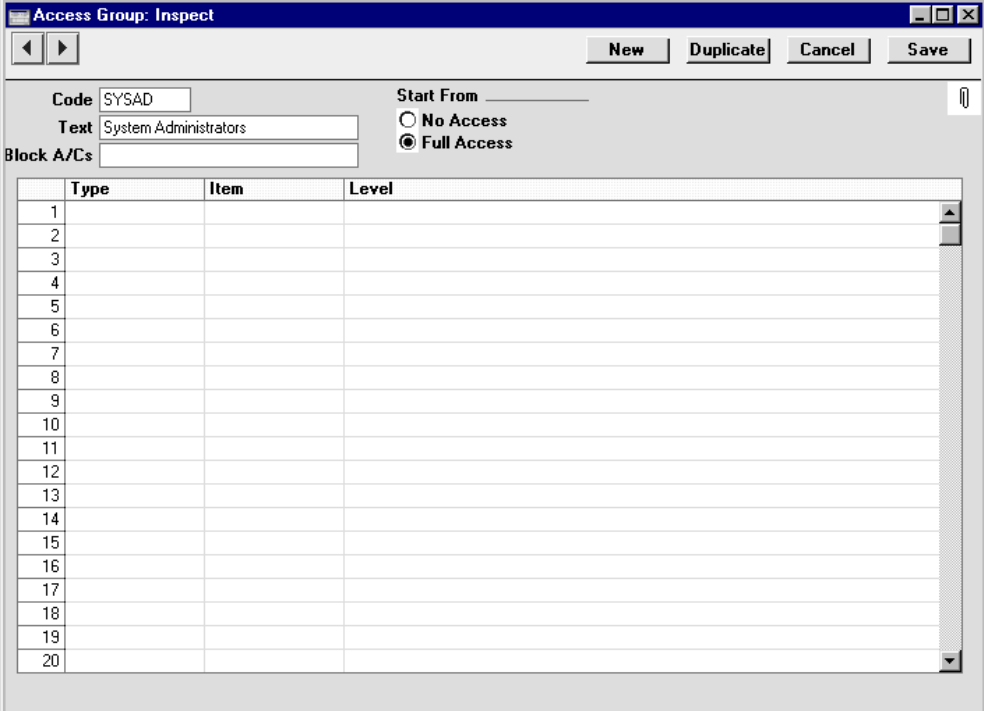
The Technics Module

Apart from the entering of records representing members of personnel to the Person register, all configuration work for the Hansa Mail system is carried out in the Technics module. You can get in to the Technics module in one of two ways—

1. Usually, the Technics module is only available on the server, when no other user is logged in. If the server is running, you must first select 'Quit, Remove Autoserver' from the File menu and restart Hansa before you can use the Modules menu.

If 'Technics' is not available on the Modules menu, the probable reason is that you have logged on as a Person that does not have access privileges for this module. If you are the system administrator, it is recommended that your Person record either does not belong to an Access Group or belongs to one that Starts from Full Access and does not exclude access to the server or Technics modules.

2. If you want to be able to use the Technics module on a client machine when other users are logged in, your Person record should belong to an Access Group that Starts from Full Access and explicitly grants full access to the Technics module—

If your Person record belongs to such an Access Group, you will be able to enter the Technics Module using the Modules menu on a client machine to carry out the configuration work described below. Any Person that is to act as a system administrator should belong to such an Access Group.

For some settings (E-Mail Aliases, E-Mail POP3 Servers and Gateways), once you have logged on as the system administrator, you should change to "Admin Client" mode. To do this, choose 'Company' from the File menu, 'Open Company Register' from the Operations menu and then 'Admin Client', again from the Operations menu. If you are not in "Admin Client" mode, any work you do in these three settings will be saved on your machine and not on the server. Once you have completed the setup work, leave "Admin Client" mode by following the same

sequence and choosing 'Normal Client' from the Operations menu as the final step.

Persons and Access Groups are both fully described in the 'System Module' chapter in Volume 1 of these manuals.

Persons

All members of personnel likely to use the mail system should be entered to the Person register, found in the System module. Full details about this register (including the assigning of passwords) can be found in the 'System Module' chapter in Volume 1 of these manuals.

For each Person likely to send external mail, specify a return Email Address on the 'Bonus' card—

Where there is more than one Company in the database, records in the Person register are specific to the Company in which they were entered. However, their Mailboxes will be open to all Companies in the database. This allows mail to be sent between Persons in different Companies. One implication of this is that all Persons across all Companies should have different Signatures

(initials). If there are two or more Persons in different Companies with the same Signature, they will not be able to have their own Mailbox.

If you are using external mail and have a separate Gateway machine, create a record in the Person register for the sole purpose of allowing the Gateway to connect to the server. So, it should have a Signature such as "GATE". This Person should belong to an Access Group that Starts from No Access and with full access to the External Gateway module only—

Access Groups are created using the Access Group register, described in the 'System Module' chapter in Volume 1 of these manuals.

Conference Access Groups

When setting up a mail system in Hansa, you are likely to define a number of Mailboxes and Conferences. Mailboxes are personal: only their owners can view their contents. They can be used both to send and to receive Mail. Conferences are more public: unless there are access restrictions, their contents can be viewed by everybody. They can only receive Mail. For full details of Mailboxes and Conferences, please refer to the next two sections in this chapter.

If you want to establish a system of access restrictions for your Conferences, use the Conference Access Groups setting in the Technics module. Select 'Technics' from the Modules menu and click the [Settings] button in the Master Control panel (or select 'Settings' from the File menu). In the resulting list, double-click 'Conference Access Groups'. This will open the 'Conference Access Groups: Browse' window which shows the Conference Access Groups that already exist—
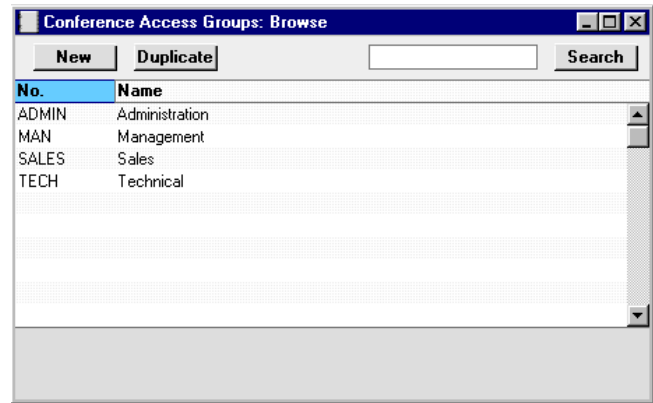
Double-click an item in the list to modify it or click [New] to create a new record. In the 'Conference Access Group: New' window, you should enter a code and a short descriptive text. The code may contain up to five characters, and you may freely mix letters and numbers. Click the [Save] button in the Button Bar to save.

Once you have defined your Conference Access Groups, they can be specified in Mailboxes and Conferences. They will be used as follows. When a Person logs in, they are automatically granted access to their Mailbox. This is the Mailbox with their initials in its User field. This Mailbox will contain a list of Conference Access Groups. Each Conference also has a list of Conference Access Groups. The Person will be able to open any Conference that shares at least one Conference Access Group with their Mailbox (and any Conference whose list of Conference Access Groups is empty). If a Person is not granted access to view the contents of a Conference, they will still be able to send Mail to it.

Do not confuse this setting in the Technics module with the Access Groups register in the System module. The latter is used to define access privileges to the various modules and functions in Hansa and is described in the 'System Module' chapter in Volume 1 of these manuals.

Mailboxes

Each Person can have their own personal Mailbox, which they will use for sending and receiving Mail. This cannot be accessed by any other user, except by the system's administrator through the Technics module.

Mailboxes can be created using the following methods—

1. Select 'Technics' from the Modules menu and click the [Settings] button in the Master Control panel (or select 'Settings' from the File menu). In the resulting list, double-click 'Mailboxes'. This will open the 'Conferences' window which shows the Mailboxes that already exist. Click the [New] button in the Button Bar.

2. In the System module, open the Person register and highlight a record in the 'Persons: Browse' window. Select 'Create Mailbox' from the Special menu.

In both cases, the 'Conference/Mailbox: New' window is opened—

Complete the fields as follows—

Name   Enter the unique name by which the Mailbox is to be identified from elsewhere in Hansa. Usually this will be the name of the Person owning the Mailbox. When Mail is sent to this Mailbox, this Name will be used as the address of the Mail. It will also be shown in the 'Paste Special' list of possible addresses. Make sure you type the name correctly because it can't be changed once the Mailbox has received Mail for the first time.

As shown in the example, it can be a good idea not to use special characters in this field. If you have a mixed network (Windows and Macintosh), special characters may not appear as expected on all machines or platforms.

Comment   Any explanatory text about the Mailbox can be recorded here. This Comment is shown in the Who Is Online report.

Class   Ensure this is set to "Mailbox" (the default).

User   **Paste Special**   Person register, System module

Enter the Signature (initials) of the Person owning this Mailbox. Access to the Mailbox is only granted to this Person (and to system administrators with access to the Technics module).

Ser Nr   This unique identifying number is generated automatically when the Mailbox is saved for the first time. It cannot be changed.

Mother   This field is not used for Mailboxes.

Max No of Mails   This field is used if you want to place a limit on the maximum number of Mails that can be stored in the Mailbox. Leave the field set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limit set in the Mail Settings setting.

If a Mailbox contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the 'Clean Up Mail Registers' Maintenance function in the Technics module should be used by the system administrator to carry out this task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail

These fields are used if you want to place a limit on the maximum number of days that Mails will remain in the Mailbox. The Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose a limit, or if you want the Mailbox to obey the global limits set in the Mail Settings setting.

The 'Clean Up Mail Registers' Maintenance function can be used by the system administrator to remove Mails whose Lifespan has expired.

Closed   Check this box if the Mailbox is no longer to be used (Mailboxes cannot be deleted if they contain Mails). Closed Mailboxes will appear in the 'Conferences' window but not in the Mailbox 'Paste Special' list. You will not be able to send Mails to closed Mailboxes. A closed Mailbox can be re-opened at any time.

Conference Access Group

> **Paste Special**   Conference Access Groups setting, Technics module
>
> Use the grid to grant access privileges to Conferences (Conferences are described in the next section). The owner of the Mailbox (the Person whose initials are shown in the User field) will be given access to any Conference that shares at least one Access Group with this list (and to Conferences whose list of Access Groups is empty).
>
> For example, the owner of the example Mailbox in the illustration above will be able to view the contents of any Conference belonging to the "Sales" or "Tech" Conference Access Groups.

User Level   These options apply to HansaWorld only, and are not visible in Hansa Financials. They are used to assign a level of access to the owner of the Mailbox. Please refer to Volume 1 of these manuals for full details.

Save the Mailbox by clicking the [Save] button in the Button Bar. You are returned to the 'Conferences' window which now shows the Mailbox that you have just created.
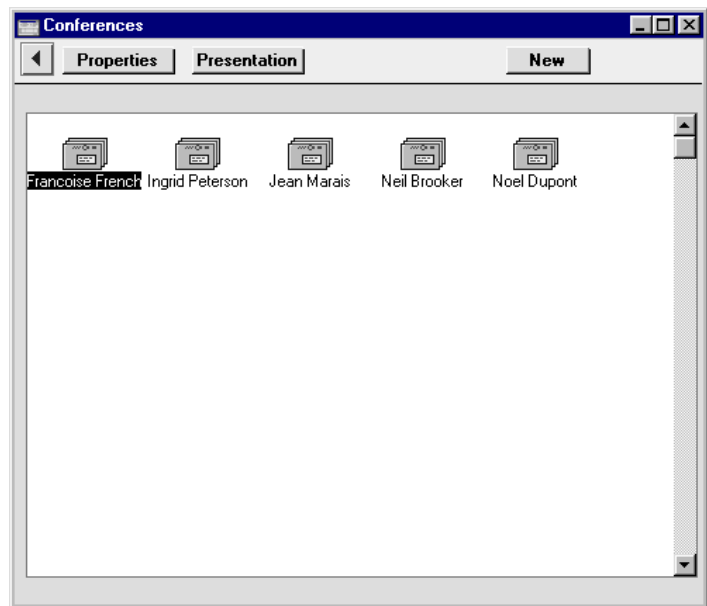
Once a Mailbox has been created, its specifications can only be modified in the Technics module. Open the 'Conferences' window as described earlier in this section and click on the Mailbox to be changed. Then, click [Properties] in the top left-hand corner of the window. Make the changes as necessary and save in the usual way, or, to delete the Mailbox, select 'Delete' from the Record menu. Mailboxes can only be deleted if they don't contain any Mail. The contents of a Mailbox can be seen by double-clicking a Mailbox in the 'Conferences' window. A Mailbox can be emptied using the 'Clean Up Mail Registers' Maintenance function in the Technics module.

Conferences

Conferences are effectively public Mailboxes: unless there are access restrictions, their contents can be viewed by everybody. Unlike Mailboxes, they can only receive Mail. It is possible to set up a hierarchical system of Conferences within Conferences similar to the nested structure of folders and directories on your hard disk.

Before attempting to create Conferences, you must create at least one Mailbox as defined above and then quit Hansa and restart. Then, click the [Conferences] button in the Master Control panel, and then click [New] in the Button Bar. You do not have to be in the Technics module to do this, but you must have been granted access to the Technics module otherwise the [New] button will be disabled.

The 'Conferences' window opens, displaying the Conferences that already exist. To create a new Conference, click the [New] button in the Button Bar. The 'Conference/Mailbox: New' window opens. This is the same window that was used to create Mailboxes in the previous section. Except as described below the illustration, the fields are used in the same way as for Mailboxes.

Name

Enter the unique name by which the Conference is to be identified from elsewhere in Hansa. When Mail is sent to this Conference, this Name will be used as the address of the Mail. It will also be shown in the 'Paste Special' list of possible addresses. Make sure you type the name correctly because it can't be changed once the Conference has received Mail for the first time.

Class   **Paste Special**   Choices of possible entries

This field should contain one of the following entries—

Conference, News, Billboard, Archive, Library

Use one of these options if you want the Conference to be able to receive Mail. The only differences between the options are that they have different icons (shown in the illustration below) and different global attributes can be set in the Mail Settings setting (Maximum Number of Mails and Lifespan).

Folder   Use this option if you want to establish a nested or hierarchical structure. A Folder can contain

Conferences or more Folders. You cannot send Mail to a Folder.

Mailbox	This option should not be used here.

User   This field should be left blank: it is only used for Mailboxes.

Mother   If the Conference is to be contained inside a Folder (known as the "Mother" Folder), the Serial Number of the Mother Folder should be entered here. This is used to ensure the Conference appears in the correct place in the nested or hierarchical structure.

Before creating the Conference, double-click the Mother Folder in the 'Conferences' window to open it. When you then create the Conference, the Serial Number of the Mother Folder will appear here automatically.

Conference Access Group

Paste Special	Conference Access Groups setting, Technics module

Use the grid to list the Access Groups that are to be allowed access to the Conference. When a user attempts to open the Conference, Hansa will compare the Access Groups listed in their Mailbox with those listed for the Conference. If there is at least one Access Group common to both, the Conference will be opened. If everybody is to have access to the Conference, leave the list empty.

For example, the Conference in the illustration above could be opened by any user whose Mailbox features "Sales" Mail Access Group in its list.

The Access Group grid can be used as described above for Folders as well as for the Conferences they contain. If this is done, all the Access Groups listed for a particular Conference should also be listed for its Mother Folder. Otherwise, a user might be given access to a Conference but will not be able to open the Folder to get to it.

User Level These options are used in Mailboxes and in HansaWorld only. They are not visible in Hansa Financials.

Save the Conference by clicking the [Save] button in the Button Bar. You are returned to the 'Conferences' window which now shows the Conference that you have just created.
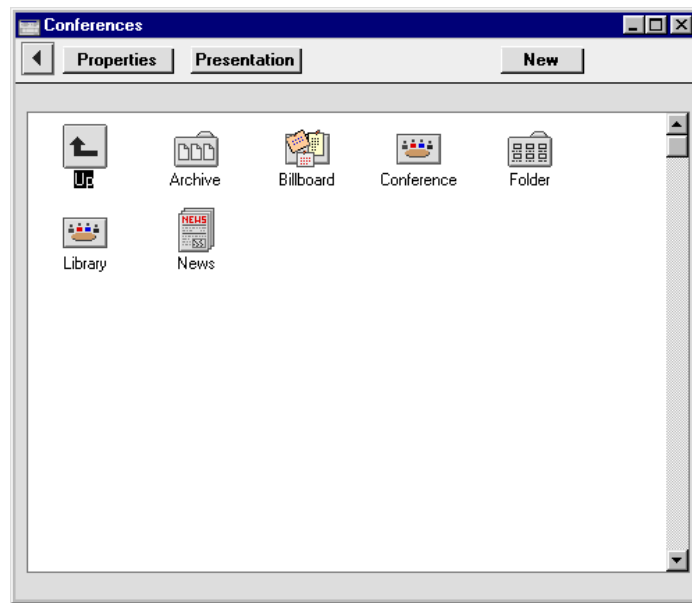
If the Conference has a Mother Number, you will have to open the Mother folder by double-clicking to see it. To get back to the top level, double-click the [Up] button that appears in the top left-hand corner.

Once a Conference has been created, its specifications can only be modified by Persons with access to the Technics module. Open the 'Conferences' window as described earlier in this section and click on the Conference to be changed. Then, click [Properties] in the top left-hand corner of the window. Make the changes as necessary and save in the usual way, or, to delete the Conference, select 'Delete' from the Record menu. Conferences can only be deleted if they don't contain any Mail. Folders can only be deleted if they are empty. The contents of a Conference can be seen by double-clicking it in the 'Conferences' window. A Conference can be emptied using the 'Clean Up Mail Registers' Maintenance function in the Technics module.

Miscellaneous Settings

Finally on the main server, a few miscellaneous settings should be considered. These are to be found in the Mail Settings setting in the Technics module.

Max Number of Mails, Max Mail

These fields are used if you want to place limits on the maximum number of Mails that can be stored in Mailboxes and in Conferences of different Classes. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

If a Mailbox or Conference contains more than the specified maximum number of Mails, the older Mails are not removed automatically. Instead, the 'Clean Up Mail Registers' Maintenance function in the Technics module should be used by the system administrator to carry out this task. This function deletes Mails (starting with the oldest) until the maximum is reached. In this case, Mails can be deleted even if their Lifespan (below) has not expired.

Lifespan of Read Mail, Lifespan of Unread Mail, Lifespan

These fields are used if you want to place limits on the maximum number of days that Mails will remain in Mailboxes and in Conferences of different types. The Lifespan of a Mail is calculated using the date it was last modified, not the date it was created. Leave the fields set to zero if you don't want to impose limits. These limits can be overridden for specific Mailboxes and Conferences.

The 'Clean Up Mail Registers' Maintenance function can be used by the system administrator to remove Mails whose Lifespan has expired.

Postmaster   **Paste Special**   Mailboxes and Conferences

Specify here the Mailbox or Conference that is to receive incoming external mail (email) that has been incorrectly addressed. This may be because of a typing error (including the use of special characters, which should not appear in email addresses), or because the recipient no longer works for your company. Such mail should be sent to a Postmaster for redirecting. Specify here the Mailbox or Conference that is to act as the Postmaster.

Usually, incoming mail with an incorrect address will only be received if the POP3 account is a multiple recipient account. If so, the Gateway will receive all mail with the correct domain name (i.e. the part of the address after @ must be correct) and will try to find the correct Mailbox or Conference for it. If it fails, it will be sent to the Postmaster. If the POP3 account is a single recipient account, the service provider will return incorrectly addressed mail to the sender as not delivered. Therefore it will not be received by the Gateway and so there will be no need to specify a Postmaster.

Admin   **Paste Special**   Mailboxes and Conferences

If the name of a Mailbox is specified here, its owner will be treated as the system administrator, the only Person that will be able to delete Mails from Conferences. This Person must be given access to the Technics module, as described in point 2 of the section entitled 'The Technics Module' towards the beginning of this chapter.

Lock all Received E-mails

Check this box if you would like all incoming external mail (email) to be locked. This will mean that you will have to create a new Mail in order to reply, and that the original text of the email will be retained. In other words, Hansa will treat incoming email in a similar manner to traditional mailing programs.

Lock and Send E-mails Automatically

(Check this box if you would like all outgoing external mail (email) to be sent and locked automatically when it is marked as Sent and saved. This is Mail in which at least one recipient is an email address containing the @ character. This will mean you should not include the email address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally. It will also mean than you will retain a record of the text that was sent to the recipient.

External Mail

The sending and receiving of external mail (email) is handled by Hansa's Gateway. This sends external mail to your SMTP server when necessary and periodically checks your POP3 accounts for incoming mail. It also distributes this incoming mail to the appropriate Mailboxes and/or Conferences.

Depending on your circumstances, a single copy of Hansa can act as the server and as the Gateway (an "Internal" Gateway). Alternatively, you might prefer to have the Gateway on a separate computer (an "External" Gateway).

In brief, some of the advantages of the Internal Gateway are—

• Easier to maintain and back up (all Gateway settings are on the main server);

• Faster sending and receiving of mail between your Hansa Mailbox and external email addresses;

Some disadvantages are—

• Cannot be used if the main server is a Windows machine;

• Reporting speed will be slower in large installations where there is both heavy use of the Gateway and frequent production of large reports (e.g. the Sales and Nominal Ledger reports).

The Gateway machine should be connected to the internet (e.g. by modem or by permanent connection) and, if it is a separate machine, it should be connected to the server.

Follow the sections below to configure the Gateway, to allow Hansa to send and receive external mail, as follows—

Internal Gateway If you will be using an Internal Gateway, the work should be carried out on the server/gateway machine. Make sure that a folder named "Tmp" is present in the folder containing the Hansa application, and that the External E-Mail option in the System Usage setting (card 4) in the System module is checked. This will allow you to send and receive mail. The Use External Gateway option in the Optional Features setting in the System module should not be checked. If this option is checked, the server will not send or receive external mail because it will assume the Gateway is present on another machine.

You can carry out the work described below on the server/gateway machine itself, or you can log on from a client machine as a system administrator, ensuring you are in "Admin Client" mode. Please refer to the section earlier in this chapter entitled 'The Technics Module' for details of these two options. You should also ensure you are in the Technics module by selecting 'Technics' from the Modules menu.

External Gateway If you will be using an External Gateway, first, on the server machine, make sure that the Person register contains a record (perhaps with a Signature such as "GATE"), as described in the 'Persons' section above, and that the External E-Mail option in the System Usage setting in the System module (card 4) is checked. The Use External Gateway option in the Optional Features setting in the System module should be checked as well. Then, select 'Server' from the Modules menu. The server will go into server mode and the 'Server Status' window will appear. Then, install Hansa on the Gateway machine. Make sure that a folder named "Tmp" is present in the folder containing the Hansa application. The External Gateway uses this to store mail attachments downloaded from the POP3 server before they are transferred to the "Attach" folder and attachments that are to be uploaded to the SMTP server.
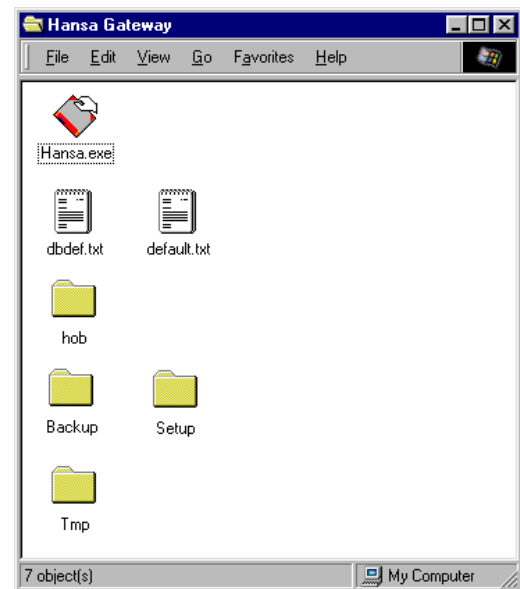
Double-click the Hansa application and create a new database as described in the 'Logging on from a Client' section in the first chapter of this manual. The purpose of this database is to allow the Gateway to connect to the server, so create a single Company with the IP address of the server and Port Number that is the same as the Server Port in the Program Mode register on the server. Log in using the ID created for this purpose (e.g. "GATE"), as described in the 'Persons' section earlier in this chapter.

On starting Hansa, you will be in the External Gateway module and the 'Server Status' window will be visible. Press Ctrl-M or ⌘-M to open the Master Control panel.

Incoming External Mail (POP3)

Email is received by logging in to a POP3 (Post Office Protocol, version 3) account and downloading unread mail to your computer. If you use Hansa to read your incoming email, it will periodically and automatically log in to your POP3 account(s), download any unread mail and divert it to the appropriate Mailbox or Conference.

- In an External Gateway, this behaviour is controlled through the E-Mail POP3 Server and the E-Mail Alias registers in the External Gateway module.

- In an Internal Gateway, E-Mail POP3 Servers and E-Mail Aliases are settings in the Technics module. If you have logged on to the server/gateway from a client, ensure you are in "Admin Client" mode before working in these settings. If you are not in "Admin Client" mode, the work will be saved on your client machine and not on the server.

Receiving Incoming External Mail (the E-Mail POP3 Server register)

The E-Mail POP3 Server register should contain details (including address and password) of each of your POP3 accounts. Periodically, Hansa will go through the records in this register one by one and log in to each account represented by those records. It will then receive any unread mail and distribute it to the appropriate Mailbox(es) or Conference(s) as specified in the E-Mail Alias register.

- If you are using single recipient POP3 accounts, you will have a separate POP3 account (i.e. a separate email address) for each member of staff or department. So, the E-Mail POP3 Server register will contain many records (one for each member of staff or department that has its own email address). As a further guide, make a note of all the email addresses that you entered as return addresses in the Person register (see the 'Persons' section above). Each one of these should have an equivalent record in the E-mail POP3 Server register.

- If you are using multiple recipient POP3 accounts, you may only have one POP3 account. In this case, the E-Mail POP3 Server register will only contain one record. Logging in to this one account will allow you to receive all mail sent to everybody in your company.

To create a POP3 Server record, open the E-Mail POP3 Server register in the External Gateway module (External Gateway) or the E-Mail POP3 Servers setting in the Technics module (Internal Gateway). The 'POP3 Servers: Browse' window will be opened, listing any records that have already been entered. Click the [New] button in the Button Bar to create a new record, or

click on an existing one that is similar and click the [Duplicate] button. The 'POP3 Server: New' window opens—

Complete the window as follows—

Code	Enter a unique identifying code for each POP3 Server record. Up to twenty characters can be used, and you may freely mix letters and numbers.
A-Pop	Check this box if you usually log in to this account using A-Pop encryption.
Closed	Check this box if the POP3 Server record is no longer used. This will stop the External Gateway checking the account for incoming mail.
IP Address	If it is not already known, the IP Address of the POP3 account can be obtained by pinging the domain name (i.e. the part of the address after the @). Alternatively, enter the domain name itself.
Port	Usually this will be 110. You may need to confirm this with your service provider.
User	Enter the user's name, as defined in their email address. In our example in the illustration, Françoise French's POP3 account name (or email address) is FrancoiseFrench@RadioImportExport.com. Therefore, "FrancoiseFrench" (i.e. the part of the address before the @) has been entered in the User field. Note that special characters cannot be used in email addresses, so the ç in Françoise has been changed to c.
	In the case of a multiple POP3 account, this field can be left blank.
Password	Enter the password for this email address.

Comment   Use this field to record any notes about the POP3 account.

All this information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

Complete the POP3 Server record as appropriate, then save it using the [Save] button and close the window by clicking the close box. Repeat the process as many times as necessary by creating new records or copying existing ones. When the process is complete, close the browse window using the close box again.

Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)

The E-Mail Alias register connects incoming email with Hansa's Mailboxes and Conferences. Hansa receives email by going through the records in the E-Mail POP3 Server register one by one and logging in to each account represented by those records. When mail is received from a particular account, Hansa will then search for the Alias records that belong to that account. The mail is then distributed to the Mailbox(es) or Conference(s) specified in those Alias records. The recipient will then be able to read that email in the same way as they would internal mail that they have received from another member of staff.

- In the case of single recipient POP3 accounts, incoming email is addressed to a particular Person, so only a single E-Mail Alias is required to route that mail to the appropriate Mailbox. So, for each POP3 Server record, you should enter a single record in the E-Mail Alias register.

- In the case of multiple recipient POP3 accounts, incoming email can be addressed to any Person in the company, so it can be difficult to route that mail to the correct Mailbox. You may need four or five Alias records for each Mailbox and Conference. You should also name a Mailbox that is to act as Postmaster. This will receive any mail for which a home cannot be found. Do this in the Mail Settings setting in the Technics module.

To create an E-Mail Alias record, open the E-Mail Alias register in the External Gateway module (External Gateway) or the E-Mail Aliases setting in the Technics module (Internal Gateway). When the 'E-Mail Aliases: Browse' window opens, click the [New] button to create a new record.

POP3 Server	**Paste Special**	E-Mail POP3 Server register, External Gateway module/Technics module setting

Enter the Code of a POP3 Server record here.

When email is received from this POP3 account, Hansa will search for all Aliases with this Code and forward the email to the Mailbox specified in the field below.

If the POP3 account is a single recipient account, only one Alias record should be entered, allowing email to be forwarded to the correct Mailbox.

If the POP3 account is a multiple recipient account, there should be at least one Alias record for each possible recipient. The Field and Match will be used to establish which is the correct Mailbox for a particular email.

Mailbox	**Paste Special**	Mailboxes and Conferences

Email received from the POP3 account specified above will be forwarded to the Mailbox or Conference entered here.

Field, Match, Priority

The use of these fields will vary depending on whether the POP3 account specified above is a single- or multiple-recipient account

Multiple-Recipient POP3 Account

If the POP3 account specified above is a multiple recipient account, it can be difficult to establish who is the intended recipient, so there will be

many Alias records relating to a particular POP3 account. These fields will be used to establish which Mailbox(es) should receive a particular email.

In this situation, it is perhaps easiest to describe these fields using an example. You have two Mailboxes in the name of "Francoise French" and "Neil Brooker". First, you should anticipate receiving email addressed to various spellings of these names ("FFrench", "Francoise", "Francoise French", "FrancoiseFrench", etc). Such email is clearly intended for the "Francoise French" Mailbox. For this email, enter separate Alias records as follows—

Field	Match	Mailbox
Recip or Recvd or To	Francoise French	Francoise French
Recip or Recvd or To	FFrench	Francoise French
Recip or Recvd or To	Francoise	Francoise French

The address used by the sender (the part of the address before @) is entered in the Match field, and "Recip or Recvd or To" should be entered as the Field by using 'Paste Special' and selecting the final option. For example, email addressed to "FFrench@RadioImportExport.com" will be forwarded to the "Francoise French" Mailbox by the Alias record with "FFrench" as the Match.

Similar Aliases should then be created for the "Neil Brooker" Mailbox. Because email addressed to Francoise French and Neil Brooker is clearly intended for their Mailboxes, these Aliases can be given a high Priority, so enter a low number such as 1 in the Priority field in all these Aliases.

Second, you might want to anticipate receiving email addressed to a department such as "Sales" or "Support". If so, you can create further Alias records with "Sales" and "Support" as the matches. This email can be forwarded to a particular Mailbox, a particular Conference, or any number of Mailboxes and Conferences. For example, email addressed to

"Sales@RadioImportExport.com" is to be forwarded to both Mailboxes and to a Conference named "Prospects", so create Aliases as follows—

Field	Match	Mailbox
Recip or Recvd or To	Sales	Francoise French
Recip or Recvd or To	Sales	Neil Brooker
Recip or Recvd or To	Sales	Prospects

Providing all these Aliases have the same Priority, email addressed to "Sales" will be forwarded to both Mailboxes and the Conference.

Finally, you might want to anticipate receiving email where the recipient is not so clear. A 'Paste Special' list is available from the Field field, offering the following options: All Mails; Recipient; Sender; Subject; Body; and Recip or Recvd or To. For example, if you know that all email from a particular sender is intended for Neil Brooker, you can enter an Alias record to this effect, with "Sender" as the Field, the sender's address as the Match and "Neil Brooker" as the Mailbox. "All mails" should not be entered as the Field: this option should only be used with single recipient POP3 accounts.

You might also enter some Aliases as follows—

Field	Match	Mailbox
Body	Francoise French	Francoise French
Body	Neil Brooker	Neil Brooker

Such Aliases should be given a lower Priority (i.e. a higher number should be entered in the Priority field) than those above. They are intended to catch email with unknown addresses by finding names in the email text. So, email with an unknown address whose text contains the phrase "Neil Brooker" will be sent to his Mailbox. But, if the address is "FFrench@RadioImportExport.com", it will be sent to her Mailbox because the Alias with "FFrench" as the Match has a higher Priority. It is not absolutely necessary to enter such Aliases, as you may prefer to deal with the issue by having

such email sent to the Postmaster. The Postmaster receives all email for which no Alias exists. He or she should read the email and forward it to the correct Mailbox or Conference manually. A Mailbox should be named as the Postmaster in the Mail Settings setting in the Technics module.

Note: the "Recip or Recvd or To" option is so named because the name of the field in an email containing the address can vary depending on the email program used by the sender. "Recip or Recvd or To" provides a means of checking for fields with each of these three names from a single Alias record. This option is therefore easy to maintain: an alternative method requiring three Aliases is more difficult to maintain—

Field	Match	Mailbox
Recipient	Francoise French	Francoise French
Recipient	FFrench	Francoise French
Recipient	Francoise	Francoise French
Received	Francoise French	Francoise French
Received	FFrench	Francoise French
Received	Francoise	Francoise French
To	Francoise French	Francoise French
To	FFrench	Francoise French
To	Francoise	Francoise French

Single-Recipient POP3 Account

If the POP3 account specified above is a single recipient account, incoming email is addressed to a particular Person, so only a single E-Mail Alias record is required to route that mail to the appropriate Mailbox. This should be configured as follows—

Field	Match	Mailbox
All mails	(blank)	name of Mailbox or Conference

Set Priority on Mail

Check this box if you would like email that has been forwarded by a particular Alias to have its Priority box checked when it appears in the recipient's Mailbox.

Full Header   Emails usually contain information such as the email
                          address of the sender, the time it was sent and the servers
                          it has passed through. This is known as header
                          information and is usually visible at the end of the email
                          text. Hansa distributes email by creating new Mail
                          records and copying in the email text. If you would like
                          this header information to be copied in as part of the
                          email text, check this box.

Keep Original Address

                          If this check box is off, the address originally used by
                          the sender will not be shown in emails. Continuing the
                          example above, emails will appear in the "Francoise
                          French" Mailbox with no indication that they were
                          actually sent to "FFrench@RadioImportExport.com". If
                          this check box is on, the original email address
                          ("FFrench@RadioImportExport.com" in the example)
                          will be listed separately as one of the recipients. This can
                          be useful if you have several Aliases linked to a single
                          Mailbox or Conference.

Complete the E-Mail Alias record as appropriate, then save it using the
[Save] button and close the window by clicking the close box. Repeat the
process as many times as necessary by creating new records or copying
existing ones. When the process is complete, close the browse window using
the close box again.

The Technics module contains a report allowing you to print out a list of E-
Mail Aliases for each user. It also lists users that don't have Mailboxes, and
users that have Mailboxes but not E-Mail Aliases.

Outgoing External Mail (SMTP)

The SMTP (Simple Mail Transfer Protocol) server is used for outgoing mail. The E-Mail SMTP Server register in the External Gateway module (also available as a setting in the Technics module) allows you to define a single SMTP Server, to which the External Gateway will send all your external mail.

SMTP Address   If it is not already known, the IP Address of the SMTP server can be obtained by pinging the domain name (i.e. the part of the address after the @). Usually it will be the same as that for the POP3 server. Alternatively, enter the domain name itself.

Port   Usually this will be 25. You may need to confirm this with your service provider.

User Address   An email address can be specified for each member of staff, using the field on the 'Bonus' card of their Person record. This address will be shown as the sender (and therefore as the return address) of any email sent by that Person. If a Person does not have a separate email address (i.e. the field on the 'Bonus' card is blank), the address entered here will be used instead.

Max. File Size   Enter the size limit imposed on individual mails by your SMTP server. You will be warned if you try to send a mail that is larger than this.

All three pieces of information can be obtained from your service provider or from the preferences in your standard mail software (e.g. Netscape, Internet Explorer, Eudora, etc).

When the setting is complete, click the [Save] button in the Button Bar to save and close the window.

Encoding

All emails are encoded to protect special characters in the text. This allows the recipient to read these characters as they were written. By default, Hansa uses the ISO-8859-1 (Western European) encoding standard. If you need to use a different encoding standard, you should specify this in the Default Mail Encoding field in the Company Info setting in the System module ('Fonts' card). For example, users in Russia should enter "koi8-r" to this field. If you have a separate Gateway machine, this should be done on the Gateway and on the server. Please refer to your local Hansa representative for further information.

While in the Company Info setting, the DB Encoding field should be set to "mac" (all lower case) if the server uses a PowerPC processor (e.g. AS/400, AIX, Macintosh, zSeries). If the server is Intel-based, the field should be blank. If you have a separate Gateway machine, this should be done on the main server.

Activating the Gateway

To activate the Gateway, open the Gateway register in the External Gateway module (External Gateway) or the Gateways setting in the Technics module (Internal Gateway). The 'Gateways: Inspect' window opens—
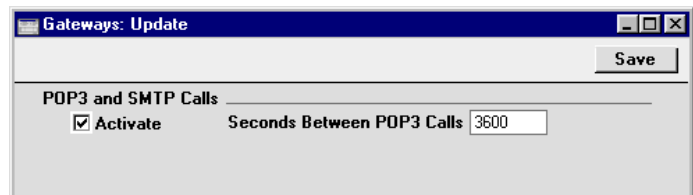
Specify in seconds how often the External Gateway is to check for incoming and outgoing mail. A typical setting will be 3600 seconds (one hour). In an Internal Gateway, it is not recommended to check for mail much more frequently than this. Checking for mail (especially incoming mail) makes heavy demands on the server and so other tasks may be completed more slowly than usual.

Finally, check the Activate box. Then, save and close the window by clicking [Save] in the Button Bar.

Backing up the Gateway

If you are using an External Gateway, information in the E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server registers is stored in the database on the Gateway machine, not on the main server. This means the Gateway must be backed up separately.

If the Gateway has not been backed up before, a second Company must be created, to be used for backing up only. Follow these steps—

1. Select 'Company' from the File menu. The 'Select Company' window appears. Select 'Open Company Register' from the Operations menu.

2. The 'Companies: Inspect' window appears. On the second row, enter a new Company. This should be a local Company, so leave the TCP/IP and Port fields blank.

3. Save the new Company by clicking the [Save] button in the Button Bar. For security reasons, Hansa quits automatically. Restart Hansa, and choose to use the new, second, Company. You might wish to enter a single record in the Person register with a password, again for security reasons.

If the Gateway has been backed up before and the second Company already exists, you must change from the Gateway Company to the second Company before backing up. Gateway information will not be included in any back-up made from the main Gateway Company. Follow these steps—

1. If the Gateway is running, quit Hansa.

2. Restart Hansa and choose to use the second Company. You cannot change Companies using the 'Company' function on the File menu because the two Companies are on different machines.

In both cases, you can now back up the Gateway machine. This is done in the usual way, by using the 'Database Text Backup' Export function in the System module. E-Mail POP3 Server, E-Mail Alias and E-Mail SMTP Server information is stored at the database level, not the Company level, so do not use the 'Company Text Backup' Export function.

External Mail in a Single-User Installation

If you have a single-user installation of Hansa, it is unlikely that you will want to use the internal mail facility. However, you may still wish to send and receive external mail (email). If so, follow these steps to configure Hansa—

1. In the System Usage setting in the System module, ensure you have access to the Server module and that the number of Mailboxes is set to one—

Checking the Server box gives you access to the Technics module, which you will use to configure Hansa to send and receive external mail. Do not grant yourself access to External E-Mail on card 4.

2. Make sure the Person register in the System module contains a single record for yourself.

3. Use the Modules menu to enter the Technics module. Following the instructions in the 'Mailboxes' section earlier in this chapter, create a single Mailbox for yourself.

4. Following the instructions in the section above entitled 'Receiving Incoming External Mail (the E-Mail POP3 Server register)', enter an E-Mail POP3 Sever record to represent your POP3 account. E-Mail POP3 Sever records can be entered using the setting in the Technics module.

5. Refer now to the section above entitled 'Connecting Incoming External Mail to Mailboxes (the E-Mail Alias register)' and follow the instructions to enter E-Mail Alias records to link your POP3 account to your Mailbox. Again, this should be done using the setting in the Technics module.

6. Move on to the section above entitled 'Outgoing External Mail (SMTP)' and follow the instructions to configure the E-Mail SMTP Server record with the address of the server to which your outgoing mail should be sent. Again, this should be done in the Technics module.

7. Finally, refer to the section above entitled 'Encoding' to configure the DB Encoding and Default Mail Encoding fields in the Company Info field in the System Usage setting in the System module.

8. You will now be able to send and receive email.

Sending and Receiving Mail

To open your Mailbox, click the [Mailbox] button in the Master Control panel. If the Master Control panel is the active (front) window, you can also press Ctrl-Shift-M (Windows and Linux) or ⌘-Shift-M (Macintosh). The following window is opened, listing all Mail that you have sent and received—

Mail is sorted in Serial Number order (i.e. in the order in which it was originally created). If a Mail is modified, it will remain in the same position in the list: to see the Mails that have been recently changed, sort the list by date (click the heading of the Date column twice to do this, so that the most recently modified Mails come to the top of the list). It is recommended that once you have sorted by date, you select 'Save Position' from the Window menu. This will mean that each time you open your Mailbox, it will remember this sort order so the most recently modified Mails will always be at the top of the list.

The Status column can contain the following symbols—

(blank)   The Mail has been sent or read.

⊠   The Mail has one that you have not yet read, or it has been changed by somebody else since you last read it.

✎   The Mail is one that you have written but not yet sent.

Double-click a Mail in the list to read or edit it, or create a new Mail by clicking the [New] button in the Button Bar. You can also use the Ctrl-N (Windows and Linux) or ⌘-N (Macintosh) keyboard shortcut. If you want to create a Mail by copying a similar one, you must open the old Mail first before you can click [Duplicate] on the Button Bar. If you want to send a Mail to a Customer, you can drag the appropriate record from the 'Customers: Browse' window in to your Mailbox browse window. A new Mail will be created, with the Customer's Email Address as the recipient. You can also use this feature from the 'Contact Persons: Browse' window.

	Date	The date the Mail was last modified. This is updated automatically by Hansa and cannot be changed. The date is taken from the server.
	Time	The time the Mail was last modified. This is updated automatically by Hansa and cannot be changed. The time is taken from the server.
	Lifespan	**Paste Special** Choices of possible entries
		This field is used to determine how long the Mail is to remain in the system. The 'Clean Up Mail Registers'

Maintenance function in the Technics module can be used regularly by the system administrator to remove old Mail. The possible entries are—

Normal The Mail will be deleted by the 'Clean Up Mail Registers' function once its Lifetime has expired. The Lifetime of a Mail is calculated from the date it was last modified and can be specified for each Mailbox or globally using the Mail Settings setting.

Never Remove The Mail will not be deleted by the 'Clean Up Mail Registers' function.

If a Maximum Number of Mails has been set for a Mailbox and it contains more than this number of Mails marked as Never Remove, the 'Clean Up Mail Registers' function will remove all other Mails (i.e. those marked as Normal and Remove Next Day) each time it is run.

Remove Next Day The Mail will be deleted by the 'Clean Up Mail Registers' function the next time it is run.

The Lifespan of a Mail can be changed at any time, unless the Mail has been Locked.

Sent Click this box to send the Mail. When the Mail is next saved, it will appear immediately in the Mailboxes of the specified recipients, with the 'envelope' icon signifying that the recipient has not read it.

If you delete a sent Mail from your Mailbox, it will remain in its recipients' Mailboxes even if it has not yet been read.

If at least one recipient is an email address (i.e. an address containing the @ character), (and the Lock and Send E-mails Automatically box in the Mail Settings setting is checked, the Mail will be sent and locked automatically when you mark it as Sent and save it. This will mean you should not include the email address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally. If the Lock and Send E-mails Automatically box is not checked, you should send the Mail to the email address by selecting 'Send E-mail' from the Operations menu once the Mail has been marked as Sent and saved.

Locked		Once a Mail has been marked as Locked and saved, it can no longer be changed, even by its author. However, it can still be deleted by both author and recipient, and will be deleted by the 'Clean Up Mail Registers' function when its Lifetime expires.
Priority		Check this box if you want to indicate to the recipient that the Mail is to be treated as high priority.
Address	**Paste Special**	Mailboxes and Conferences, Contacts and Customers

The name of the Mailbox or Conference to which the Mail is to be sent. A single Mail can be sent to up to 99 Mailboxes, Conferences and email addresses. Once a Mail has been read, it can be forwarded to other Addresses by its author or recipient, simply by adding the new Address to the end of the list.

If you know the first few characters of the recipient, enter these and press Return. Their full name will appear.

If you are sending external mail, type in the full email address(es) of the recipient(s) in this list. Alternatively, activate 'Paste Special' in the usual way by pressing Ctrl-Enter or ⌘-Enter. The 'Paste Special' list appears, listing internal Mailboxes and Conferences—
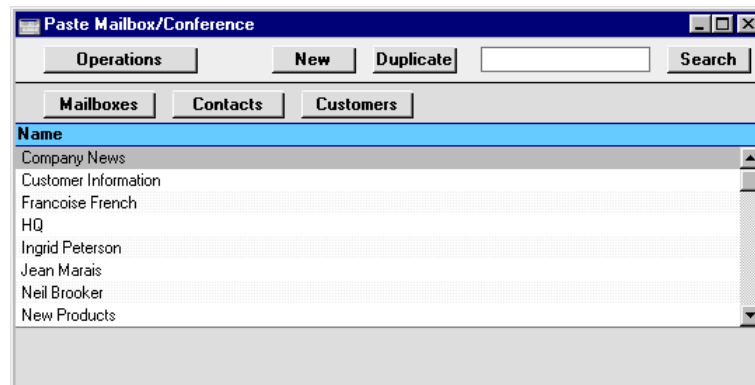
Click the [Contacts] or [Customers] buttons: the list will change to show Contacts or Customers with email addresses. Double-click a Contact or Company, and their email address will appear in the list of recipients.

If you are using the Lock and Send E-Mails Automatically option in the Mail Settings setting, you should only enter an email address when you are sure the Mail is correct. (This option will mean that a Mail containing an email address (i.e. an address containing @) will be sent and locked automatically when it is marked as Sent and saved. Therefore you should not include the email address in the list of recipients if you want to send the Mail internally for proof reading before sending it externally.

The name of your Mailbox is brought in automatically to the first line of this list, and is shown as the sender.

The column to the left of the Address can be changed to show "To:", "From:", "Cc:" or "Bcc:" as appropriate. 'Paste Special' can be used to choose one of these options. "Bcc" (blind carbon copy) is only relevant when sending external mail: each recipient of internal mail can see the full list of recipients.

Subject   The title of the Mail, or a summary of its contents, which will appear in the Mailbox browse window.

Text   The text of the Mail. There is space for about 7,500 characters. Once a Mail has been read, its Text can be changed by its author or any recipient.

If the Mail is an incoming email containing more than 7,500 characters, the message text will be appended to the Mail as an Attachment.

Sending Mail

As you write a Mail, particularly if it is a long one, you might want to save it periodically for safety, but you might not want its recipients to see it while it is unfinished. To do this, write the mail and list the recipients, but do not check the Sent box. You can close the Mail and return to it another day, and print it out for checking. It will retain the 'pencil' icon in your Mailbox, signifying that it has not yet been sent.

When you are satisfied that the Mail is finished, check the Sent box and save it. It will immediately appear in the Mailboxes of its recipients. It will no longer be marked with the 'pencil' icon in your Mailbox, but it will be

marked with the 'envelope' icon in all the recipients' Mailboxes, signifying that they have not yet read it.

Sending External Mail

If at least one recipient is an email address, they can receive the Mail in one of two ways—

1. The Mail will be sent automatically once it has been marked as Sent and saved. This will be the case if you are using the Lock and Send E-Mail Automatically option in the Mail Settings setting. The Mail will also be locked.

2. If you are not using the Lock and Send E-Mails Automatically option, select 'Send E-mail' from the Operations menu after the Mail has been saved. If changes to the Mail are not saved before this function is used, the most recently saved version of the Mail will be sent. The Mail will be sent even if the Sent box is not checked, but it is recommended that this box is checked, to remove the 'pencil' icon from the Mail in your Mailbox. The Mail will not be locked.

Once a Mail with an email address has been sent, it will be placed in an Email Queue. This Queue is processed as follows—

Multi-user   Once you have activated the External Gateway as described earlier in this chapter, it will check the Email Queue periodically. Any Mail in the Queue will be sent automatically.

Single-user   In a single-user system, email should be sent manually. To do this, bring the Master Control panel to the front and select 'Send and Receive E-Mail' from the Operations menu. Depending on how your computer has been configured, you may have to establish a connection to the internet first. All Mail in the Queue will then be sent, and any incoming mail will be downloaded from your POP3 account as well.

If you need to check the contents of the Email Queue, you can do so on the main server using the Email Queue register in the Technics module. Note that Mail is not removed from the Queue once it has been sent. The 'Delete E-Mail Queue' Maintenance function in the Technics module can be used to empty the Queue. This function will not remove Mail that has not been sent.

Attaching a Signature to External Mail

You can attach a Signature to every piece of External Mail that you send. This is a short piece of text that will appear at the end of the Mail.

To enter your Signature, bring the Master Control panel to the front and select 'Open Signature' from the Operations menu. The following window opens—
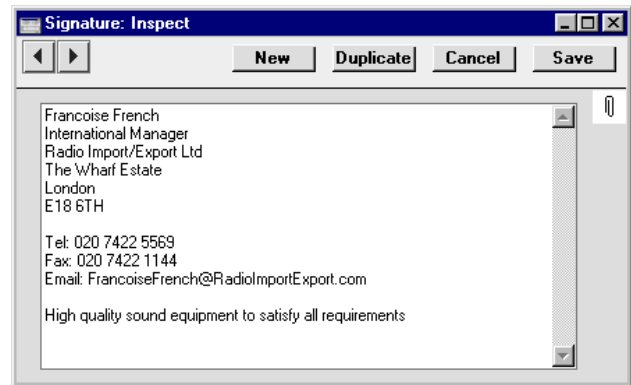
Type in your Signature and click the [Save] button in the Button Bar to save it and close the window. You can return to your Signature at any time using the same route to change it.

Every Mailbox can have its own Signature.

Mail and Conferences

Mail in Conferences can be read in much the same way as that in your Mailbox, as described above. To gain access to your Conferences, click the [Conferences] button in the Master Control panel. The 'Conferences' window opens, showing the Conferences and folders in alphabetical order.
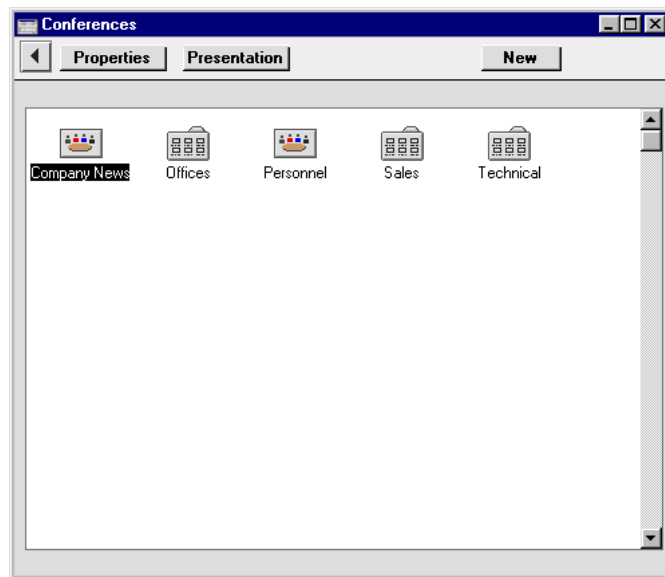
To open a Conference or folder, double-click its icon.

If a folder is opened, its contents are then shown. In this example, the "Office" folder has been opened to reveal three Conferences—
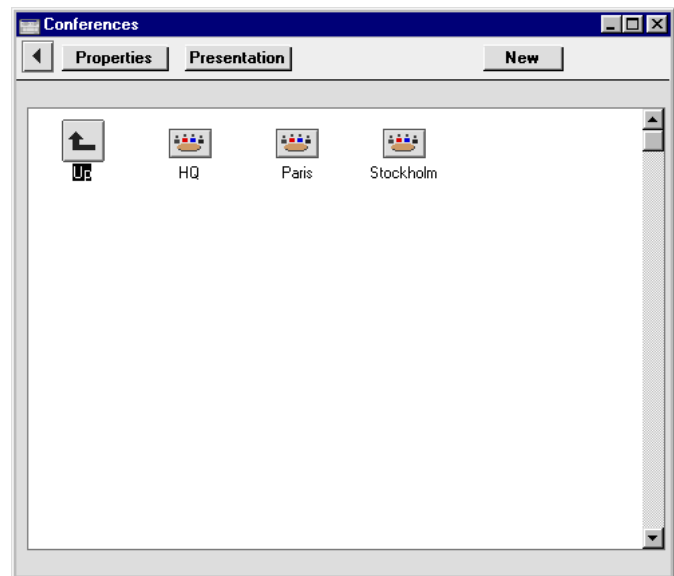
Double-click [Up] in the top left-hand corner to return to the previous level.

If a Conference is opened, a browse window opens, listing its Mails in Serial Number order. The title of the browse window shows the name of the Conference. As with your Mailbox, if you choose 'Save Position' from the Window menu after sorting by date, this will mean that the most recently modified Mails will always be at the top of the list. 'Save Position' applies to each Conference separately, so that you can save different sort orders or different window sizes for each Conference. If you do not have access rights to the Conference, it will not open when you double-click its icon.
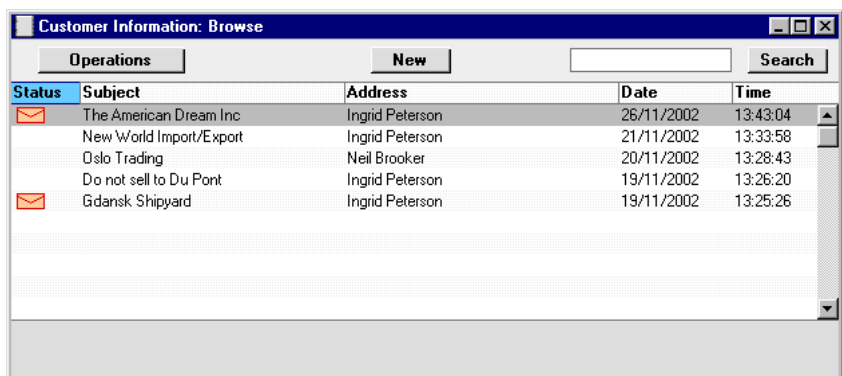
Mail that you have not yet read will be shown with the 'envelope' icon. To read a Mail, double-click it in the list. Once you have read it, you can add your comments, as described in the 'Replying to and Amending Mail' section below.

You can send a new Mail to the Conference while its browse window is open. Click the [New] button in the Button Bar: a new Mail window opens—

Note that the name of your Mailbox is shown as the sender, and the name of the Conference is the first recipient. Complete the Mail in the same manner as described earlier in this section, add more recipients if necessary, check the Sent box and save. The Mail immediately appears in the Conference's browse window, without the 'envelope' icon for you (the author) but with one for all other users.

Replying to and Amending Mail

To reply to a Mail, open it and select 'Reply','Reply to Sender' or 'Reply with Quote' from the Operations menu. A new Mail is created, in which the From and To Addresses are reversed. In the case of the 'Reply' function, the Subject is prefixed with the text "Re "—

The 'Reply to Sender' function can be used when you are replying to a Mail with many recipients, and you only want the sender to see the reply. In the reply, the original sender will become the sole recipient, and all other recipients will be removed from the list of addresses.

The 'Reply with Quote' function copies the text of the previous Mail to the new one, where it is shown with quotation marks—

```
Mail: New                                                    _ □ ✕
  Operations      🖶  🔍              New   Duplicate   Cancel    Save

  Date 28/11/2002    Time 17:17:07    Lifespan Normal          ☐ Sent      📎
                                                               ☐ Locked
                          Address                              ☐ Priority
              1  From    Francoise French            ▲
              2  To      Neil Brooker
              3
              4                                      ▼

  Subject  Re: Please call Herbert at AAOTC
     Text  >>He would like you to quote for a stereo installation    ▲




                                                                    ▼
```

In all three cases, the reply is shown in a window entitled 'New', meaning that it has not yet been saved. Complete and send the Mail in the manner described above, or, if you no longer require the Mail, click [Cancel].

The 'Reply' functions are likely to be used for replying to external mail only, because there is no need to reply to internal mail by creating new Mails. Instead, mail can be amended by any of the recipients, so there is no need to read several Mails to keep track of a discussion. This is the case for all Mails, but is especially useful if the Mail has been sent to a Conference where it can be read and discussed by many people.

Whenever an amendment is made and the Mail saved, it will appear as unread (with the 'envelope' icon) in the Mailboxes of all other recipients. If the Mail is in a Conference, it will appear as unread to all other users, so that they are aware that a change has been made since they last read it. If at least one recipient is an email address, you should select 'Send E-mail' from the Operations menu after the Mail has been saved, if you want that recipient to see the amendment. You will not be able to amend Mails where at least one recipient is an email address if you are using the Lock and Send E-Mails Automatically option in the Mail Settings setting.

When changing Mails in this manner, it is recommended that all changes be accompanied by the date of the change and the person's initials, otherwise the sense of the Mail and the order of the changes can be lost. If this happens, it can be helpful to look at the History of the Mail. Highlight it in the Mailbox browse window or open it and select 'History' from the Operations menu. This report will show who has read and amended the Mail and when.

Marking Mail as Not Read

You can mark any Mail in your Mailbox or in a Conference as unread. You might want to do this so that it retains the 'envelope' icon as a reminder to read it again or to act on it at a later date. To do this, highlight the Mail in your Mailbox or Conference browse window and select 'Mark as not read' from the Operations menu. You can also select 'Mark as not read' from the Operations menu when the Mail is open.

Attachments
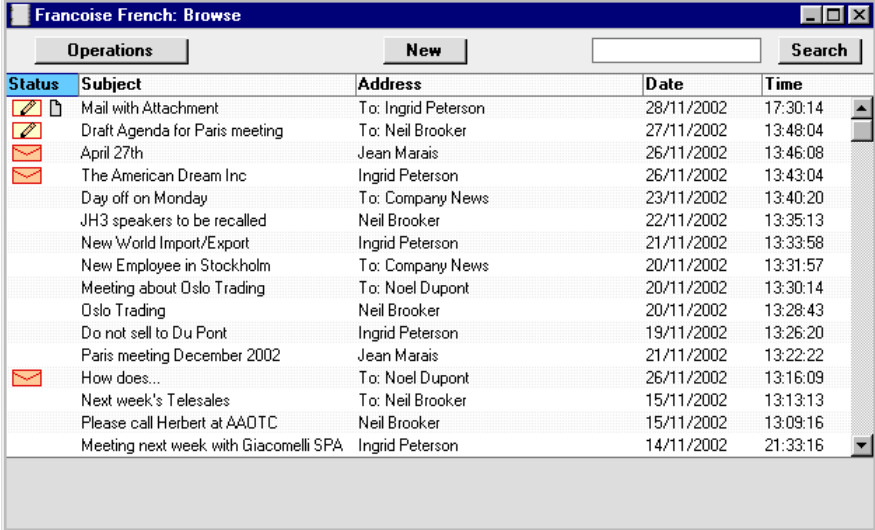
Files, notes and other Hansa records (including other Mails) can be attached to a Mail using the [Attachments] button with the paper clip icon. This can take one of two forms—

These connected objects are known as "Attachments" and this feature is universal in Hansa. Please refer to the 'Working with Records' section in the 'Work Area' chapter in Volume 1 of these manuals for full details. Remember that a folder or directory named "Attach" must be present in the Hansa server folder if you want to use Attachments, and that a folder named "Tmp" should also be present on the Gateway machine if you will be sending

or receiving external mail with Attachments. A Mail must have been saved at least once before any Attachments can be added to it.

Mails with Attachments have an extra icon in the Mailbox and Conference browse windows—

Printing Mail

To print a Mail, open it and click the Printer icon in the Button Bar or select 'Print' from the File menu.

The Form used is determined as follows—

1. Using the Form register in the System module, design the mail document and name it "MAIL". Use the 'Properties' function on the Operations menu to assign a Document Type of "Mail Form". A sample Form is supplied with Hansa: this can be modified to suit your requirements.

   To include fields, click the [Fields] button and then draw a box on the Form where the field is to appear. It can be moved or resized later if necessary. The 'Field' window opens. In the case of the field representing the Mail text itself and that representing the addressees, since they are likely to extend over more than one line, it is necessary to make an entry in the Spacing field. If this is left at 0 (the default), all the lines of text will be superimposed on one another. If the Style is 10 point Times, a Spacing of at least 10 points is recommended.

Full instructions for using the Form register can be found in the 'System Module' chapter in Volume 1 of these manuals.

2. Remaining in the System module, select 'Documents' from the File menu. The 'Documents' list window is opened: highlight 'Mail'.

3. Select 'Define Document' from the Operations menu.

4. In the subsequent window, enter "MAIL" in the Form field of the first line (you can use 'Paste Special' to ensure the spelling is correct).

5. Click [Save] to save the Mail Form definition. From now on, the mail form that you have designed will be used whenever a Mail is printed.

Saving Mail

You can save the text of a Mail as a text file. To do this, open the Mail and select 'Save Text as File' from the Operations menu. The usual 'Save File' dialogue appears, allowing you to name the file and place it on your hard disk. The Mail's Subject is used as the default file name (although any characters that might be illegal in some operating systems will be removed). If the Subject is too long, it will be truncated, and Hansa will beep. The Subject will also appear as the first line in the resulting text file.

 Saving a Mail as a text file can be useful because—

1. You want to keep a record of the Mail before it is removed by the 'Clean Up Mail Registers' Maintenance function.

2. You want to read and update the Mail at leisure off-line. In this case, open the text file in a word processor and make the necessary amendments. Then, copy the text (omitting the first line which is the Subject of the Mail) and return to the Mail in Hansa. Place the cursor in the Text field, choose 'Select All' from the Edit menu (Ctrl-A or ⌘-A) and then paste in the copied text.

Searching for Mail

You can search for Mails containing a certain word or phrase. To do this, open your Mailbox or a Conference and select 'Search' from the Operations menu. The following window opens—

Period	Paste Special	Reporting Periods setting, System module

The function will search for the specified word or phrase in Mails last changed during this period.

To/From	Paste Special	Mailboxes and Conferences

Enter a Mailbox or Conference here if you want to search for Mails with a specific sender or recipient (choose whether you are looking for a sender or recipient using the Function options below).

Text search   Enter here the word or phrase that you are looking for.

Function	Choose whether you are looking for Mails with the Mailbox or Conference entered in the To/From field above as the sender, the recipient, or both.
Search	Choose whether you want to search for the word or phrase in the Subjects of Mails, in the main texts of Mails or in both.

Press [Run] to activate the search. A report will be printed to screen, listing the Mails found. In the report, click on the Subject of a Mail to read it.

The function will only search for Mails in the Mailbox or Conference from where it was activated.

Deleting Mail

To delete a Mail, highlight it in your Mailbox browse window and select 'Delete' from the Record menu. You can also select several Mails (hold down the Shift key to select a range of Mails in the list) and delete them all at once. You cannot delete Mails from Conferences in this way.

If you delete a Mail that has been sent, it will be deleted from your Mailbox only. It will remain in its recipient Mailboxes and Conferences even if it has not yet been read. If you want to delete a Mail from all Mailboxes and Conferences, remove the check from the Sent box before deleting.

!   *You cannot undo the deletion of a Mail.*

Local Mailboxes

Local Mailboxes allow you to read and change Mail off-line (i.e. when you are not connected to the server). You can log on to the server and download the contents of your Mailbox to a local Company. You can then disconnect from the server, and read and change your Mail when convenient. At the end of the day, you can reconnect to the server and upload the Mails that you have changed (and download once again any Mails that have been created or changed during the day).

Configuring a Local Mailbox System

The Server

To configure the server for a Local Mailbox system, follow these steps—

1. If the server is running, make sure all users have logged off and select 'Quit, Remove Autoserver' from the File menu. Hansa quits.

2. If they do not already exist, create Person records and Mailboxes for each user likely to be using the Local Mailbox system. The Person register is described in the 'System Module' Chapter in Volume 1 of these manuals and Mailboxes are described in the 'Setting up the Hansa Mail System' section earlier in this chapter.

3. Quit Hansa and restart, to allow the change to take effect. Select 'Server' from the Modules menu.

The Clients

If the Local Mailbox system is in use, there should be two Companies in the databases on each client machine, as follows—

•   The "Local Company" will be used to read and edit Mail off-line.

•   The "Client Company" allows the user to log in to the server.

Follow these steps to configure each client machine to use the Local Mailbox system. These steps assume you are installing Hansa on each client machine for the first time. Please refer to the end of this section if you have been using Hansa for some time before you start using Local Mailboxes.

1. Install Hansa on the client. Ensure that the Hansa folder contains the "DBDef.txt" and "Default.txt" files but not a "Hansa.HDB" file and launch the Hansa application.

2. Hansa opens the 'Companies: Inspect' window. Enter a single Company, as follows—

This is the Company that will be used to read and edit Mail off-line (the "Local Company"). As it will not be used to connect to the server, the TCP/IP and Port fields are left blank. Click the [Save] button to save and double-click the new Company in the subsequent list.

4. When the 'Import files available' window appears, close it by clicking the close box. Do not import anything yet.

5. Select 'System Module' from the Modules menu, and click the [Settings] button in the Master Control panel. Double-click 'System Usage'.

Since this is a client, the number of Users can be set to one. The number of Mailboxes should be set to the number of different users that you anticipate will be using the machine. For example, if the machine will be used by one user in the morning and another in the afternoon, set the number of Mailboxes to two. The number of Companies should be set to two. Check any other boxes as required. Click the [Save] button to save.

6. Open the Person register by clicking the [Persons] button in the Master Control panel or by selecting 'Persons' from the Registers menu. Enter Person records for all members of staff that will be using the machine. In our example, two records will be entered, one for the morning user and one for the afternoon user. Don't forget to set passwords for all users.

   As mentioned in step 2 of the 'Server' section above, each of these members of staff should also have records in the Person register on the server (with the same initials), and should have Mailboxes on the server as well.

7. Change to the Technics module using the Modules menu, and click the [Settings] button in the Master Control panel. Double-click 'Mailboxes', and create a Mailbox for each user. In the example, two Mailboxes will be created.

8. Change back to the System module and click the [Companies] button in the Master Control panel (or select 'Companies' from the Registers menu). Enter a second Company with the IP address of the server and

Port Number that is the same as the Server Port in the Program Mode register on the server. The Code should be the same as that you entered on the server.

When you click [Save], Hansa will quit for reasons of security. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.

If you have been using Hansa for some time before you start using the Local Mailbox system, you can still configure each client as described above, with these differences—

i. The database on the client machine will already contain a single Company, the "Client Company". When you launch Hansa, this Company will be shown in the 'Select Company' window—

If the Login window appears instead of the 'Select Company' window, click [Cancel]. The 'Select Company' window will then appear.

ii. Select 'Open Company Register' from the Operations menu. The 'Companies: Inspect' window opens—

iii. Enter the Local Company on the second row as shown—

iv. Click [Save]. Hansa will quit for reasons of security. Restart Hansa and choose to enter the Local Company. Complete steps 5, 6 and 7 as described above. The client machine is now configured to use the Local Mailbox system: repeat these steps for the other clients. You should then apply for an Enabler key for each client.

v. In some installations, you might not be able to save the 'Companies: Update' window when you click the [Save] button in step iv, because the number of Companies has been exceeded. In this situation, you should quit Hansa, take the "Hansa.HDB" file out of the Hansa folder and

follow the sequence for a new client database from step 1 above. The only information that will be lost will be any custom window positions, sizes and/or sort orders that you might have saved using the 'Save Position' function on the Window menu.

Using Local Mailboxes

If you are using the Local Mailbox system, you will have two Mailboxes, as follows—

- your 'live' Mailbox. This is your normal Mailbox, used as described earlier in this chapter. It can only be used when you are logged in to the server, because it is stored there. As soon as you update a Mail in this Mailbox, it will appear as unread in its recipient's Mailbox.

- your 'local' Mailbox. This is stored in your client database, so you don't have to be logged in to the server in order to read and update its contents.

In this section, we describe the sequence that you might follow to read and edit Mail off-line in a typical Hansa installation.

1. At the start of the day, launch Hansa and choose the Client Company. This enables you to log in to the server.

2. Open your Mailbox by clicking the [Mailbox] button in the Master Control panel.

   Urgent Mail can be dealt with now. Non-urgent Mail should be transferred to your Local Mailbox. To do this, select 'Local' from the Modules menu and then 'Local Mail' from the Registers menu (or click the [Local Mailbox] button in the Master Control panel). A new window entitled 'Local Mailbox: Browse' opens. This lists the contents of your Local Mailbox. If this is the first time you have opened your Local Mailbox, the list will be empty.

3. Select 'Synchronise' from the Operations menu. The contents of your Mailbox will be transferred to your Local Mailbox. The 'pencil' and 'envelope' icons will be preserved, so that you can see which Mails need attention.

4. Log off from the server by quitting Hansa.

5. During the day, you can launch Hansa and choose the Local Company. Select 'Local' from the Modules menu and then click the [Local Mailbox] button in the Master Control panel: the 'Local Mailbox:

Browse' window opens, showing the Mail that you transferred to your Local Mailbox in step 3 above.

6. Read and update Mail in the normal way, as described in the 'Sending and Receiving Mail' section earlier in this chapter. There is one restriction on updating Mail: changes cannot be inserted into the Mail text, they must be added to the end of the text.

7. On returning to the office at the end of the day, you can once again launch Hansa and select the Client Company to log in to the server. Once again, open your Local Mailbox by selecting 'Local' from the Modules menu and then clicking the [Local Mailbox] button. Select 'Synchronise' from the Operations menu. All changed Mail will be transferred from your Local Mailbox to your 'live' Mailbox, and from your 'live' Mailbox to your Local Mailbox. If you updated a Mail in your Local Mailbox during the day at the same time as it was being changed by its recipient in your 'live' Mailbox, all changes will be preserved.

Chat

The Chat facility allows any user to have a conversation with any other user, providing they both have Mailboxes. These conversations are not saved in the database. There is no limit to the number of users that can take part in a Chat, and a single user can participate in more than one chat simultaneously. Chats are not visible to those not taking part or to the system administrator.

To start a Chat, proceed as follows—

1. Bring the Master Control panel to the front by pressing the Ctrl-M (Windows and Linux) or ⌘-M (Macintosh) keyboard shortcut. Alternatively, use the 'Master Control' function on the File menu.

2. To find out who is currently logged in to Hansa, click the [Chat] button in the Master Control panel—

    The 'Who Is Online' report appears, showing who is currently logged in together with the time of their last action and their IP address.

3. To start a Chat with someone, click on their name in the report. The Chat window opens.
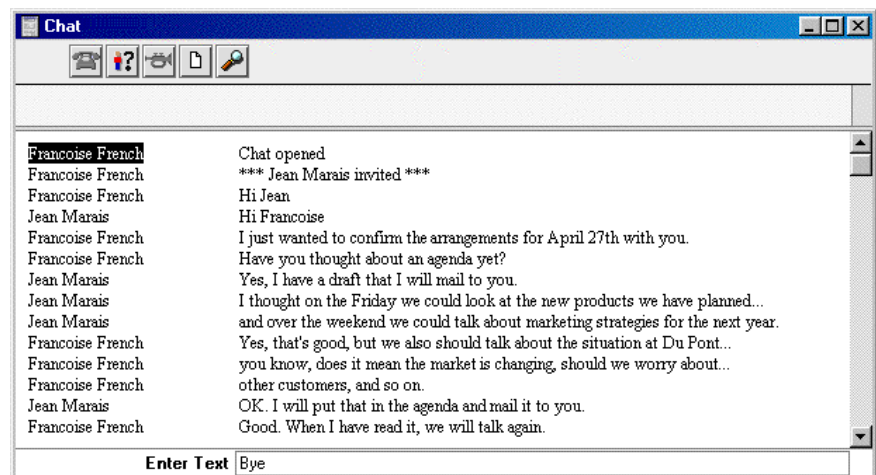
4. To participate in a Chat, simply type your message in the Enter Text field at the bottom of the screen and press Return or Enter. Your message appears in the main area of the 'Chat' window, visible to all participants.

5. To print a Chat, select 'Print' from the File menu.

6. To leave the Chat, close the 'Chat' window by clicking the close box. The other participants will be told that you have left.

Operations Menu
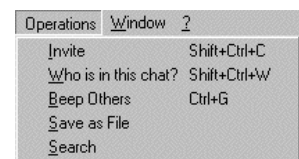
The buttons at the top of the 'Chat' window are shortcuts to the functions on the Operations menu.

Invite

This function opens a list showing everyone currently logged in to Hansa. Double-click on a name to invite a person into the Chat.

Who is in this chat?

This function produces a report showing everyone currently participating in the Chat. The report can be printed by clicking the Printer icon.

Beep Others

This function causes the computers of everyone currently participating in the Chat to beep.

Save as File

Use this function if you want to save the Chat as a text file.

Presentations

Each Hansa user with a Mailbox can enter a Presentation containing a brief profile about themselves and a picture. This profile will be visible to other users. Each Conference can also have a Presentation, which can contain details about the purpose of the Conference.

Presentations can be viewed and modified by the system administrator using the 'Presentations' setting in the Technics module.

Entering a Presentation

To enter your Presentation, bring the Master Control panel to the front and select 'Presentation' from the Operations menu. The following window opens—

Type your profile in to the right-hand field and paste a picture in the left-hand field. Click the [Save] button to save the Presentation and close the window.

You can follow the same route to change your Presentation at any time.

Reading Presentations

To read the Presentation of another user, first open a Mail with that user listed as the sender or one of the recipients, or create a new Mail and enter the user's name in the list of recipients. Ensure the cursor is in the user's name and select 'Presentation' from the Operations menu. The user's Presentation is opened. Once you have read it, close it by clicking the close box.

This method should also be used to create Presentations for Conferences.

Maintenance

Introduction

Maintenance functions tend to be used to carry out certain updating tasks, usually involving batch processing and encompassing all or many of the records in the affected register. Maintenance functions connected with Hansa's Mail facilities are located in the Technics module. Use the Modules menu to ensure you are in the Technics module and then select 'Maintenance' from the File menu. When the 'Maintenance' list appears, double-click an item in the list. A specification window will then appear, where you can decide how the function is to operate. Click [Run] to operate the function.

Clean Up Mail Registers

This function can be used to remove old Mails, to free up disk space.

Mailbox   **Paste Special**   Mailboxes and Conferences

If you would like to remove Mails from a particular Mailbox or Conference, enter its name here. Otherwise, all Mailboxes and Conferences will be affected.

Max Number of Mails

Specify here the maximum number of Mails that you would like Mailboxes and Conferences to contain. If any Mailboxes or Conferences contain more than this number of Mails, the oldest Mails will be removed until this number is reached. Mails whose Lifespan is Never

Remove will not be removed, while those whose Lifespan is Remove Next Day will be removed first.

You should only enter a number here if you want to override the maximum number specified in the Mail Settings setting in the Technics module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

Max Age of Mails Specify here the maximum age in days of Mails that you would like Mailboxes and Conferences to contain. All Mails that are older will be removed, unless their Lifetime has been set to Never Remove. The calculation is made from the date a Mail was last modified, not the date it was created. Mails that have not reached this age may be removed as well if the Maximum Number (above) has been exceeded.

You should only enter a number here if you want to override the maximum number specified in the Mail Settings setting in the Technics module or that specified when creating individual Mailboxes and Conferences, or if you have not specified a number in either of those places.

The maximum age for read Mail applies to both Mailboxes and Conferences, while that for unread Mail applies to Mailboxes only.

Press the [Run] button to start the updating process. This may take a few minutes, depending on the number of Mailboxes and Conferences, and on the number of Mails to be deleted. When the process has finished, you will be returned to the 'Maintenance' list window. This can be closed by clicking the close box.

Removing Mail Automatically

You can choose to have this function run regularly and automatically. To do this, open the Timed Operations setting in the Technics module—

Specify a time in the Operation Time field (using the 24 hour clock) and check the Mail Cleanup box. The 'Clean Up Mail Registers' function will be run automatically at that time every day, providing the server is running. If you use this facility, you must make sure a maximum number of Mails and/or a maximum age has been specified in the Mail Settings setting, if not for the individual Mailboxes and Conferences. Otherwise, no Mails will be deleted. In the illustration, it has been determined that both backing up and removing old Mail will take place automatically every day.

Emptying the Email Queue

External Mail is placed in an Email Queue, from where it will be sent to its recipient by the External Gateway. Once it has been sent, it is not removed. Instead it is marked as Sent (this can be seen in the Email Queue register in the Technics module).

If you want to empty the Email Queue register, use the 'Delete E-Mail Queue' Maintenance function in the Technics module. Do this on the main server, not on the separate Gateway machine if you have one.
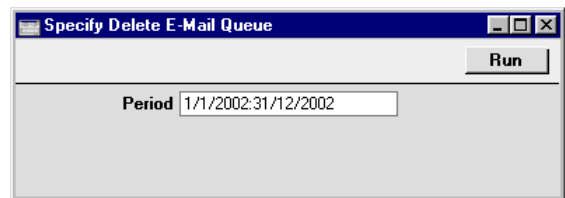
Enter the period for which you want External Mail deleted and click the [Run] button. Mail that has not been sent will not be deleted.

Emptying the "Tmp" Folder

The External Gateway uses a folder named "Tmp" to store mail attachments downloaded from the POP3 server before they are transferred to the "Attach" folder and attachments that are to be uploaded to the SMTP server.

Once an attachment has been transferred to the "Attach" folder or uploaded to the SMTP server, it is not removed from the "Tmp" folder. If space is at a premium, therefore, you should periodically empty the "Tmp" folder manually.

Restore Recently Deleted Mail

This function can be used to recover Mail that was deleted by mistake. It will not recover Mail that was deleted from all Mailboxes and Conferences.

After using the function, back up your database using the 'Database Text Backup' Export function in the System module and import the back-up file into a new database.

Reports

Introduction

Reports connected with Hansa's Mail facilities are located in the System and Technics modules. Use the Modules menu to ensure you are in one of these modules as appropriate and then select 'Reports' from the File menu or click [Reports] in the Master Control panel. Then, double-click the appropriate item in the list. A specification window will then appear, where you can decide what is to be included in the report.
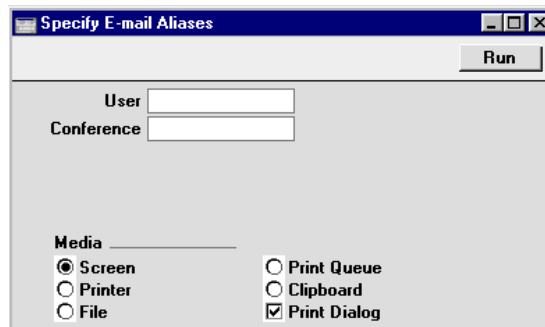
Where specified below, it is often possible to report on a selection range, such as a range of Mails. To do this, enter the lowest and highest values of the range, separated by a colon. For example, to report on Mails 001 to 010, enter "001:010" in the Serial Number field. Depending on the field, the sort used might be alpha or numeric. In the case of an alpha sort, a range of 1:2 would also include 100, 10109, etc.

Using the options at the bottom of the specification window, determine the print destination of the report (the default is to print to screen). You can initially print to screen and subsequently send the report to a printer using the Printer icon.

Once you have entered the reporting criteria and chosen a print destination, click [Run].

E-mail Aliases

This report in the Technics module lists the E-Mail Aliases for each user. It also lists users that don't have Mailboxes, and users that have Mailboxes but not E-Mail Aliases.

User **Paste Special** Person register, System module

       Range Reporting Alpha

       Enter the initials of the user (i.e. record in the Person register) for whom you wish to check E-Mail Aliases. If you enter two sets of initials separated by a colon (:), the report will list E-Mail Aliases for all users whose initials fall between those two sets alphabetically. Leave the field blank to report on all users.

Conference **Paste Special** Mailboxes and Conferences

       Range Reporting Alpha

       Enter the name of the Mailbox or Conference for which you wish to check E-Mail Aliases. If you enter two names (or two initial letters) separated by a colon (:), the report will list E-Mail Aliases for all Mailboxes and Conferences in the range. Leave the field blank to report on all Mailboxes and Conferences.

Mail Count

This report in the Technics module lists the number of Mails in each Mailbox and Conference, the number of Attachments and the total size of those Attachments.

Note that each Mail will usually be shown as belonging to at least two Mailboxes (the sender and the receiver), so the report does not give a representative figure for the number of Mails in the database as a whole.

| **Mailbox/Conf.** | **Paste Special** | Mailboxes and Conferences |

Use this field to limit the report to a single Mailbox or Conference. Leave it blank to report on all Mailboxes and Conferences.

Exclude class   Check one or more boxes to leave Mailboxes and Conferences of various types out of the report.

Sort by   These options control the order in which the Mailboxes and Conferences will be listed in the report.

    Name (ASC)   The Mailboxes and Conferences will be sorted alphabetically by name.

Mail Quant. (DESC)

> The Mailboxes and Conferences will be listed in the order of the number of Mails they contain, from highest to lowest.

Attach. Files (DESC)

> The Mailboxes and Conferences will be listed in the order of the number of Attachments they contain, from highest to lowest.

Total Size (DESC)

> The Mailboxes and Conferences will be listed in the order of the total size of Attachments they contain, from highest to lowest.

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