

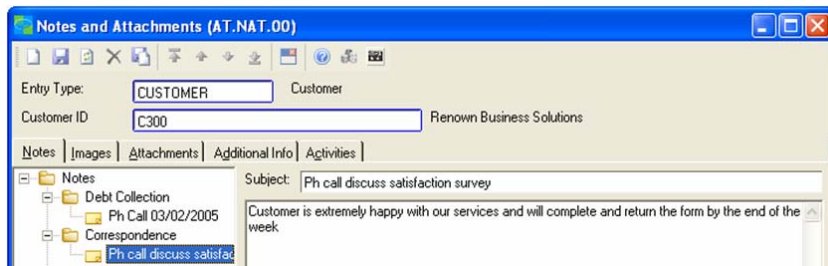


The Renown Activity and Attachment software allows users to extend the standard Dynamics - SL entities to include Notes, Images, Attachments, Additional Information fields and Activities (e-mail, appointments, tasks & events).

THE KEY FEATURES INCLUDE:

- ✚ Add additional notes, images and attachments to standard entities (Projects, Customers, Inventory, Equipment).
- ✚ Use Explorer style folder structure to file Activity, Notes, images and attachments.
- ✚ Files are stored in the SQL Database linked to the related entity (Project, Customer, etc).
- ✚ Use Additional Info fields with Code Files to standardise grouping and classification.
- ✚ Perform light CRM functions with activities (appointments, emails, tasks).
- ✚ Track Entity activity such as Timesheets, Expense Claims, etc.

NOTES, IMAGES & ATTACHMENTS



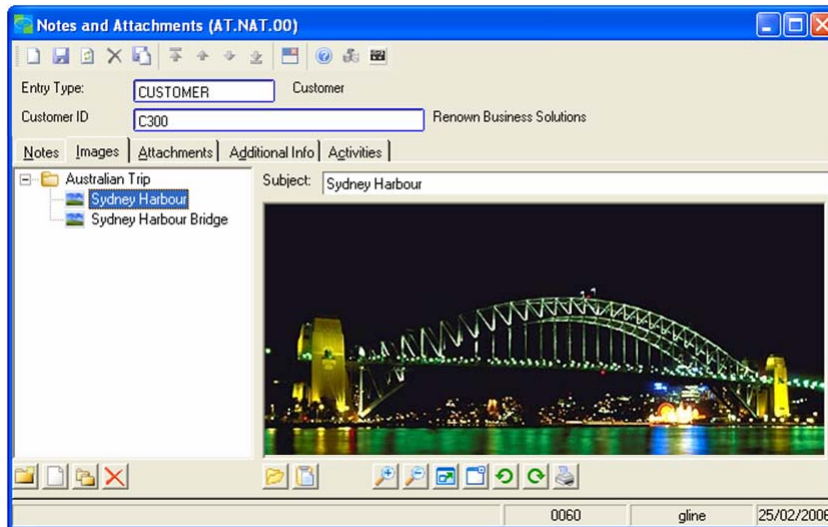
Customers Sales Contracts or Debt Collection Letters.

Projects Contracts, Work Performance Records, Compliance Forms.

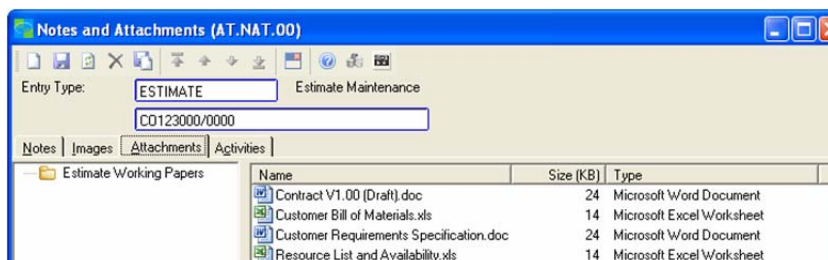
Employees Employment Contracts, Performance reports, Reviews, Warning letters, etc.

Vendors Price Lists, Parts Lists, Quotes, Correspondence.

Files and links can not be accidentally moved or damaged, as both the file and link are stored inside the SQL Database rather than a network folder.



All Notes, Attachments and Images can be stored in Explorer style folder structures for ease of filing and retrieval. All folder structures are user definable.



Define properties for all attachments to use in later reporting and searching. Using file property filters generate reports across the database to identify missing records or find a particular document, image or activity.

E.g. locate all Employees without a current Employment Contract, all Inventory Items without a current Safety Data Sheet.

ADDITIONAL INFORMATION

Extend the standard Entity records (Project, Inventory, Customer) to include extra fields for grouping or classification. It is possible to add up to 20 extra user-defined data fields for each Entity. These fields can be associated to existing Entity records (Customers, Employees, etc) or to user defined code files. Maintenance routines are provided to enable users to build their own Code Types and then create the applicable validation / look-up records.

Entry Type:	CUSTOMER	Status:	Active				
Description:	Customer	Reserved:	<input checked="" type="checkbox"/>				
Options		ID Fields					
	Visible	Code Type	Field Class	Values	Caption	Mask	Length
ID Field 1 (Char 60)	<input checked="" type="checkbox"/>		CustID		Customer ID	Upper Case ASCII	60
ID Field 2 (Char 60)	<input checked="" type="checkbox"/>		Inventory ID		Inventory ID	Upper Case ASCII	60

ACTIVITIES

The Activities tab will allow users to track all correspondence, appointments, tasks and activities related to any Dynamics® SL Entity (Customer, Project, Vendor, Contract, etc). Create E-mails, Appointments or Tasks that will automatically update both the Dynamics® SL Activities screen and Outlook.

An activity tracking engine is also provided to allow any transaction to be tracked against related Entities. For example, define options to track Timesheets to the related Project, Employee and/or Project Customer. When reviewing the Project, Employee etc, it will be possible to review the Activities folder Timesheets and see a full listing of all Timesheets for that Project or Employee. It is possible to drill down from the Activity record to the Timesheet.

Activity Tracking options will be available for a great range of functions including; Maintenance of master records, printing of Quotes or Estimates, Expense Claim Entry, Timesheet Entry and many more. The Activities tab will become a form of CRM Lite allowing companies to track all information and activity performed in relation to their Customers, Projects, Contracts, Vendors, Employees, etc. It will track correspondence and day to day business processing where management feels a particular process needs to be tracked.

PRODUCT TYPE

This product has been developed using Microsoft™ Dynamics™ SL – VB Tools, but includes VB Controls that are not part of the VB Tools standard control set. This includes the folder structure functionality and image viewing features. A client installation is required to load image viewing components. Dynamics® SL Version 5.5x, 6.0x, 6.5x.

SOFTWARE MAINTENANCE & SUPPORT

Renown will provide support for the module under the terms and conditions of the standard Renown Support Agreement. Free software upgrades are provided for new versions of Dynamics SL under the terms and conditions of the standard Renown Maintenance Agreement. Maintenance is charged at 20% of the standard module price.