AyaNova Lite 7 Help

USER MANUAL

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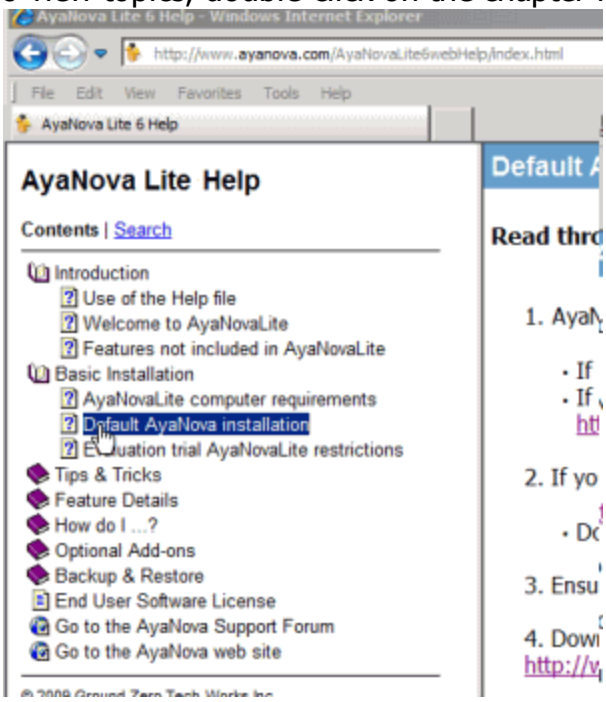
Introduction

1 Introduction

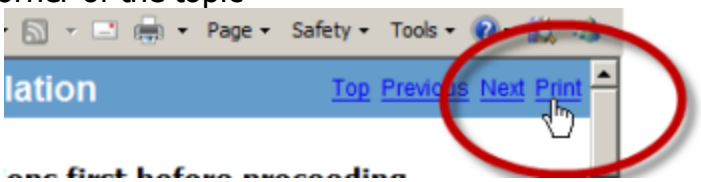
1.1 Use of the Help file

This online Help file provides detailed information on all features and use of AyaNovaLite as well as installation and configuration guides and more.

- To view topics, double-click on the chapter headings to expand



- To print a specific topic, select the Print menu option in the upper right hand corner of the topic



- To search for a specific word to bring up relevant Help topics, select Search, type in the word.

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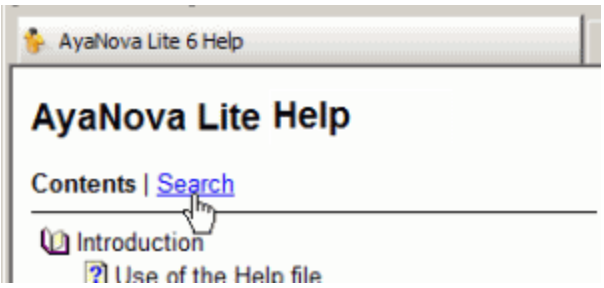

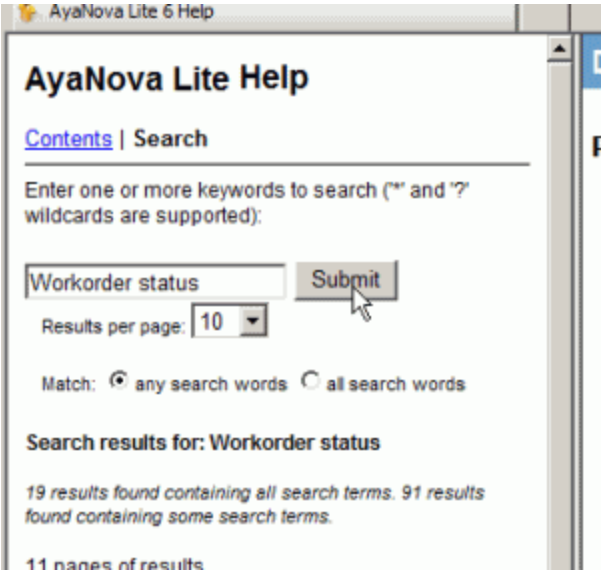

Screenshots depicted in this Help may not display exactly as your copy of AyaNovaLite does, as dependant on screen size, display settings, data and specific version in use.

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All rights reserved worldwide.

AyaNova® is either a registered trademark or trademark of Ground Zero Tech-Works Inc. in the United States and/or other countries. All other trademarks referenced are the property of their respective owner.

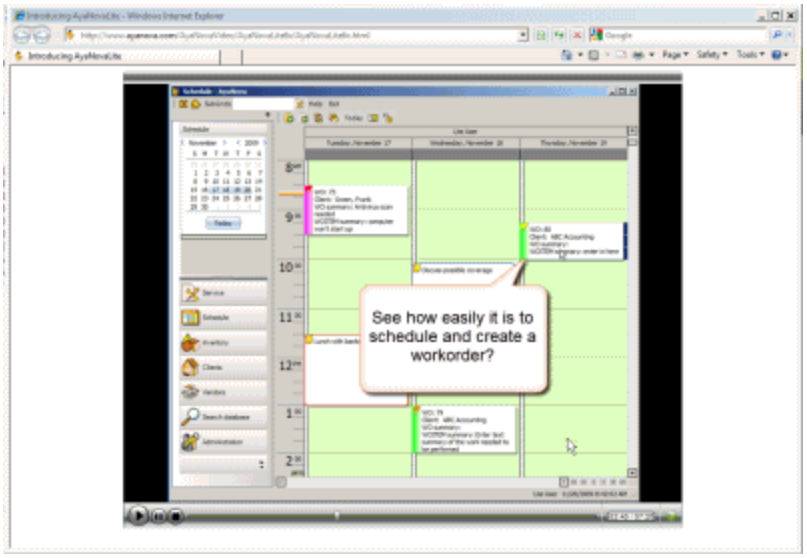
This documentation is provided as is and could include technical or other mistakes, inaccuracies or typographical errors. Where inconsistencies between the documentation and the program occur, the program is considered to be the authority.

1.2 AyaNovaLite QuickStart for Beginners

AyaNovaLite is affordable and easy-to-use scheduling and work order software for Windows for a single user stand-alone computer use only.

And AyaNovaLite is very easy to use.

- Watch a video overview of AyaNovaLite



- Follow along with the screenshots and step by step tutorial on how easy it is to **schedule a technician and create a workorder at the same time** How do I schedule user for a new workorder item via the Schedule screen?

- See how easy it is to **create a workorder** for client that you will provide service for - check out the Tips & Tricks section Creating a new workorder for a client

We encourage you to take advantage of this AyaNovaLite Help file which contains details on all of the features of AyaNova, including step by step tutorial walk through's with screenshots in the How do I...?'s, as well as tips on use in the Tips & Tricks section, as well as specific details on each feature in the Feature Details section

Although the sample data provided with the evaluation of AyaNovaLite is based loosely on what may occur in a computer service environment, AyaNovaLite is in use by many different service industries.

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1.3 Features included and not included in AyaNovaLite

Features of AyaNova Lite:

AyaNova Lite is a great, very affordable program providing the following features:

Single computer only - AyaNova Lite can only be installed on a single computer. It can not be networked.

Single user scheduling only - Only one person can be scheduled in AyaNova Lite. Use the graphical Schedule screen to quickly see at a glance when scheduled for what client.

Localization - Edit the labels in AyaNova Lite to display how YOU want them to.

Service Workorders - Enter in as much or as little details about the service needed and performed, including parts as well as labor.

Follow Ups - create reminders to yourself that display on the Schedule screen

Clients - Enter details about your clients and be able to view service history easily

Printing - Print out dispatch reports of what you need to do, print out client history, print out billable hours, print out which clients have not been invoiced, and more.

Search - Use the Search Database feature to quickly look up any previously entered information.

Report Templates - Customize all sample report templates that come with AyaNova Lite or use as is. And also create your own report templates too!

Optional add-ons and plugins - Interface with QuickBooks or Peachtree. Import and export clients and/or parts. Export your schedule to Outlook.

Additional customizations - Edit and create your own Workorder Categories, Statuses, Priorities, and more.

Features of the full AyaNova that are not included in AyaNovaLite:

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Whereas the full AyaNova program is a lot more robust, is networkable, more than one user can be scheduled, and has many many more features to make your service organization efficient and effective!

We have linked below to further details about each feature in the AyaNova 7 Help file. Also too, you can always upgrade to the full version of AyaNova at anytime to take advantage of the features listed below.

Multiple Users - AyaNovaLite is a single user version of AyaNova and can only be used for **one** schedulable user.

Log in security - As AyaNovaLite is for a single user on a single computer, there is no log in security. Security groups dictate the AyaNova features a user has access to, and what what level of access they will have.

Networking - AyaNovaLite can not be used on a network. With the full AyaNova, you can have multiple networked users view and edit data at the same time.

Remote Access - AyaNovaLite can not be used remotely. With the full AyaNova, remote users can run the full AyaNova program, and/or use the optional add-on WBI (web browser interface) and/or use the optional add-on MBI (mobile browser interface) or connect remotely through the AyaNova Data Portal connection

Signature capture - signature from your client can be captured via WBI and MBI, as well as display the signature on reports in the full AyaNova

Notification Subscriptions for Users - With the full AyaNova, users can be notified via internal AyaNova memo, internal popups, external email or pager, of events that occur such as when a workorder status changes, when a workorder is overdue, when a contract is about to expire, when a new workorder is scheduled, when a customer requests service via WBI, when a schedule marker is imminent or newly created, when banked service is depleted, when a unit is due back from an outside service or past due, when a part request has been received.

Notification Subscriptions for Clients - With the full AyaNova, clients can be notified via email when a certain service workorder event occurs such as when a client service request has been accepted or rejected; when a new workorder for that client has been created; when workorder status of a workorder has changed; when a workorder has been closed; or receive a follow up email a set number of days after the workorder has been closed.

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Regions - With the full AyaNova, you can use Regions to restrict access to data based on the region assigned to. By "data", we mean clients, service workorders, quotes, preventive maintenance, schedules, client service requests (CSR's), contracts, loan items, projects, and part inventory in regionalized part warehouses.

Custom Fields - With the full AyaNova, you can add up to 10 additional fields for entry screens of the following AyaNova objects - Client entry screen, Contract entry screen, Head Office entry screen, Part entry screen, Purchase Order entry screen, Loan Item entry screen, Unit entry screen, Unit Model entry screen,
Vendor entry screen, Workorder Item screen (displays within service workorder, quote and pm)

Units - Units would be any thing owned by a client that you may wish to schedule and track service history for that you can specifically select for in a service workorder or PM or quote.

Unit Meter Reading - The Unit Meter reading in the full AyaNova allows you to maintain a history of meter readings for a unit. A meter reading generally comes from a device or readout attached to equipment that indicates it's duty cycle such as hours or miles or counts. This can be useful if you charge based on meter readings, or be able to recommended additional products and services to the client based on its meter readings.

Loan Items - Loan Items in AyaNova are intended for tracking equipment that you might loan out or rent to clients. For example you might rent or loan equipment to a client while their equipment is being repaired. Loan Items are selected within a service workorder item so you can track along with your service.

Full Inventory - Good inventory control is essential to properly running a business. AyaNova makes inventory control easy for you to track, print out reports and always be aware of your stock levels. AyaNova includes full inventory features - purchase orders, purchase order receipts, inventory adjustments, on hand, serial numbers, part requests, part warehouses and more.

Wiki - The full AyaNova includes the knowlegebase feature that allows AyaNova users to freely create and edit documentation for an AyaNova "object" (be it globally, a purchase order, a service workorder, etc) that supports hyperlinks, can embed images, allows the user to attach documents and files that are accessible by all users, and is searchable via the Search Database feature.

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Documents - links to external (outside AyaNova) files and resources that AyaNova objects (i.e. service workorder, clients, etc) can be associated with.

Customer Service Requests - with the full AyaNova, customers can request service using the optional add-on WBI and you can accept, automatically generating a service workorder for the request; or reject; or accept to an existing service workorder.

Contracts - In your service you may have customers that receive special service rates, and travel rates, as well as a special discount on parts. Rather than having to try to remember when billing out labor, travel, and parts, you can assign these contracts to the head office or to individual clients; and the workorders where these clients are selected will automatically remind you by either allowing these special contract rates in selection lists, or restricting to only the special contract rates in selection lists, and automatically entering the discount to be set to parts when used in service.

Banked Service - If you have customers that prepay you for service, use the Banked Service feature to track what has been pre-paid and what has been applied against from service workorders for this client (or unit or head office)

Merger - This utility allows you to "merge" clients - transfer workorders, quotes, etc from one client to another.

Memos - The memo feature in AyaNova is used to communicate between users of AyaNova.

Preventive Maintenance - The primary goal of preventative maintenance is to prevent the failure of equipment before it actually occurs - in AyaNova it is a feature used to schedule recurring service automatically so you do not forget.

Quotes - Create quotes in AyaNova for work that may be performed and parts that may be used. Track creation of the quote, submission to the client of the quote and acceptance of the quote. Generate a workorder from the quote without have to re-enter everything and maintain a history of your quotes as well as the actual service performed.

Service Workorder Templates - Service workorder templates allow you to pre-enter or pre-select common information for a new service workorder entry screen. Service workorder templates are a great time saver. AyaNova also provides Preventive Maintenance Templates and Quote Templates.

Service Workorder - the Service Workorder entry screen in the full AyaNova provides many more features to help you manage your service.

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Service Workorder with multiple workorder items - The AyaNova service workorder entry screen provides the ability to enter multiple workorder items, for those workorders that include multiple service for possibly multiple units.

Unit selection - with each workorder item, you can select a specific unit "owned" by the client of that workorder that is being serviced.

Each workorder item can have multiple Scheduled users - with AyaNova, you can schedule multiple technicians for the same service.

Use Tasks to identify common tasks to follow for service maintenance, thereby saving having to type in repetitive tasks, as well as a reminder of common repetitive tasks.

Each workorder item can have multiple Labor records - with AyaNova, you can enter in multiple labor records which is useful if service spans different days, or performed by different techs.

The Labor subsection of a workorder item can be applied against banked service that the client has pre-paid for.

The Travel subsection of a workorder item is where you can identify details of travel provided such as charges, as well as apply against banked service that the client has pre-paid for.

In the Part subsection of a workorder item, you can create Part requests when a quantity of a part is not in stock, so that purchasing knows what is needed to order.

Loans subsection of a workorder item is where you would identify loan items provided with this workorder item, identify loan out date, loan return ETA data, and actual return date, and identify any loan charges – using either the Rate quantity and Rate, or manually entering in an amount in the Charges field

Expenses of a workorder item identifies additional expenses incurred for this workorder item that would not be parts or service

Outside Service of a workorder item identifies and track information regarding units sent out for repair such as RMA number, related dates, who shipped to and via, and possible charges

Additional custom fields that could be text, date, currency or true/false format fields for workorder item can be set.

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Workorder items can be moved to a different workorder or copied to a different workorder which is useful if you need to do so without having to re-enter in all of the data.

A unit can be generated from a part in a workorder - saving you entry time.

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Requirements, Installation & Trial

2 Requirements, Installation & Trial

2.1 Computer Requirements

AyaNovaLite program requirements:

- Recommended minimum is Windows 7 with up to date latest service packs applied, but is compatible with latest Windows OS as well as old as XP Pro
- Latest Microsoft .Net Framework 4.x pre-installed with all service packs applied

Perform the following to check that your computer has all recommended updates on it before installing AyaNova:

1) Go to http://support.microsoft.com
2) Under Downloads & Updates click on Microsoft Update
3) Check to see if any updates needed.
4) Apply all recommended updates including .NET Framework 4 and any other fixes or patches to .NET
5) Reboot when completed whether it says to or not
6) Run the Microsoft Update again to see if any additional recommended updates required now

AyaNovaLite minimum hardware requirements:

- 1GHz or higher Pentium-compatible CPU with 500MB RAM or higher
- The above is **minimum** hardware requirements. What this means is, your AyaNovaLite will always run faster on a faster computer (more memory, higher processor, etc).
- AyaNovaLite is hardware scalable - performance is **directly related** to the performance of the computer where the AyaNovaLite database is. Obviously a faster computer is going to be able to respond more quickly.
- If you are encountering any perceived slowness in running AyaNovaLite, it may be time to update your hardware or purchase a newer computer.

Backup Hardware

- Backing up your data properly is very important. In the event of database corruption, hardware failure, fire, theft or disaster it will enable you to get up and running again quickly.

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- Refer to the Help topic on backup and restore for stand-alone installation

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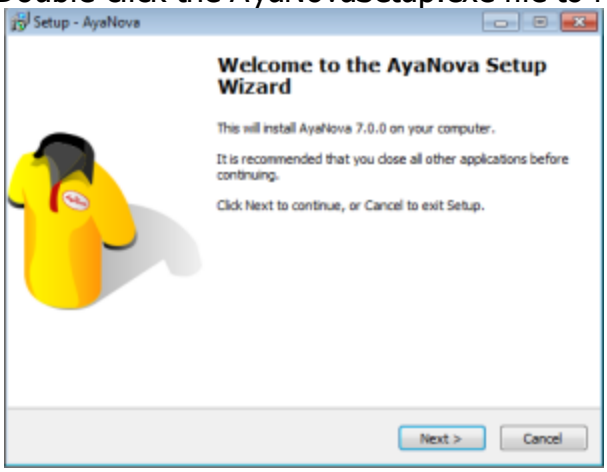
2.2 Installation

Read through all instructions first before proceeding.

1. Both AyaNova and AyaNovaLite requires **Microsoft .NET Framework 4**
   - If the .NET Framework is not found the setup program will guide you through downloading and installing it.
   - If for some reason due to your computer, the setup does not guide you through, then download via the link at https://www.ayanova.com/download.htm and install.
2. If you haven't already, log into the computer as you normally do
   - Do not perform **any** installation of AyaNova nor AyaNovaLite via remote access
3. Ensure no other programs are running during setup.

4. Download the AyaNova installation file AyaNovaSetup.exe from the AyaNova web site https://www.ayanova.com/download.htm to a temporary folder on your hard drive

5. Double-click the AyaNovaSetup.exe file to run the installation and click Next



6. Review and agree to the license agreement, and click Next

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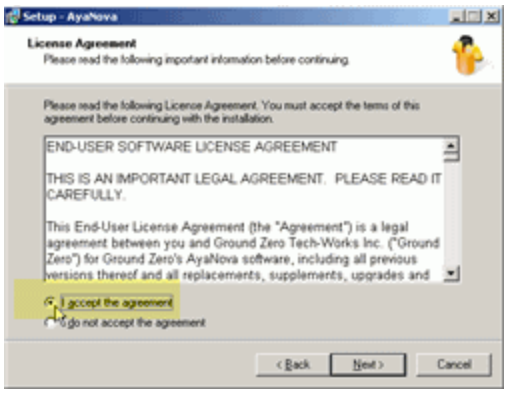
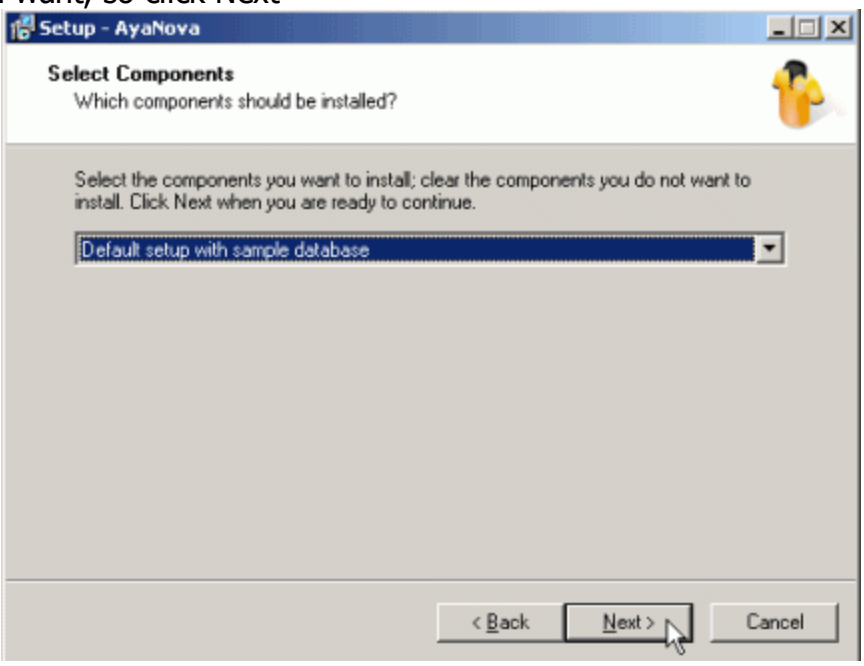
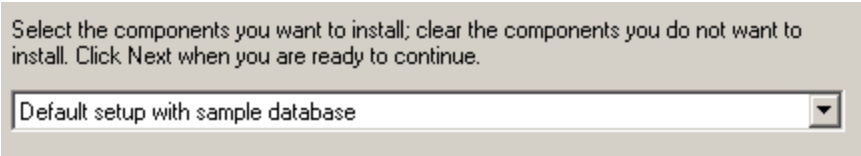


7. The default option is "**Default setup with sample database**". This is what you want, so click Next





NOTE: the network setup option is **ONLY** if you have performed the preceding steps as per the network steps for the specific AyaNova database server setup you are following and **ONLY** if you will be running the full AyaNova.

8. The installation shows additional AyaNova optional products you may be interested in trying out or using when installing the default stand-alone AyaNova.

If you are not installing any of the optional items skip to step 9.

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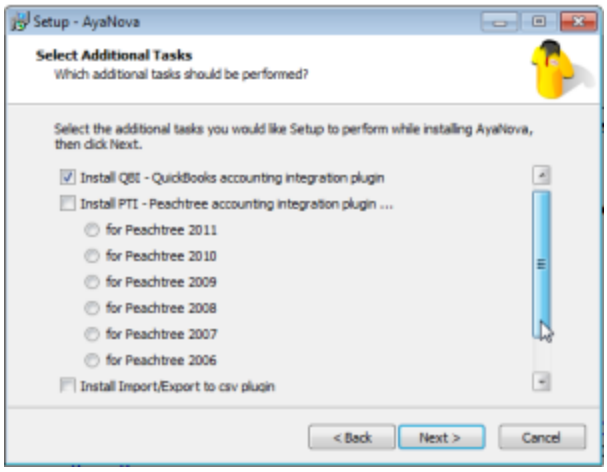
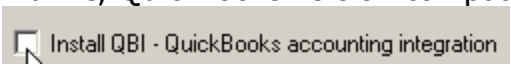
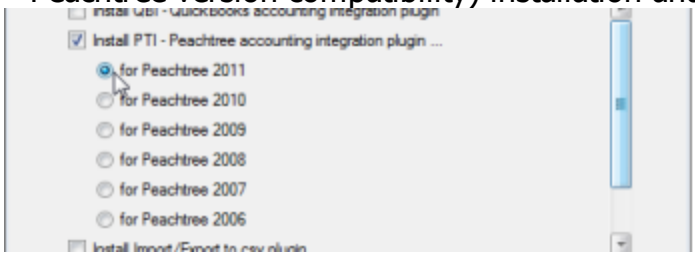


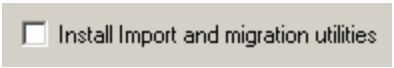
- Refer to the QBI (QuickBooks interface) Help manual for details on requirements (QBFC7.0, QuickBooks program also installed to the local hard drive, QuickBooks version compatibility etc) installation, and use.



- Refer to the PTI (Peachtree interface) Help manual for details on requirements (Peachtree program also installed to local hard drive, Peachtree version compatibility) installation and use.



- This installs client, part and unit import/export utilities. Refer to Import Utilities - Client or Parts



- Do **not** check-mark the Firebird SQL to Microsoft SQL migration utility as it would **only** be used with a full AyaNova that you will be networking.

9. The installation displays details on what it will now install. Select Next and it will install the databases and program files.

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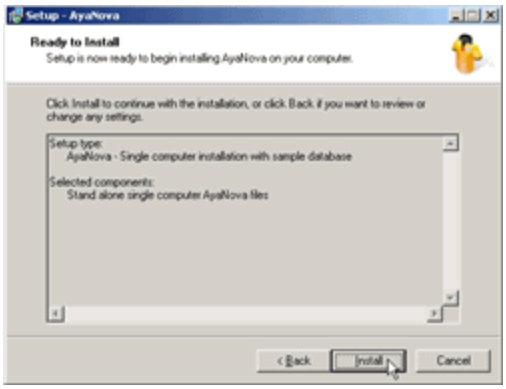
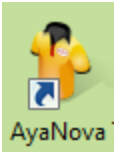


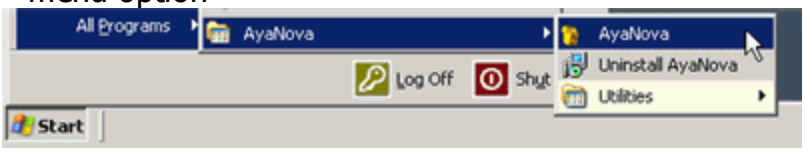
10. The installation is now complete.

11. You can now start the AyaNova program with the installed sample trial database

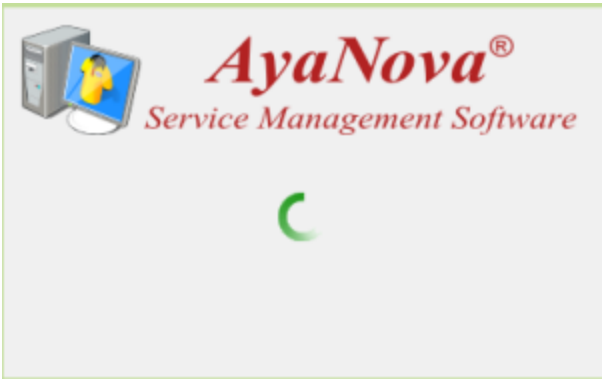
- Run AyaNova from the desktop icon



- **Or** run AyaNova from the Start -> All Programs -> AyaNova -> AyaNova menu option



12. When started, AyaNova will pre-load items it needs for faster access later.



13. The AyaNova login screen will first appear as it defaults to loading the full trial AyaNova program. Click on the OK button to load AyaNova.

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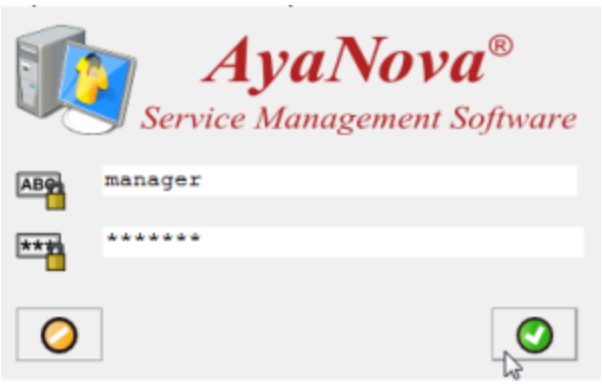
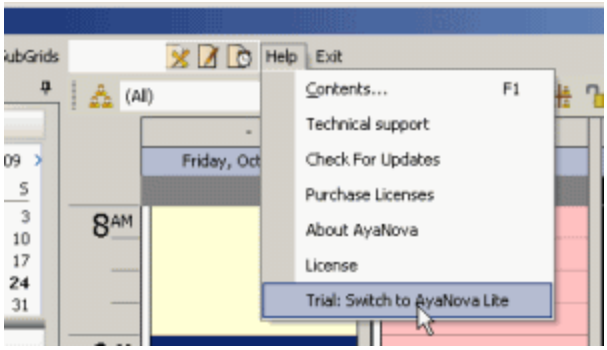


14. Toggle to running the AyaNovaLite program by selecting the menu option Help -> Trial: Switch to AyaNovaLite. When you do so, AyaNova will exit and the next time you run, it will be AyaNovaLite.



15. Now run AyaNova again - it will load with the AyaNovaLite database and showing the features of AyaNovaLite.

No login screen appears as AyaNovaLite is for one user on a single computer.

We recommend first following along with the tutorials to become familiar with AyaNova Lite's features

Important:

- The AyaNovaLite program files are installed by default to C:\Program Files\Ground Zero Tech-Works Inc\AyaNova folder
- The AyaNovaLite database file AYANOVALITE.FDB is installed by default to %AllUsersProfile%\AyaNovaData folder
    - On a Windows 7 and newer computer, this usually is the C:\ProgramData\AyaNovaData folder
    - On an older OS such as XP or 2003 computer, this usually is the C:\Documents and Settings\All Users\Application Data\AyaNovaData folder

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- Refer to Backup & Restore for AyaNovaLite

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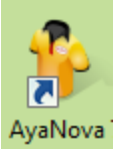
2.3 Toggle between AyaNovaLite and AyaNova

Once the trial AyaNova has been installed, now you can toggle between trying out the full AyaNova to trying AyaNovaLite.

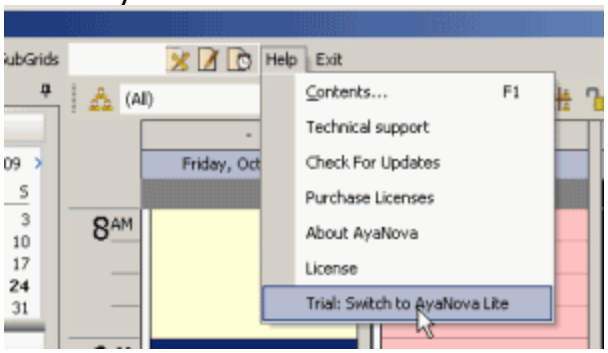
1. Run AyaNova

- Run AyaNova from the desktop icon



- **Or** run AyaNova from the Start -> All Programs -> AyaNova -> AyaNova menu option

2. If AyaNova is in the limited trial mode, select the menu option Help -> Trial: Switch to AyaNovaLite



- AyaNova will exit
  - your config.txt file will automatically be edited to point to the AyaNovaLite database file AYANOVALITE.FDB .
- Now run AyaNova again
- AyaNova will load directly to running the AyaNovaLite version.

NOTE: there is no login screen as AyaNovaLite is for a single user on a single computer. If you require a networked version, you will want to run the full AyaNova.

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NOTE: the menu option to toggle between AyaNova and AyaNovaLite no longer displays as of AyaNova 7.5(patch 8) August 22 2018

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2.4 Evaluation trial AyaNovaLite restrictions

The evaluation trial AyaNovaLite has the following restriction with all other features enabled:

1. 45 day trial period

- We encourage you to initially use the sample data in the database so you can test out all features of AyaNova without having to enter in data to start with and follow along with the tutorials.
  - Although the sample data provided with the trial AyaNova is loosely geared towards that of a computer service organization, AyaNova has powerful features to help manage all aspects of service and repair for any organization that provides service of any kind including auto repair, plumbing, locksmith, alarm and security, HVAC, appliance repair, medical equipment repair, electronics repair, computer service, lawn care, property management, schools, municipal maintenance, and many more.
- After following along with the tutorials to first familirize yourself, only then erase the database and start fresh with your own data.
- There is no need to download anything further as you will be sent activation instructions to activate the AyaNovaLite database that you have already downloaded and installed.
- Refer to the menu option in the AyaNovaLite program under Help for purchasing information. Or visit us at our website https://www.ayanova.com for contact information, for answers to common questions, and for our AyaNova Support Forum which in addition to providing support, includes topics and information posted by other AyaNova users.

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2.5 Suggested Order of Setting Up AyaNovaLite once Licensed

The following is a suggested order for setting up AyaNovaLite for the first time. This is a suggestion only, you do not necessarily have to do things in this manner, many items can be entered on the fly but it's helpful to go through this and follow the help links.

Suggested Order and link to Help Topic
Go through How do I...?'s first to get an overview of use
Set up backup routine for your stand-alone backup configuration
Edit the Lite User name - see Users
Create Tax Codes (to be used as defaults in Global Settings)
Locales (create a custom locale if you want to change the text displayed in AyaNova and set as default in Global Settings)
Erase the AyaNova data entered to start fresh or manually delete objects if applicable
Set your Global Settings
Create Labor and Travel Rates for selection in workorders
Create Clients
Create Vendors
Create Parts
Create Workorder Categories
Create Workorder Statuses
Create Workorder Item Types
Create Priorities
Customize existing report templates for your company and create new report templates

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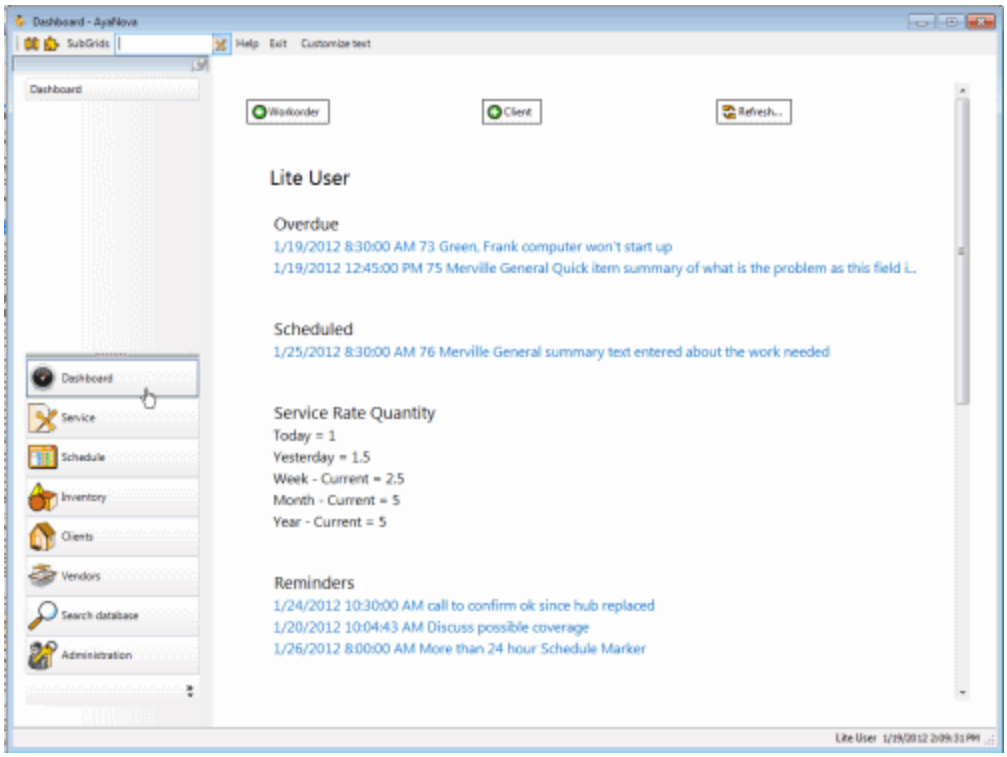
Tips & Tricks

3 Tips & Tricks

3.1 Dashboard

A new feature added with AyaNova Lite 7.2.0.0 is the Dashboard



The Dashboard is where you can quickly see at a glance, as well as access:

- **Overdue** provides links to service workorders that were scheduled prior to today's present time and date as a reminder so that you do not forget to enter your labor, parts, etc as well as checkmark Service Completed.
- **Scheduled** provides links to service workorders that are scheduled after today's date and time
- **Service Rate Quantity** shows at a glance totals for today, yesterday, current week, current month and current year of your Labor hours (or whatever the unit charge is that you use). The label Service Rate Quantity is taken from your Labor section of your service workorder entry screen.
- **Reminders** show the next three future dated Schedule Markers or Follow Ups assigned.

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Which screen shows first on login:

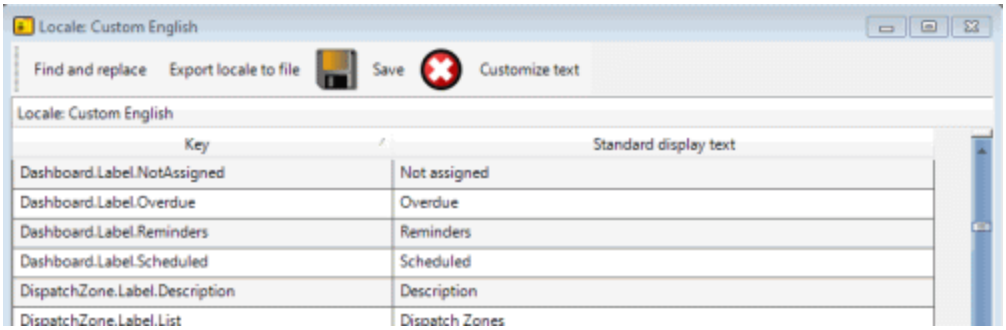
As with the other navigation pane grids of AyaNova, if viewing the Dashboard when exit out of AyaNova, the Dashboard will be the first screen that displays when you next log in.

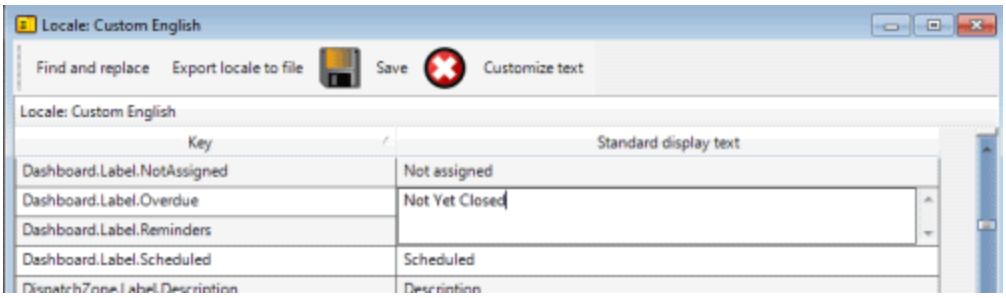
Customize label text:

As with all labeling in AyaNova Lite, you can also localize any of the labels test to what works **for you and your company**.

For example, you can localize what is presently labeled Overdue to instead be labeled Not Yet Closed.

Do refer to the tutorial on editing a custom locale for how to details.





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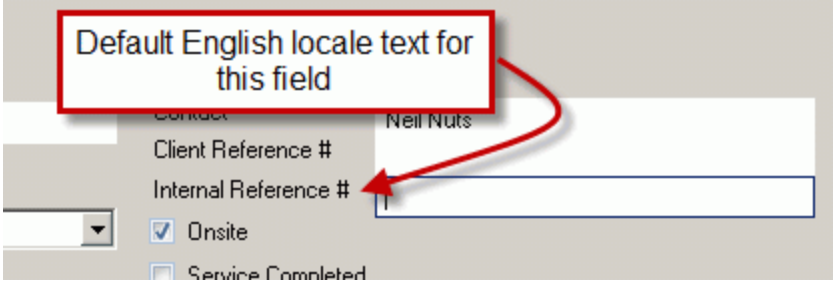
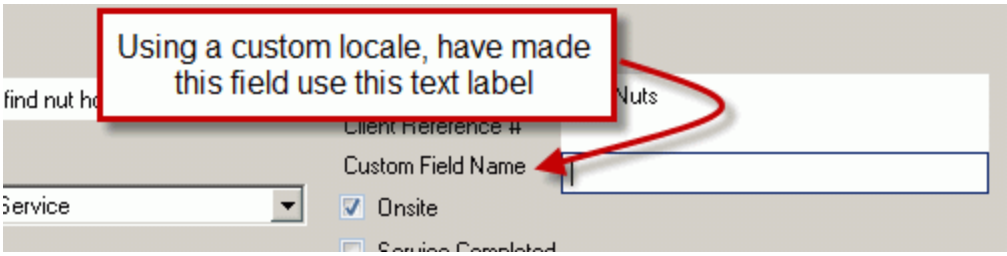
3.2 Localize field labels

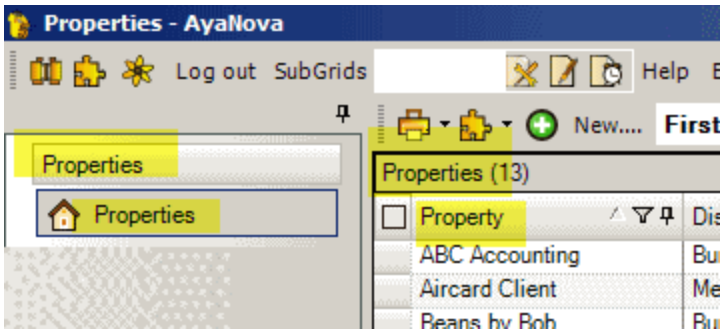
One of the many features of AyaNova is the ability to have the labels in AyaNova say what works best for your service type and company.

- For example, the field that is presently labeled *Internal Reference #* in the Service Workorder entry screen can be labeled something else - perhaps a label for other data that you want to always have entered for every workorder





- Or another example, you might provide property management service, so where AyaNova presently is localized to Clients and Client, it may make more sense for your type of service if these were labeled as Properties or Property.



- See the [How do I create a new custom locale using the Localized Text Design?] for a walk through example of localizing in AyaNova Lite using the Administration's Localized Test Design.
- See the [How do I customize an existing locale on the fly?] for a walk through example of localizing using the menu Customize text.... within an entry screen

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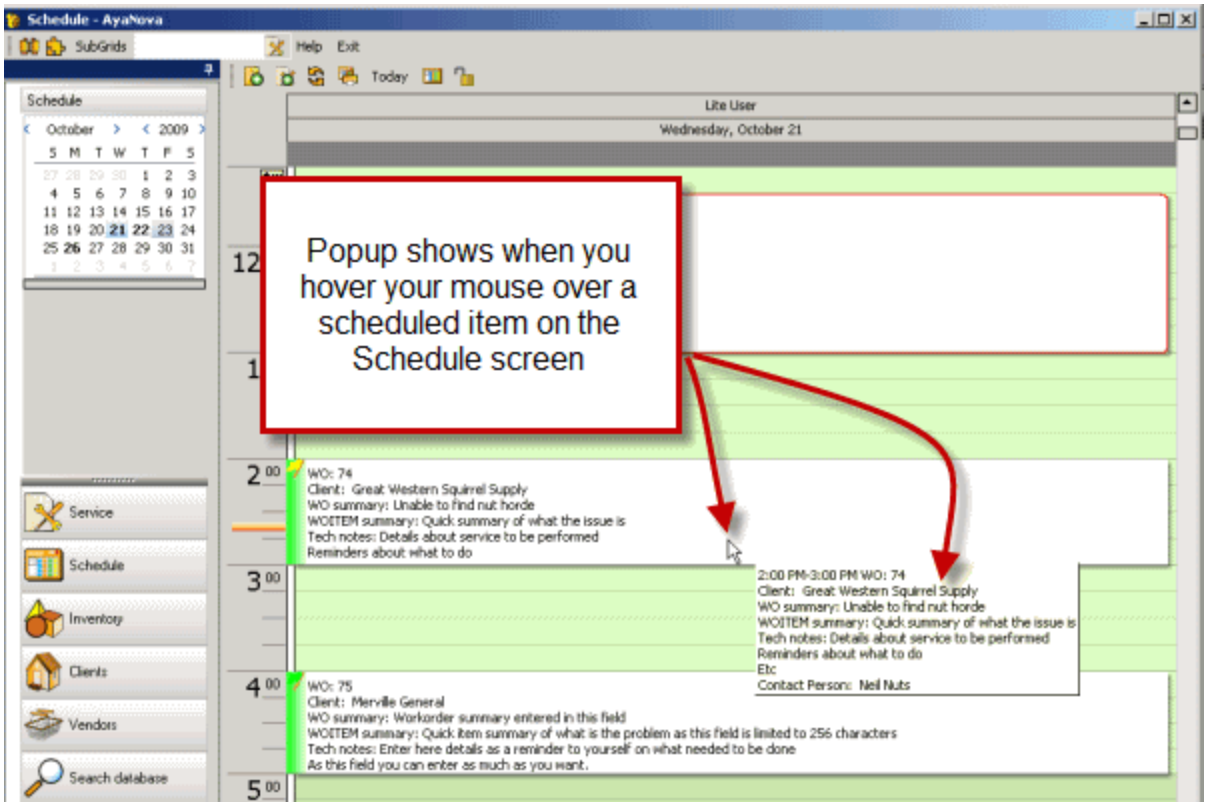
3.3 Edit what displays in popup on the Schedule screen



When you hover your mouse cursor over a scheduled workorder item on the calendar, AyaNova will "pop-up" a summary of what the workorder item is about.

- What displays in this popup is dependant on what you have set in your Global Settings for the Workorder Item Summary Template
- See the [How do I edit what pops up on the Schedule screen for a workorder item?] for a walk through on how to edit what displays here.

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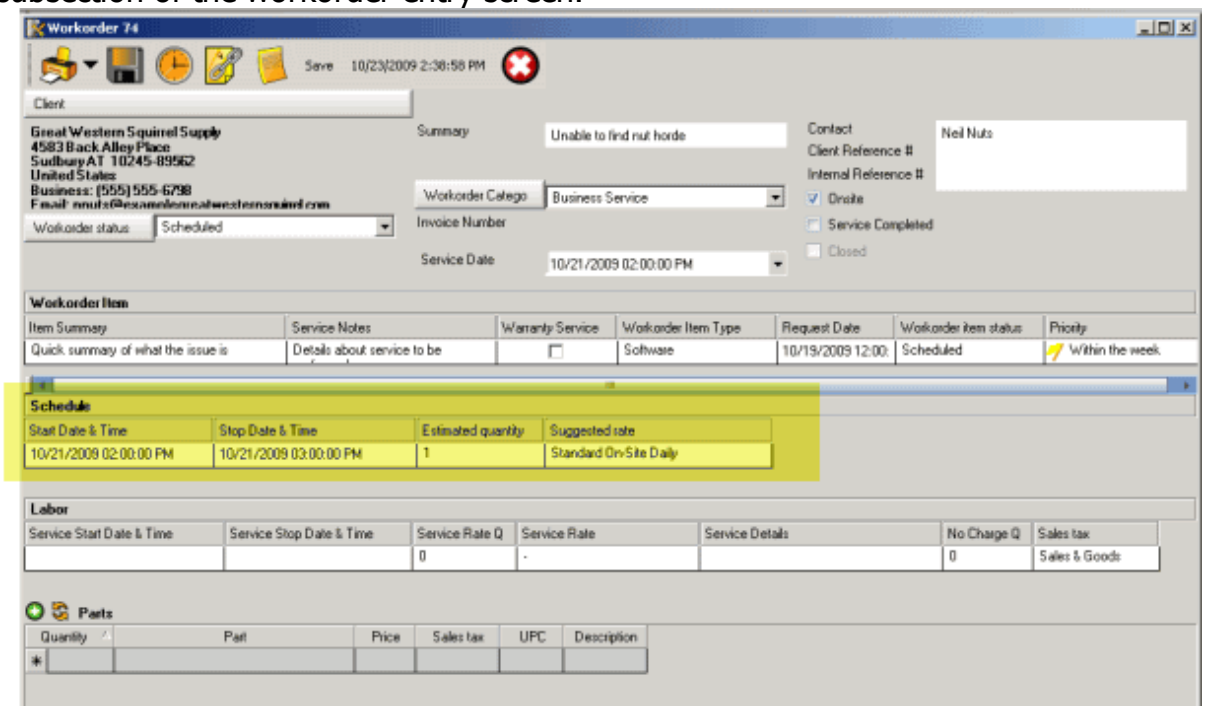
3.4 Scheduling

Refer to the following sections for details on creating a service workorder and scheduling

- Creating new workorder for a client
- What do I use a service workorder for?
- Create a new Service Workorder
- Service Workorder - Scheduled Users subsection
- Schedule Screen
- Basic overview of a workorder
- How do I schedule a user for a new workorder item via the Schedule screen?

Schedulable users are scheduled within the service workorder in the Schedule subsection of the workorder entry screen.



What is scheduled in the Scheduled Users subsection of the service workorder displays in the graphical Schedule screen

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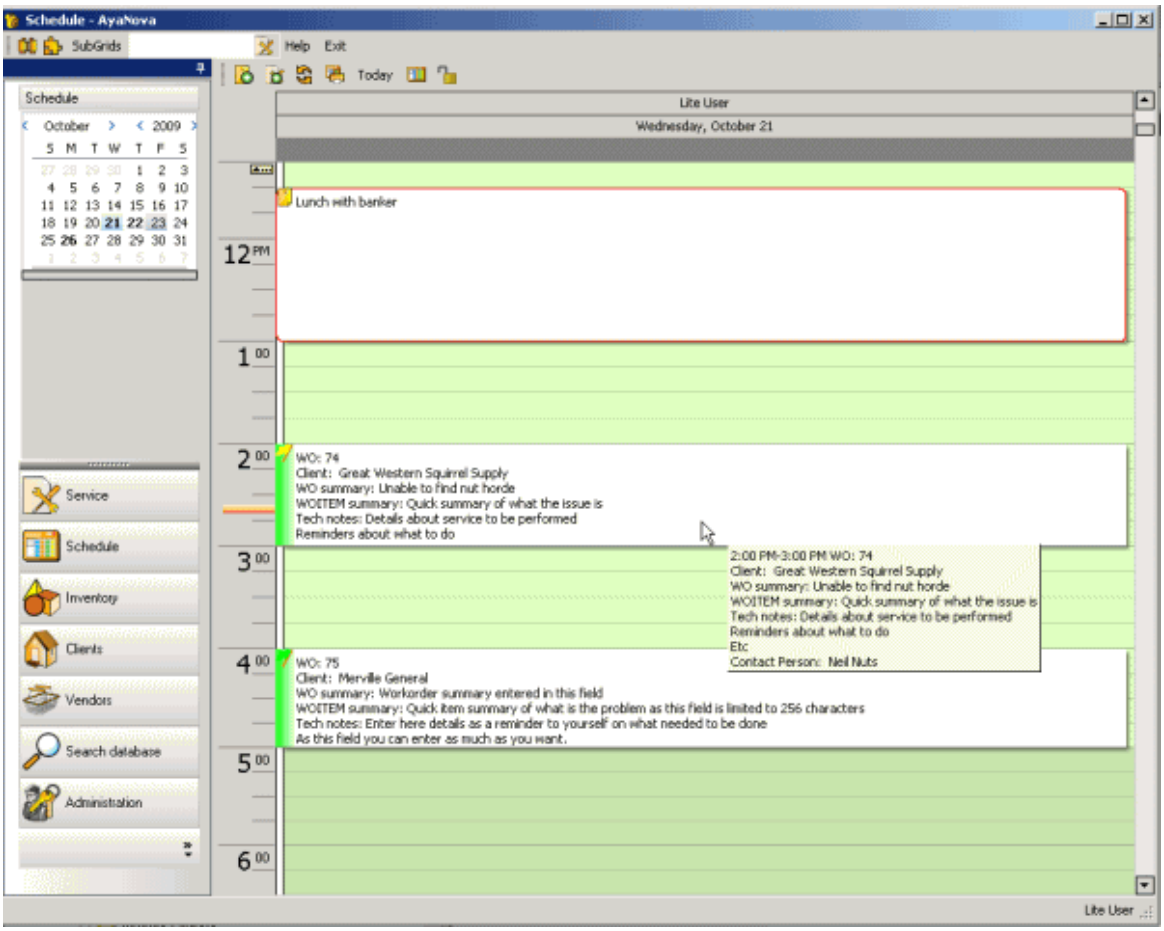

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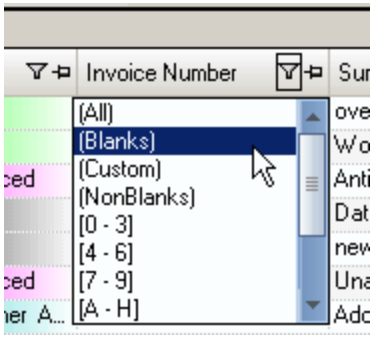
3.5 Filtering a grid

Filtering a grid restricts what displays on that grid making it easier to find the record you need to access.

Filtering also restricts the amount of information that needs to be retrieved from the database resulting in faster performance.

You also filter a grid so you can report on only the records displaying in that grid.

For example you might filter on the Invoice Number column to only show workorders that have this field blank - so that you can see at a glance which workorders still need to be invoiced out.



- Filtering can be via one column or multiple columns in one grid.
- A clear on the column header indicates no filtering by this column is occurring.
- A colored on the column header indicates that filtering by this column is occurring.
- You will note that the Filter Drop List will show **No Filter** in the Filter Drop List if a filter is not set, or it is in the middle of a filter not yet saved or if you are presently viewing a previously saved filter

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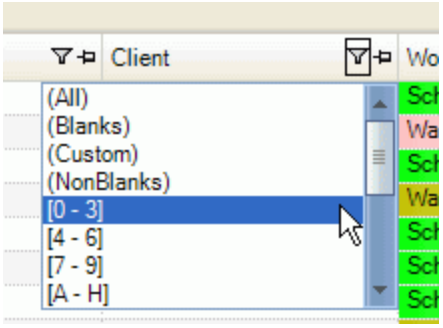
- Click on the object in the column heading to drop down a selection list of what to filter by. There are many choices depending on the type of data the column lists.



- You could select (ALL) to set no filtering, or depending on the type of data displaying in that column possibly [A – H] to display only data that begins with the letters A through H, and so on, or scroll further down to select a specific already displayed data to filter by.

- It is suggested that you try different scenarios till you get the results you need. You can always return to (ALL) or any other filtering easily.

See also:
How do I filter a grid and print a report for the records that show?
How do I create a custom filter?
Using the Filter Drop List
Listing all workorders for a specific client

The last viewed filter(s), sort order, pinning and navigation pane grid showing when an AyaNova user exited out will be the filter and navigation pane grid showing when they next log in.

NOTE: Your Regional Settings on your computer itself for Time should include seconds so that you can select specific date/time when filtering on such columns as the Service Date in a workorder, the Labor's Service Start Date & Time, etc

- Certain date fields are automatically pre-entered for you when you perform something.
- For example - when you create a new service workorder, the Service Date defaults to today's date and time (including seconds);
- Because the date and time are stored internally in the database including seconds, for you to be able to select a specific date/time to filter by, you must be showing the seconds so that the filter results include the specific record date.

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- Otherwise, if you do not have seconds displaying, your filter results may show nothing.

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3.6 Jump buttons via grids

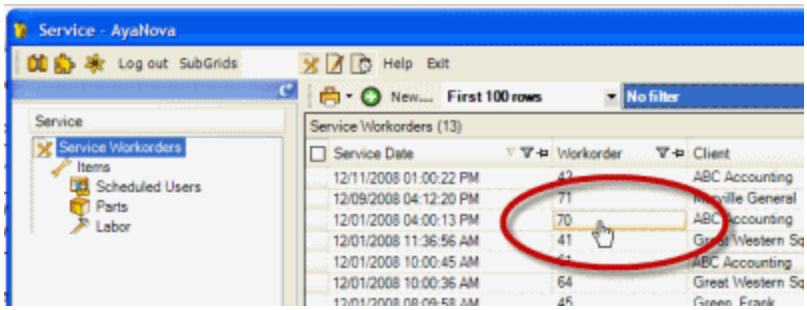
Grid "jump buttons" are available in main grids to open that record for viewing or editing.

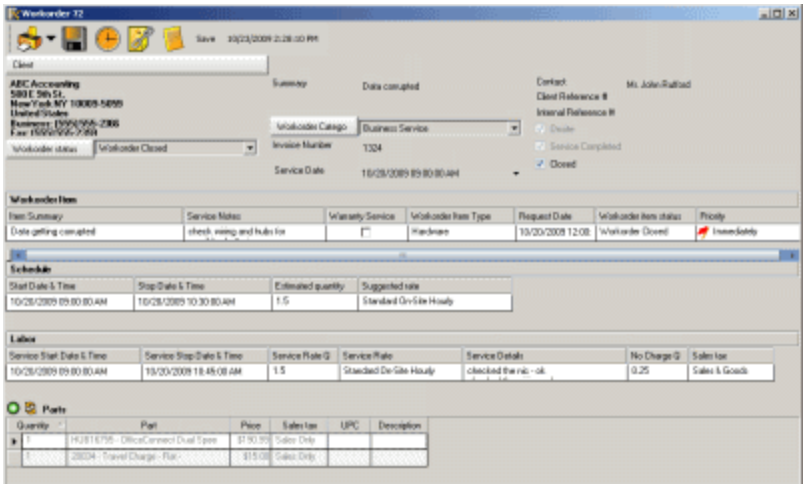
See also:

Accessing data displayed in main grids
Adding, editing and deleting data for display in a main grid

For example:

1. In the Service Workorder grid, click on a specific workorder number under the column Workorder, which will "jump" you to that specific workorder's entry screen so that you can edit and view.





2. Another example from the Service Workorder grid - click on a cell under the column Client, which will "jump" you to that Client's entry screen so you can view or edit or as needed

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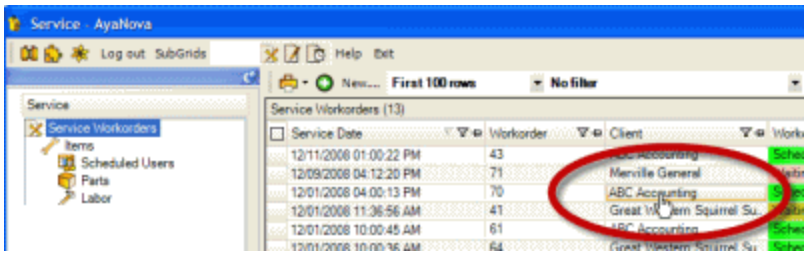
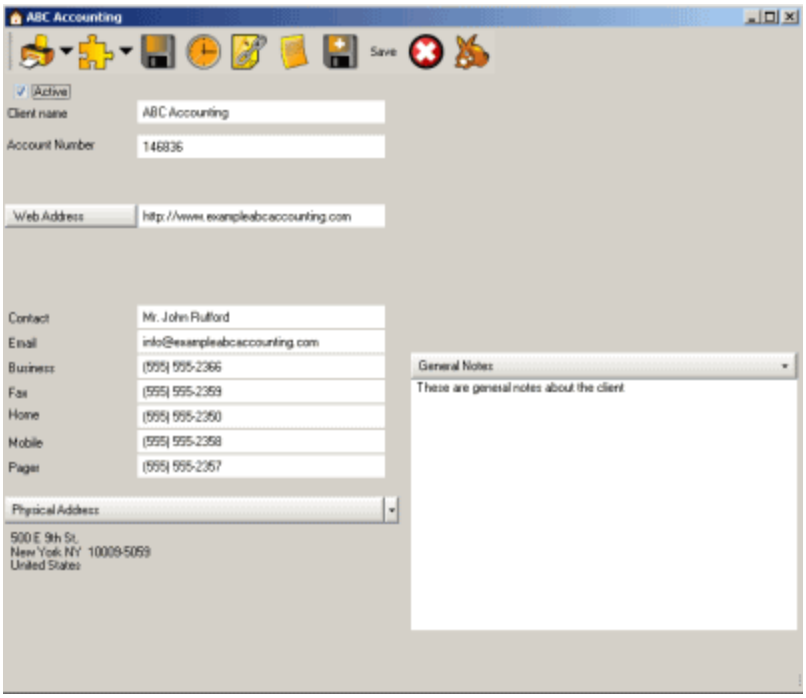
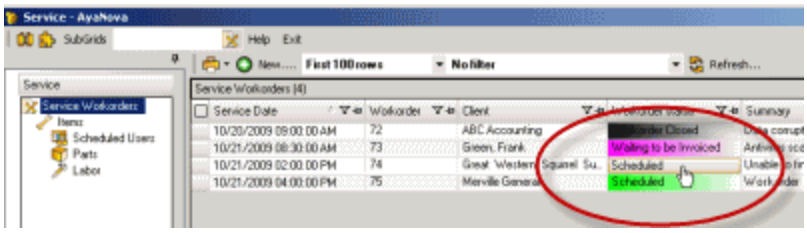
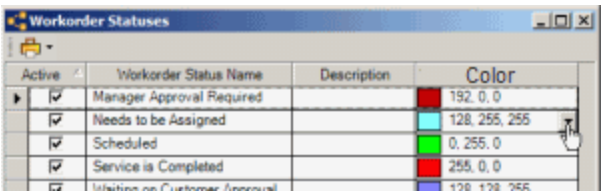




3. Another example from the Service Workorder grid - click on a cell under the column Workorder Status, which will "jump" you to the Workorder Statuses sub-grid so that you can view all and edit if needed.





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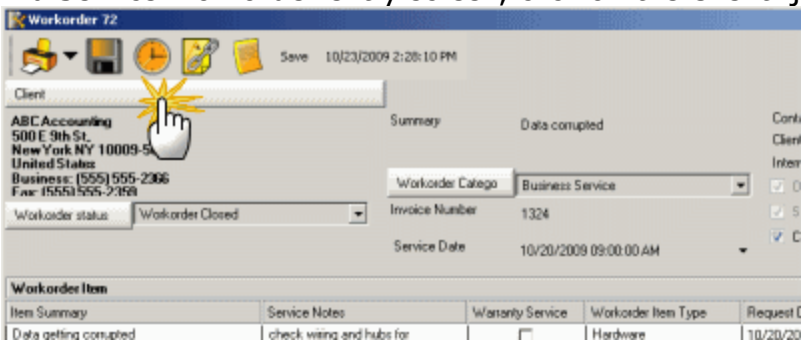
3.7 Jump buttons via entry screens

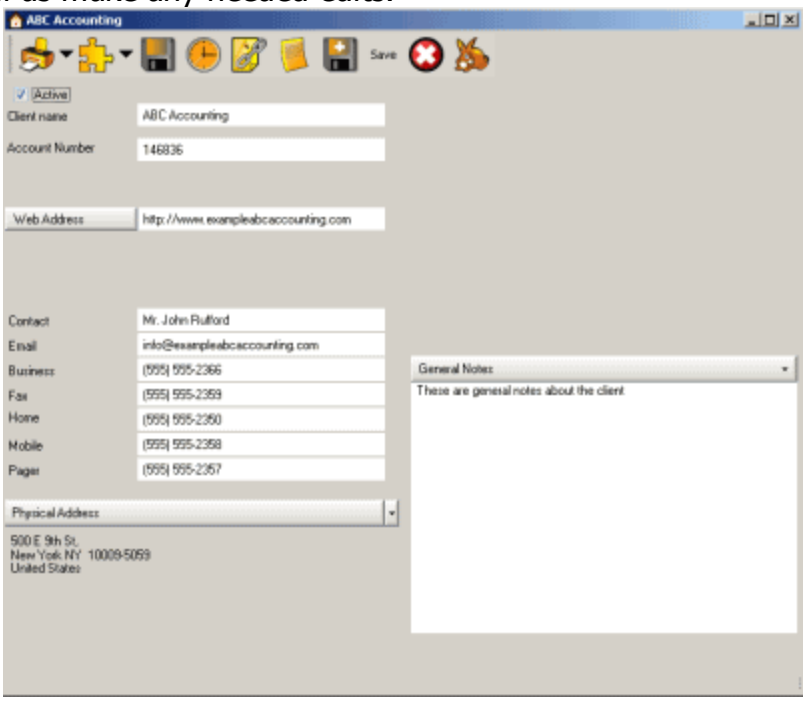
These buttons provide a quick way to access records that go into selection lists in entry screens for viewing and editing.

For example:

1. In a Service Workorder entry screen, click on the Client "jump" button



2. This will open that client's entry screen, so that you can view all details, as well as make any needed edits.



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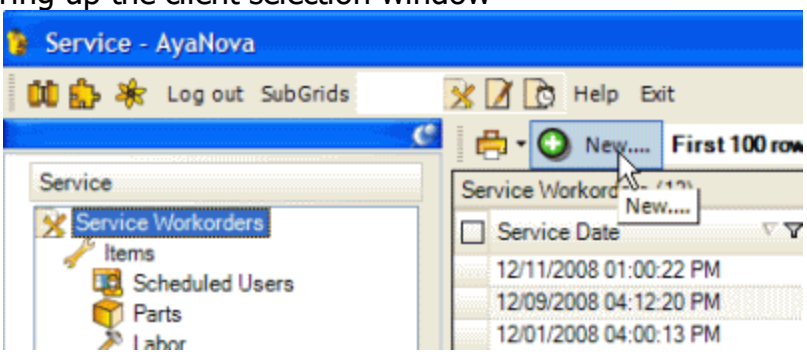
3.8 Creating new workorder for client

There are many ways to quickly create a new workorder for a client:

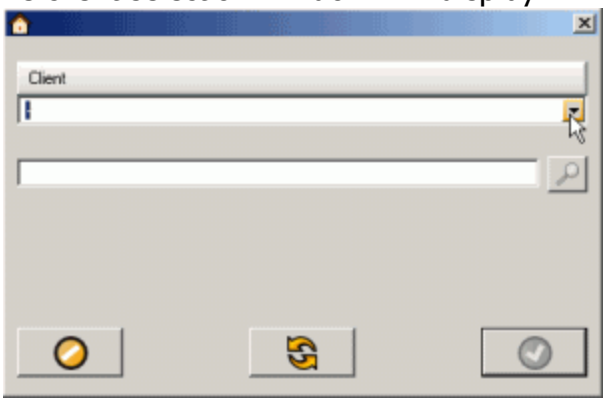
1. **Use the New... menu option on the Service Workorders grid**
2. **Use the Client Finder to quickly list the client for selection**
3. **Right-click on the client's name on any grid**
4. **Use the Search Database to quickly find the client and right-click on it**

1. Use the New... menu option on the Service Workorders grid

- In the Service navigation pane grids, select the New.... menu option to bring up the client selection window



- The client selection window will display



- Drop down and select the client from the selection list and create the new workorder by selecting the green OK checkmark.

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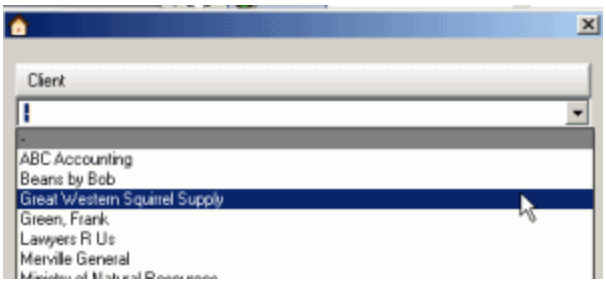
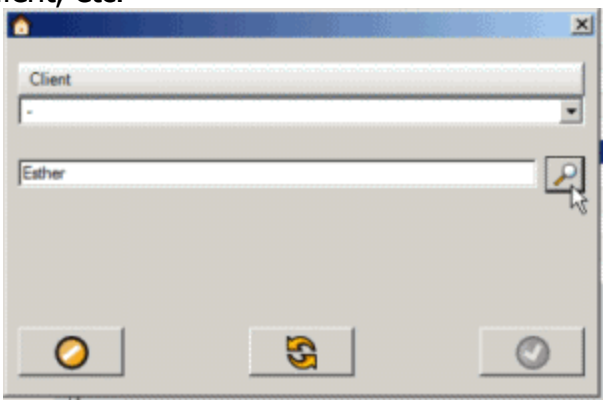


2. Use the Client Finder to quickly list the client based on search results

For example:

- You want to create a new service workorder for a client but only received their personal name, not the company's name
- In the Service navigation pane grids, select the menu option to bring up the client selection window
- Enter in text into the Client Finder field and select the find button. This text that you enter could be text entered in a previous workorder for this client, text in the client's entry screen, text in a unit entry screen owned by this client, etc.



- Clients will now be listed in the selection list that have this text entered in one of their related objects
- Select the client and create the new workorder

See also: Client Finder

3. Right-click on the client's name on any grid

For example:

- You are presently viewing the Service Workorders grid.

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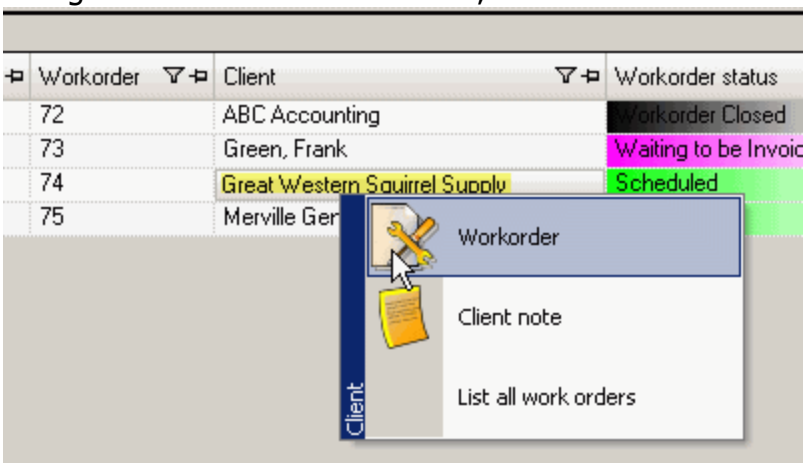
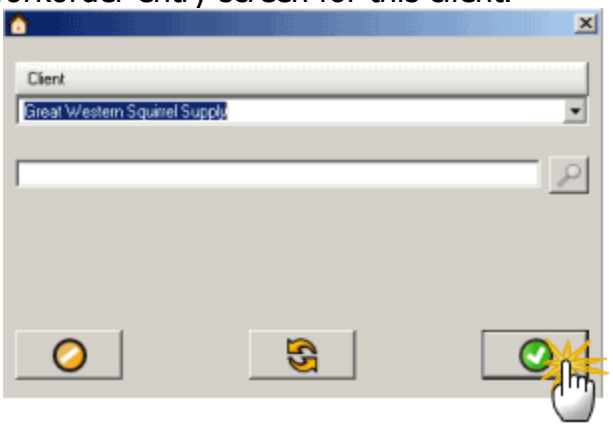
- You want to quickly create a new workorder for the client Great Western Squirrel Supply
- Just right-click on the client's name, and select Workorder.



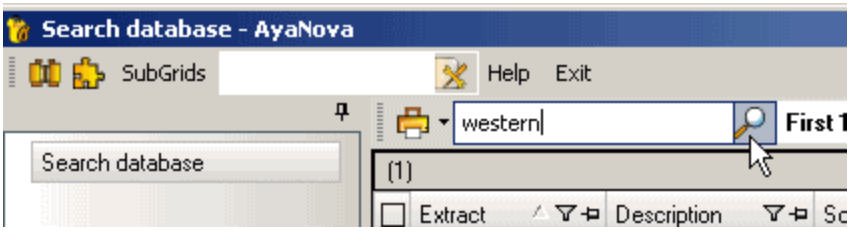
- The client selection window for a new service workorder will appear with that client already selected. Click on the green OK to open up a new service workorder entry screen for this client.



4. Use the Search Database to quickly find the client and right-click on it

For example:

- You want to quickly create a new service workorder for the client that has Western in its name
- Search for the text *western* in the Search Database section



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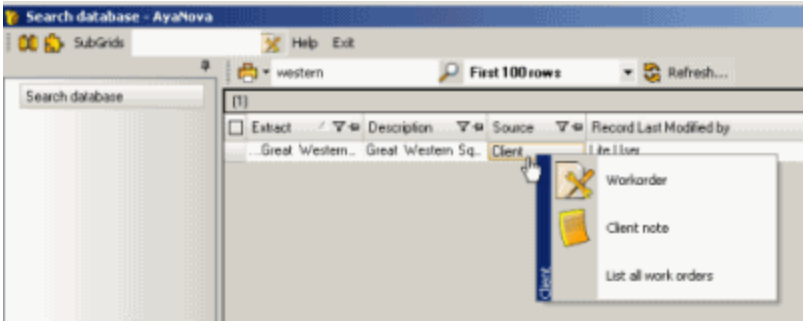
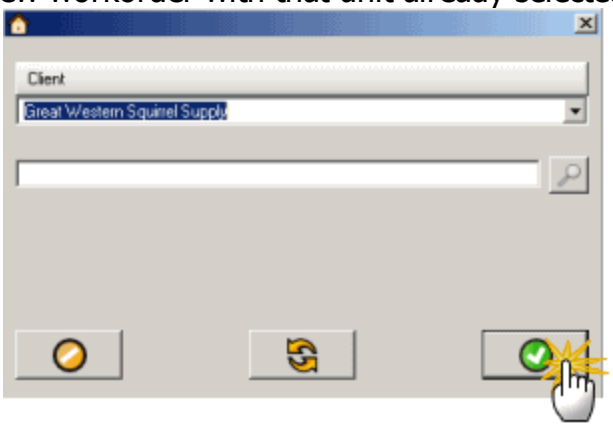
- Just right-click on the Source for the client you want, and select Workorder.



- The client selection window will appear with that client already selected for you. Select a template if desired and the green OK checkmark to open up a new workorder with that unit already selected.



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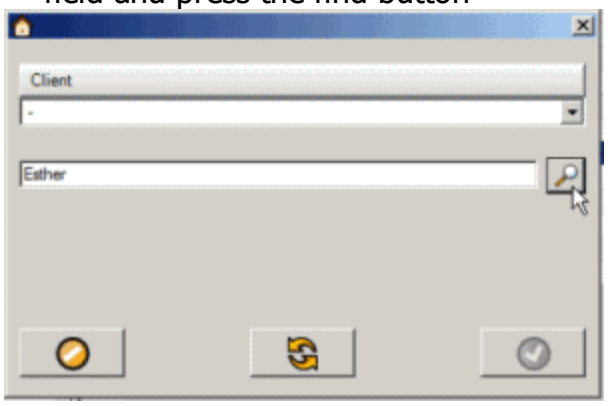
3.9 Don't know the client's name?

Use the **Client Finder** feature when creating a new workorder if you do not know the company name to select it from the drop down selection list.

Example of Client Finder use:

1. You are creating a new workorder for a client, but you do not know the client name
2. You do know the contact person's name Esther Williams but don't know the company name you previously entered into AyaNova as.
3. So you would create a new service workorder selecting the New...

menu option in the Service Workorder grid
4. By default, all active clients for your region will be displayed but as you don't know the client's name, you will use the Client Finder feature
5. In the client selection window, enter the text ***Esther*** in the Client Finder field and press the find button



6. Now drop down the client selection list - it will show all clients that have that text entered in one of its objects. In this example, there is only one client that has the text ***Esther*** listed in any of its related objects.

7. Select the client and create the service workorder

To clear the search to restore listing of all clients for selection, just select the Refresh button

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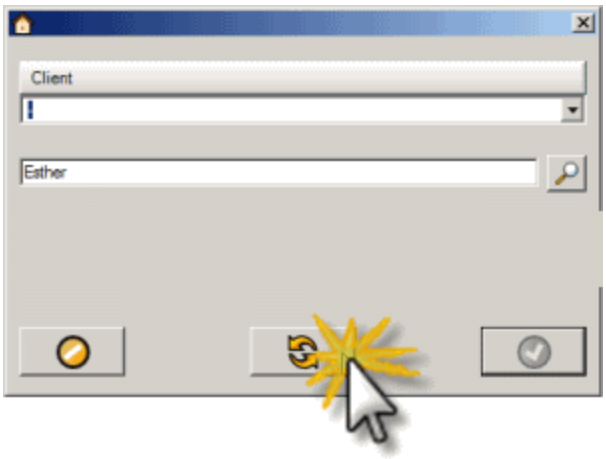

You can enter any text that was previously entered in any previously entered service workorder entry screen, in the client's entry screen or in a Client Note. This will narrow down the list of clients for selection so that you can quickly create the new service workorder:

You can use the asterisk * wildcard character at the start or end of a word to find all records that partially match your search word for the Client Finder.

Examples:

- ***cab**** would match the word cable or the word cabinet.
- ****sun**** would match "Samsung", you can also do it more than once so "*sun* not*" would match "Notes about Samsung"

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3.10 Listing all workorders for a specific client

Three ways to quickly show all workorders for a client:

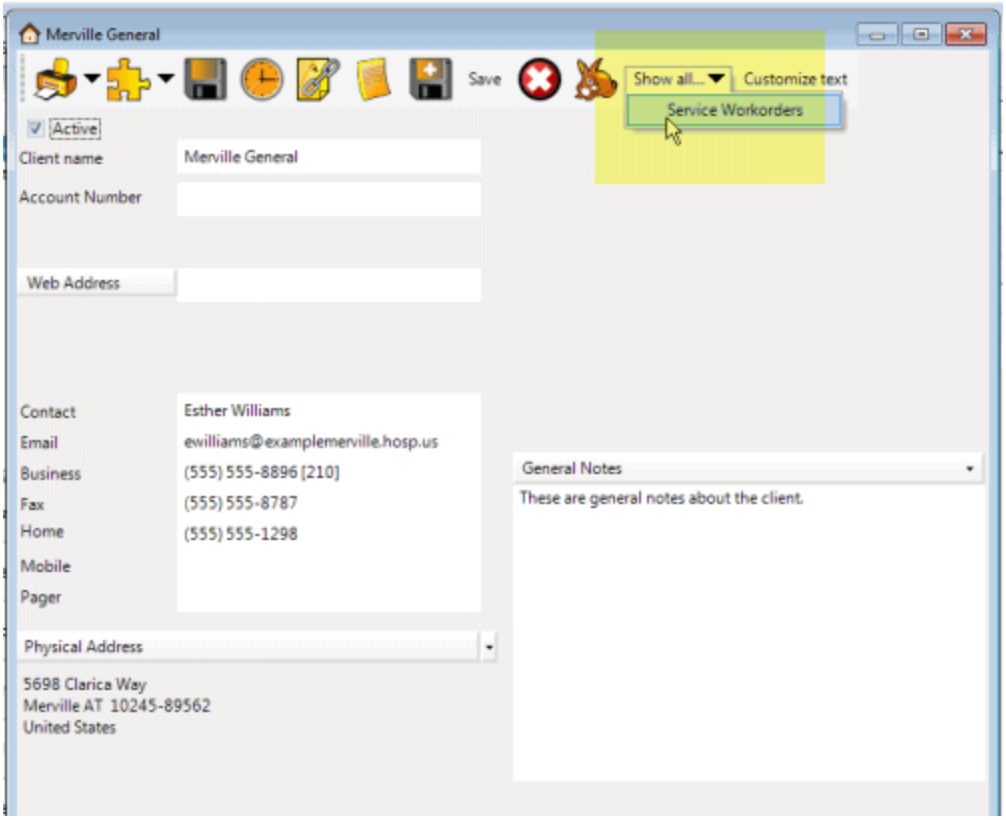
1. **Select the Show all... menu option in the client's entry screen**
2. **Select the Show all... menu option in a service workorder**
3. **Use the List All Workorders command from any grid**

1. Select the Show all... menu option in the client's entry screen

From the client's entry screen menu bar, select the Show all....Service workorders

AyaNova will automatically filter the Service Workorders grid for you, displaying all workorders for this client.

Note that the filter is not saved. And you can revert back to viewing all by selecting No Filter.



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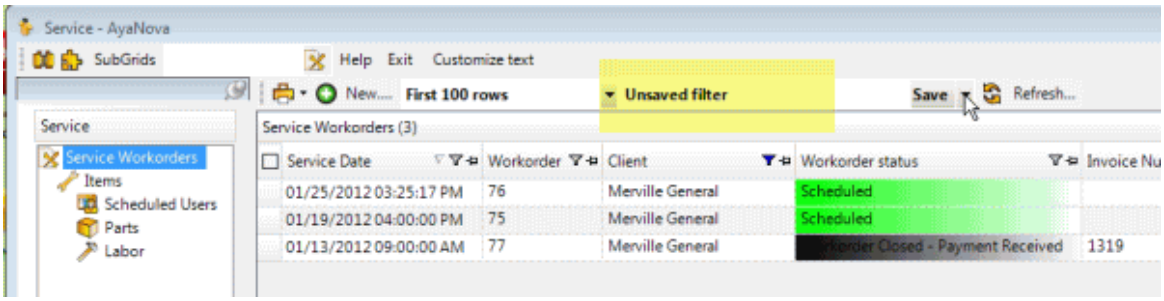
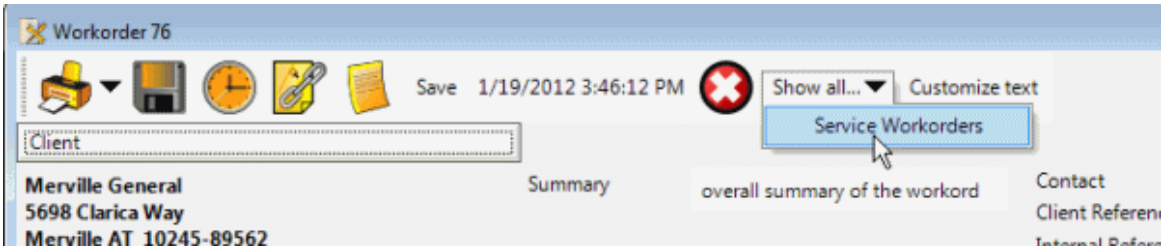


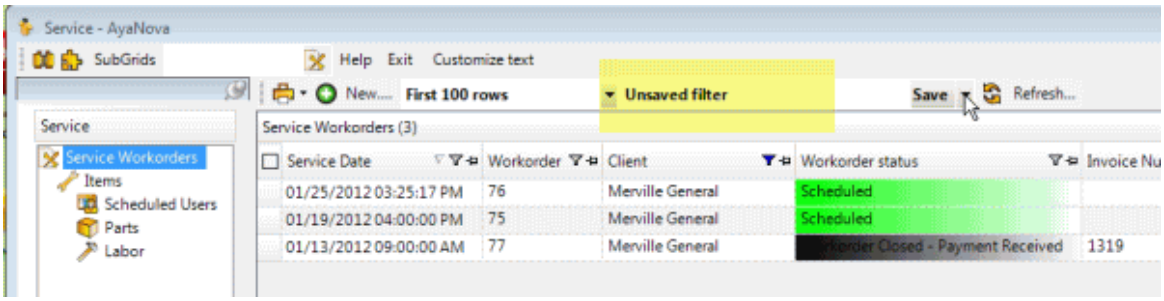
2. Select the Show all... menu option in a service workorder

From the service workorder entry screen menu bar, select the Show all....Service workorders

AyaNova will automatically filter the Service Workorders grid for you, displaying all workorders for this client of this workorder.

Note that the filter is not saved. And you can revert back to viewing all by selecting No Filter.





3. Use the List All Workorders command from any grid

A time saving feature is the **List All Workorders** command.

Anywhere you get the right click popup menu to make a new workorder when you right-click on a client, you can also select to **List all work orders** for that specific client or unit.

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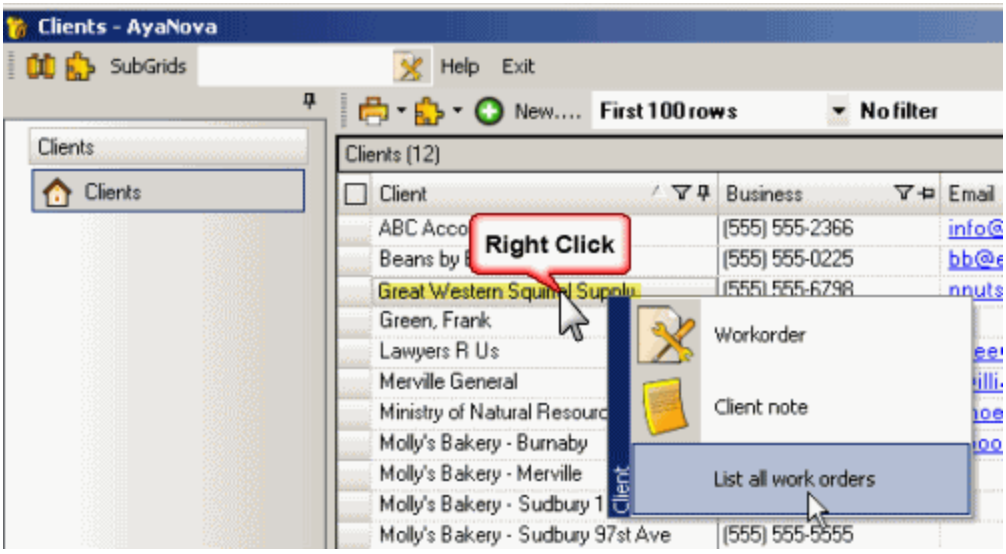
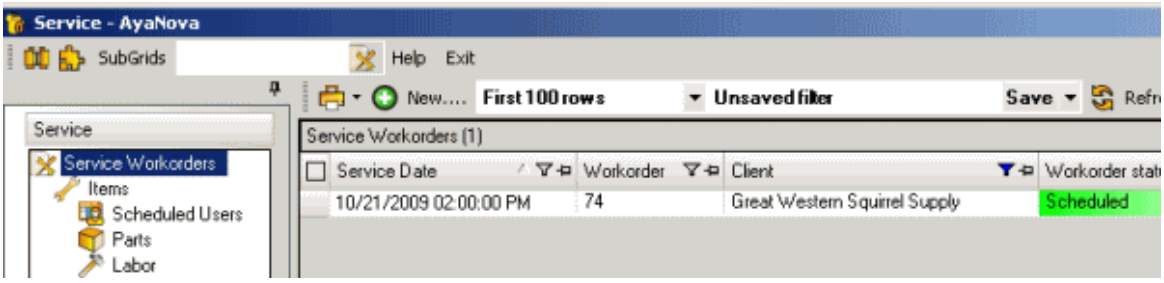
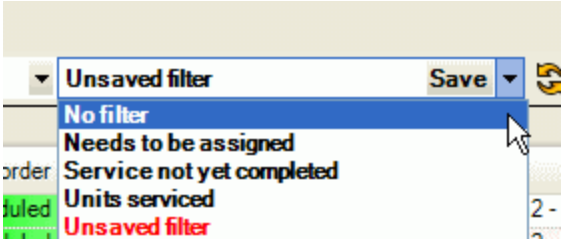
If you select to view all work orders for a client it responds as if you had filtered in the Service Workorders grid by the client selected. An unsaved filter is made on the client name to accomplish this.





If you do not want to save the filter, revert back to seeing all workorders by selecting the No Filter



This **List All Workorders** feature is in addition to the filtering ability of any grid where you can filter by any of the columns.

See also:
[Filtering a grid]

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3.11 Create client on the fly if not yet entered into AyaNova Lite

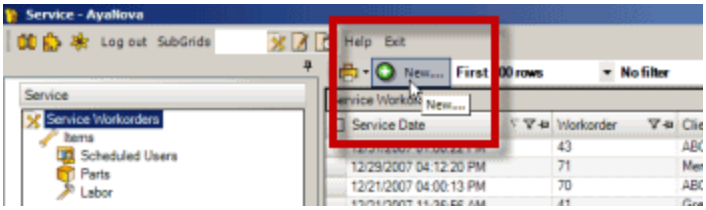
What if the client is not yet available for selection in your existing list of clients to choose from when creating a new workorder?

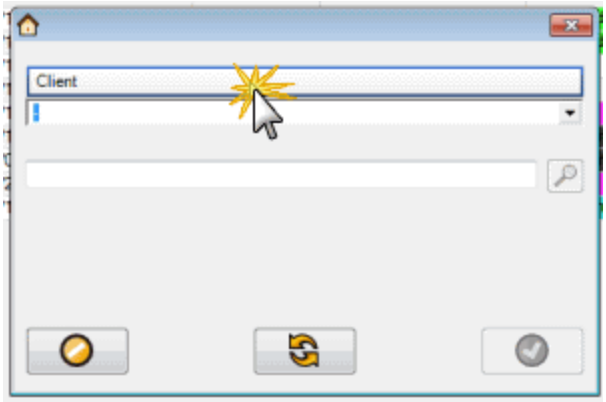
Easy - just create the client on the fly!

A. The client is not entered in AyaNova yet:

- You have dropped down the list of clients in the client selection window and the client is not listed
- You have used the Client Finder feature and no client displays for selection
- Such as the examples in the Tips & Tricks section [Creating new workorder for a client]

B. In the client selection window after clicking on New... to create a new service workorder, just click on the Client "jump" button with no client selected





C. Clicking on the Client "jump" button with no client selected will open a new empty client entry screen so that you can quickly enter in the Clients Name

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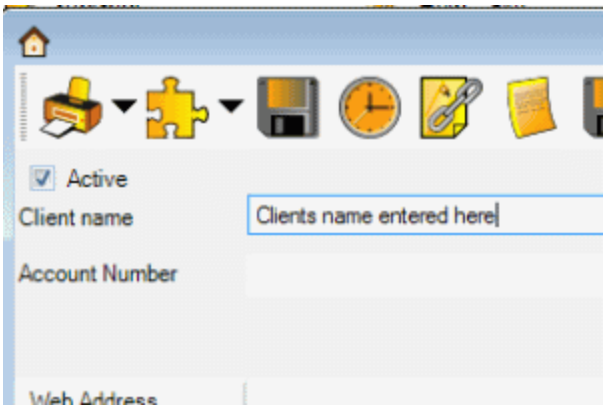
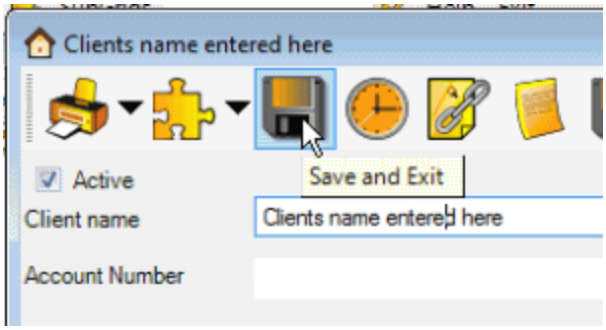
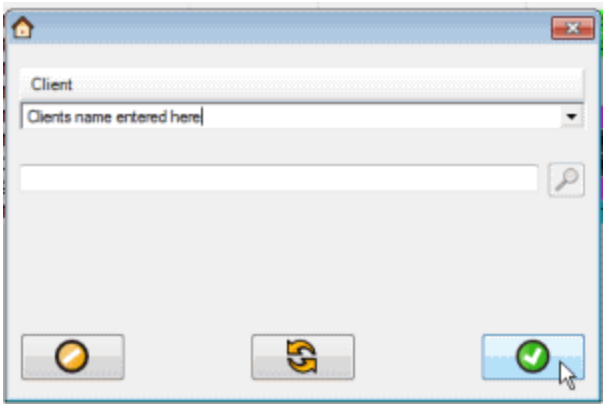


D. Click Save & Exit



E. And you are returned to the client selection window where you can now select that client you just created!



F. You can always go back into that client's entry screen at any time and add more details such as address, phone numbers, etc

Use the Client "jump" button from within the entry screen itself to open that client's entry screen.

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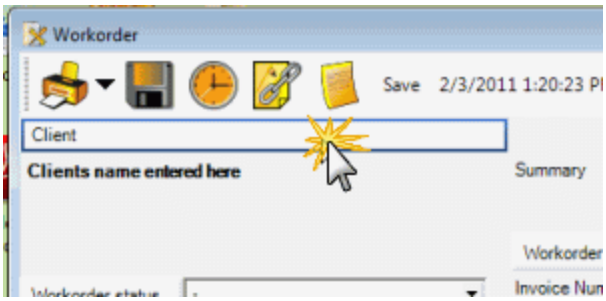
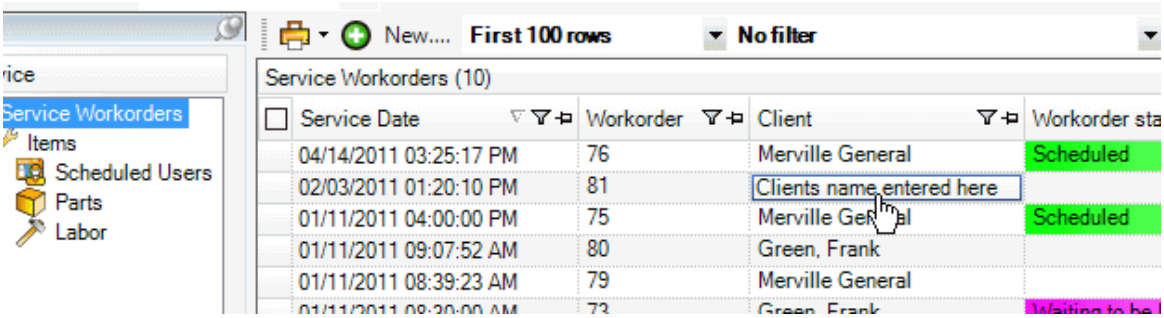


Or use the client "jump" button on any grid where that client's name is which will open that client's entry screen



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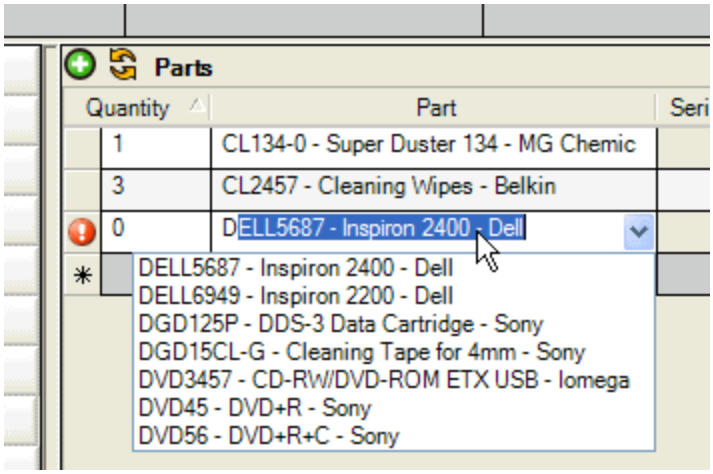
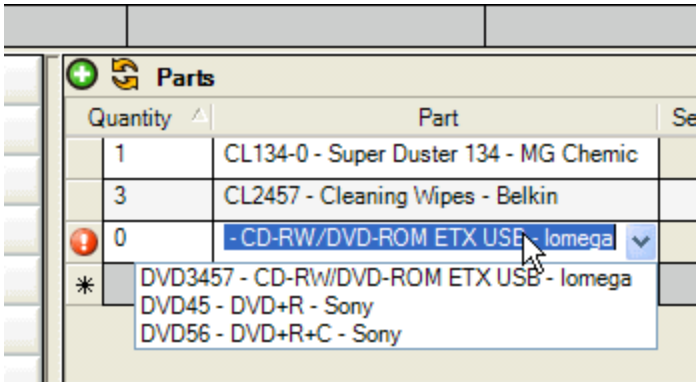
3.12 Drop-down fields

In addition to using your mouse to drop down field to select listed objects, a neat little feature for ease of use is the **auto-suggest** feature of the drop down fields so that you can easily see the items listed that match what you have entered so far, and easily select the correct one.

In the example taken from the Part subsection of a service workorder entry screen, the user typed in the first letter "d" and the drop down automatically lists all parts that begin with the letter "d"



If the user continues typing the characters "dv", AyaNova will move to the next part that begins with those characters "dv"



And of course you can use your mouse to select the drop arrow to display the list, and scroll down as needed too.

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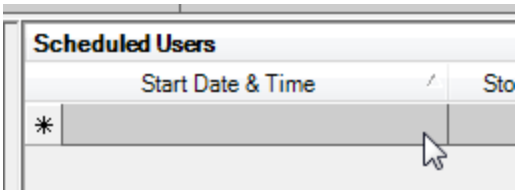
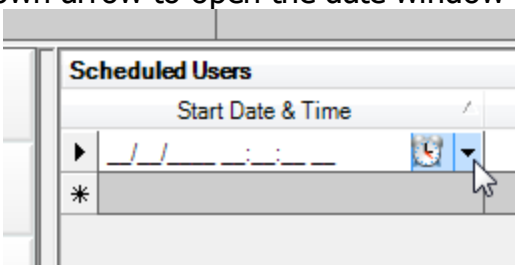
3.13 Date and Time selection

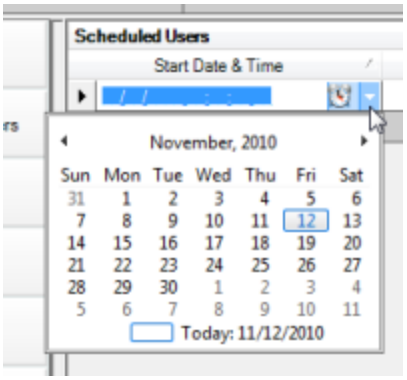
1. Example of how to select and edit the date in a date/time field
2. Example of how to select and edit time in a date/time field

Selecting and editing Date:

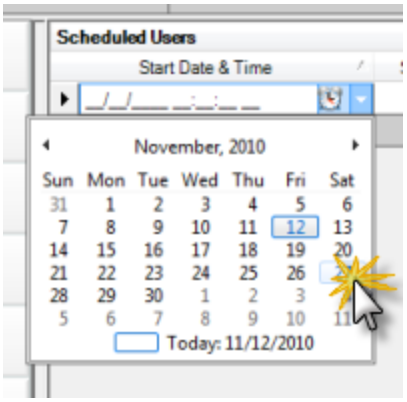
A. To select a date, select the drop down arrow to open the date window







B. Click on a date



- Use the side arrows to move to different months

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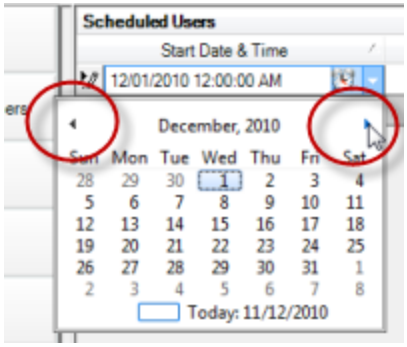
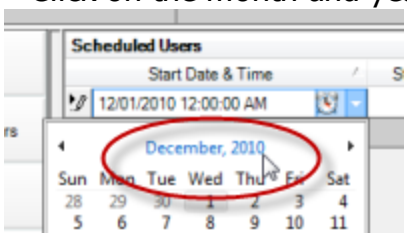
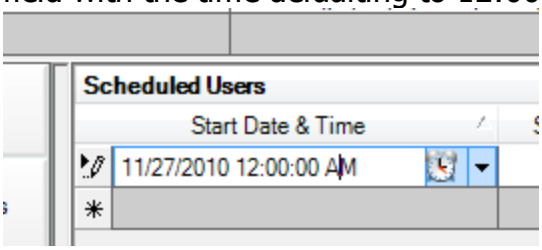


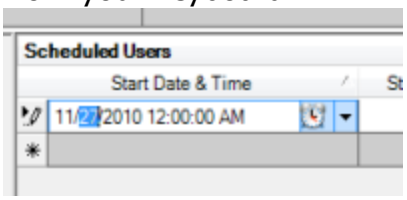
- Click on the month and year to select a different year or month.

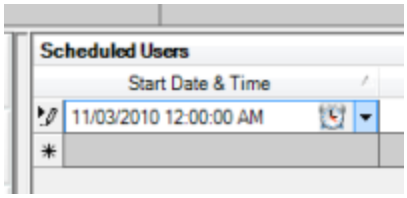


C. When you click on a date, it closes the date selection and returns you to the field with the time defaulting to 12:00 AM



D. You can also manually edit the date by highlighting and typing the number from your keyboard.





Selecting and editing Time:

A. To edit the time, click on the clock and select one of the time selections

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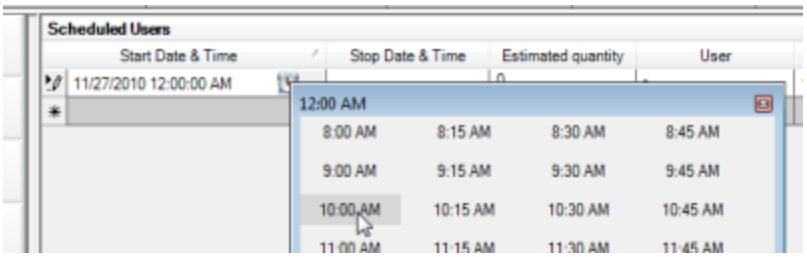
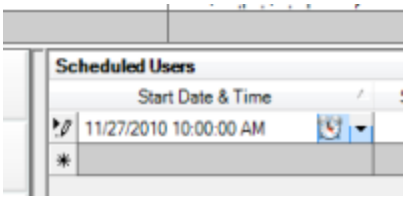
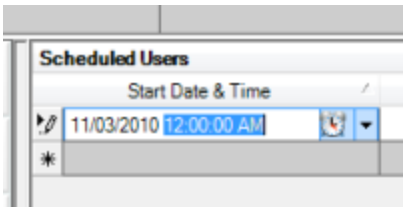


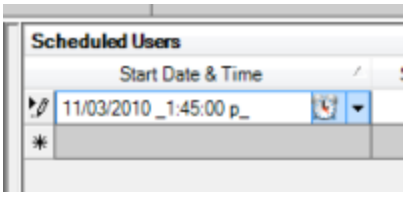


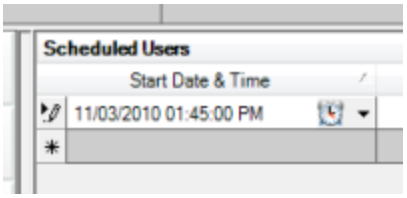
B. You can also manually edit the time by highlight, and type in the scheduled time including pm or am and then tab off.

For example, in these screen shots, we want to scheduled the start time for 1:45 PM.

Our time display includes showing for seconds, so we would type in "14500pm" and tab off. There is no need to type the colon or spaces as your operating system in this instance is set to use PM and AM, and therefore "knows" that there is not a time that would be 14:50PM. If the scheduled time was instead to be 1:00 PM, you would in this instance type in "0100pm". Otherwise typing in "100pm" it would assume you meant 10:00PM.







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- Also note too that you can click within the date time field, and use your keyboard **left or right arrow keys** to be in the hour, or minute or second to am/pm part of the time, and then use your up or down arrow keys to increment or decrement.

AyaNova will use your Regional Settings for Time format – if your time format is set to use 24 Hour, time will display in the AyaNova program and reports by default also as 24 Hour. If your time format is set to show seconds, then AyaNova will show seconds too

See also:

Currency, Date & Time Display

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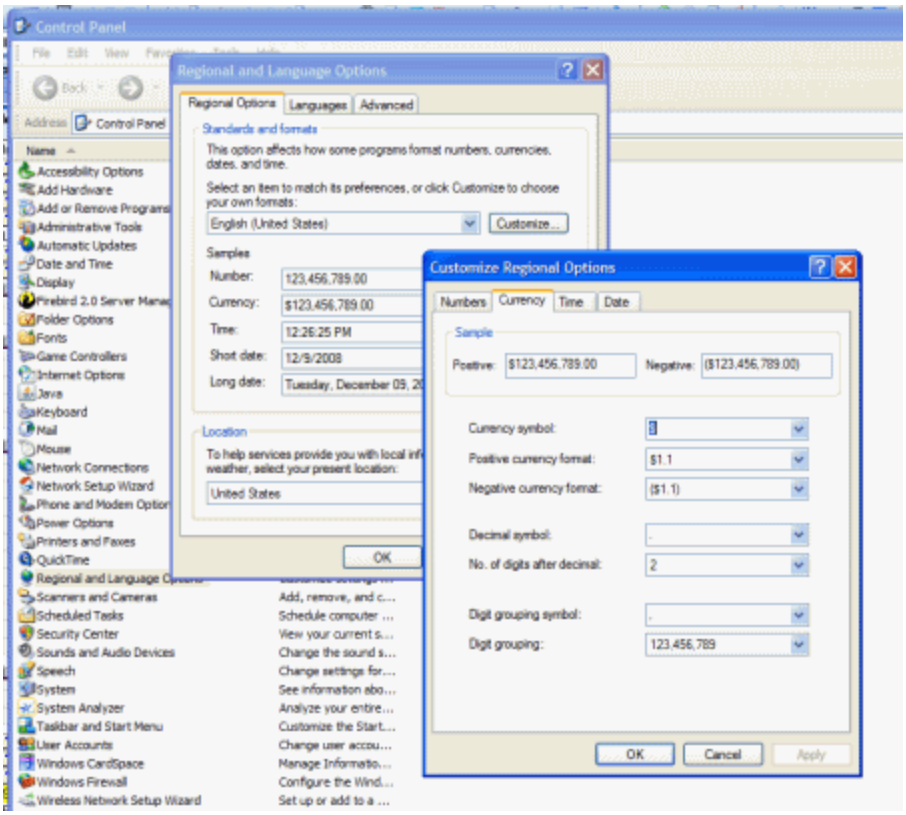
3.14 Currency, Date & Time Display

AyaNovaLite does **not** decide how to display currency symbols or how many digits are shown in currency, or what format of Date or Time to use.

AyaNovaLite instead "asks" your computer's operating system, Windows, what to use immediately before the AyaNovaLiteprogram opens and displays exactly as Windows "tells" it to.

If the currency symbol and format, or your Date or Time are not displaying how you want them to in the AyaNovaLite program the change needs to be made in your Windows Control Panel's Regional Settings



If the currency symbol, or date or time is displaying incorrectly in a report, it may be due to your Windows Control Panel setting – check first – **<u>or</u>** it may be that the symbol is preset in the report template, and you just need to customize the setting in the report template for that specific data field in that report template. Refer also to the AyaNova Support Forum section on report templates.

NOTE: Your Regional Settings for Time should include seconds so that you can select specific date/time when filtering on such columns as the Service Date in a workorder, the Labor's Service Start Date & Time etc

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- Certain date fields are automatically pre-entered for you when you perform something.
- For example - when you create a new service workorder, the Service Date defaults to today's date and time (including seconds)
- Because the date and time are stored internally in the database including seconds, for you to be able to select a specific date/time to filter by, you must be showing the seconds so that the filter results include the specific record date.
- Otherwise, if you do not have seconds displaying, your filter results may show nothing.

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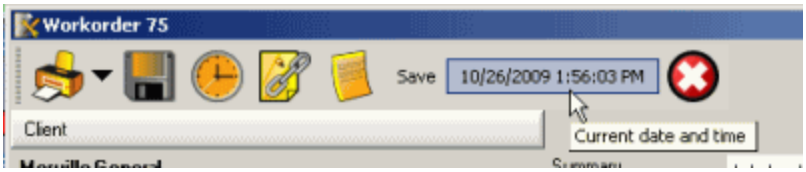
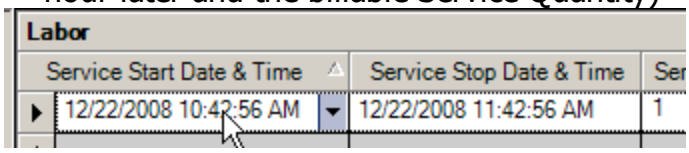
3.15 Current Date & Time feature in workorder entry screen as a timer



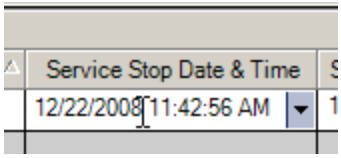
Displayed at the top of the service workorder entry screen is the present time and date. This can be used as a timer and/or entered into a text field.

Use as a timer (example: you track start and stop time in phone support)

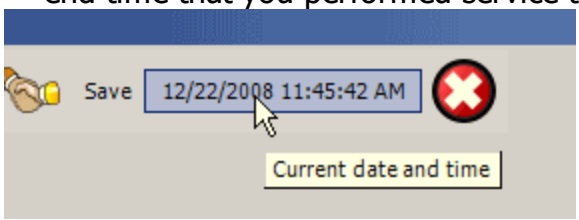
1. open a workorder for a client
2. move to the Labor sub-item
3. click within the empty Service Start Date & Time field which will automatically put in today's date and time (as well as Stop Date & Time an hour later and the billable Service Quantity)



4. when your phone service is completed, click within the Stop Date & Time field to select it



5. now click on the Current Date and Time. This will automatically enter in the end time that you performed service to



6. and AyaNova will automatically adjust the billable Service Rate Quantity for you as well. Edit as needed.

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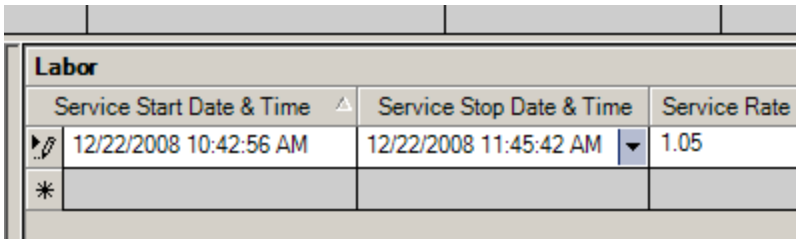
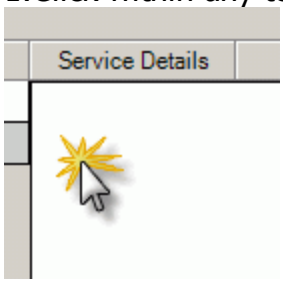
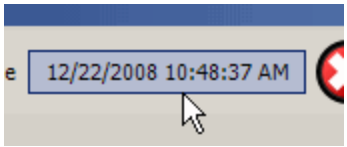


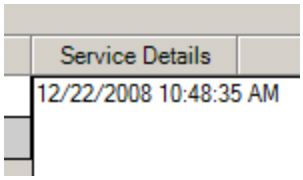
Enter the date and time within any text field (example: you want to note when you entered specific information)

1.Click within any text field



2.Click on the current date & time at the top of the service workorder to enter that date and time into the text field.





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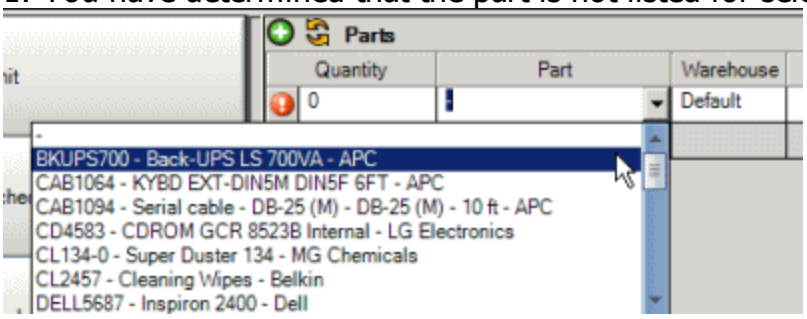
3.16 Part entry on the fly in a workorder

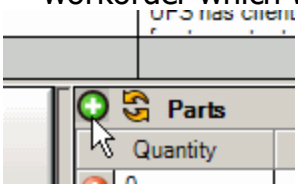
Take advantage of part entry on the fly in a workorder to save time.

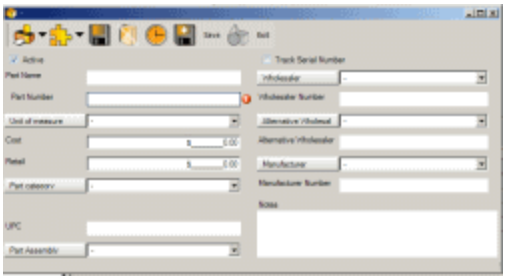
Instead of having to save and exit out of the workorder entry screen, then go to the Parts grid and create the new part, you can now use the "on the fly" part entry right in the workorder entry screen itself.

1. You have determined that the part is not listed for selection

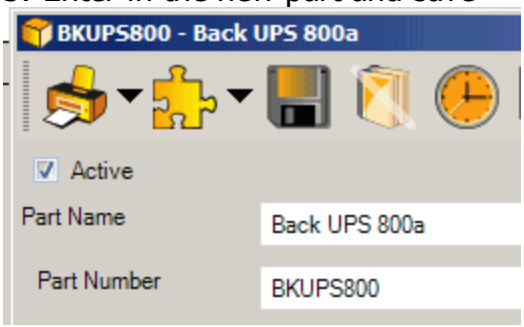


2. Select the New... part menu option within the Parts subsection of the workorder which will open a new empty part entry screen





3. Enter in the new part and save



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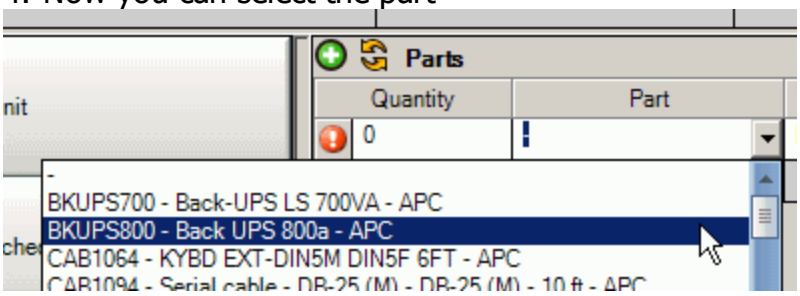
4. Now you can select the part



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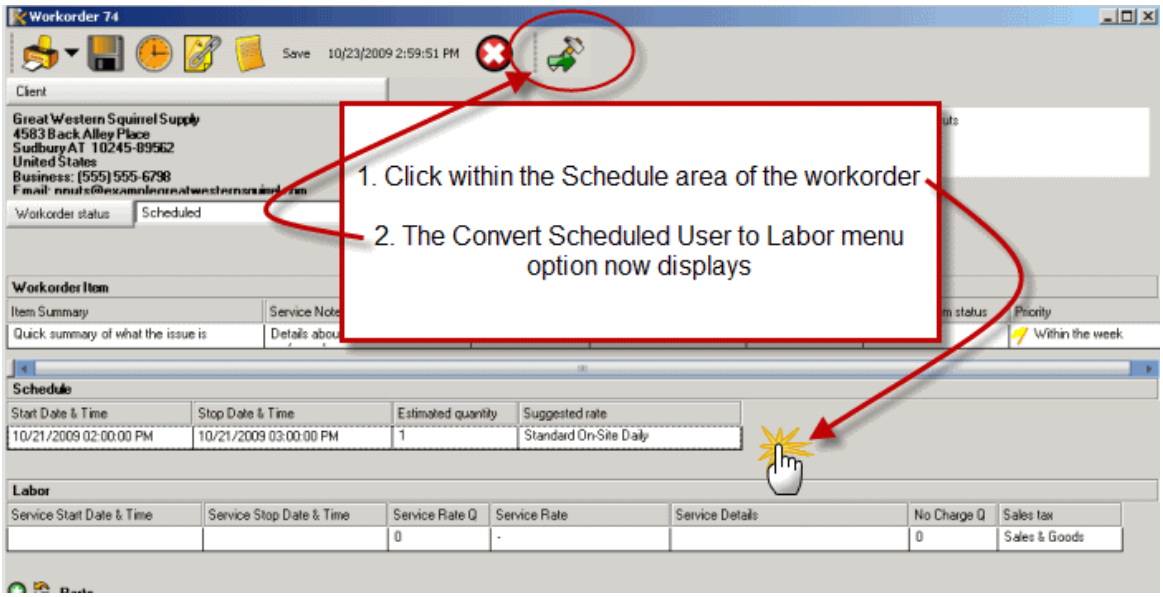
3.17 Convert scheduled items to labor easily

Take advantage of the time saving feature **Convert scheduled user to labor** so you don't have to re-select the start and stop date/time, the user who performed the service and the rate.

1. In the workorder entry screen, click within the Scheduled Users subsection

2. Identify the Scheduled User record you want to convert by selecting its row header

When you do so, you will see that the menu option **Convert scheduled user to labor** now appears



3. Select this menu option, and the start and stop date/time, the user, the rate and the quantity from Scheduled Users will be used to automatically create a Labor record

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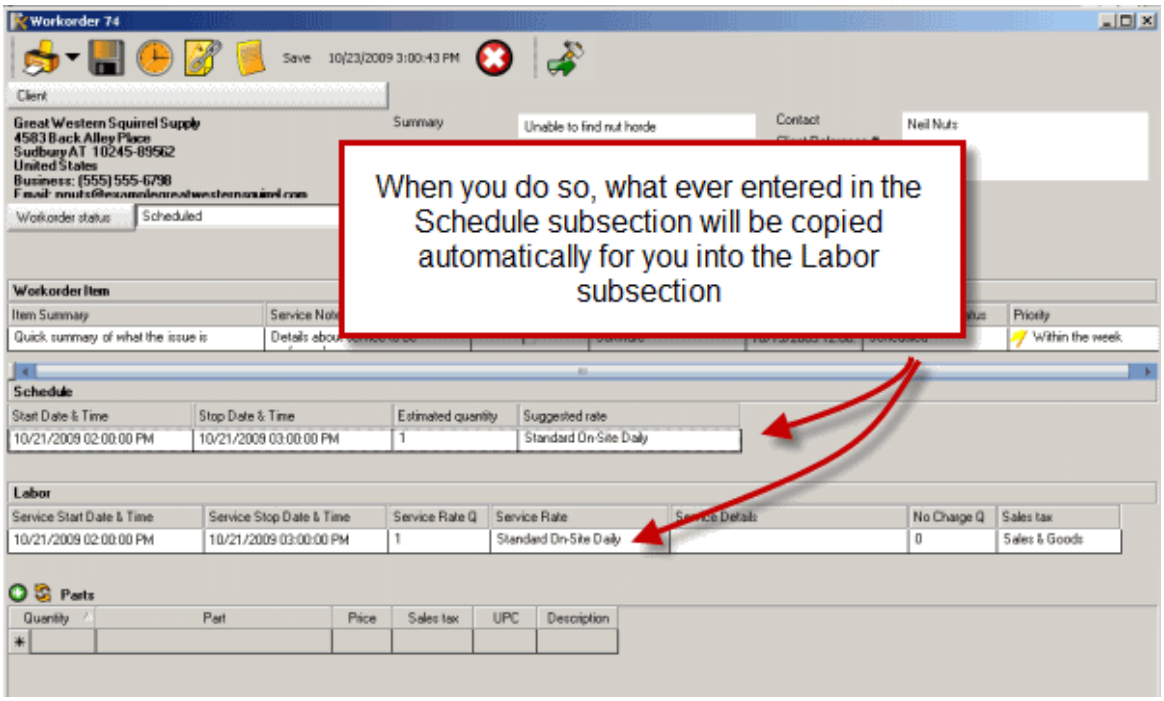

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3.18 Common entry screen menu options

Each entry screen has menu options that are specific for that entry screen's object (i.e. client, part, etc) you are viewing. Do note that not all entry screens have the same menu options. We have listed below menu options that are common to most object entry screens and what each is for.

If a menu option is not showing, that would indicate that entry screen does not have that menu option.

Print

Selecting this menu option drops down to display the list of available reports for the displayed entry screen.

For example, reports available from the Service Workorder grid would not be the same reports available from the Clients grid.

See also:
Printing

Plug-in

If this menu option shows, drop down to display available plug in's for this entry screen.

For example, if you have installed the import/export utilities and are viewing a client's entry screen, this drop down will list the ImportExport.csv plug-in utility for exporting this single client to a CSV file.

See also:
PlugIns

Save & Exit

This menu option saves any changes to this entry screen and closes the entry screen.

Record History

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This opens up the Record History window displaying the user that originally created this object, and date of creation; and the last user that modified this object and date of modification.

Do note that the fields are not updated until the object has been saved and closed. For example, if you have just created a new client, and have not yet selected Save or Save & Exit – the creator and creation date will be blank.

Follow Up

A Follow Up is a Schedule Marker that is tied to a particular object that you want to follow up on at a later date.

Select this menu option to either add a follow up for this object, or view existing follow ups for this object.

Follow Ups are available for Clients and Service Workorders.

See also:
How do I create and view Follow Up in a workorder?

Save

This saves any changes made to the object without closing the entry screen.

Save & New

This saves any changes made to the object and opens a new empty entry screen so that you can create a new object without having to go back to the grid and selecting New...

This is useful if you are entering a number of similar objects (such as parts).

Duplicate

This makes a duplicate of the existing entries of this object and copies them to a new object entry screen.

For example, lets say you are entering a number of parts that are similar other than the pat number and name - just save the first entry, and then select Duplicate. Edit its part number and part name. Save. Select Duplicate. Edit its part number and part name and so on.

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Delete

This deletes the **whole** object. Note that only if you have rights to do so will this toolbar option be available.

Delete is a permanent option. You are given one warning and chance to cancel and there is no "undo" option. If a user ignores the warning and deletes an item they should not have, the only options are to re-enter it from scratch or restore the entire database from a backup copy.

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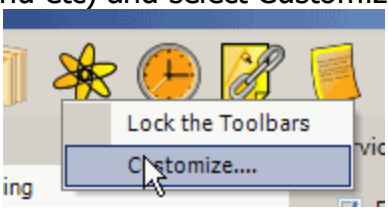
3.19 Changing menu images size (small or large)

Some people like menu options to be big and easy to select.

Some people like menu options to be small and out of the way.

So to accommodate each different person, each AyaNova user can set their menus how they want and AyaNova will save it for that user logged in.

1. Right-click on any of the existing menu options of what you are viewing (i.e. a Part entry screen or the Service Workorders grid menu or the main menu etc) and select Customize....



2. Select the **Options** tab, check or uncheck the **Large Icons on Toolbars** option depending if you want the menu options to be large or small, and then select **Close**

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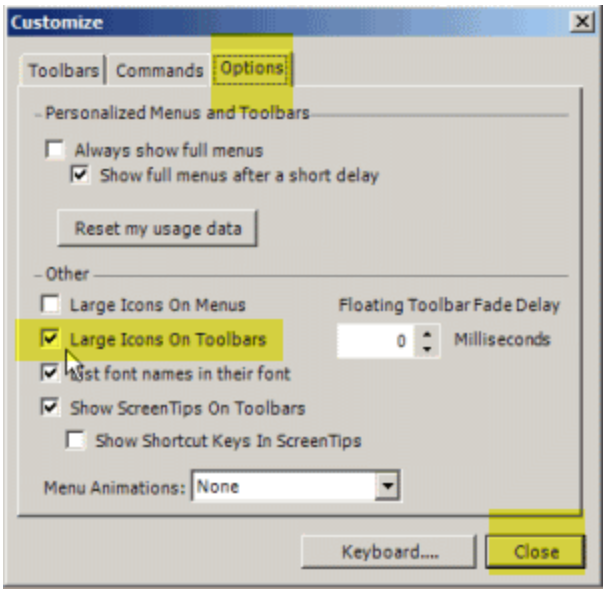

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3.20 Accelerator Keys

In addition to using your mouse to click on selections, AyaNova also provide Accelerator Keys which are key combination from your keyboard to automatically do something in the AyaNova program.

The Accelerator Key's save you time so that you do not have to go to the specific grid to click on the New... menu option to create the new object.

ALT-x

Alt-X **closes the entry screen or the entire AyaNova program** depending on whether you're in a sub-screen or not.

If have just entered new data into an entry screen, you will be prompted to save just as you would if you clicked the menu option Exit or the X in the upper right hand corner.

ALT-w

ALT-w will pop up the client selector so that you can select the client and template (if applicable) for **a new service workorder.**

Or if you are presently viewing the Client's entry screen, or a Unit screen, this key combination will start a new workorder with that client or that unit pre-selected

ALT-p

This Accelerator Key combination works from main grid only to **create a new part**.

In all cases of using Accelerator keys from sub forms like client and unit, if the client or unit is newly created and not saved, or the user does not have sufficient security group rights then the Accelerator keys do nothing with the exception of ALT-x

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Feature Details

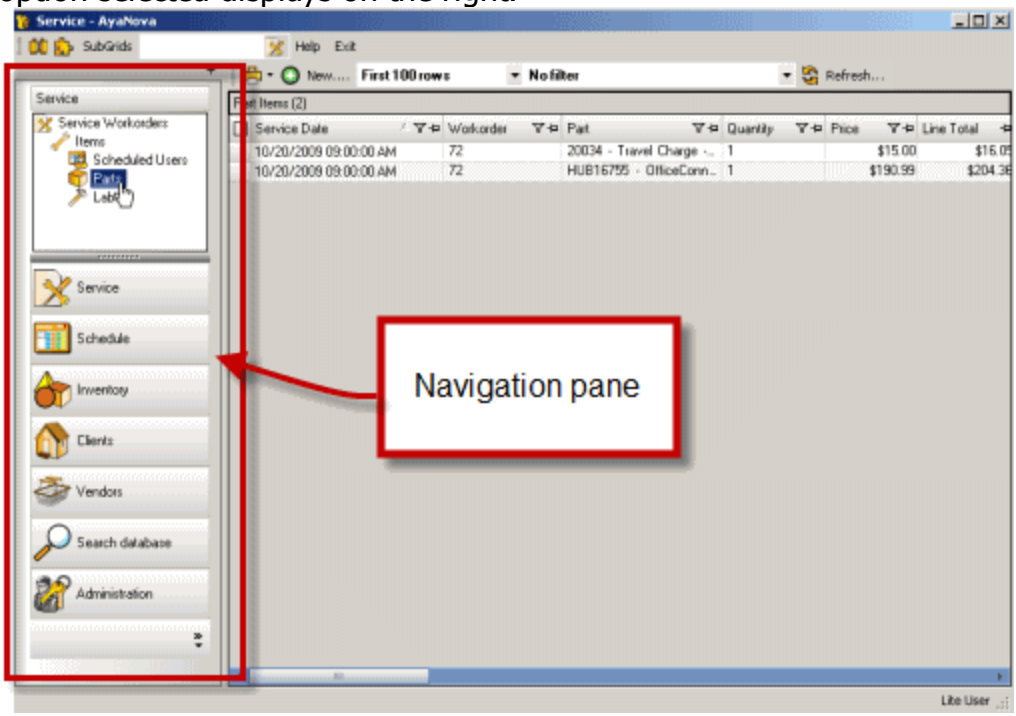
4 Feature Details

4.1 Navigation Pane

4.1.1 Navigation Pane overview

Major grids and screens in AyaNova are accessed via the **Navigation Pane**.

The AyaNova Navigation Pane is on the left side when you run AyaNovaLite and the option selected displays on the right.



- In the screen shot above, you are viewing the **Service navigation pane** with **Parts grid** option selected that shows parts used in service workorders.
- When you exit out of the AyaNovaLite program, AyaNovaLite will "remember" what you were last viewing, and when you next run AyaNovaLite, will open to that same view.

4.1.2 Setting the Navigation Pane order

You can change the Navigation Pane order - for example, you may want to move the Vendors navigation bar to the bottom of the navigation pane:

1. The Navigation Pane is presently displaying the Vendors between Units and the user who is logged in
2. Select the configure button at the bottom of the Navigation Pane

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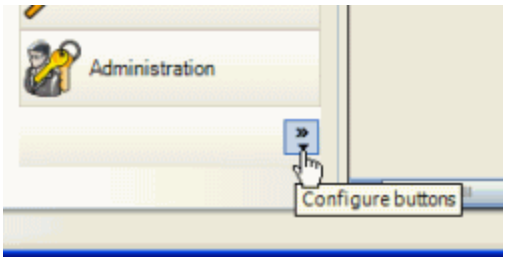
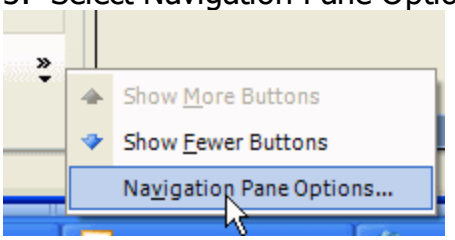
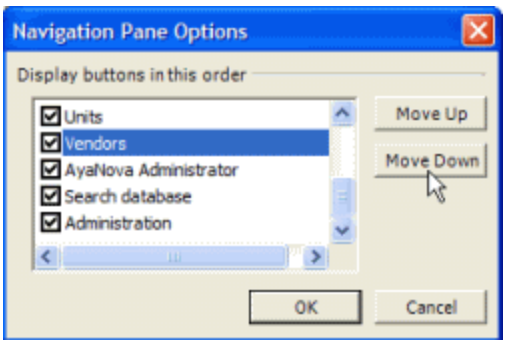
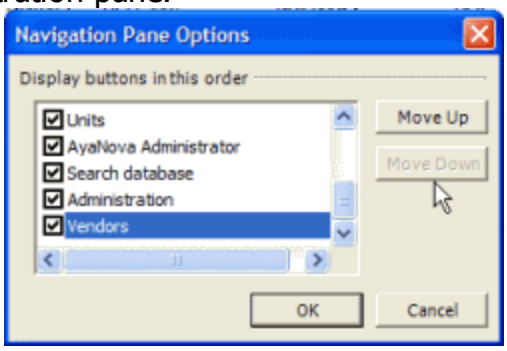


3. Select Navigation Pane Options



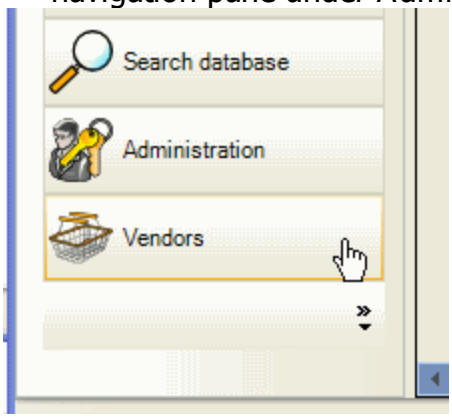
4. Select the Vendor pane which is what you want to move, and select Move Down till it is below the Administration pane.





5. Click on OK to save the Navigation pane options

6. The navigation pane will now display the Vendors bar at the bottom of the navigation pane under Administration



These settings will display the next time you run AyaNovaLite as it maintains this information within its database for you as a user.

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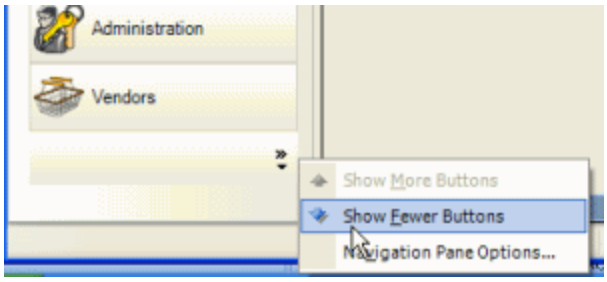
4.1.3 Setting the Navigation Pane display

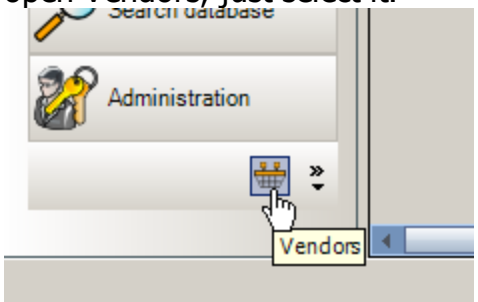
Use the Configure Buttons of the navigation pane to move the bar so that it no longer shows when you log in, and instead shows as a quick link image.

For example, you do not want the Vendors bar to show on the navigation pane for visual reasons:

- First use the steps to move the Vendors pane to the bottom of the order.
- Now select the Configure Buttons at the bottom of the Navigation Pane and select Show Fewer Buttons



- It will move the bottom pane as an icon only to the very bottom. To open Vendors, just select it.



These settings will display the next time you log in as AyaNova maintains this information within its database for you as a user.

4.1.4 Pin, hide and dock the Navigation Pane

You can pin, hide and dock the Navigation Pane so that more space in main grids and the Schedule screen is freed up.

- Unpin the Navigation Pane by clicking on the Pinned symbol

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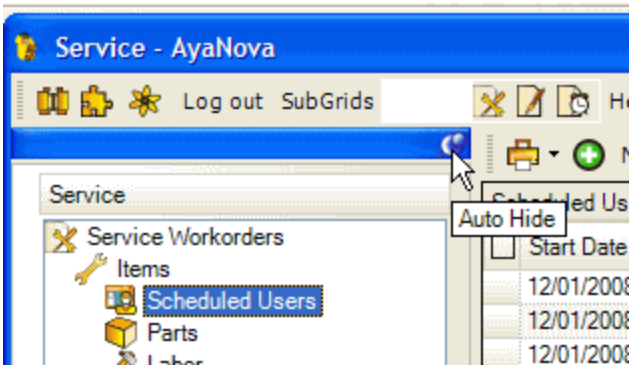
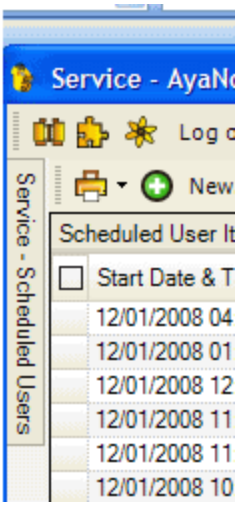


- When you do that, the Navigation Pane will automatically move to the left out of your way while still showing what grid you have selected in what navigation pane.



- Any time you want to bring the Navigation Pane back over, just hover your mouse over the tab for the Navigation Pane

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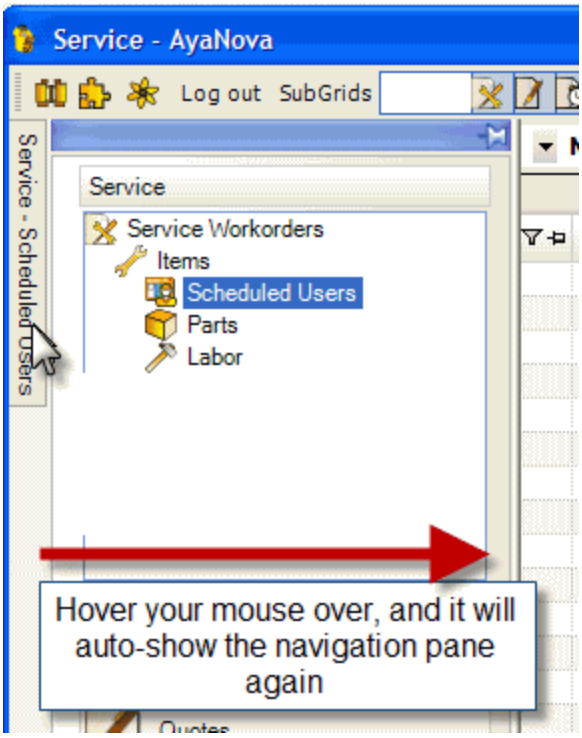
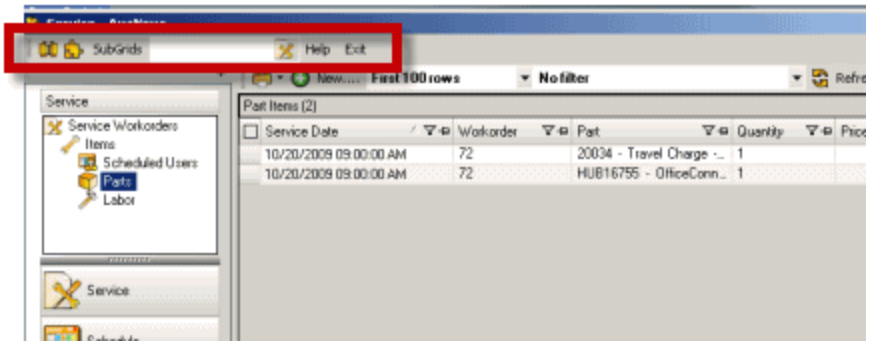


- You can also drag the navigation pane to dock at the bottom or the top as well as off the AyaNova screen.
- Do note that when you exit out of AyaNova and log back in, the navigation pane will be back to pinned and on the left hand side - so if you drag it off somewhere and can't get it to sit right, just exit and log back in.

4.1.5 Main AyaNova Menu Bar

The main AyaNova menu bar appears at the top



You can use the main menu bar options to list your recently accessed objects, plugins, open up the Global Wiki page, quickly log out of AyaNova, access the sub-

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grids within AyaNova, and quickly open a workorder, pm or quote by entering its number, access web information regarding AyaNova, check your AyaNova version, and also use the main menu bar to exit out of AyaNova.

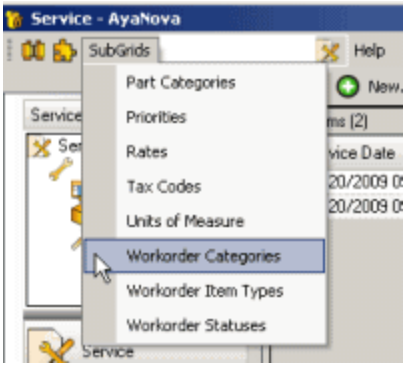
Recent....
Useful to see the last objects you opened - for example, you just check marked Service Completed which has to close the workorder entry screen to apply the features, you can easily just drop down the Recent... to see the list of last viewed object and select that workorder to re-open it.

PlugIns
If any plug-ins are installed, then this menu option will show, such as QBI (QuickBooks interface), PTI (Peachtree interface), import/export CSV utilities.

See also: PlugIns

Log out ***Log Out***
Selecting this will bring up the AyaNova login screen without having to close down the AyaNova program. This is useful if multiple users share the same computer so any entries performed by each user are identified in Record History by their username.

Note as with all text labels in AyaNova, depending on your locale, this may display with different text. Refer to the Localization Text Designer section for additional details.



SubGrids
Will open up the entry grids where the following items are created, viewed and edited. Note all are optional use.

Part Categories – used to group parts together. If you use Part Categories, you may want to set the Global Settings part name format to display drop down selection lists with the category name listed first. A Part Category is selectable in the Part entry screen.

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Priorities - signifies how important a workorder item is, or how urgent a workorder item may be. When viewing the Schedule screen, a workorder item will display a colored flag with the selected color of the priority for the workorder item. Priority also displays on the Scheduled List Grid as its selected color.

Rates - used to indicate charges for labor and travel on workorders to the customer and as summarized data on various reports. You can add as many rates as desired.

Tax Codes – used to indicate taxes to be charged on parts, expenses, and service and travel rates.

Units of Measure – used to indicate the determinate or magnitude of the part designated. This displays within where a part is selected when entry quantity to specify the type of measure. For example, a part could be "each", "box", "case", "dozen", "gallon", "feet", "meter" etc.

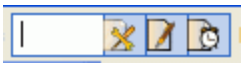
Workorder Categories – used to group workorders together by selecting within the service workorder, quote or pm. This is useful for filtering grids and reporting purposes.

Workorder Item Types – used to group workorder items together within a service workorder, quote or pm. This is useful for filtering grids and reporting purposes.

Workorder Statuses – used to determine the progress of a work order as a whole, or the status of an individual workorder item. Status selected within workorder items will display their associated color when viewed in the Schedule screen. Status selected for the workorder as a whole does not affect the color displayed in the Schedule screen, as the Schedule screen displays workorder items associated with a scheduled user only.

For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item's status.

We provide both here for you so that you can use what works best for your organization and company. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas. Use of Workorder Statuses is optional in AyaNova.



"Direct Open" feature

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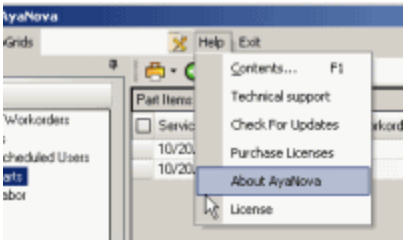
This feature provides the ability to open a service workorder, a quote or a preventive maintenance order by entering in its number and pressing the corresponding button.

For example, without having to go to the Preventive Maintenance grid, you can just enter in the PM# in this field and select the PM image



Help

Contents... – Opens this online Help

Technical Support – opens your web browser to the AyaNova Support Forum

Check for updates – checks online to see if your AyaNovaLite is the latest version. If not, will open to a web page for details on updating to the latest version.

Purchase licenses – opens your web browsers to the AyaNova web site Purchase page

About AyaNova – identifies your AyaNova program version, database server in use, location of database, registered to, and other technical information.

Trial - Toggle To AyaNova - If have licensed AyaNovaLite, this will not show.

License – Only displays if logged in as the AyaNova Administrator or a user that is a member of the AyaNova Administrator security group

Opens up screen from where you can:
- enter your Activation Key to license your AyaNova
- fetch your Activation Key to license your AyaNova
- delete all existing data

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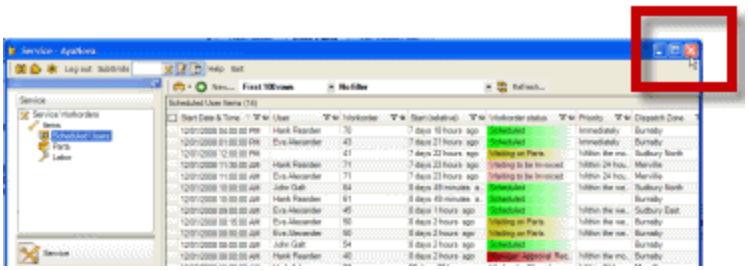
Exit

This exits out of AyaNova, closing the AyaNova program.

You can also select the X in the right hand corner to close AyaNova.



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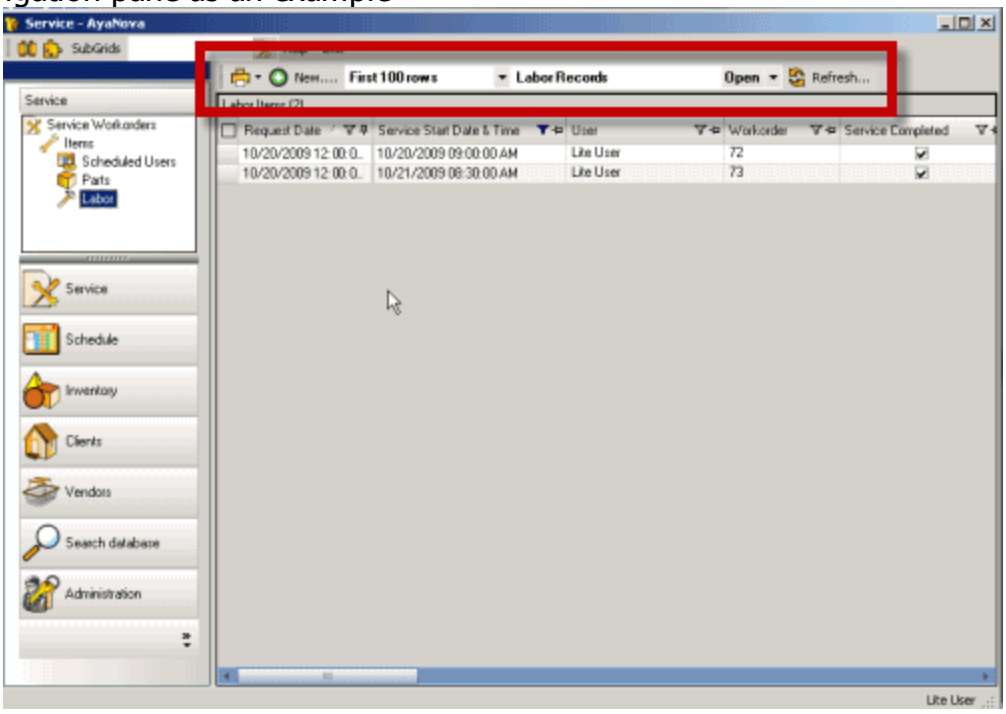
4.2 Grids

4.2.1 Grid menu options

The main grids in AyaNova have menu options available just overtop of the grid that are specific to that grid.

The screenshot below shows the grid menu options for the Parts grid in the Service navigation pane as an example



These include the Print selection, the New... selection to create a new grid object, the maximum number of records to display in the grid, the Filter Drop List, and the Refresh button.

Print

Selecting the Print icon menu option from a main grid allows selection of a report template to print the displaying data for **that** grid.

For example, if you were viewing the Service Workorders grid, and you had filtered to show only service workorders that are set to Service Completed, then only those workorders displaying in the grid would print their data on any report you select.

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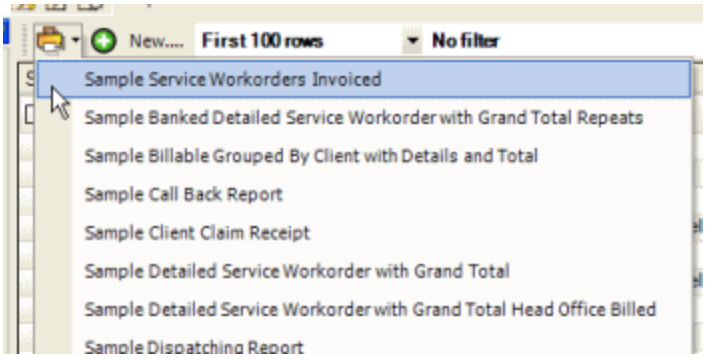
Do note you may or may not see the same reports shown in screenshots in this manual. Additional sample report templates can be downloaded from the AyaNova Support Forum http://forum.ayanova.com , or you may customize your own, and/or may contract a consultant to create specialty report templates.



New summary report and *New detailed report* are selected to create new custom reports from scratch. The *New summary report* provides access to all fields displaying in the grid, whereas if a *New detailed report* is displayed, additional fields not displaying in the grid may also be available for selection in a custom report template.

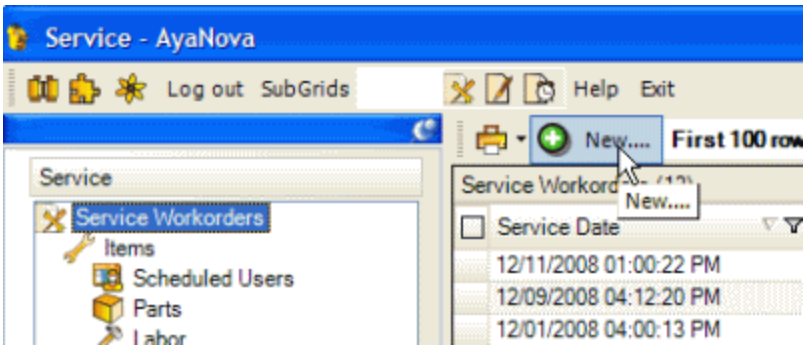
See also:
Creating a new report template

New...

This menu option is to be selected to create a new object for the grid you are presently viewing.

For example:

To create a new service workorder, view the Service Workorders navigation pane grid and select the menu option New… which will begin the process of creating a new service workorder. Additional details in this manual's section "Service Workorders"



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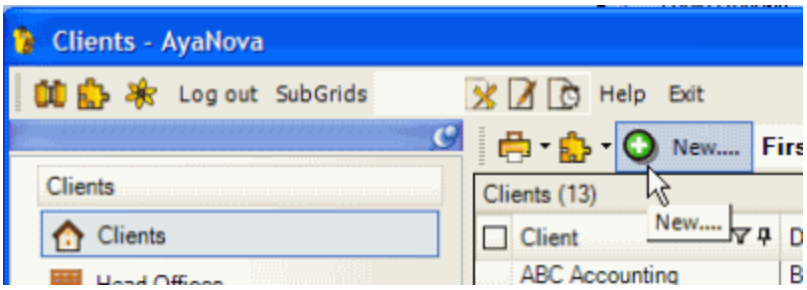
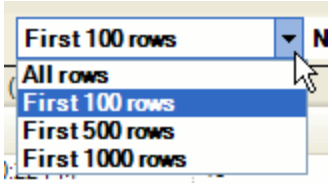
To create a new client, view the Clients navigation pane grid and select the menu option New… which will open an empty client entry screen. Additional details in the manuals section "Clients"





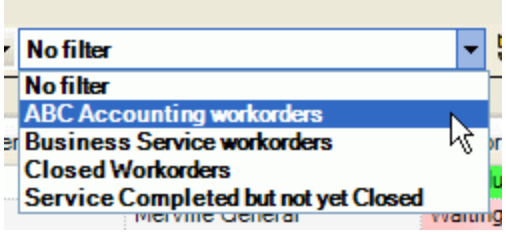
Maximum number of records to display

By default the grid will display up to a maximum of 100 records regardless of the total number of records the grid would display based on the sort order and filters used.

For example, let's say you are viewing the Service Workorders grid – even if you had entered 600 workorders, by default only the first 100 based on the sort order and filter of the grid would display.

This is to maximize speed to display the grid.

If you want to see **all** records, regardless of the time it takes to display, then drop down and select All Records – or if you want to see the first 500 that meet the sort and filter order, select 500 Records – etc.



Filter Drop List

The Filter Drop List is where you can select to use no filter, or select a previously saved filter, or save a filter just created.

Save the filters you most likely use on a regular basis for future quick selection from the Filter Drop List instead of having to recreate the filter again.

See also:

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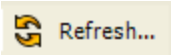
Filtering a grid
Using the Filter Drop List



Refresh...

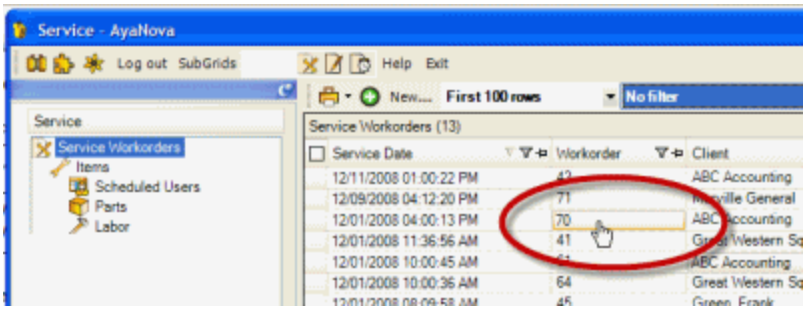
This is to refresh the grid to display recently entered data. AyaNova will automatically refresh all main grids approximately every 5 minutes but use this if you want to refresh immediately.

4.2.2 Accessing data displayed in main grids

Data displaying in main grids is **not** editable directly from these grids.

- Instead, open the entry screen to edit the record.

  For example, click on the Workorder # in the grid to **open** that service workorder entry screen and make any changes needed.

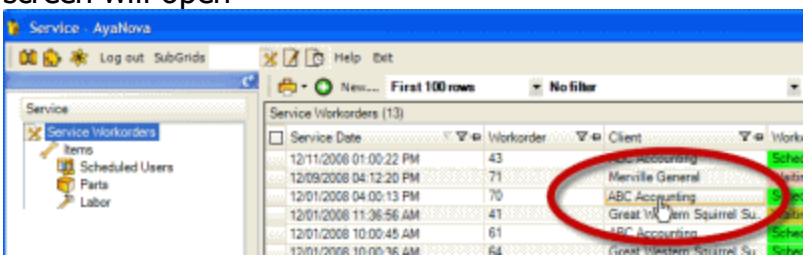


  When you save it, you will be returned to the grid from where you opened it, and any changes you made will now show in your grid.

- You can also open the entry screen for many different objects in AyaNova from different grids.

  Examples:

  From the Service Workorders grid, click on the client's name and the Client's entry screen will open



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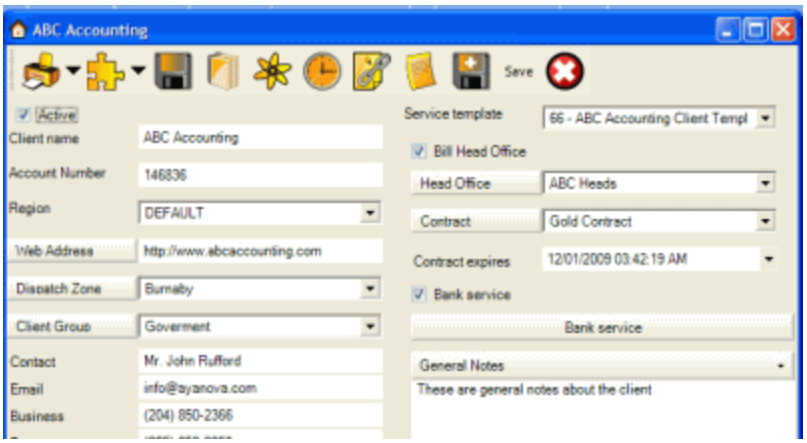
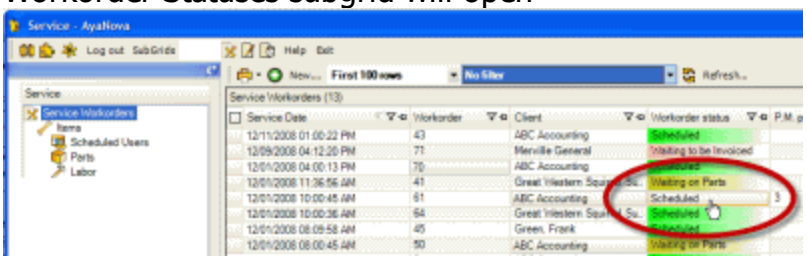
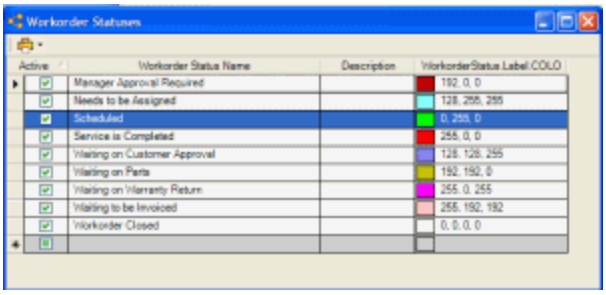


From the Service Workorders grid, click on the a Workorder Status, and the Workorder Statuses subgrid will open





4.2.3 Filtering a grid

You would filter a grid to restrict what records display for reporting, filter so that you can easily find data or filter to speed up the retrieval of data from the database.

For example you might filter on the Invoice Number column to only show workorders that have this field blank - so that you can see at a glance which workorders still need to be invoiced out.

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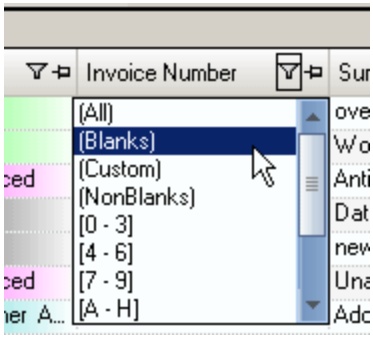
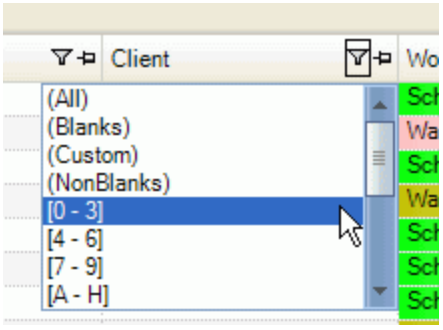


- Filtering can be via one column or multiple columns in one grid.
- A clear on the column header indicates no filtering by this column is occurring.
- A colored on the column header indicates that filtering by this column is occurring.
- You will note that the Filter Drop List will show **No Filter** in the Filter Drop List if a filter is not set, or it is in the middle of a filter not yet saved or if you are presently viewing a previously saved filter
- Click on the object in the column heading to drop down a selection list of what to filter by. There are many choices depending on the type of data the column lists.



- You could select <ALL> to set no filtering, or depending on the type of data displaying in that column possibly [A – H] to display only data that begins with the letters A through H, and so on, or scroll further down to select a specific already displayed data to filter by.
- It is suggested that you try different scenarios till you get the results you need. You can always return to (ALL) or any other filtering easily.

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See also:
How do I filter a grid and print a report for the records that show?
How do I create a custom filter?
Using the Filter Drop List
Listing all workorders for a specific client

The last viewed filter(s), sort order, pinning and navigation pane grid showing when you as an AyaNova user exited out will be the filter and navigation pane grid showing when you next log in.

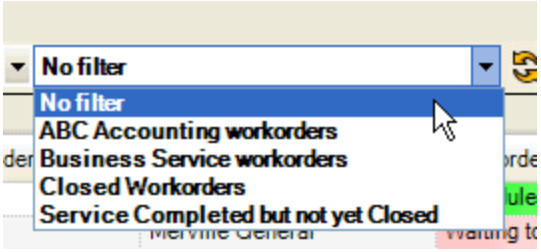
For example, if you are a schedulable user, you may always want to initially view the Scheduled Users grid but filtered by your owned name to only show workorder items where you are scheduled.

If the username you use is used by multiple users, do note that if that username is logged in multiple times, any filtering you set may be overwritten by others also logged in under that same username.

For this reason, it is recommended to have every user log in under an individual username.

4.2.4 Using the Filter Drop List

With the Filter Drop List you can:
- Display with no filters
- Save a filter
- Select a previously viewed filter
- Edit a previously saved filter

To display with no filters
- Drop down the Filter Drop List and select **No Filter**
- 

To save a filter in the Filter Drop List
- Filter the desired column(s)
- You will note as soon as you set any new filters, the Filter Drop List displays as Unsaved filter with a Save button.

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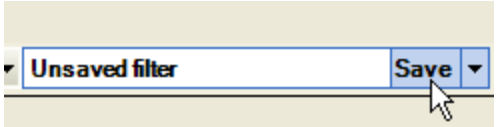
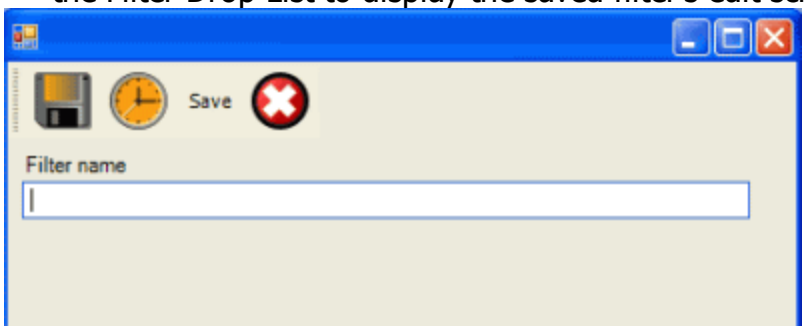


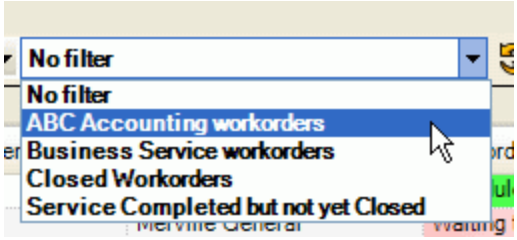
- When you are finished with the filter settings, click on the Save button in the Filter Drop List to display the saved filter's edit screen



- Enter in the Name desired for the saved filter and select what users have access.
- Select Save & Exit
- The Filter Drop List will now display that filter as selected in the list

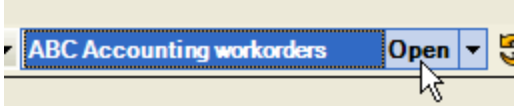
To select a previously saved filter

- Drop down the Filter Drop List and select the saved filter by its name



To edit a previously saved filter

- Drop down the Filter Drop List and select the saved filter by its name
- Select **Open** button in the Filter Drop List to display the saved filter's edit screen



- Edit as needed
- Select Save & Exit

To delete a previously saved filter

- Edit the previously saved filter
- Select the Delete menu option

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Saved filters save only the filter settings. The sort order, sizing and pinning of the grid is an individual user setting.

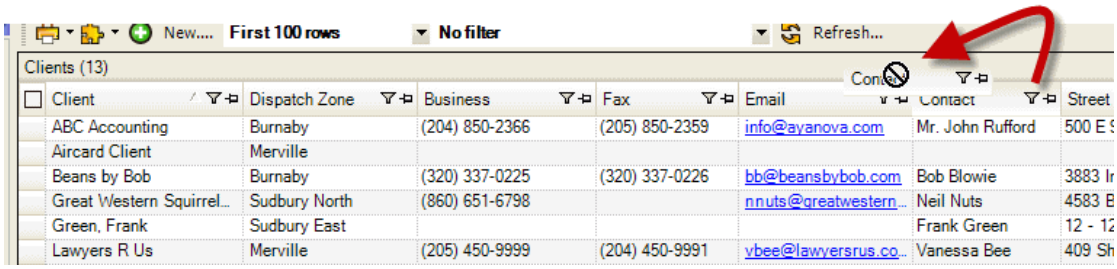
4.2.5 Moving and sorting columns in a grid

When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including the order of columns.

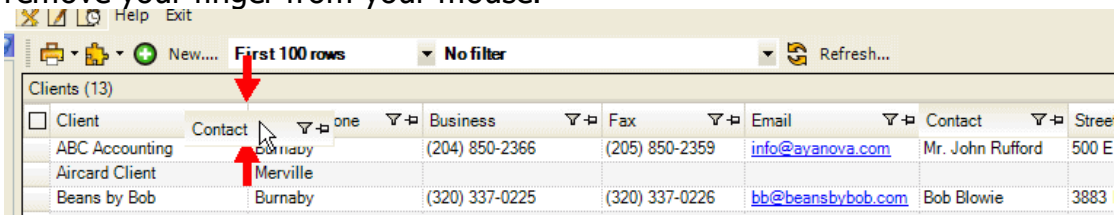
Moving the order of columns:

The first 4 columns in grid denote the sort order.

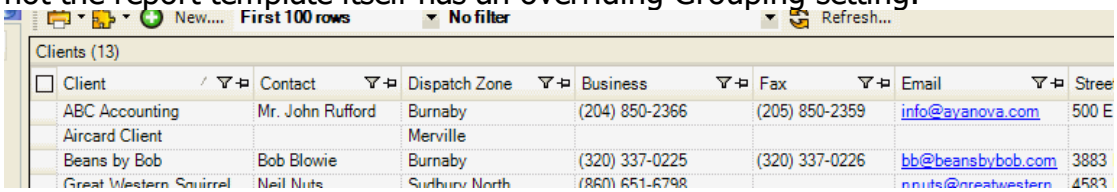
All grids can have their columns rearranged. Use your mouse to click and hold the column header and then drag to the new location
See how the column header appears to be moving



Red arrows indicate the location where it will be placed if you "drop" or remove your finger from your mouse.



Sort order also affects how some reports print out dependant on whether or not the report template itself has an overriding Grouping setting.



Setting the Ascending / Descending column (sorting):

Most grids include the ability to set ascending/descending aspect of the **first** column.

^ indicates Ascending – numbers listed first, then A, B and so on in order

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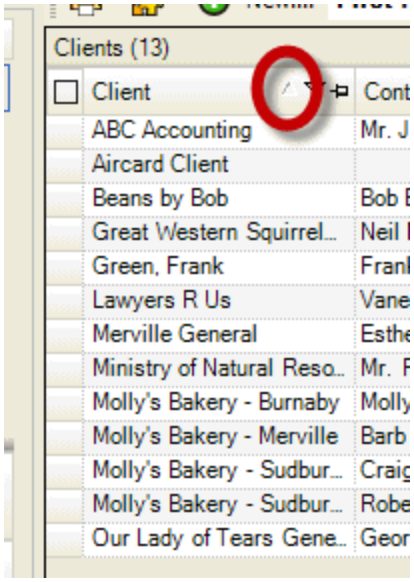
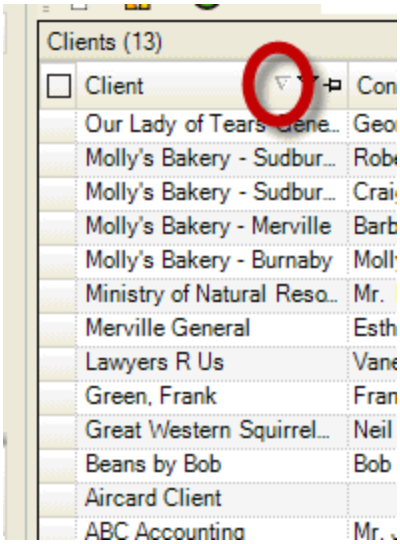
Descending order – Z listed first, then Y and so on in reverse order

Easy way I like to think of it is – when its an "upside down triangle" the biggest part of the triangle is at the top – therefore largest numbers are at the top if sorting by numbers; if sorting by letters, Z is listed first and so on

Ascending



Descending



Do note that the following columns in grids (*which are based on a number of fields – i.e. Part may be Part Name – Number – Part Category*) sort by one specific field, regardless of how they are set to display in the Global Settings

Part – will always sort by the Part Number

User – will always sort by the Last Name

You can change which is the first column of every grid by moving the column as per the previous section "Moving the order of columns"

The sort order is dependant on the database server used.

If a main grid does not display the Ascending/Descending image on the first column – just click on the first column header to make it show up.

If the sort image does not appear, then you know that the grid does not use sort.

By default, the Firebird server (whether using the default stand-alone embedded or the network Firebird configuration) uses ASCII-Sort order.

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The ASCII (American Standard Code for Information Interchange) guidelines are followed. This means internationally accepted standards for character values are used when determining sort order when using Firebird database server.

When you sort the client grid, for example, that the customer name Baker displays before the customer name baker, since B precedes b in ASCII sort order.

The SQL Server (and the free SQL Express) sort alphabetically without taking into consideration case.

The following chart lists characters in ascending order used by Firebird. Reverse the order to display in descending order.

space	8	P	h
!	9	Q	i
"	:	R	j
#	;	S	k
$	<	T	l
%	=	U	m
&	>	V	n
'(apostrophe)	?	W	o
(	@	X	p
)	A	Y	q
*	B	Z	r
+	C	[	s
,(comma)	D	\	t
-(dash)	E	]	u
.(period)	F	^	v
/	G	_(underline)	w
0	H	`(tickmark)	x
1	I	a	y
2	J	b	z
3	K	c	}
4	L	d	|
5	M	e	{
6	N	f	~
7	O	g	DEL

4.2.6 Pinning a column

Pinning a column (or columns) in a grid is useful if the grid has a large number of columns, and you want to scroll sideways to view the info, but maintain which main info this is for.

For example, in Client grid, pin the Client column by clicking on the to set it to the pinned state as denoted by the symbol

If you now scroll to the right, the Client column remains visible.

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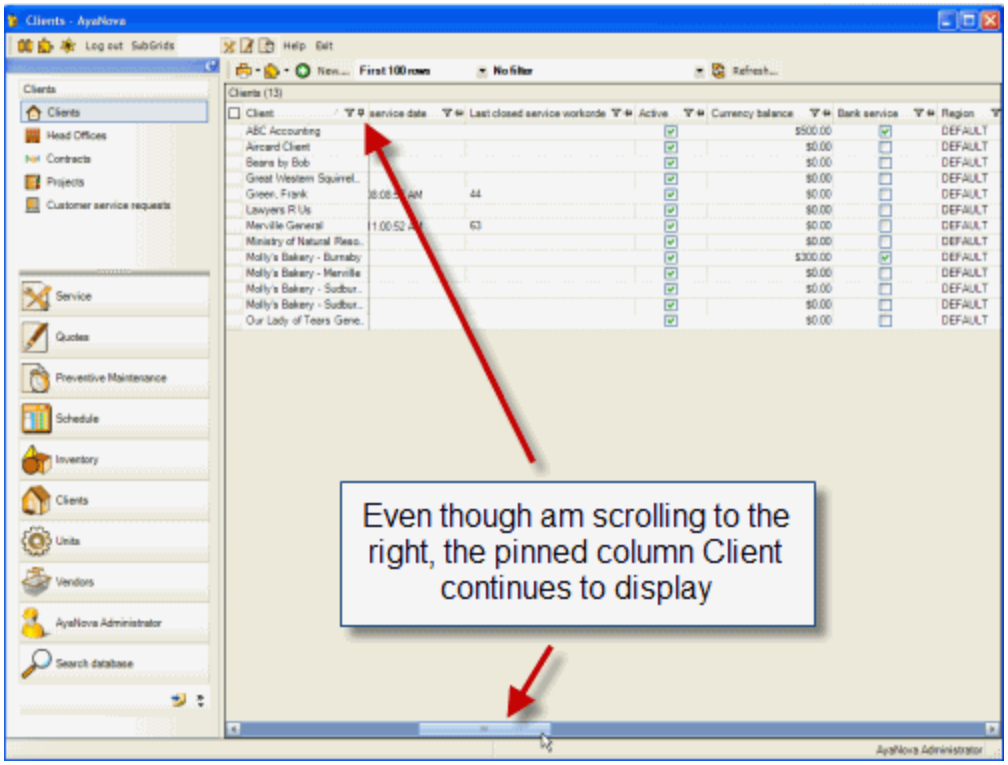
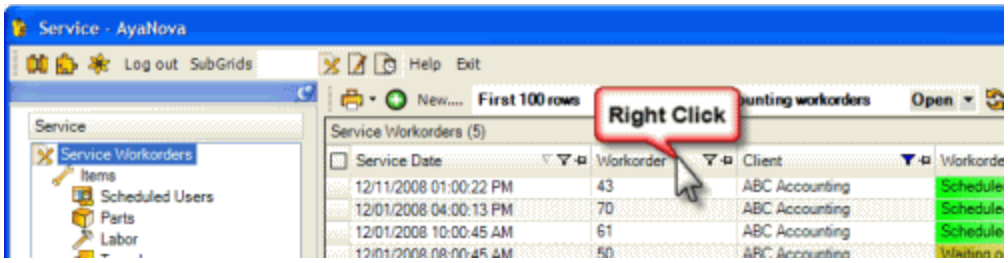


- When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including what columns are pinned.
- A pinned column always automatically moves itself to the far left of the grid and remains viewable no matter how far you scroll to the right.

4.2.7 Setting what columns display in a grid

Setting what columns display in a grid is useful if the grid has a large number of columns and you don't want all of them to show so that you can easily view the data you do want to see.

- Most grids include the ability to set what columns do and do not display.
- Place your mouse over any of the column headings and right-click to bring up the column selection screen.



- This will bring up that grids column display selection window

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- Column labels with a checkmark will display, whereas column labels without a checkmark will not display in that grid
- If you right-click on a grids column headings, and nothing happens, that means that grid is not editable in what columns can show and not show.

When you exit out of the AyaNova program, AyaNova will "remember" the grid settings of any screens viewed including what columns you have set to display in a grid.

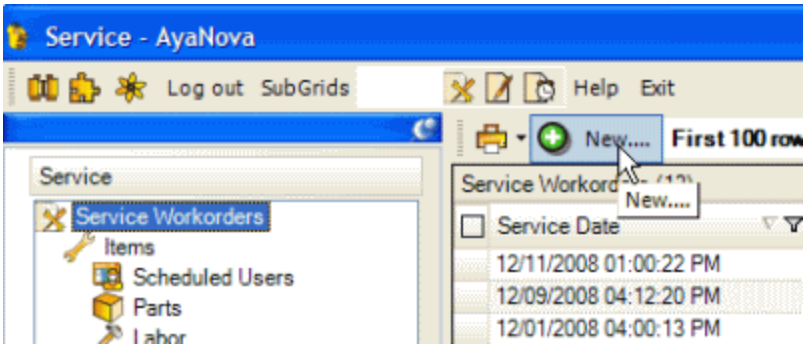
4.2.8 Adding, editing and deleting data for display in a main grid

Main grid screens in AyaNova are those accessible from the main navigation pane of the AyaNova program such as the Clients grid, Service Workorder grid and so on.

To add new data for main grid screens, you will find a

New… button at the top of the grid you are viewing.

Example: To create a new service workorder (note you are displaying the Service navigation pane)



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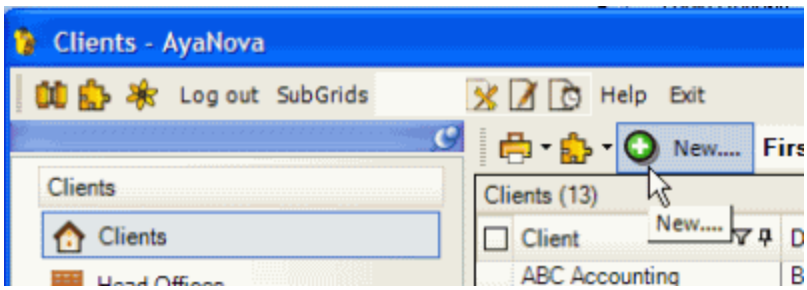
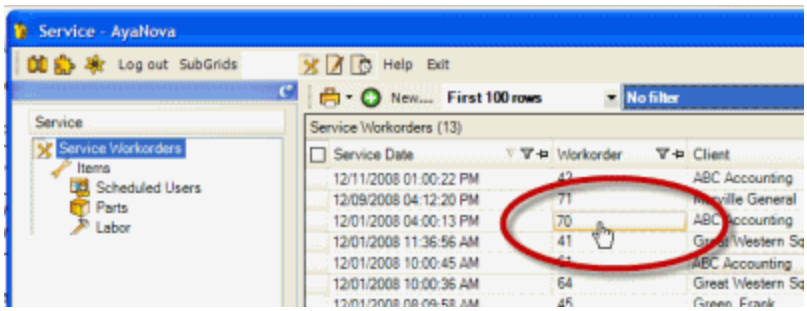
Example: To create a new client (note you are viewing the Clients grid)



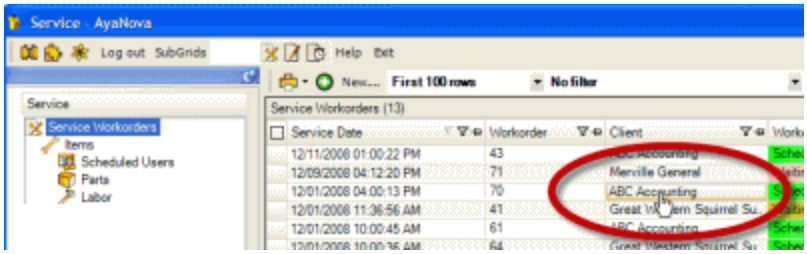
If new data has been entered by someone else that would display in the grid, select the Refresh... Refresh… to refresh the grid screen or AyaNova will automatically refresh the display for you every 5 minutes.

To edit to an existing record, select to open that objects entry screen record.

Example: To open an existing service workorder



Example: To open an existing client



4.2.9 Adding, editing and deleting data for display in a subgrid

Subgrid tables_

- are those listed under the main AyaNova menu option SubGrids where you access Rates, Dispatch Zones etc.

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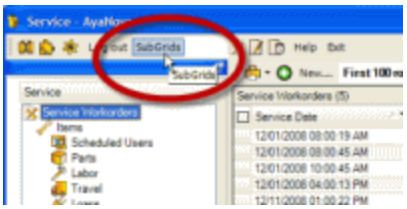
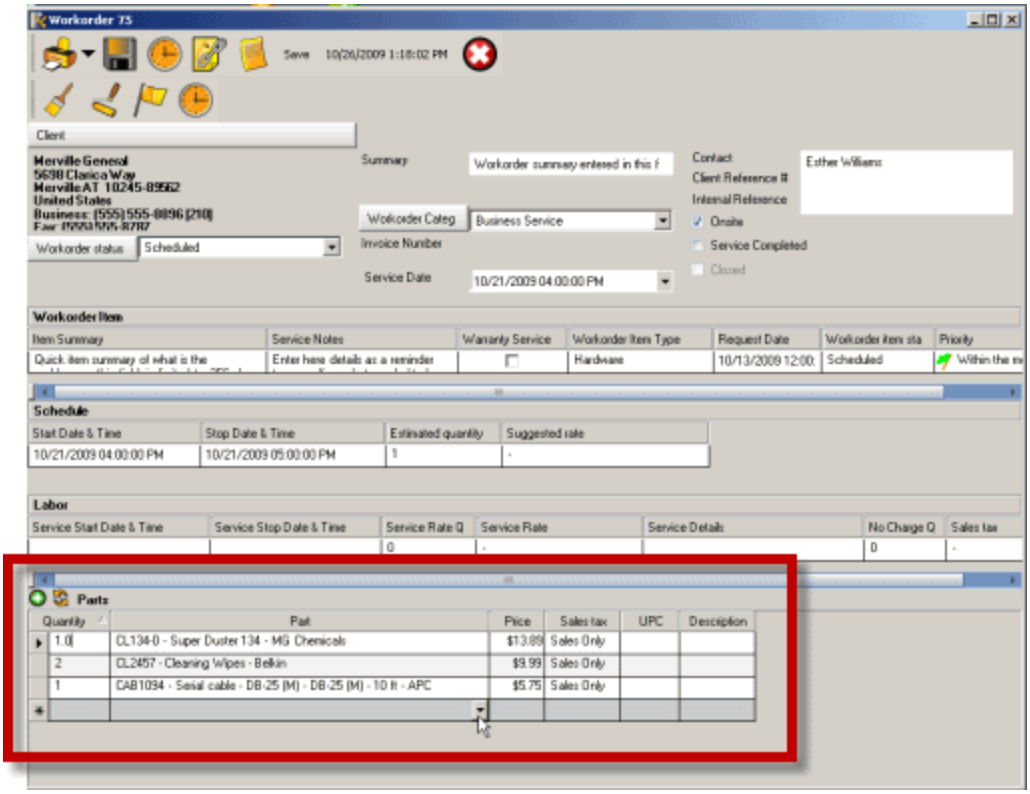
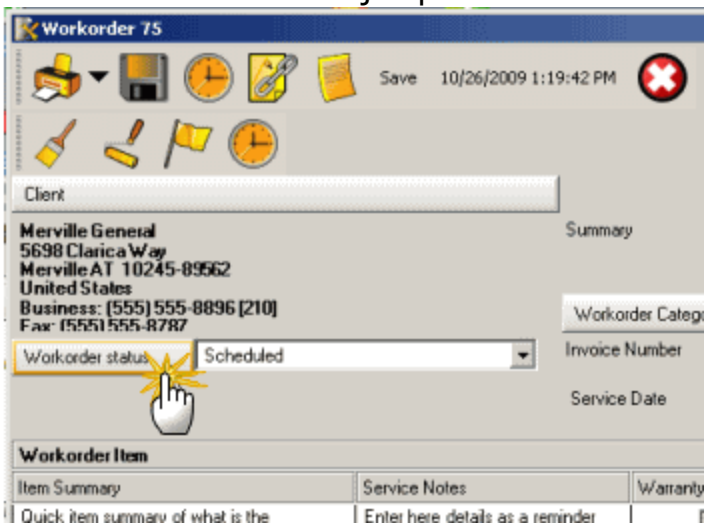


- are also those subgrids within an entry screen such as the Parts subsection of a workorder



- are also accessible from jump buttons within entry screens



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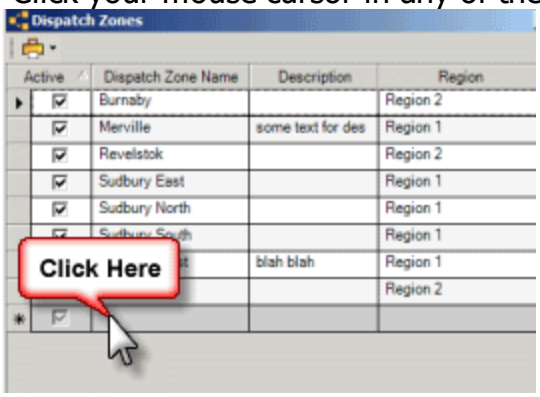
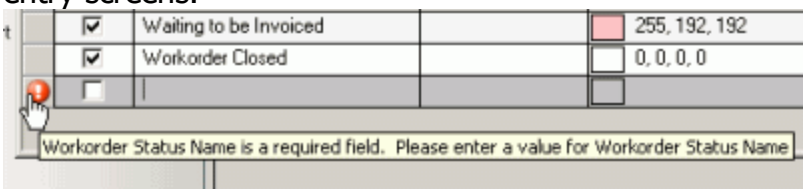
To add new data into a subgrid table:

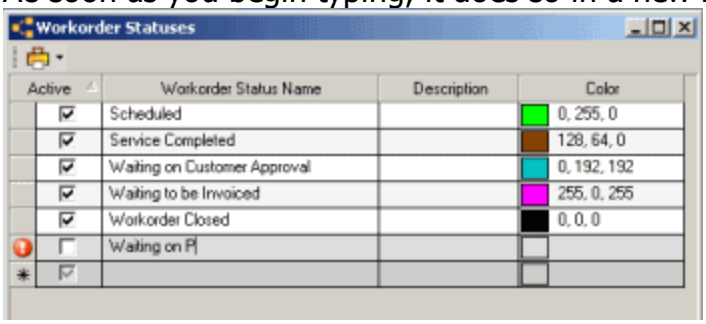
Click your mouse cursor in any of the columns in the grayed row.



This begins a new row that you can enter data in. You may also note the red exclamation mark which reminds you of required fields – in the screen shot below, Name is a required field so that the Dispatch Zone can be selected within entry screens.



As soon as you begin typing, it does so in a new row.



To edit an existing row of data

just place your mouse in the column field that you want to edit and do so.

Two ways to delete an existing row of data

1. Select the Delete row option

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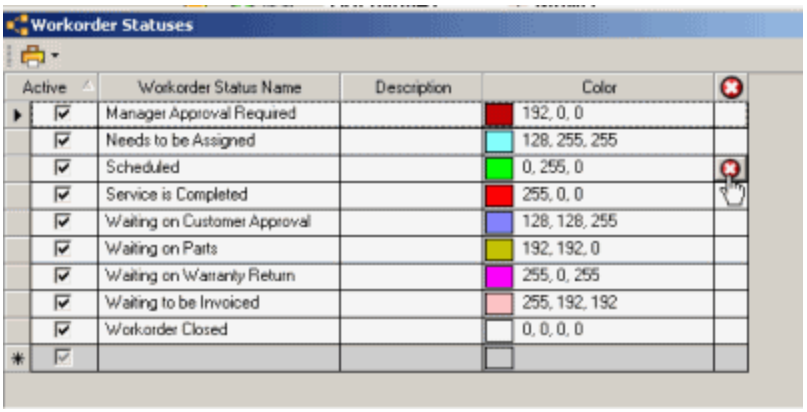
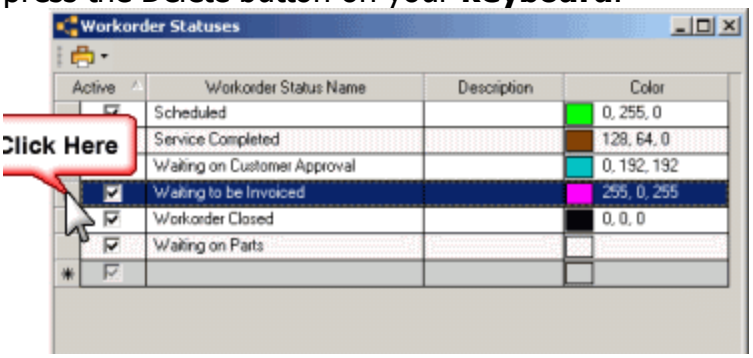


2. Click your mouse on the row header which will highlight the entire row then press the Delete button on your **keyboard**.



If the row of data has been linked elsewhere in the database, you may not be able to delete that record.

Do note that some grid tables, once a row is entered, cannot be deleted even if it appears to have not yet been selected elsewhere – such as Tax Codes, Part Warehouses. If you do not want this item selected, uncheck the **Active** field for that item.

To set an existing row of data to inactive

Just uncheck the Active field for that record row, and exit out of the subgrid to save.

The screenshot below shows that the Dispatch Zone Sudbury South is inactive, and as a result will not be displayed in an selection lists elsewhere in AyaNova.

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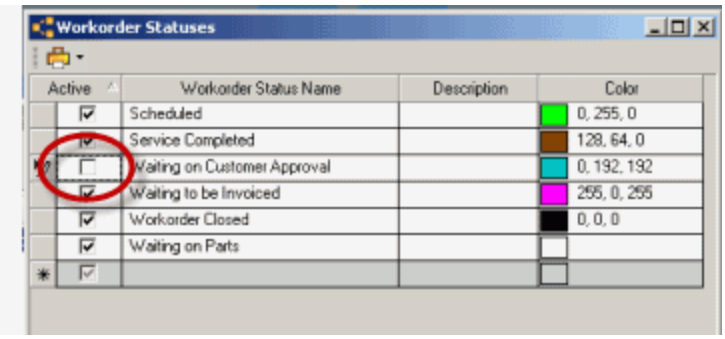
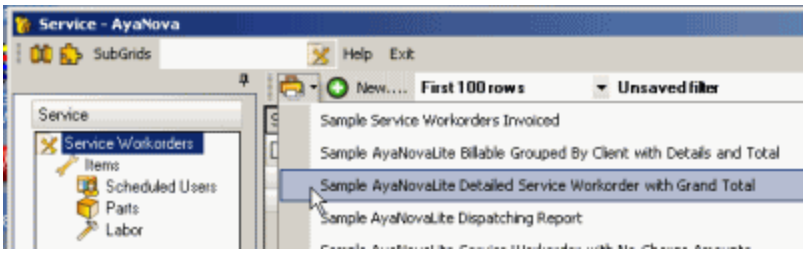


4.2.10 Printing from a grid



To print from a grid:

1. First filter, sort, and/or specify what records you want to print
2. Then select the Print option for that grid
3. Which drops down the list of available report templates for that grid.

See also:
[Filtering a grid]
[Moving and sorting columns in a grid]
[How do I filter a grid and print a report for the records that show?]
[Printing -> Printing from a grid]

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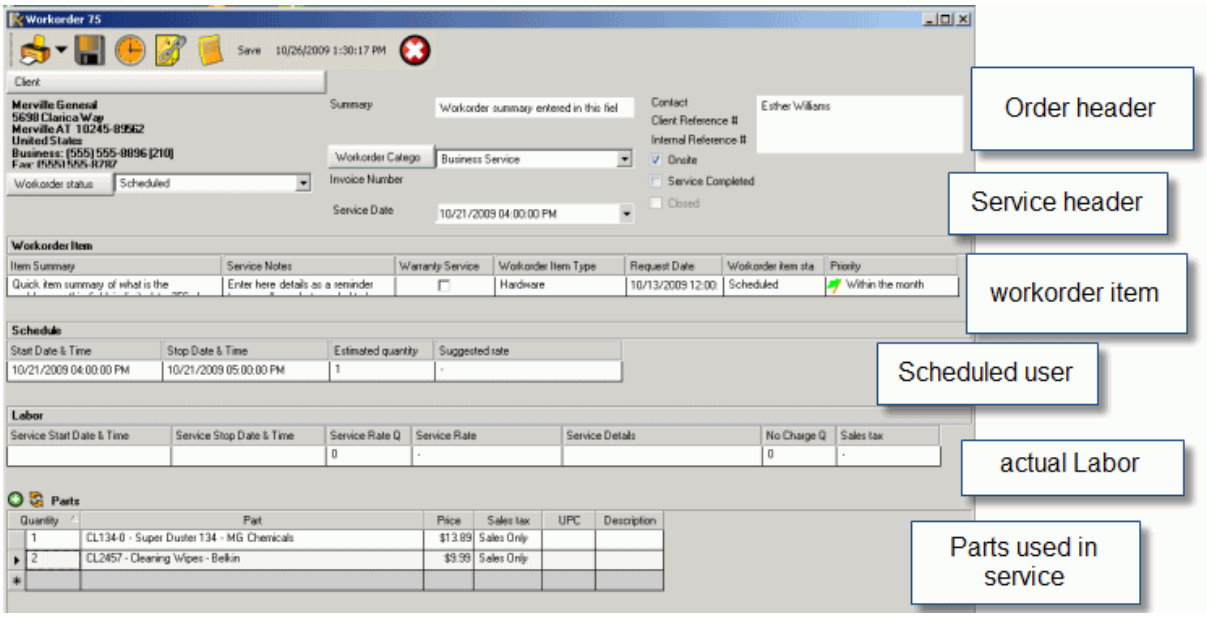
4.3 Service Workorders

4.3.1 What do I use a service workorder for?



Use AyaNova service workorders to:

- identify which client the order is for, summary of the workorder as a whole, who the contact is, what category the order applies to, client reference #, and internal reference # via the order header, .
- identify information that is pertinent to a service workorder via the Service Workorder header – such as the present workorder status as a whole, service date information for the workorder as a whole, whether service has been completed ("locking" edit of parts and labor entries), the invoice number when completed, and whether the workorder as a whole is completed ("locking" edit of entire workorder)
- Via Workorder Item, enter in a summary on service is to be performed, details on service to be performed for scheduled user, actual request date (useful if date of entry is different from the date the client requested the service), status of the workorder item as a whole, and priority of the individual workorder item
- Via Schedule subsection, schedule the user to perform the service in this workorder item which will also show in the graphical Schedule screen.
- Via Labor subsection, identify the schedulable user that performed the service for this workorder item, the details of service performed, the billable hours, non-billable hours, and service rate to charge

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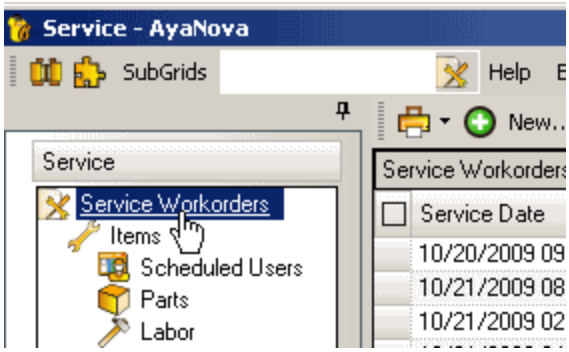
- Via Parts subsection of each Item, identify one or more parts that have been used in service.
- The information you enter provides a history of service performed for the client as well as data for reports and future reference

Do refer to the Overview of a Service Workorder tutorial for a walk through from creating to completing a service workorder.

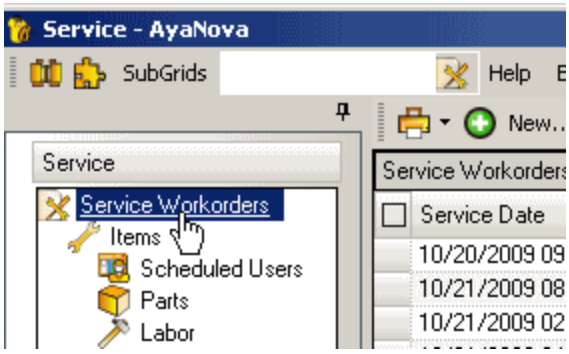
4.3.2 Service grids



The Service navigation pane provides access to service workorder related grids:

Service Workorders
- Items
  - Scheduled Users
  - Parts
  - Labor

4.3.2.1 Service Workorders grid



The **Service Workorders** grid displays information about the service workorder **as a whole** – such as the client, workorder number, project assigned to, overall summary, overall category, overall service date, overall status, overall category, summary, originating pm or originating quote and more.

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The Service Workorder grid is used to:

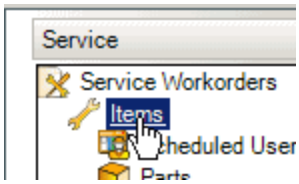
- create a new workorder
- open and view a workorder from the grid
- easily and quickly see an overview of what workorders for what clients are in progress, completed, invoiced, or closed. For example, the dispatcher may view the screen to quickly filter what workorders for a client are presently open.
- obtain a "detailed type" report template on the records that are showing in the grid - for example, even though Parts and Labor information does not show as columns in the Service Workorders grid, if you filter to show only records for a specific client for a specific month, you can print a report that displays total billable in all of those workorder records for that client.

Information about labor, parts etc in a single workorder would **not** show in this grid as it is possible to have multiple labor items, multiple parts, etc in a single workorder. That information would show on subsequent grids or print out a "detailed" report template which will provide that.

See also:

Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client or unit
Printing from a grid

4.3.2.2 Items grid



The **Items** grid displays information from:

- the Service Workorder grid above
- from each workorder item in a Service Workorder such as the workorder item summary, status, priority, type and request date

The Items grid is useful for:

- create a new workorder

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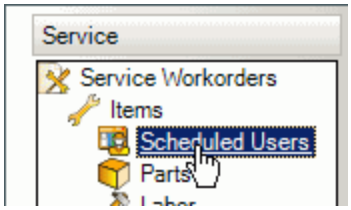
- an overview of each workorder items status and priority
- and to filter and sort columns to display specific records for printing a report that is related to its available columns

See also:

Service Workorder Items
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client
Printing from a grid

4.3.2.3 Scheduled Users grid



The **Scheduled Users** grid displays information:

- on each scheduled user record along with information from its workorder item and Service Workorder.

The Scheduled Users grid is useful for:

- create a new workorder
- filtering to quickly view who is scheduled and when, and for what workorder items and service workorders.
  For example:
  - it may be used by a dispatcher to only display workorder items that are open for a certain date range so they can schedule future items.
  - used by the scheduled user to view their own schedule by filtering to view for only themselves.
- filter and sort columns to view and obtain specific reports on scheduled users
  For example:
  - a report that lists each schedulable user along with the workorders scheduled for

See also:

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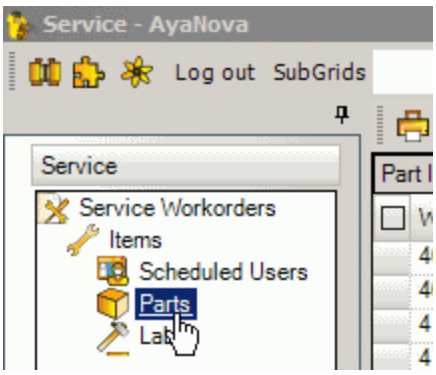
Service Workorder Items - Scheduled Users
Service Workorder Items
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client
Printing from a grid

4.3.2.4 Parts grid



The **Parts** grid displays information:

- on each part selected within a workorder along with information from its workorder item and Service Workorder

The Parts grid is useful for:

- create a new workorder
- filtering to quickly view what workorder has what parts selected with it
- filter and sort columns to view and obtain specific reports on parts entered in multiple workorders
  For example:
  - a report on part profit/cost report
  - a report on parts used in the last month
  - a report on parts used in a specific project

See also:
Service Workorder Items - Parts
Service Workorder Items
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column

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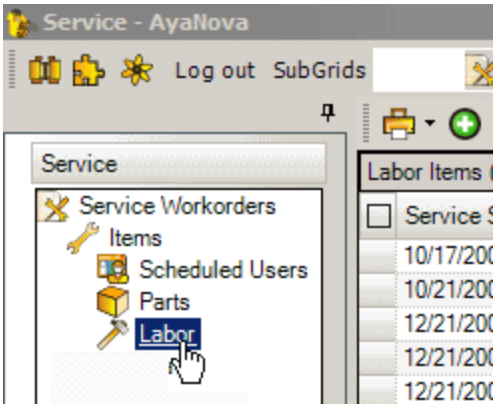
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client
Printing from a grid

4.3.2.5 Labor grid



The **Labor** grid displays information:

- on each labor record along with information from its workorder item and Service Workorder

The Labor grid is useful for:

- create a new workorder
- filtering to quickly view what workorder has been serviced
- filter and sort columns to view and obtain specific reports on labor entered in multiple workorders
  For example:
  - a report on labor hours from all workorders for a specific client
  - a report on labor billable hours for the month

See also:

Service Workorder Items - Labor
Service Workorder Items
Accessing data displayed in main grids
Filtering a grid
Using the Filter Drop List
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Create a new service workorder
Edit an existing service workorder
Listing all workorders for a specific client
Printing from a grid

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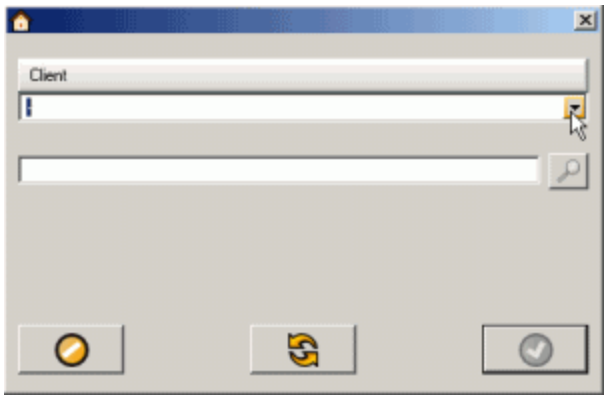
4.3.3 Create a new Service Workorder

A new service workorder in AyaNovaLite can be created **four** different ways:

1. **Use the Accelerator Key combination**
2. **Select the New... menu option in any of the Service navigation pane grids**
3. **Right-click on the client's name in any grid and select Workorder**
4. **Create a new workorder via the Schedule screen**

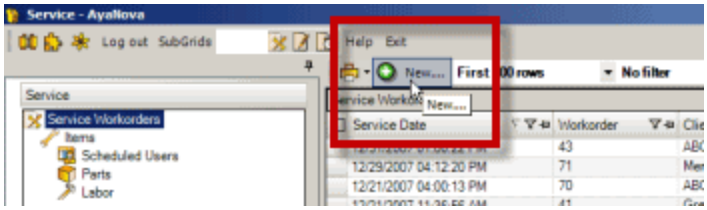
1. From any main grid, press the **Accelerator Key combination ALT-w** using your keyboard which will bring up the client selection window.



Select the client. Select and a new service workorder entry screen for this client will open

See also for more details:
Accelerator Keys

2. Viewing any of the Service navigation pane grids, **select the New... button**.



This will bring up the client and service template selection window for the service workorder you want to create

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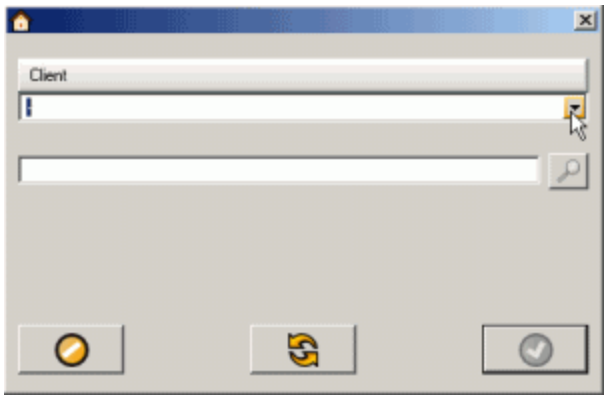
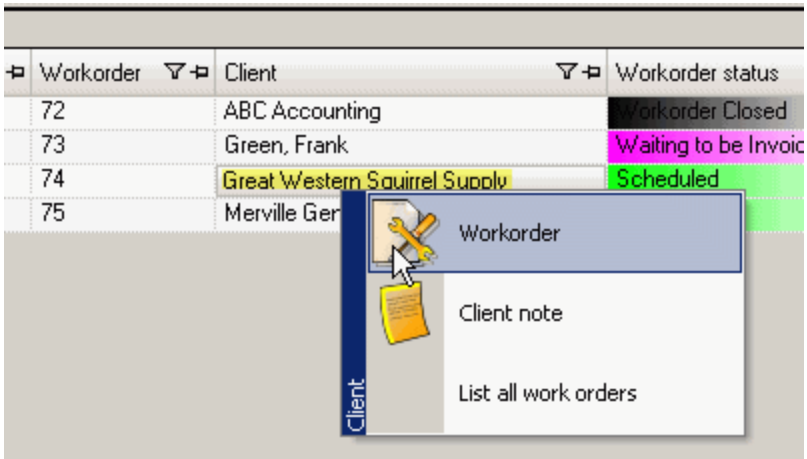
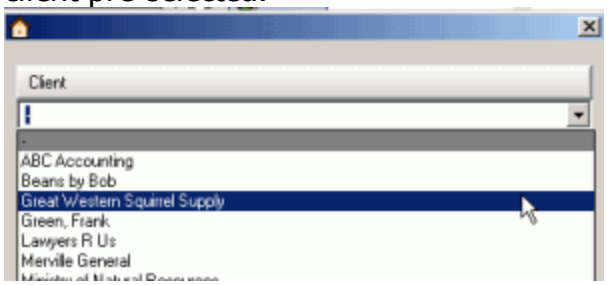


3. **Right click on the client's name** in any grid and select Workorder



This will bring up the client and service template selection window with the client pre-selected.



Select a service template if desired and click on the OK button and the service workorder entry screen will open.

4. Create a new workorder via the Schedule screen

See also:
[How do I schedule a user for new workorder item via the Schedule Screen?]
[New Service Workorder via the Schedule screen]

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4.3.4 View an existing Service Workorder

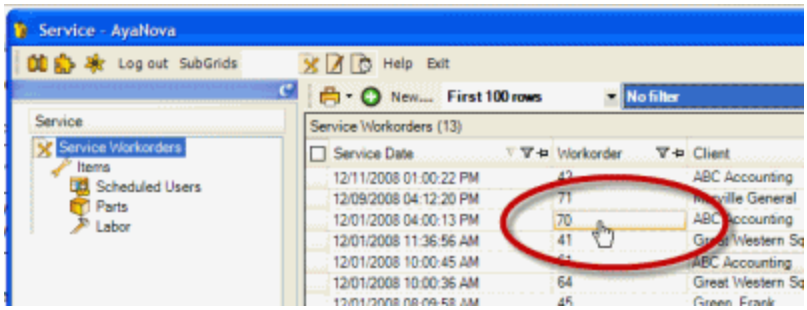
An existing service workorder can be viewed, as well as edited by opening that service work order's entry screen and editing as needed, as long as that the workorder is not check-marked Service Completed or Closed.

A new service workorder can be viewed and edited four different ways:

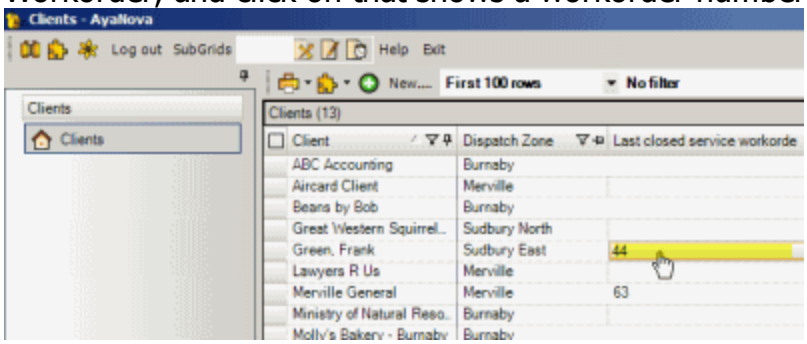
1. **Select the workorder number that shows a link in any grid**
2. **Enter the workorder number in the Direct Open menu option**
3. **Select a recently edited service workorder via the Recent menu option**
4. **Open the workorder item from the Schedule screen**

1. Select the workorder number that shows a link in any grid

For example, in the Service Workorder grid, use your mouse to click on a workorder number



Another example, in the Clients grid, view the column Last Closed Service Workorder, and click on that shows a workorder number



See also:
[Adding, editing and deleting data for display in a main grid]

2. Enter the workorder number in the Direct Open menu option on main toolbar and select the service workorder link

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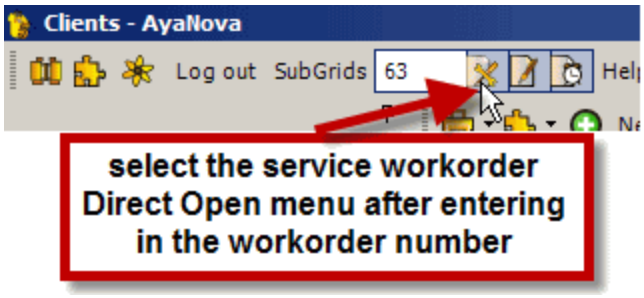
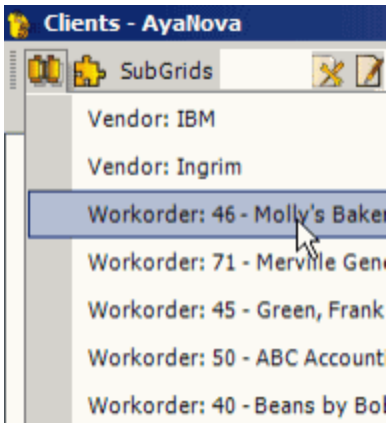


See also:
Main AyaNova Menu Bar

3. Select a recently edited service workorder from the Recent menu option on the main toolbar



See also:
Main AyaNova Menu Bar

4. Open the service workorder from the Schedule screen

a. Double-click on the workorder item in the Schedule Calendar
or
b. Select the workorder item and then click on the menu option

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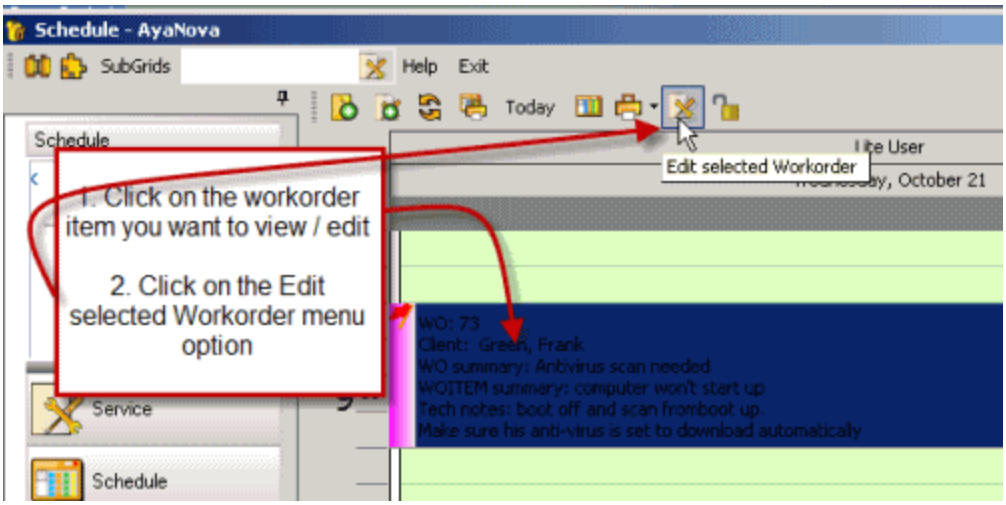
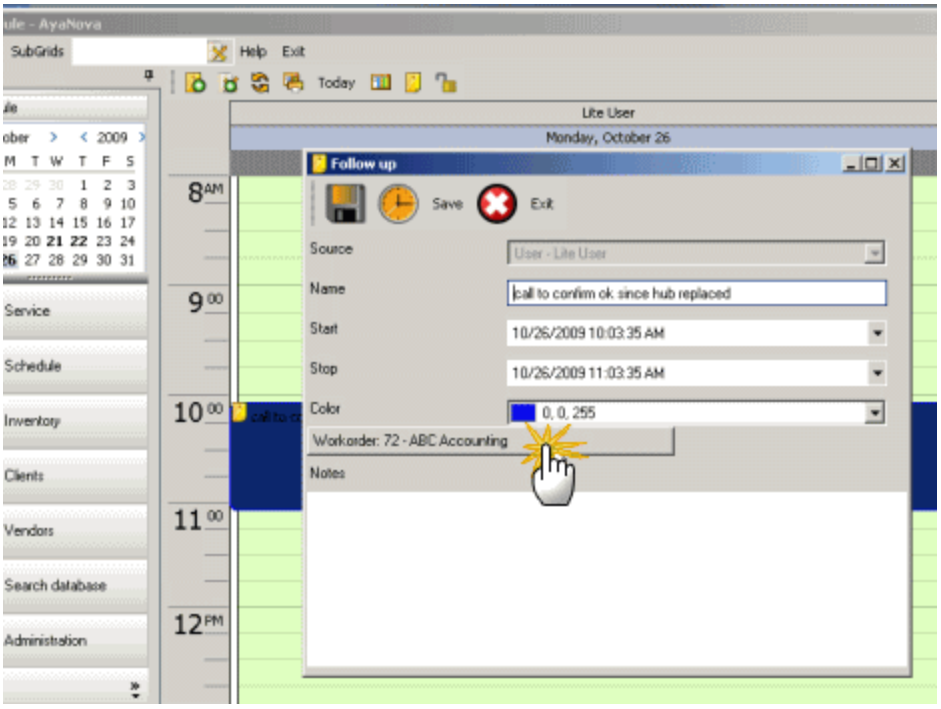


See also:
[Edit selected workorder item]

c. From an existing Follow Up Schedule Marker via the Schedule screen



See also:
[How do I create and view Follow Up in a workorder?]

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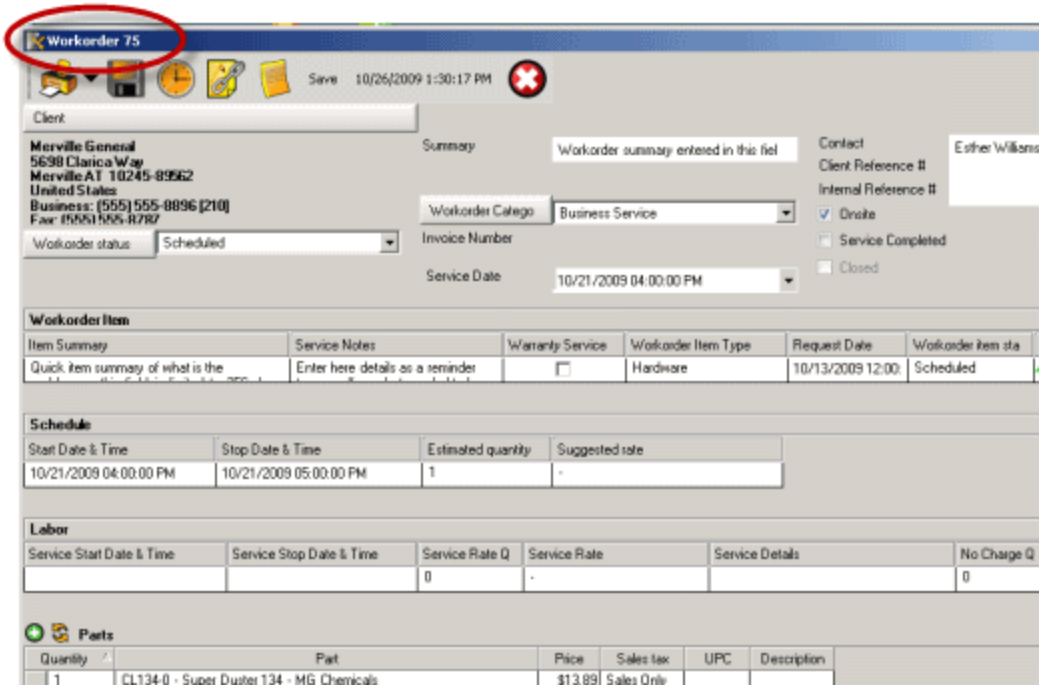
4.3.5 Service Workorder entry screen

4.3.5.1 Workorder numbers



At the very top of the screen in the title bar, the screen is identified as a workorder, and the work order number is displayed.

- Work order numbers are **never** re-used. What this means is if 5000 were the highest work order number and you were to delete that work order, the next work order would be number 5001 even though there is no longer a workorder 5000 in the database.
- When a new workorder is first created, a workorder number is not assigned to it **until** the first time that workorder is saved. This allows you to safely delete a newly created workorder without "using up" a workorder number.
- Because of the inevitable deletions of work orders that can happen do not count on the work order number as being an accurate representation of how many actual work orders your organization has processed.
- If a workorder is set to Service Completed or Closed, it can not be deleted. If you need to delete a workorder that has been checkmarked Service Completed or Closed, you need to un-check-mark those fields first.

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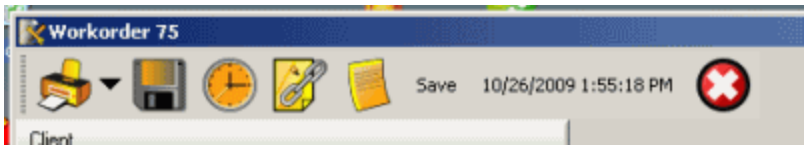
- There is no need to "purge" the database of "old" workorders. Use your grid filters to only view workorders that are pertinent. By not "purging" old workorders, you can still refer back to them if needed or bring up old reports as needed.

- Starting workorder number is set in Global Settings in the Administration navigation pane.

4.3.5.2 Workorder entry screen menu options

4.3.5.2.1 Main Workorder entry screen menu options



Print...

Selecting this menu option drops down to display the list of available reports for the displayed entry screen.

Reports that are available from the Service Workorders grid are also available here for the individual service workorder.

Save & Exit

This menu option saves any changes to this workorder entry screen and closes the entry screen bringing you back to the previously viewed screen.

Record History

This opens up the Record History window displaying the user that originally created the workorder, and date of creation; and the last user that modified this workorder and date of modification.
Do note that the fields are not updated until the object has been saved and closed. For example, if you have just created a new workorder, and have not yet selected Save & Exit – the creator and creation date will be blank until this is performed.

Follow Up

Select this to either add a follow up for this workorder, or view existing follow ups for this workorder. Can be added to a Closed workorder as well as an open workorder

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See also:
How do I create and view Follow Up in a workorder?

Client Note

This opens up the Client Note grid screen where you can enter notes pertaining to that client selected within this workorder.

Client Notes are accessible from the client's entry screen's menu option as well as from any workorder for that client

NOTE: If not utilizing a text field that comes standard with AyaNova, you could edit the field label so that it describes what you are actually using that field for in all service workorder entry screens. For example, if you do not use the Client Reference #: field as it was intended for, you could localize the field label to display instead what you wish. Refer to the section on localization for more information on editing field labels.

Save

This saves any changes made to the workorder without closing the workorder screen. This does not close the screen allowing you to save any changes made to date and continue working, which is recommended to do on a regular basis in the event that there is a problem between you and the database, so that data is not lost.

Changes made to a screen in AyaNova are not automatically saved until you have actually indicated to save it either by selecting a menu option to save, or on closing indicated that it should be saved.

Current Time & Date

This is displayed at the top of the service workorder is the present time and date.

A useful tool for when you want to enter the present date and time in a field is to place your cursor in the field and then use your mouse to click on the Date & Time at the top menu. This will insert the present date and time. Or select to enter the time in a text field in the workorder

See also:

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Current Date & Time feature in workorder entry screen as a timer

Delete

This deletes the **whole** workorder. Note that only if you have rights to do so will this toolbar option be available.

Any object in AyaNova that is deleted is deleted permanently. There is not an "undo" button or option. If you went ahead and accepted the confirmation message and deleted something you should not have - your options are to re-enter it from scratch, or restore your database from your last backup.

Do note that once a workorder has been check-marked Closed, a workorder can not be deleted as it is now permanently historical information only for reporting and viewing.

If a button is grayed out, or does not respond when clicked, that would indicate you do not have rights to access or perform the feature, or the button is not available at this time.

4.3.5.2.2 Workorder Item menu options

The following toolbar menu options display when you have clicked within that specific section of the service workorder.

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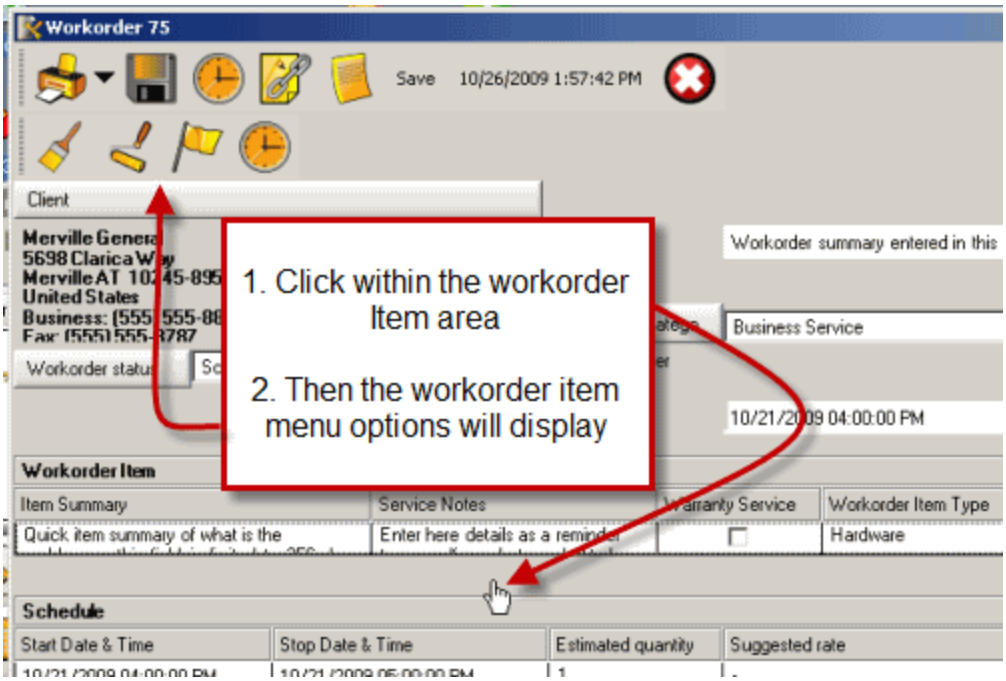

If Workorder Item is selected (click within the Item area) then the following menu options will show:

Workorder Item Types

Types are selectable from the workorder item grid. This toolbar item opens up the Workorder Item Types subgrid whereby you can create new or edit existing workorder item types.

Workorder Statuses

Statuses are selectable from the workorder item grid. This toolbar item opens up the Workorder Statuses subgrid whereby you can create new or edit existing statuses. This is the same grid as when you select the Workorder Status button within the Service Workorder header.

You will note that there is a Workorder Item Status as well as a Workorder Status field in the workorder

Priorities

Priorities are selectable from the workorder item grid. This toolbar item opens up the Priorities subgrid whereby you can create new or edit existing priorities. You can also create and edit Priorities via the main toolbar menu SubGrids.

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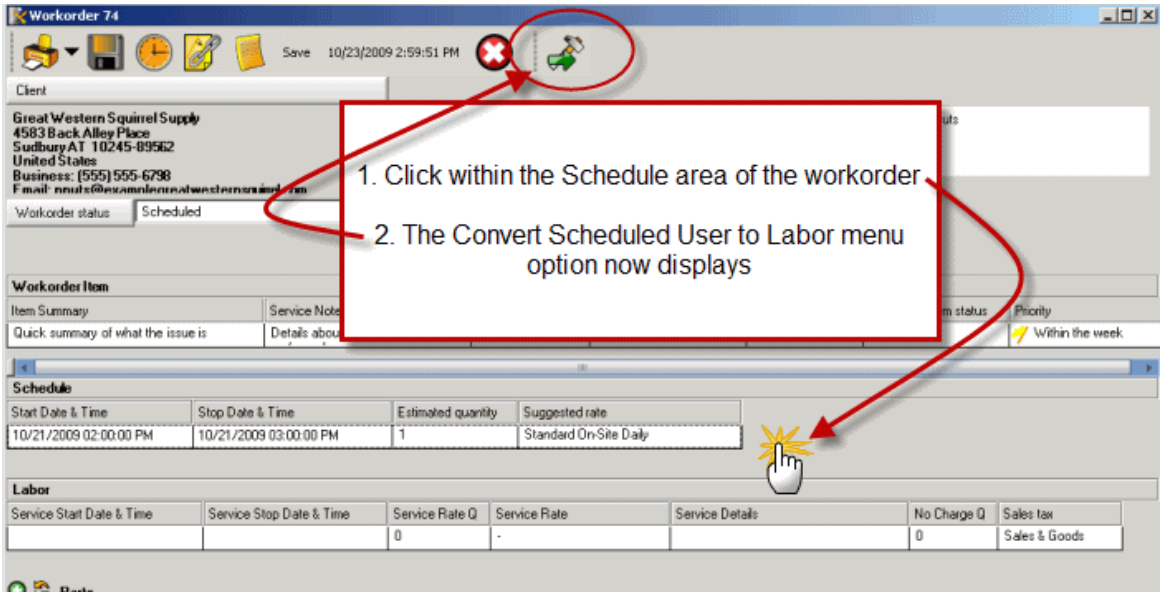
Record History

This opens up the Record History window displaying the user that originally created the workorder item, and date of creation; and the last user that modified this workorder item and date of modification.

Do note that these fields are not updated until the object has been saved and closed. For example, if you have just created a new workorder item, and have not yet selected Save & Exit – the creator and creation date will be blank until this is performed.

4.3.5.2.3 Scheduled Users menu option



If Scheduled Users sub-section of a workorder item is selected the menu option displays:

Convert Scheduled User to Labor

Selecting this will copy over the selected scheduled user, start and stop date and time, estimated quantity and suggested rate to the Labor sub-screen.

This is a time-saving feature to be used if the actual service provided coincides with the scheduled user and times. Of course you will still need to enter the details of the service provided into the Labor sub-screen.

See also: Convert Scheduled Users to Labor easily

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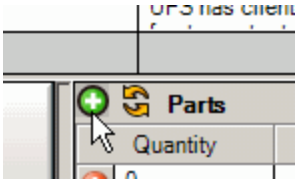
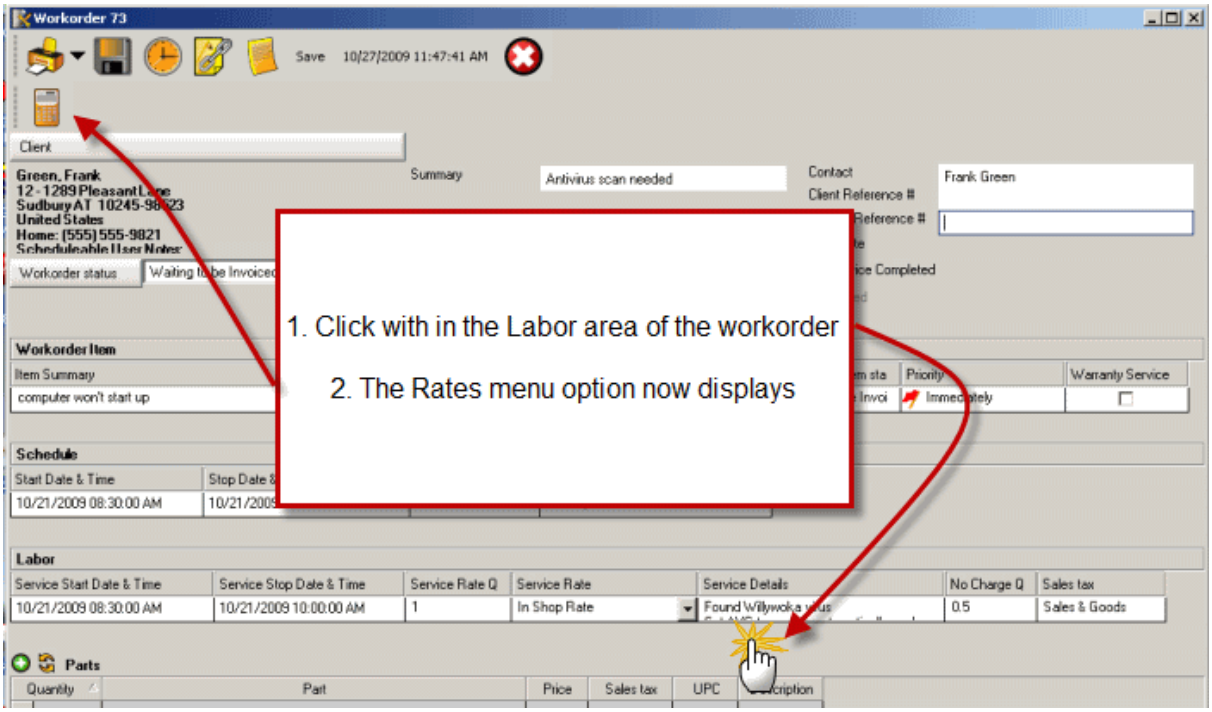
4.3.5.2.4 Parts menu option

At the top of the Parts subsection itself are menu options for **adding parts and refreshing the list** from within the workorder entry screen when you have added additional parts via this menu option.



See also:
[Part entry on the fly in a workorder]

4.3.5.2.5 Labor menu option



If the Labor sub-screen sub-section of a workorder item is selected, the menu option displays:

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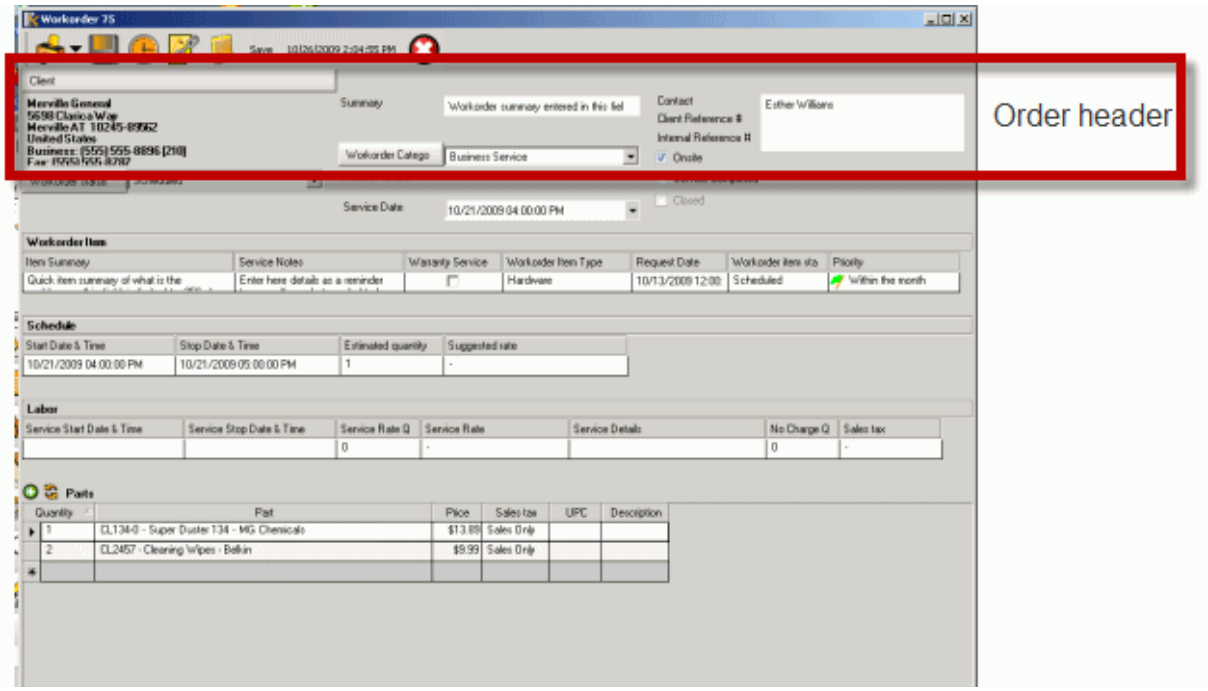
Rates

This opens the Rates grid to allow you quick access to add or edit existing rates so they are selectable from the Labor grid. Rates can also be edited and created via the main toolbar menu SubGrids. Refer to the Rates section in this manual for more information.

See also:
Rates
Convert Scheduled Users to Labor easily

4.3.5.3 The Order Header



The order header identifies the workorder as a whole

- which client the order is for
- what category the order applies to as a whole
- who the contact is for the whole workorder
- what client reference # for the whole workorder is
- and what internal reference # for the whole workorder is.

Fields of the Order header area:

Client

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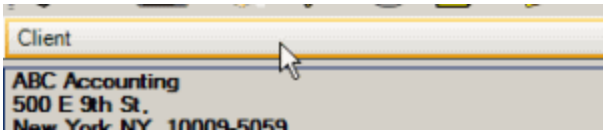


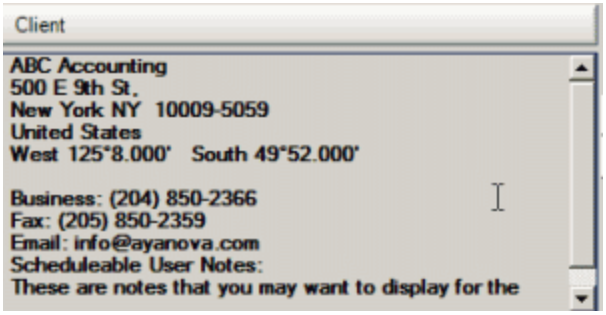
The client is selected prior to opening of the order. When a service workorder is loaded, much of the client specific information is also loaded and "made ready", therefore a client cannot be changed from within a workorder.

It is **not** possible to select a different client from within an existing workorder.

Note the **time saving feature of the Client "jump" button** above the Client display:

> In many areas of the program where there is a drop down selection list, there is also a button above or to the left of the drop down selection.
>
> The purpose of the buttons above or beside drop down selection lists is to take you directly to the screen where the data contained in the drop down list is entered or edited.
>
> This is a very important feature, it means that if you are in the middle of entering a work order, you don't need to abandon it part way through to edit or add new information.
>
> Also this provides quick access to any information within the Client entry screen, such as contact information, etc.

Client contact info



Contact information about the Client, including schedulable user notes are displayed immediately below of the Client button.

> For space saving reasons, only the first few lines of the clients address and contact information is initially shown. If you click within the field itself, it will expand automatically, as well as display a scroll bar to the right if there is a lot of information.

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Or just click on the Client button to open up the Client entry screen directly.

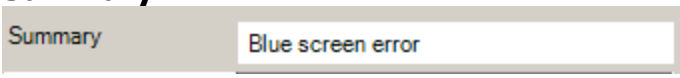
This information is taken from the client record as it was entered on the Client entry screen and is displayed for your convenience if you need to contact the customer while in the process of entering a work order.

The client contact info box is grayed to indicate this is not directly editable. If information here needs to be changed, select the Client button at the top to open this client's Client entry screen, perform the needed changes, save & exit which will return you to this service workorder.

As stated previously, only when the service workorder is first opened does all information regarding the client get obtained – so if you edit address information, etc - to display these changes, close the service workorder and open it back up.

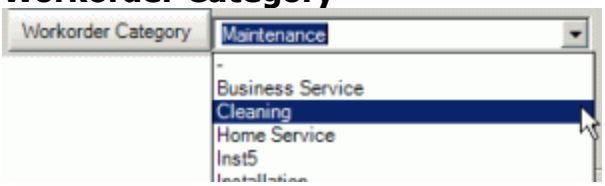
See also:
Clients

Summary



This text field is a single line of text that summarizes all the work to be done on this work order as a whole. It is used to indicate to AyaNova users the purpose of the work order as a whole in summary with no details (details are entered in the workorder item grid below).

Workorder Category



This drop down selection field allows you to categorize the service workorder as a whole. This is useful for both filtering the Workorder grid and for generating management reports that are filtered by category. A category can be anything you want it to be.

For example: AyaNova may be used by a service business with different departments who want to see management reports based on each department separately.

See also:

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Workorder Categories

Contact

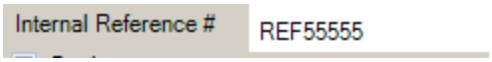
By default when a new workorder is created for a client, the client's text from its Contact field is automatically copied to this field. This can be edited as needed.

This text field intended use is to indicate a client contact person, usually the person who requested the service or is the person to contact once onsite. This is useful if you use it to display in Dispatch reports so that the schedulable user knows who requested the service. As this field is a text field, you could easily localize the label, call it whatever you wish and enter what whatever you wish.

Client Reference #

This text field's intended use is to record a customer reference number so that the clients can match up the work order to their own internal paperwork system. As this field is a text field, you could easily localize the field label, call it whatever you wish and enter what whatever text you wish.

Internal Reference #



This text field intended use is to record your company's additional internal reference to the workorder number. As this field is a text field, you could easily localize the field label, call it whatever you wish and enter what whatever text you wish.

Onsite

This is used to indicate whether the work was done in-house or on-site. This is useful to identify in house or onsite service by filtering within grids. By default a new service workorder is check-marked on-site

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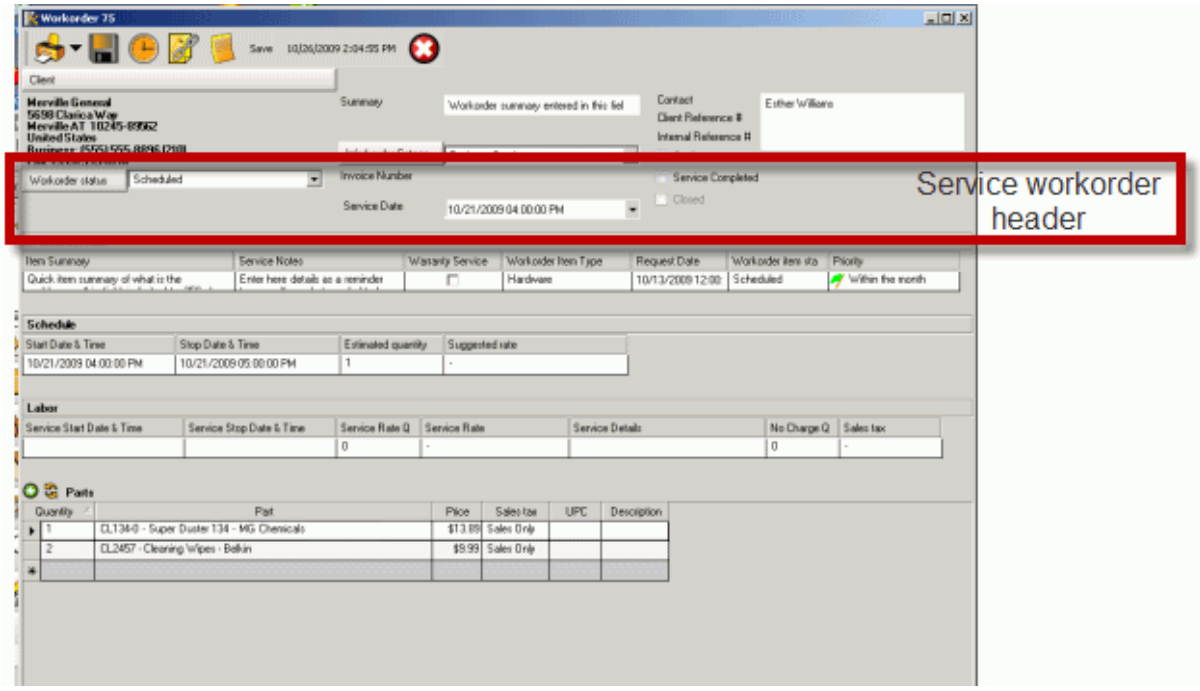
Also note that as with any field label in AyaNova, you can localize any field label in the Workorder header to display whatever text you want in whatever language you want.

See also:
[Localized Text Designer]

4.3.5.4 The Service Workorder Header

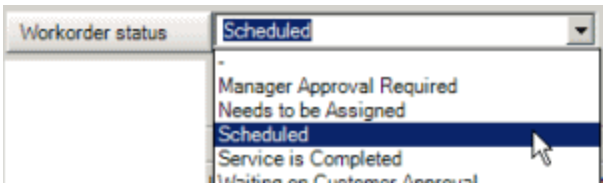


The service workorder header identifies the following:

- such as the present workorder status as a whole
- the invoice number when completed
- service date information for the workorder as a whole
- whether service has been completed ("locking" edit of parts and labor entries)
- and whether the workorder as a whole is completed (Closed) ("locking" edit of entire workorder)

Fields of the Service Workorder header area:

Workorder Status



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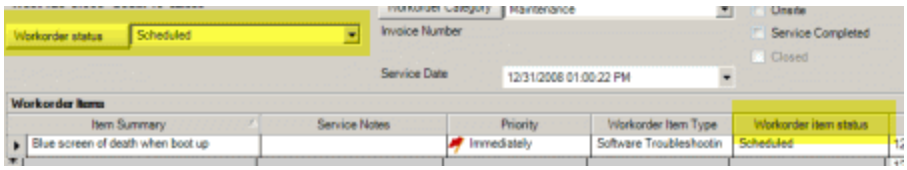
This drop down selection field is used to indicate the overall status of a service workorder. This would be useful to a service manager to determine the progress of a work order as a whole. It would also be useful to other company staff when fielding questions from customers about the progress of their work order.

Workorder Status is strictly for visual display only and does not affect the operation of the program.

NOTE: The statuses displayed here are examples only - you can create whatever statuses you want.



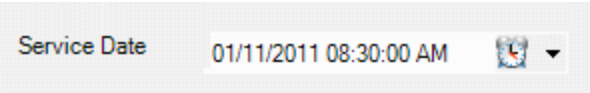
NOTE: Workorder Status selected for the workorder as a whole do not show on the graphical Schedule Screen as the Schedule screen pertains to individual workorder items - **only the Workorder Item Status color** does show on the Schedule screen calendar.

For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item's status.

We provide both here for you so that you as an organization can use what works best for yourself. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas.

See also:
Workorder Statuses

Service Date



This is a date field with which you can identify a single date for the entire service workorder.

Its intended use is to indicate the scheduled date for the service workorder as a whole; you may use it to indicate the date all service was completed, you may even localize the field label to display as Invoiced Date or some such.

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By default, the date the workorder was created is pre-selected for you, but you can edit as needed and change this date.

Invoice

Invoice Number

This text field used to indicate the invoice or sales receipt number that your organization has used to bill this work order to the client.

NOTE:This field is grayed (unable to be edited) until the workorder has been set to Service Completed.

Invoice Number INV7878 Service Completed Closed

If you filter the Service grid by the Invoice Number, you can see very easily what workorders have not yet been invoiced.

By leaving it blank you indicate that the work order has not yet been billed out.

It also serves as a cross reference to match up a service workorder to an invoice from your accounting software if it prints on your completed work order reports. This is helpful for both your organization's accounting staff and your customer's accounting staff.

If a work order is "no charge" or not billed, you should enter something (i.e. "no charge" or any text) in this field so that this work order will not appear on a report listing not invoiced workorders.

You can leave this field blank if you are not concerned with tracking which work orders have been billed or not, however unless you are a non-profit organization or are using AyaNova for internal use only, you should seriously consider the benefits of using it.

Many of our clients have told us that this feature alone more than repaid their investment in AyaNova as it eliminated work orders forgetting to be billed.

And as with all labels within AyaNova, if a field is not labeled as would be used in your organization, you can edit the label as needed via the Localized Text feature.

For example, if your organization would not ever use this field but you wish to identify something else in a service completed workorder, you

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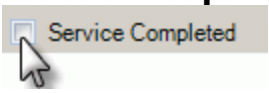
could edit the field label to something else required in a workorder header. Just remember it will be this way for every workorder. Refer to the section on Localized Text Designer in the Administration section for more information.

Service Completed

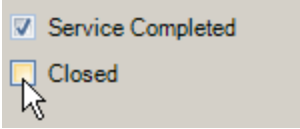


Once set to Service Completed, the only fields that are editable are the Workorder Status field, Service Completed, Closed and the Invoice Number field

The service workorder can not be deleted or edited if Service Completed has been checked.

This feature is to prevent accidental workorder item changes once a workorder service has been completed, but the workorder is not yet ready to be closed – for example, an invoice has not yet been prepared.

Closed



Once a service workorder is set to Closed, it is no longer editable. This is a preventative measure, to ensure that further editing of a closed workorder is not performed after it has been closed.

Do note that you **can** open a Closed workorder again so that it can be edited if needed.

Also note that as with any field label in AyaNova, you can localize any field label in the Service Workorder header to display whatever text you want in whatever language you want.

See also:
Localized Text Designer

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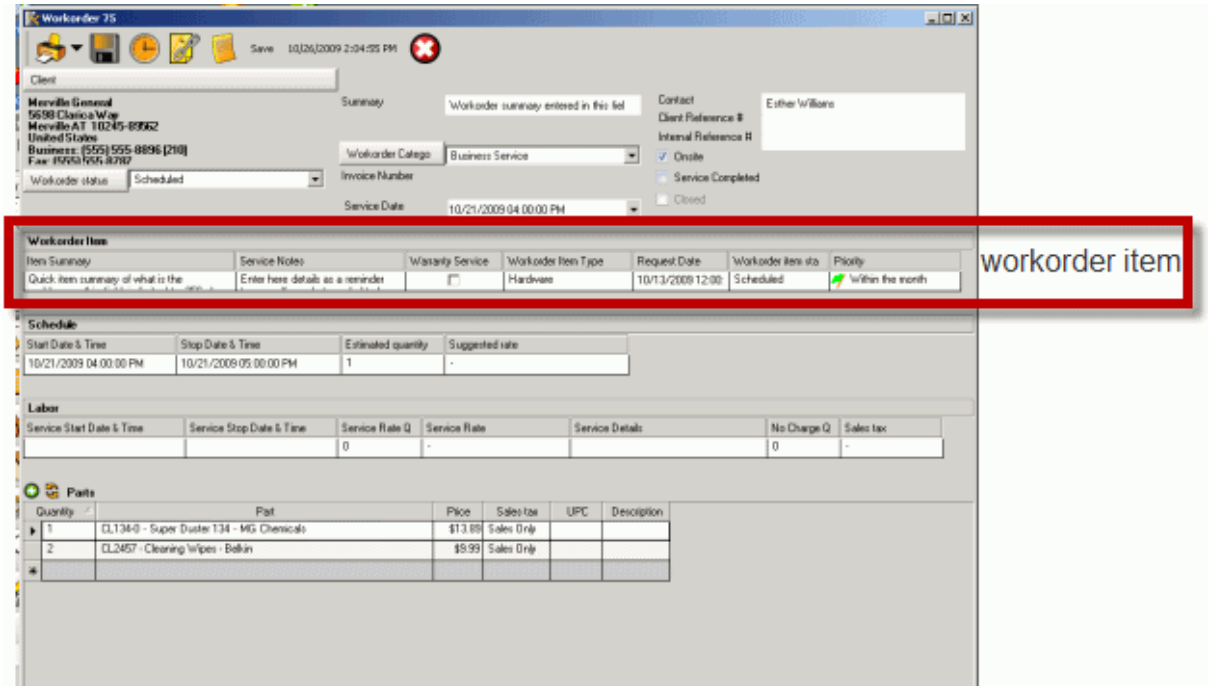
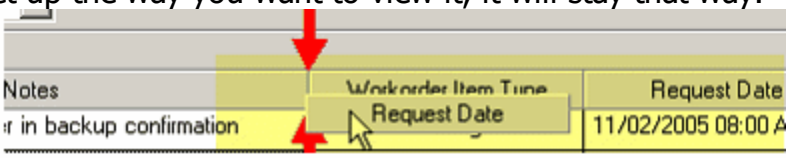
4.3.5.5 Workorder Item

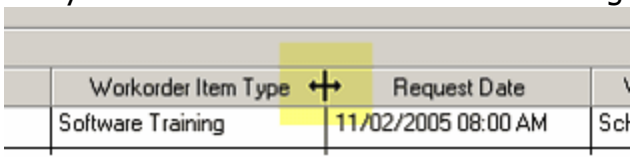


The workorder item is where a summary on service is to be performed, details on service to be performed, actual request date (useful if date of entry is different from the date the client requested the service), status of the workorder item as a whole when showing on the Schedule screen, and priority of the individual workorder item which also shows on the Schedule screen.

- Drag and drop columns to desired grid position. AyaNova will maintain your grid settings for the next time you log into AyaNova, so once you have a grid set up the way you want to view it, it will stay that way.



- Place your mouse between columns and drag to change the width of columns.



See also: [Moving and sorting columns in a grid]

Fields of the Workorder item record:

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Summary

This text field is where you can enter a brief description of what service is to be performed or required.

The Summary field is limited to 255 characters.

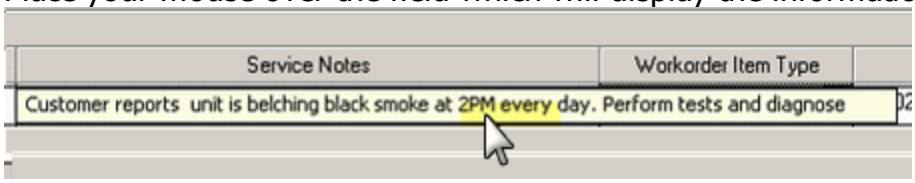
The information entered here displays on the Scheduled List grid Summary column, and is viewable from the Schedule screen if selected to display via the Workorder Summary Template editor in Global Settings.

See also:
Global Settings - Workorder Summary Template

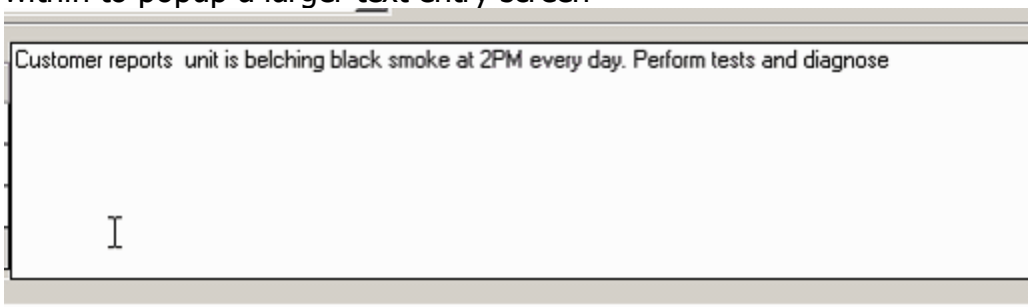
Service Notes

This is a text area where you can provide detailed information about what service is needed.

Place your mouse over the field which will display the information expanded.



To enter information, and to view all text information in this field, select within to popup a larger text entry screen



Workorder Item Type

This drop down selection is to identify what type of service is being performed for this workorder item. This is useful for reporting and for filtering the grid view.

For example, if you run a yard and mower maintenance service business, you may want to identify lawn maintenance from yard repair like fence or gate repair. Or if you run a computer service shop, although the Workorder Category may be Networking, you may want to further distinguish the

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individual workorder items that are networking related even further such as Network Cabling, Network Configuration, Network Hardware, Network Software and so on

You can create or edit additional Types by selecting the Types toolbar item at the top of the workorder screen, or via the main toolbar menu SubGrids.

See also:
Workorder Item Types

Request Date

Intended use is the date service was requested by the client. A workorder may not be created till the following day, but you may want to track when a client requested service against when you were able to schedule a user to perform it, or against when service was actually performed to determine if you need to hire additional staff to meet your client's needs.

Workorder Item Status

As a workorder item progresses, you will want to change the Status of that workorder item to advise others of this, as well as to remind yourself.

Although drop down selection is the same Status selection as identified within the service workorder header, Workorder Item Status sets the color for a workorder item in the graphical Schedule screen

Workorder Status set in the service header is for the workorder as a whole – Workorder Item Status identifies the status for this particular workorder item.

From the Schedule screen, the workorder item description will display its background color as the color associate with the Status. This is useful for scheduled users to view at a glance the status of a workorder item.

Status is suggested to be other than Open or Closed. For example, you may have Status's that denote the stages between receiving the service request to receiving payment from the client – therefore may have status such as "Scheduled", "Waiting on Parts", "Waiting on Unit Warranty Replacement", "Customer Notified, Waiting on Pickup", "Customer Billed, Waiting on Payment" etc.

Status can be what ever you want that will allow you to better filter your workorders and keep up on the progress.

You can create or edit additional Statuses by selecting the Status toolbar item at the top of the workorder screen.

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See also:
Workorder Statuses

Priority

Priority is different from Status as it signifies how important a workorder item is, or how urgent a workorder item may be.

When viewing the Schedule screen, a workorder item will display a colored flag with the selected color of the priority for this workorder item.

You can create or edit additional Priorities by selecting the Priorities toolbar item at the top of the workorder screen.

See also:
Priorities

Warranty Service

This checkmark field can be used for whatever you wish. Using the default locale, it is localized to Warranty Service so that you can place a checkmark here if desired. As with any field label in AyaNova, you can localize any field label in Items to display whatever text you want in whatever language you want.

See also:
Localized Text Designer

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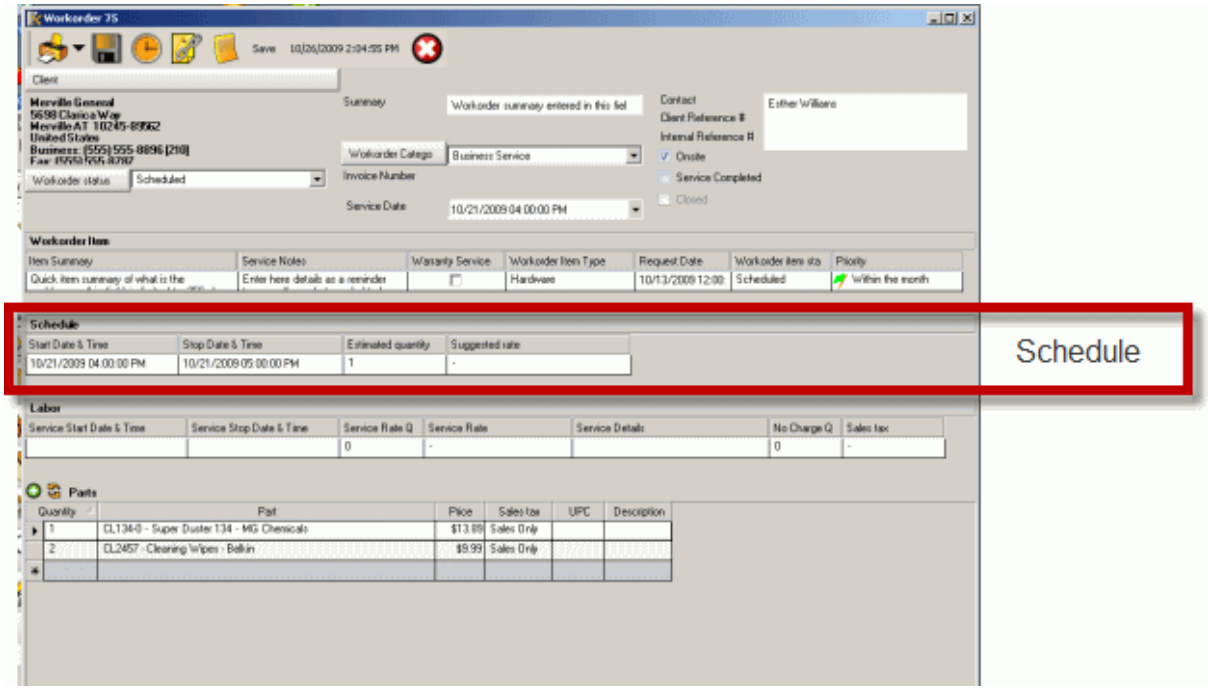
4.3.5.6 Schedule



The Scheduled User subsection:

- Identifies start date and time, stop date and time
- Identifies suggested service rate and estimated hours of service
- This information is what is scheduled on the Schedule screen
- Provides ability to copy this information to a Labor item as time saving feature

See Also:
Scheduled Users menu option
Moving and sorting columns in a grid

Do be aware that the graphical Schedule screen requires at minimum that both Start and Stop date/time fields be filled out for this scheduled to show.

The Scheduled User subsection:

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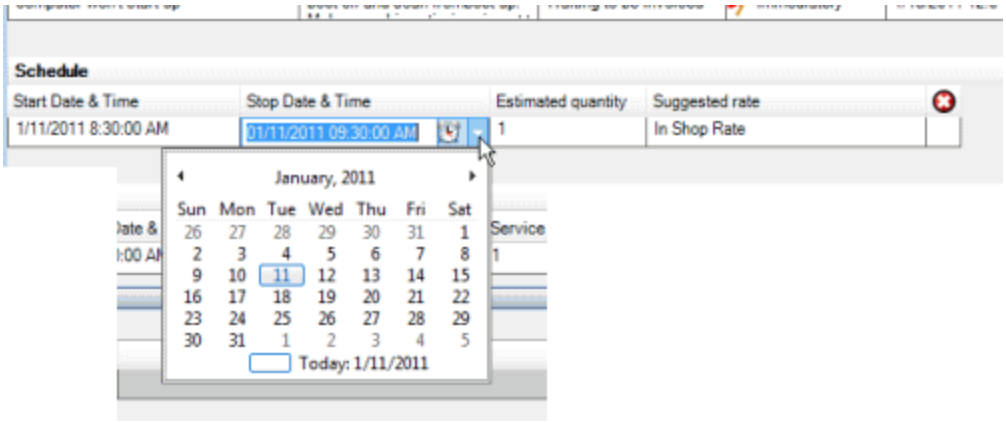

Start Date & Time and Stop Date & Time

These columns are where you would indicate the start and the stop date and time

As a time saving feature, when you enter a start date and time and tab off of it, the Stop Date & Time will automatically default to the time range set in Global Settings for Scheduled / Labor Default Minutes after the Start Time; and the Estimated Quantity will automatically be derived from the start and stop time.

You can easily edit as needed by placing your mouse in the fields and editing.

See also:
Date and Time selection

Estimated Quantity

This column as a time saving feature, automatically enters the number of hours derived from the Start and Stop Date & Time. You can of course edit it as needed.

The Estimated Quantity field is also useful if no date and time are initially set, but this way remind you how long you will want to schedule for.

The Estimated Quantity field is also useful if you use the Convert Scheduled User to Labor menu option, as that menu option will pre-enter in the estimated hours into the actual hours, saving double-entry.

Suggested Rate

Use the drop down arrow when you place your mouse in this column to select the suggested rate that the service is to be billed at. This is useful if the dispatcher wants to advise the scheduled user of the type of rate to use. This is also useful if you use the Convert Scheduled User to Labor, it

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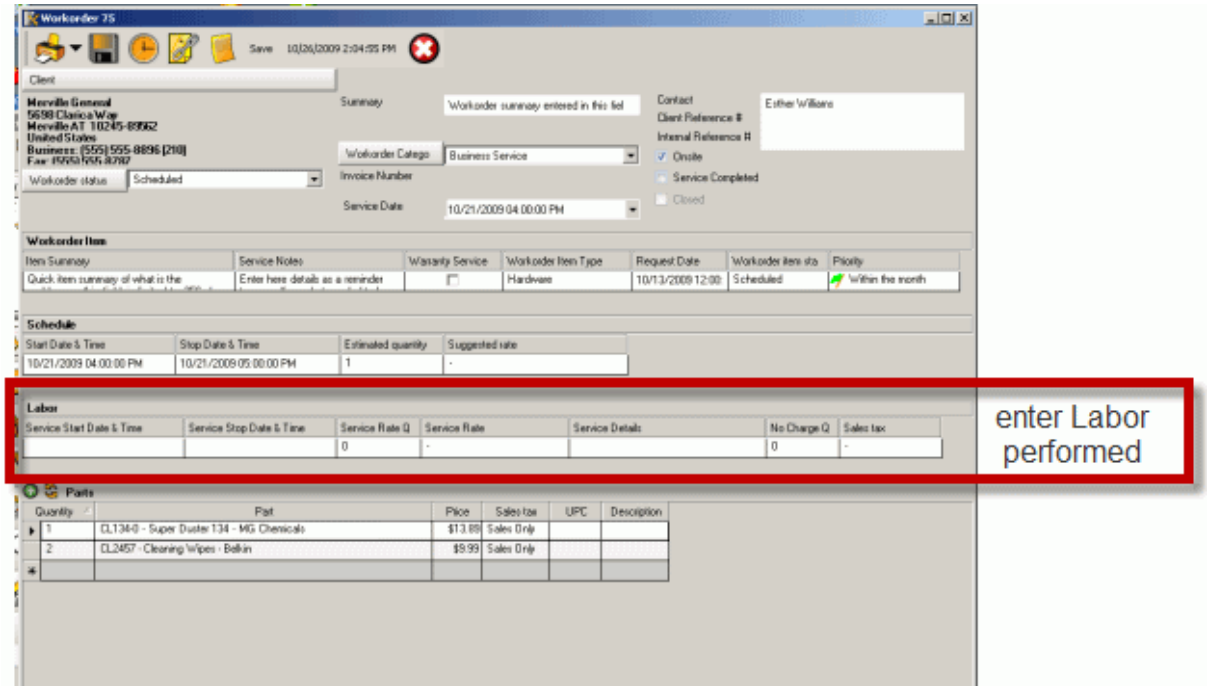
will pre-enter in the estimated rate into the actual rate, saving double-entry.

See also:
Rates

4.3.5.7 Labor

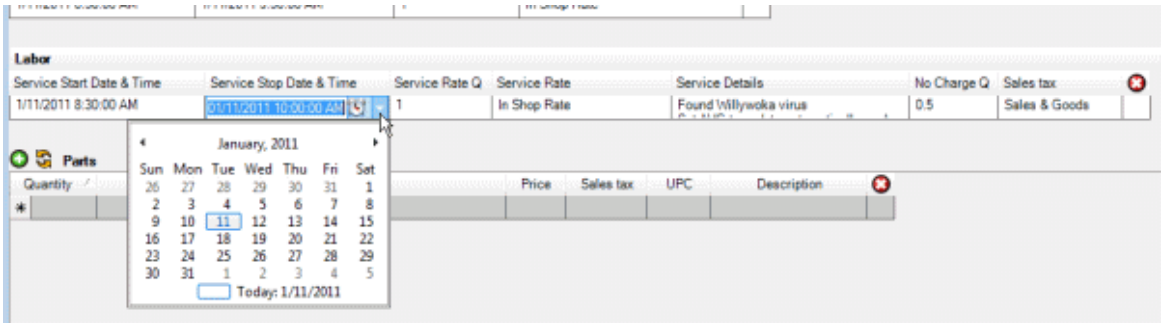


The Labor subsection:

- Identifies the details of service performed
- Identifies billable hours, non-billable hours, and service rate to charge
- Provides a history of service performed for the client, as well as data for reports and future reference

See also: Moving and sorting columns in a grid

Fields of the Labor section:



Service Start Date & Time and **Service Stop Date & Time**

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These columns are where you would indicate the start and the stop date and time

As a time saving feature, when you enter a start date and time and tab off of it, the Stop Date & Time will automatically default to the time range set in Global Settings for Scheduled / Labor Default Minutes after the Start Time; and the Service Rate Quantity field will automatically be derived from the start and stop time.

You can easily edit as needed by placing your mouse in the fields and editing.

See also:
Date and Time selection

Service Rate

This drop down list shows all the rates entered into the rate entry screen in AyaNova that are marked as service rates and not travel rates.

The rate selected would be used in conjunction with the Service Rate Quantity and No Charge Quantity to calculate the charges on a completed format work order report and for various management reports.

See also:
Rates

Service Rate Quantity

The Service Rate Quantity is the quantity of billable time.

The Service Rate Quantity will automatically reflect in hours up to two decimal points derived from the Start Date & Time and Stop Date & Time.

If you do not use "hours" as your quantity, edit this field manually after selecting Start and Stop Date & Time.

Edit as needed. Do note that if you change the Start or Stop Date & Time, this will automatically change the Service Rate Quantity, so edit after setting the Start and/or Stop Date & Time.

No Charge Quantity

This would be the numeral amount of the rate not billed. You enter this amount manually.

Entering no charge amounts can be used to indicate on workorder reports to a client how much free work they received.

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Both the Service Rate Quantity and the No Charge Quantity columns allow you to enter in the number of hours to charge the customer for the work provided. You can enter whole numbers or fractions of hours (e.g. 1.5, 1.25).

For example, a technician was onsite for 4 hours total: The decision is to charge the client only for 1 hour. Therefore Service Rate Quantity will have the number 1 for the number of hours that are actually billable. The No Charge Quantity will have 3 entered to indicate the total number of hours that are not billed. The two combined fields total the total number of hours.

In many service industries it is sometimes necessary to perform some work at no charge; this gives you an opportunity to indicate this clearly to the customer and gain goodwill by making it apparent to the client that they have not been charged for something.

Service Details

In this area you can type up to 65,535 characters of text.

When you begin typing, the field "opens" up so that you can easily enter a lot of text

While it is not necessary to enter anything here, it can be used on a service workorder report to explain to the client what they are being charged for and in our experience the more you enter here the fewer questions you will get from your clients about the bill.

Depending upon the type of service you provide you may want to type in a great amount of detail on every work order.

This is because the text entered here is indexed for quick retrieval on the search screen and may be of benefit to other service personnel at a later date when they come across the same problem that needs to be fixed.

See also:
Search Database

Sales Tax

If utilizing AyaNova to invoice out to your customers (printing a service workorder report showing billable items) and tax is charged for services, select the appropriate Tax you have created here so that it is applied in your report that you provide to the customer as an invoice.

See also:
Tax Codes

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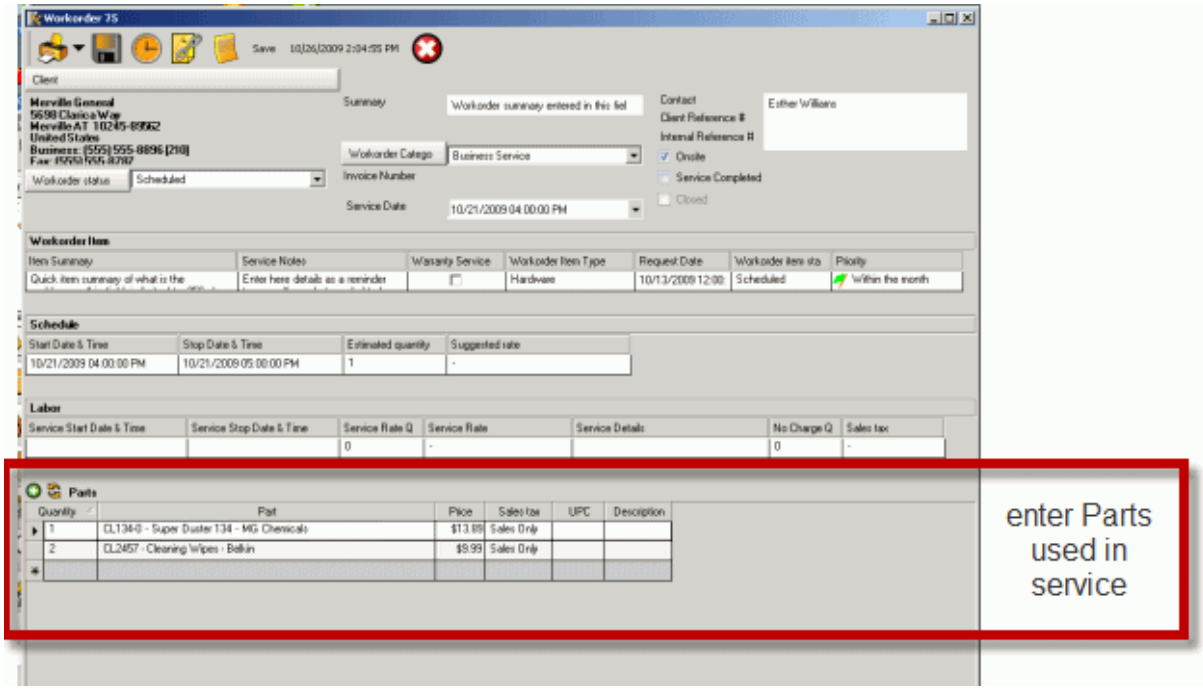
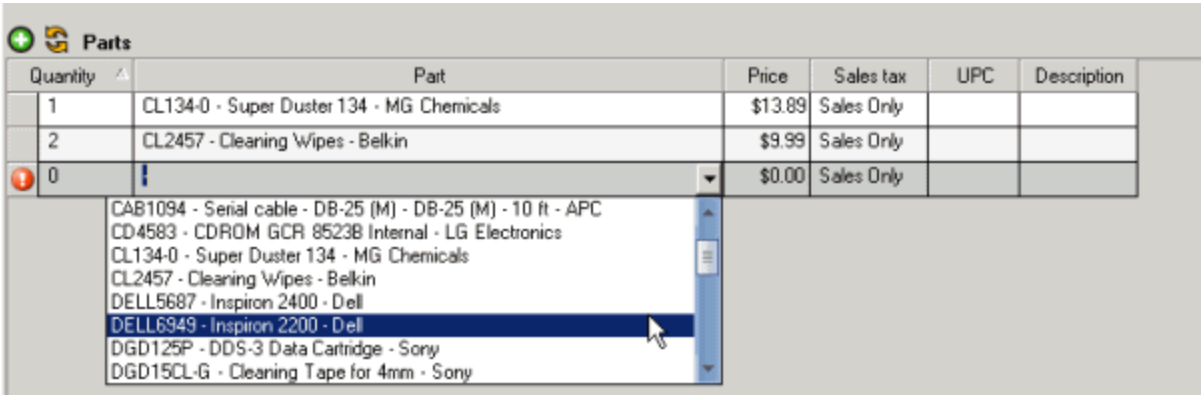
4.3.5.8 Parts



The Parts subsection:

- Identifies parts and their quantities that have been used in service.
- Create new parts

See also:
[Parts menu options]
[Moving and sorting columns in a grid]



Part

Select the part from this column.

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How parts display in the selection is dependant on the Global setting for Part Display Format within the Administration pane – whether part number + part name + part manufacturer or part name + part number or etc.

See also:
Parts
Global Settings
Drop Down Fields

Quantity

Enter here the quantity of the selected part.

UPC

If you have entered UPC codes within the Part entry screen for the part, you can place your mouse cursor in the field and use your keyboard scanner to scan in the UPC which will automatically bring up the part associated with it so you do not have to select from the Parts column.

Price

When the part is selected, the part's Retail Price is obtained from that part's entry screen.

You can edit the part retail price as needed.

Do note that if a discount amount is entered in the Discount column it is applied against this price. This is not the price with the discount already applied.

Description

This is where you can enter additional information about the part.

For example, a suggestion is to use this to enter in the serial number of the part sold.

Sales Tax

If utilizing AyaNova to invoice out to your customers (printing a service workorder report showing billable items) and tax is charged for parts, select the appropriate Tax you have created here so that it is applied in your report that you provide to the customer as an invoice.

See also:
Tax Codes

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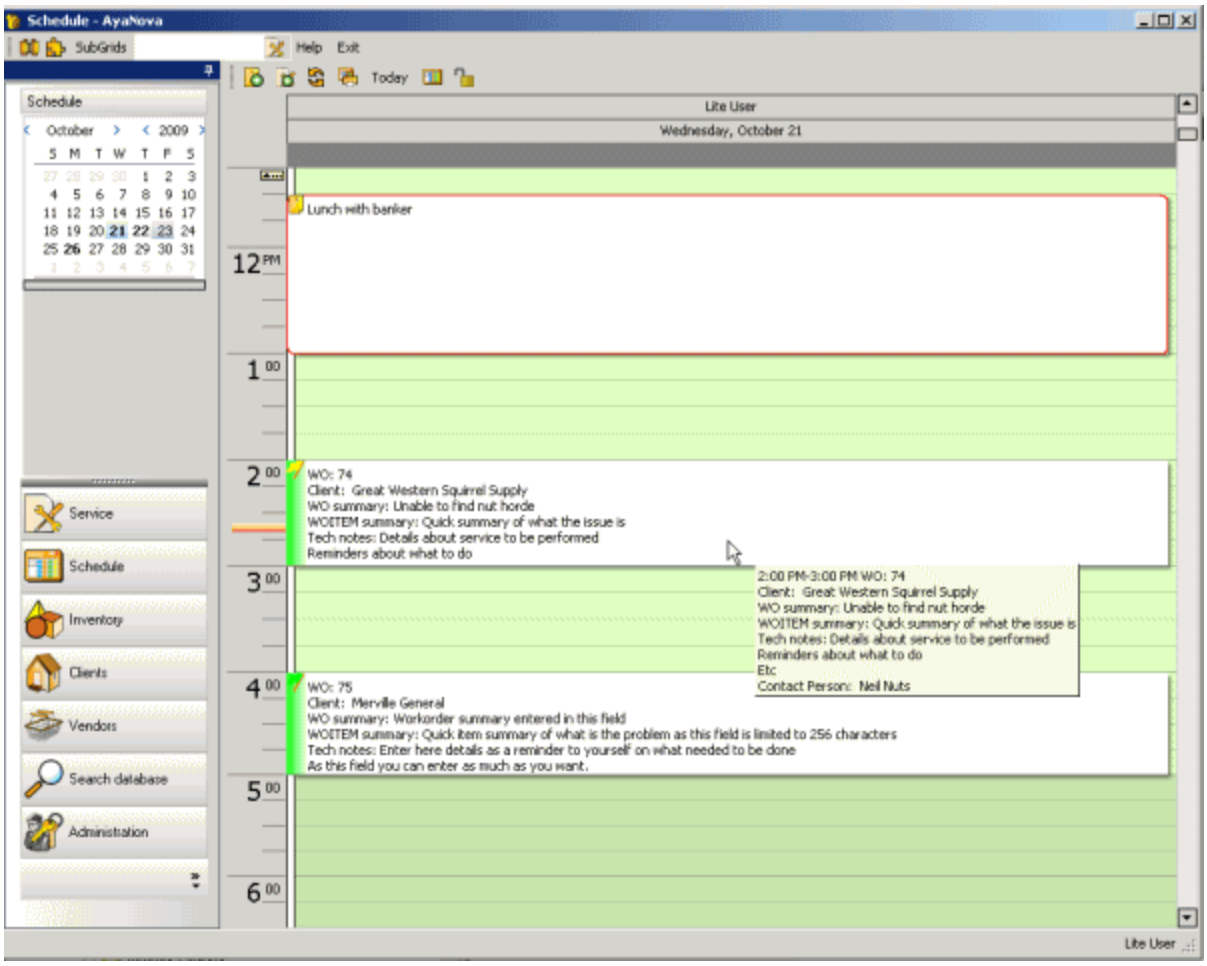
4.4 Schedule screen

4.4.1 What do I use the Schedule Screen for?



The Schedule screen is the calendar and scheduling component of AyaNova.

With the Schedule screen you can:

- Visually manage scheduled workorder items within a time period.
- Use your mouse to drag and move a scheduled workorder item to another time period
- Quickly create new work orders directly from the Schedule screen.
- View any time range such as day, week, work week or monthly
- Create and view Schedule Markers and Follow Ups
- Print out dispatch orders
- Print graphical views of the Schedule screen
- View a day in horizontal view

The Schedule screen displays workorder items assigned.

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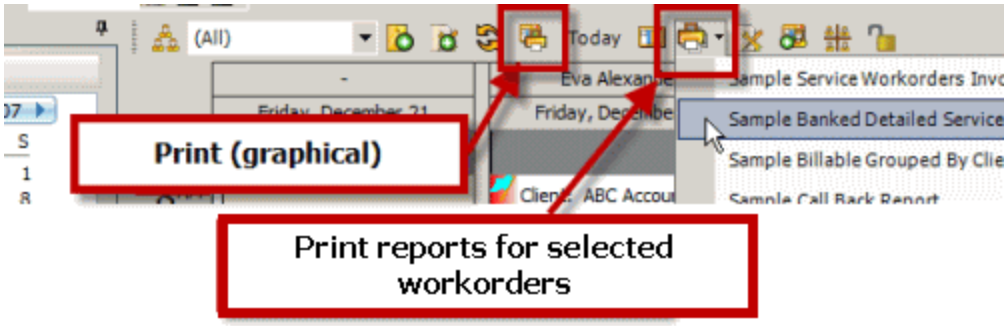
The Schedule Screen is a great tool for you to see when you are already scheduled, and schedule new items accordingly, and to view your schedules.

4.4.2 Schedule menu - Printing from Schedule Screen

The Schedule screen has **two** printing options:



Print

Select this menu option to print out a graphical view of the Schedule screen. It will first bring up the Page Setup window where you can select the Style Name:, Start Date and End Date, and time range.

See also:
Graphical printout from the Schedule Screen
How do I print out a graphical day view of the Schedule?

Print selected workorders

Select this menu option to display a list of the Service Workorder report templates.

This makes it even easier for you to view your schedule, select the workorder items you want, and print them out to go perform the service.

NOTE: this menu option only displays if you have selected one or more workorder items in the Schedule screen.

To select a specific workorder item, use your mouse to click on it. To select multiple workorder items, select the first workorder item and then hold the CTRL key down while you use your mouse to select the others.

See also:
Printing reports from the Schedule Screen

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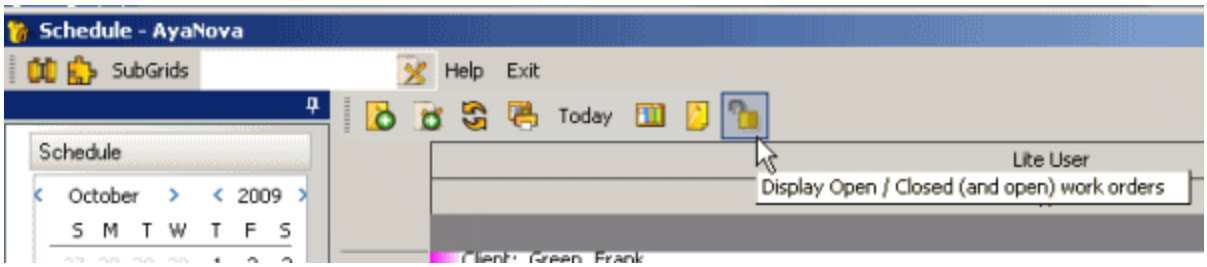
How do I print out dispatches for myself from the Schedule screen?

4.4.3 Schedule menu - Show Open and Closed or Open Only



Display Open / Closed (and open) work orders

By default the Schedule screen shows only Open workorders. As usually you are determining schedules for workorders that have not yet been completed, this is the default.

If you want to have the Schedule screen at that time show Open and Closed workorders, then select the menu option.

When you next log into AyaNova, the default of showing Open workorders will again be set.

When this menu option is showing, both Open and Closed workorder items will show on the Schedule screen

When this menu option is showing, only Open workorder items will show on the Schedule screen. By default, only the Open workorder items will show.

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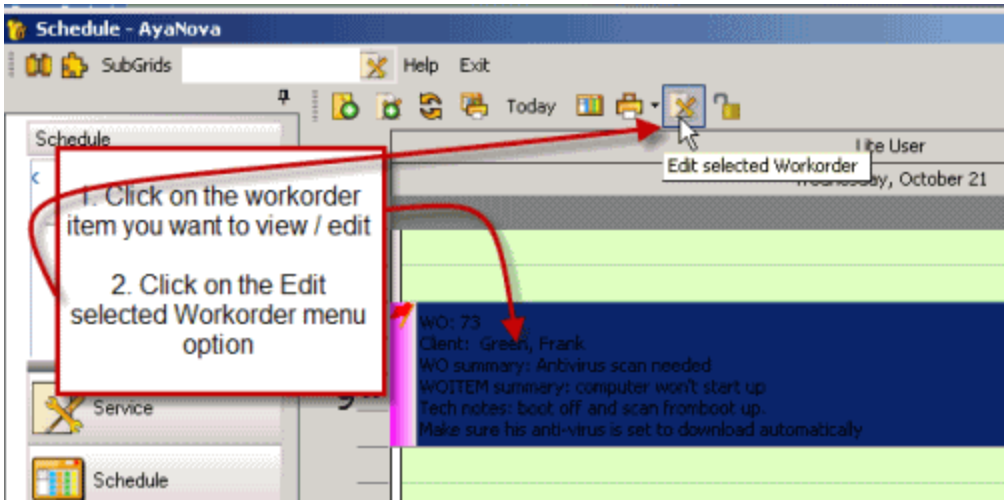
4.4.4 Schedule menu - Edit selected workorder item



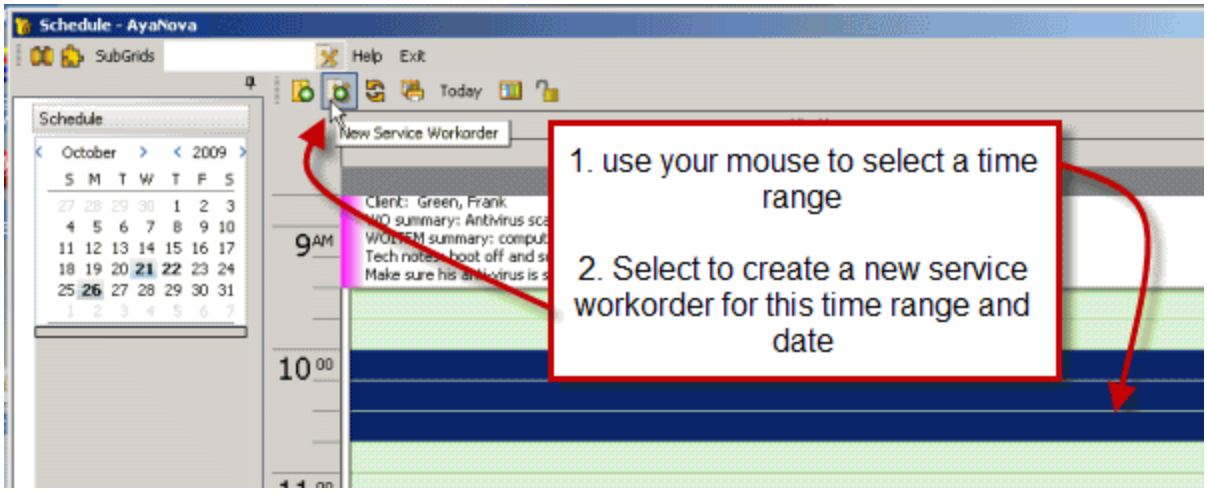
Edit selected workorder item

Selecting this Schedule screen menu option will open the last selected workorder item.

Alternatively, you can double-click on the workorder item in the screen to open it.

NOTE: This menu option will **not** appear unless an existing Workorder Item is selected on the screen

4.4.5 Schedule menu - New Service Workorder



New Service Workorder

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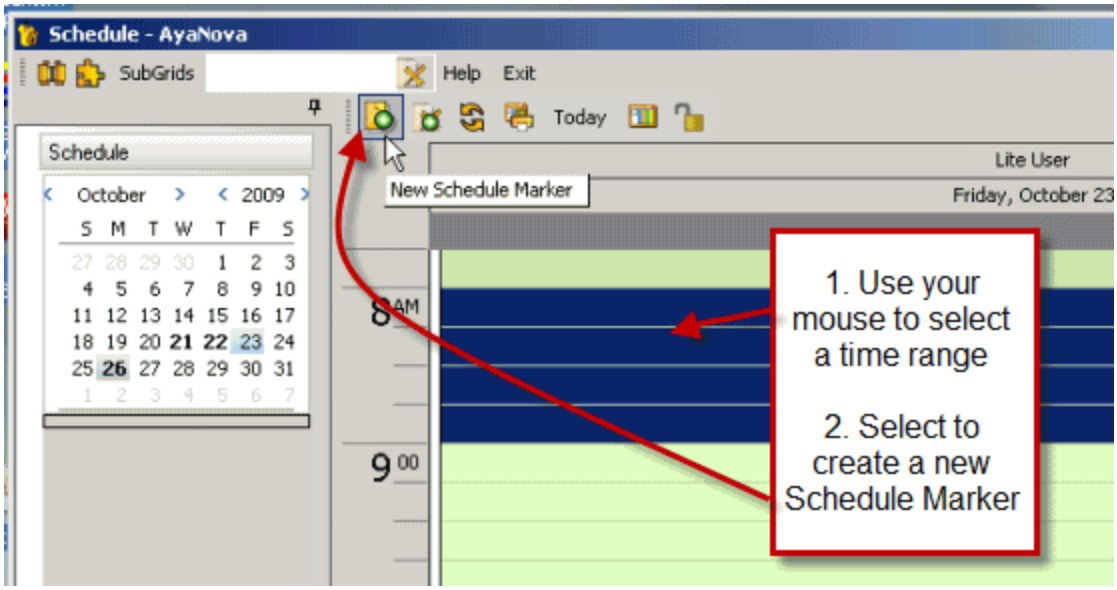
Select a time range for a specific schedulable user, and select this menu option to create a Scheduled users record in the workorder item for the specific user for that specific date and time range.

NOTE: If you do not select a specific schedulable user from the calendar (for example, you were in a month view for all users or for a group of users), the Scheduled User in the new workorder item will default to the last selected scheduled user.

4.4.6 Schedule menu - New Schedule Marker



New Schedule Marker

1. Select the date and time frame for a schedulable user within the calendar itself
2. Now select the New Schedule Marker toolbar option
3. This will open a new Schedule Marker which will have the date pre-entered, the user pre-entered, and the selected start and stop time set as well.

See also:
Schedule Markers

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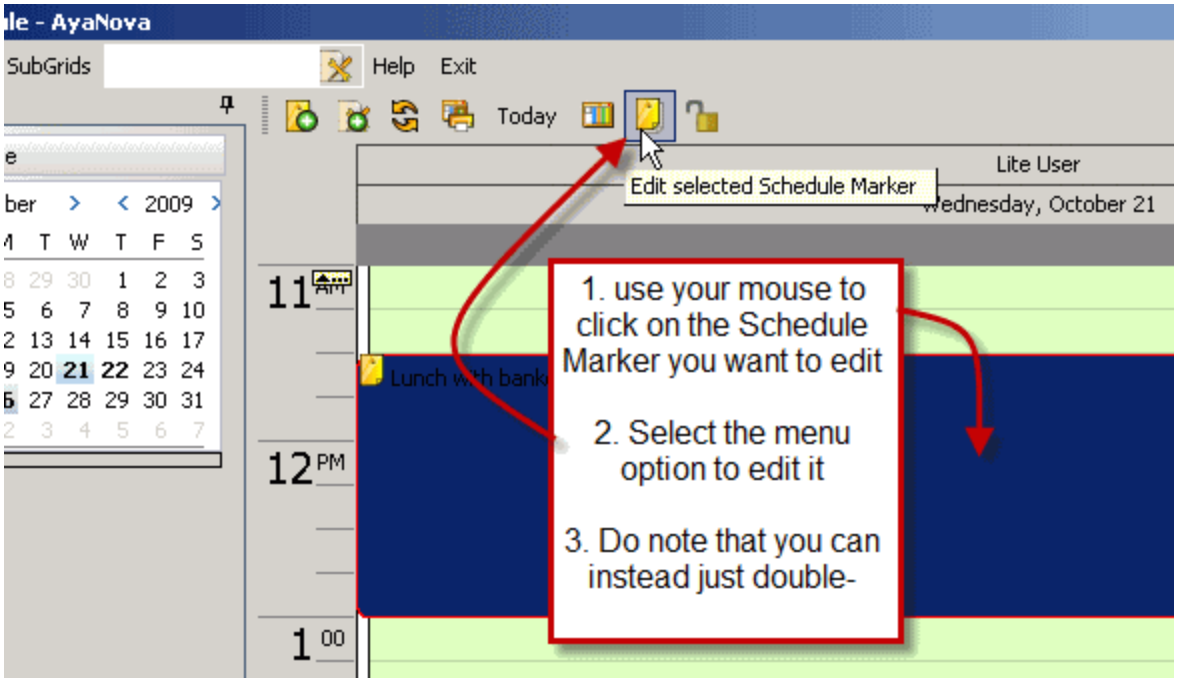
4.4.7 Schedule menu - Edit selected Schedule Marker



Edit selected Schedule Marker

Selecting this Schedule screen menu option will open the last selected schedule marker

You can of course, just double-click on the Schedule Marker to open it, just as double-clicking on a scheduled workorder item opens its workorder entry screen so that you can edit and view.

NOTE: This menu option will not appear unless an existing Schedule Marker for a schedulable user is selected on the screen

4.4.8 Schedule menu - Display single day view as time line / regular

Display single day view as time line / regular

This menu option in the Schedule screen allows you to set display items in a single day view the common style layout (vertical), or display in a time line (horizontal).

usually time line view is most useful if using the full AyaNova with a large number of schedulable users.

Below is a time line view of a day with the separated menu option

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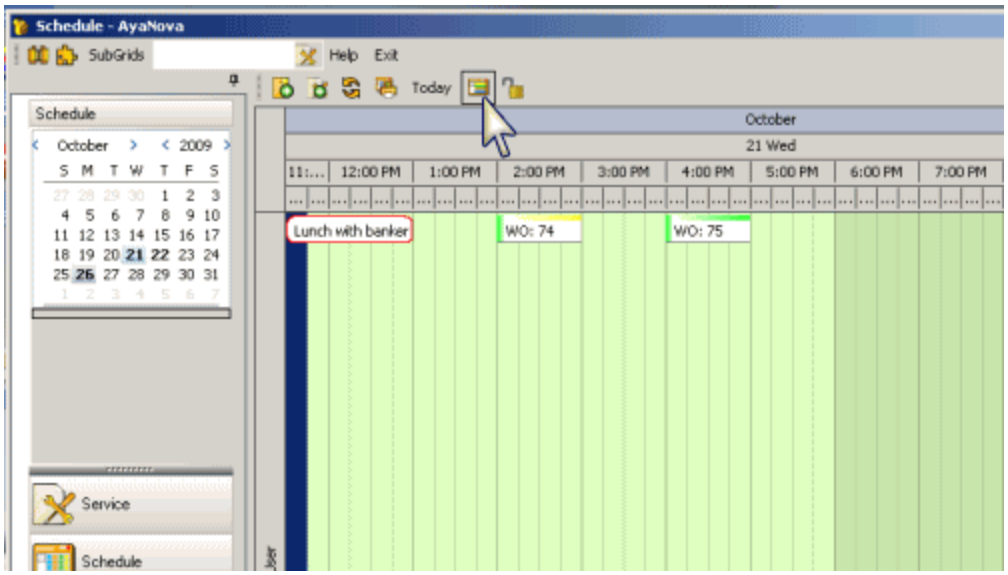
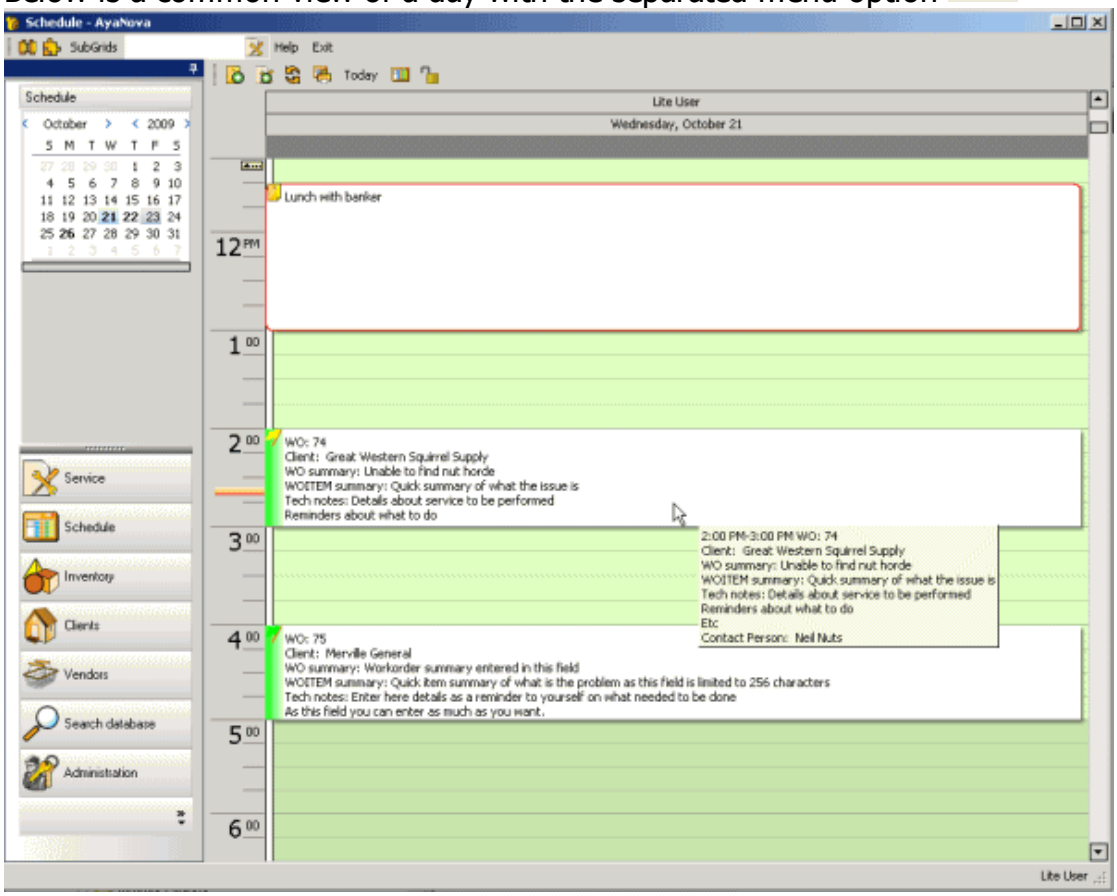


Below is a common view of a day with the separated menu option



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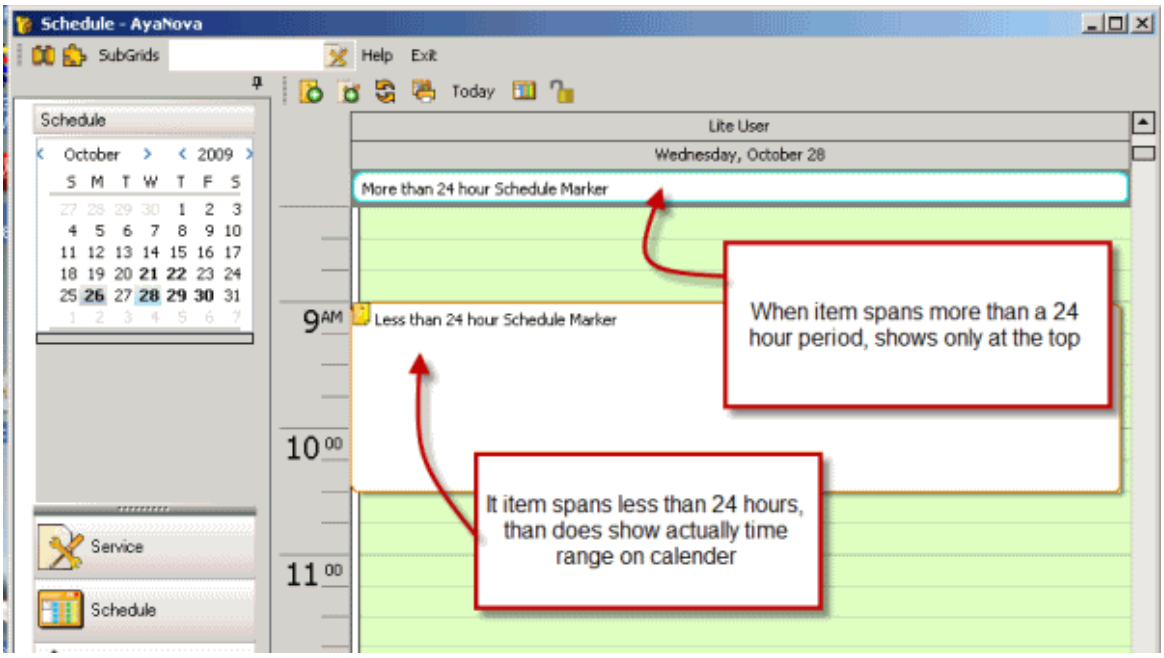
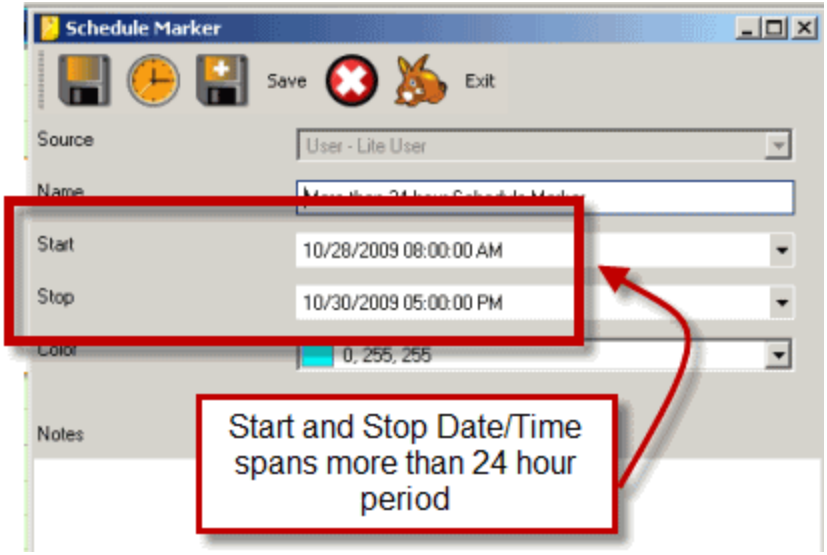
4.4.9 Schedule menu - Scheduled item that spans a full day

When a scheduled item (whether it be a service workorder item or a Schedule Marker) **spans 24 hours or more**, it will only display on the Schedule screen just at the top, denoting at a glance that it spans the entire day without overlapping everything.

When a scheduled item (whether Schedule Marker or Service Workorder Item) spans less than 24 hours, the time range shows on the Schedule screen in correspondence to the time range on the left.





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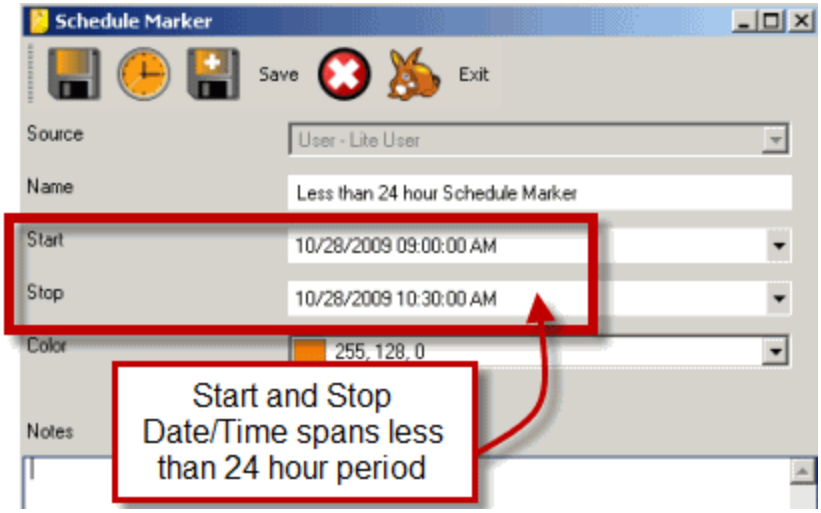

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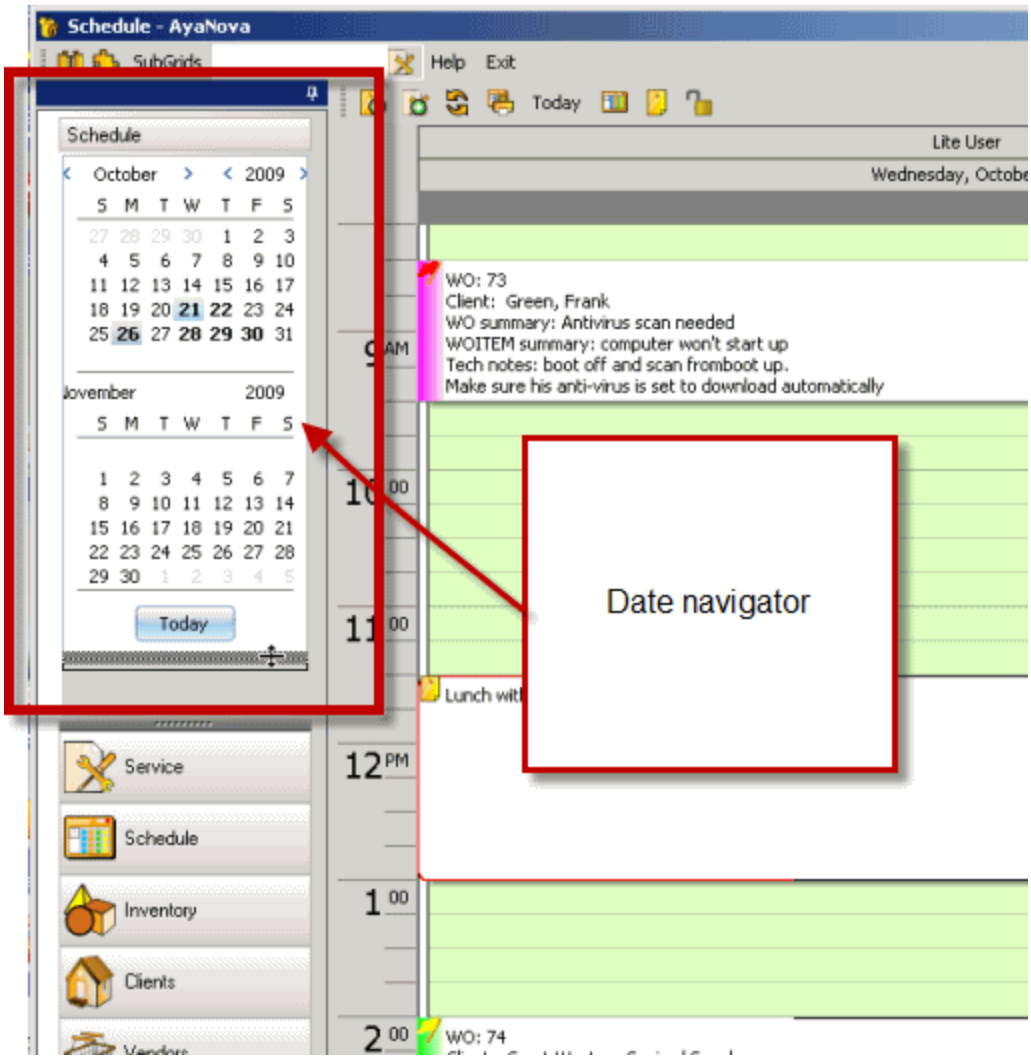
4.4.10 Schedule Screen Date Navigator



The Schedule screen date navigator is the mini calendar on the left in the Schedule screen that lets you quickly navigate to a date in the large calendar on the right. When you click a number in the date navigator, that date is displayed in the main Schedule calendar screen on the right.

The date navigator can also help orient you as to which days of the month you're viewing, the current day, and which days currently have workorder items and schedule markers.

Some tips on use:

Use the arrows to change the month and/or the year

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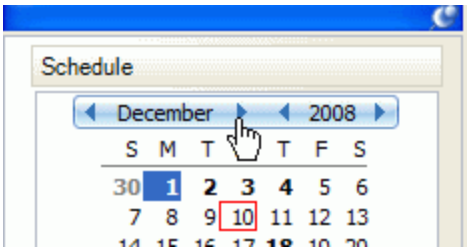
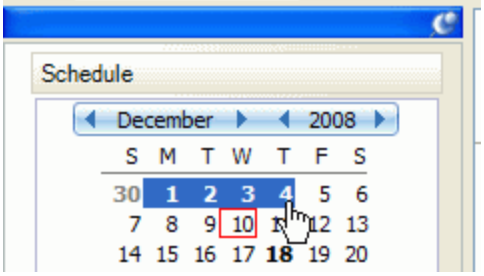
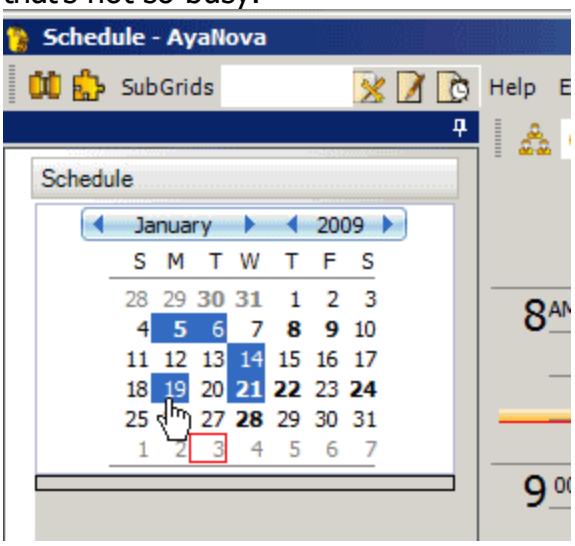


Use your mouse to select adjacent days or weeks or a whole month by clicking and dragging your mouse over the dates you want to display.



When you select a time span the scheduled items calendar to the right will **automatically** adjust to encompass the span selected by changing it's view type as appropriate. For example if you click and drag to encompass a week you will get a 7 day view, if you click a single day you will get a day view, if you click and drag to select a whole month you will get a month oriented view.

Use your mouse and **CTRL** key to display nonadjacent days - click on the first date, now hold the CTRL key on your keyboard and click on other dates. For example suppose you need to reschedule an appointment and you need to compare days with nonadjacent dates for a scheduled user. Or, maybe you want to schedule something on a Tuesday, but you want to find a Tuesday in a week that's not so busy.



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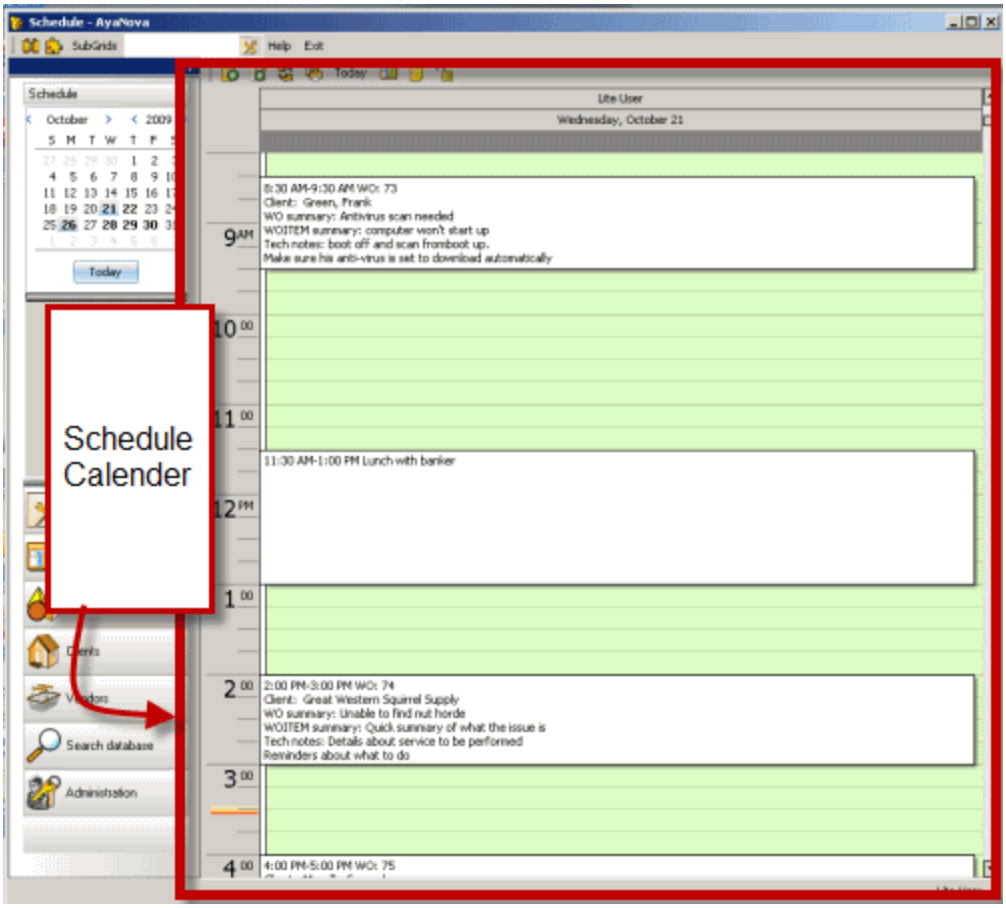
4.4.11 Schedule Calendar



This is the main calendar in the Schedule screen from which you can view information.

The Schedule screen can display two different items - Schedule Markers as well as Workorder Items

You can place your mouse over the item on the Schedule calendar to pop up a tip window providing more information.

You can edit what displays and does not display in this popup window by editing the settings in the Administration Global Settings.

See also:
Main Workorder entry screen menu options - Follow Up
Schedule Markers
Global Settings - Workorder Item Summary Template
Workorder Item Summary Template tags
Service Workorder - Schedule
How do I edit what pops up on Schedule screen for workorder item?

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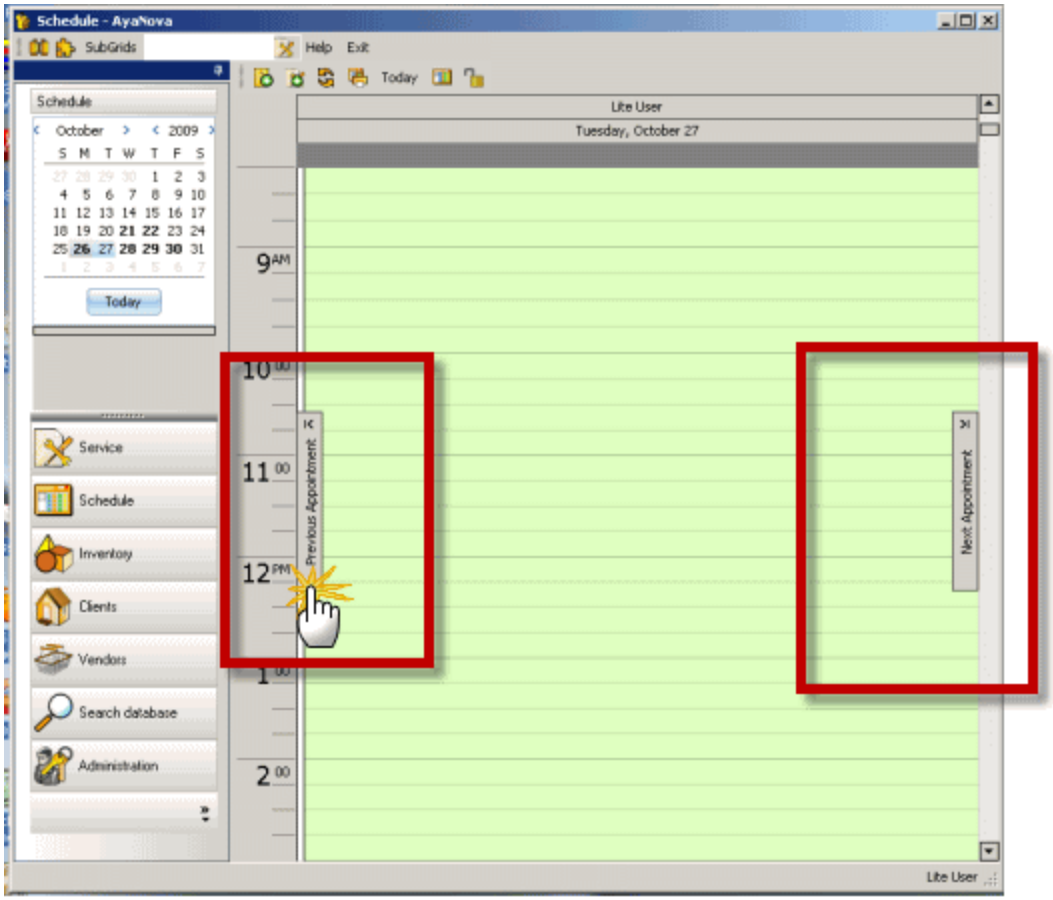
4.4.12 Next Appointment / Previous Appointment



In the screenshot above, the Previous Appointment and the Next Appointment option shows.

If you clicked on the Previous Appointment, the Schedule screen will "jump" to that date showing you what is scheduled before the date you are viewing, and if click on Next Appointment, will jump to the date after you are viewing when next scheduled.

NOTE: Next Appointment and Previous Appointment only displays if there are no scheduled workorder items and no Schedule Markers for that schedulable user for the date you are actually viewing.

NOTE: Previous Appointment and Next Appointment displays based on if the Next or Previous is within the calendar month showing on Date Navigator or within 7 days on either side of the visible calendar month.

For example, if the calendar is showing the month of October 2008 and you are presently displaying October 15 2008 on the Schedule calendar, and the technician Eva has no workorder items or schedule markers on that day, but that technician does have a Schedule Marker for September 27th and a workorder item booked for November 4th, that tech will show both Next and Previous available for selection. But

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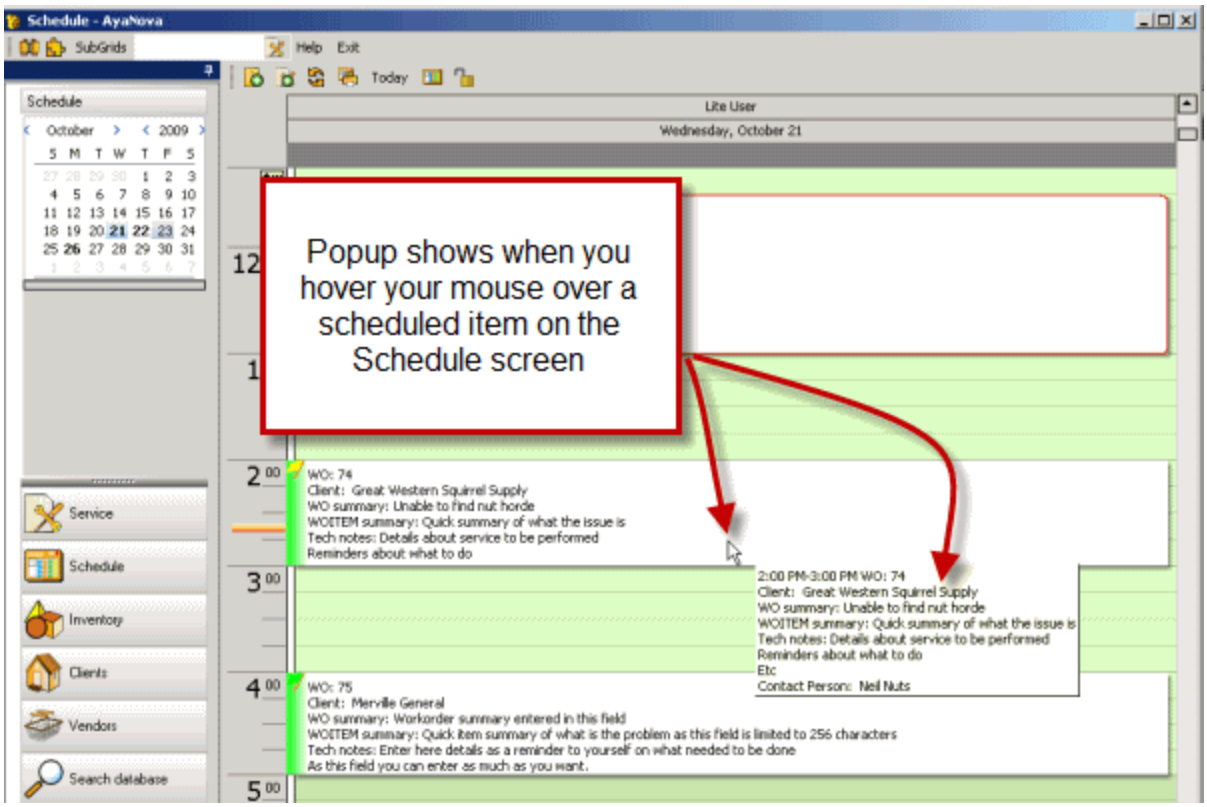
if that technician Eva's previously booked item is September 14, the Previous Appointment feature will not show as it is outside the November window plus outside of the 7 days on either side of November.

4.4.13 Workorder Item Summary Display popup



Hover your mouse cursor over a scheduled workorder item on the calendar, and AyaNova will "pop-up" a summary of what the workorder item is about.

What displays in this popup is dependant on what you have set in your Global Settings for the Workorder Item Summary Template

See Also:
How do I edit what pops up on the Schedule Screen?

4.4.14 Schedule Markers

Schedule Markers can be used to identify events that are not service workorder items - such as reminders to yourself.

Schedule Markers have the Schedule Marker image in the upper left hand corner if your screen view is large enough, and display with slightly rounded edges when viewing the Schedule screen, whereas workorder items are square.

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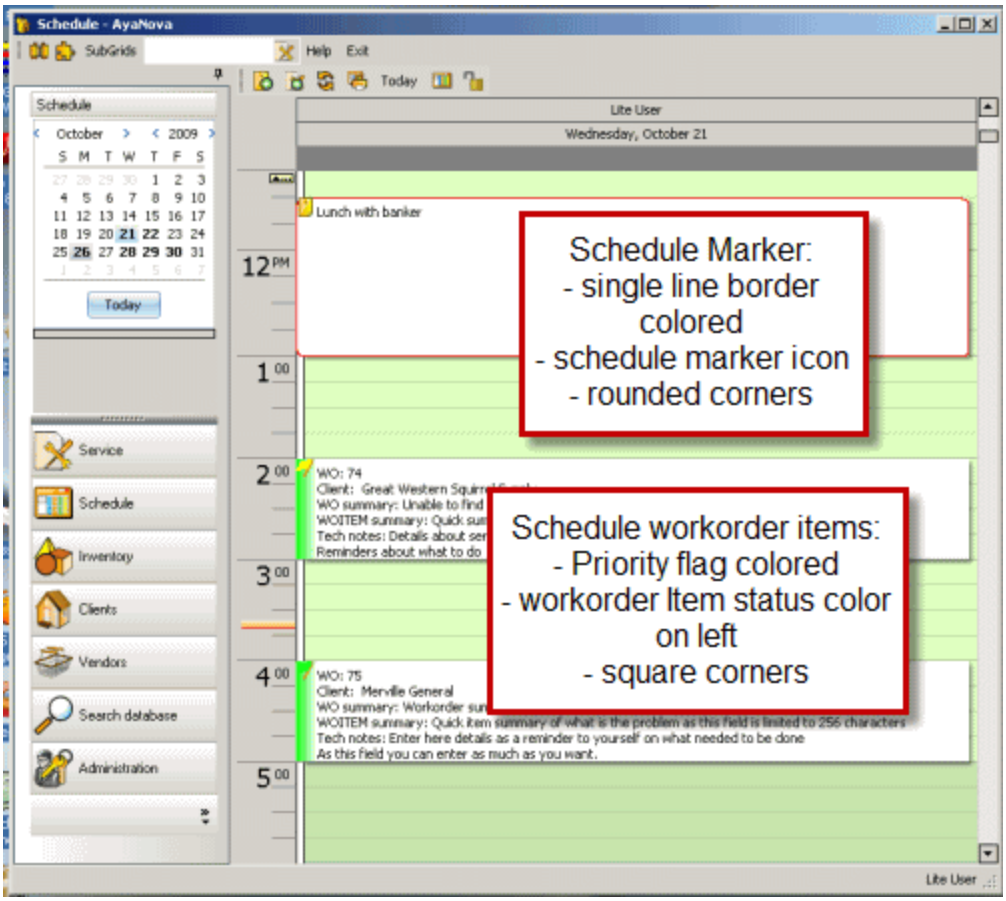

For example, you might create a schedule marker for a user that is in training and not available for service. Or you may create a schedule marker to identify a day that a schedulable user is not available due to a dentist appointment.

You can quickly create a Schedule Marker by selecting a time frame and selecting the New Schedule Marker button on the toolbar which will auto enter the date and time frame still allowing you to select for whom the Schedule Marker is for.

NOTE: Schedule Markers can also be a Follow Up for a specific workorder, or quote, PM, client or unit.

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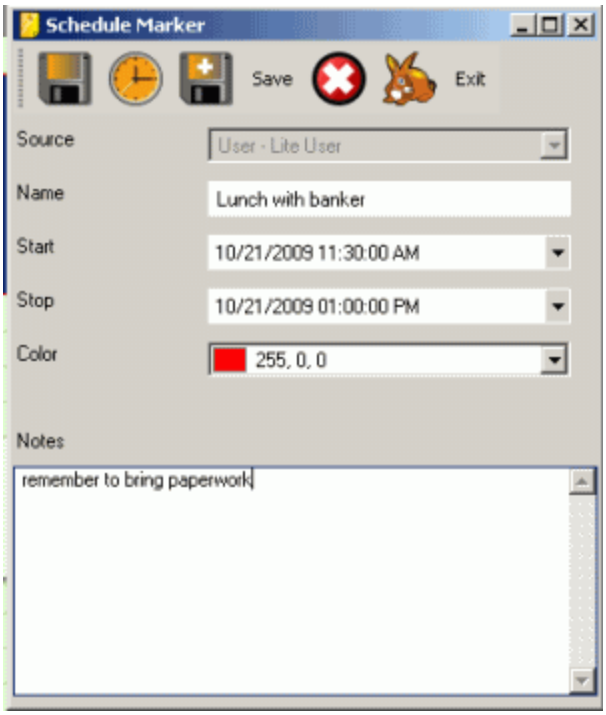

Source
The Source is grayed out for selection in AyaNovaLite as only one user.

Schedule Marker Name
This is where you enter a summary or "name" of what this schedule marker is for. This will display on the calendar if your view is large enough.

Start Date & Time
This is where you select the start date and time of the schedule marker unless you had pre-selected on the Schedule screen's specific day.

Stop Date & Time
This is where you select the stop date and time of the schedule marker unless you had pre-selected on the Schedule screen's specific day.

Color
This is where you select what color you want the schedule marker to display as in the Schedule screen. You can leave this blank for none.

Notes
This is where you can enter additional information pertaining to the schedule marker.

See also:
New Schedule Marker
How do I duplicate a Schedule Marker?
Main Workorder entry screen menu options - Follow Up

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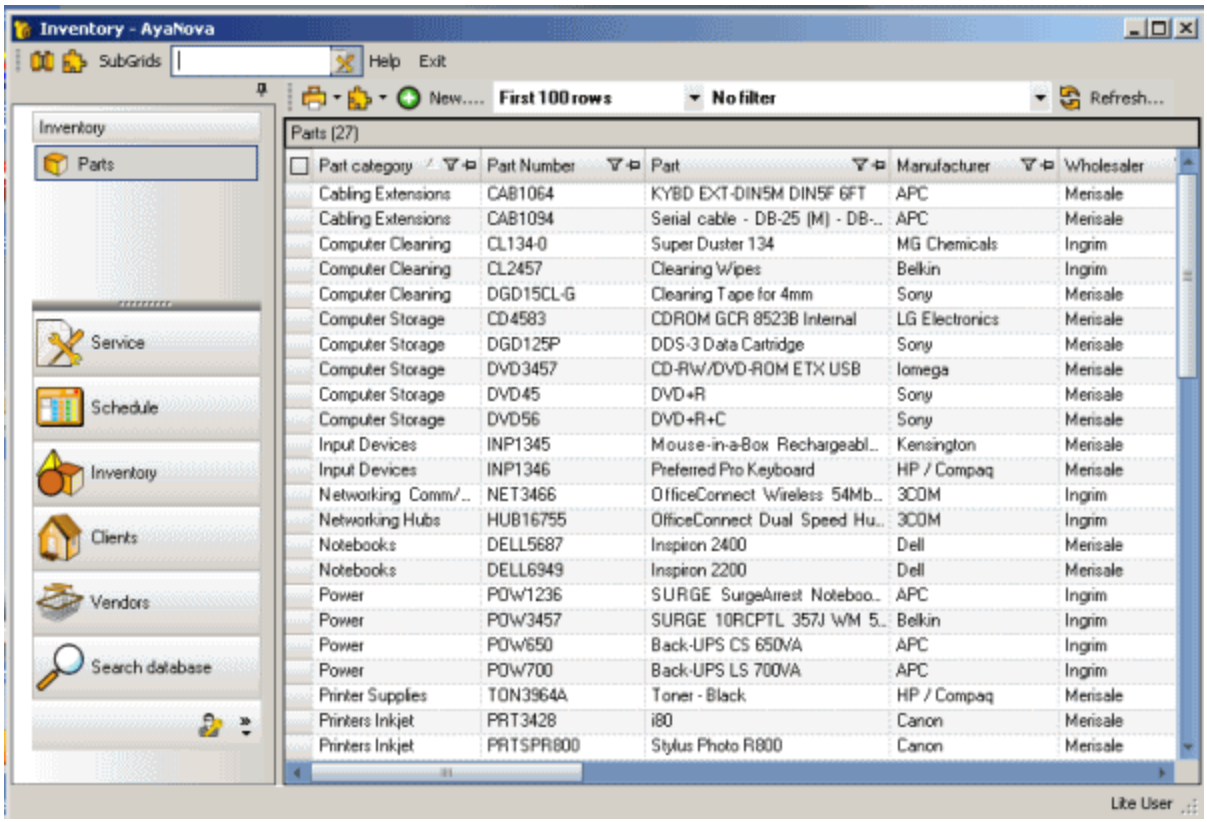
4.5 Inventory - Parts

4.5.1 What are Parts for?



A "Part" is a description of an item that you want to type in once, so that you can easily select it within a workorder

> **NOTE**: A Part is **not** the quantity in stock or on order. Part is information about the part in general - its number, name, vendor, price, cost etc.
>
> AyaNova Lite **does not** include an inventory feature - it does not track on hand quantity, quantity on order, etc. The full AyaNova does include the full inventory feature including purchase orders, receiving, part requests, and more.
>
> **NOTE**: Do not import or enter parts unless you actually will use the part. The parts list is loaded whenever a workorder is opened, so if you have for example 30,000 parts do note that large number will affect how long it will take to view a workorder entry screen

See also:

[Parts grid]
[Part entry screen]

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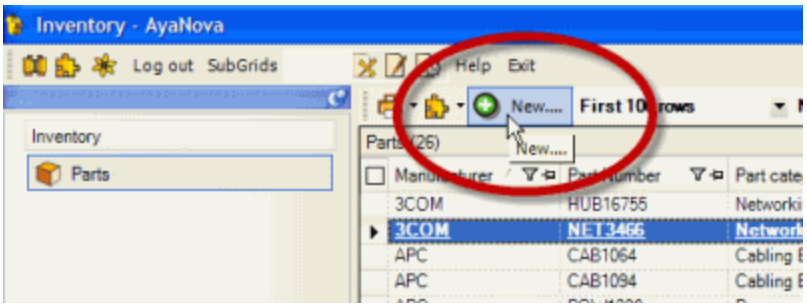
4.5.2 Parts grid

Parts are created by using the New.... New... menu option on the Parts grid



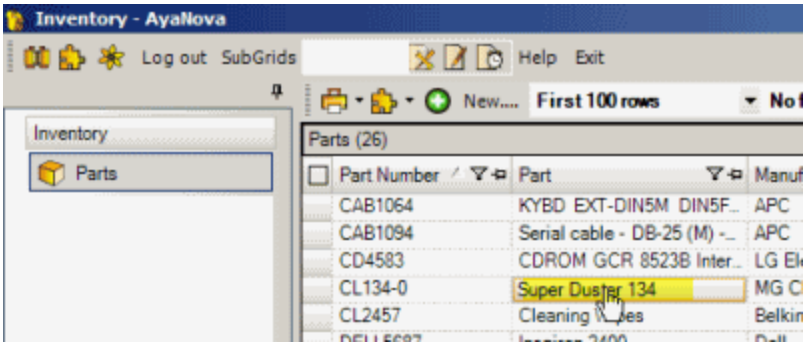
Or create a new part by selecting the Accelerator Keys combination ALT-p when viewing any main grid.

Or create a part while within a service workorder on the fly

Or import parts using the Part Import/Export utility

Or import parts from your QuickBooks or Peachtree accounting program using the accounting optional add-on QBI or PTI. Please refer to the Help files for the optional add-on you are using.

View an existing Part by selecting the Part Number or Part Name in the part grid



The Parts grid displays columns regarding the part itself, and records for each part entered.

This grid does **not** display other columns referring to inventory of the part, nor what workorders selected in, etc. This grid only displays columns from the Part entry screen

Note that you can also localize labels to display whatever text you want - see also: Localize field labels

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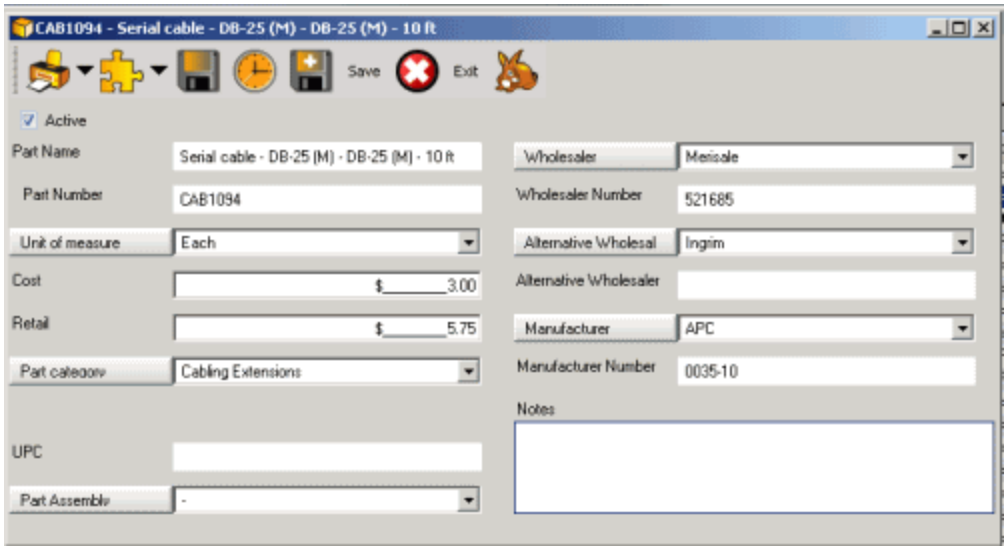
And you can set what columns you want to display in the grid - see also: Setting what columns display in a grid

Part	Displays the Part name	Select to open the part entry screen
Part Number	Displays the Part number	Select to open the part entry screen
Part Category		Select to open the Part Categories subgrid
Manufacturer		Select to open the Vendor's entry screen
Wholesaler		Select to open the Vendor's entry screen
Alternative Wholesaler		Select to open the Vendor's entry screen
Unit of Measure		Select to open the Unit of Measure subgrid
UPC		
Manufacturer Number		
Wholesaler Number		
Alternative Wholesaler Number		
Cost		
Retail		
Active		

4.5.3 Part entry screen



Part entry screen fields:

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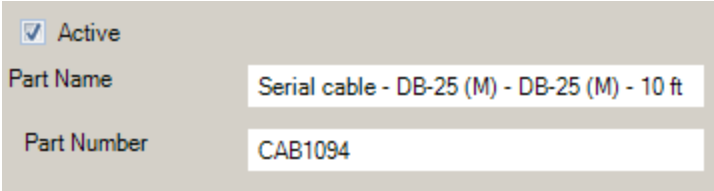


Active

If checked, this part will appear in the Parts grid screen, and be listed in Parts drop down selection lists such as in Service Workorder, Purchase Orders etc

If unchecked, this part will only appear in the Parts grid screen and would not be available for selection elsewhere

If you no longer want a part to be available for selection, un-check the Active field and save.

If the part was mistakenly created and no inventory has been set for it, no PO's made for it, no selection in any other AyaNova object - then you can delete it via the Delete menu option.

Part Name

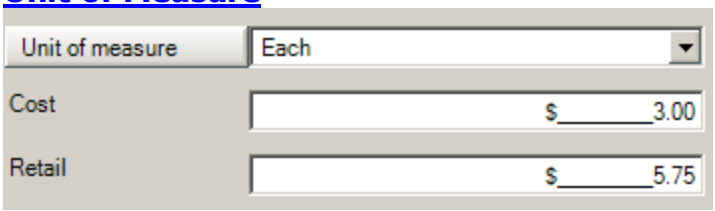
A short description of the part displayed for selection from drop down lists, handy when part numbers are not easily descriptive. Keep it short and in a format that the customer and AyaNova users can understand.

Part Number

This is a required field.

Usually the number used in your point of sale or accounting software. If you plan to integrate AyaNova with accounting software in future, or you presently integrate by entering invoices manually, you should be careful to enter part numbers exactly in the same format used in your accounting or point of sale software.

Unit of Measure



Identify the measure of the part - i.e. "each", "box", "case", "dozen", "gallon", "feet", "meter" etc

Cost

The currency amount you enter here will be available to the Service Workorders, Quotes and PM's where this part is selected.

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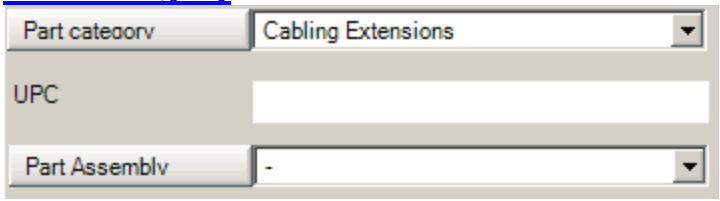
Retail

The currency amount you enter here will show as the retail price in Service Workorders, Quotes and PM's where this part is selected. Do note that you can edit the amount in a service workorder, quote or PM if needed.

Part Category



A way of grouping parts together for filtering or reporting on.

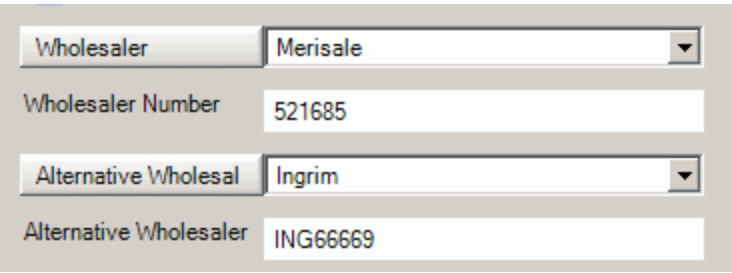
UPC

Entering the UPC code here will allow ease of use elsewhere in AyaNova. For example, if users are entering Parts in a Service Work order, they can select the UPC field and scan in the part using a bar code scanner which will automatically select the appropriate part. This adds up to saved time and less mistakes in entry.

Part Assembly

A way of grouping parts together for filtering and/or reporting.

Wholesaler



From whom you purchase the Part from. This may also be referred to as a distributor and as with all text you see in AyaNova you can change the localized text from Wholesaler to Distributor easily if necessary.

For a part to be ordered via a purchase order for that vendor, it **must** have that vendor selected as either the Wholesaler or the Alternative Wholesaler.

Setting this also allows you to take advantage of the Restock By Vendor feature in a purchase order where by setting the wholesaler for the part, you can obtain a list of all parts that are below the Minimum Stock Level and easily order without having to do a manual inventory count of what is needed to be ordered.

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The drop down lists all available Vendors set as Wholesalers that a Part could potentially be associated with.

If the Wholesaler is not in the drop down list and no Wholesaler has been selected, then with the drop down selection list blank, click on the Wholesaler button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Wholesaler is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Wholesaler button.

Setting the wholesaler allows you to use the time saving list of items that need to be reordered based on wholesaler and minimum stock level via the purchase order. This allows you to maintain optimum stock levels and keep your techs and customers happy.

Wholesaler Number

Number used by the Wholesaler in reference to this part. Provided here as may be different than your part number, allowing you to easily order by the Wholesaler number from within a Purchase Order

Alternative Wholesaler

Second distributor that part may be purchased from.

For a part to be ordered via a purchase order for that vendor, it must have that vendor selected as either the Wholesaler or the Alternative Wholesaler.

The drop down lists all available Vendors set as Wholesalers that a Part could potentially be associated with.

If the Wholesaler is not in the drop down list and no Wholesaler has been selected, then with the drop down selection list blank, click on the Wholesaler ID button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Wholesaler is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Wholesaler ID button.

Alternative Wholesaler Number

Number used by the Alternative Wholesaler.

Manufacturer

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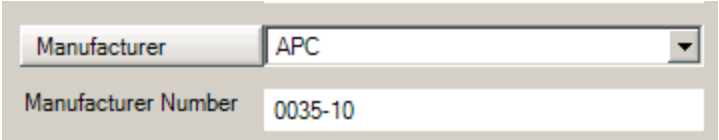

This would be who makes the part. This is another way of grouping parts.

The drop down lists all available Vendors set as Manufacturer that a Part could potentially be associated with.

If the Manufacturer is not in the drop down list and no Manufacturer has been selected, then with the drop down selection list blank, click on the Manufacturer button to open up a new Vendor entry screen so that you can enter the Vendor details, save, close and then select it from this list.

Or if the Manufacturer is selected from the drop down list, you can open up the Vendor entry screen displaying that Vendor information by clicking on the Manufacturer button.

Manufacturer Number

This is the number used by the Manufacturer and is another way of identifying the part.

Notes

This is where you can enter additional notes about this part if needed.

See also:
Common entry screen menu options
Localize field labels

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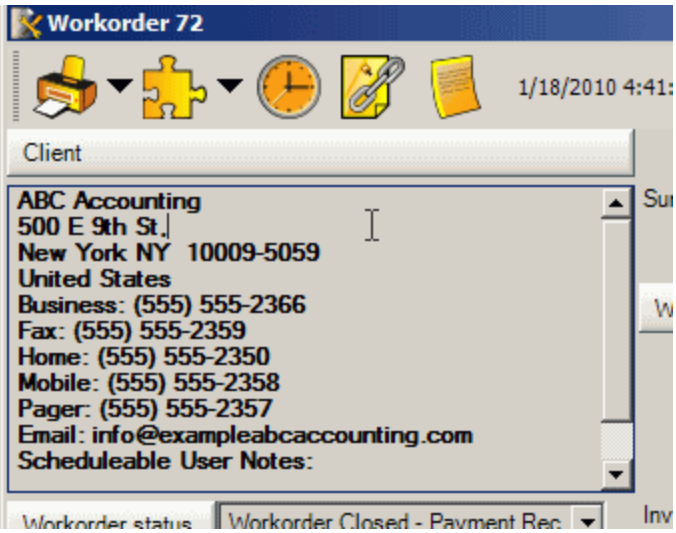
4.6 Clients

4.6.1 What do I use a Client for?



Clients are who you are performing service for.

A client may be a company, a client may be an individual, a client may even be a bus. What you use "Client" as in AyaNova would depend on whom or who service is performed for in your service industry.

Examples:

Property management service - each "Client" equates to an apartment. And areas of the apartment (living room, kitchen, etc) and/or equipment in the condo such as dishwasher, bathtub, etc is identified as a "Unit". And "Head Office" equates to the entire building or owner of that building for billing purposes. This way when you create a service workorder for the apartment (i.e. Client) and also can identify the specific equipment or room (i.e. Unit in the apartment) that requires service and maintain service history on it.

Computer service - each "Client" equates to a customer that you provide computer service to. And each computer equipment owned by that client is identified as a "Unit".

NOTE: AyaNovaLite does not provide tracking of Units service history or selection in service workorders - please refer to the full AyaNova version.

How to create a client

1. Via the New...

menu option in the Client grid

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2. Via the Client jump button within another entry's screen

   For example: in the Client selection window when creating a new workorder, click on the Client jump button with no client selected, and a new client entry screen will display for you to enter a new client.

   See also: Jump Buttons

3. Import via the Client Import/export utility

   Client's information is entered once via the Client entry screen. When a service work order is needed for a client, you only have to select the client from the drop down selection list without having to re-entry information.

   A history of all service workorders that are associated with a single client is therefore maintained.

AyaNova can be localized to display field label text in any language - for example, you may want what is labeled as "Clients" to be labeled as "Apartment" or "Employee" etc - whatever makes the easiest use for your type of service

See also for more details:
Localized Text Designer

4.6.2 Clients grid

The Clients grid screen lists clients in grid format. This grid format makes it very easy to filter, group and sort for ease of selection, as well as access the client entry information.

From the Clients grid you can:

- Create a new client via the New...

menu option

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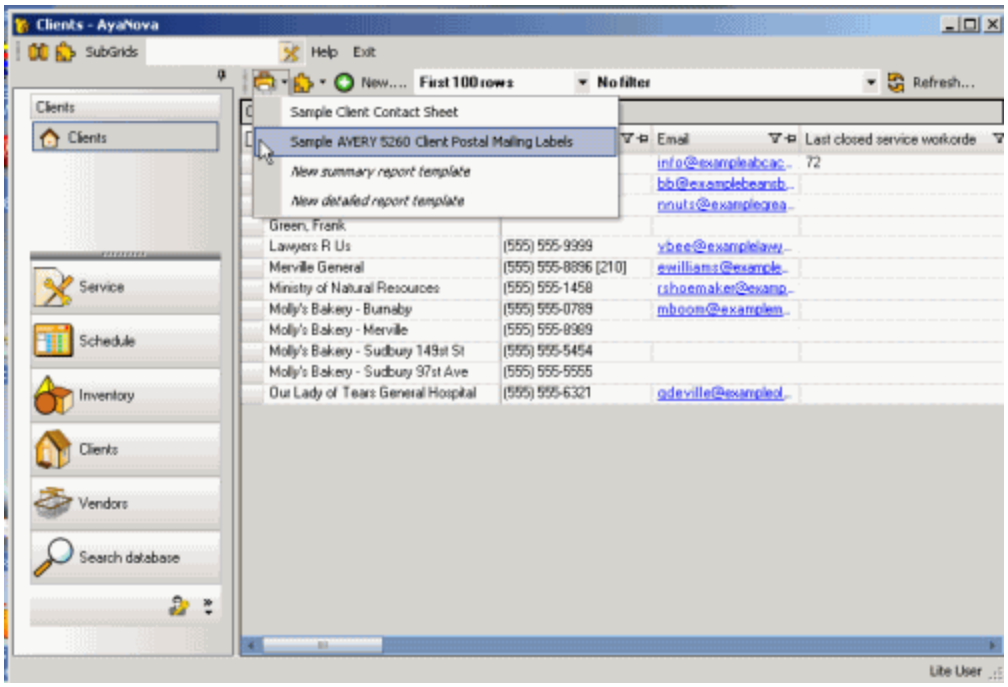
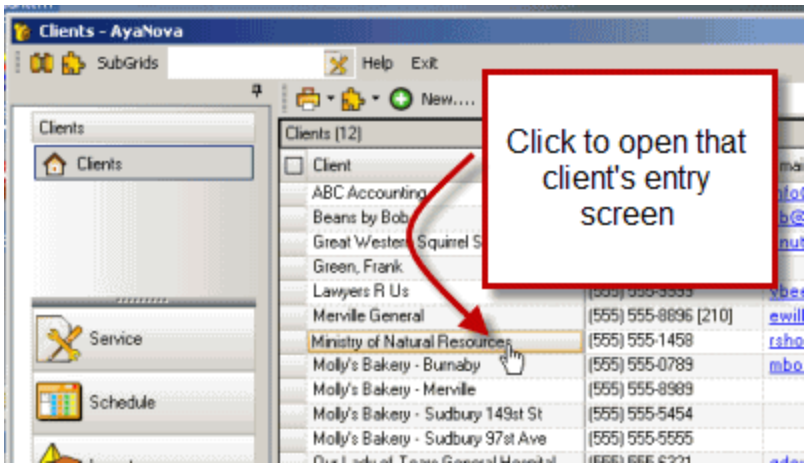
- Print reports on client data that is available from its entry screen and the Clients grid



- Open up a Client entry screen of a client by clicking on the client listed in the Client column.



- Create a new work order for that client by right-clicking on the client name under the Client column; or list all workorders for this client; or create a new client note for that client.

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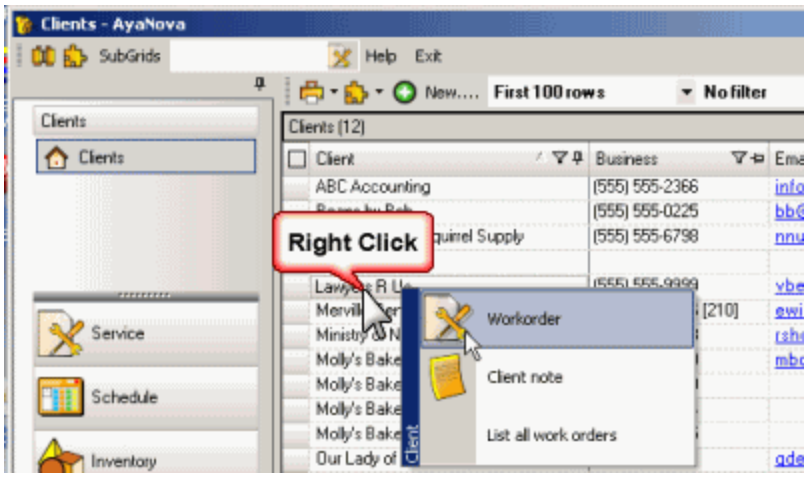
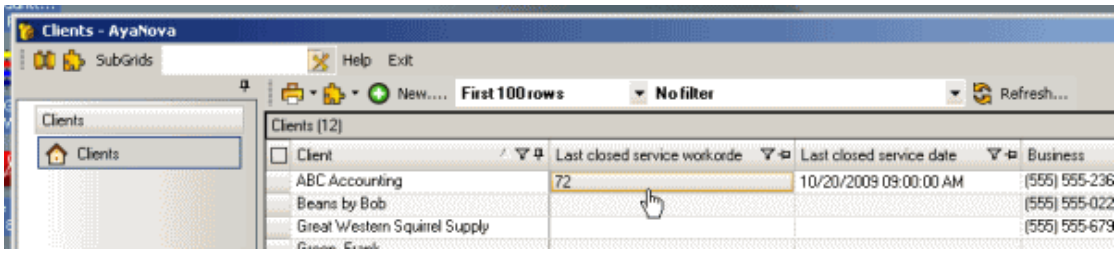
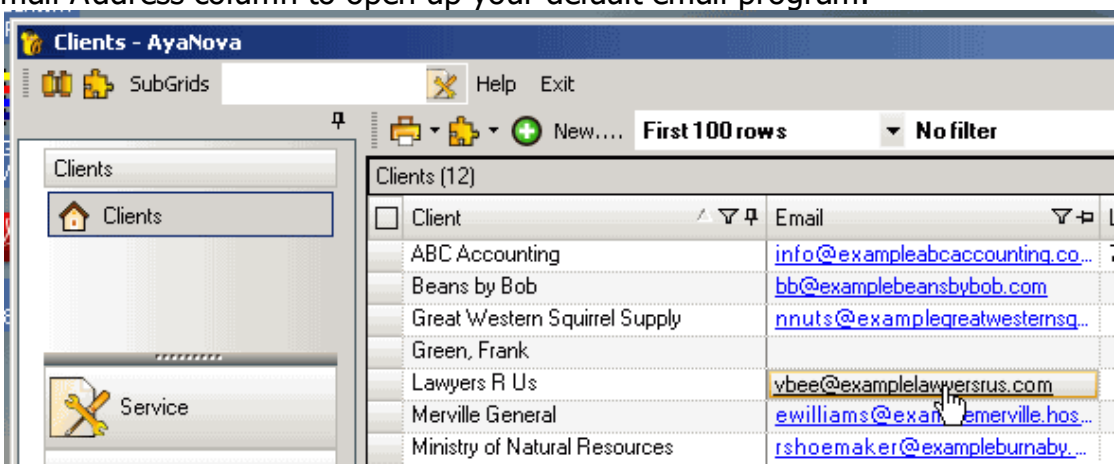


- Quickly view the last closed workorder for each client and that closed workorders service date.



- Send an external email to a client by selecting the email address under the Email Address column to open up your default email program.



- Open the web site of the client by clicking on the website address to automatically open up your web browser to that URL

- Run either of the optional accounting programs QBI or PTI via the Plug in menu option.

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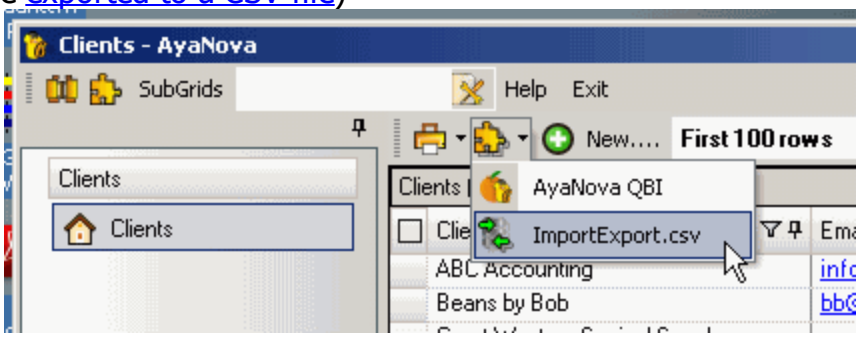
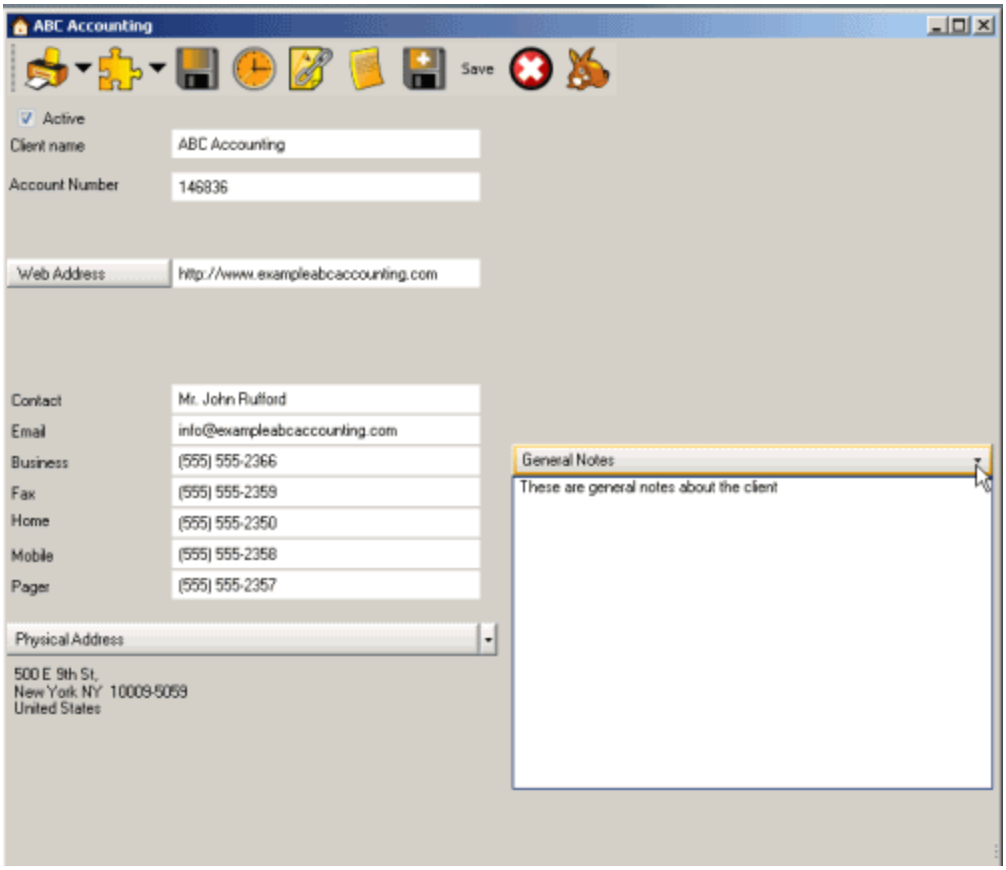
- Export the selected client records to a CSV file (or don't select any, and all will be exported to a CSV file)



See also:
Filtering a grid
Moving and sorting columns in a grid
Setting what columns display in a grid
Listing all workorders for a specific client

4.6.3 Clients entry screen



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NOTE: Fields not used in AyaNovaLite compared to the regular full AyaNova have been removed from showing, which is why there appears to be gaps between field placement on the entry screen.

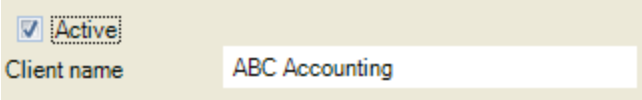
Client Note menu option

This opens up the Client Note grid screen where you can enter notes pertaining to that client selected within this workorder. Client Notes are accessible from the client entry screen's menu options as well as from any workorder for that client for entry and viewing only - there is no print ability for Client Notes.

See also for more details:
Common entry screen menu options

Fields of the client entry screen

Active



If unchecked, client will appear only in Client grid screen, and not be listed in Client drop down selection lists any new service work orders, preventive maintenance, quotes or as a unit owner.

Client Name

This is a text field where you enter the name you want to give the client. This field is used to fill any list in AyaNova where you need to select a client and be identified in any Client column.

If the client is not a company, then typically you would type the last name followed by a comma, a space and then the first name like this: Smith, Joe.

Client names should be unique so that they can easily be selected from drop-down selection lists without having to open the Client entry screen to determine which client name is the one you want.

Unique names are not required but are recommended so they are easy to select from the Clients drop down list.

If you have branches of the same company with the same name to enter, we recommend you append to their name something descriptive so you can tell them apart when selecting them for work orders.

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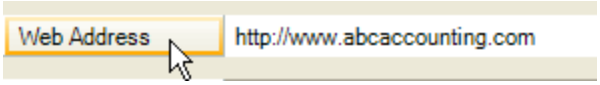
For example you could append the company name with the street name or city name or country or branch number if the client numbers their branches. For example: "First national bank #102", "First national bank #343" etc.

Because it's necessary to select a client very often in AyaNova you should enter client names here in a way that takes full advantage of the client list selection auto-select shortcut feature. This feature allows you to type the first few characters of a client's name to select them so the first part of the name should be the most distinctive.

Account Number
The account number for your client may be obtained from your accounting software, and is another way of identifying your client in reports or via the Clients grid. This is a text field only and not tied to any particular accounting feature.

Website



If you click on the Website button to the left, it will open up your computers default web browser to that entered URL address. Entering the client's web address also allows you to easily select it from the Client grid if this is a need in your service.

Contact
Suggestion is to enter the first and last name of the main contact for this client in this field.

When a new workorder is created for this client, as a helpful function, the contents of this field is transferred to the Contact field in the workorder.

Email
When entered, you can click on the email address right from the client's grid to open up a new message using your default email program

Refer to the AyaNova Support Forum http://forum.ayanova.com section Printing & Report Templates for additional sample report templates including those related for use with the client's email address.

Business, Fax, Home, Mobile, Pager
Enter appropriate phone numbers where indicated. These fields will be available in a detailed workorder report template.

Postal Address and Physical Address

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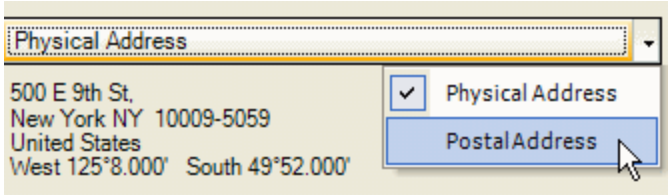


The Postal Address is the address where the client receives mail. The Physical Address is where they receive deliveries or where service is performed; where they are physically.

You can switch between these two addresses by clicking on the drop down arrow to display, and then clicking on either the Postal Address or Physical Address.

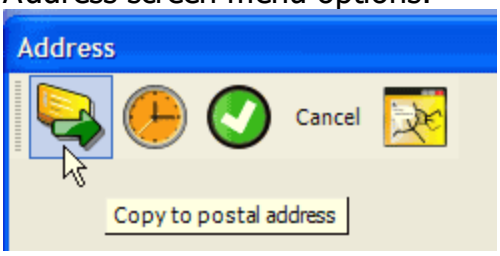
If presently viewing the Physical Address, the label Physical Address will have a checkmark beside it and be labeled in the button.

If presently viewing the Postal Address, the label Postal Address will have a checkmark beside it, and be labeled in the button.

The Physical Address defaults to showing as AyaNova is mostly concerned with where service is performed, and the physical address displays in the Clients grid, and within Service workorders, quotes and PM's.

To edit the type of address, click on the button to bring up the Address entry screen.

Address screen menu options:



If viewing the Physical Address – the menu option will be **Copy to the postal address**. If viewing the Postal Address – this would be **Copy to the physical address** menu option. Makes it easier then having to enter twice, especially if the mailing address is exactly the same as the physical address where service is performed.

Once you have entered data, click once on the OK button to accept the entered information and close the screen.

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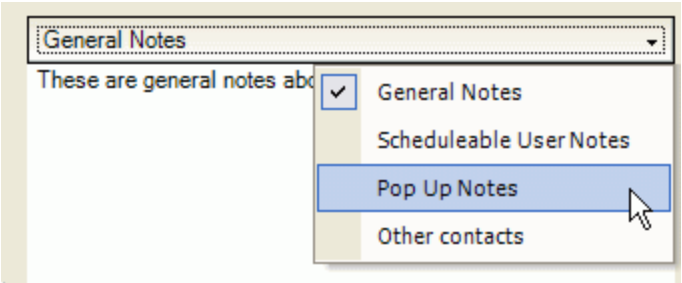
Select the Record History button to display history regarding the user that created or last modified this record. Do note that only history of saved information is displayed. If you have not yet closed the screen which saves it, you as a user and the date will not yet display.

This opens your default Internet browser to MapQuest where the entered address is automatically entered so you can view on a map. Extended mapping capabilities are on the To Do list for future releases of AyaNova

Note that if it was a Postal Address that was opened, that the Latitude and Longitude fields are grayed out. This is because Latitude and Longitude are physical attributes and only are available to display when the Physical Address button is selected. Use of Latitude and Longitude are on the To Do list for future features of AyaNova integrating with other mapping software.

Enter Latitude and Longitude fields using the apostrophe key on your keyboard. For example, if South 49°52.000' you would type in 49’52.000 and then tab off.

General Notes



These might be general information about the client that you wish to maintain with the client record.

Note that if you are viewing the General Notes the label General Notes will display on the button, as well as the drop down will show a checkmark next to General Notes.

Schedulable User Notes

If you have standing instructions for scheduled users that perform service for this client, you may wish to enter them here rather than re-entering in every service workorder for this client.

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The Scheduled User Notes will display along with the client name, address and contact information in the service workorder entry screen and is selectable within Detailed format report templates.

Note that if you are viewing the Schedulable User Notes the label Schedulable User Notes will display on the button, as well as the drop down will show a checkmark next to Schedulable User Notes.

Popup Notes
Popup notes automatically "popup" whenever a service workorder for this client is opened whether a new service workorder, or viewing an existing service workorder.

A example of use would be the accounting department wants to indicate to dispatch when taking any service requests to remind the client about outstanding payments. As the popup will popup when the dispatch creates a new service workorder, this reminds the dispatch right then to talk with the client about this.

Other Contacts
Enter additional contacts information in this text box.

Fields from the Client entry screen that are available in a detailed service workorder report template

- Account Number
- Postal Address, City, StateProv, Country, PostalCode
- Physical Address, City, StateProv, Country, PostalCode, Latitude, Longitude
- Client Name
- Client Contact
- Email, Business, Fax, Home, Mobile, Pager
- Other Contacts
- Schedulable User Notes

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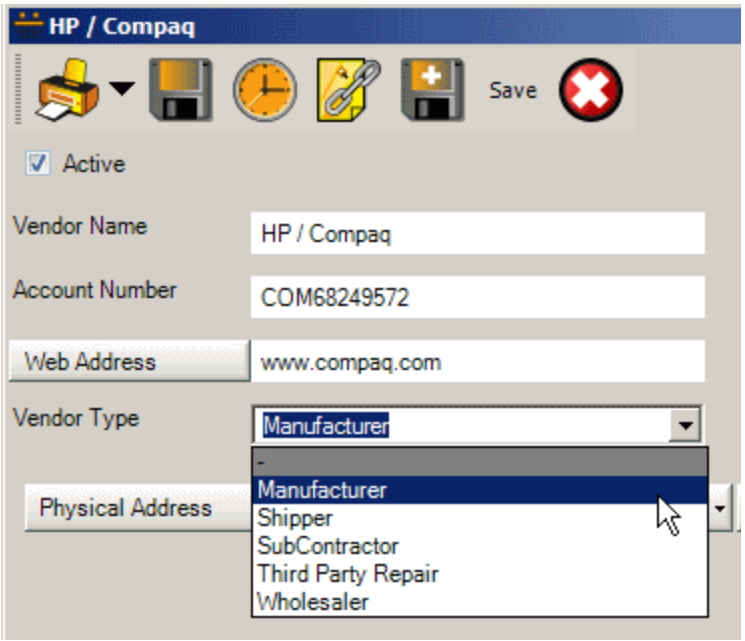
4.7 Vendors



There are five pre-set types of vendors:

1. Manufacturers refer to those that create the Parts or may be to whom you ship units to for outside service. For example, Samsung is a manufacturer of the computer monitor model SyncMaster 711T. Manufacturers are selected in Part entry screen, Outside Service sub-section of workorder entry screens and in Unit Model entry screen.

2. Wholesalers refer to those where you can purchase a number of different Parts at less than retail price. For example, Ingram is a wholesaler of computer related parts. Wholesalers are selected in Part entry screens and Unit entry screens.

3. Shippers refer to those with whom you ship or receive through. You may also receive tracking numbers for your shipments. For example, FedEx is a shipper. Shippers are selected in Outside Service sub-section of workorder entry screens

4. Subcontractors may be those that you send units to that need repair. Subcontractors are selected in the Outside Service sub-section of workorder entry screens.

5. Third party repair centers refer to where you may send warranty repairs. Third party repair centers are selected in the Outside Service sub-section of workorder entry screens.

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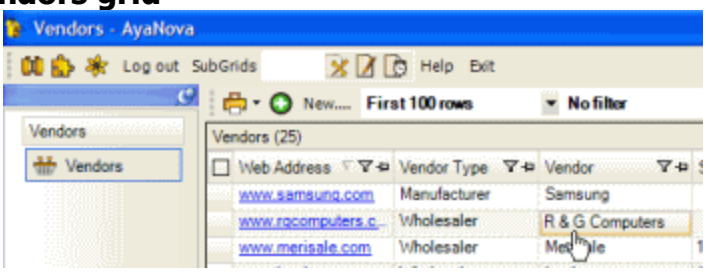
Although these different vendor types won't be used in AyaNova Lite, they are set up if and when you upgrade to the full AyaNova and take advantage of its many additional features.

Vendors grid

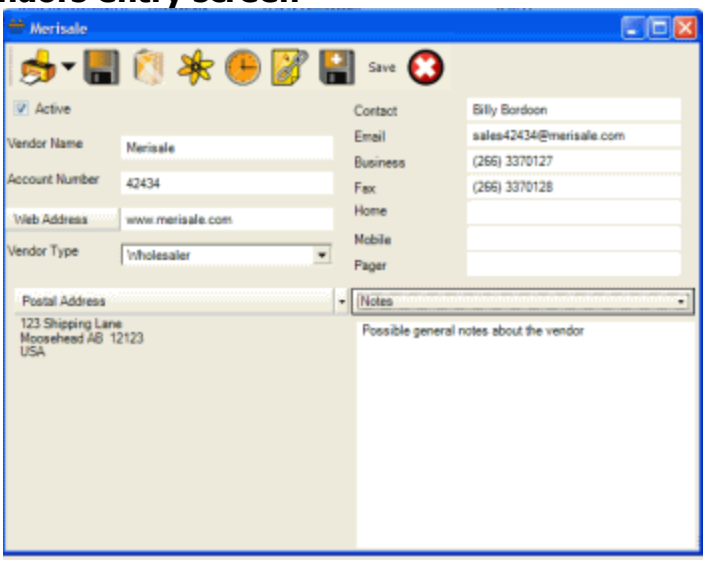


To open an existing Vendor, select the vendor's name in the Vendor column

To create a new Vendor, select the

menu option to open an new empty Vendor entry screen

Vendors entry screen



Active

If checked, this indicates that this vendor will be displayed in drop down selection lists appropriate to its vendor type.

It is not recommended to delete an inactive Vendor. If a vendor is no longer in business or no longer used, you should make the vendor inactive by un-checking it so that any history associated with it is maintained.

Vendor Name

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This field is used to fill any Vendor list in AyaNova associated with that vendor type where you need to select a vendor.

Vendor names should be unique to make them easily selected from within the drop down selection fields.

If you have branches of the same Vendor with the same name to enter, we recommend you append to their name something descriptive so you can tell them apart when selecting.

For example you could append the Vendor name with the street name or city name or country or branch number if the Vendor numbers their branches

Account Number
This field would be for informational purposes.

Web Address
This is useful because you once you enter in the address here, you can just click on the Web Address button which will open up your default web browser and automatically enter in the URL to bring you to the vendor's website.

Vendor Type
Select what type of vendor this is. Identifying this here allows you to easily select the vendor from within other areas of the full AyaNova that display only certain types of vendors. For example, in the Outside Service screen field Shipped Via: only those vendors identified as Shippers would be listed.

Contact
Suggestion is to enter the first and last name of the main contact for this vendor in this field

Email
Enter in the main contacts email address here

Business, Fax, Home, Mobile, Pager
Enter appropriate phone numbers where indicated.

Postal Address and Physical Address
The Postal Address would be the address where they receive mail. The Physical Address would be where they receive deliveries or where they are physically.

You can switch between these two addresses by clicking on the drop down arrow to display, and then clicking on either the Postal Address or Physical Address.

Notes
These are notes about this vendor for viewing when on the vendor record screen only. They are not intended to be used elsewhere in the program.

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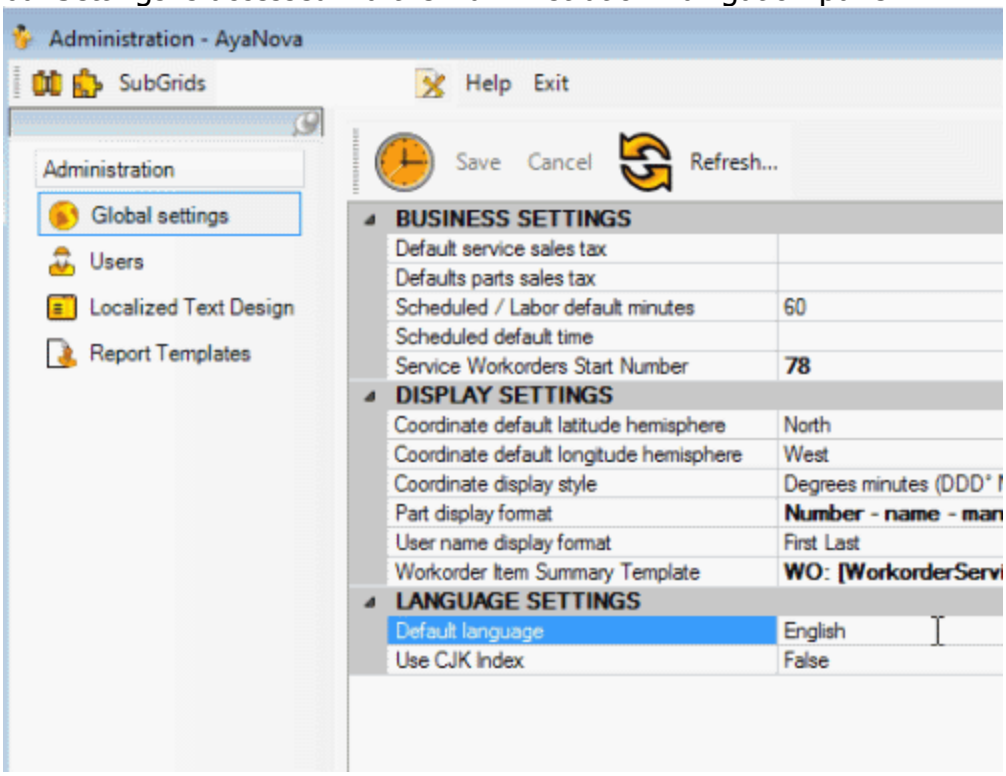
4.8 Global Settings

Global Settings is where you set default and global settings.

Global Settings is accessed via the Administration navigation pane



Edited Global Settings won't be in effect **until after you Save, exit out of AyaNova Lite and run AyaNova Lite again**.

Business Settings
Display Settings
Language Settings

Business Settings

Default service sales tax

Sales tax used by default for services on workorders. Select an existing created Tax Code that you want to default for labor selected in a workorder. Note you can still change in the workorder.

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Default parts sales tax

Sales tax used by default for parts on workorders. Select an existing created Tax Code that you want to default for parts selected in a workorder. Note you can still change in the workorder.

Scheduled / Labor default minutes	90

Scheduled / Labor Default Minutes

Enter in minutes the default time span for a Start and Stop Date/Time for Labor and for Scheduled in a workorder.

For example, if you enter in 90, that means if you enter in a Start Date/Time for Labor of 9:00AM the Stop Date/Time will automatically pre-enter 90 minutes later for you at 10:30AM to save typing time. You can of course still edit the Stop Date/Time.

Scheduled default time	7:00 AM

Scheduled Default Time

Enter the default time you want the Scheduled to default to when created via the service workorder entry screen.
Leave empty if you want it to default to midnight
Do note a Scheduled User record will default to today's time if today's date is selected when creating the Scheduled user record, regardless of what you enter in this business setting.

Service Workorders Start Number	744

Service workorders start number

You can enter whatever number you want here as the Service Workorder starting number. Do note that it must be greater than existing used numbers for Service Workorders. Once you have entered a number and saved, you can not enter a smaller number.

NOTE about starting numbers – when editing starting number for workorders, quotes, purchase orders or inventory adjustments, do be aware that the value displayed in the Global Settings screen is the existing highest existing number for that table.

Even if you edit the Global Settings starting number, until you make a new workorder, po, quote etc, the highest existing number is still the same as it was previously in the record.

So if you edit the starting number – you **need to** make at minimum one new workorder or new quote, etc to actually "set" the new starting number as the highest existing number.

Company Info

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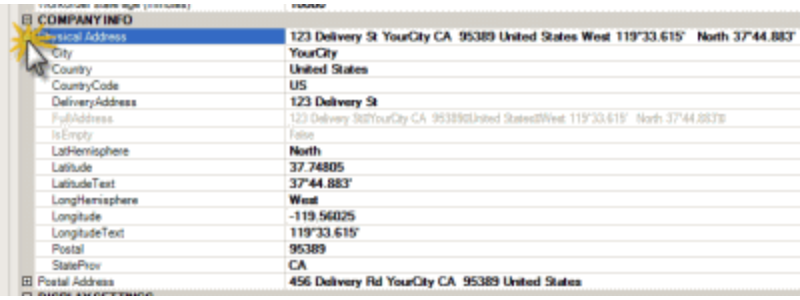
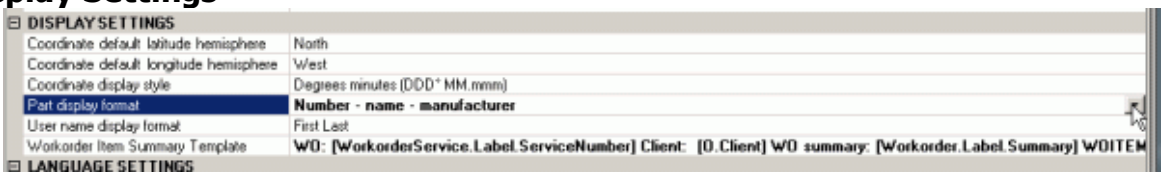


COMPANY INFO	
Physical Address	123 Delivery St YourCity CA 95389 United States West 119°33.615' North 37°44.883'
City	YourCity
Country	United States
CountryCode	US
DeliveryAddress	123 Delivery St
PubAddress	123 Delivery StYourCity CA 95389United StatesWest 119°33.615' North 37°44.883'
IsEmpty	False
LatHemisphere	North
Latitude	37.74805
LatitudeText	37°44.883'
LongHemisphere	West
Longitude	-119.56025
LongitudeText	119°33.615'
Postal	95389
StateProv	CA
Postal Address	456 Delivery Rd YourCity CA 95389 United States

NOTE: These are not tied into any reports or other information

Some properties are further expandable to edit additional aspects of the property, such as Physical Address and Postal Address. Click on the + sign on the left hand side to expand the property so it can be viewed completely as well as edited.

Display Settings



DISPLAY SETTINGS	
Coordinate default latitude hemisphere	North
Coordinate default longitude hemisphere	West
Coordinate display style	Degrees minutes (DDD° MM.mmm)
Part display format	Number - name - manufacturer
User name display format	First Last
Workorder Item Summary Template	WO: [WorkorderService.Label.ServiceNumber] Client: [0.Client] WO summary: [Workorder.Label.Summary] WOITEM
LANGUAGE SETTINGS	

Coordinate default latitude hemisphere

Coordinate default longitude hemisphere

Coordinate display style

Determines how geographic co-ordinates are displayed

Part display format

Sets the format for how parts are displayed for selection. For example the display may be changed from Number – Name – Manufacturer to display instead as Assembly – Number – Name.

User name display format

Determines the format of how your schedulable user displays in screens and on reports.

Workorder Item Summary Template

This determines what information from a service workorder item will display on the Schedule screen.

See also:
Workorder Item Summary Template tags
How do I edit the Workorder Item Summary Template Editor for popup on the Schedule Screen?

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Language Settings

Default language

Language that all localized labels will be set to.
AyaNova includes sample English, Spanish, French and German locales
See also:
Localized Text Designer

Use CJK Index

Only set to TRUE if entry of Chinese, Japanese or Korean characters into fields and labels. TRUE uses intensive indexing features not required by other languages that can affect performance.

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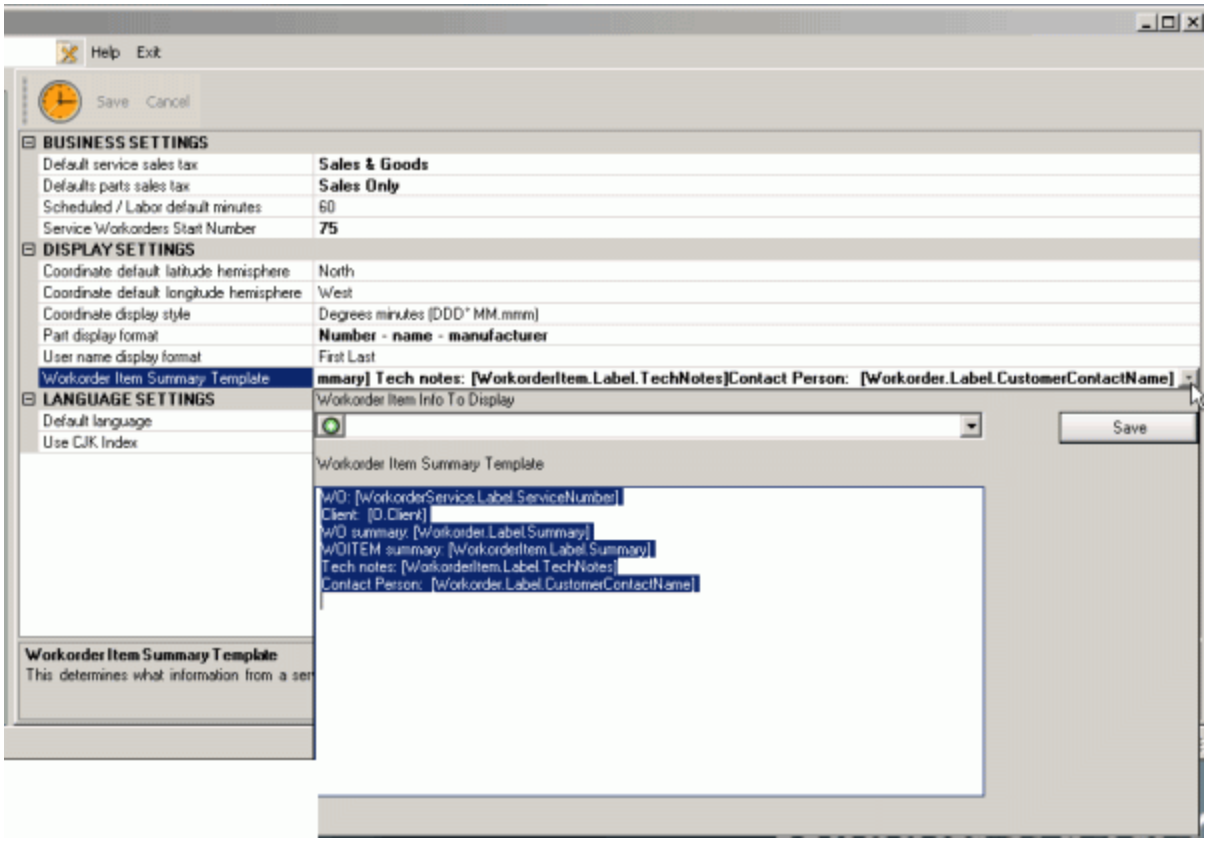
4.9 Global Settings - Workorder Item Summary Template tags



The **Workorder Item Summary Template** field in Global Settings is where you set what information from a service workorder item to display on the Schedule screen when you hover your mouse over a scheduled workorder item.

See also:

[How do I edit the Workorder Item Summary Template Editor for popup on the Schedule Screen?]

Below identifies the tags available for the **Workorder Item Summary Template** field in Global Settings - what each equates to in the workorder item itself.

[O.Client] - the name of the client of the scheduled workorder

[O.WorkorderCategory] - the workorder category selected in this workorder

[O.WorkorderItemScheduledUser] - the scheduled user of this workorder item

[O.WorkorderStatus] - the workorder item status of this workorder item

[Workorder.Label.CustomerContactName] - the Contact text entered in the workorder

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[Workorder.Label.CustomerReferenceNumber] - the Reference # text entered in this workorder

[Workorder.Label.InternalReferenceNumber] - the Internal Reference # text entered in this workorder

[Workorder.Label.Onsite] - displays True if Onsite is checked, or False if Onsite in the workorder is not check-marked

[Workorder.Label.Summary] - the Workorder Summary text entered in this workorder

[WorkorderItem.Label.TechNotes] - the Service Notes text entered for this workorder item

[WorkorderItemScheduledUser.Label.StartDate] - the Start Date/Time for the Scheduled User of this workorder item

[WorkorderItemScheduledUser.Label.StopDate] - the Stop Date/Time for the Scheduled user of this workorder item

[WorkorderService.Label.InvoiceNumber] - the Invoice # text entered in this workorder

[WorkorderService.Label.ServiceNumber] - the service workorder number of this workorder

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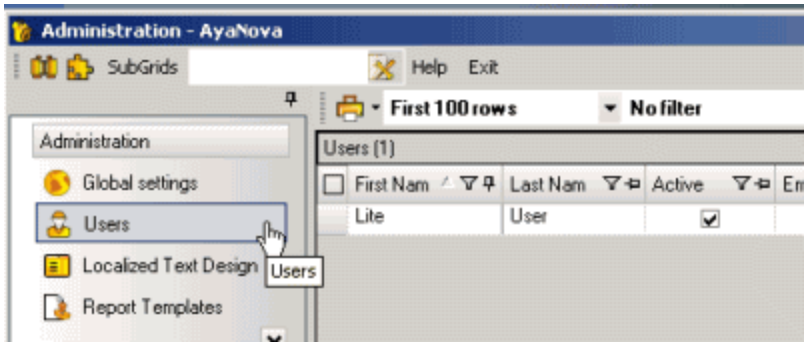
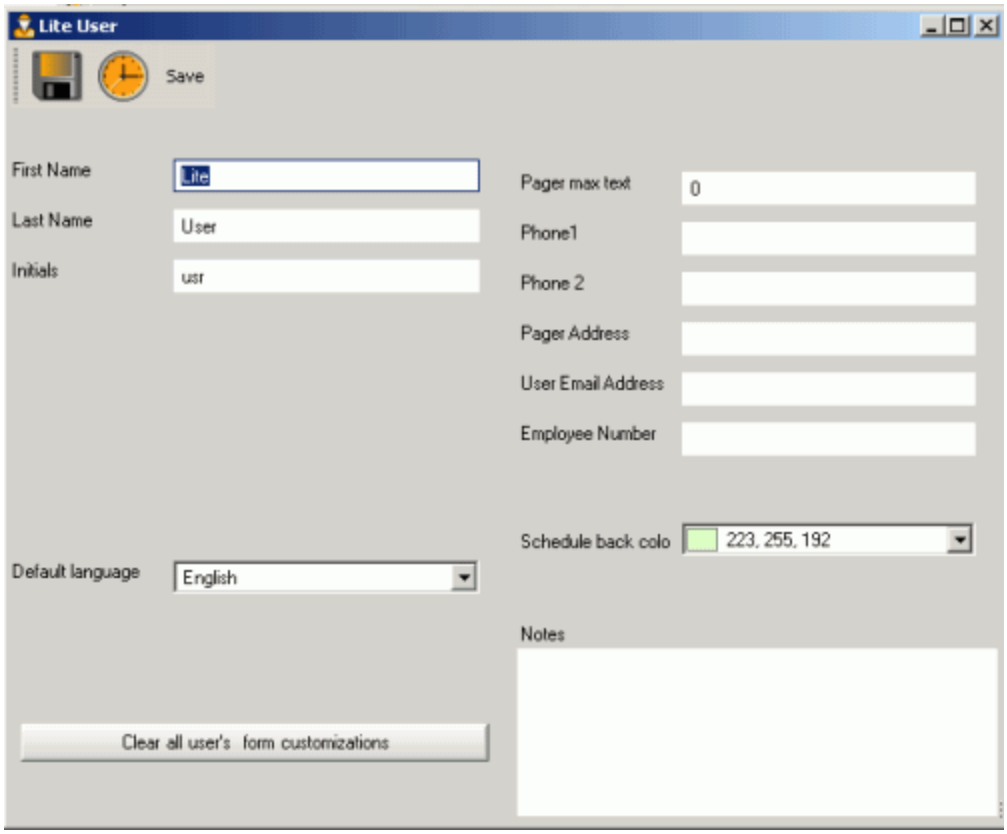
4.10 Users entry screen



NOTE: Additional users can not be created or added to AyaNovaLite, as AyaNovaLite is designed for only one user. If you require additional users, you will want to use the full AyaNova.

In the Users grid in the Administration navigation pane, click on the jump button for either Lite or User to open the Lite User entry screen so that you can edit it.



NOTE: Fields not used in AyaNovaLite compared to the regular full AyaNova have been removed from showing, which is why there appears to be gaps between field placement on the entry screen.

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User entry screen

First Name

This is an identification field used in the global setting on how to display this user in drop down selection lists such as in the Schedule screen, in the Labor grid, etc.

Last Name

This is an identification field used in the global setting on how to display this user in drop down selection lists such as in the Schedule screen, in the Labor grid, etc.

Initials

Initials of the user may be used in various grids and screens.

Default Language

A default language is required. New users default to the default language set in Global Settings.

New installation of AyaNova will also install sample Deutsch (German), Español (Spanish) and Français (French) language locales.

See also:
Localized Text Designer

Pager Max Text

This is for informational purposes only and not tied to Notification Subscriptions

Phone 1

This would be for informational purposes to display for contact.

Phone 2

This would be for informational purposes to display for contact.

Pager Address

This is for informational purposes only and not tied to Notification Subscriptions

User Email Address

This is for informational purposes only and not tied to Notification Subscriptions

Employee Number

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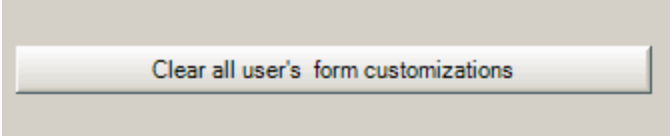
This is an identification field used in the global setting on how to display users in drop down selection lists.

Schedule Back Color

When viewing the Schedule screen, this schedulable user' workorder items will have this back color for easy viewing.

Also see: Schedule screen

Clear all users' form customizations



When selected, this will clear any changes a user has made to grids such as column placement, display or not display columns, and sizing. When the user next logs in, the grid display (position of columns in grids) will have taken the saved grid settings of the AyaNova Administrator.

This is useful if the user has done something funky with their grids or entry screens, and you want to reset them back to that of the AyaNova Administrator to reset it.

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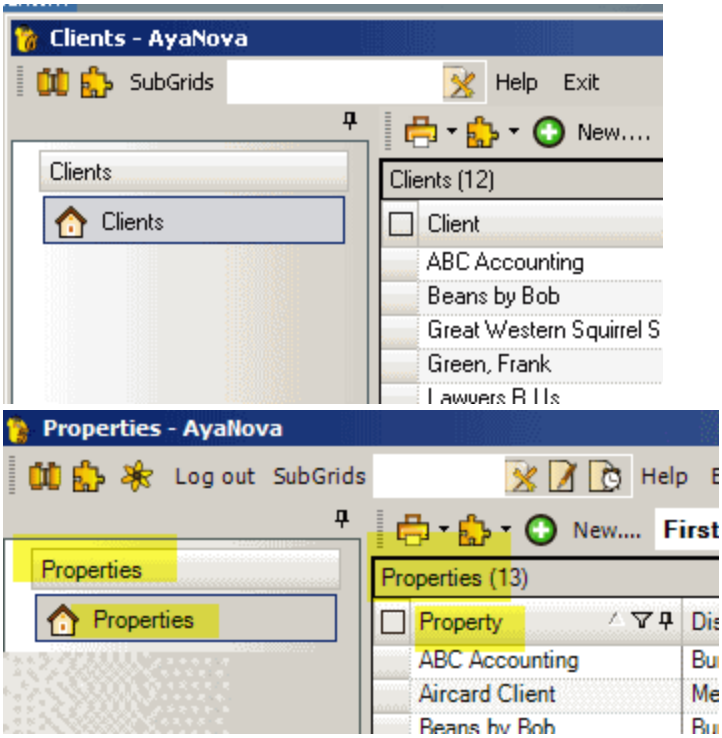
4.11 Localized Text Designer



The Localized Text Designer is where you localize displayed text labels for fields in AyaNovaLite.

Localization can be the process of changing text to display in another language or to change terminology to suit your unique business requirements.

For example, you may localize a text field to change what is presently displayed as "Clients" to display as "Properties" if you provide service for properties rather than clients. Or your may even localize all text fields to a language other than English.

AyaNova includes four sample localizations with English as the default selected in the user entry screen. The sample locales are English, French, German and Spanish.

- The default **English** locale is not directly customizable. You must create a copy of an existing locale, and then edit that custom locale.
- AyaNovaLite includes three additional example language locales - Deutsch, Español and Français

See also:
How do I customize an existing locale?

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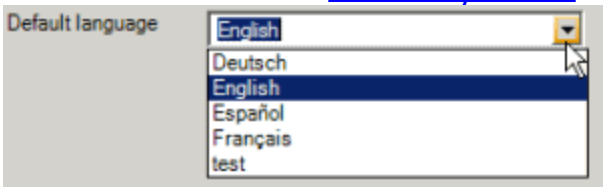
Where selected:

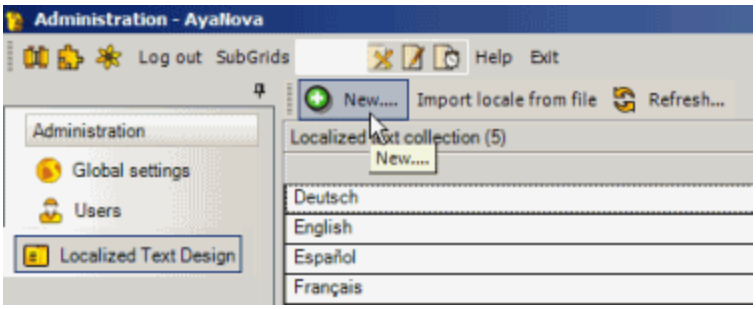
Select the locale in the User entry screen for the field Default Language



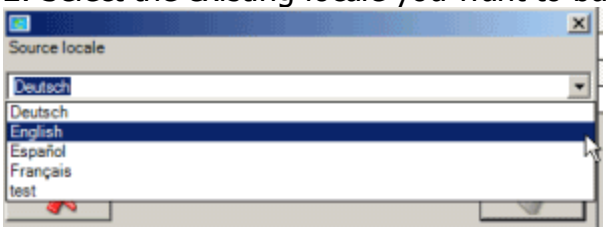
NOTE: A change in locale does not take effect until the user has completely exited and then next logs in. This is because localized text for labels is loaded only when the user newly logs in.

How to create a new locale:

1. In the Localized Text Designer grid, select the menu option New... which will open up the window where you select the Source and enter in the new Locale name



2. Select the existing locale you want to base your new locale on



3. Enter your new locale name, select OK (this can take a couple minutes as it is generated), and then edit the Standard Display Text as you want it to display.

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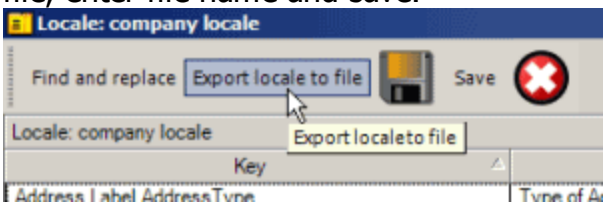
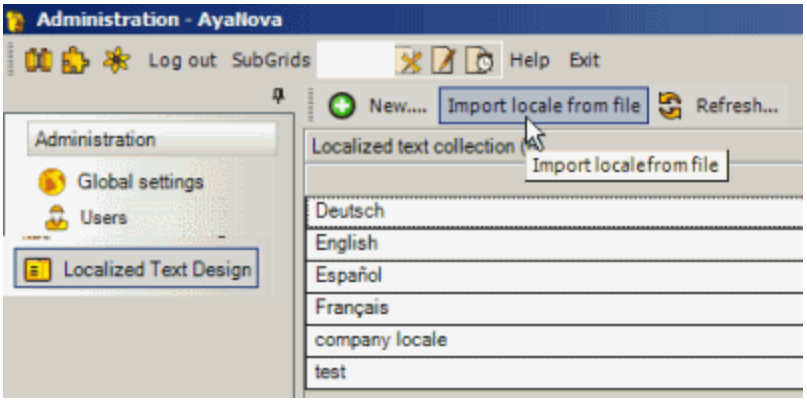
How to export a locale to a file for use by some one else's AyaNova database:

With the custom locale window displayed, select the menu option Export locale to file, enter file name and save.



How to import a locale from a file into your AyaNova database:

In the Localized Text Designer grid, select the menu option Import locale from file



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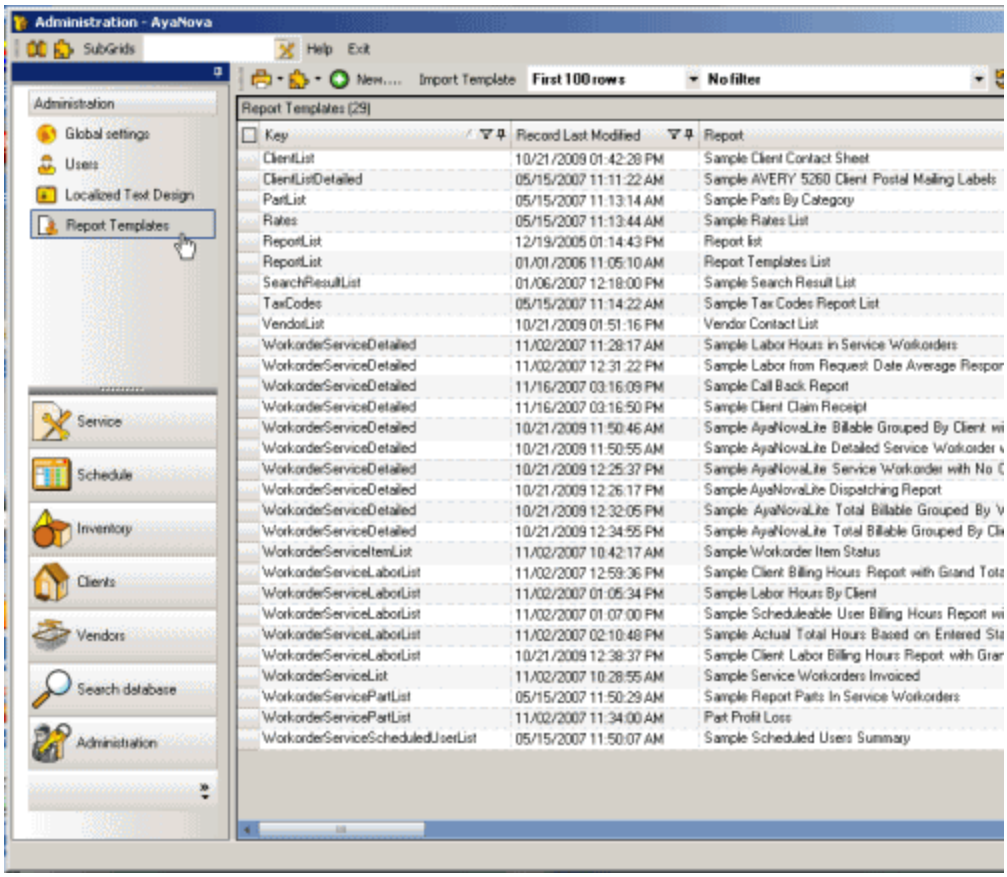
4.12 Report Templates grid

4.12.1 Report Templates grid



The Report Templates grid in the Administration navigation pane displays reports that are presently available within your AyaNovaLite database.

From this grid you can

- Make reports inactive so they do not display for selection
- Change report names as they are displayed for selection
- Identify the size of the report, perhaps determining why a report takes longer to print than another.
- Determine who created the report template and who last modified it and when (only really applicable in the full AyaNova).
- Import report templates obtained from other AyaNova users, consultants, and from the AyaNova website
- Export report templates to provide to other AyaNova users

This Reports grid is **not** where you customize the report template; it is for managing reports as a whole.

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If you need to edit the actual design of a listed report template, you would go to that grid or entry screen from where that report template is selected, and open it via the Design view to edit it.

For example, if you wanted to customize the Client Banked Service Balance report template, you would open the Clients navigation pane, open the Client grid, drop down the Print selection, hold the SHIFT key and select the report template Client Banked Service Balance

Report Template grid columns:

Active	Identifies if this report template is active or not	
Key	Identifies from where this report template is available from	
Record Created	Displays the date this report template was first created	
Record Created By	Displays who first created this report template	
Record Last Modified	Displays the date this report template was last modified	
Record Last Modified By	Displays who last edited this report template	
Region	Displays the Region this report template will display for	
Report	Identifies the name of the report template as it displays in AyaNova	Select to open the Report Template display window
Size	Identifies the size this report template takes up in the database	

4.12.2 Importing a report template

With AyaNova, you can import report templates that others have made. For example, you might want to download and import a sample report template from the AyaNova Support Forum

1. To import a report template, select the menu option **Import Template** from the Report Templates grid in the Administration navigation pane

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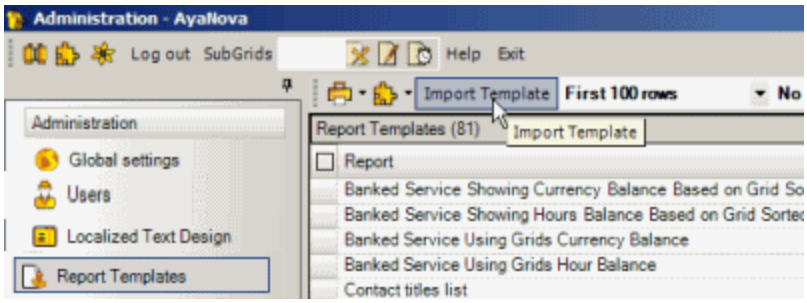
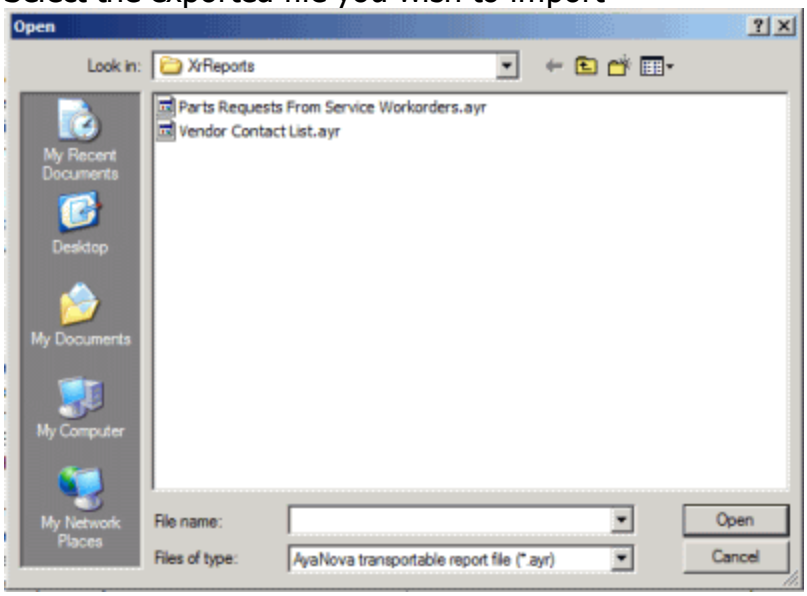


2. Move / browse to the location of the exported file that you wish to import

3. Select the exported file you wish to import



4. Select Open. AyaNova will read the exported report template file and import it into the AyaNova database so that it automatically becomes available in the Print location for its dataset.

5. If you encounter the message "*Select report can not be imported: There is already a report with the same internal ID value in your database* ", this is because as it says, the report template already exists in your database. The report template that is already in your database may or may not have the same name, but it has the same internal ID so AyaNova won't allow you to import and overwrite the existing.

   What you need to do is identify the existing report template and delete it before you can import your report template.

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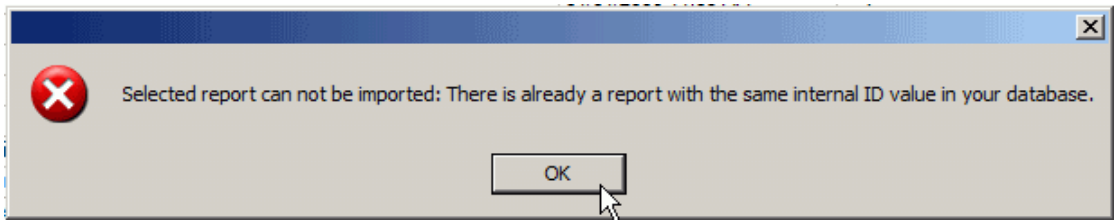
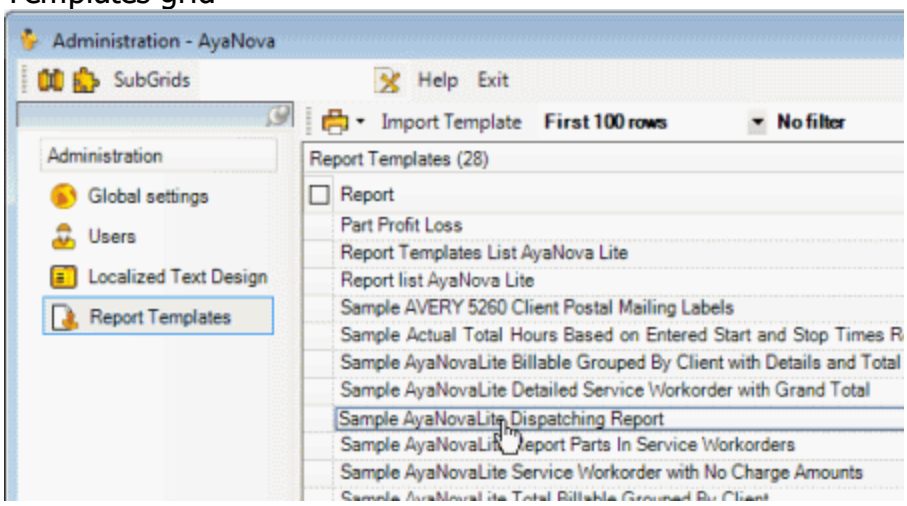


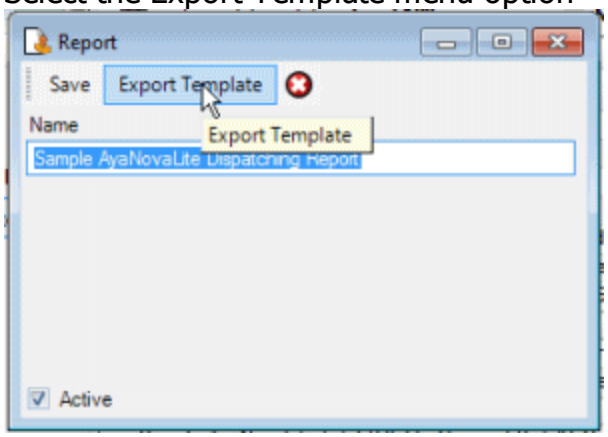
4.12.3 Exporting a report template

With AyaNova you can export report templates to a file so that you can share with other AyaNova users.

1. View the display features of a report template by selecting it from the Report Templates grid



2. Select the Export Template menu option



3. Move to the file system location where you wish to save the report
4. The file name will default to the name of the report and the extension .ayr
5. Select Save to save the report template export file

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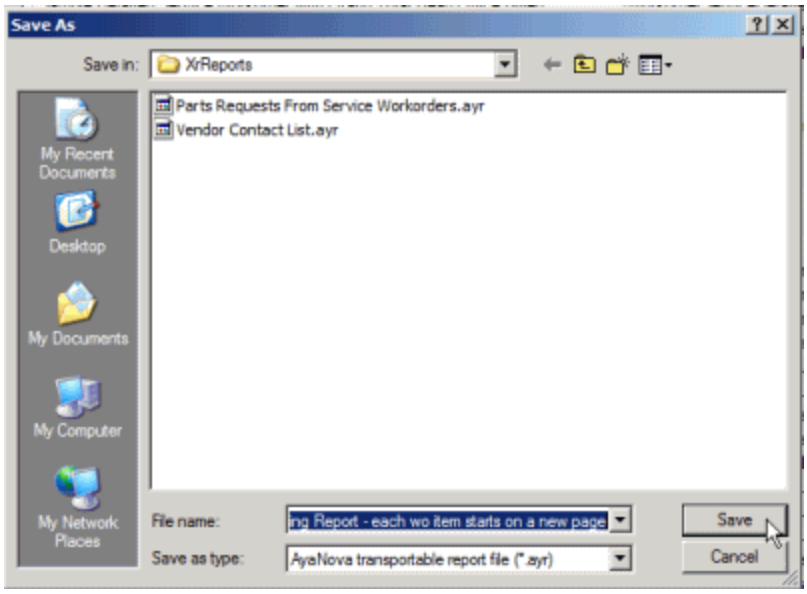
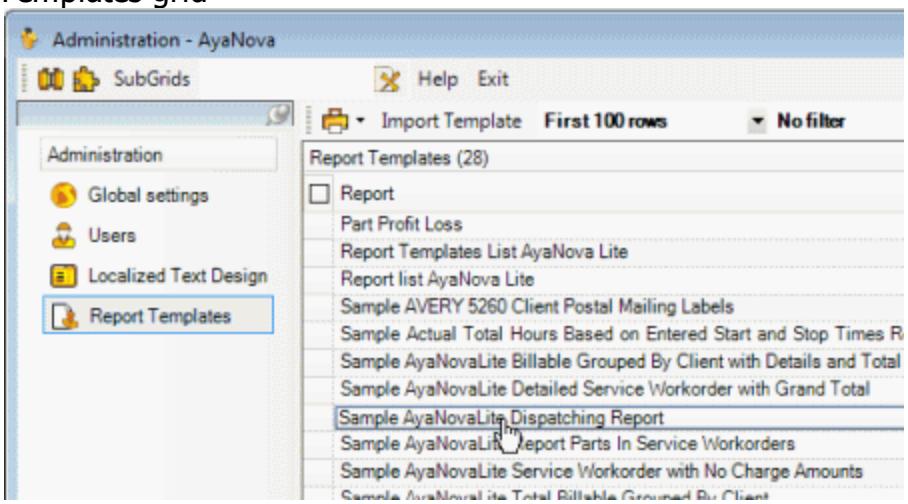


6. You could now provide that report template file to another user who can import it into their database for use.

4.12.4 Rename a report template

An example of why you might rename a report template is to rename an existing sample report template

1. View the display features of a report template by selecting it from the Report Templates grid



2. Edit the name of the report template

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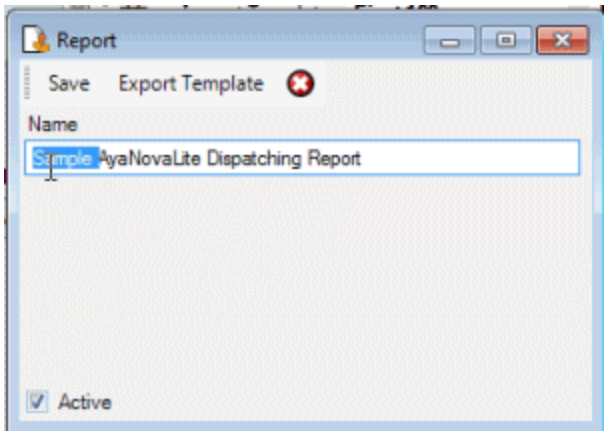
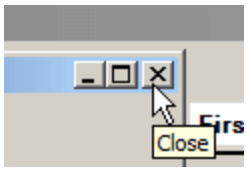


3. Select Save

to save the report template export file and exit out 

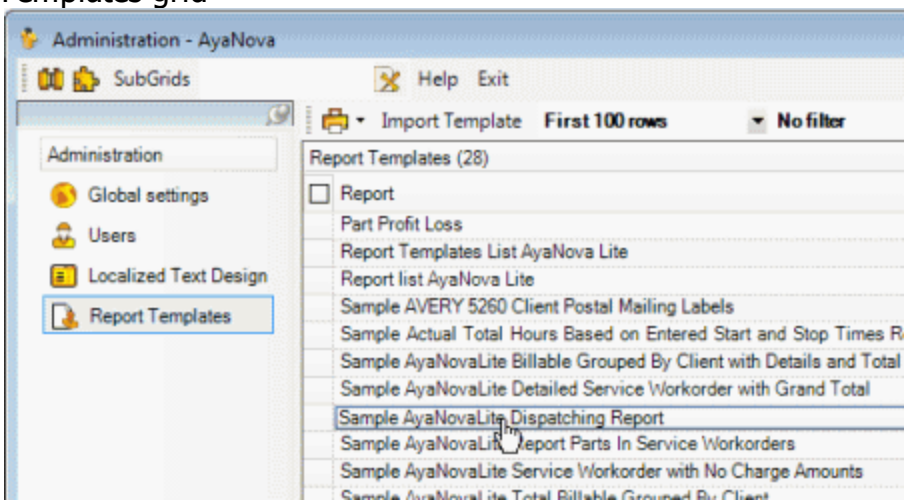
of the display window

4. This report template will now show for selection in its Key area with the new name.

4.12.5 Delete a report template

Do note that if you delete a report template, just like if you delete any record in AyaNova, that completely removes it from the database - it is not recoverable, there is no Undo button.

1. View the display features of a report template by selecting it from the Report Templates grid



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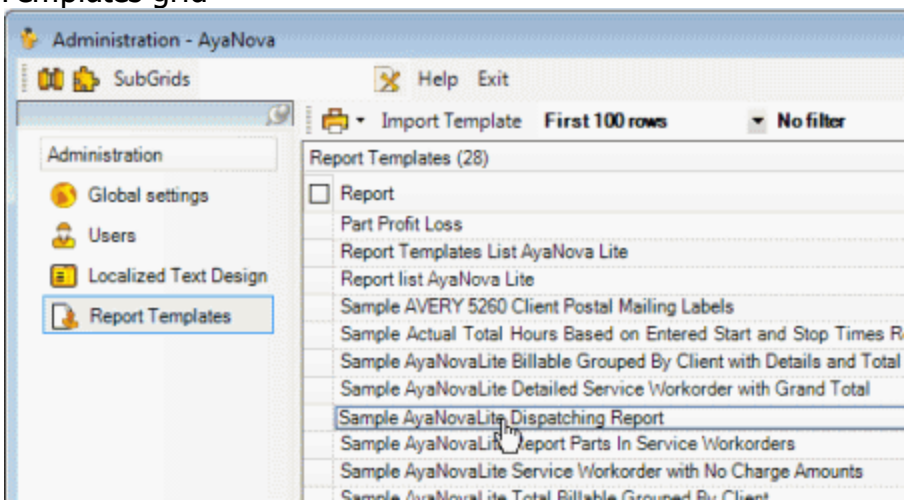
2. Select the Delete menu option

3. AyaNova will ask you to confirm. Once you do, the report template is deleted and is not recoverable.

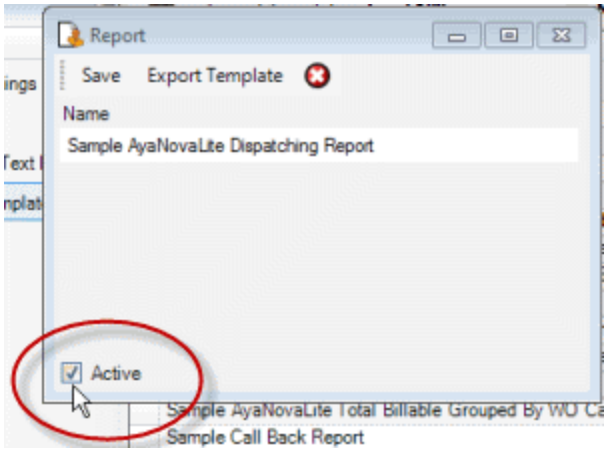
4.12.6 Set a report template to inactive

An example where you may want to set a report template to "inactive" is a report template is presently showing for selection in a grid, but you do not want to delete it, just not have it show right now.

1. View the display features of a report template by selecting it from the Report Templates grid



2. Uncheck the Active field



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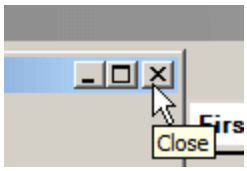
3. Select Save

to save the report template export file and exit out 

of the display window

4. This report template will now no longer show for selection in that grid

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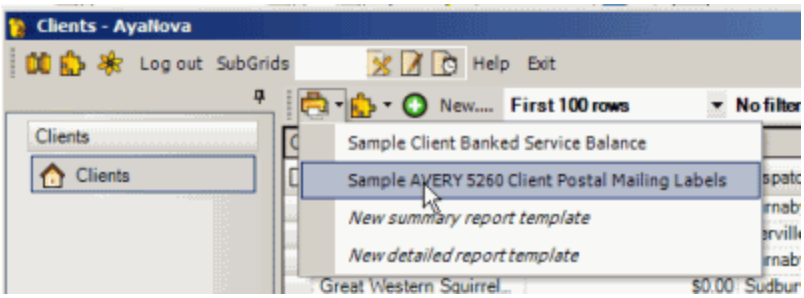
4.13 Report Template Designer

4.13.1 What do I use Report Templates for?



Report templates define the content, layout and presentation of data either from the records you have displaying in a grid, or from the entry screen you are viewing.

When you select Print menu option from any grid or entry screen, a list of existing report templates are displayed for selection.

When AyaNova is installed, it contains many sample report templates. You can customize any of these existing sample report templates as well as create your own report templates. You can also export report templates to a file for others to import into their AyaNova database and vice versa. And you can also download and import additional sample report templates from the AyaNova Support Forum

NOTE: A report template can only display data based on the datafields available for selection in its dataset. Not all fields from other objects are available for all reports.

4.13.2 Creating a new report template

1. Select the menu option Print from the location where you would like the new report template to be accessed from
2. Select either *New summary report template* **or** *New detailed report template* to open the report designer with that grids dataset.

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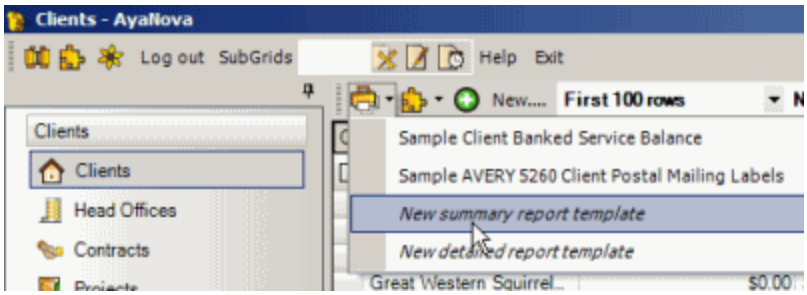
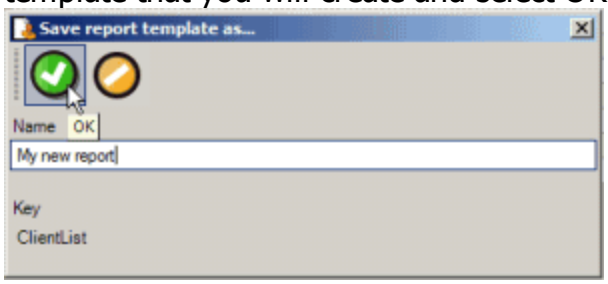


3. The name defaults to Report - enter in a descriptive name for this report template that you will create and select OK



4. The internal report designer screen appears

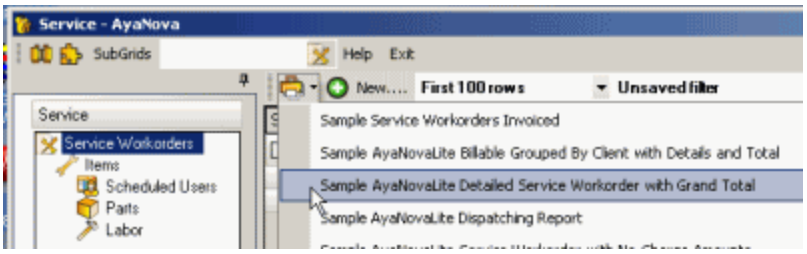
5. Continue with your report template design

For summary report templates see also:
How do I create a report template using the Wizard?
How do I create a label report template using the Wizard?

4.13.3 Customizing an existing report template

1. Drop down the Print menu option button whether in a grid or within an entry screen

2. Hold down the SHIFT key on your keyboard and at the same time select the report template you want to edit.



3. The report template will open in the internal report designer so that you can now edit it as needed.

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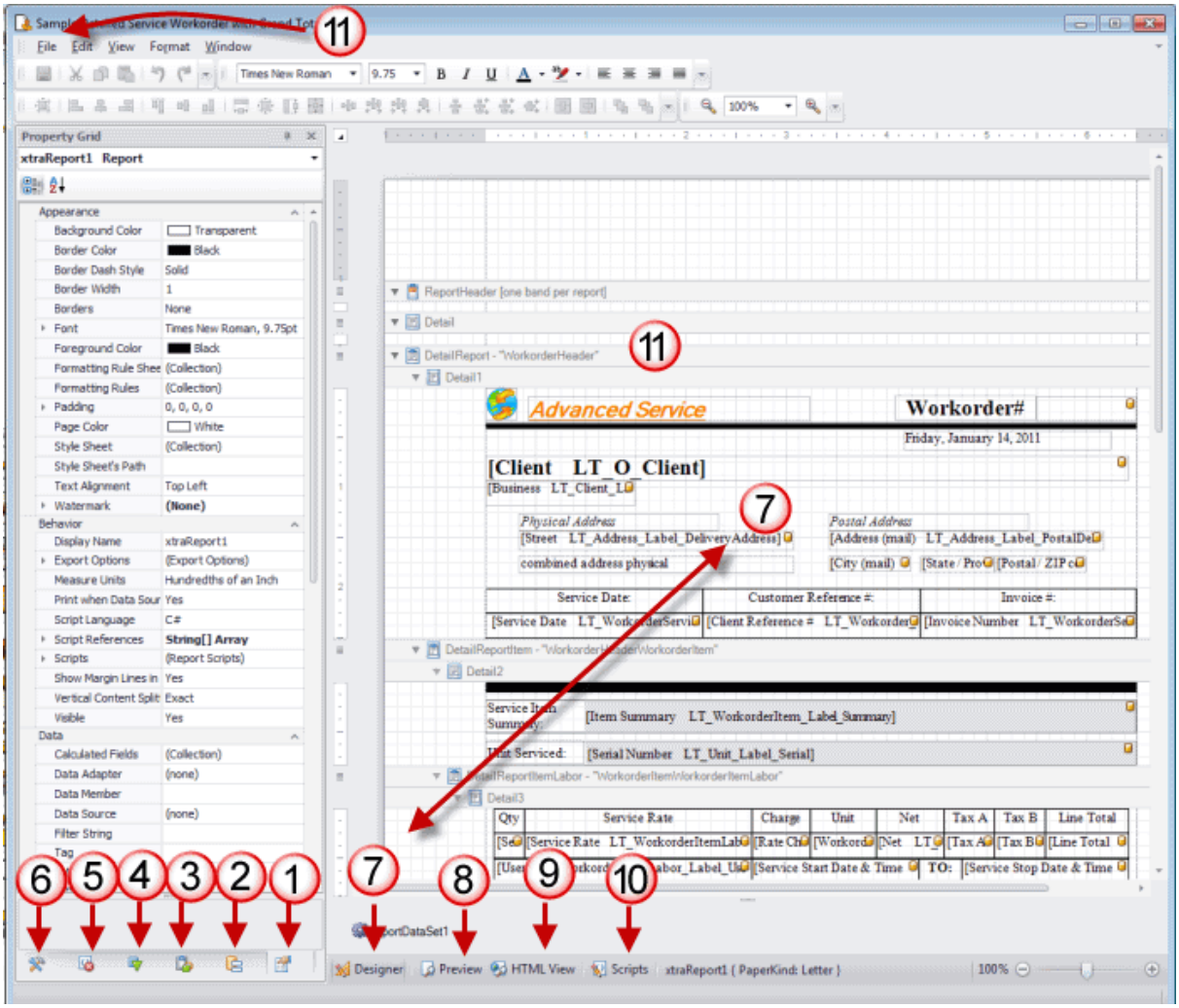
See also:
How do I put my company logo on a report template?
How do I add additional datafields to a report template?

4.13.4 The Report Designer



The Report Designer is where you design and edit a report template

The Report Designer is shown when you have created a new report template

The Report Designer is shown when you are customizing an existing report template

The Report Designer consists of the following layout elements:

1. **Properties** panel - (shown clicked on in the screenshot above). This panel is used to change properties of the report elements (entire report, or individual

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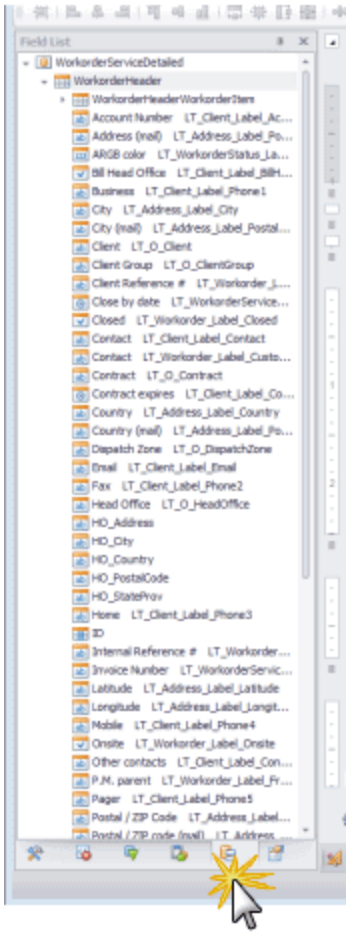
bands, controls and/or datafields) including font, border, scripts, what datafield bound to and more

2. **Field List** panel - Shows the structure of a report's data source, and is used to bind report controls to data. . You can drag datafields directly onto the design area from here too!



3. **Report Explorer** Represents the Report Explorer tree in the report designer. It shows a report's structure in a tree form and provides easy navigation through the report.

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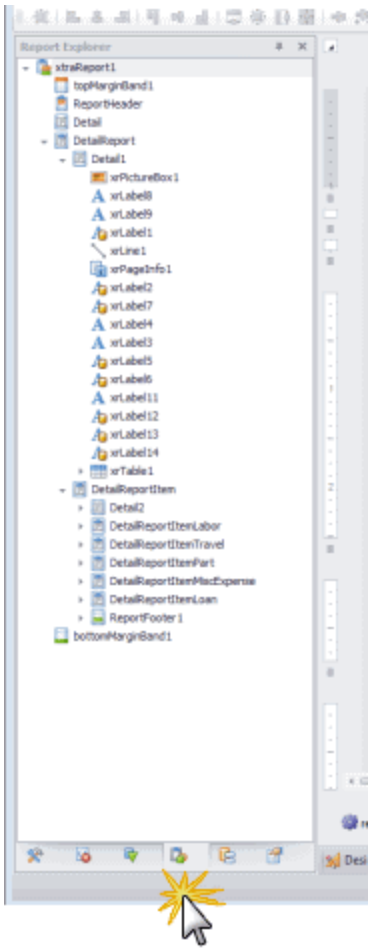

4. Group and Sort Allows you to quickly perform grouping and sorting operations throughout a report, and visually represents the report's grouping structure.

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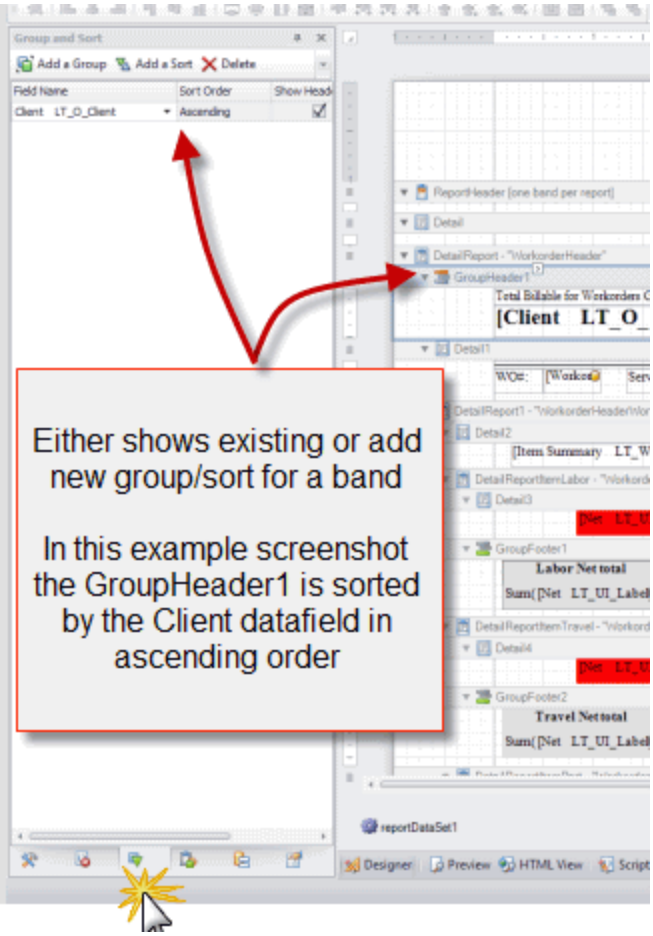

5. Scripts Errors panel **-** When errors are found in a report's scripts (after clicking Validate in the Scripts tab), lists these errors. Clicking an error opens the corresponding script section in the Scripts tab.

See also using scripts in report templates

6. ToolBox panel - This toolbox contains all the report controls and is used to drag and drop new controls onto the report's area.

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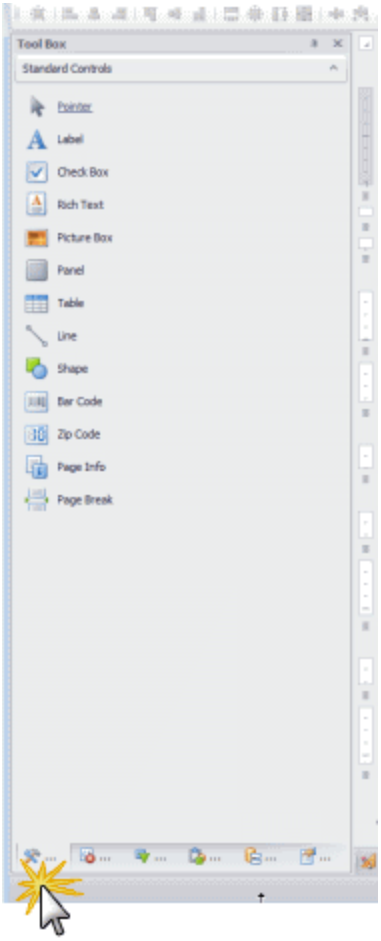

7. Design Panel The main element in the End-User Designer which allows a report's layout to be edited. It contains rulers, design and preview tabs, a status panel and the current report's surface, including its bands and controls.

8. Preview To view results of what you have presently designed. Very useful as you do not have to close the report template while it is in design mode to test it out

9. HTML View To view results of what you have presently designed if was viewing via a web browser.

10. Scripts To view all existing scripts for this report template. Can also edit the scripts via this. See also using scripts in a report template

11. Menu Represents the main menu where you save any customizations, or delete the report template.

Includes also the toolbars where you can format text and design.

File menu option is where you would Save As or delete the report template.

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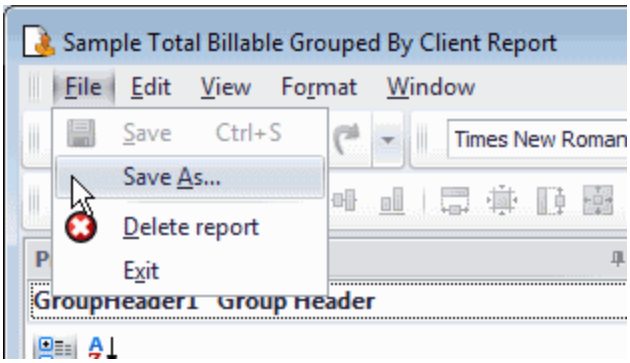

When discussing aspects of customizing report templates, we encourage you use this terminology so everyone is in the same loop.

4.13.5 Difference between Summary and Detailed report template

When creating a new report template, some grids/entry screens will have **both** New summary report template and New detailed report template for selection, whereas others have **only** New summary report template.

Summary reports refer to reports that work with simple "flat" data sources where there is a table of data with single rows. A detailed report refers to a report that reports off a more complex data source where each row has one or more child rows. The majority of the reports in AyaNova are summary reports with detailed reports generally required for more complex inventory and work order reporting.

example from the Service Workorders grid - note has both the New summary report template option as well as the New detailed report template option

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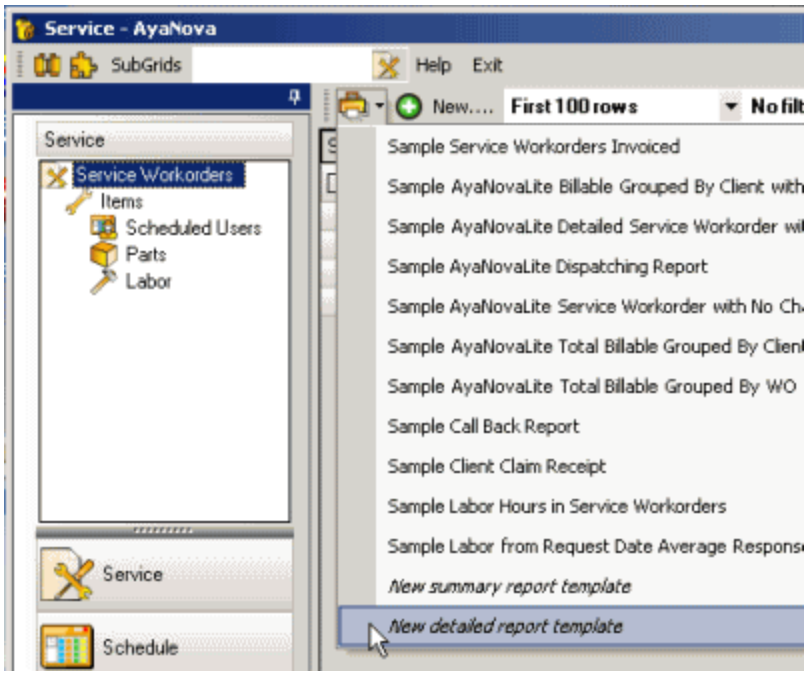
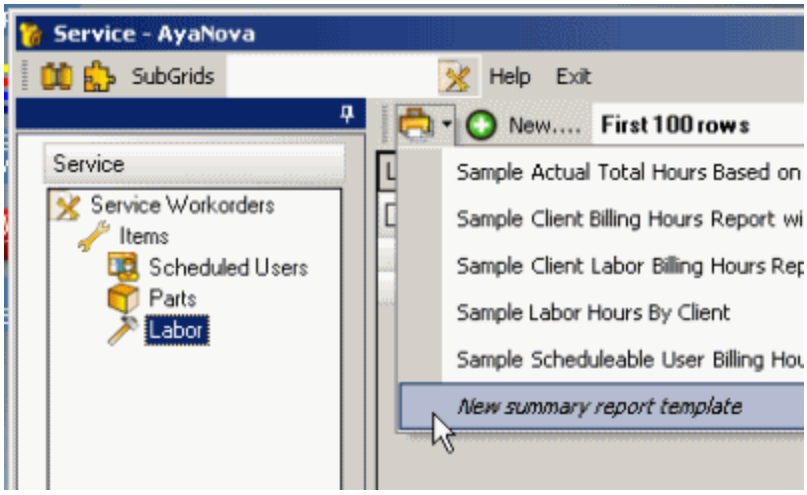


example from the Labor grid - note has only the New summary report template option



A summary report template is different from a detailed report template

Summary report template in the report designer:

- Able to create a new summary report using the Report Wizard from the Properties tab

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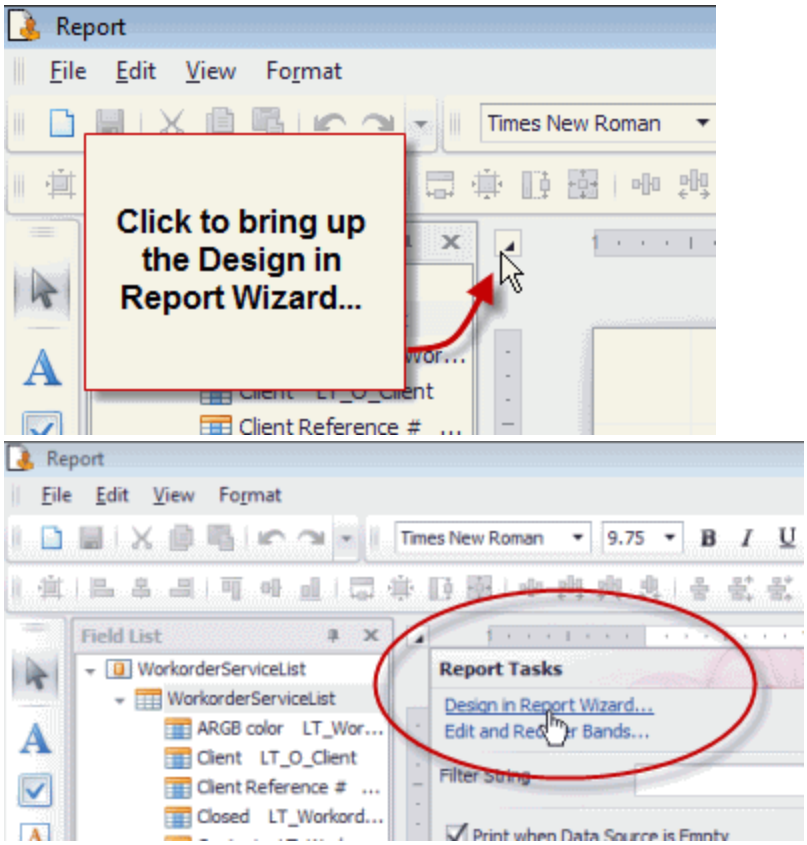
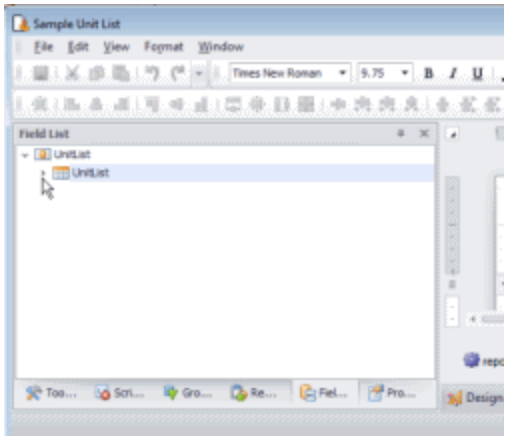
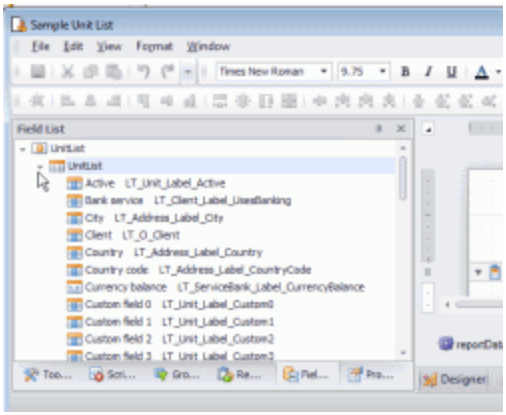


- Only one dataset displays in the Fields tab that when expanded shows the exact same fields as the columns that show for that grid





Detailed report template in the report designer:

- In the Fields tab, when you expand the dataset WorkorderHeader, you will see that there are sub-datasets WorkorderHeaderWorkorderItem, and under

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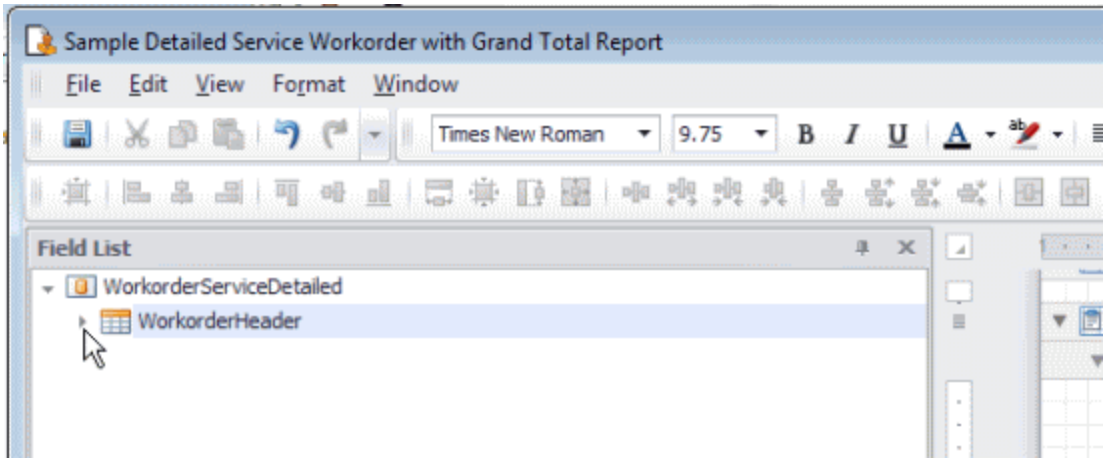
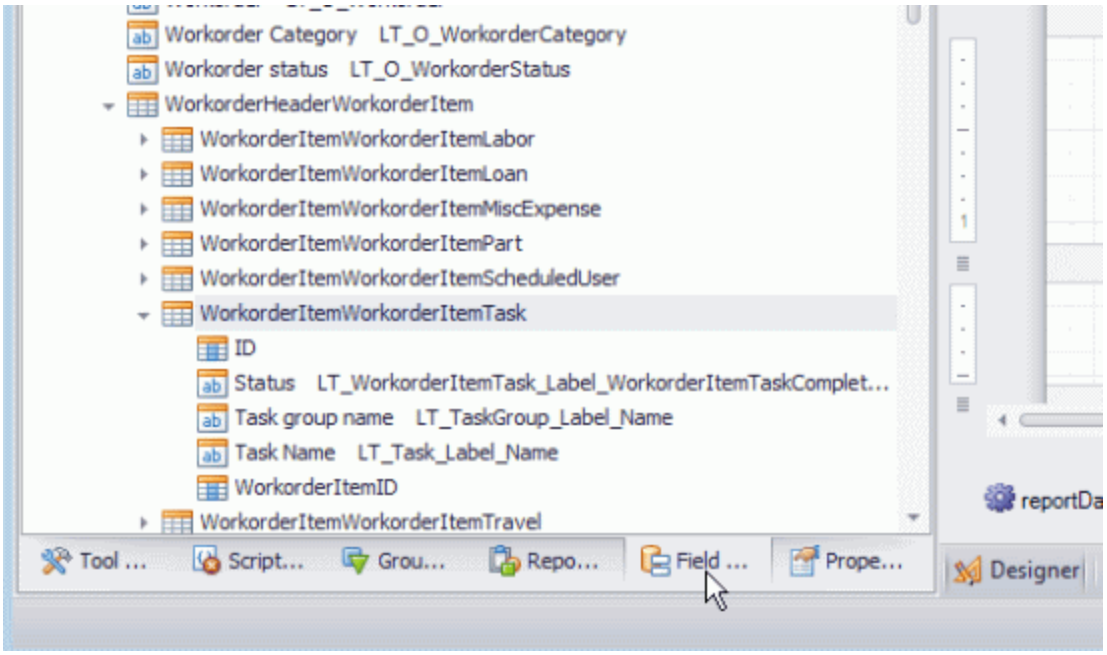
that WorkorderItemWorkorderItemLabor, WorkorderItemWorkorderItemPart and WorkorderItemWorkorderItemScheduledUser





4.13.6 Using scripts in a report template

Scripts in a report template can be used to:

- obtain a grand total of amounts
- manipulate amounts
- display custom fields in a certain way
- set format
- provide custom summaries
- prevent bands from displaying if no data
- merge multiple datafields to display in the same field

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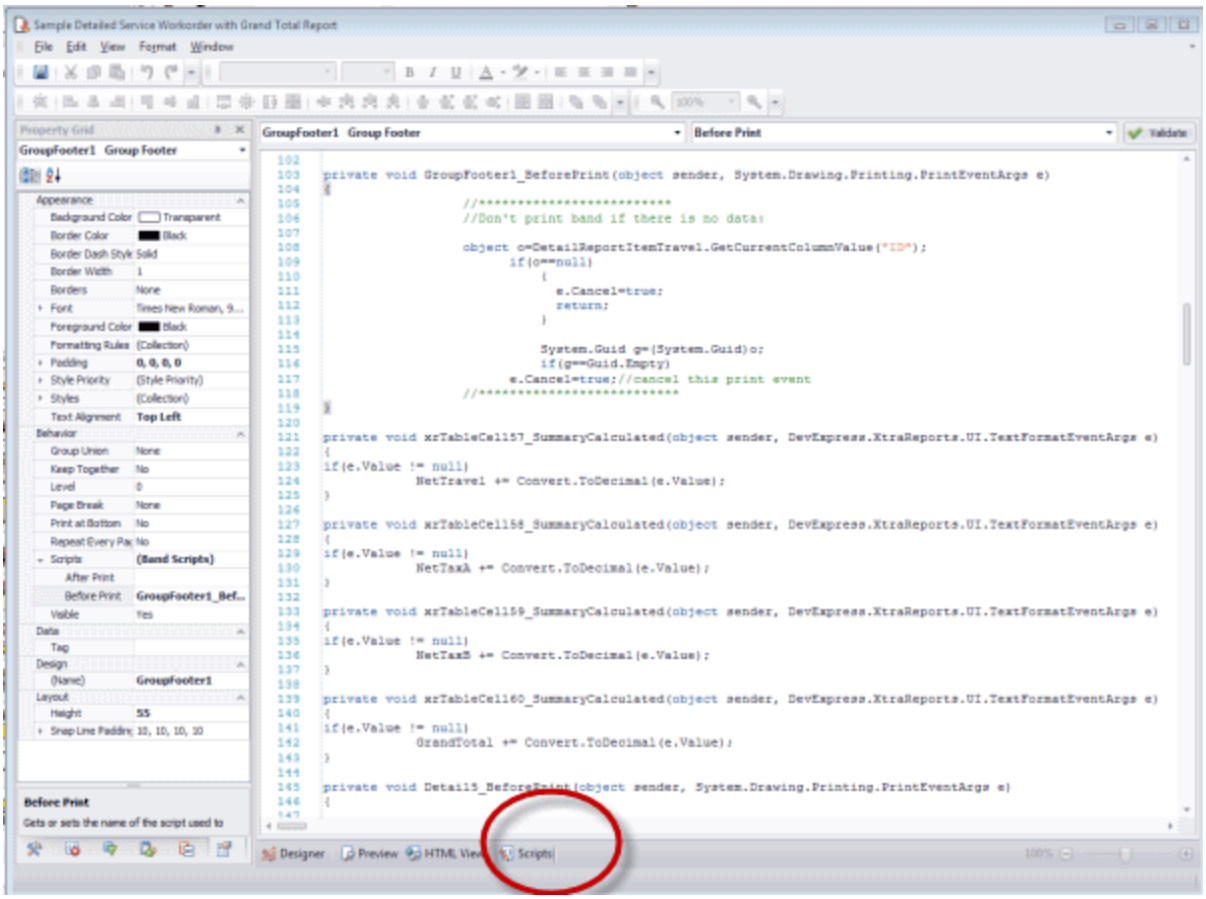
- display checkbox instead of text True or False
- have custom field display as currency
- etc



1. View existing scripts
2. Validate existing scripts
3. To see Scripts Errors after validation
4. To jump to a specific existing script
5. To create new script for a specific band or label
6. Providing script support

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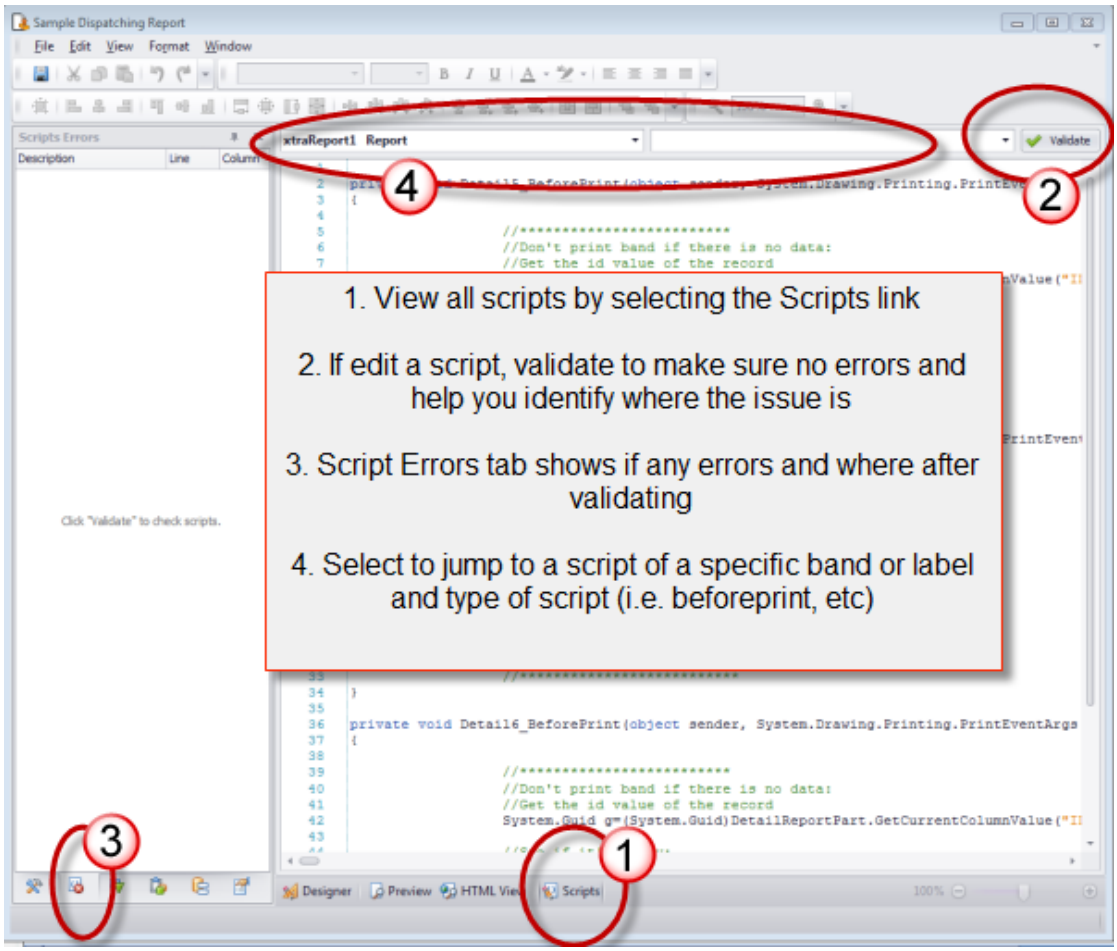
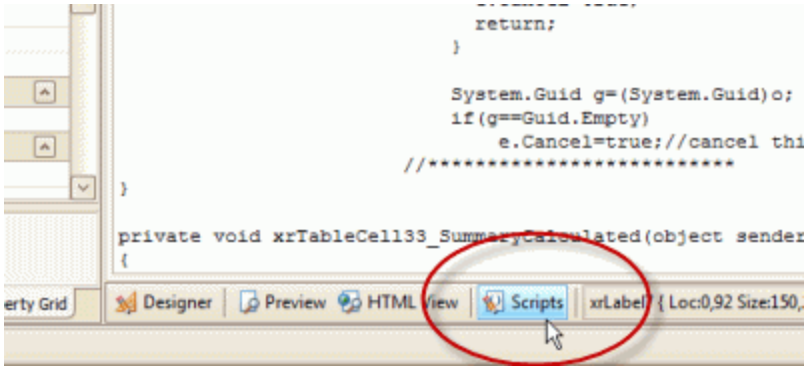


1. To see existing scripts in a report template, click on the Scripts panel selection



2. If you make any edits to any scripts, use the Validate to make sure no errors. It will not fix the errors, but it will let you know if there are errors.

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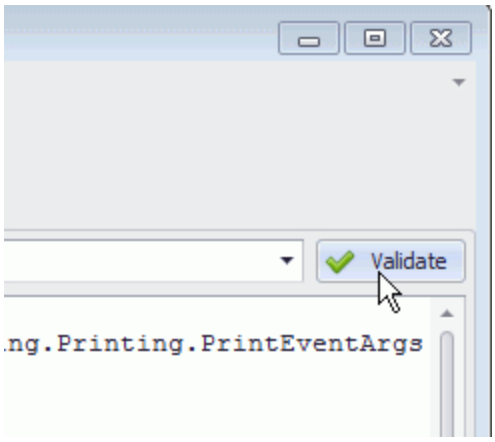
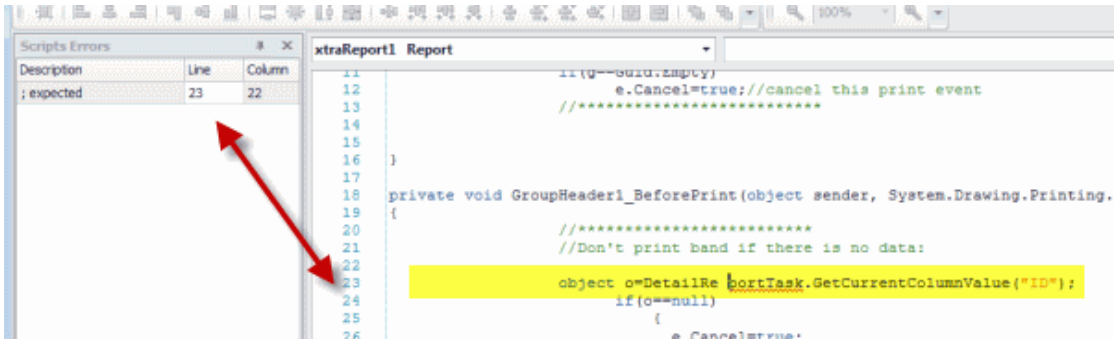


3. Errors will display in the Scripts Errors tab so you can see what line and column has an issue, and resolve it. Of course, the error description because of the way scripts are, may not be specific to resolve the issue - as in that in the screenshot below, the issue is actually because the DetailReportTask has a space in it.



4. If you want to edit a specific script for a specific field or band without scrolling through them all, just drop down and select the band or field the script is for <u>and</u> what type of script it is

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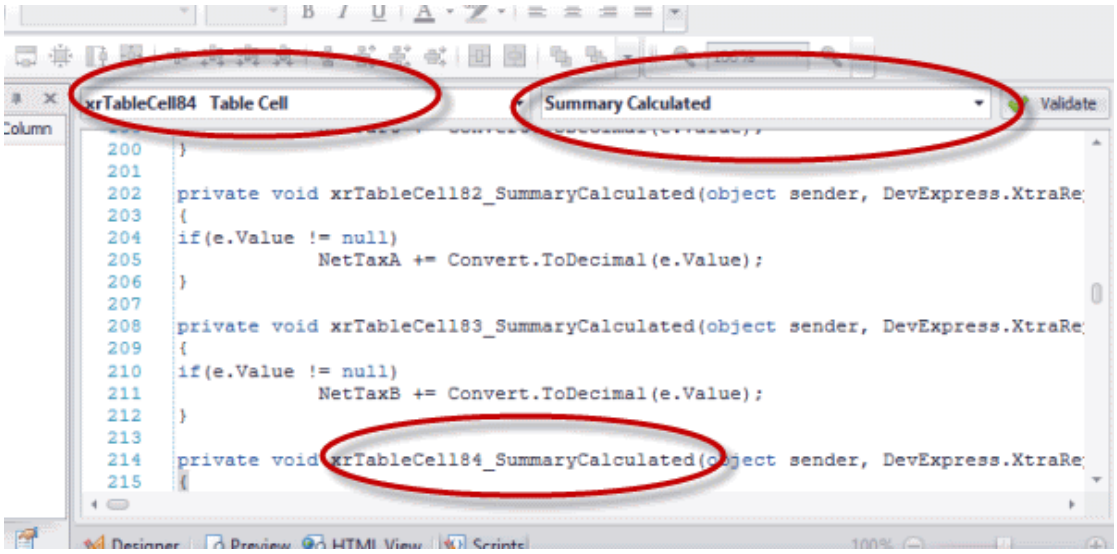
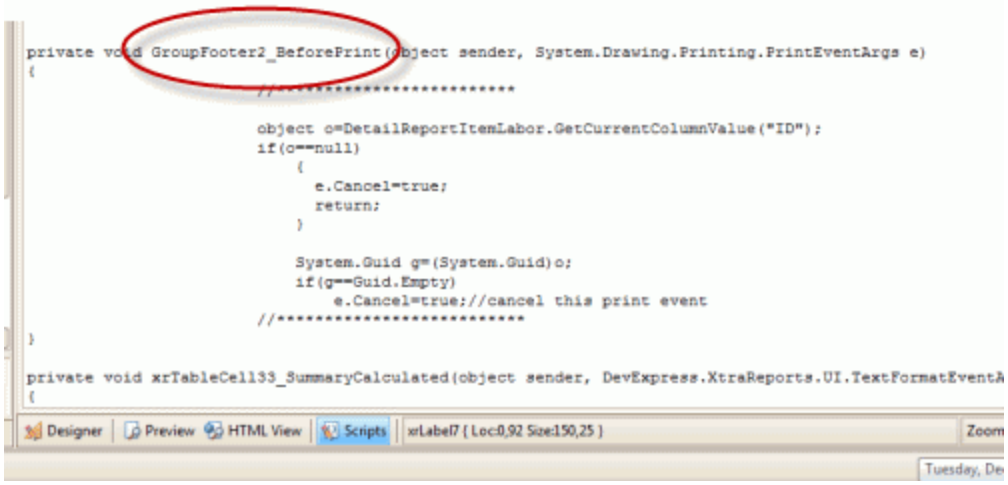


- Note of course, that if you select a band or script, and a script type that does not presently have a script, the report designer will input for you at the bottom of the list of existing scripts as assuming you meant to create a new script

- You can identify which script is for which band or label etc as each is identified in its code. For example, the screenshot below, we know this is the Before_Print script for the GroupFooter2 band.



5. Create a new script for a specific band or label either from the Properties for the band/label, or selecting within the Scripts panel:

a. Create new script from the Properties for the band/label:

i. click on the band or label you want to create the script specifically for

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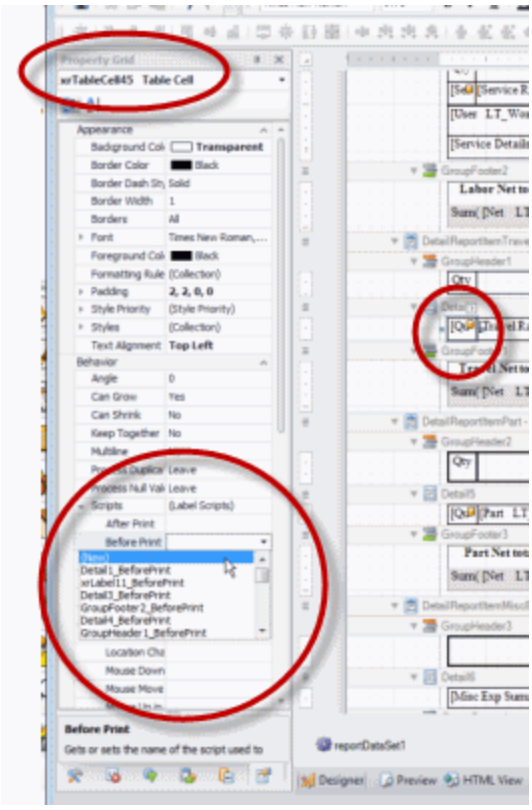
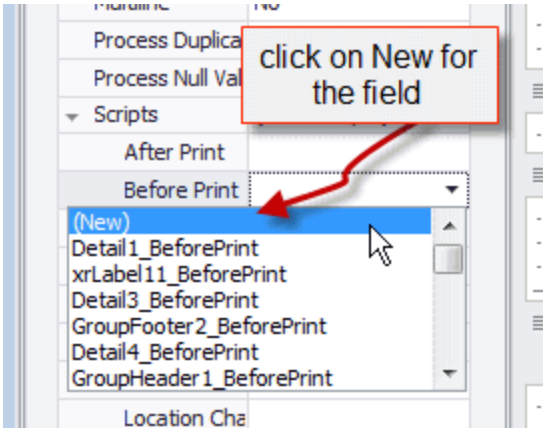
ii. view the Properties tab
iii. expand the Scripts property, and select **New** for the script type you want
iv. the script command structure will be added into the Scripts for you to now edit as needed





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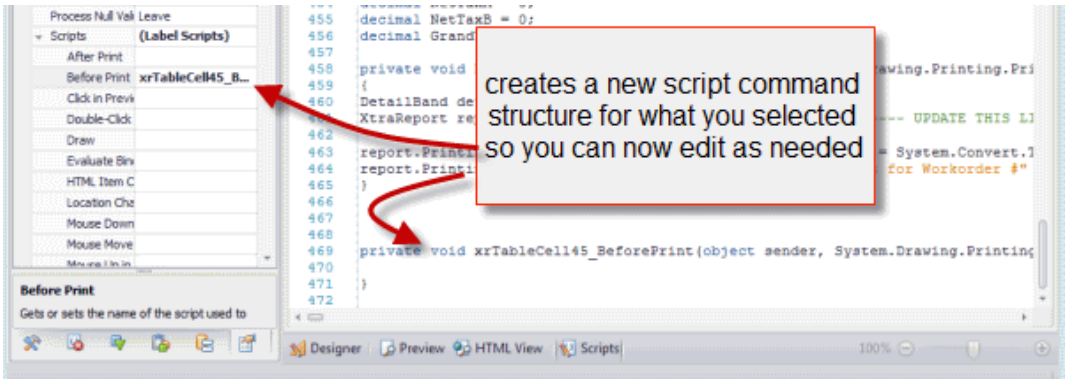
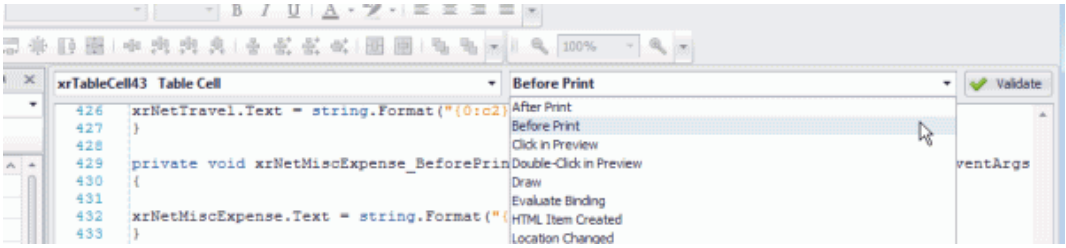


b. Create new script from within Scripts panel:

i. instead of via the Properties tab, just select the band/label from the selection at the top of the Scripts panel
ii. than select the type of script (i.e. Before Print, etc)
iii. the script command structure will be added into the Scripts for you to now edit as needed



6. Providing script support is outside of the realm of AyaNova's free support.

If you are interested in having a custom report template created for you, provide the following information sent directly to *support@ayanova.com*

- a mockup of the report you would like (in Word, Excel, PDF) or existing report template exported to file from AyaNova that you want further customized.
- identify from what AyaNova entry screen or grid this report is for (from Service Workorder entry screen, from Client entry screen, from Labor grid in Service navigation pane, etc)
- identify in red font in the mockup the datafields that correspond with fields of that AyaNova entry screen
- if report will use logos or images, be sure to provide also attached to your email
- any additional information you believe may be relevant that will help me understand how the report will look and act with actual data and how it will react based on the data.

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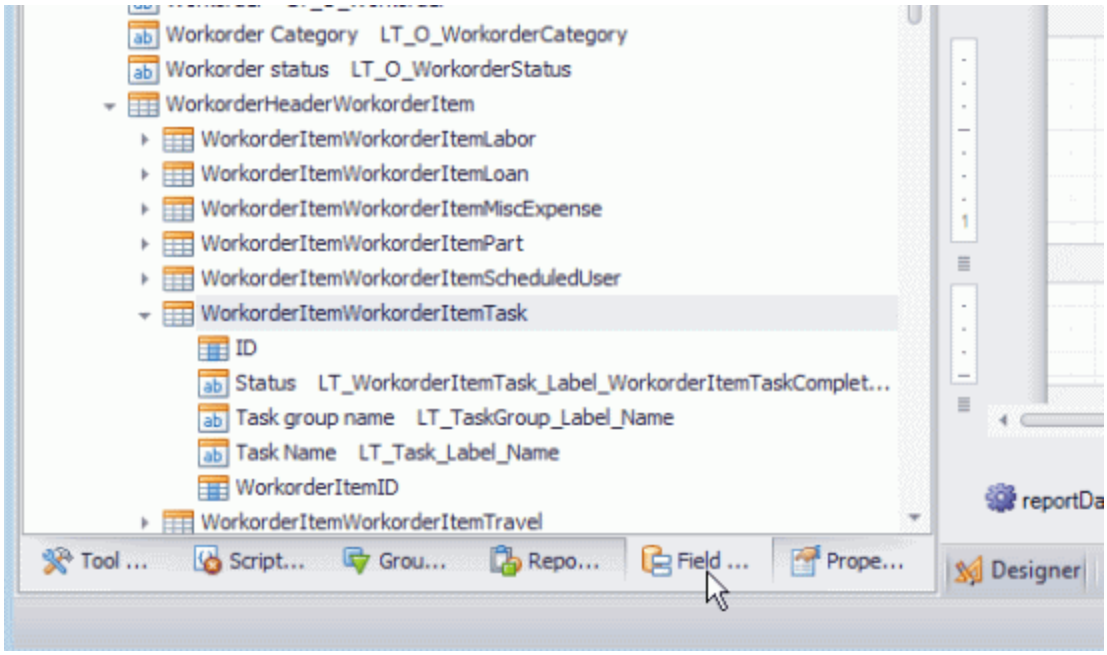
4.13.7 Accessing additional data fields not available in Field List

Please note that the following information is meant for experienced developers only. Additional support is considered outside of our no charge support and a fee to provide may be incurred. We are happy to provide you with custom scripts as needed for a fee - send us detailed information on what you would like and we would be happy to provide a quote.

AyaNova 6.4 and higher provides the ability to include user chosen ad-hoc information in the report templates via scripts using the AyaNova API methods from the code behind reports in the report editor.

For example, you may want what is in the Unit entry screen's Custom fields to show on your detailed type service workorder report template.

Normally what datafields are available for dragging and dropping onto the design panel in the report designer are hard coded in and based on those directly available from that grid/entry screen where you are creating the report template from.



For example, in the screenshot below this report template made from the Service Workorders grid will have the WorkorderItem Request Date and WorkorderItem Summary, but does not list for dragging and dropping the unit's Custom datafields.

Whereas if use scripting and the AyaNova API methods, you can "call" the data from the business objects in AyaNova.

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The AyaNova Support Forum Development/SDK/API section http://forum.ayanova.com/c/ayanova-reporting/development-sdk-api provides a few examples using the API to "call" and display data.

Also refer to the https://api.ayanova.com for available Members. For example:

- in https://api.ayanova.com click to expand the GTZW.AyaNova.BLL namespace
- scroll down and view the Client Class
- under Member is listed that you might use when scripting

Additional support on report template design including use of accessing additional data fields for your reports is considered outside of our no charge support and a fee to provide may be incurred. We are happy to provide you with custom scripts as needed for a fee - send us detailed information on what you would like and we would be happy to provide a quote.

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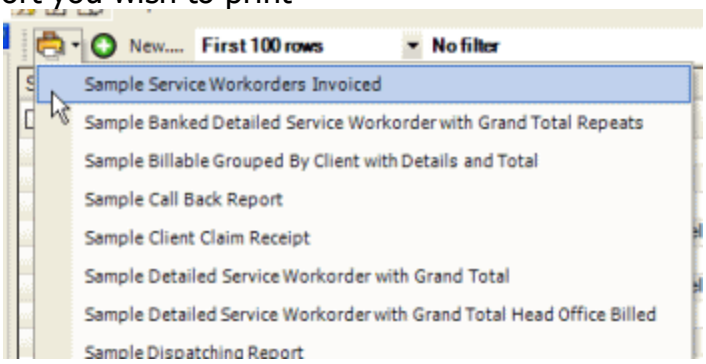
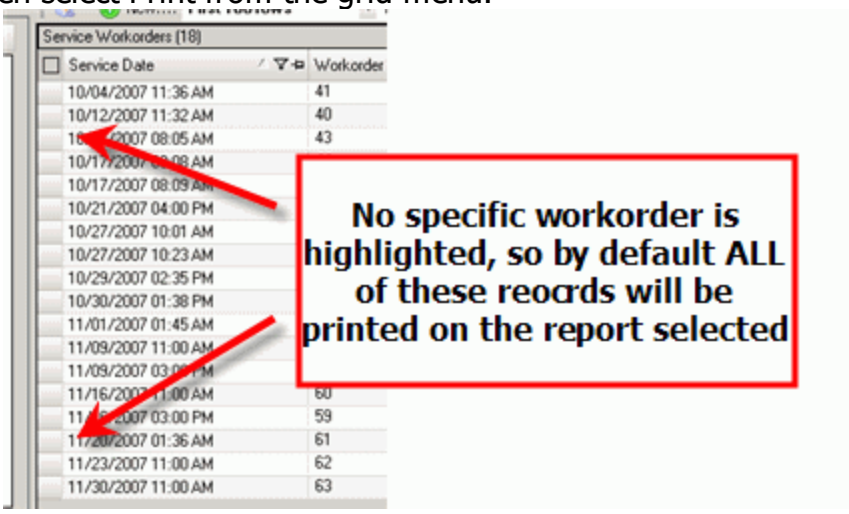
4.14 Printing

4.14.1 Printing from a grid

To print from a grid, select that grid's Print menu option, and select the appropriate report you wish to print



If records are not specifically selected, by default all record's data will be printed when select Print from the grid menu.



Or checkmark the upper left hand corner box (Select All Checkbox) which will automatically select all records, and all record's data will be printed when select Print from the grid menu.

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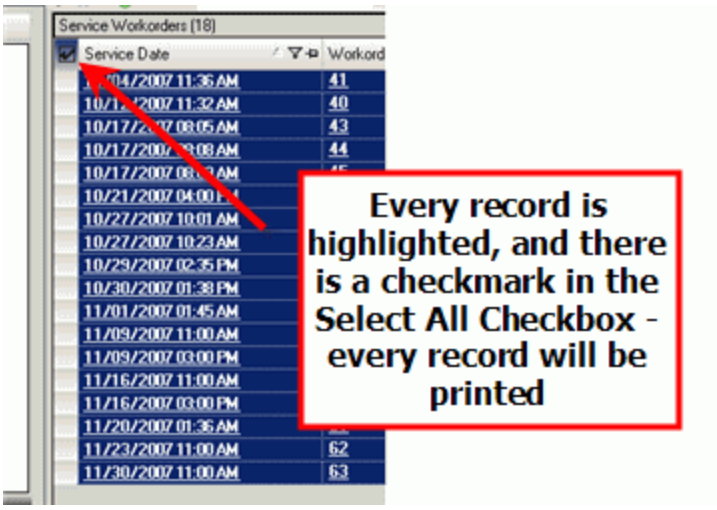
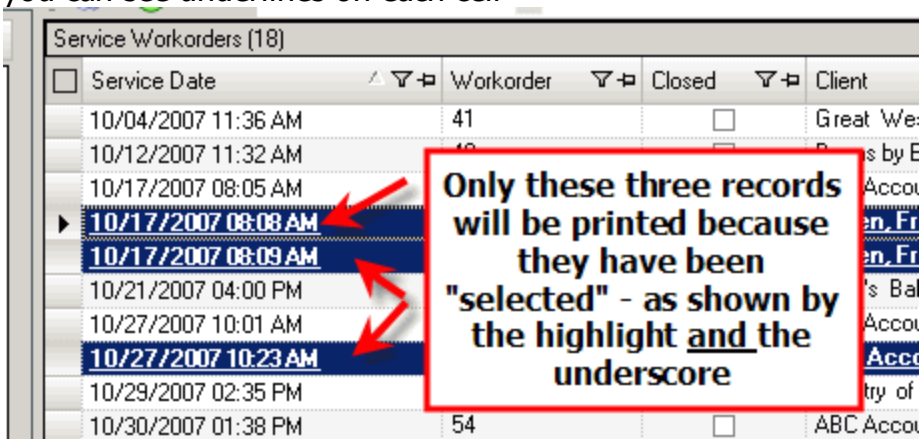


If a specific record is selected, only that record's data will be printed when select Print from the grid menu. **NOTE**: a record is selected when it is highlighted **and** you can see underlines on each cell



More than one specific record can be selected from an entire list of records by holding the CTRL key and using your mouse to select different records.

Or select multiple records by selecting the first record, and then hold the SHIFT key and select the last record - all records from first to last will be selected

Or use the filtering feature of AyaNova's grids to filter to display only records you want to print from.

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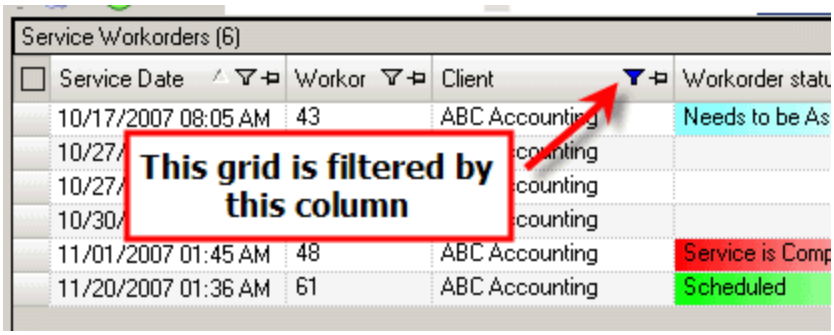
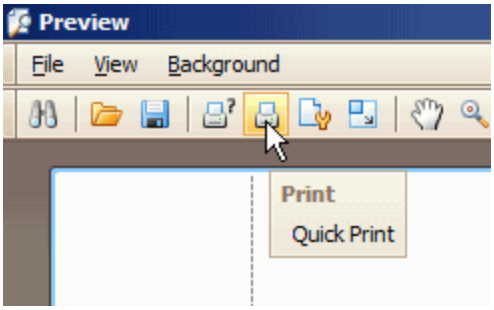


Unless a report template has specific over-riding internal settings, the data will be printed out in the same sort order the records are listed in the grid.

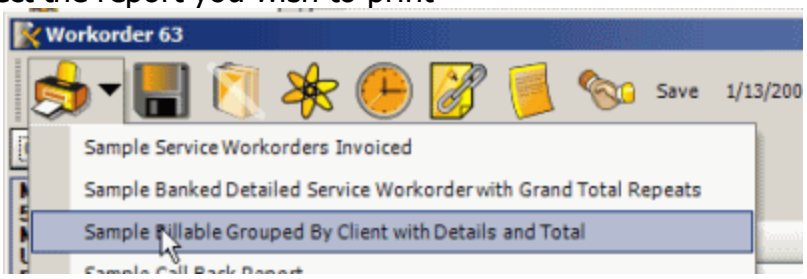
Once you have selected the report template for the records you want to print about, the Print Preview for this report will display. Now just select the Print menu option to print to your default printer.



See also:
[Filtering a grid]
[Sorting a grid]
[How do I filter a grid and print a report for the records that show]?

4.14.2 Printing from an entry screen

To print from any entry screen, select that entry screen's Print menu option, and select the report you wish to print



- Do not forget that you do need to select Save **before** printing, otherwise your changes won't show on the report.

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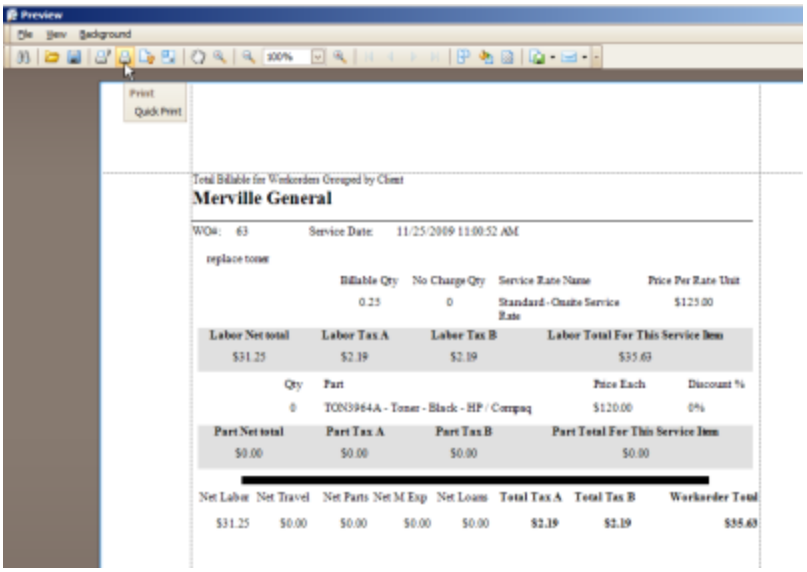
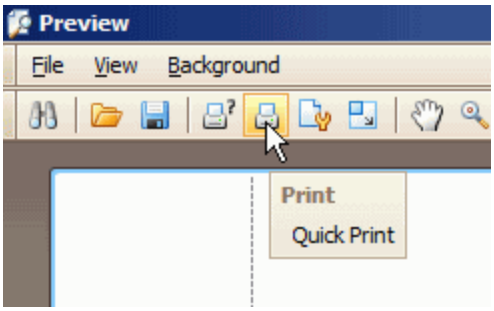
- Each object entry screen displays the same report template selections as the grid for that object.

  For example, the Service Workorder grid's report templates listed via the Print menu are the same report templates available for selection within the Service Workorder's entry screen

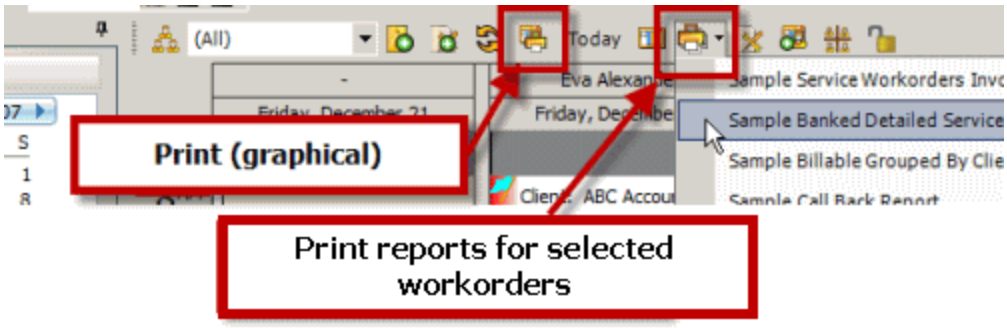
The Print Preview will display



Select the Print menu option to print to your printer



4.14.3 Printing reports from the Schedule Screen



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1. Select the workorder items you want to print - you can select more than one by holding the CRTL key and using your mouse.

2. Select the menu option **Print Selected Workorders** to display a list of Service Workorder report templates

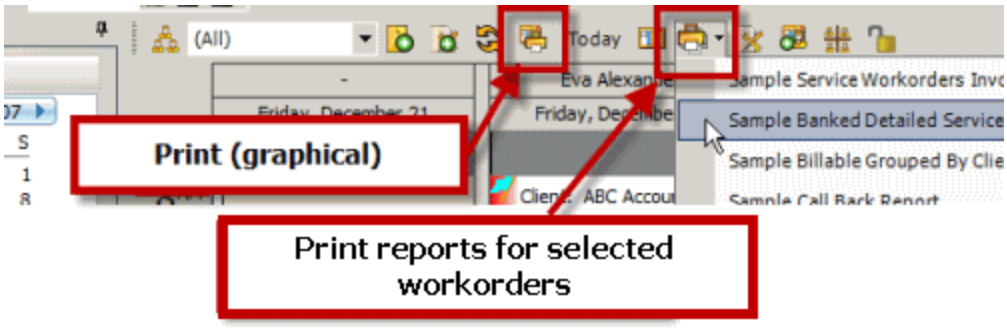
3. Select the report template you want to print based on those workorder items you selected.

This makes it even easier for the tech to view their schedule, select the workorder items they need print outs for, and print them out to go perform the service.

NOTE: The Print selected workorder items menu option only displays if you have selected one or more workorder items in the Schedule screen.

See also:
How do I print out dispatches for myself from the Schedule screen?

4.14.4 Graphical printout from Schedule Screen



Select the Print menu option to bring up the Page Setup window where you can select the Style Name:, Start Date and End Date, the time range, and if a specific resource.

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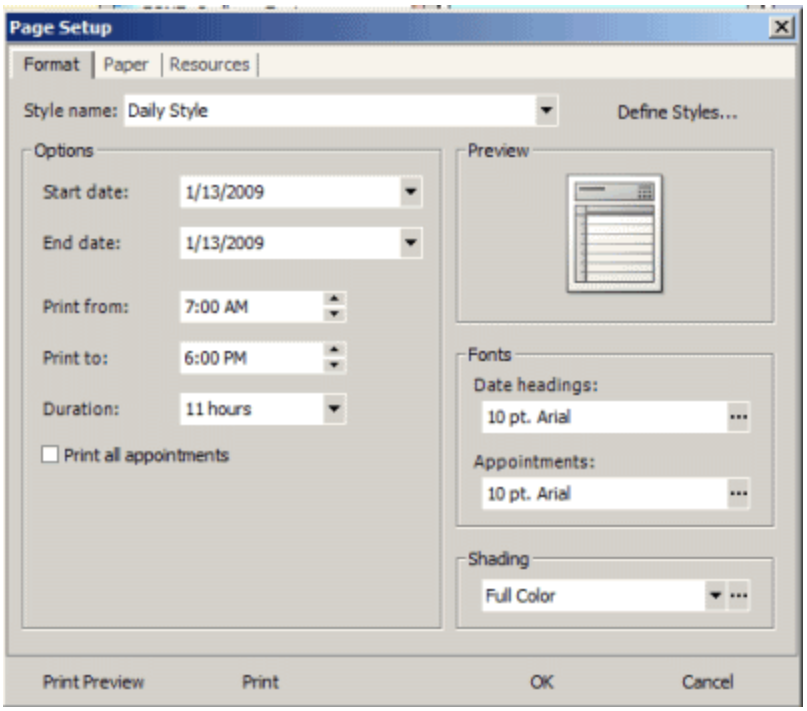
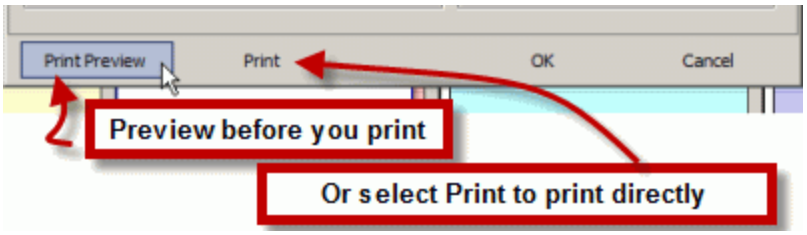


NOTE: This Print graphical option **requires** that you specifically state what you want to print in this Page Setup **before** you can preview or print. It does **not** rely on what you were showing in the Schedule screen nor what you selected in the Schedule screen.

We encourage you to try different Styles, etc to get the graphical print out you want. Preview to see what it looks like.



See also:
[How do I print out a graphical day view of the Schedule?]

Identification of fields of the Page Setup window:

Format tab:

Style Name:

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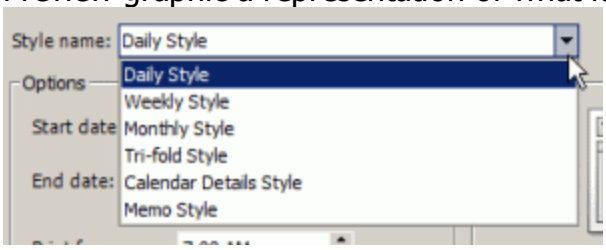
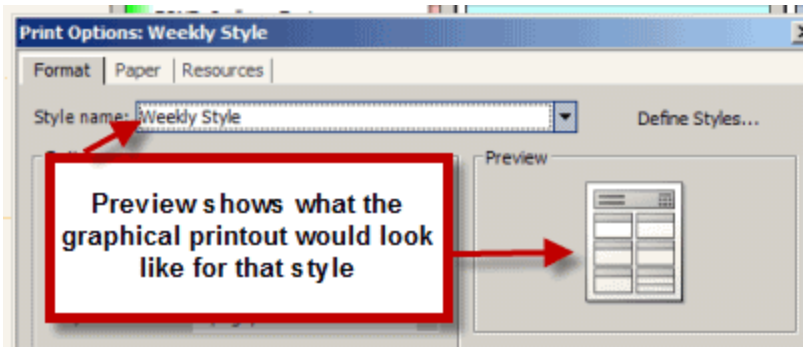
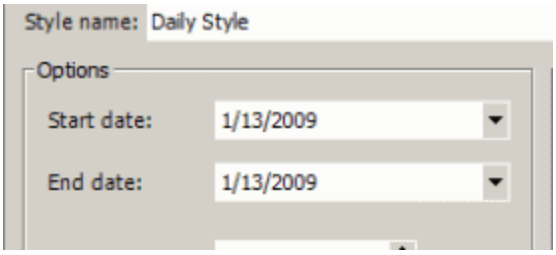
This identifies what view type you want printed out - and you can see in the Preview graphic a representation of what it would show





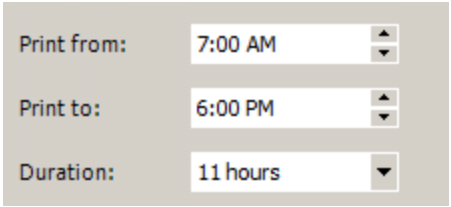
Start Date: and **End Date:**
Specify here the start and end date of the graphical view you want to print out. For example, if you want to print out a Daily Style, then edit the start and end date to be the same date.

These dates **always** default to today's date. There is not a setting to change the default



Print From: and **Print To:**
Specify the start and end time in these fields

These times default to 7:00AM to 6:00PM. These is not a setting to change the default.



Duration:

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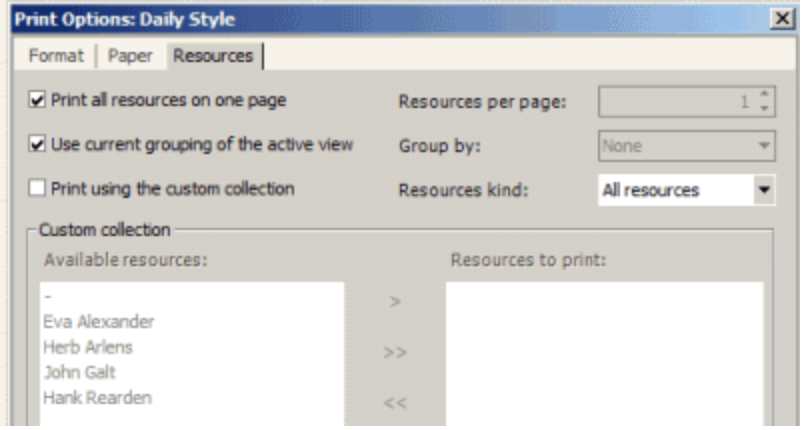
This is tied to the Print From: and Print To: setting. If you select 12AM to 8AM for your Print From: and Print To: this would be 8 hours.

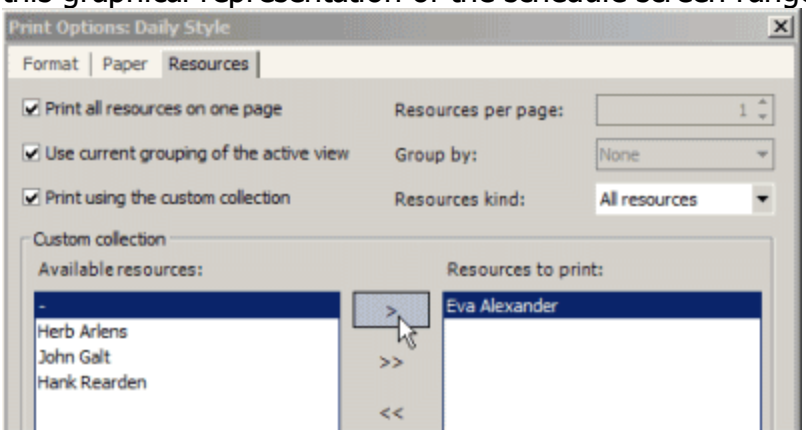
Resources tab:

The following is only applicable if using the full AyaNova version.

On first opening, this tab will default to print all the resources on the same page - scheduled items for all schedulable users .



If instead you checkmark the **Print using the custom collection**:, you will be able to specifically select which resources (schedulable users) you want to print this graphical representation of the schedule screen range for.



4.14.5 Exporting a report to a file

In some cases, instead of printing a report to your printer, you might want to have the report saved to a file

1. In the Print Preview screen of a report, select File -> Export Document... -> the format you want the report saved in

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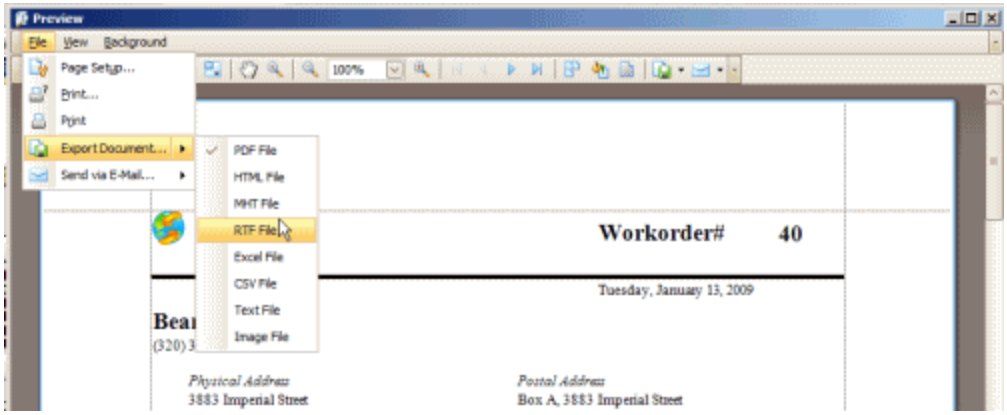
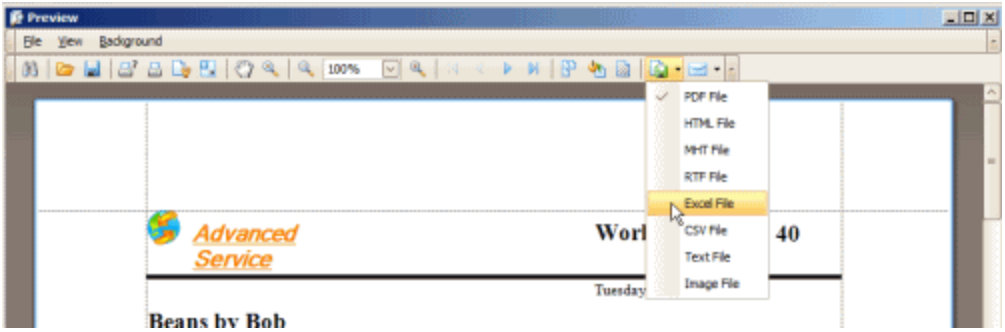


The Print Preview screen displays whenever a report template is selected. There is not an option to disable the Print Preview.

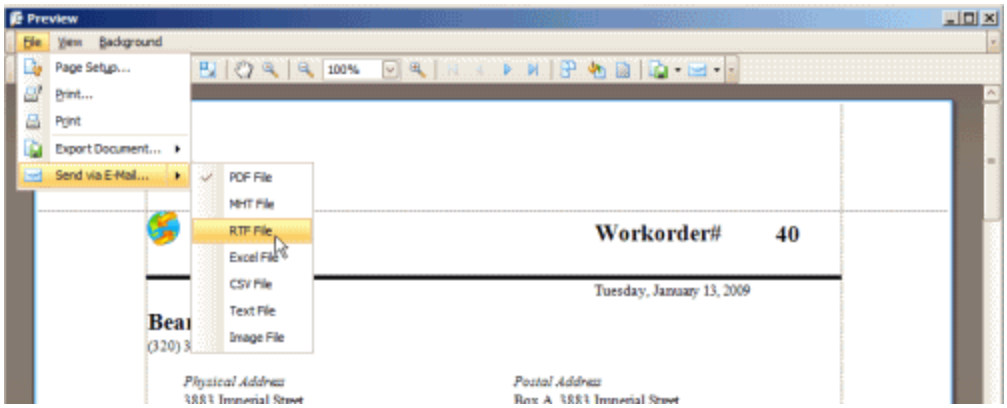
2. Or select the menu option Export Document... and the format



4.14.6 Sending a report via email

You can email a report directly from the Print Preview window

1. In the Print Preview screen of a report, select File -> Send via Email... -> the format you want the report saved in



The Print Preview screen displays whenever a report template is selected. There is not an option to disable the Print Preview.

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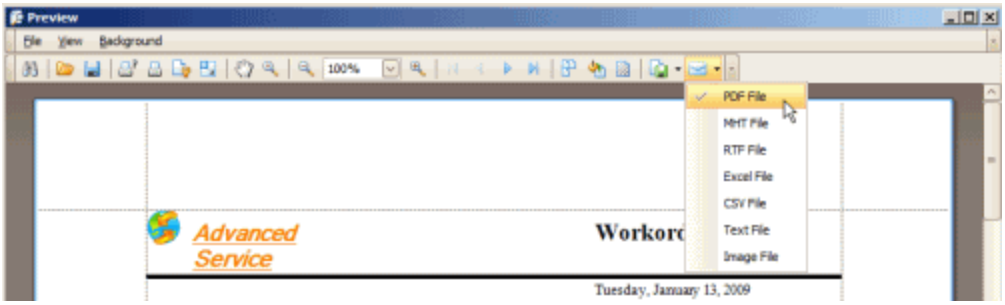
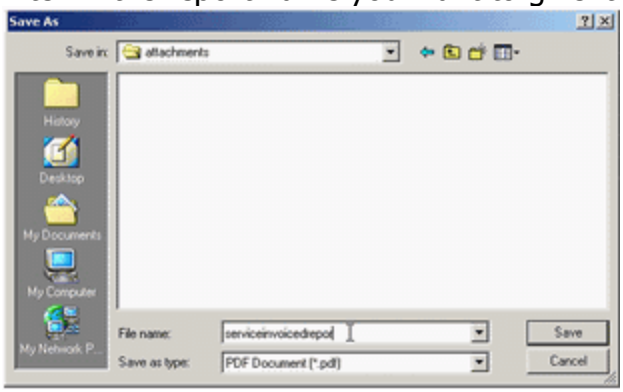
2. Or select the menu option Send via Email... and the format

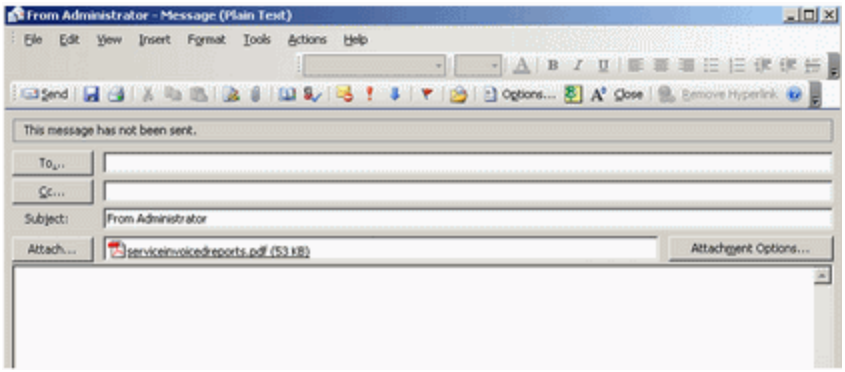


3. Enter in the report name you want to give it and save the file



4. Then your email program on your computer will open with that document already attached ready to be emailed

Below is a screenshots after having selecting PDF file as the format, editing the filename of the attachment, and your default email program automatically opening with the file attached with the subject line "From (username)" where (username) is the name logged into the computer as.



4.14.7 Changing printers

By default, AyaNova will print to your Windows default printer.

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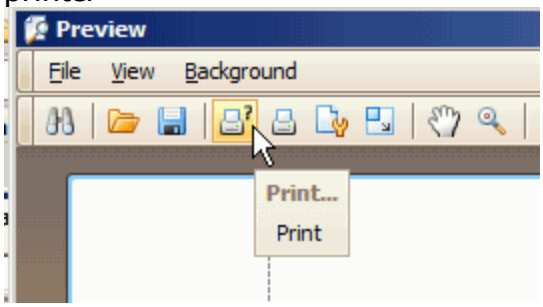
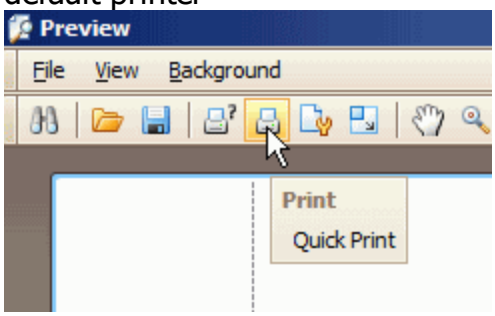
If the report you want to print should be printed to a different printer, select the menu option **Print...** in the Print Preview so that you can select the specific printer



Whereas if you select the Quick Print, the report will print to your Windows default printer



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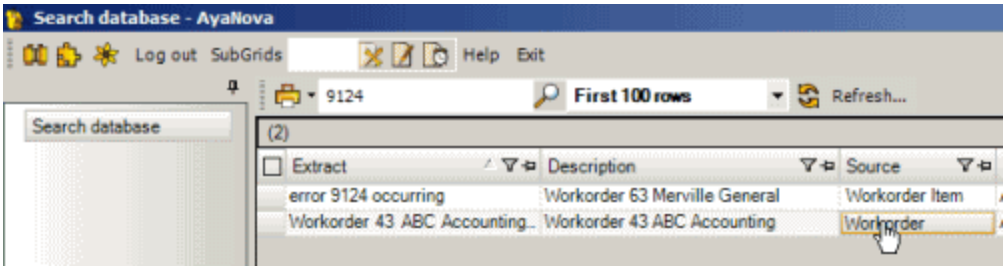
4.15 Search Database

Use the Search Database feature to perform a search on text **entered by users** in AyaNova.



The Search Database feature allows wildcard searches and multiple word searches.

Wildcard search

You can use the asterisk wildcard character at the start or end of a word to find all records that partially match your search word.

For example "cab*" would match the word cable or the word cabinet. Wildcard is asterisk character * and can be used at the start or end of any term in the search phrase: "*sun*" would match "Samsung", you can also do it more than once so "*sun* not*" would match "Notes about Samsung"

Multiple word searches

You can enter multiple words and AyaNova will return search results with the words in the exact order, as well as within the same text field but not necessarily in that exact order.
AyaNova will display rank indicating whether the words are found close to each other.

Combination of both

You can enter search terms that include the wildcard character, as well as multiple words.

For example, you may enter in "install* software" to return any records that have both the text install and software, whether install is part of the word installation or not, etc.

Stop Words

Words such as "the", "same", "not", "between" etc are common words that are excluded from searches.

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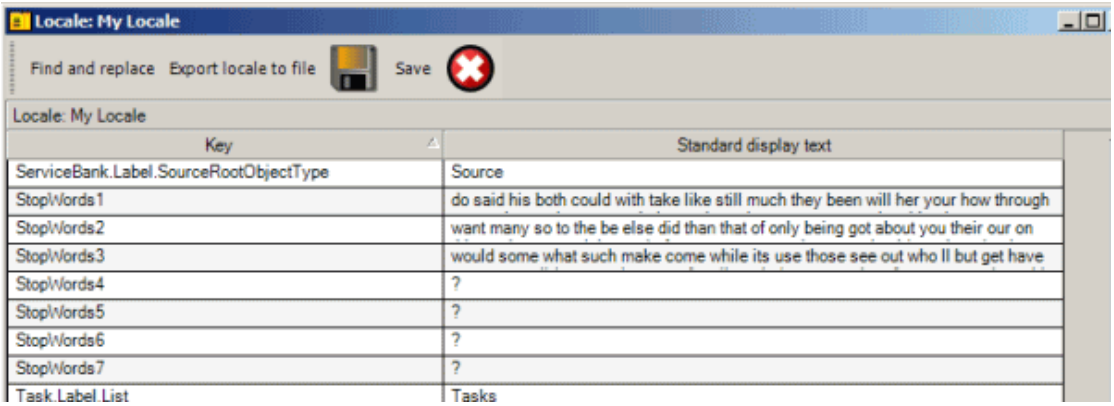
You can edit what stop words to use via creating a custom locale, and editing the StopWords Keys. And with StopWords being set via the locale used, you can enter your own common words in the language of your locale

For example, if you have a client whose name is Between Company, and you want to be able to perform a search on the text between, you would create a custom locale that does not include this stop word

Refer to How do I create and/or customize an existing locale? for an overview of customizing a locale



NOTE: Entering in a client's name into the Search Database feature DOES NOT return all workorders where this client was selected. That is NOT the function of the Search Database feature. If you wanted to view all workorders for a specific client, see Listing all workorders for a specific client

NOTE: If your organization will be entering CJK text (Chinese, Japanese, or Korean) language characters, it is recommended that you set this within Global Settings to True

Use CJK Index	**True**

Do **not** set Use CJK Index to True if you are utilizing any other language other than Chinese, Japanese, or Korean as it will affect the speed of indexing.

Columns of the Search Database grid:

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Rank	Identifies the internal ranking of the search term	
Source	Identifies the object where the search result was found For example: if Source displays Workorder, then the search result was found in a Workorder header (which may be a service workorder, quote or pm). It Source is Unit Model, then the search result was found in a Unit Model entry screen.	Select this field to open the object where the search result was found
Description	Provides a brief description of the source For example: if the source is a workorder, this column will state the whether a Preventive maintenance, quote or service workorder, the number, and the client for whom the workorder is for.	
Extract	This column "extracts" or displays the contents of the field from where the search term was found.	If you place your mouse over this column field, a popup will display the entire extraction
Record Created	Displays the date this object was first created	
Record Created By	Displays who first created this object	
Record Last Modified	Displays the date this object was last modified	
Record Last Modified By	Displays who last edited this object	

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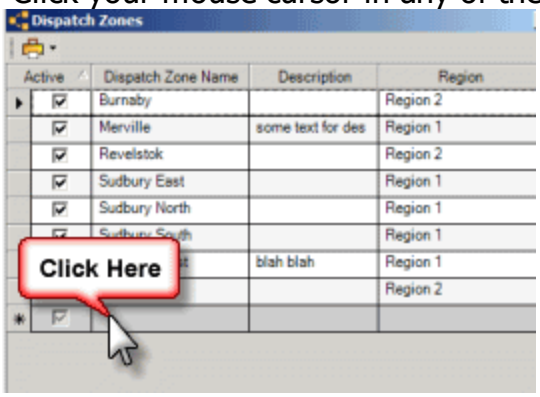
4.16 SubGrids

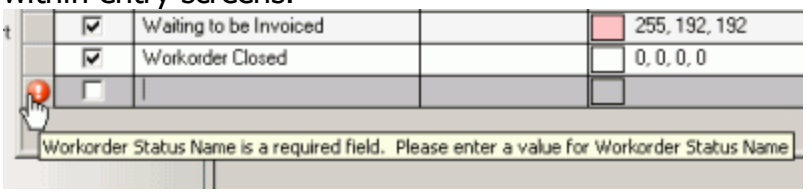
4.16.1 How to add / edit / delete / make inactive

To add new data into a subgrid table:

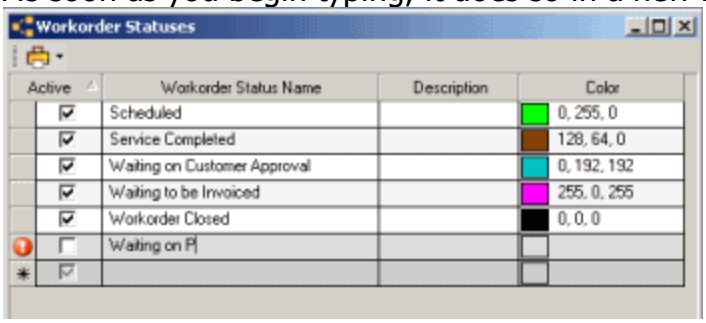
Click your mouse cursor in any of the columns in the grayed row.



This begins a new row that you can enter data in. You may also note the red exclamation mark which reminds you of required fields – in the screen shot below, Name is a required field so that the Workorder Status can be selected within entry screens.



As soon as you begin typing, it does so in a new row.



To edit an existing row of data

just click your mouse in the column field that you want to edit and do so.

Two ways to delete an existing row of data

1. Select the Delete option for that row

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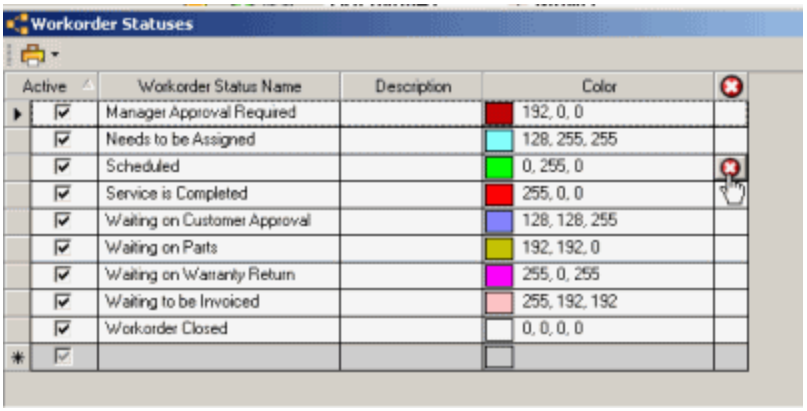
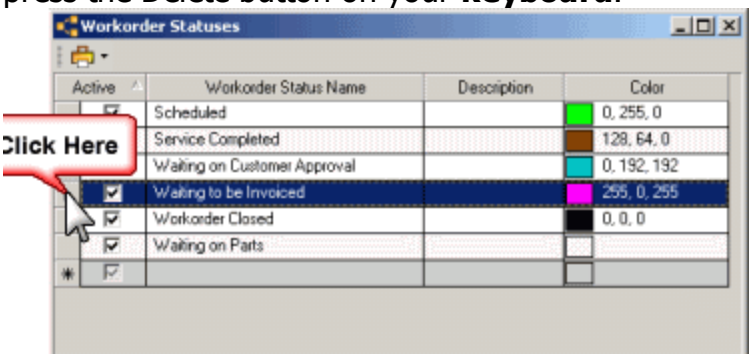


2. click your mouse on the row header which will highlight the entire row then press the Delete button on your **keyboard**.



If the row of data has been linked elsewhere in the database, you may not be able to delete that record.

Do note that some grid tables are controlled for accountability, once a row is entered, cannot be deleted even if it appears to have not yet been selected elsewhere – such as Tax Codes. If you do not want this item selected, uncheck the **Active** field for that item.

To set an existing row of data to inactive

Just uncheck the Active field for that record row, and exit out of the subgrid to save.

The screenshot below shows that the Dispatch Zone Sudbury South is inactive, and as a result will not be displayed in an selection lists elsewhere in AyaNova.

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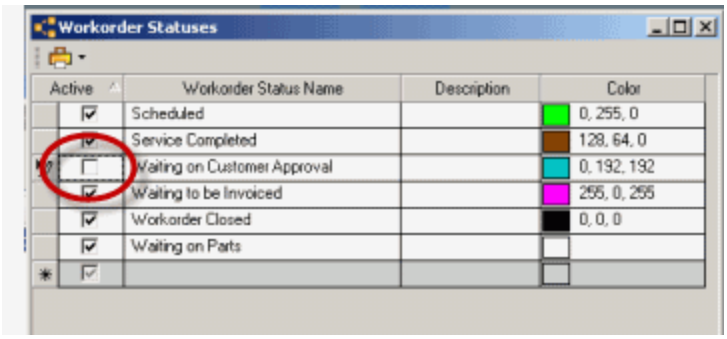


4.16.2 Part Categories

What's it for:

Part categories are used to group similar parts together.

An example would be to group all bike components together if you are a sporting service store.

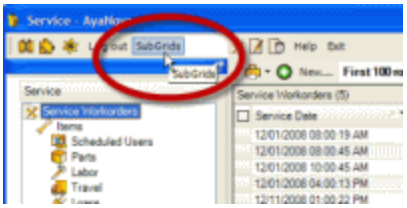
If you use Part Categories, you may want to set the Global Settings - part name format to display drop down selection lists based on the category name.

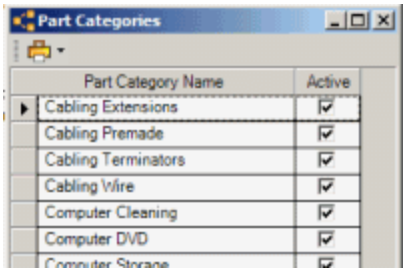
You could also localize this subgrid to use for other grouping purposes. Refer to the section on Localization for details.

Use of Part Categories is optional in AyaNova.

Where to access the Part Categories subgrid:

- from the SubGrids menu bar





- from the Part entry screen jump button for Part Category

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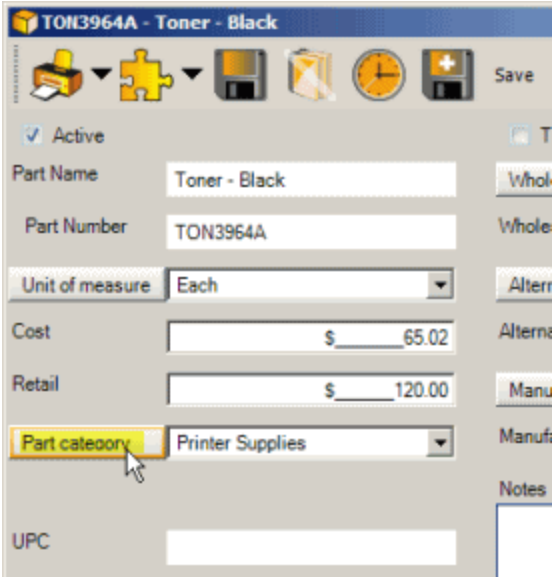

Where selected and used:

- selected within the Part entry screen
- displays in the Part name if set in Global Settings - part display name
- available in reports from the Part grid

You will note that the categories listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these categories.

4.16.3 Part Assemblies

What's it for:

Part assemblies are used to group parts together for filtering, grouping and reporting purposes.

If you use Part Assemblies, you may want to set the Global Settings - part name format to display drop down selection lists based on the assembly name.

You could also localize this sub-grid to use for other grouping purposes.

NOTE: A part assembly itself does **not** have a price as it is to group parts together for assemblies (i.e. parts of a bike) as opposed to Part Category which is to group similar parts (i.e. all bikes or all sporting equipment)

Use of Part Assemblies is optional in AyaNova.

Where to access the Part Assembly subgrid:

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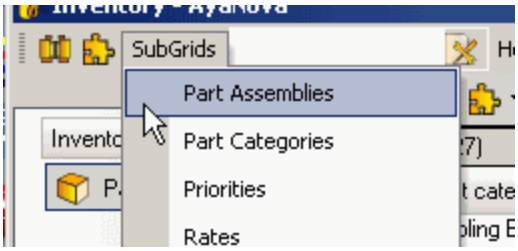
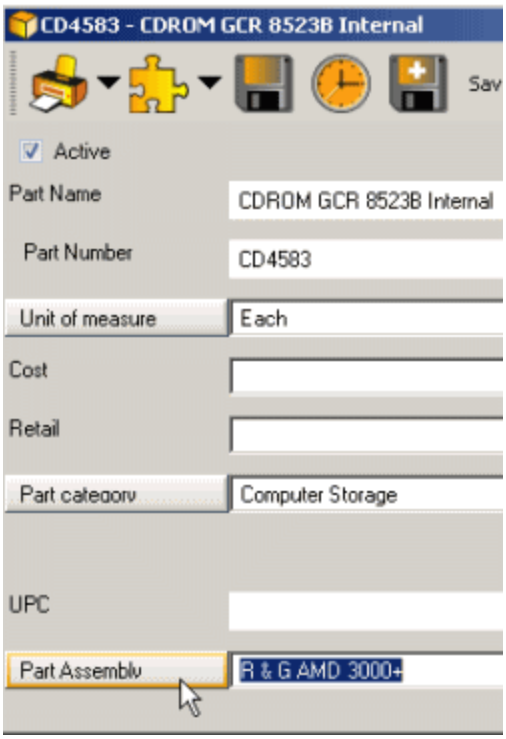
- from the SubGrids menu



- from the jump button within the Part entry screen



Where selected and used:

- selected within the Part entry screen
- displays in the Part grid in the Inventory navigation pane
- displays in the Part name if set in Global Settings - part display name
- available in reports from the Parts grid in the Service navigation pane

You will note that the assemblies listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these assemblies. You can edit these and add additional as you like.

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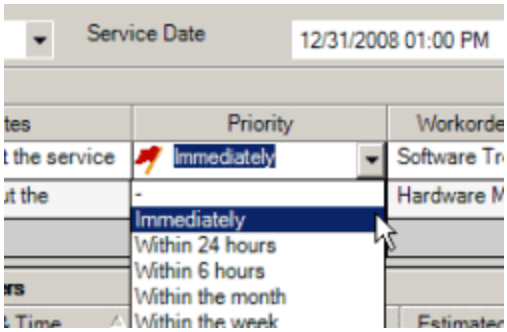
4.16.4 Priorities



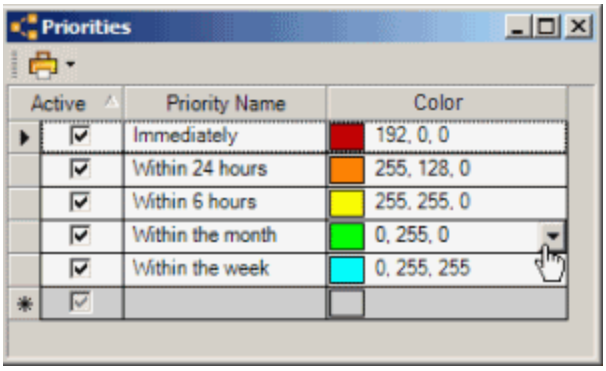
What's it for:

A priority can be used to signify how important a workorder item is, or how urgent a workorder item may be.

Use of Priorities is optional in AyaNova.

How to access the Priorities subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the Workorder Item menu options menu bar in a service workorder, a quote and in a preventive maintenance when the workorder item has the focus



The Color column in the Priorities subgrid

In the Priorities subgrid, the Color column is a drop down field where you select the color of the flag that a workorder item with this priority will display as when viewed on the Schedule screen.

Where selected and used:

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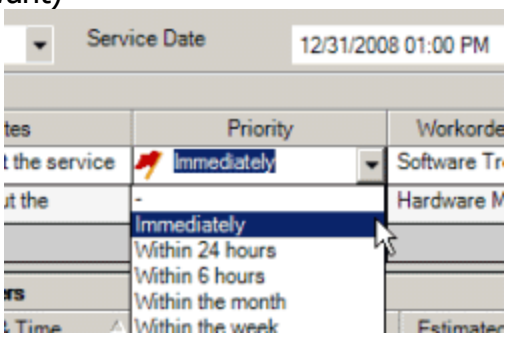
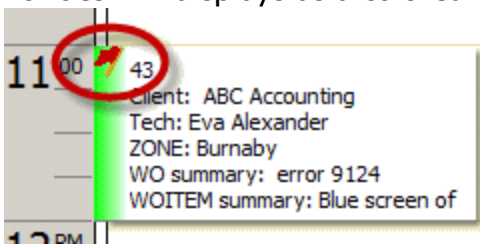
- Priorities are selectable from the Service Workorder Items subgrid in a service workorder, a quote and in a preventive maintenance item (the Priorities listed in screenshot below are just examples, as you can create whatever priorities you want)



- Priorities will displays as a colored flag in the Schedule screen scheduled item

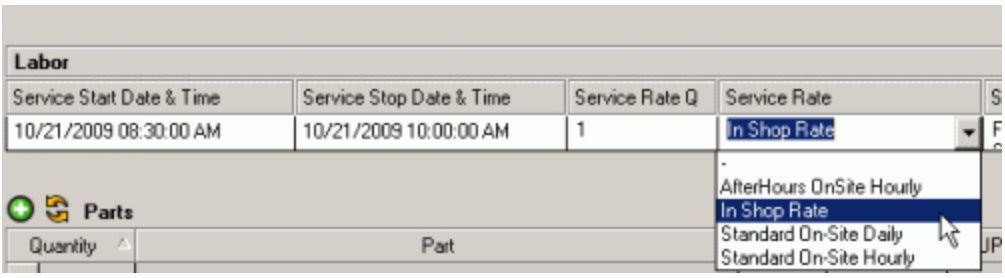


- displays as a column in the Items and below grids, Quote Items and below grids and PM Items and below grids so that you can filter by it

- available in reports from Service Workorders, Quotes and Preventive Maintenance grids and entry screens.

You will note that the priorities listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these priorities. You can edit existing which would affect all orders where this priority was previously selected; you can delete existing (if not selected within orders), and you can create new priorities for selection.

4.16.5 Rates



What's it for:

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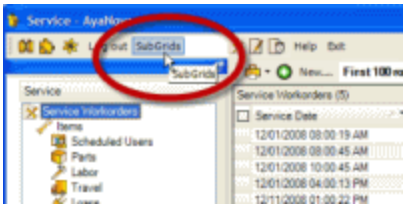
Rates are used to indicate charges on workorders to the customer and as summarized data on various reports.

You can have as many rates as needed.

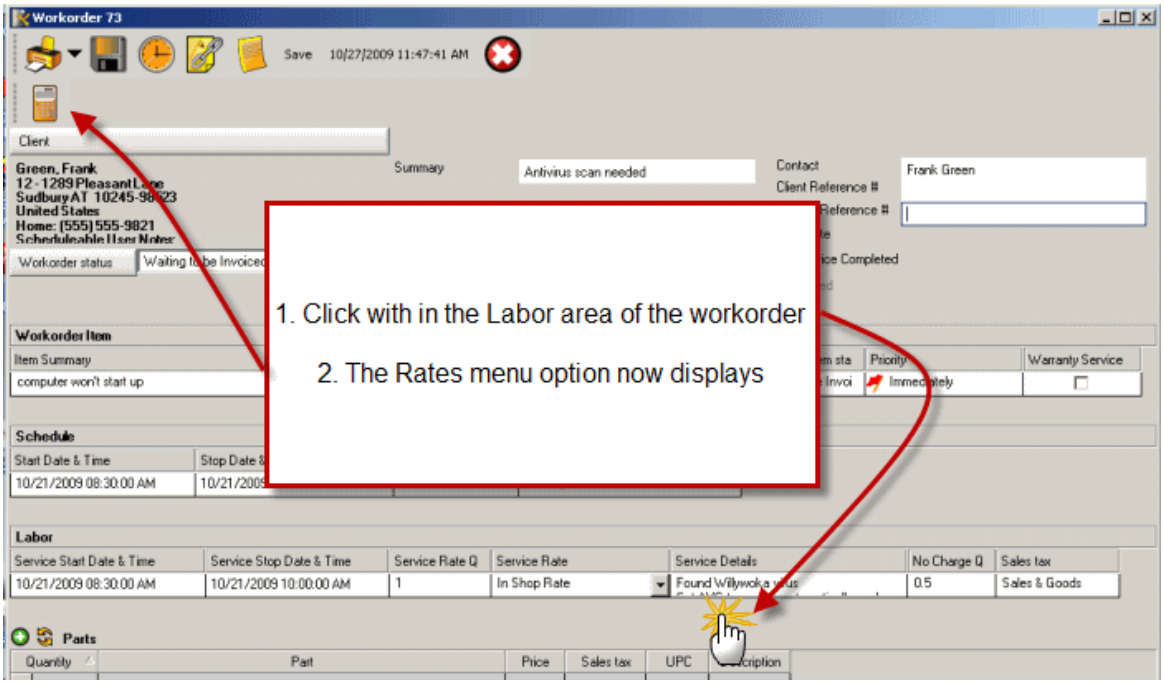
NOTE: Changing the rate on the rate entry / edit screen affects all work orders previously entered since they are all linked to the rates, they don't have the rates stored with the work order problem item. For this reason, if you increase or change your rates, you should create a **new** rate rather than edit an existing rate once it has been selected in existing work orders.

How to access the Rates subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar



- accessed from the menu bar in a service workorder when the Labor subsection has the focus



Where selected and used:

- within the workorder items subsection Schedule, or within workorder items subsection Labor

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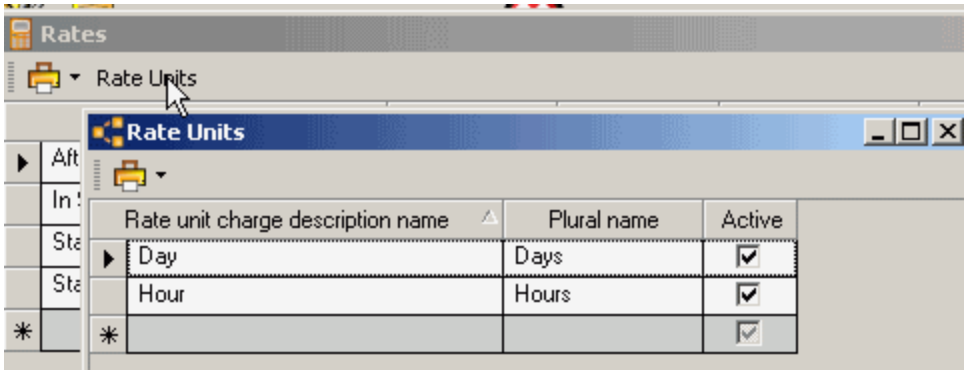
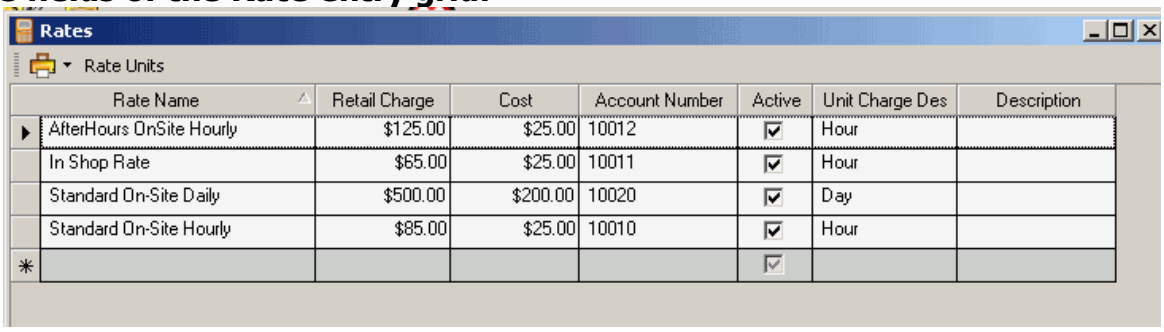
- displays as a column in the Scheduled Users grid and Labor grid so that you can filter by it
- available in detailed reports from Service Workorders, as well as from summary reports from the Labor grid

The menu option of the Rate entry grid:



Rate Units toolbar option
Select this toolbar option to open up the Rate Units entry grid such as hours, each, etc.

The fields of the Rate entry grid:



Active column
This is a checkbox field where you indicate whether the rate is active or not. A checkmark indicates an active rate and will have this rate display in drop down selection list for the type of rate it is (unless specified as a Contract Rate – see below). An inactive is not checked, and will not display in drop down selection lists. This is typically used to set an old rate inactive when a price changes so that users will not select the old rate.

Rate Name column
This is a text field where you indicate the name of the rate that will display in the drop down selection list.

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Description column
This is a text field where you may enter additional information or description for internal use for this rate. The Description field is limited to 255 characters.

Account Number column
This is a text field where you would enter the account number associated with the rate. This is useful for when printing out the completed workorder report, you can see at a glance what account number to bill out the rate at.

Cost column
This is a currency field where you would enter the costs associated with the rate. This is typically used to generate profitability reports. Although the screens-shot displays a $ symbol, the currency symbol that will display on your computer will depend on the currency symbol selected within your Windows Regional Settings.

Retail Charge column
This is a currency field where you would enter the charge to the client associated with this rate based on the rate units (see below). Although the screen-shot displays a $ symbol, the currency symbol that will display on your computer will depend on the currency symbol selected within your Windows Regional Settings.

Rate Unit Charge Description column
This is a drop down selection field where you may select the units associated with the rate. For example, if you will be entering in quantity based on hours for the service rate, then select a Rate Unit Charge Description of "Hours"

You will note that the rates listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these rates. You can edit existing which would affect all orders where this rate was previously selected; you can delete existing (if not selected within orders), and you can create new rates for selection.

4.16.6 Tax Codes

What's it for:

Tax codes are used to indicate taxes to be charged on parts and services in reports.

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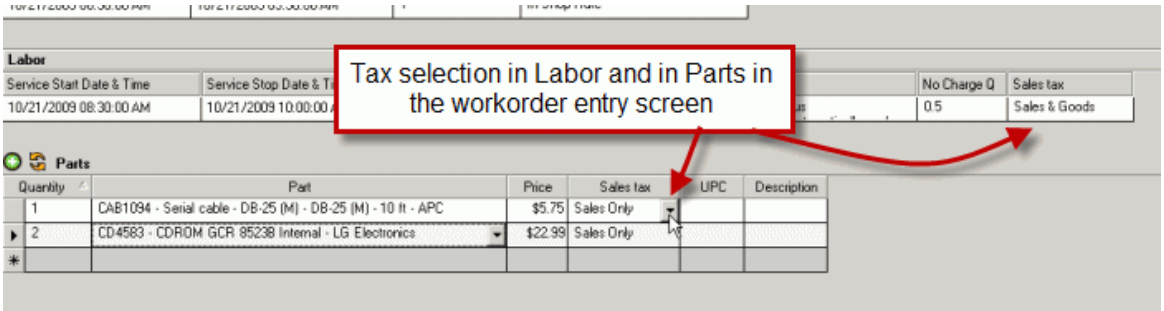
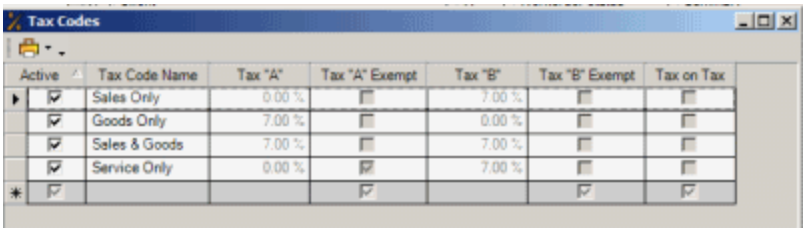


- Once a tax code has been entered and the Tax Codes grid closed (which automatically saves) the tax code can **not** be deleted. You can edit the name of the tax code after it has been changed, but **not** delete the tax code.
- You can set a tax code to inactive so that it no longer displays for selection as long as not set as a default in Global Settings.
- AyaNova has three sample tax codes pre-entered. If you will not use these percentages then create your own tax codes percentages, set defaults in Global Settings, and then return to the Tax Code grid to set the tax codes to inactive that you will not use.
- You can create as many different tax codes as you need.
- You can set a default tax code for purchases of parts, for sale of parts, and for labor service charges via the Global Settings under Administration. Setting a default for these means less selection when purchasing parts or selling – but still allows you to select specific when needed.
- Use of Tax Codes is optional in AyaNova, as you can certainly just create a tax code that has 0% and set as your defaults in Global Settings, and remove taxes from showing in any report templates.

Refer to How to add/edit/delete/make inactive records in a subgrid

How to access the Tax Codes subgrid:

The Tax Codes grid is accessed from the SubGrids menu bar in the main navigation pane menu bar



Where selected and used:

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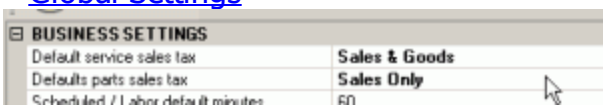
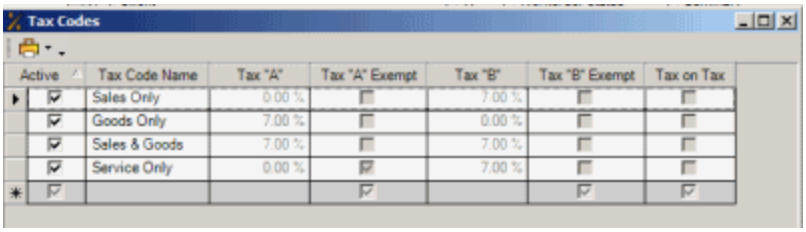
- defaults set for and Default service sales tax and Default parts sales tax in Global Settings



- selected within a service workorder's Labor
- The actual tax values based on the Tax Code selected displays as columns in the Labor grid
- Taxes are available in detailed reports from Service Workorders, and from summary reports from the Service navigation pane sub grids such as Parts and Labor



The columns of the Tax Code grid:

Active column
This is a checkbox field where you indicate whether the Tax Code is active or not. A checkmark indicates an active tax code and will have this tax code display in drop down selection lists. An inactive is not checked, and will not display in drop down selection lists.

Tax Code Name column
This is a text field where you indicate the name of the Tax Code that will display in drop down selection lists in Purchase Orders, a workorder item sub-screen Parts, a workorder item sub-screen Labor, and a workorder item sub-screen Travel.

Tax "A" column
Enter the tax using decimals. When you tab or click out of the field it will display in %. For example, enter in .07 and tab out. The field will automatically convert to display as 7.00%

Tax "A" Exempt column
If checkmark within the Tax "A" Exempt column, that will cause that Tax "A" to revert to 0%

Tax "B" column

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Enter the tax using decimals. When you tab or click out of the field it will display in %. For example, enter in .07 and tab out. The field will automatically convert to display as 7.00%

Tax "B" Exempt column
If checkmark within the Tax "B" Exempt column, that will cause that Tax "B" to revert to 0%

Tax on Tax column
Tax On Tax indicates that where in AyaNova taxes are calculated, Tax B is applied to the total of the item plus the Tax A.

For example, if you had a tax code that was 5% for Tax A and 6% for Tax B, and the product the tax was applied to was priced at $10.00, - Tax A would be $0.50 ($10.00 * 5%) and Tax B would be $0.63 (($10.00 + $0.50 Tax A) * 6% Tax B)

4.16.7 Units of Measure

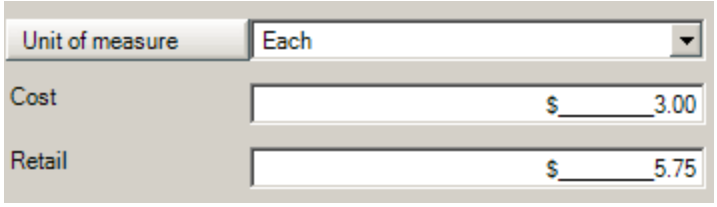
What's it for:

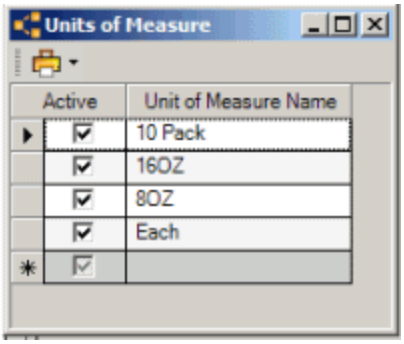
Units of Measure are used as the magnitude of the kind designated. For example, a part could be "each", "box", "case", "dozen", "gallon", "feet", "meter" etc

Use of Units of Measure is optional in AyaNova.

How to access this:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the Unit of Measure jump button within Part entry screen





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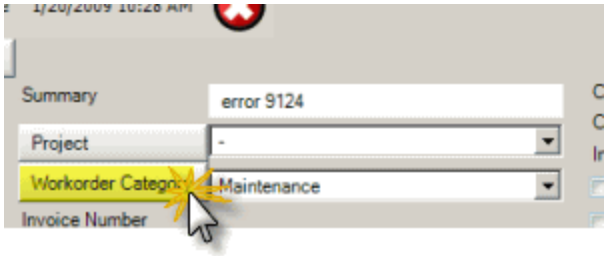
Where selected:

- Units of Measure are selected within the Part entry screen
- displays as a column in the Part grid
- in report templates from the Part grid

4.16.8 Workorder Categories



What's it for:

Workorder Categories are used to categorize the service workorder as a whole. This is useful for both filtering the Workorder grid and for generating management reports that are filtered by category. A category can be anything you want it to be.

For example: AyaNova may be used by a service business with different departments who want to see management reports based on each department separately such as an Internet department, a network department, an in house repair department. Three Workorder Categories may be created - "Internet Service", "Onsite Network Service", and "In-house Service". By selecting the specific category in the workorder, it will allow you to easily filter by the category in the Service Workorder grid so that you can run reports such as how much labor hours each different department billed out this month, what the response time from creation of the workorder to completion was for each department, etc.

Workorder Categories are optional in AyaNova.

The sample workorder categories in the AyaNovaLite sample database are just that - examples only. You can enter whatever workorder categories you wish.

How to access the Workorder Categories subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar

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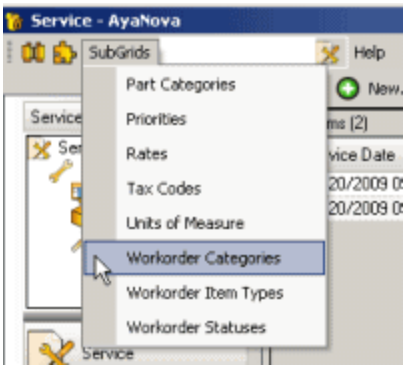
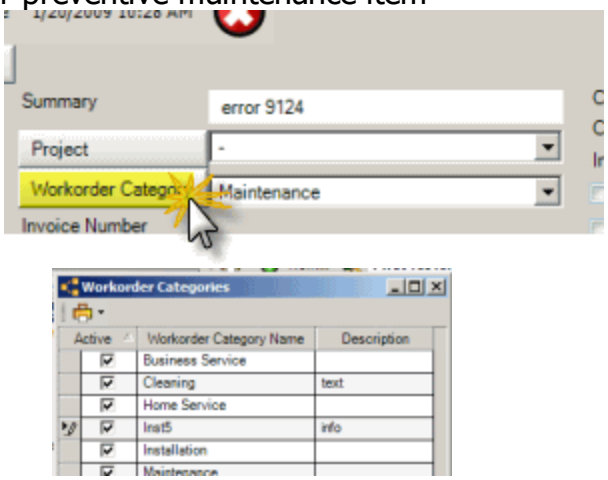


- via the jump button within the workorder header in a service workorder, quote or preventive maintenance item



Where selected:

- Workorder Category is selected within the workorder header for a service workorder

See also:
[Workorder - order header]

- displays in the Service grids

- available from reports from Service Workorders

You will note that the categories listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these categories. You can edit existing which would affect all orders where this category was previously selected; you can delete existing (if not selected within orders), and you can create new categories for selection.

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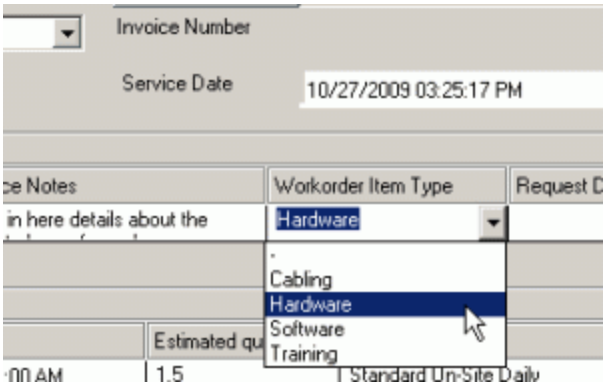
4.16.9 Workorder Item Types

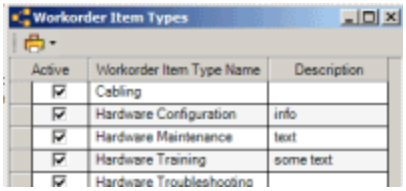


What's it for:

Workorder Item Types identify what type of service is being performed within the selected workorder item. This is useful for reporting and for filtering the grid view.

For example, if you run a yard and mower maintenance service business, you may want to identify lawn maintenance from yard repair like fence or gate repair. Or if you run a computer service shop, although the Workorder Category may be Networking, you may want to further distinguish the individual workorder items that are networking related even further such as Network Cabling, Network Configuration, Network Hardware, Network Software that are scheduled within the workorder item.

Workorder Item Types are optional in AyaNova. The sample workorder item types in the AyaNovaLite sample database are just that - examples only. You can enter whatever workorder item types you wish.



How to access Workorder Item Types subgrid:

- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from within the service workorder menu bar when the workorder item has the focus - Workorder Item menu options

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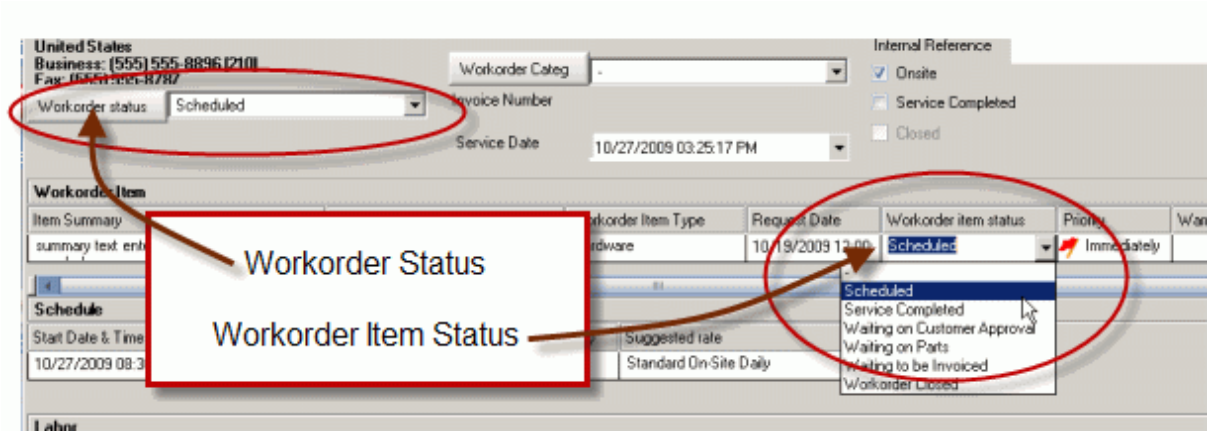
Where selected:

- From the Service Workorder Items grid in a service workorder item
- available in detailed reports from Service Workorders as well as summary reports through their sub grids

4.16.10 Workorder Statuses



What's it for:

A Workorder Status is used to indicate the overall status of a service workorder; or if selected in a workorder item, the status of the individual workorder item.

Workorder Status in a workorder:
Setting the overall status of a service workorder in the Service Workorder header field Workorder Status allows you to easily filter on the Service grids based on that status, as well as easily see at a glance what the overall status of the workorder is.

Workorder Item Status in a workorder item:
Setting the workorder status of an individual workorder item in the Workorder Item Status field allows you to easily filter on the Service Workorder Items grids based on that status, as well as easily see at a glance what the status of the workorder item is.

And by setting the workorder status for a workorder item, the color of that workorder status is shown in the Schedule screen calendar so that you can easily see at a glance what the status of that workorder item is.

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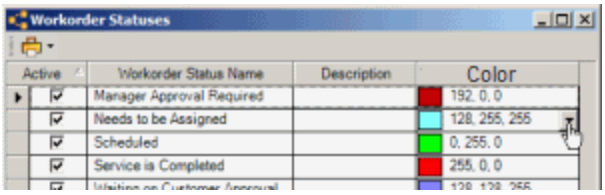
The sample workorder statuses in the AyaNovaLite sample database are just that - examples only. You can enter whatever workorder statuses you wish.

How to access the Workorder Statuses subgrid:

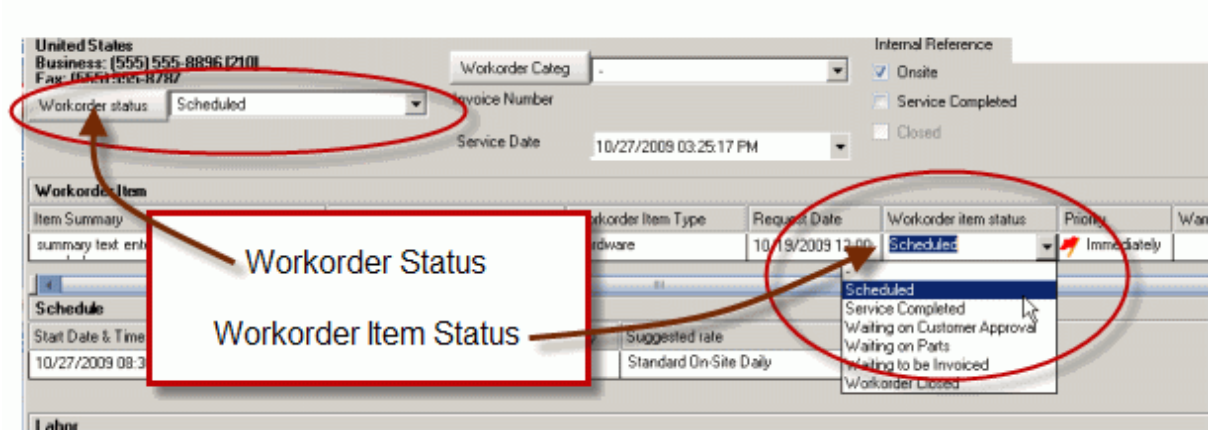
- accessed from the SubGrids menu bar in the main navigation pane menu bar
- from the jump button within the service workorder header Workorder - order header
- from menu option when in Items of a workorder - Workorder Item menu options



The Color column in the Status subgrid

The Color column in the Workorder Statuses subgrid is a drop down field where you select the color that a workorder item with this status will display as when viewed on the Schedule screen.

Select the color desired by clicking on the drop-down arrow to display the color selection tabs.



Where selected:

- within a service workorder within the service header and within a service workorder within the workorder item grid

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Selection in Service Workorder header:

The drop down selection field in the service header is used to indicate the overall status of a service workorder. It displays on the main Service Workorder list grid view and is useful to a service manager to determine the progress of a work order as a whole.

It might also be useful to other company staff when fielding questions from customers about the progress of their work order.

Status is strictly for visual display only and does not affect the operation of the program other than in conjunction with the notification feature if enabled.

See also:
Workorder - order header

Selection in Workorder Item grid:

The drop down selection field in the workorder item grid indicates the status for the individual workorder item. Do note that only Status set for individual workorder items display an associated color when viewed via the Schedule screen.

For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item's status.

See also:
Service Workorder Items

We provide both locations to indicate status so that your organization can use what works best for your situation. You can instruct your staff to only select Status from the workorder header; or you may instruct your staff to select Status from the workorder item; or you may instruct your staff to identify status in both areas.
For some organizations, they may wish to only identify status via the Workorder header – while other organizations usually because they have more than one workorder item per workorder, will identify each individual workorder item's status.

- Displays in the Schedule screen schedule item as the workorder item's status bar of color on the left side

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- Displays as an available field in detailed reports from Service Workorders as well as summary reports through their sub grids

You will note that the statuses listed in the trial AyaNova are for a fictional computer service company. You are not restricted to using only these statuses. You can edit existing which would affect all orders where this status was previously selected; you can delete existing (if not selected within orders), and you can create new statuses for selection.

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How do I ...?

5 How do I ...?

5.1 Erase the AyaNova database

Important:

- The AyaNova full-featured 45 day trial comes with data already entered so it is not just a blank slate and you can get an overview of how to use by reviewing the data already entered along with the information and tutorials in the manual.

- We **strongly recommend** that you **keep** that sample data while **first** familiarizing yourself with AyaNova as well as to refer to when you go through the How To's below.

- **All** data in AyaNovaLite is wiped when using the following feature **except** for the following:

Existing licenses
Global Settings
AyaNova Lite user
Tax Codes
Localized Text
Existing report templates
Workorder starting number will be +1 of last entered workorder number

Once you have followed along with the tutorials and familiarized yourself with every feature using the sample data, and now are ready to wipe the sample data and get started, **perform the following steps to erase**:

1. Be physically at the same computer where the AyaNova Lite database resides: **Do not be logged into the computer via remote access**

2. Run AyaNova Lite

3. Select the menu option **Help -> License**

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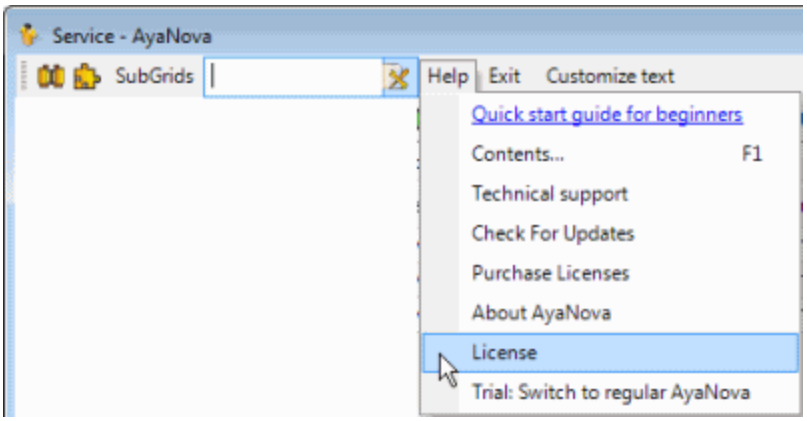
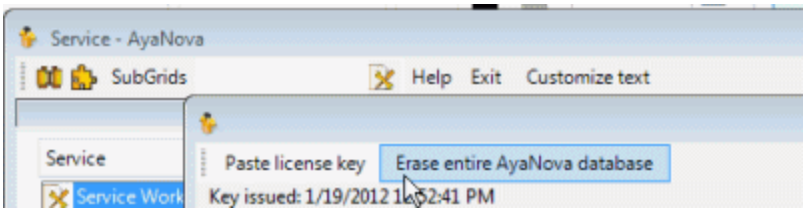


4. Select the menu option **Erase Entire AyaNova Database**



5. Select YES to proceed if this is what you wish

6. Allow the process to complete without interruption. AyaNova Lite will close

7. Run AyaNova Lite again.

8. You will now want to enter Global Settings, rates, clients, workorder statuses, and other objects that you will use in AyaNova - review the Suggested Order of Setting Up AyaNova Once Licensed.

9. Your first workorder number will default to +1 of the last workorder number before you deleted the database. It is not possible to restart at number 1 even though all data is deleted.

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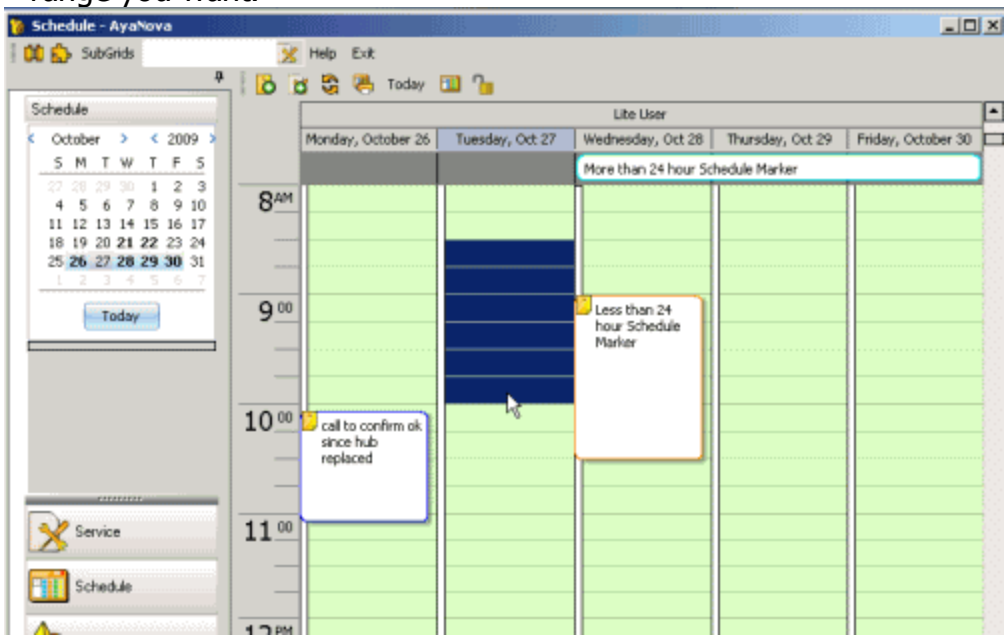
5.2 Schedule user for new workorder item via the Schedule Screen

You can schedule a user for a new service workorder in the workorder entry screen itself, or even easier, do so via the graphical Schedule screen selecting the time range on a specific date.

In this tutorial example, we will go over the basic steps of scheduling for a service workorder item via the Schedule screen.

- It is highly recommended that you review this Online Help entire section on Service Workorders and Schedule Screen for complete overview, suggestions on use, tips on use and more.

1. View the Schedule screen, and select a time frame that you wished scheduled.
   - Using your mouse, click on the starting time and drag your mouse down to highlight the total time you wish to schedule this user (you can always edit the time if you need to later)
   - In the example screen shot below we had clicked on the date Oct 27 to display the single day view for (All) users, and selected a start time of 8:30AM to 10:00AM - you can select whatever date and whatever time range you want.



2. With that time selected for that date, click on the New Service Workorder button on the toolbar. If you do not select a date, or date and time frame prior to selecting, AyaNova will assume you mean today.

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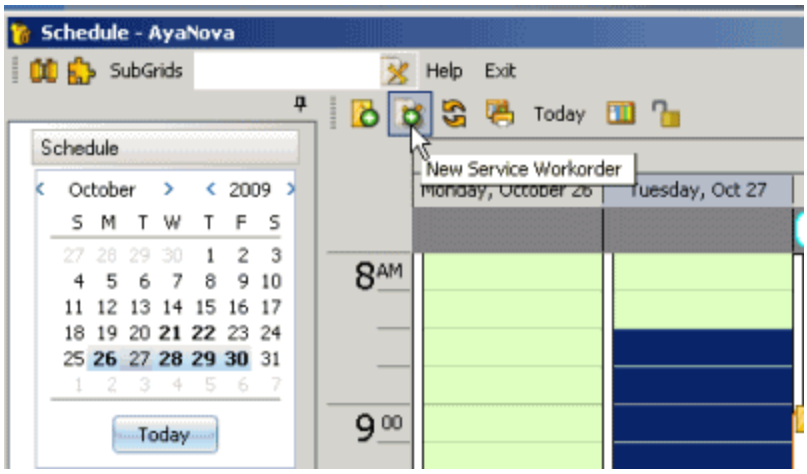
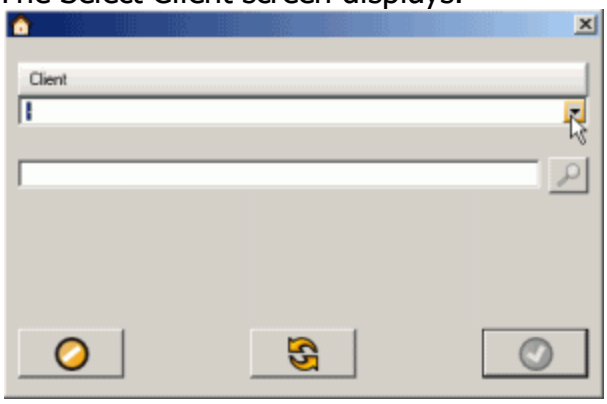
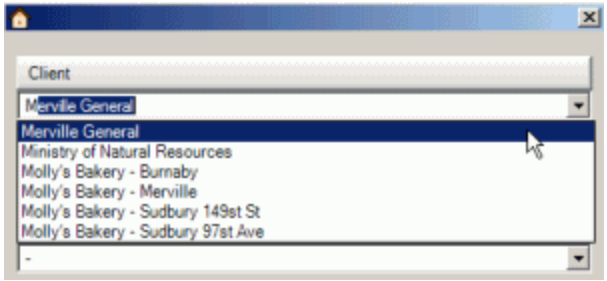


3. The Select Client screen displays.



4. You can either use your mouse to drop down the list of clients and scroll to the client name or you can begin typing in the clients name to "jump" to that client in the list.

5. Type in the letter "m" (without the quotation marks) which will "jump" the selection to the client Merville General



6. As this is the client we want, hit the ENTER key on your keyboard (or use the mouse to select the OK button)

7. A new service workorder will appear for that selected client, with the selected time frame and date for that user in the Scheduled Users sub-section of the workorder item.

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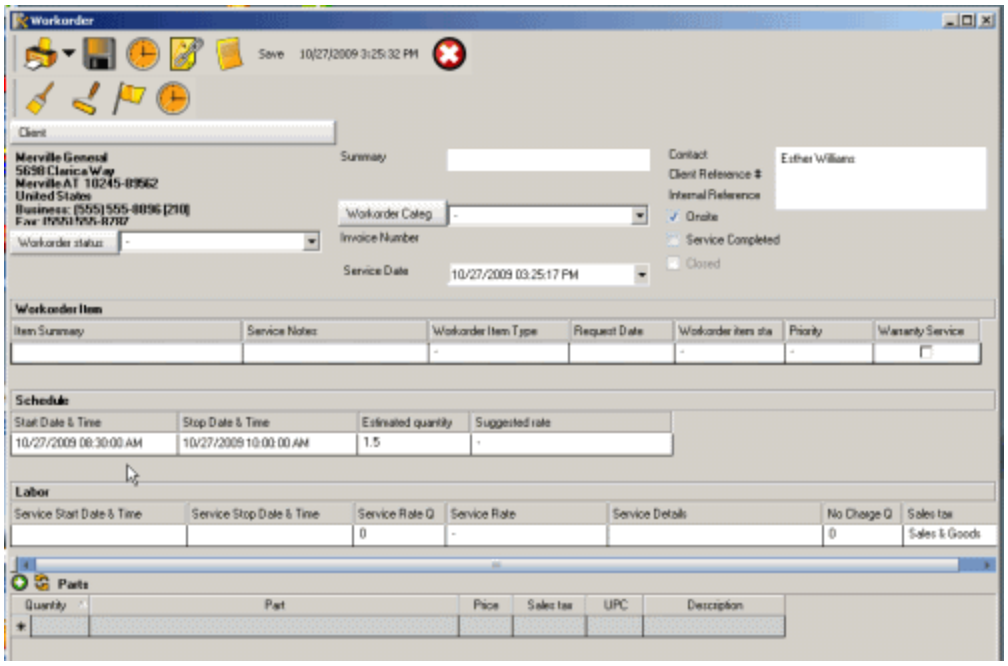

8. Enter in details of the workorder item such as entering a Workorder Summary and selecting Workorder Status; in the workorder item the Priority, Workorder Type and Workorder Item Summary and Service Notes; and in the Scheduled Users enter in the suggested rate (it will have pre-entered the Start and Stop Date for you and the Estimated Time)

   As we won't cover all the fields and selections in the various areas of the service workorder in this tutorial, it is recommended that you **do** review the Service Workorder section of this Help file for information on suggested use for the fields Workorder Status, Summary, Service Notes, Priority, etc
   - Order header area
   - Service workorder header area
   - Service workorder item

9. Save workorder by selecting Save from the menu bar at the top

10. Now that the workorder has been saved at least once, note the workorder number at the top of the workorder screen now

11. Close the workorder by selecting Save & Exit, or the X in the upper right hand corner of the workorder entry screen.

12. This returns you to the Schedule screen.

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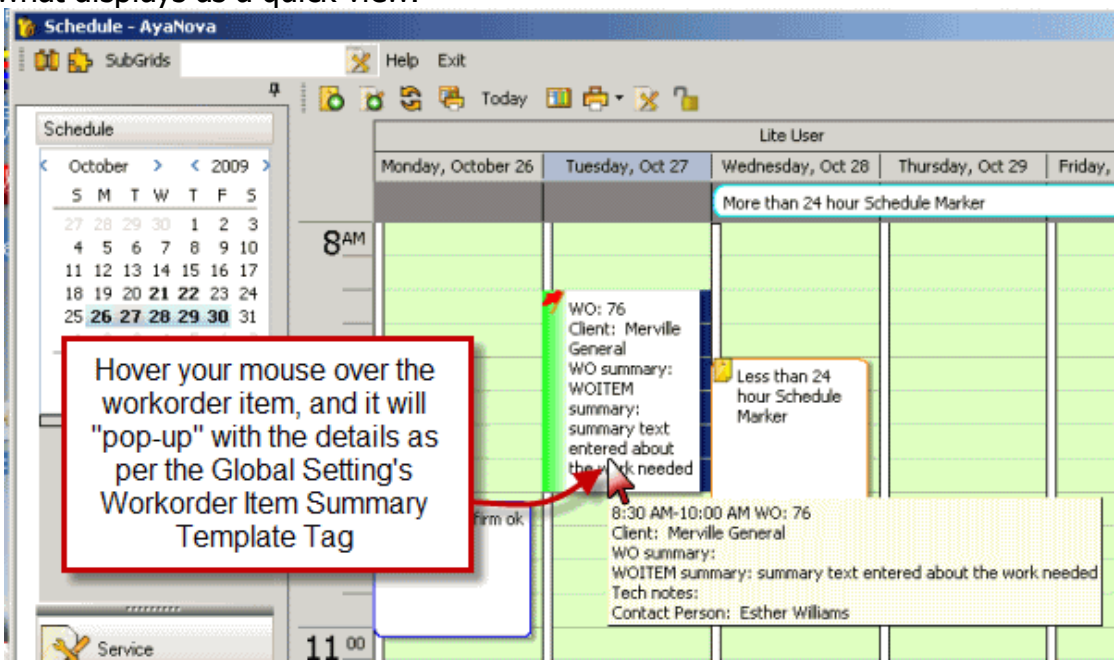
13. Select the Refresh menu option

. (grids will automatically refresh every five minutes so if you have just made a change, use the Refresh button to see right away)

14. The workorder item now displays. Hover your mouse over and you can see what displays as a quick view.



See also:
[How do I edit what pops up on Schedule screen for a workorder item?]

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5.3 Basic overview of a workorder

In this tutorial example, we will go through creating a service workorder and scheduling for service, entering details of the service that was performed, and printing out a report that can be used as an invoice to send to a client.

- It is **highly** recommended that you review this Online Help entire section on Service Workorders for complete overview , suggestions on use, tips on use and more.

The steps we will follow will be:

1. **Create the new service workorder for the client**
2. **Schedule your tech via the workorder**
3. **Details of labor service provided entered into the workorder**
4. **Set workorder to Service Completed**
5. **Invoice the billable items to your customer**

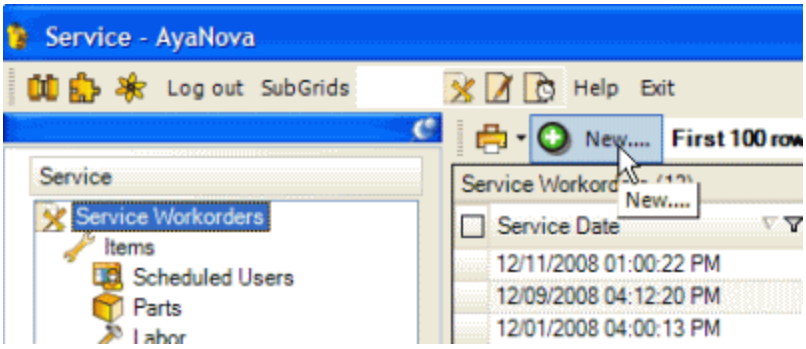
1. Create the new service workorder for the client

You can create a new service workorder many different ways - do review the following as they provide many time saving steps:

Create a new service workorder
Create new workorder for a client
Create via the schedule screen

In this example, we will

- select the menu option **New...** from the Service Workorders grid
- select the sample client **Green, Frank**
- click on the OK button to create the new workorder for this client



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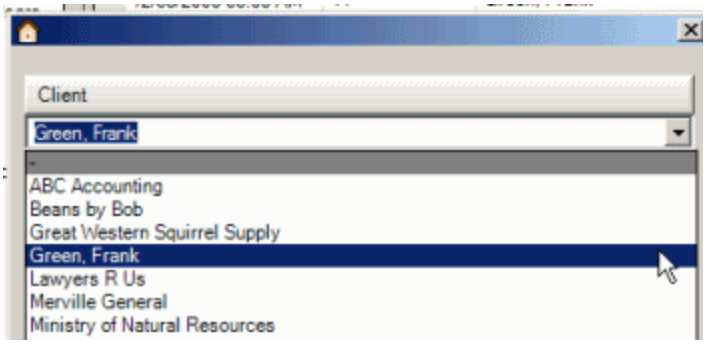
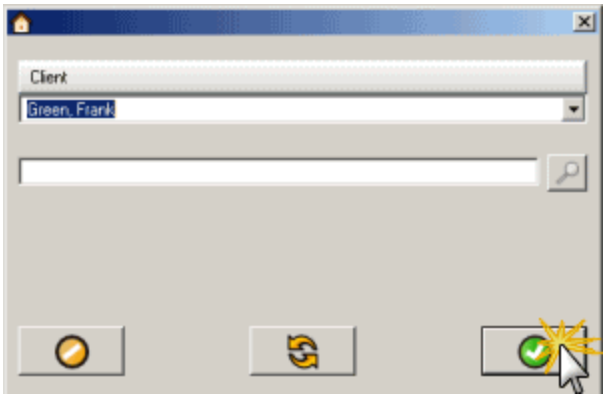
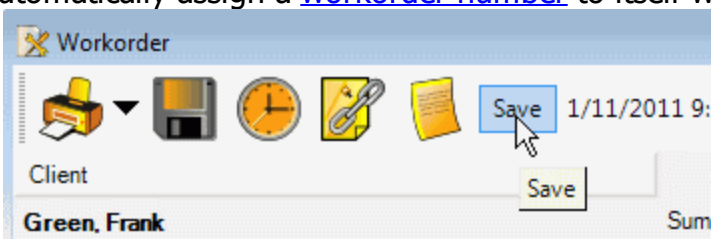
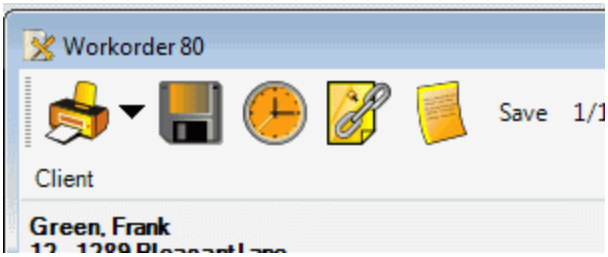




- Click on the Save menu option - note that the service workorder will automatically assign a workorder number to itself when you save.





As we won't cover all the fields and selections in the various areas of the service workorder in this tutorial, it is recommended that you **do** review the Service Workorder section of this Help file for information on suggested use for the fields Workorder Status, Summary, Service Notes, Priority, etc

- Order header area
- Service workorder header area
- Service workorder item

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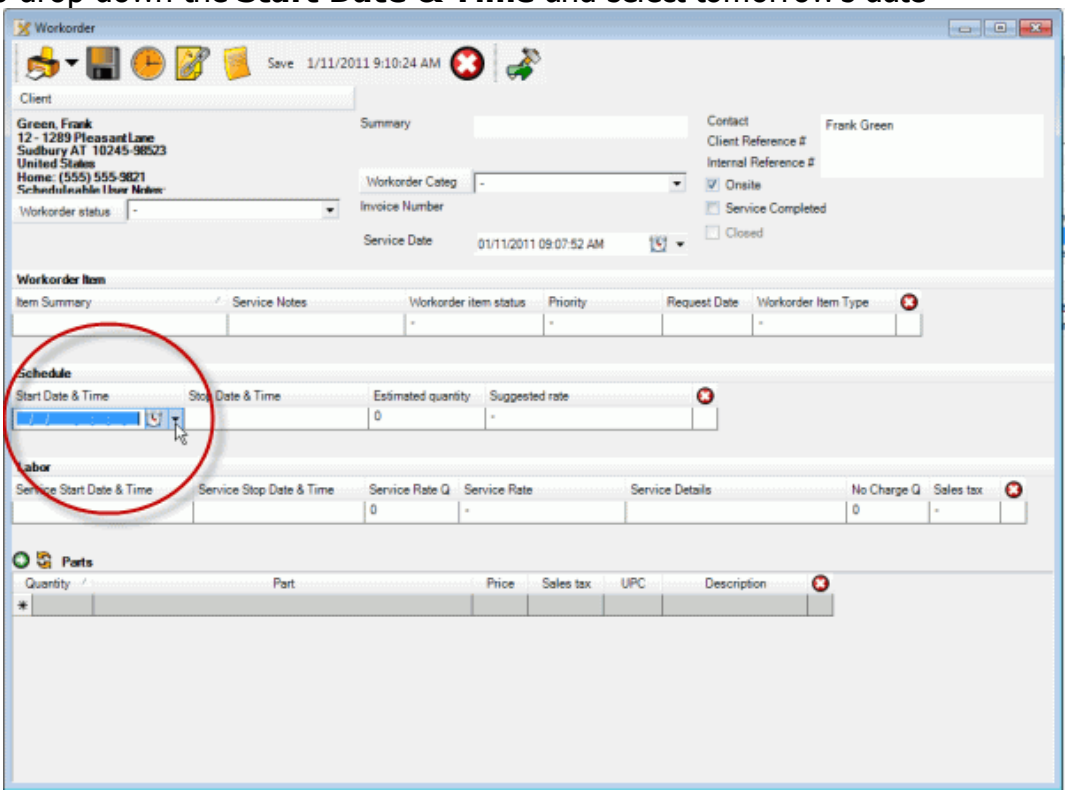
Feel free to enter in details and selections in the fields in the workorder for this tutorial - such as Summary of work to be performed, details in the Service Notes, Workorder Item Status so that it shows that selected statuses color on the Schedule screen etc.

2. Schedule your tech via the workorder

- *Do note that you could instead have created the new workorder (step above) with the scheduled time range (steps below) via the Schedule screen as per the tutorial on creating the new workorder from the Schedule screen*

- In the **Schedule** subsection of the workorder entry screen, use your mouse to drop down the **Start Date & Time** and select tomorrow's date



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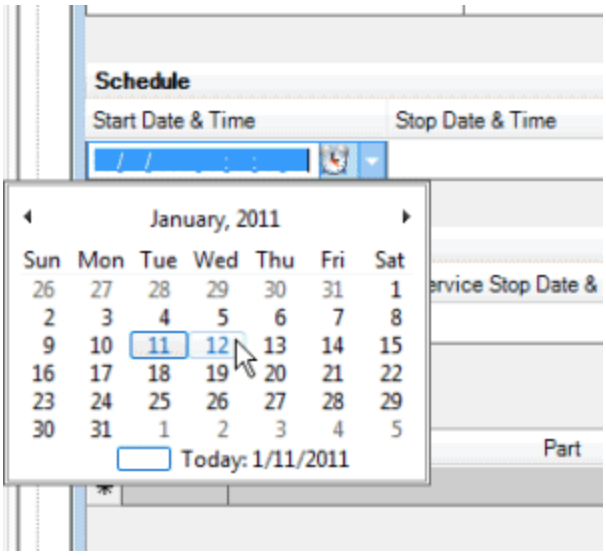
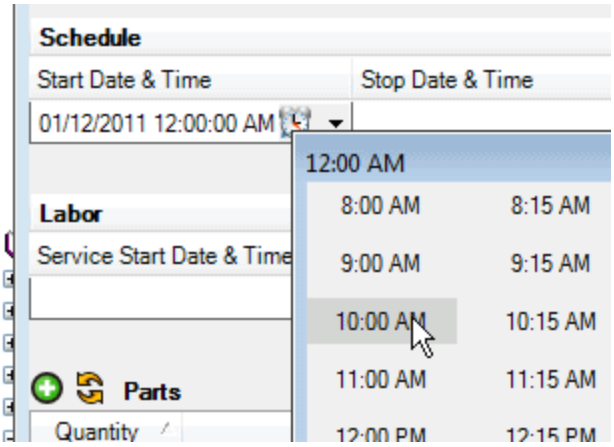


Select the Date. And than click on the Clock image to select the time.

See also the Date and Time Selection section

The time defaults to today's time if select today; or the time you have set in Global Settings for Scheduled Default Time if select a date other than today.

Whether seconds show or not depends on your computer's Regional Settings



and then **tab** to the next field for it to update. Refer to the section on entering time for more examples

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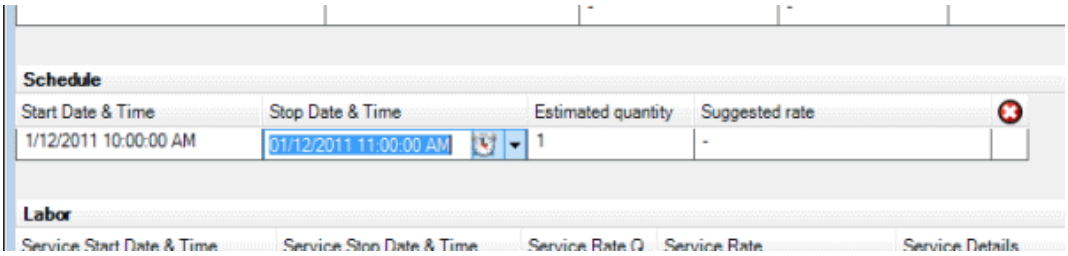


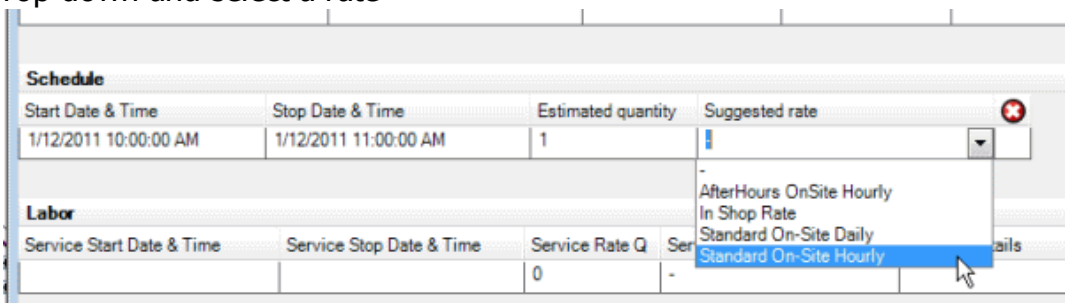
Note how AyaNova will automatically enter in a date and time for you in the **Stop Date & Time** if there was nothing entered there before as a time saving feature.

You can of course edit the time as you wish.

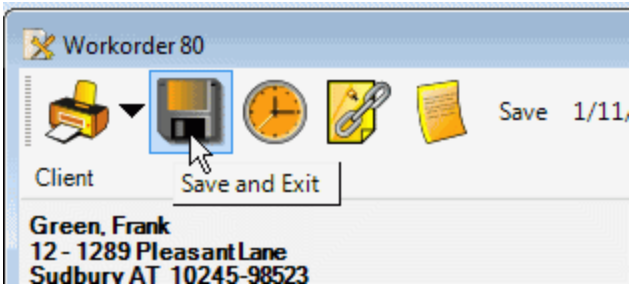
How many minutes it enters the Stop Date & Time are dependant on what you have configured in the Global Settings - **Scheduled Users / Labor Default Minutes** setting

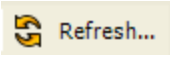
Also note that the **Estimated Qty** will automatically fill in for you based on the difference between the Start Date & Time, and the Stop Date & Time

- Drop down and select a rate



- Save & Exit out of this service workorder



- Now view the Schedule screen selecting that date you had selected in the Schedule section of the workorder, and showing the time range, and click on Refresh 

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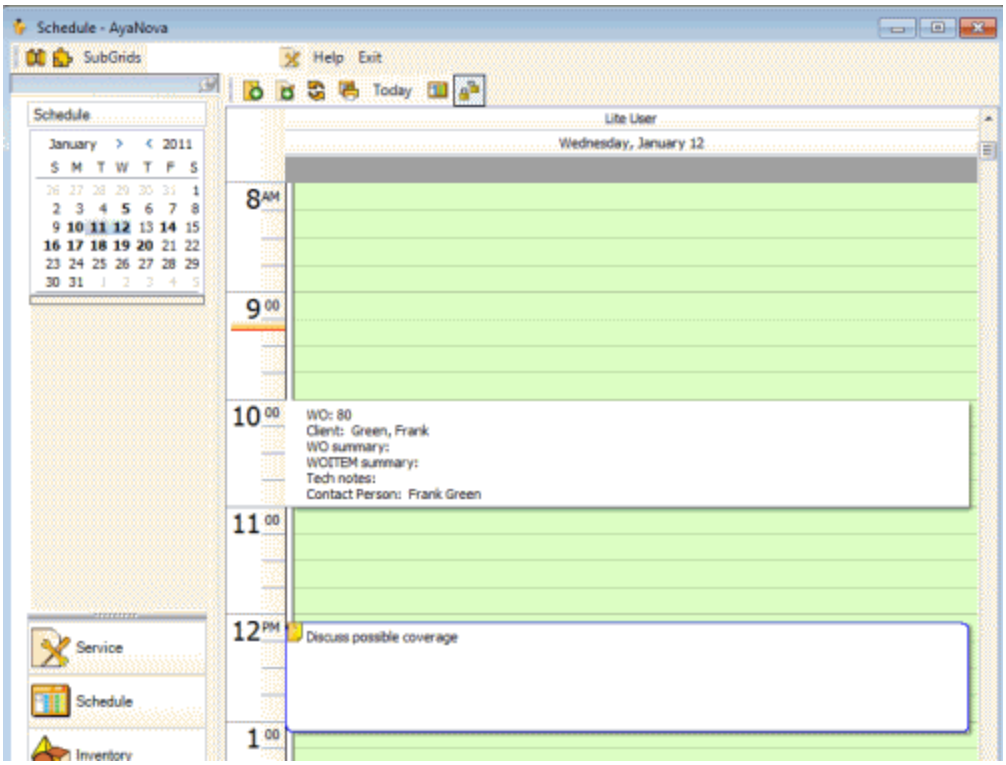
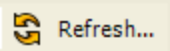


- AyaNova automatically refreshes your grids every 5 minutes, but as we just saved and we want to see this workorder item right away, click the 

Refresh menu option in the Schedule screen menu bar.

- You will now see that your scheduled workorder item you just created is showing for that date and time you set it for.

See also:
Date & Time Selection
Scheduled Users subsection of the order entry screen
Global Settings - Scheduled Users / Labor Default Minutes
Schedule screen
How do I schedule a user for a new workorder item via the Schedule screen?

3. Details of labor service provided entered into the workorder

- We are going to assume for the purposes of this tutorial, that it is now the next day and the service has been performed.

- Open the workorder again by clicking on the workorder number in the Service Workorder grid *(do note that you could also double-click on the scheduled workorder item in the Schedule screen)*

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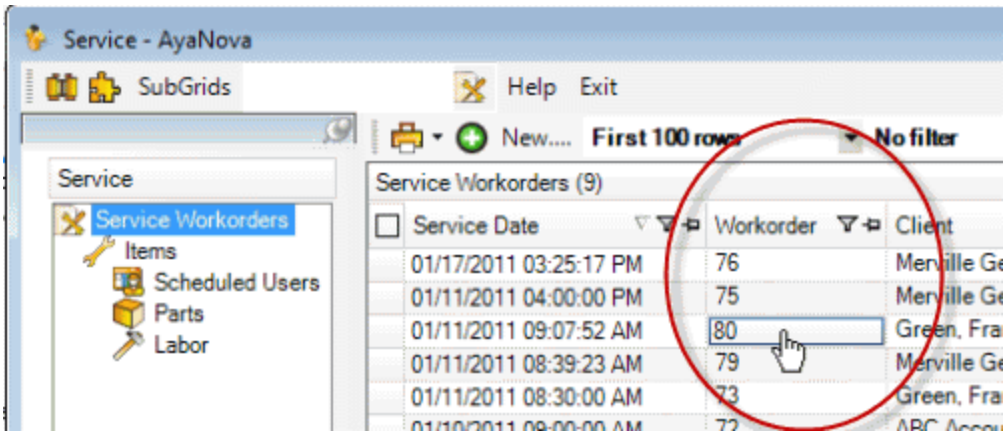
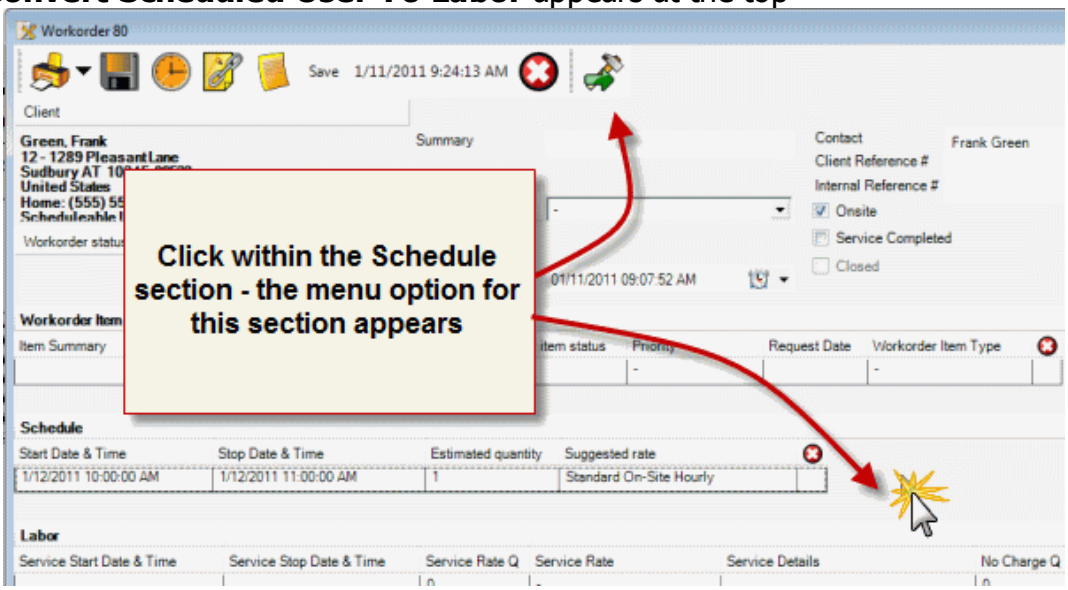
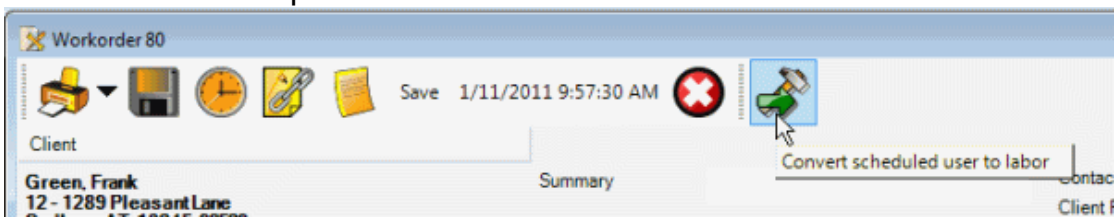


- Use your mouse to click within the Schedule subsection of the workorder entry screen - you will note when you do so that a new menu option **Convert Scheduled User To Labor** appears at the top



- Select this menu option **Convert Scheduled User To Labor**



- When you do so, a new Labor record is automatically created based on those settings you had for the Scheduled User record. This saves you entry time.

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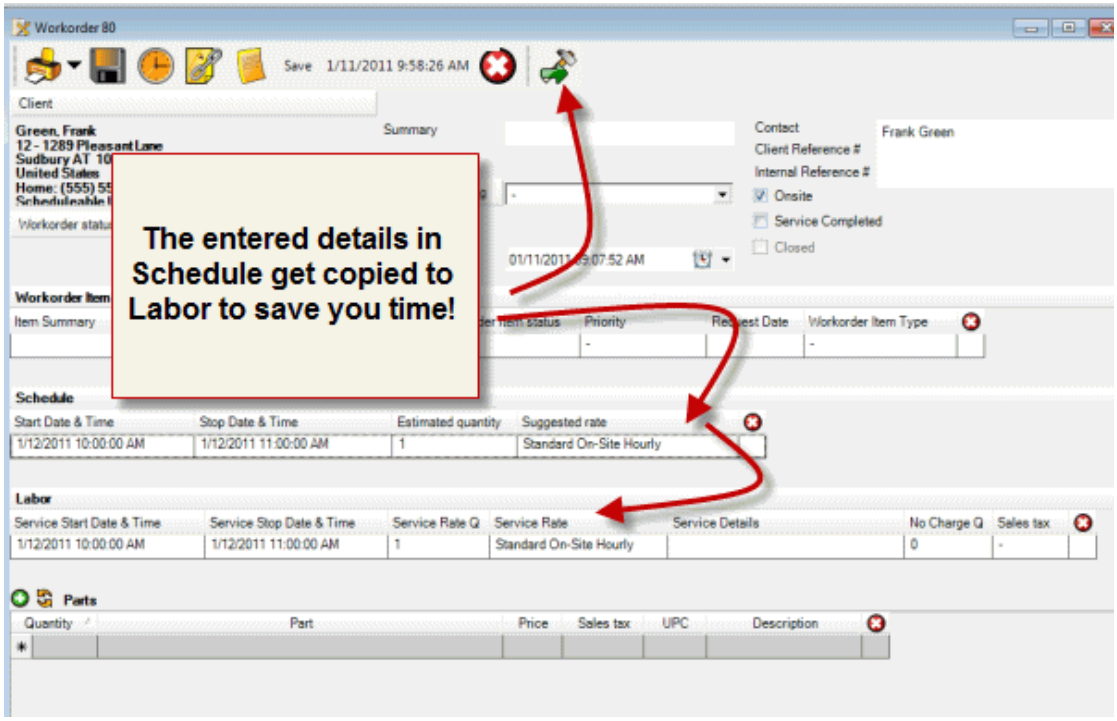

- You can of course just enter in your Labor record manually instead selecting the date and entering the time.

- In the **Service Details** field enter details about the service performed such as the text "*specific details about the service performed so that have a history to refer to, as well as details for the client* " and tab off.

See also:
Convert scheduled items to labor easily
Labor subsection of the order entry screen
Date & Time Selection
Global Settings - Default Service Sales Tax

4. Set workorder to Service Completed

- For the purposes of this tutorial, we are going to assume that is all we want to enter in this workorder
- As we won't cover all the fields and selections in the various areas of the service workorder, it is recommended that you do review the Service Workorder section of this Help file
  - Order header area
  - Service workorder header area
  - Service workorder items
  - Scheduled users
  - Parts

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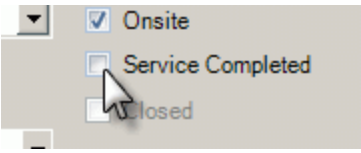
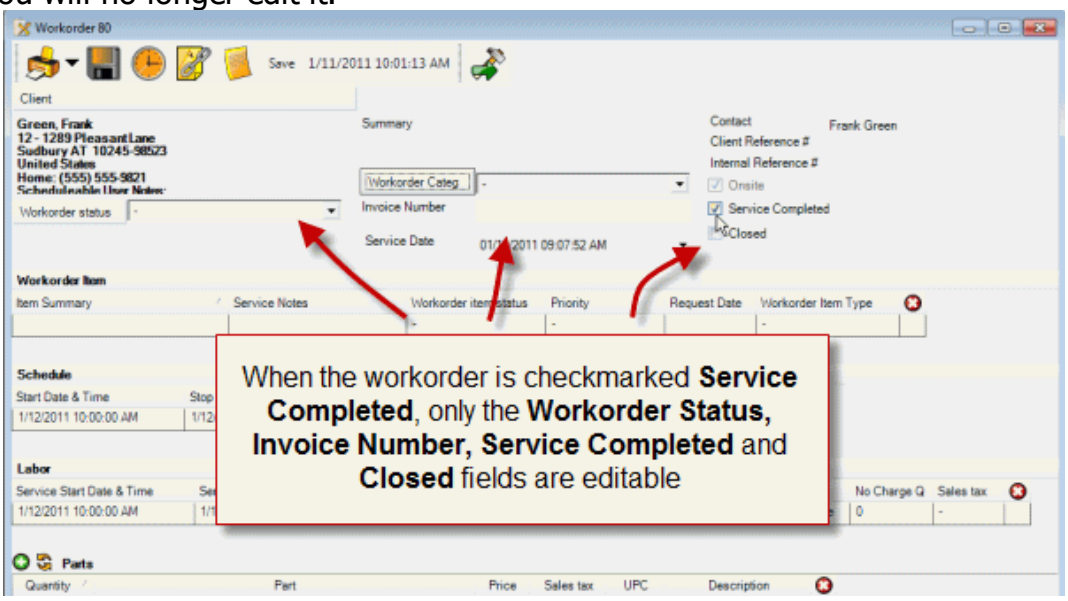
- Labor

- Check-mark the Service Completed check box



- Once set to Service Completed, then the **Invoice:** field is now editable. All other fields other than the **Workorder Status** and **Closed** are no longer editable as it is assumed at this point if you have completed the workorder, you will no longer edit it.



Do note that you can uncheck Service Completed so that you can edit other fields.

5. Invoice the billable items to your customer

- You will note that the only fields that are editable are **Invoice Number, Workorder Status, Service is Completed, and Closed.**

  When a workorder is check-marked **Service Completed**, this sets the workorder so that it can not be accidentally edited - because you have said it is completed, and therefore should not be edited or changed. If you have to edit a field that is not one of those four stated above, you need to un-check-mark Service Completed

- At this point, you want to invoice your customer so that you get paid for the work performed.

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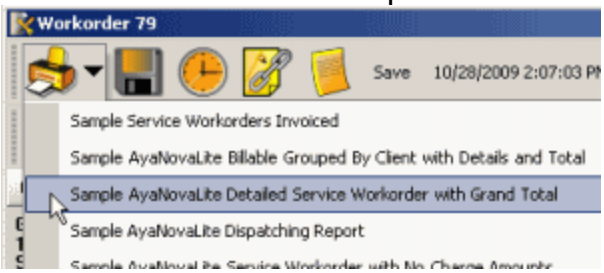
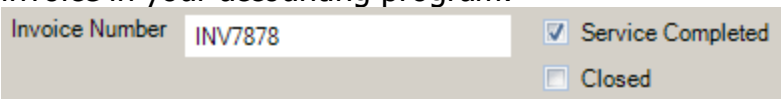
If using the optional add-on QBI QuickBooks accounting software interface:
Use QBI to invoice out the workorders billable items, the QuickBooks invoice number is automatically entered in the Invoice Number field, and the workorder is automatically check-marked Closed (if selected to do so in QBI Preferences) and the Workorder Status set to that in your Global Settings for Workorder Closed Status. Refer to an overview of QBI features at http://www.ayanova.com/qbi.htm

If using the optional add-on PTI Peachtree accounting software interface:
Use PTI to invoice out the workorders billable items, the Peachtree invoice number is automatically entered in the Invoice Number field, and the workorder is automatically Closed (if selected to do so in PTI Preferences) and the Workorder Status set to that in your Global Settings for Workorder Closed Status. Refer to an overview of PTI features at http://www.ayanova.com/pti.htm

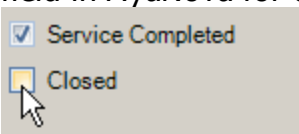
if not using QBI or PTI but another accounting program:
Print out for example the **Sample Detailed Completed Service Workorder with Grand Total report** for this workorder so that you can refer to the print out when invoicing the billable items. And include the AyaNova print out with your invoice you send to the customer so that they can see details of the work performed.



Then manually enter the invoice number from your accounting program into the **Invoice Number** field so that you can cross reference to the invoice in your accounting program.



When the customer pays the invoice, at that time check-mark the Closed field in AyaNova for this workorder.



If not using QBI, PTI or any other accounting program:
Print out for example the Sample Detailed Completed Service Workorder with Grand Total and send that as is to the customer for payment.

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Change the Workorder Status for example to a Workorder Status called "Invoiced - waiting on payment" so that you can easily filter to see what workorders are outstanding to be paid.

And when payment is received, perhaps change the Workorder Status for example to a status called "Invoiced & Payment Received" and check-mark the Closed field to close the workorder.

- It is highly recommended that you review this Online Help entire section on Service Workorders for complete overview , suggestions on use, tips on use and more.

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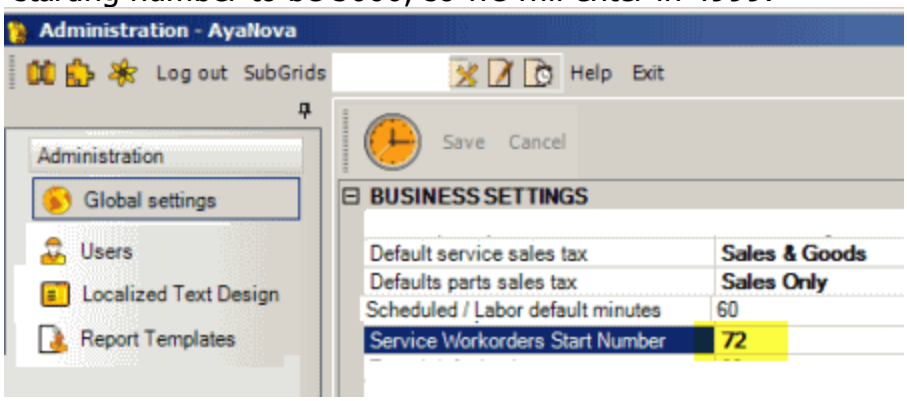
5.4 Change the starting workorder number?

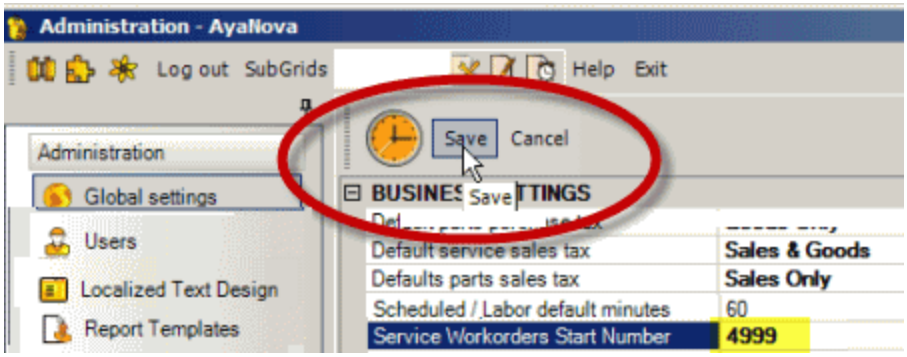
In this tutorial example, we will go through changing the starting workorder number for your database. For example, you might want your first workorder number to start at 5000

- It is recommended that you review this Online Help section on Workorder Numbers
- It is recommended that you review this Online Help section on Global Settings

1. Edit the Global Settings field Service Workorders Start Number to a number just before your starting number you want. For example, in this tutorial we want our starting number to be 5000, so we will enter in 4999.



2. Click on the Save menu option for Global Settings.



3. Now immediately go to the Service Workorders grid in the Service navigation pane and create a new workorder.

4. Save the workorder - you will note that this workorder number is 4999.

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5. You can now delete this workorder. The next workorder saved will be number 5000.

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5.5 Filter a grid and print a report for the records that show

In this example, we want to print a report showing workorders that have not yet been invoiced for the previous month.

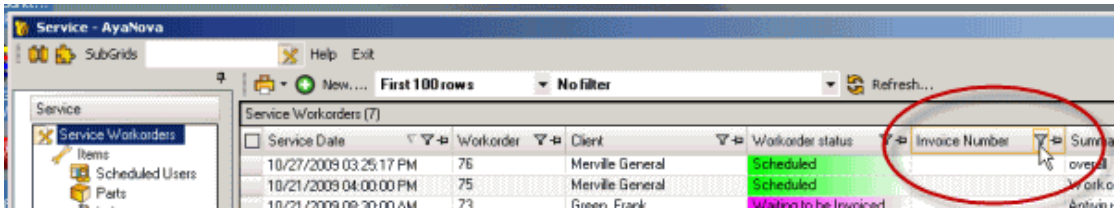
Do also review the following Online Help sections:

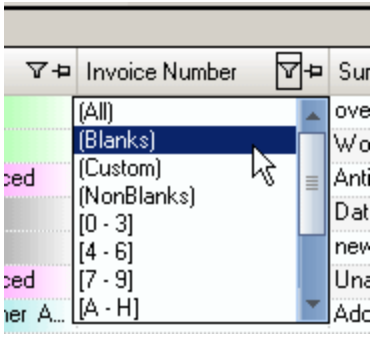
Moving and sorting columns in a grid
Pinning a column
Setting what columns display in a grid
Filtering a grid

1. In the Service navigation pane select to view the Service Workorders grid

2. Filter this grid to display only the records that do not have text in the Invoice field (signifying to us in this tutorial that the workorder has been invoiced).

   a. Select the filter icon on the column **Invoice Number** to drop down the filter settings and select Blanks - only records that do not have any invoice number in them.





3. Now filter the **Service Completed** column to display only records that have been check-marked that service is complete.

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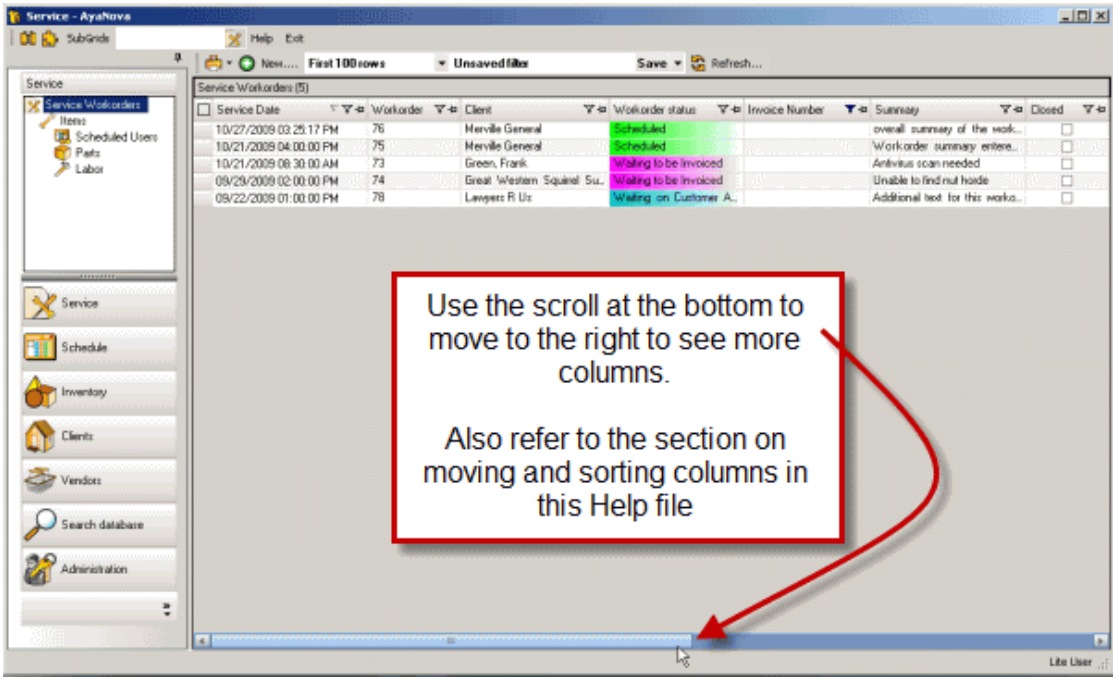

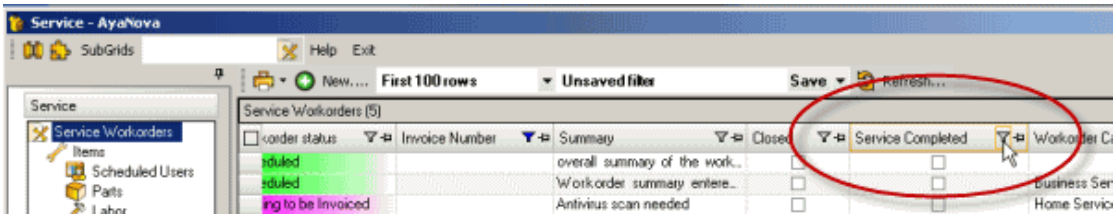

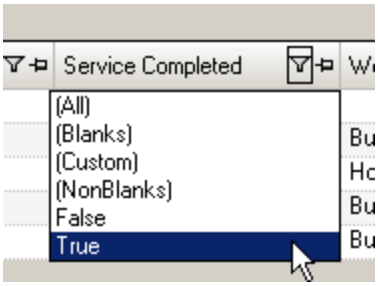

4. The grid will now display all workorders that have been checkmarked Service Completed and do not have any text in the Invoice Number field.

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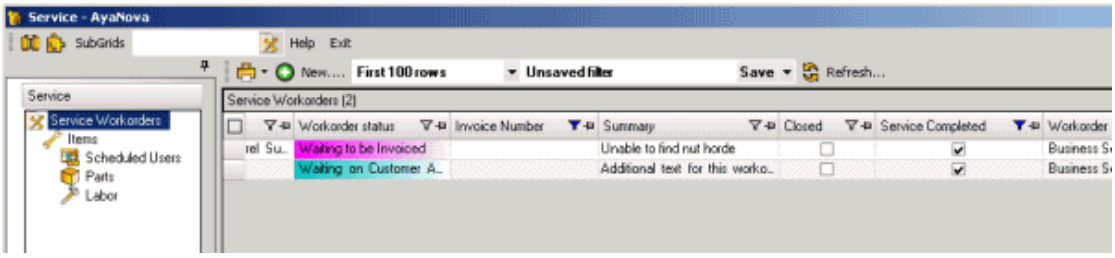
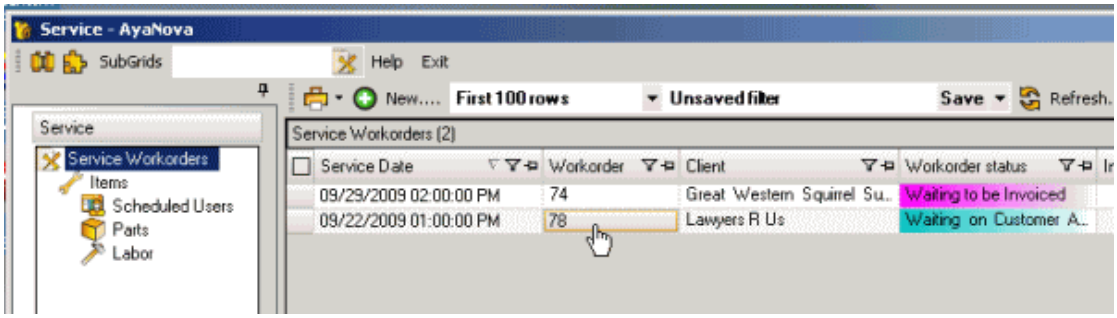
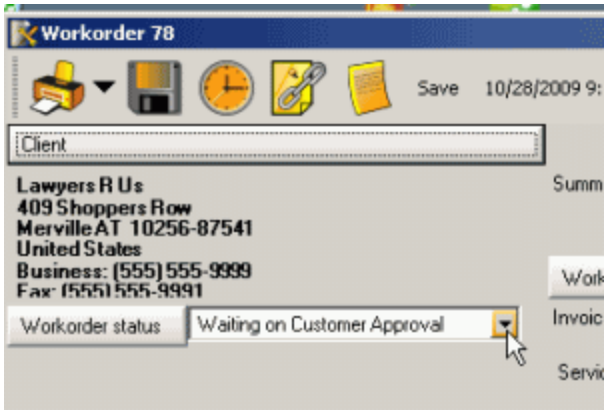


5. You might notice depending on if using the sample data, that the workorder status of one of the workorders actually is Waiting on Customer Approval instead of Waiting to be Invoiced. This tutorial is than showing you by filtering on multiple columns, you can find all workorders that meet what you are looking for, in case you forgot to change a selection.

   a. Open the workorder that has the workorder status Waiting on Customer Approval and change the status to Waiting to be invoiced, save and exit back to the grid when done.





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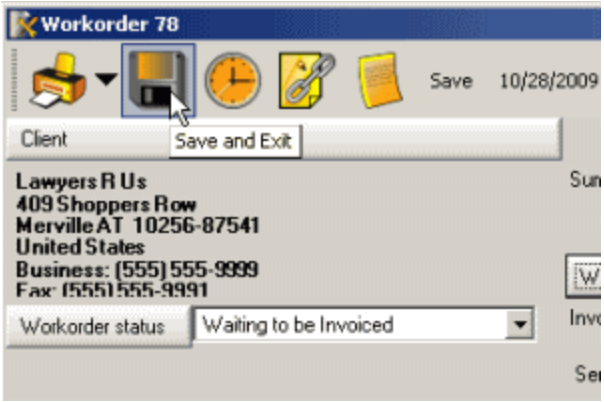
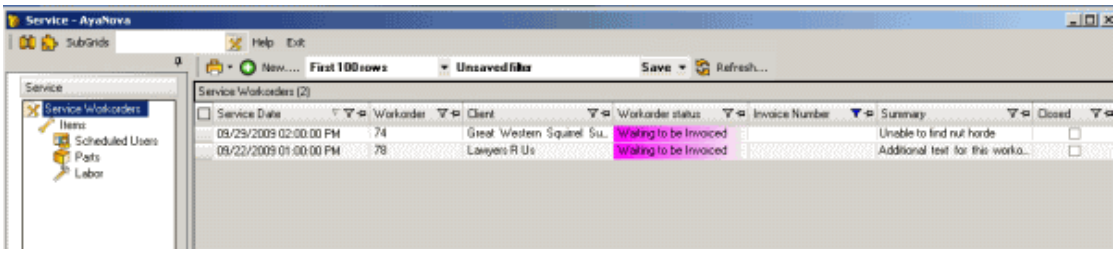


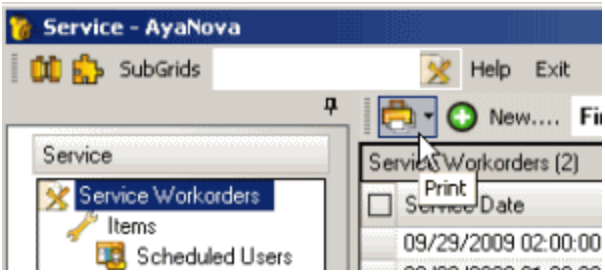
6. Now you can see all workorders that need to be invoiced.



7. You could save this filter for easy selection next time, or continue to edit or revert back to No Filter – up to you.

8. Now you can print Detailed Service Workorder with Grand Total reports for all shown workorders that need to be invoiced.

   a. Select the Print menu option and the report Sample AyaNovaLite Detailed Service Workorder with Grand Total



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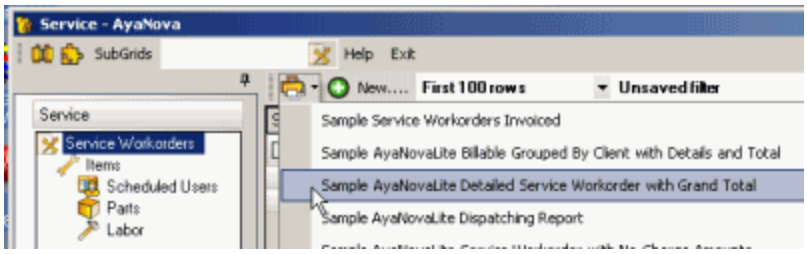
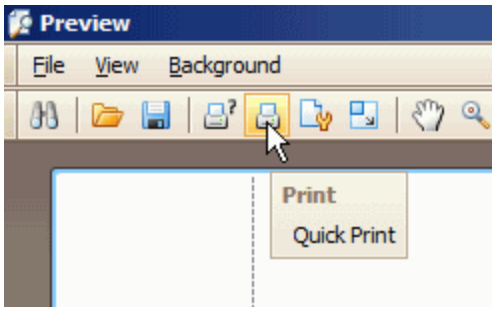


9. The Print Preview will display so that you can look it over before printing.



10. As per the previous tutorial that provided a brief overview of a workorder, you might now invoice these workorders using QBI through to QuickBooks; or PTI through to Peachtree; or manually invoice out in another accounting program and enter in the invoice number in the workorder; or utilize the Workorder Status field to identify report sent to client for payment and awaiting payment; etc.

See also:
Using the Filter Drop List
Filtering a grid

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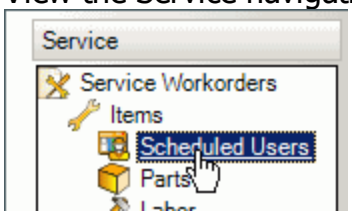
5.6 Create a custom filter

In some cases, you may want to filter what displays on the grid based on more than one criteria to the same column.

An example of why you might use this feature is you may want to see all records between two **specific** dates of the Scheduled Users Start Date & Time column, so that you can print out a report for records during this specific time frame. (note that there are already built in convenience filters for preset time spans such as "this month")

Below is an walk through of performing a custom filter on the **Start Date & Time** column in the Scheduled Users grid, so that we display only records within a specific date range.

1) View the Service navigation bar and select to view the Scheduled Users grid



2) Move the **Start Date & Time** column to the position where the grid will sort by it if not already there - this is just so you can easily see the column

   a) See the Moving and sorting columns in a grid and the Pinning a column sections of this Help file for examples

   b) You can use your mouse, click and drag the Start Date & Time column to the far left, or select the of the Start Date & Time column to pin it which automatically moves it to the left..

   c) Note how the Start Date & Time column now has a to indicate this is the column to be sorted by as it is the first column on the grid

3) We will create a custom filter on the Start Date & Time to display only scheduled user items for a specific date range.

   a) Select the filter image on the Start Date & Time column to drop down the list of filter options and select *(Custom)*

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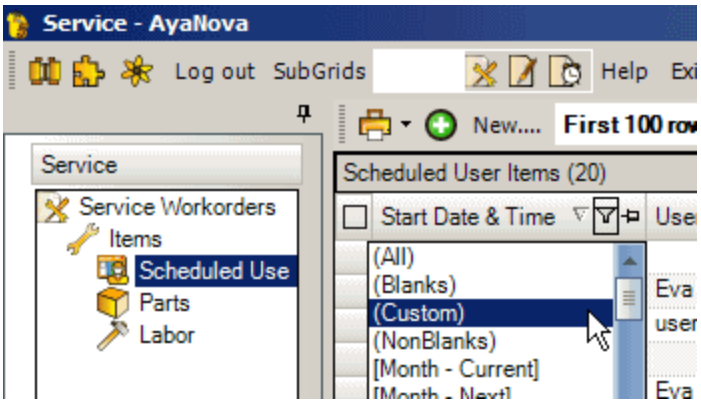
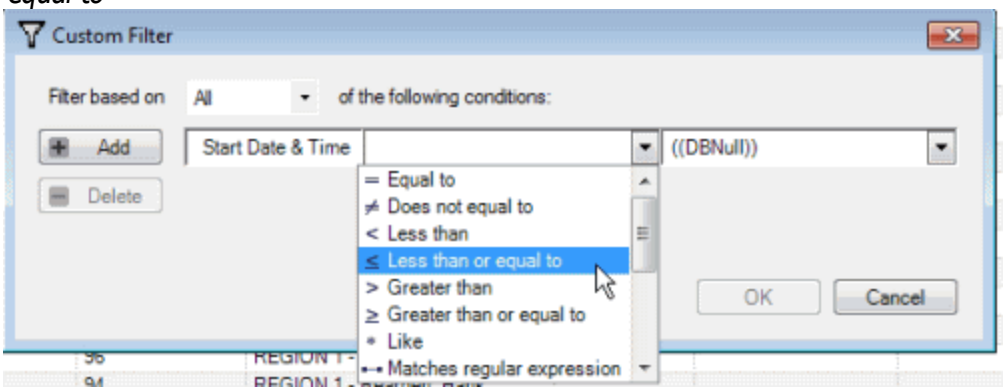
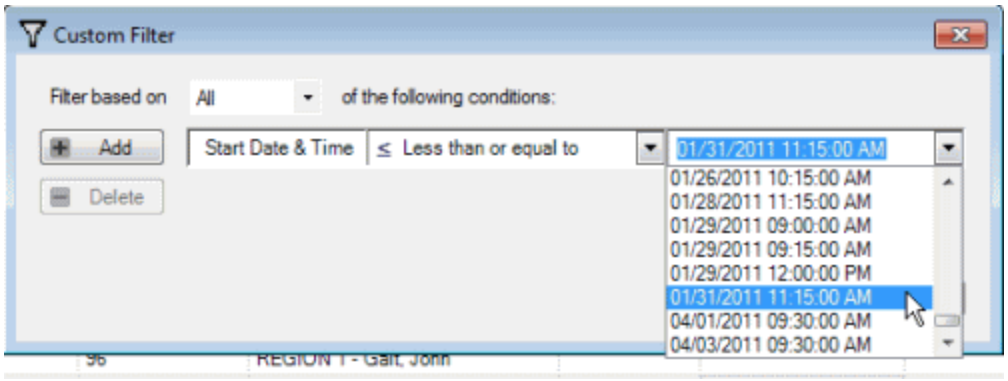


b) Using the (Custom) filter we will create two queries in the custom filter – one to bring back all records less than an existing Start Date & Time, and one to bring back all records greater than an existing Start Date & Time - so that only the records with the dates in-between display

c) For this Start Date & Time column, select the condition of *< Less than or equal to*



d) And select an actual Start Date & Time that is the farthest date you want the range to be (i.e. the latest date)



e) Select **Add** a condition which will add a second query

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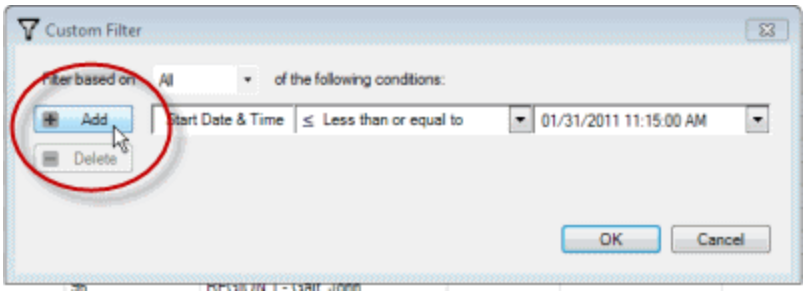
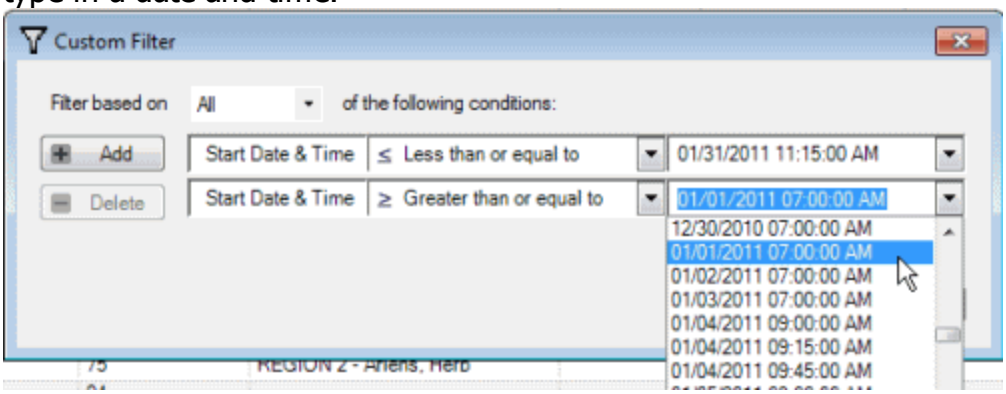


f) In the second query, select **Operator** of *> Greater than or equal to* and drop down the **Operand** and select an actual Start Date & Time of a scheduled user item that is the oldest date you want the range to be

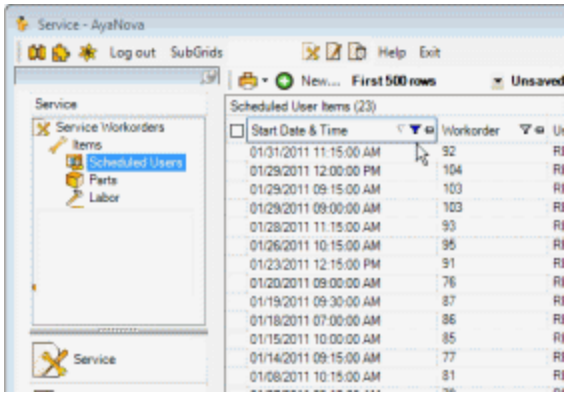
g) Remember, you have to **select an actual** Start Date & Time – do **not** type in a date and time.



h) Select OK

4) Note how the Start Date & Time column filter in this grid is now colored which indicates this column is now filtered

5) And note how only records within that date range you selected are now showing in this grid.



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6) You can also have additional filters on other columns at the same time in this grid.

See also:
Using the Filter Drop List
Filtering a grid

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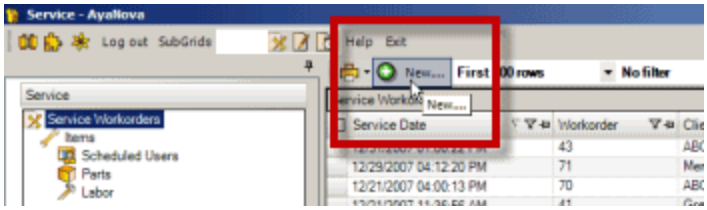
5.7 Create new workorder with client not yet entered

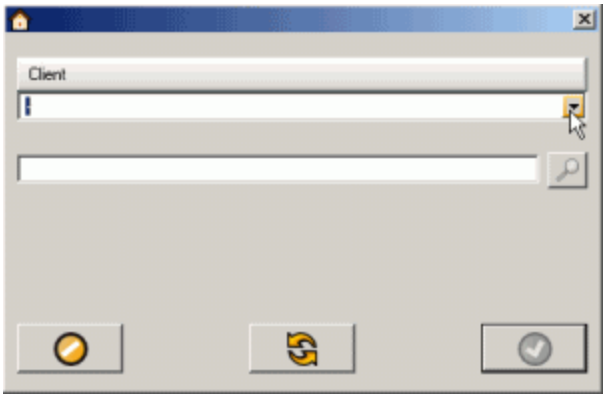
In this tutorial example, we will go over the initial steps of creating a new workorder, and what to do if the client is not yet entered into AyaNova. As you can enter a lot of data "on the fly" with AyaNova, this is easily accomplished.

- Do note that this is an overview only, and does not cover every time saving and useful feature of the workorder entry screen. Do review this Online Help entire section on Service Workorders for complete overview and suggestions on use.

1. A client calls and would like work performed. You are not sure if they are an existing client or not.
2. There are a number of ways you can create a new workorder for a client
3. In this example, we will select the grid menu option New...

from the Service Workorder grid which opens the client and template section window





4. Start typing in the name of the client in the Client field - for example, if the client's company name is Millie's , type the letter "m" - note how the list jumps to displaying all clients that company name begins with the letter "m"

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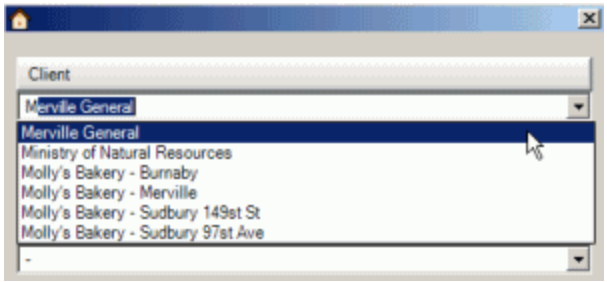
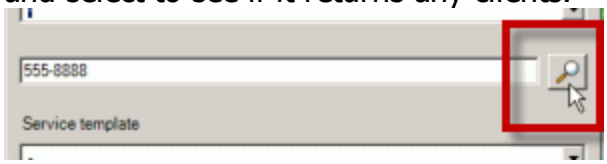


5. In our example, Millie's is not yet a client entered in AyaNova

6. So, we click on the Refresh button to put the client selection screen back to nothing selected

7. Just in case the company name was entered as something else, we will use the Client Finder feature to enter in some text that would have been entered if the company was entered - for example, the company phone number.

   In the Client Finder field, enter in for example the phone number 555-8888 and select to see if it returns any clients.



   If you drop down the list of clients, you will see that no clients have this phone number listed anywhere.

   Click on the Refresh button to put the client selection screen back to nothing selected

8. As the client is not yet entered into AyaNova, you can quickly enter in at minimum its company name so that you can create a workorder for it.

   Click on the Client jump button which will open a new empty client entry screen

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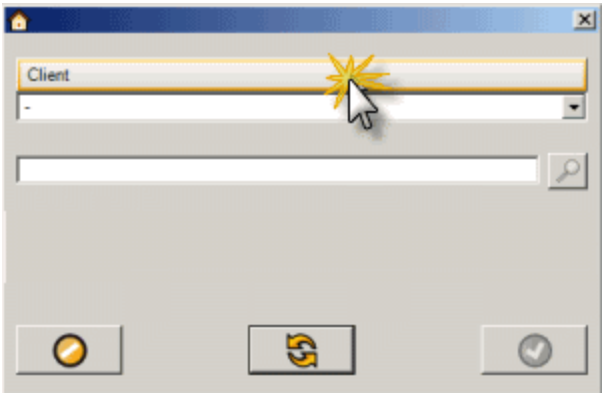
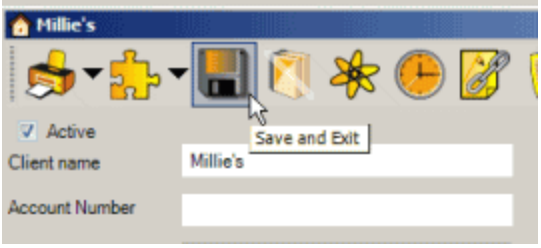
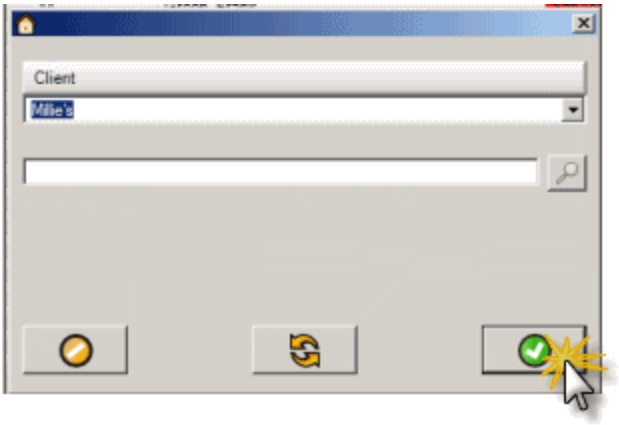


You can enter as many details of the client at this point as you want - enter just the client name and Save & Exit, or go ahead and get all of the information such as address etc. You can always come back later to complete entry as the name is the only required field.



9. The client we just created is already pre-selected for us when we Save & Exited out of that client entry screen so click on the OK button to create the workorder for this client



10. Now the new workorder opens, and we can enter details as needed. Refer to the Service Workorder section of this Help file for details

11. Also note that you can add client information such as address, phone number, etc via the Client jump button in the workorder - you do not have to close the workorder to do so. It is suggested that you save the workorder in between as saving your work regularly is always recommended.

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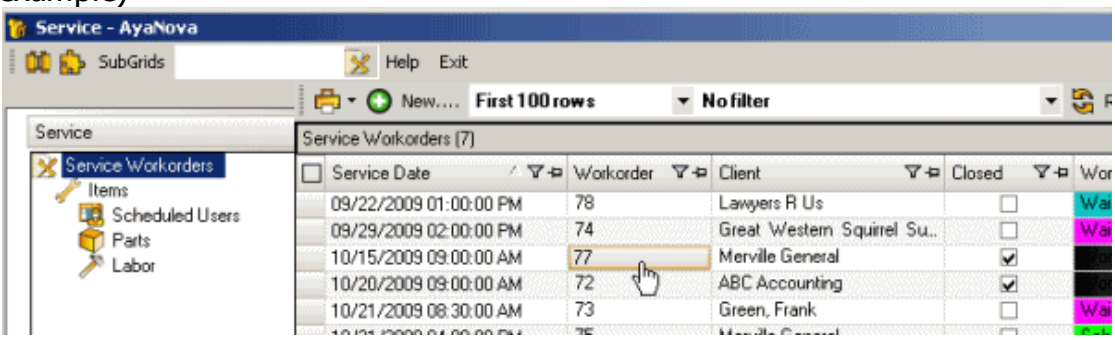
5.8 Create and view Follow Up in a workorder

A Follow Up is actually a Schedule Marker with the additional feature of providing a jump button to open the specific workorder (or client) that the Follow Up is referring to.

- Just like a Schedule Marker, the Follow Up will display on the graphical Schedule screen as a reminder to you.
- A service workorder (or client) can have as many Follow Up's as desired, you are not limited to just one.
- A Follow Up can be created at any time during the life of a service workorder - it can even be created when the service workorder is check-marked Closed.
- An example of Follow Up use, is that you want your schedulable user to be reminded to contact a client at a certain date after work has been performed to confirm all work is still satisfactory and to see if there is additional service that may be needed to be performed. This is a way to confirm that your customers are happy attracting more business.

In this tutorial we will go over creating a Follow Up for a specific workorder

1. Open an existing Closed sample workorder (do note that you can create a Follow Up for an open workorder as well as for a Closed workorder - this is just an example)



See also:

Filtering a grid
Moving and sorting columns in a grid
Pinning a column

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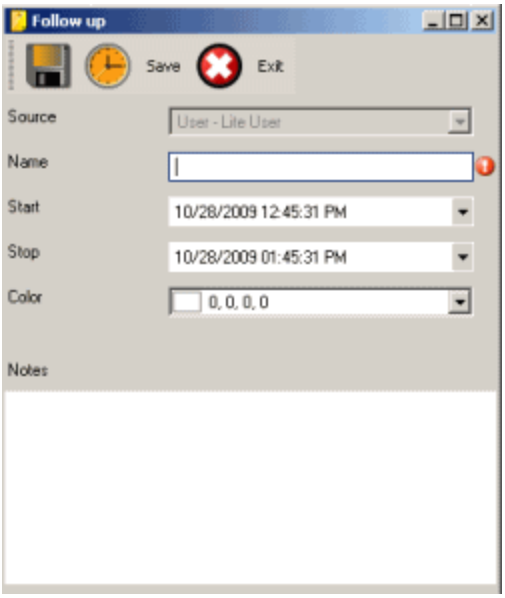
2. Select the workorder menu option **Follow up** which will open up the Follow Up selection window for this workorder.

If there are no existing Follow Up's for this workorder, nothing will show in the selection by default. If there was one or more Follow Up's for this workorder, the first Follow Up by alphabetical order based on the name will display by default.

3. Click on the to create a new Follow Up for this workorder

5. The Follow Up creation window displays - note looks just the same as a Schedule Marker



6. Enter in the **Name** field a descriptive name for what this Follow Up is about

7. The **Start** defaults to today's date and time, and the **Stop** to an hour later.

- Edit so that the Start date is a two weeks from now

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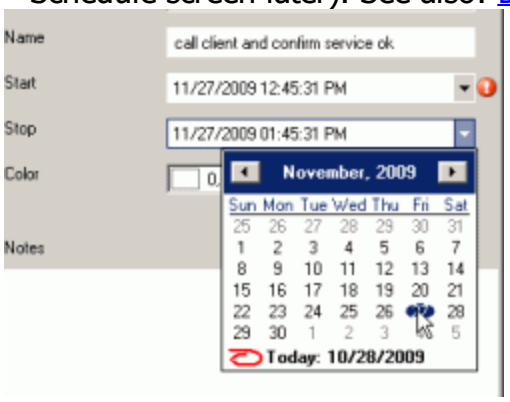
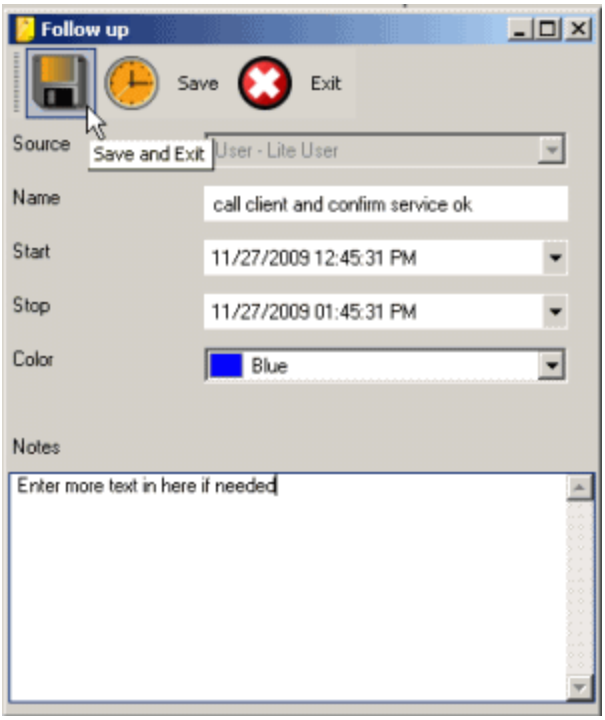
- Edit so that the Stop is also two weeks from now
- (make a note to yourself the date you enter so that we can review it on the Schedule screen later). See also: Date & Time Selection



8. Select a **Color** if desired which borders the Follow Up when viewing on the Schedule screen

9. Enter in additional **Notes** as needed



10. Select Save & Exit to return to the Follow Up selection window

11. If you want to view the Follow Up from this window, select it from the list of Follow Ups for this workorder and click on the to open it.

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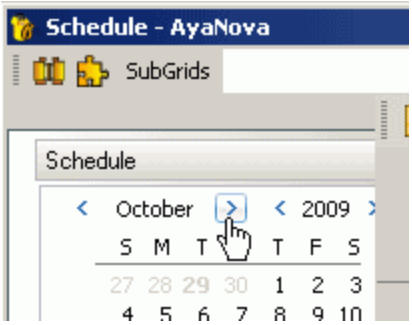
12. To exit out of the selection window back to the workorder, select or the X in the upper right-hand corner

13. Now lets exit out of this workorder, and view the Follow Up on the Schedule screen

14. On the Schedule screen, view the date of the Follow Up that you made for the schedulable user you selected using the Date Navigator on the Schedule screen to be able to select the date.



See the Follow Up - it looks just like a Schedule Marker as that is what it is, just available for creation from a workorder as well as providing a jump button to open the workorder.

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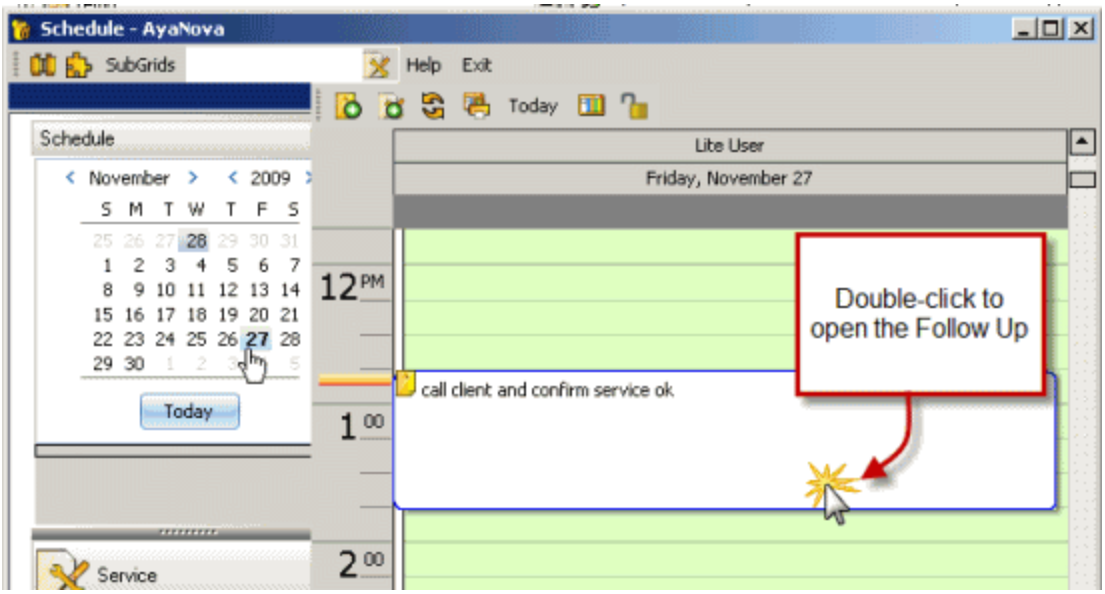
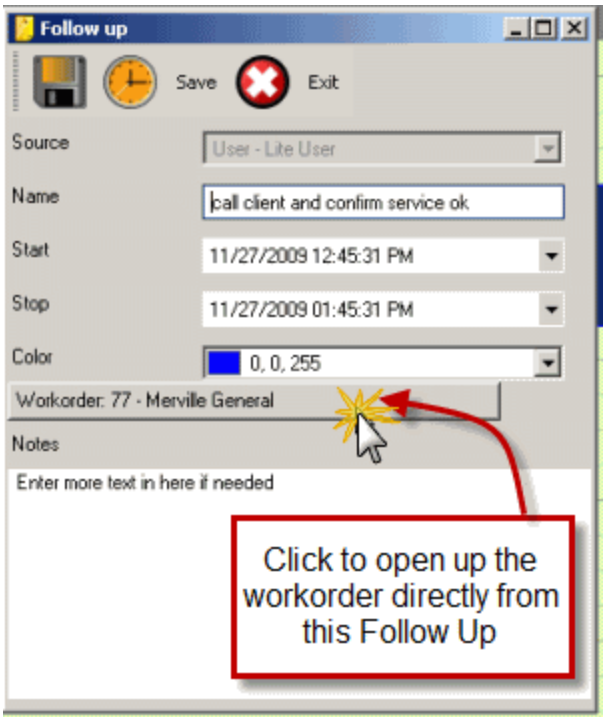


15. Double-click on it to open

16. Note how the Follow Up as a jump button that if you click on will open the workorder it was created from.



NOTE: Notification subscriptions via email or pager when a Follow Up or Schedule Marker are imminent is not a feature of AyaNovaLite. Refer to the full AyaNova for such a feature.

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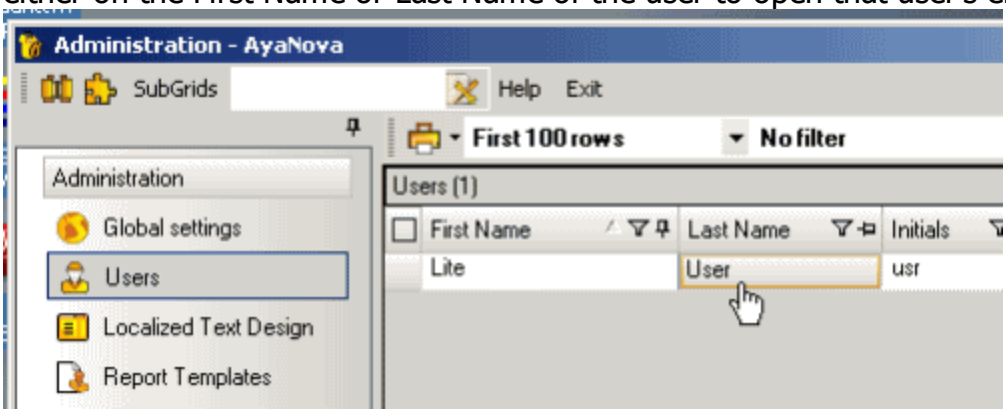
5.9 Edit name of the schedulable user

Tutorial on how to edit the name of the schedulable user

1. Run AyaNova Lite

2. Select the Administration navigation pane, and view the Users grid, and select either on the First Name or Last Name of the user to open that user's entry screen



4. Enter your first name

5. Enter your last name

7. Enter your initials

8. When viewing the Schedule screen, what color you set for Schedule Back Color for this schedulable user's workorder items will have this back color for easy viewing. See the Schedule section for more details about the Schedule screen.

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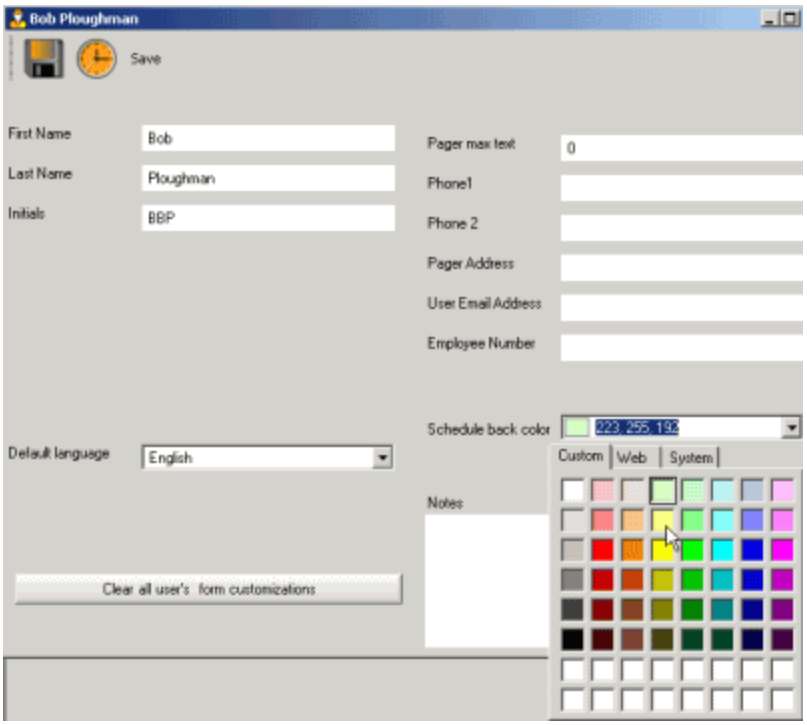


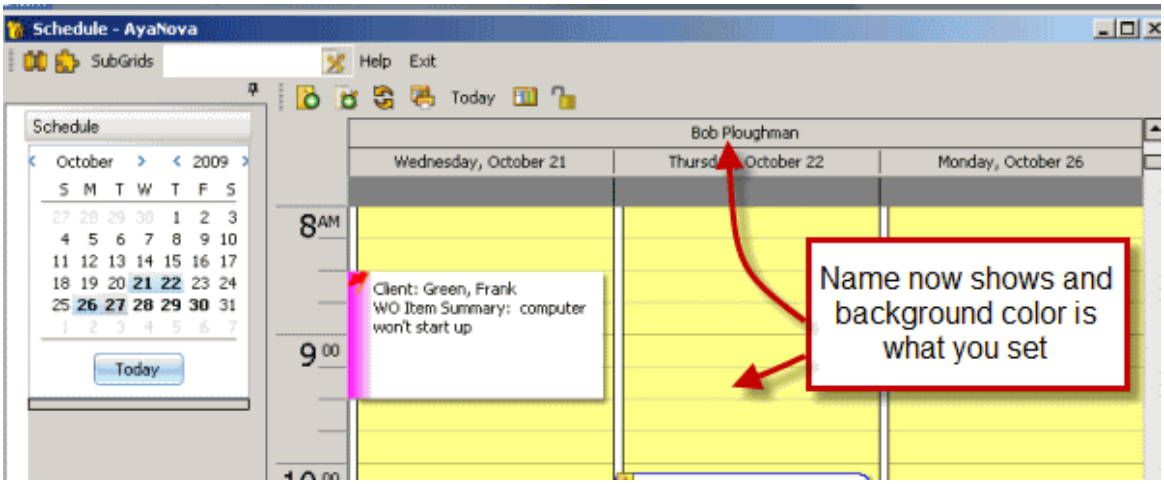
9. Click on the Save & Exit menu option

10. View the Schedule screen

11. Click on the Refresh menu option

at the top of the Schedule screen calendar

This user's name will now show in the Schedule screen.



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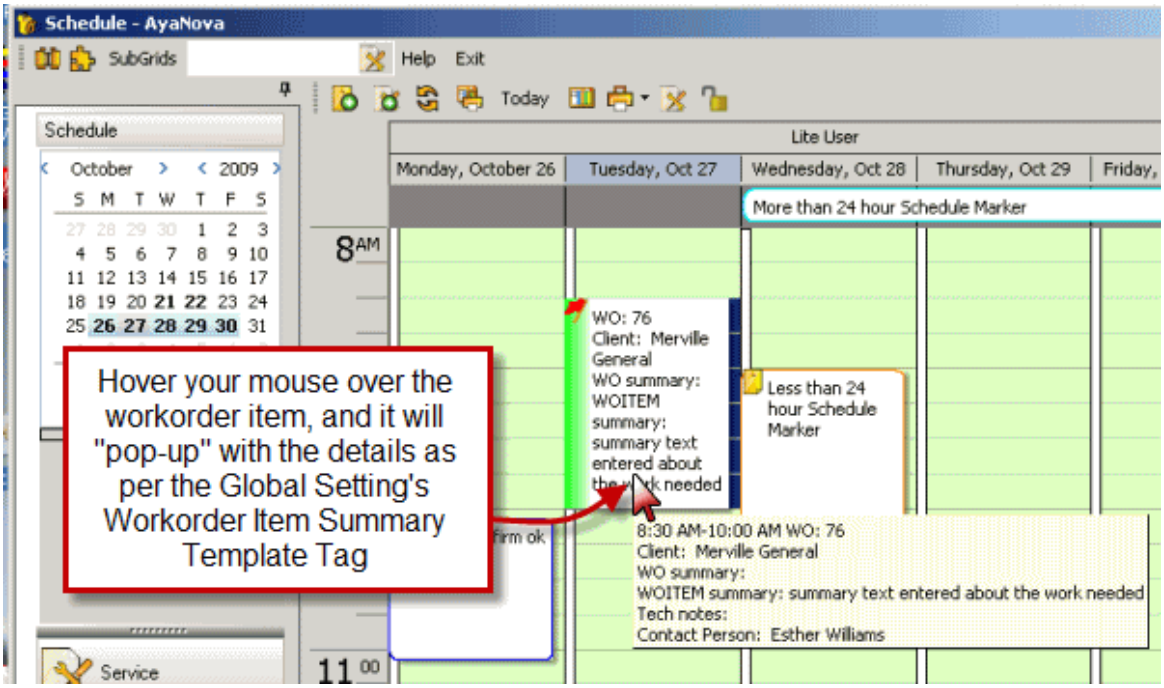
5.10 Edit what pops up on Schedule screen for workorder item

A workorder summary is displayed when you mouse over a workorder item in the Schedule screen and will display within the schedule as space permits



- You can edit what displays in this area via the Global Settings under the Administration navigation pane Workorder Item Summary Template tags section.

- In the above screenshot, the Workorder Item Summary popup for the Schedule screen presently displays:

  start and stop time workorder number
  WO: workorder number
  Client: client's name
  WO summary: workorder summary
  WOITEM summary: workorder item summary
  Tech notes: service notes
  Contact Person: from Contact field in workorder

  - NOTE: the start and stop time displays by default where appropriate.

An example of how to edit what pops up:

1. Hover your mouse over a scheduled workorder item in the Schedule screen so that you can see what is presently displaying.

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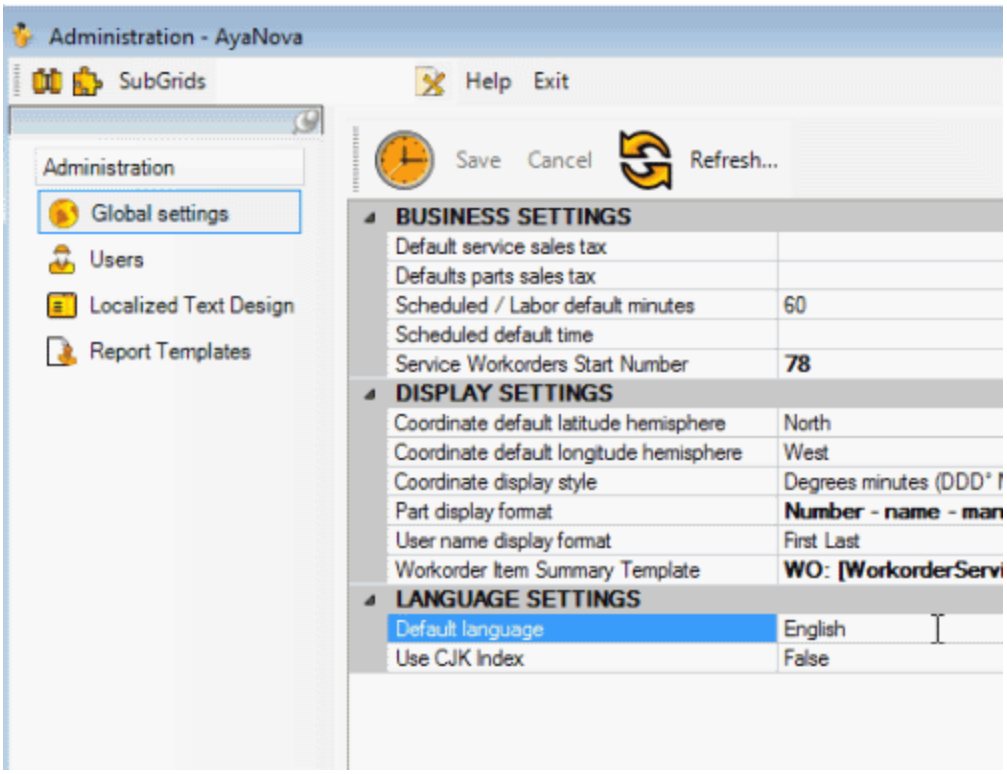
2. Now let's edit the template for the workorder item summary so it displays differently.

- Move to the Administration pane by clicking on the Administration icon on the navigation pane, and select **Global Settings**



3. Within the Global Settings screen on the right, select the **Workorder Item Summary Template Editor** drop down selection button so that the template editor drops down.

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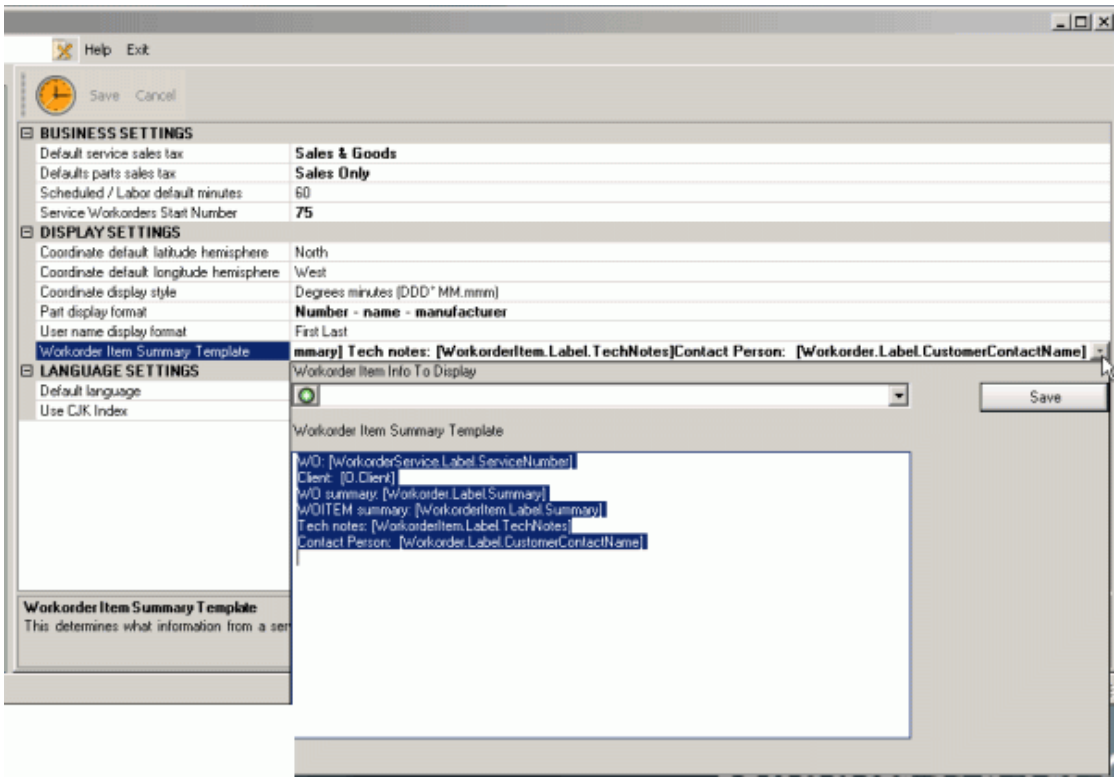
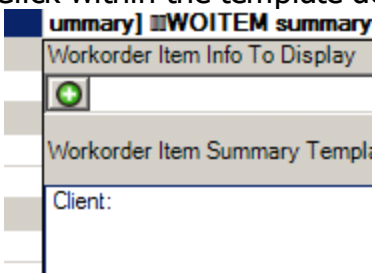


5. Highlight the existing text in the Workorder Item Summary Template design field and delete so you can start from scratch.

6. Any text will display as entered. Any tags selected from the "workorder item info to display" list will be substituted automatically on display.

7. Click within the template design field and type **Client:** and a space



8. Select the Workorder Item Info To Display drop down selection and select the tag **[O.Client] - Client** (any info in the [ ] brackets is internal for AyaNova to understand what it is you are selecting)

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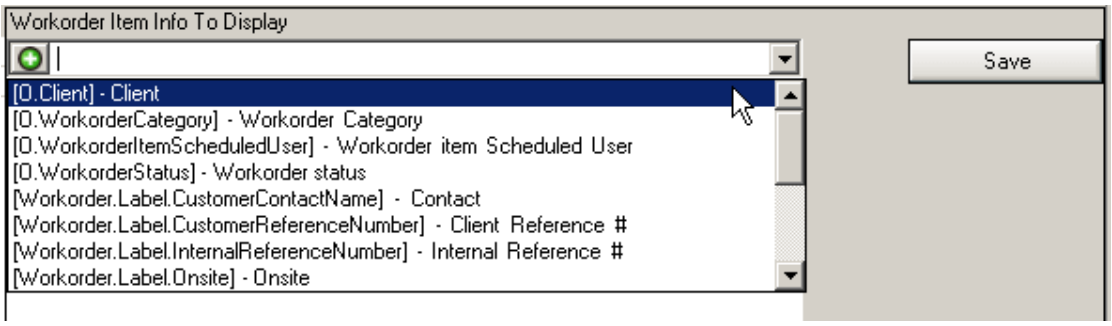
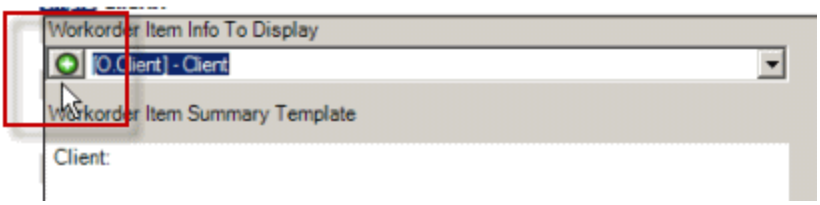
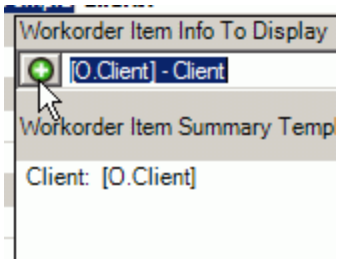
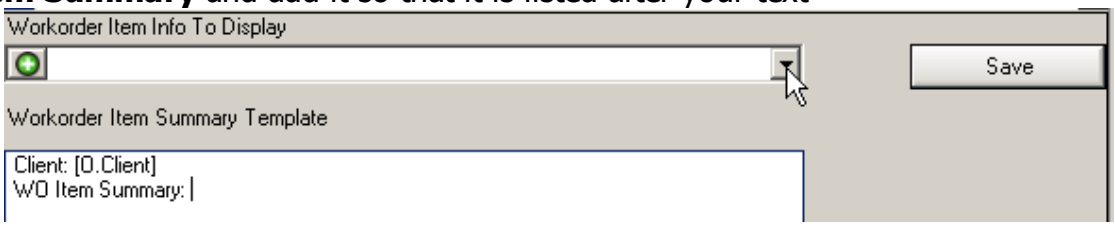


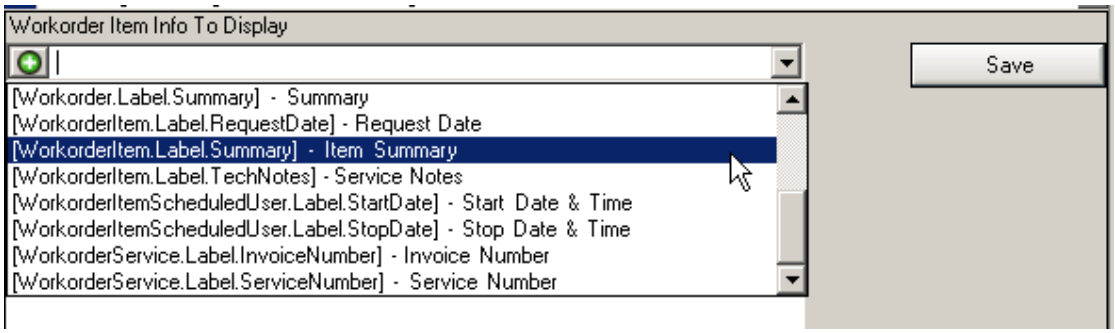
9. Click on the Add button to the left to add this selection into the template design field and see how it adds that datafield into the template





10. In the template section press the Enter key on your keyboard so that you move to the next line, and type on the next lines **WO Item Summary:** and then drop down the list of tags again and select the **[Workorder.Label.Summary] - Item Summary** and add it so that it is listed after your text





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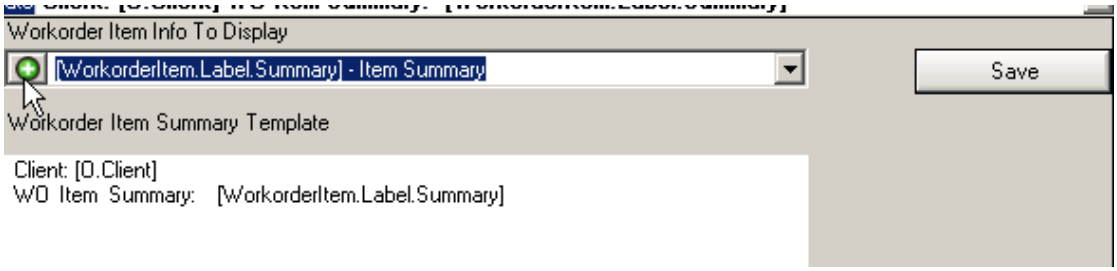
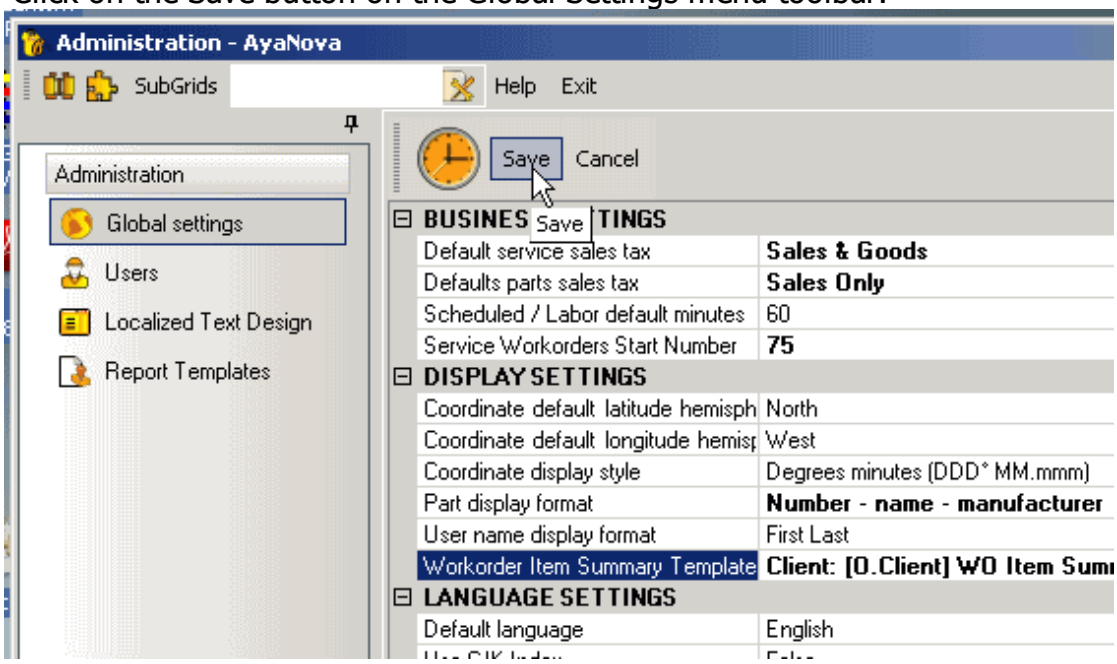


11. Click on Save button to close and save the Template Editor

12. Click on the Save button on the Global Settings menu toolbar.



13. Exit out of AyaNova, and log back in (when making a change in Global Settings, you **need** to save and exit completely and log back in for the change to take effect for you).

14. Now lets take a look at what the new Workorder Summary looks like from the Schedule screen

- Move to the Schedule screen
- Hover your mouse over the same workorder item that you did previously

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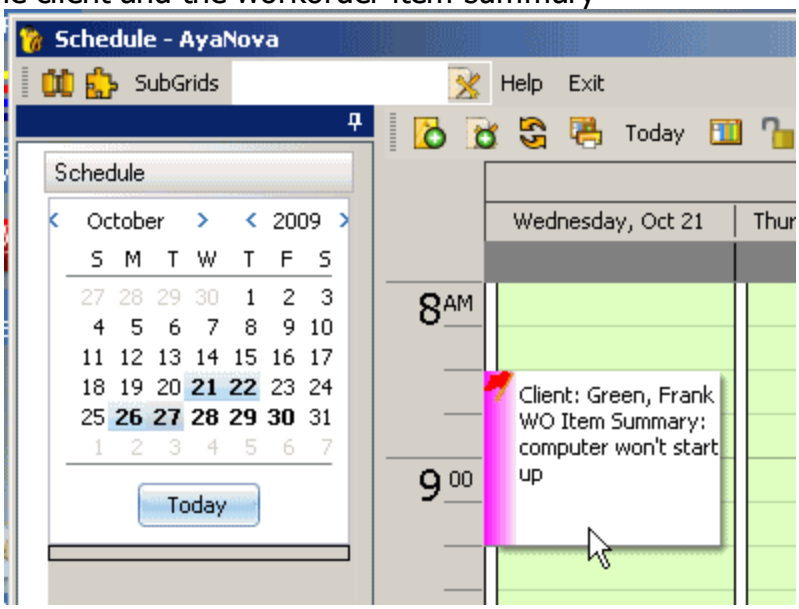
- You will see that it now will display as you have designed - in this example, just the client and the workorder item summary



We encourage you to edit the Workorder Summary Template to display what is needed on the available datafields.
The default Workorder Summary Template is (in case you want to copy, paste, save, to go back to what it was originally)

[WorkorderService.Label.ServiceNumber]
Client: [O.Client]
Tech: [O.WorkorderItemScheduledUser]
ZONE: [O.DispatchZone]
WO summary: [Workorder.Label.Summary]
WOITEM summary: [WorkorderItem.Label.Summary]
Tech notes: [WorkorderItem.Label.TechNotes]

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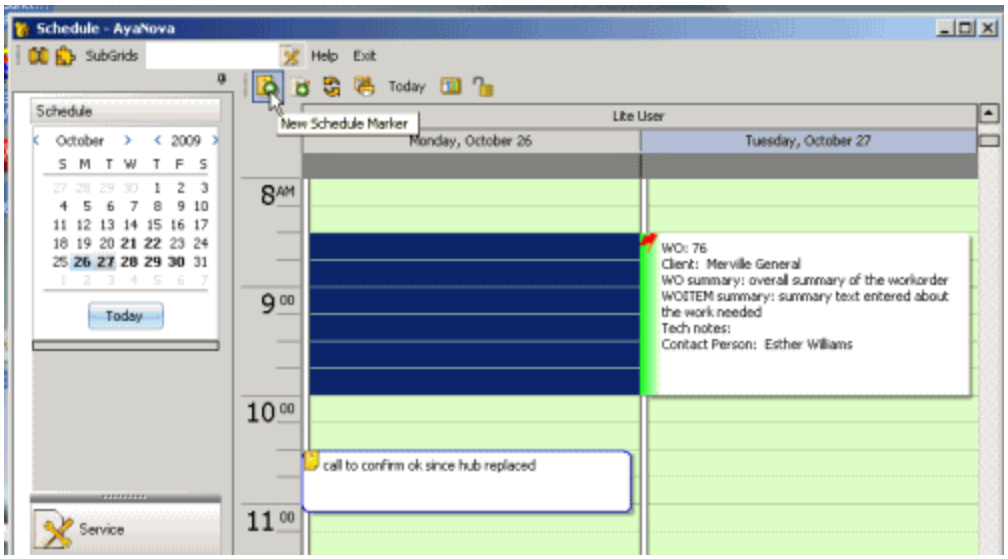
5.11 Duplicate a Schedule Marker

The Duplicate menu option allows you to make a duplicate of the existing object to help cut down on double entry. You can duplicate a part, duplicate a unit, duplicate a client, duplicate a security group and/or duplicate a schedule marker.

In this tutorial example, we will go over the initial steps of creating a schedule marker and then duplicating it.

- Let's say that a schedulable user has four exams happening over the next couple of weeks for their certification and they want to enter in a marker to display regarding this so that the dispatcher knows not to schedule service in these time periods for the user.
- Each exam is going to occur on the first Tuesday of each week for the next five weeks.
- Rather than having to make four separate Schedule Markers and re-enter all the information for each, you can duplicate (copy) a Schedule Marker.
- NOTE: screenshots in any of these How do I...?'s tutorials may not be exactly as in your database as dependant on your data, grid layout, etc

1. Create the first Schedule Marker and save and exit.



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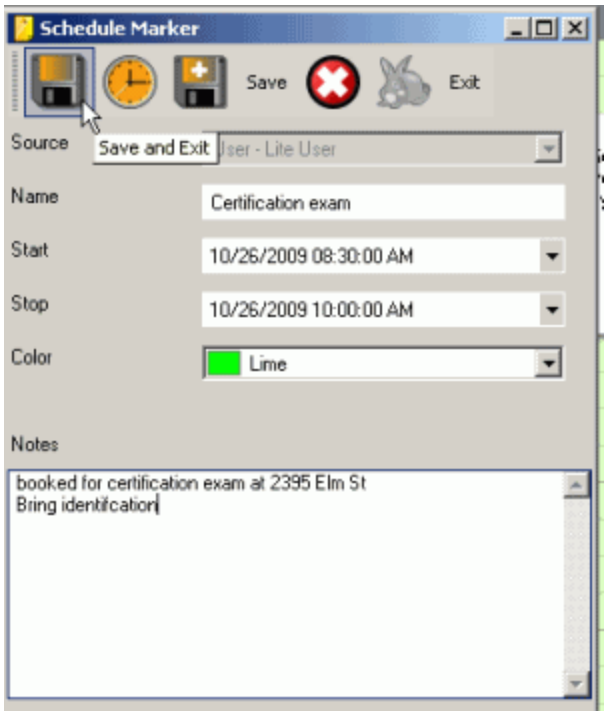
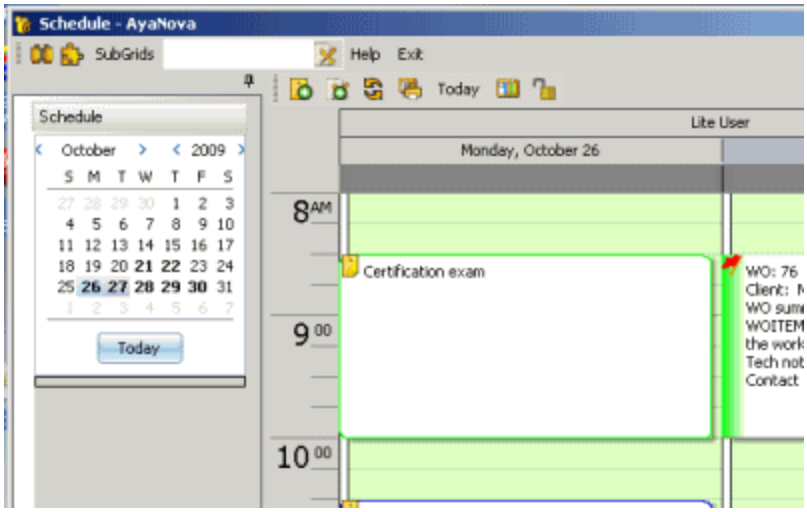


2. See the marker on the calendar



3. Now open that Schedule Marker (either double-click on it, or select it and then select the Edit Schedule Marker menu option)

4. Within the opened Schedule Marker, select the menu item Duplicate

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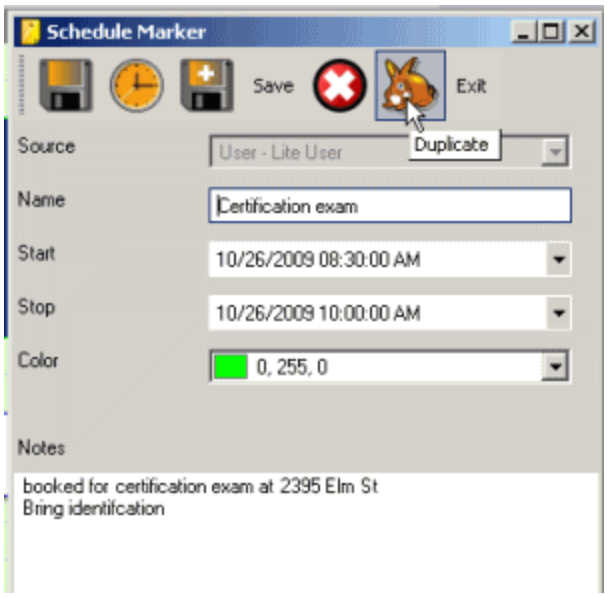
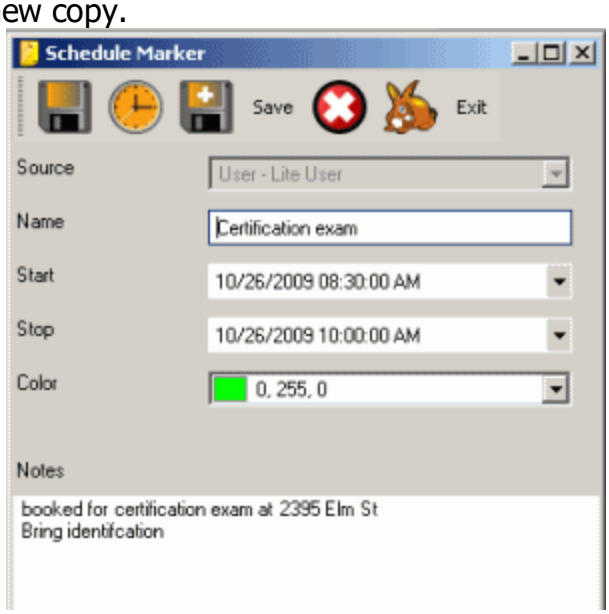


5. This will cause the first schedule marker to close, and an exact copy is now displaying. Note that the Duplicate button is now grayed also indicative that it is a new copy.



6. Edit the **Start Date Time** to the new date and time, and the edit the **Stop Date Time**.

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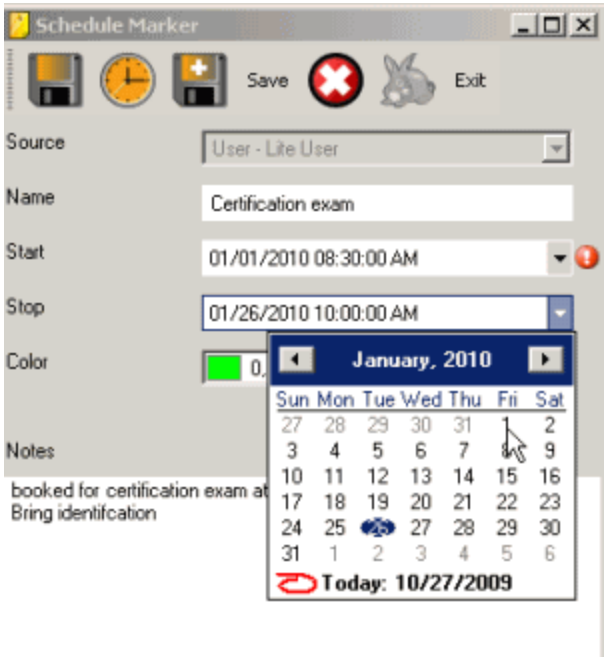
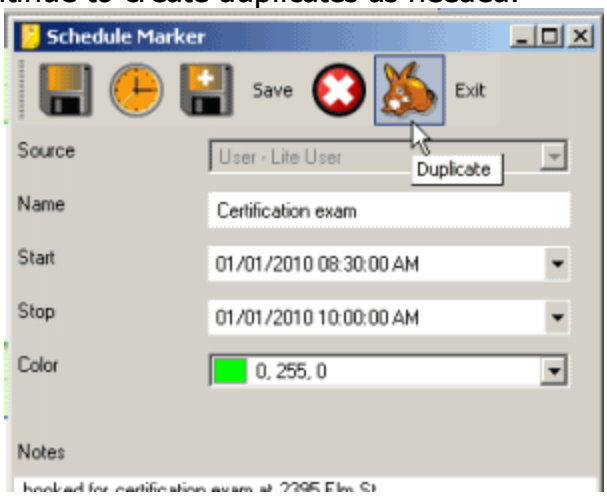


8. Now select the Save button

9. See how the Duplicate menu option now shows again, so that you can continue to create duplicates as needed.



NOTE: you could also have just selected the Save button when you first created the Schedule Marker, so that you could duplicate without having to open it again.

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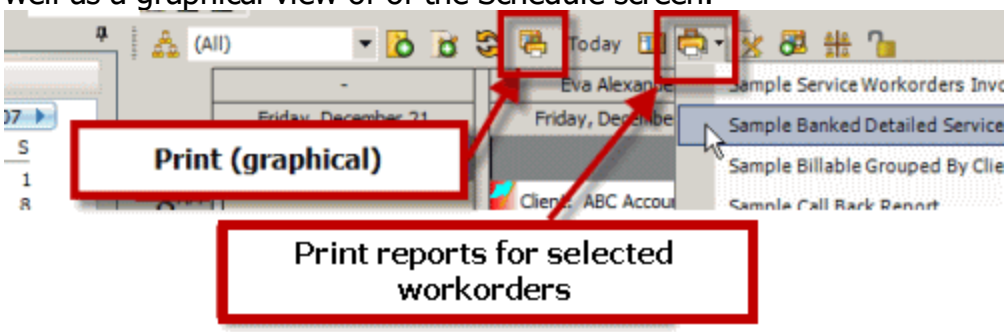
5.12 Print out a graphical day view of the Schedule

You can print standard workorder reports from the graphical Schedule screen, as well as a graphical view of of the Schedule screen.



Some people prefer a graphical printout rather than a printed list so that they can see at a glance when their time is booked throughout the day.

In this tutorial example, we will go over the basic steps of printing out a graphical day view of the schedule for your self.

- It is highly recommended that you review this Online Help entire section on the Schedule Screen and Printing for complete overview , suggestions on use, tips on use and more.

1. View a specific date on the Schedule screen that has a number of scheduled items for schedulable users (so you have something to show in the print preview).

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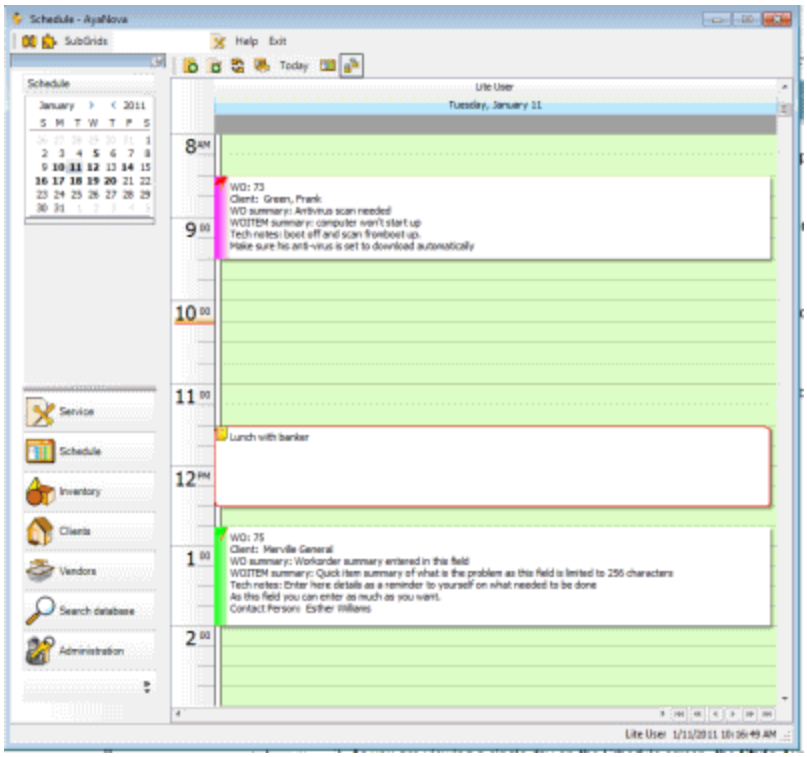
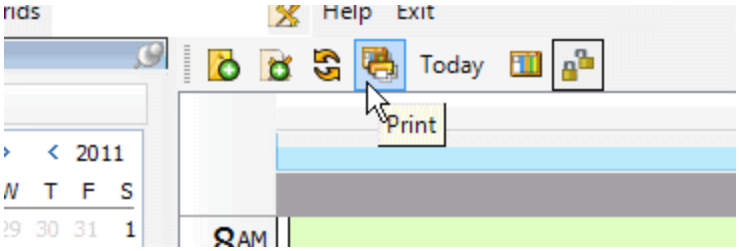


2. Select the Print graphical menu option in the Schedule screen and the **Page Setup** screen displays



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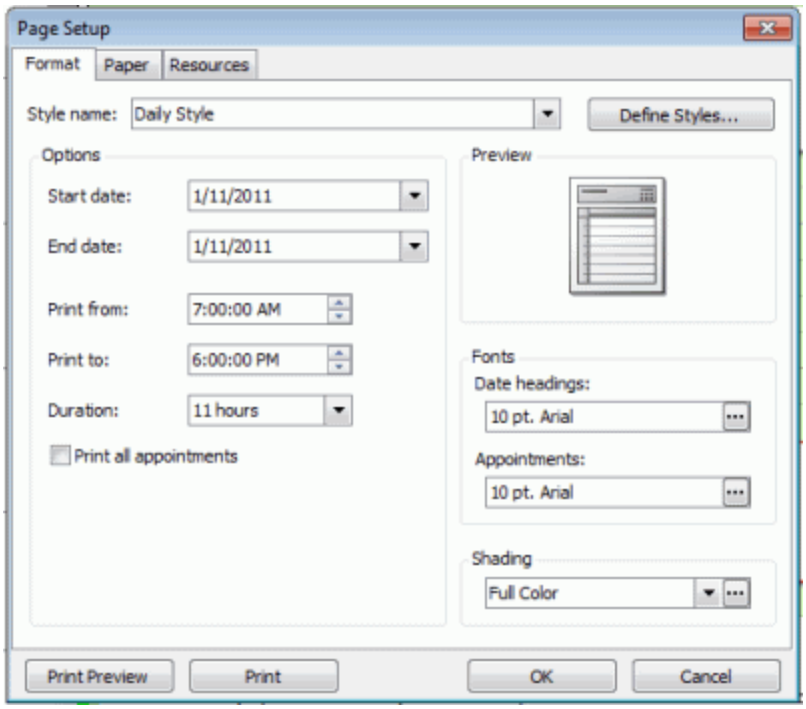
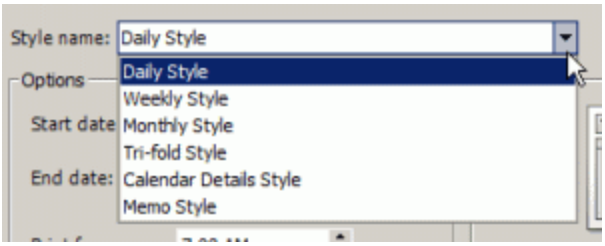
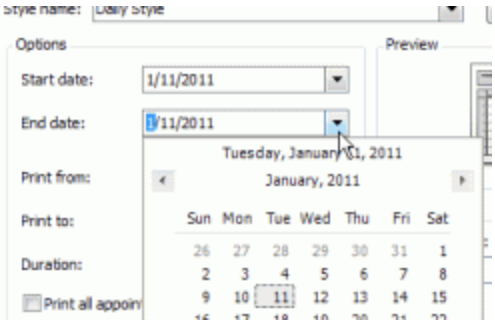


3. As you are viewing a single day on the Schedule screen, the **Style Type**: defaults to **Daily Style**



4. The **Start Date** and **End Date** will default to the same date you are viewing on the Schedule screen.



5. The Page Setup defaults the Print From: as 7:00AM and the Print to: as 6:00PM. You can edit this if you want by using the up and down arrows, or highlighting and typing in the time. In this example, we will leave as is.

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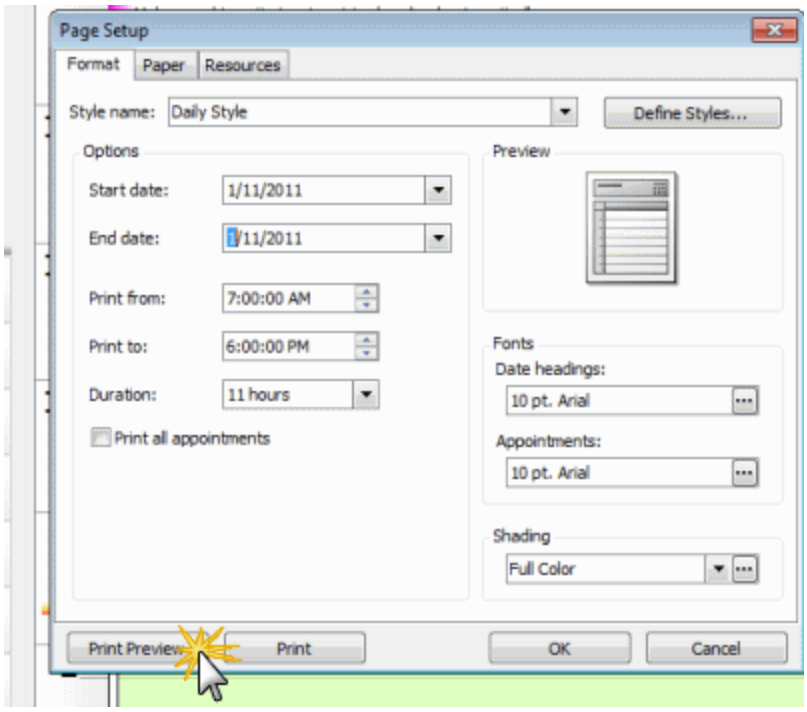
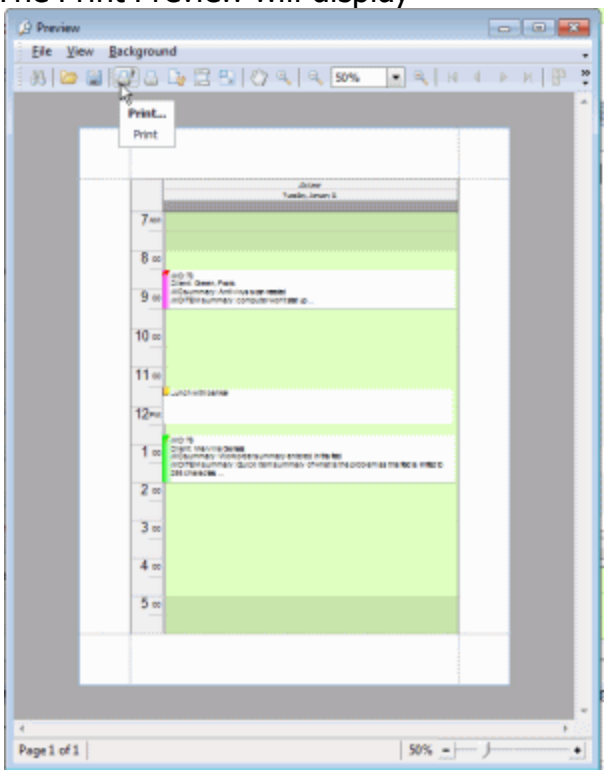
6. Select **Print Preview** so that you can preview what will print out



7. The Print Preview will display



8. To print this to your printer, just select the Print menu option

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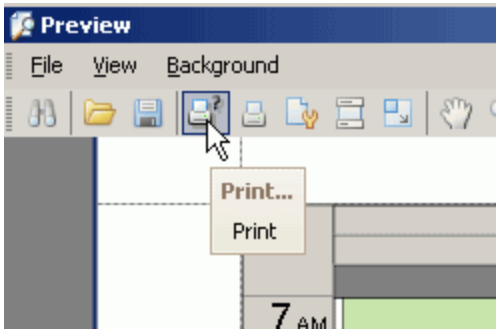

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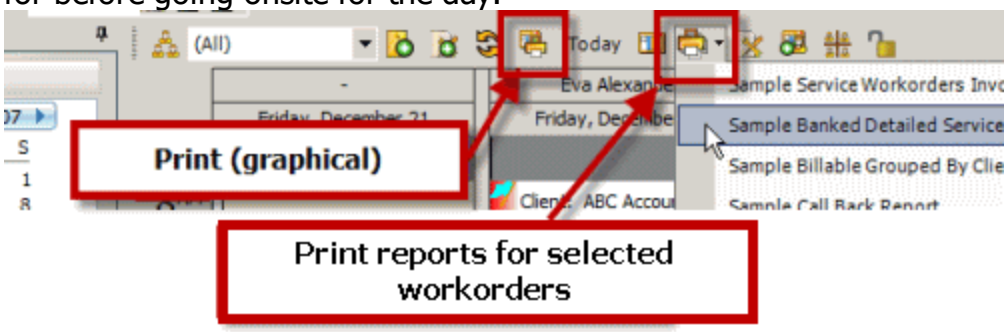
5.13 Print out dispatches for myself from the Schedule screen

You can print service workorder related reports from the Service navigation pane grids, as well as print from the Schedule screen. For example, a technician might want to print off the Dispatch Reports for each workorder he is performing service for before going onsite for the day.



In this tutorial example, we will go over the basic steps of printing out the Sample Dispatching Reports for all workorder items of a single schedulable user via the Schedule screen.

- It is highly recommended that you review this Online Help entire section on the Schedule Screen and Printing for complete overview , suggestions on use, tips on use and more

1. View the Schedule screen
2. Hold the CTRL key on your keyboard and use your mouse to click on each of the workorder items that you want a dispatch report printed for. You can tell that they are selected because they will be highlighted as shown in the screenshot below we have selected three scheduled workorder items

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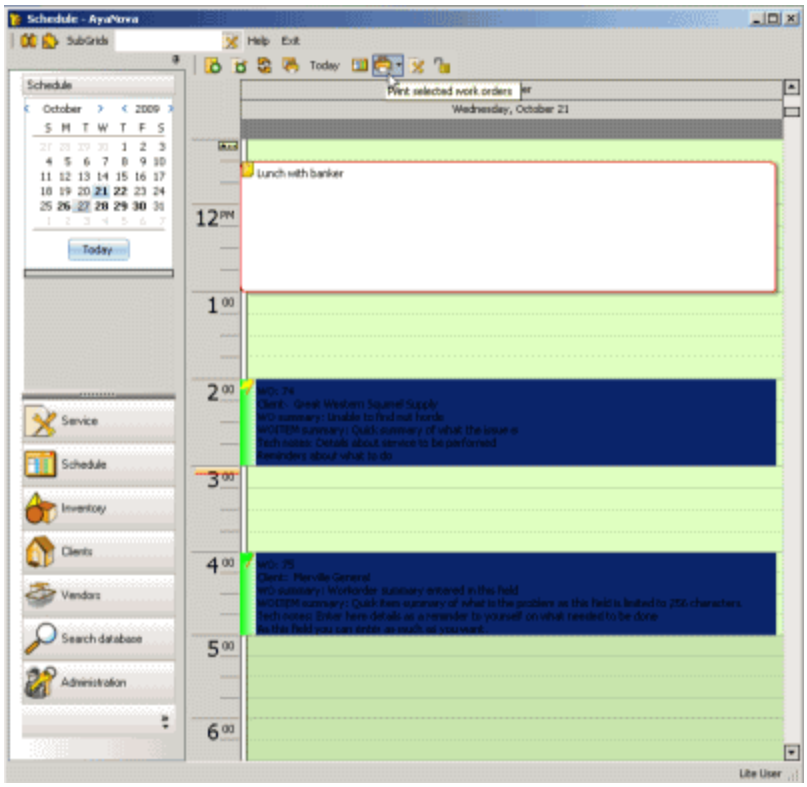
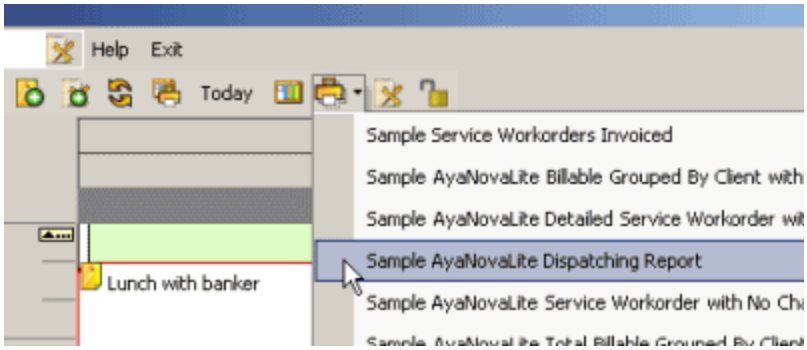


3. Now select the drop down menu option **Print** selected work orders

   - Do note that this menu option only appears once you have selected one or more workorder items



4. Select the report you want to print - in this tutorial, we will pick the **Sample AyaNovaLite Dispatching Report**

5. The Print Preview of the report displays. Print as desired

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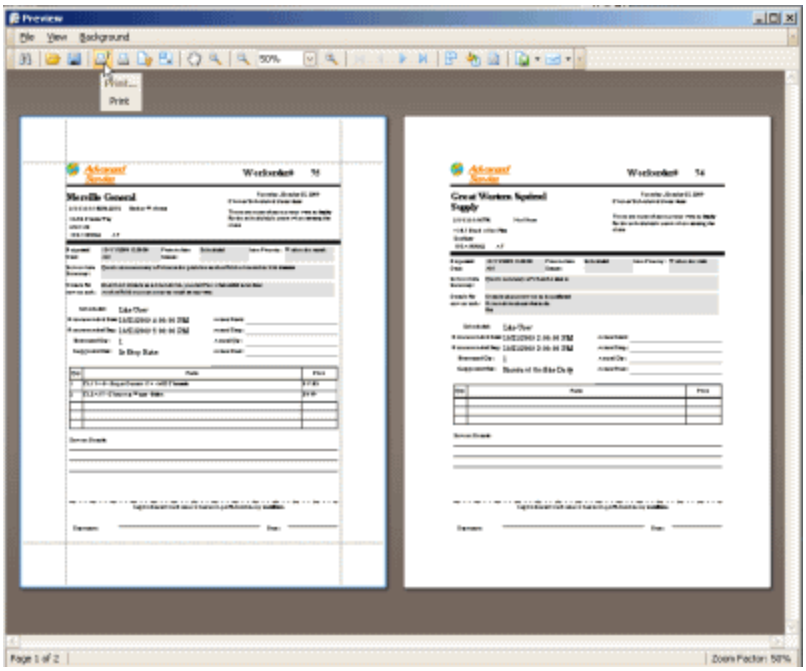

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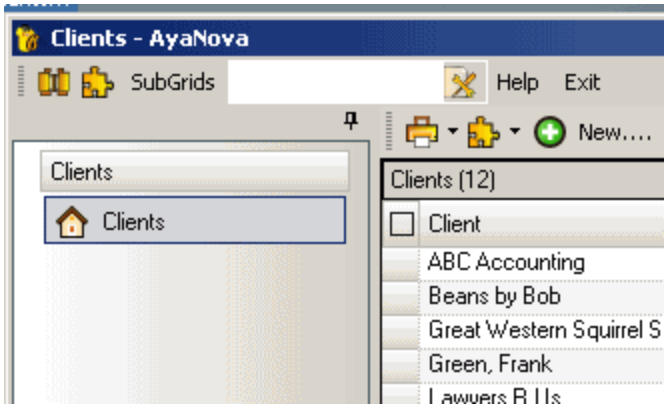
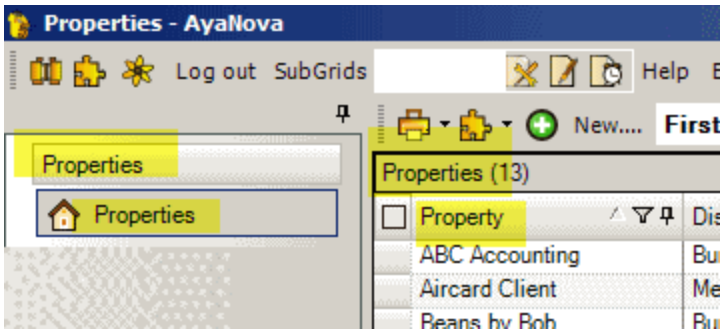
5.14 Create a new custom locale using the Localized Text Design

In this tutorial we will go through the steps to create a new locale and then customize it so that labels in AyaNova display as you want them to.

- Localization is not just for different languages.
  - For example, you may be in property management service and want what is labeled as *Clients* or *Client* throughout AyaNova to display as *Properties* or *Property* instead



vs



- It is highly recommended that you review this Online Help entire section on Localized Text Designer section for complete overview , suggestions on use, tips on use and more.

There are 4 major steps:

1. **Creating a copy of the existing English locale**
2. **Edit the newly created locale**
3. **Assign users to use the newly created locale**
4. **Log in and see the new labels**

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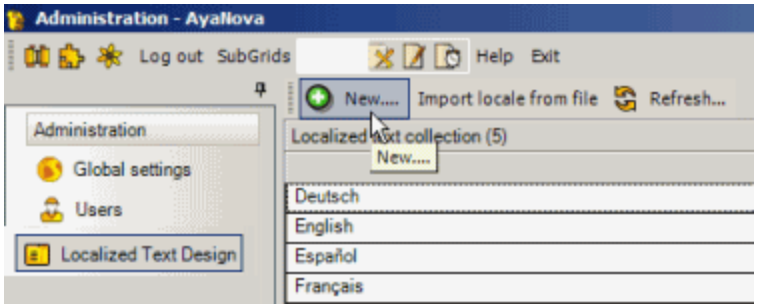
1. Creating a copy of the existing English locale

1. The English locale is itself not customizable. Only a copy can be of it, and than that copy can be customized.

2. Select the menu option New… from the Localized Text Design menu toolbar



3. Select the source to copy from, and the new locale's name

   a. Select the source locale **English**

   b. Enter in a descriptive name for the custom locale – so that it is easy to know what to select when selecting it for each user within AyaNova.

      i. The name field is restricted to no more than 15 characters.

      ii. In our example, we entered **My Locale**

   c. Select OK

4. Be patient while it copies all master localized text to this new locale name

5. Your custom Locale now displays.

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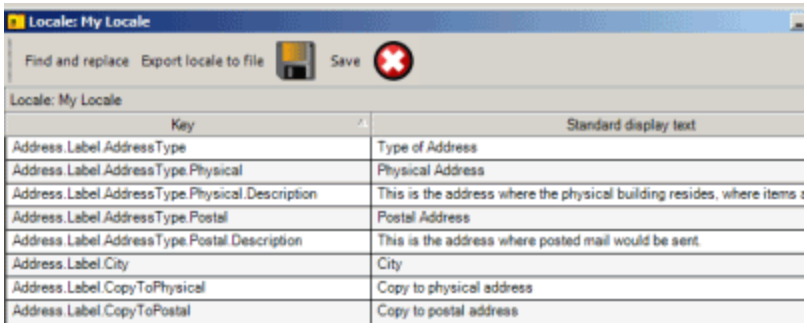
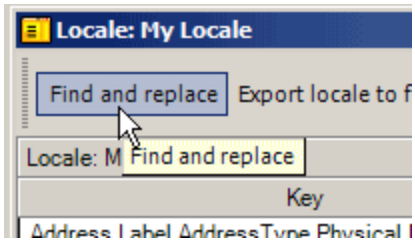


2. Edit the newly created locale

6. A quick way to replace specific text, is to perform a search for it, and replace it with the new text.

   a. For example, if we wanted to replace throughout AyaNova all instances of the text label Client with the text Property even when it is part of another label (for example "Client reference #"), perform the following:

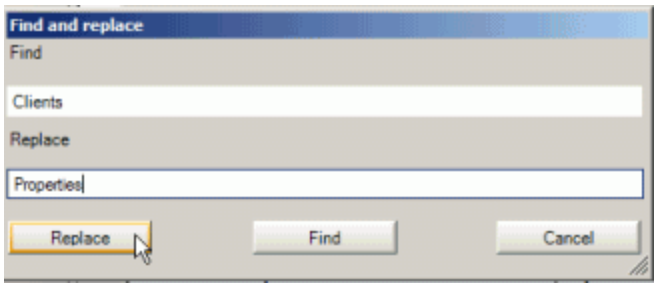
   b. Select the menu option Find and Replace



   c. Enter in the text Clients in the **Find** field

   d. Enter in the text Properties in the **Replace** field

   e. Select Replace



   f. If you then scroll down through the grid, the fields that were replaced will be highlighted so you can see

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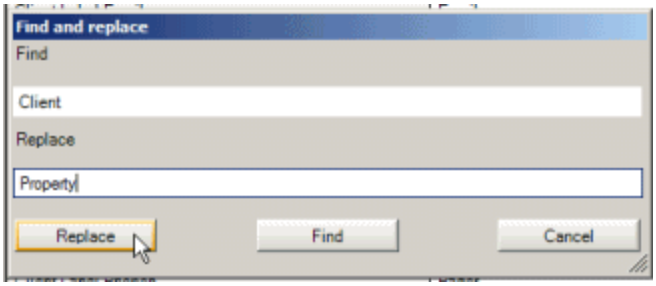
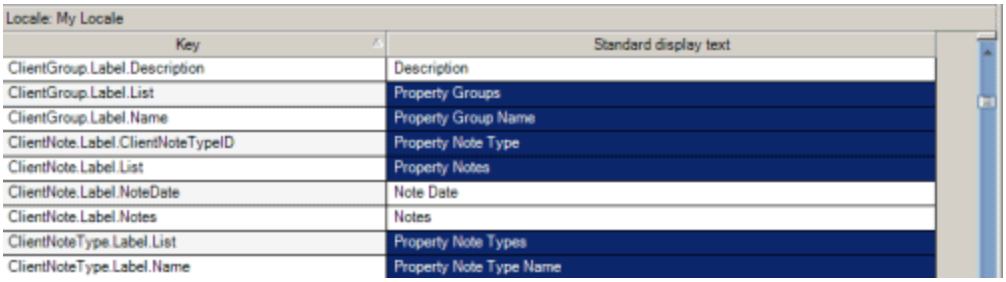
g. You can of course just use the Find option, so that you can manually edit each individually.

h. Now do the same steps as above but for the text Client to be replaced with the text Property





i. Save & Exit out of the new locale

3. Assign users to use the newly created locale

7. Now that your custom locale has been made, edited and saved, you now need to identify each user to use that custom locale

8. Move to the Users grid in the Administration navigation pane

9. Open up the user's entry screen, and edit its Default Language to the newly created locale you just made

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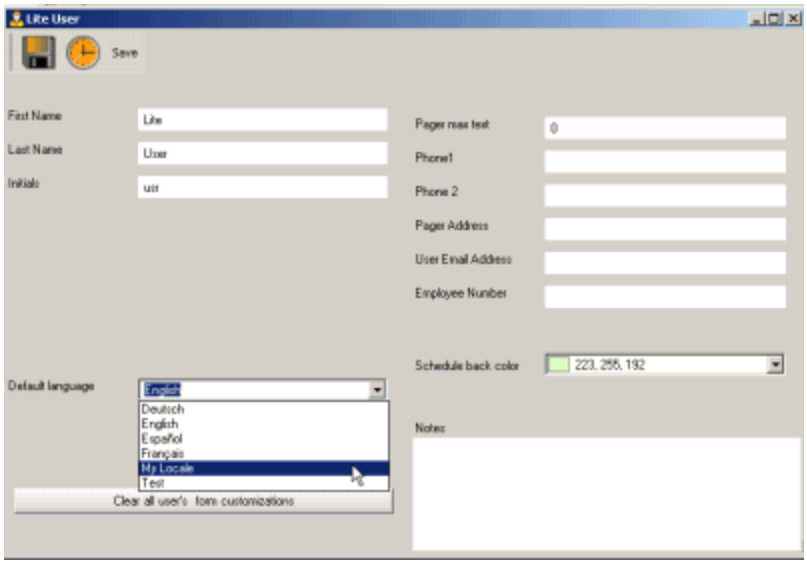

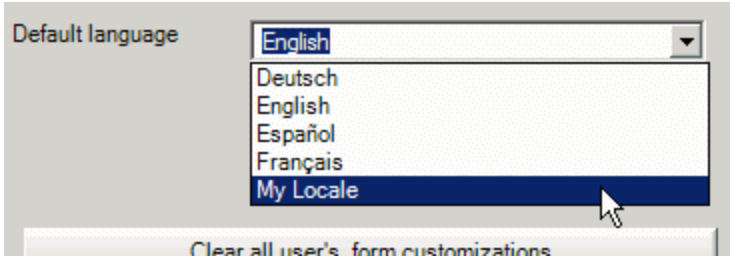

10. Save & Exit out of the user's entry screen

11. Continue for every user that you want to use this custom locale

12. Make sure each user exits out of AyaNova and logs back in - as a change in locale **does not take effect until** the user **has completely exited** and then next logs in. This is because localized text for labels is loaded **only** when the user first logs in.

13. Also you can set the Default Language in Global Settings to this new custom locale so any newly created users will default to using this new custom locale

4. Log in and see the new labels

14. Exit out of AyaNova and log in as one of these users that you changed the Default Language to the newly made custom locale

15. You will see that what used to be called the Clients navigation pane is now called the Properties navigation pane

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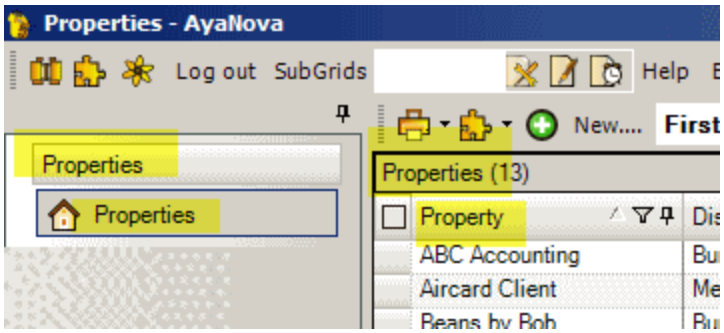

16. Open up a Property entry screen (used to be Client entry screen) and you will see that what used to be called Client Name is now called Property Name

17. Open up a service workorder. You will see that what was previously labeled as the Client jump button is now labeled as Property

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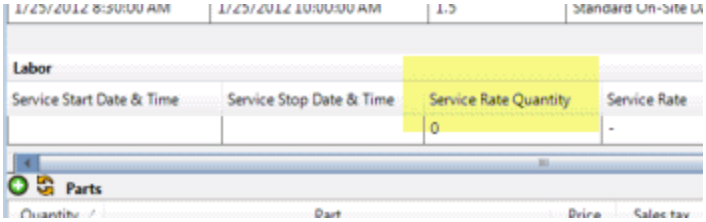
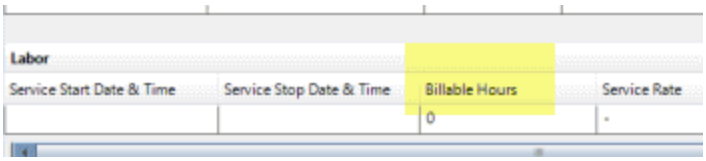
5.15 Customize an existing locale on the fly?

In this tutorial we will go through the steps to customize an existing locale "on the fly" so that the labels you are seeing of that entry screen display as works best for your company.

For example, you may be in the service workorder entry screen and want what is default labeled as Service Rate Quantity to instead be labeled as Billable Hours





There are 5 steps:

1. Select the Customize text... menu option at the top of the entry screen
2. Find the existing text listed
3. Edit the existing text
4. Exit out of the entry screen
5. Open up the entry screen to see the change

1. Select the Customize text... menu option at the top of the entry screen

Select the menu option for the entry screen's text labels you want to edit.

In this tutorial we want to edit what is default labeled Service Rate Quantity, so we will open a service workorder entry screen and select the menu option **Customize text**

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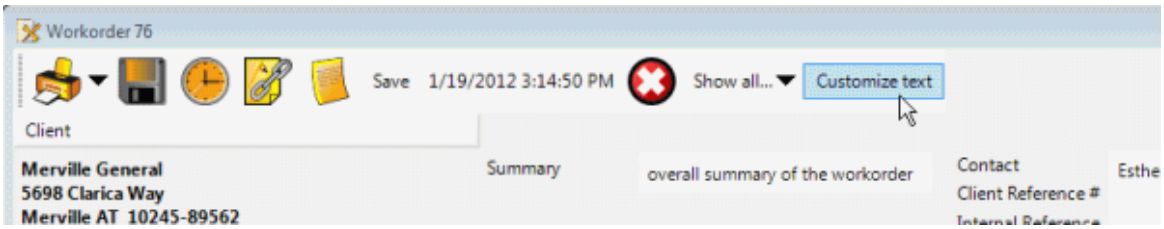
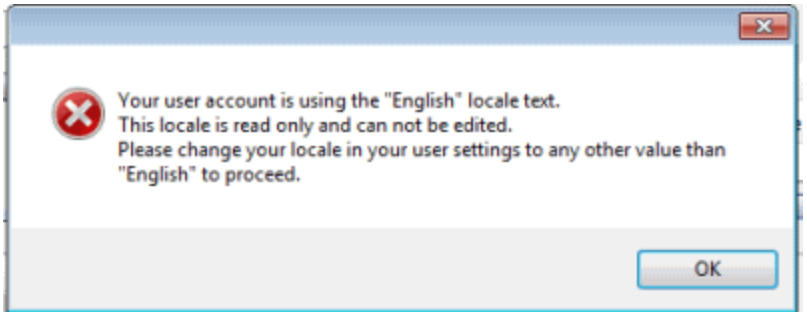


If you receive an message below, you MUST edit your user account under Administration selecting a custom locale that has been created instead.
You will need to **first** follow the tutorial on creating a new locale and assigning it to your user account first. Than you can come back and perform this tutorial.



2. Find the existing text listed

The existing label text is listed in alphabetical order.

Just scroll through the listed labels and find the existing label text.

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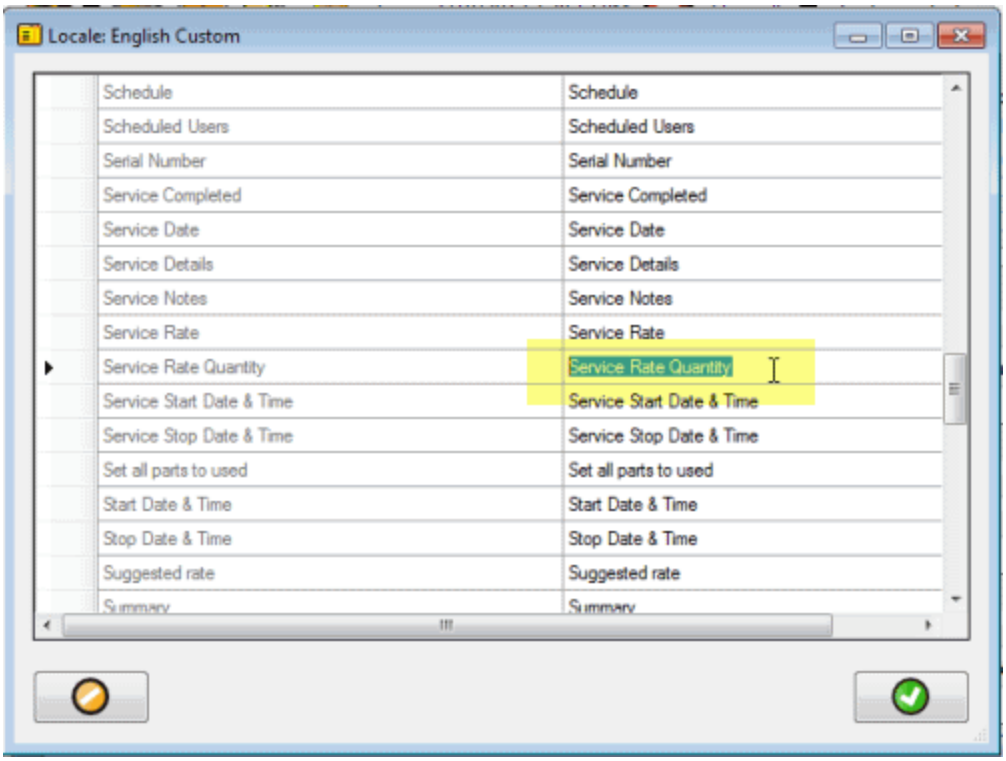
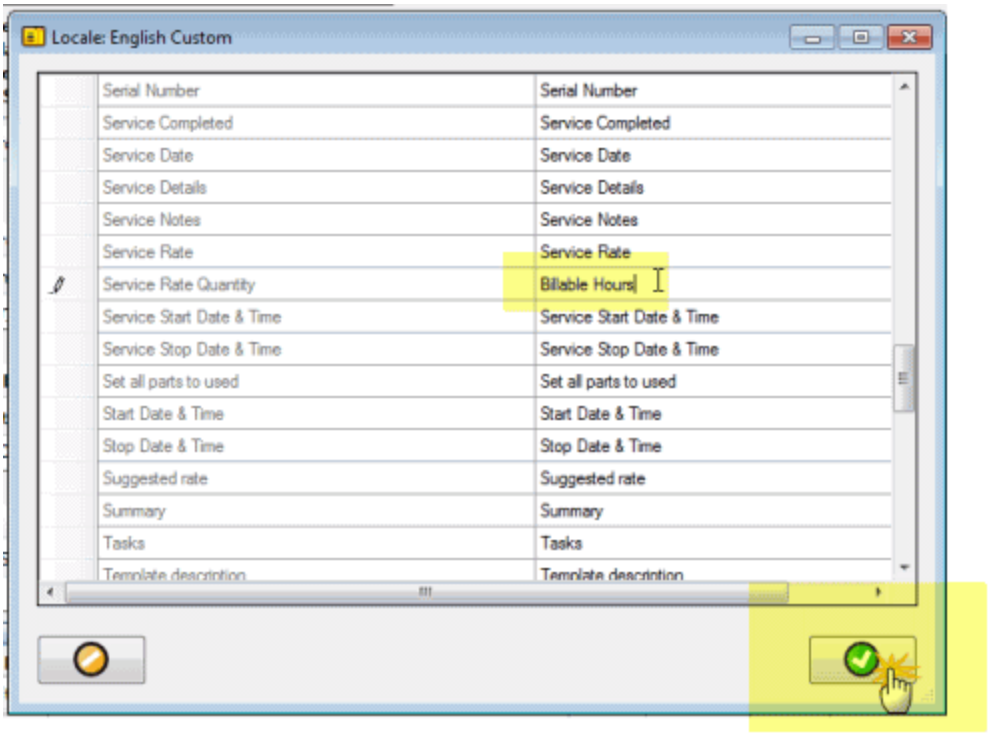


3. Edit the existing text and save



4. Exit out of the entry screen

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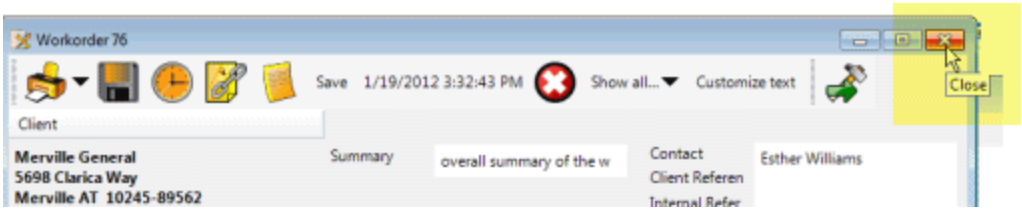
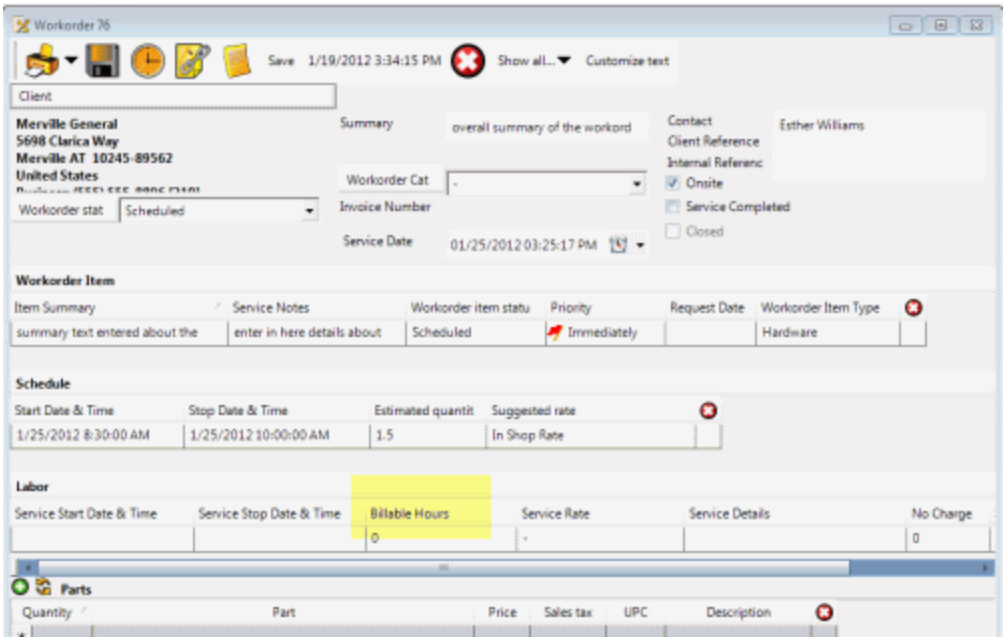
The new text label will not show until you have exited out of the entry screen.

Note if you have edited the text label for the main AyaNova navigation grids, you will need to exit out of AyaNova itself and then log back in.



5. Open up the entry screen to see the change



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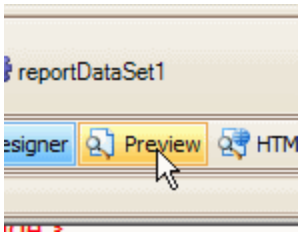
5.16 Put my company logo on a report template

In this tutorial example, we will go over the basic steps of putting your logo image into a report template.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

1. From the Schedule screen, double-click on an existing scheduled item. This way we are viewing a service workorder entry screen that definitely is scheduled.
2. Now we want to open an exiting report template in the Report Template Designer so we can customize that report template with your own logo
3. Select the Print menu option, hold the **SHIFT** key on your keyboard, and select the **Sample AyaNovaLite Dispatching Report** report template.
4. Note that it may take longer the very first time a report is opened for editing or preview since AyaNova was started as certain elements are not loaded in memory until they are required. Subsequent loads while AyaNova is open will be faster.
5. The internal report designer opens for this report template

   Lets preview the existing report template before we begin
6. Click on the Preview link at the bottom of the design panel



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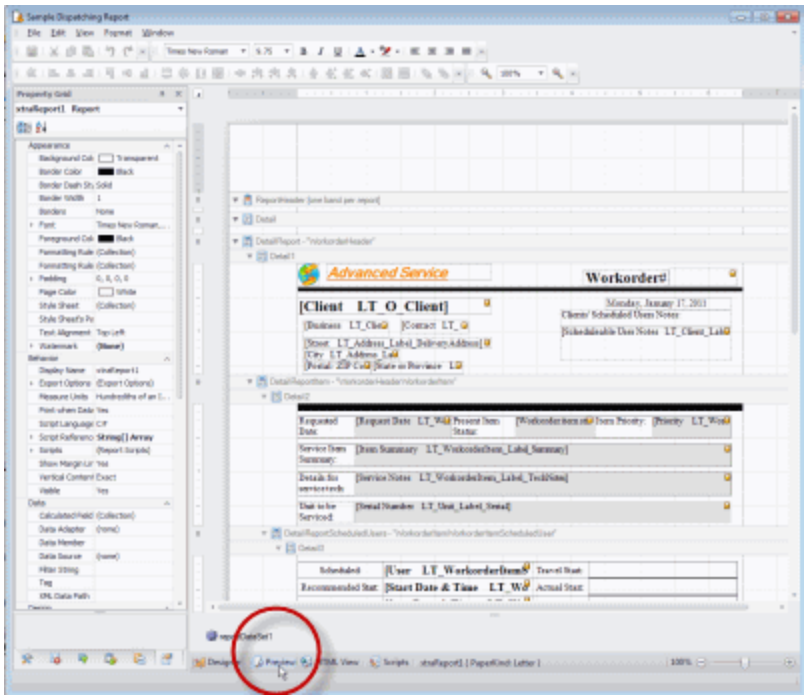
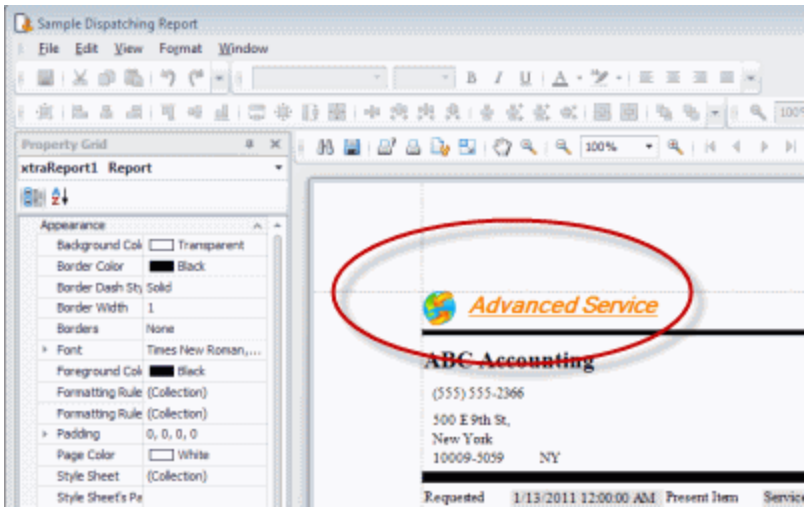


Note the sample company logo and name at the top of the preview



7. In this tutorial, we want to change the sample company logo and name to your own company logo and name. Remember, this is just an example to show you how to put your logo image into a report template - you will of course have a different logo image as well as different sized logo, or may be customizing a different report template, and may have your company name and logo combined in one image.

8. Select the Designer link at the bottom of the design panel to return to the design area of the internal report designer.

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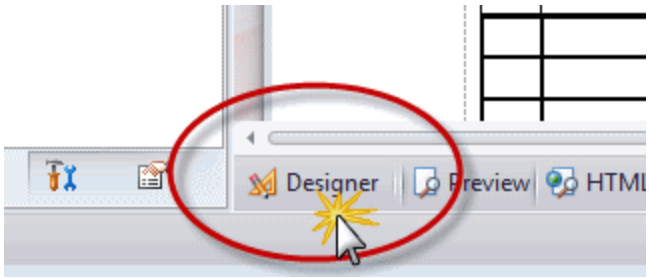
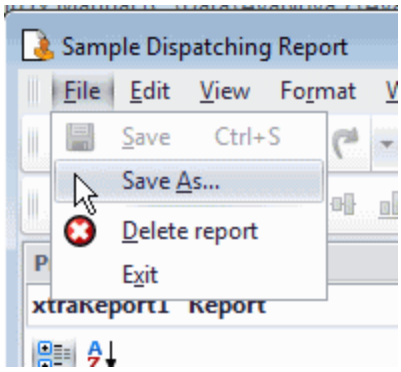
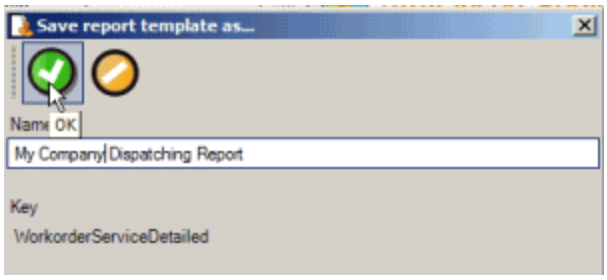


9. Although we do not have to make a copy to be able to customize an existing report template, we will in this tutorial and it is recommended to do so that if there is a problem with your customization, you can delete your customized report template and start again with a new copy.

10. Select the menu Report, and select Save As…



11. Prefix the report with **your** company name and select OK to save



12. Don't forget to click on Save every once in a while so that your changes are saved.

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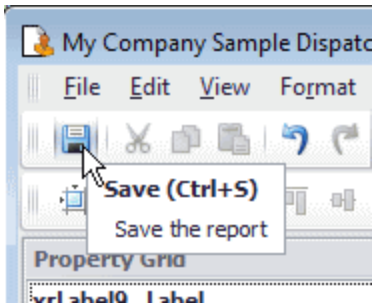
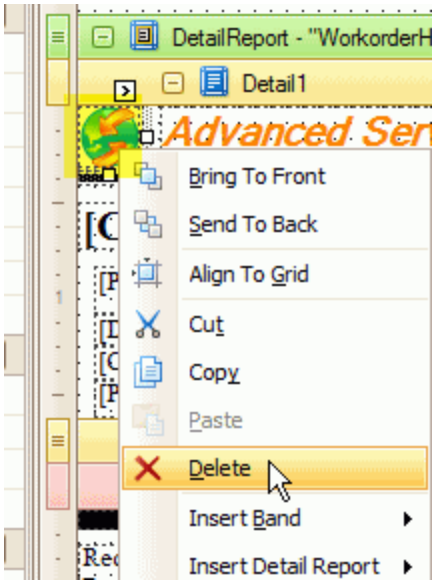


13. As want to replace the existing logo with another image, and change the text for the company name, we first need to remove the existing image and company name text

a. In the Design Panel, click on the existing logo image, right-click and select Delete



b. Click on the existing company name text and press the Delete key on your keyboard

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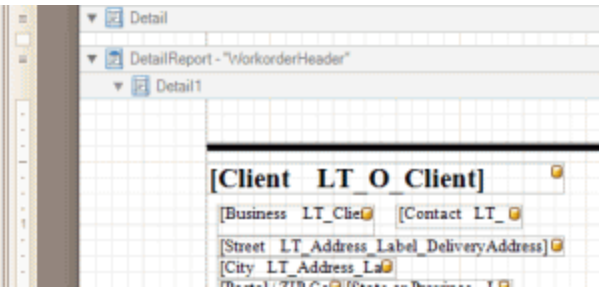
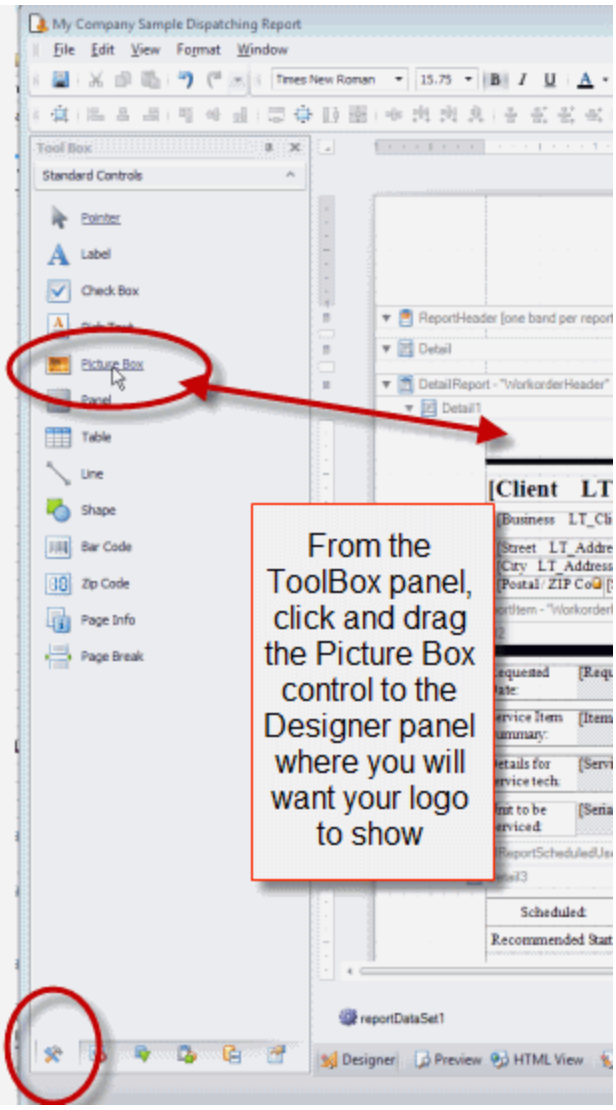


14. Now select the Toolbox tab on the bottom left, select the PictureBox control and drag using your mouse onto the Design Panel



15. As you drag, your mouse turns into a symbol until you drop the control onto the design panel

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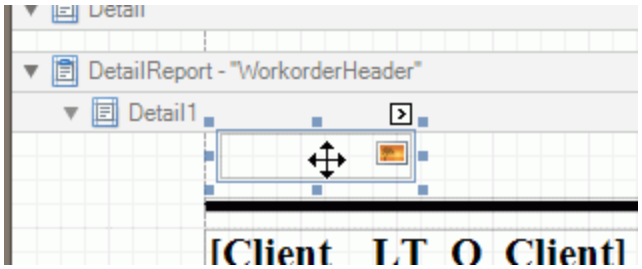
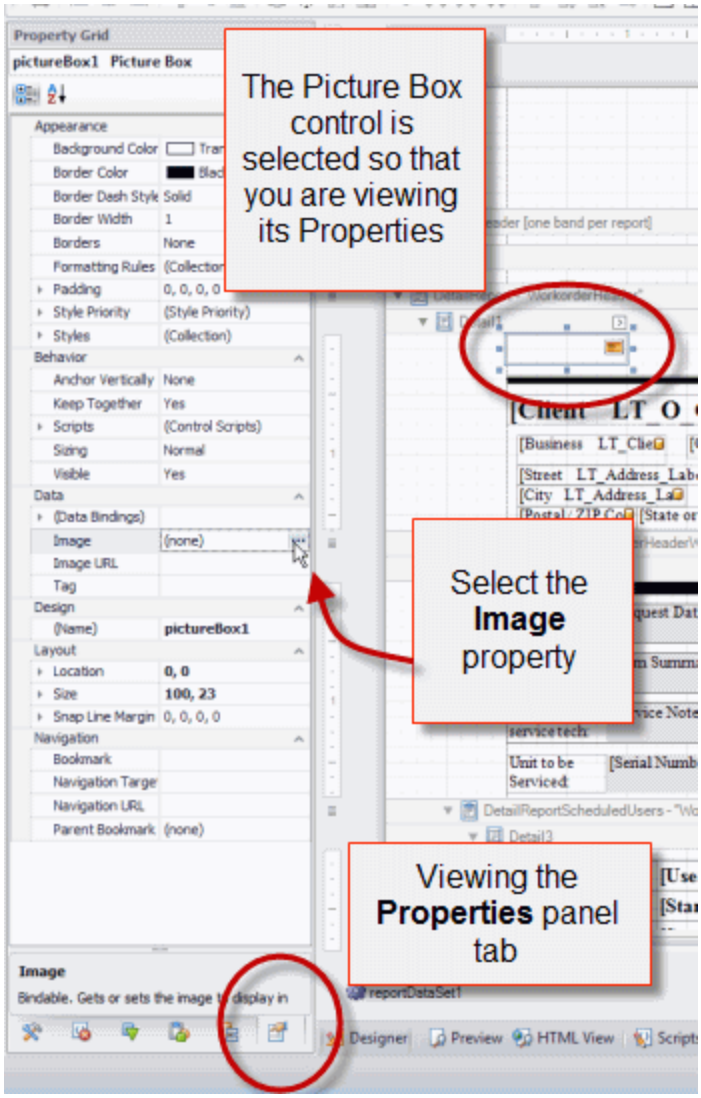


16. With that control you dragged over still selected, click the Properties tab, and select within the Image field to to open the window to select your image file you want to show on this report template.



17. Move to the location of your image and select it. Click Open (do note of course that your selection will be different, as well as the location will be different)

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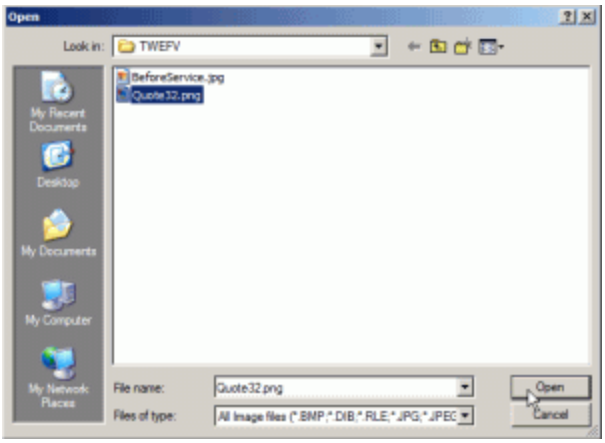
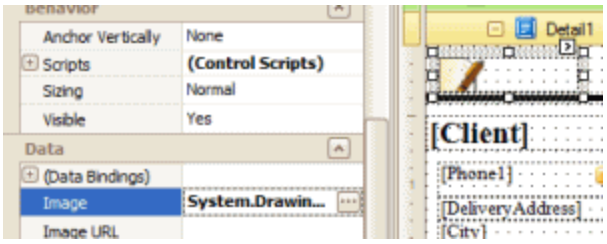


18. The image is now bound to the PictureBox control



19. As your image could be any size, you may need to edit it, such as moving other fields around.

In the screenshot below we have moved all other fields down further in the Detail1 area so that our image shows properly and does not overlap other controls we wish to place here.

Easiest way to move a bunch of fields at once, is to use your mouse, the CTRL key and left click button to select all of the fields at once, and then use your arrow on your keyboard to move the fields down or up or sideways etc

It is recommended that before selecting the image file, that you already have it's dimensions sized to fit how you will want it on the report template via an image manipulation program.
For example, do not select an image file that is 1000 x 500 bytes, as it more then likely will also be quite large in MB size which can affect how fast your report will print. Instead, resize the image in a utility which will make it smaller in size in dimension as well as bytes.

You could also use the Sizing property in the Behaviour area to center, zoom, etc.

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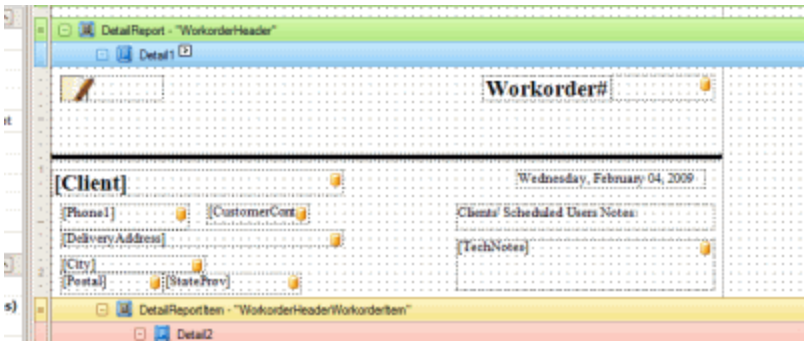
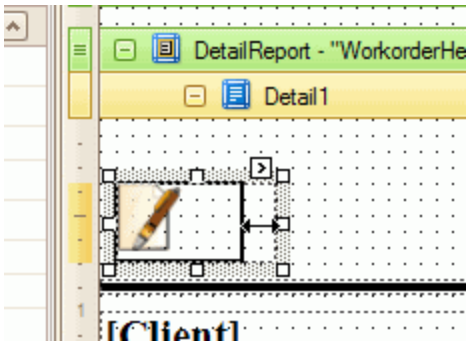
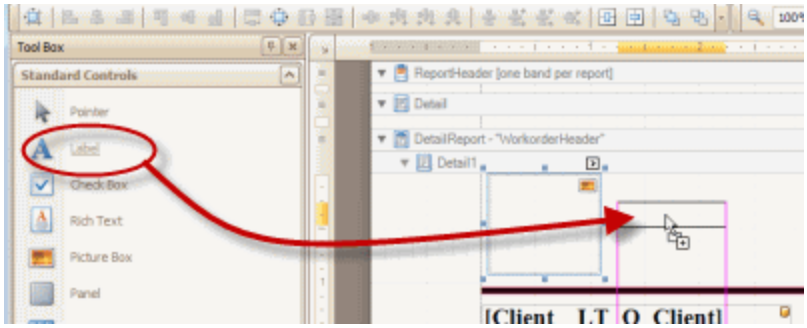




20. Your image may already include text. In this tutorial we will add the company name text beside the image.

21. Select the ToolBox tab, select the Label control and drag onto the Design Panel and drop onto the location beside the image.



22. Select the Properties tab, with this label control still selecting, enter in the Text property field your company name. In our tutorial, we will enter in **My Company Name**

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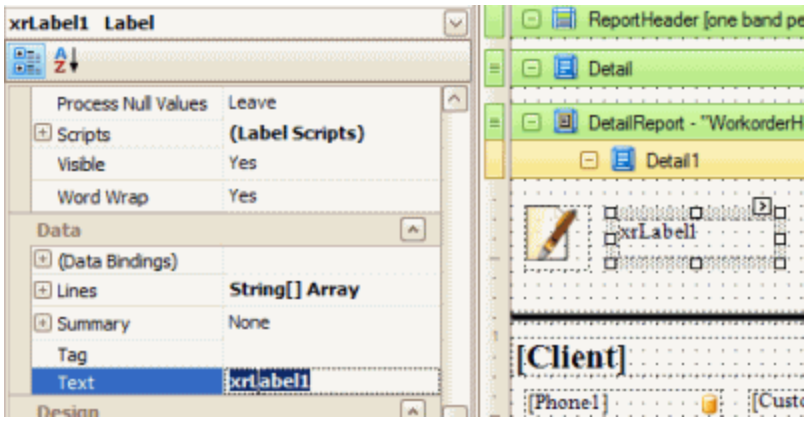
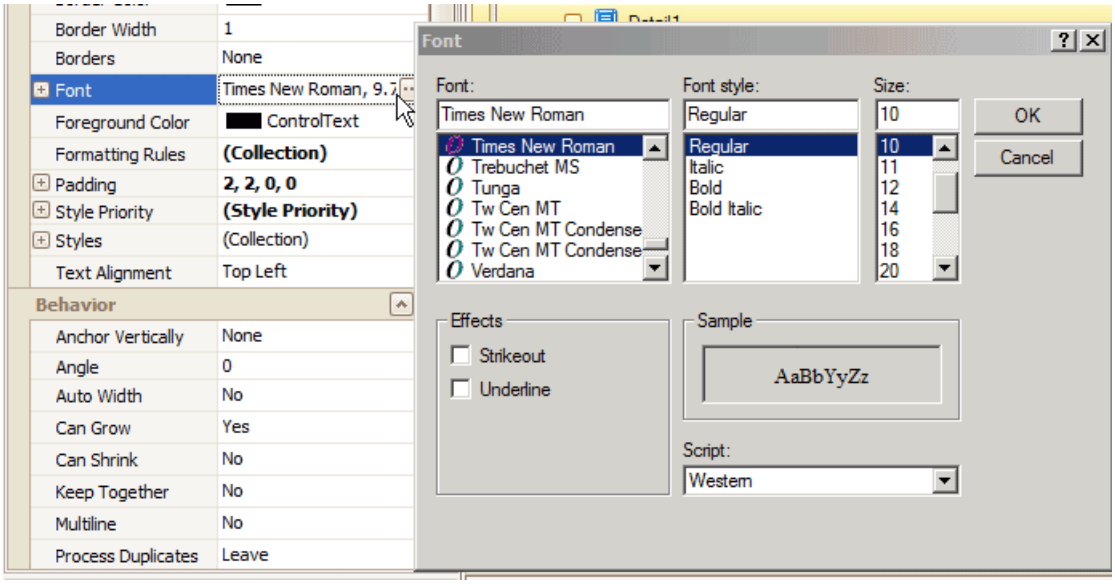


23. As in this tutorial we want this text to display in a different font, plus a larger size, we need to edit the properties of this label field.

24. Select the browser button for the Font property field for this selected label control to open up the Font properties



25. Change the font such as to **Courier New**, Bold and size 14, and select OK

26. If you view the label control, you will note that some of the text is cut off. Resize the label control to display all the text by hovering your mouse over the left side and click and drag

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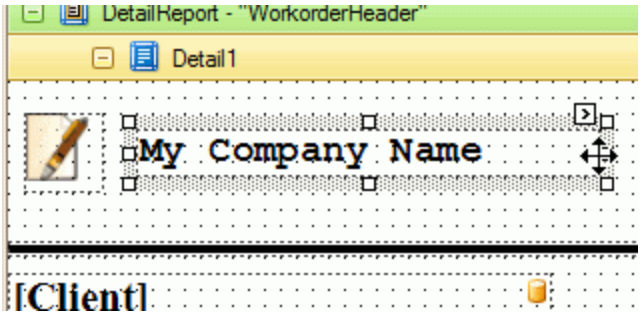
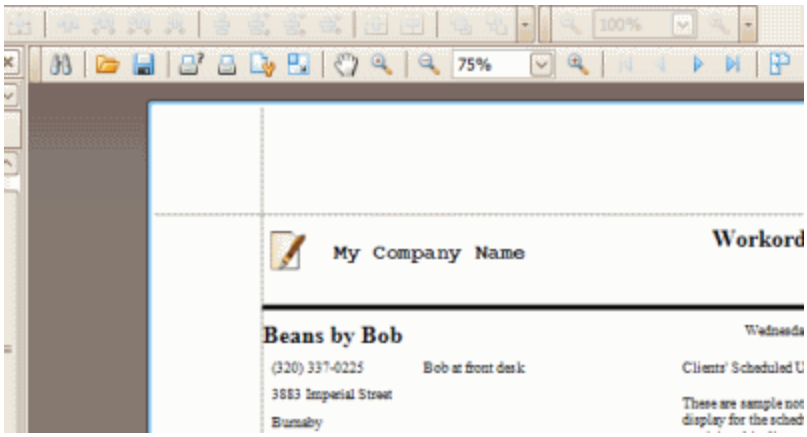
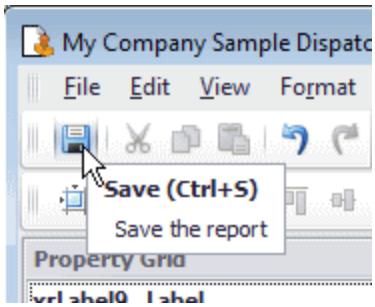


27. Select Preview link from the bottom of the Design Panel so you can see what this looks like on an actual report.



28. Make any additional changes to sizing, location, etc and Previewing so you can see what the result is before saving.

29. Don't forget to click on Save every once in a while so that your changes are saved.



30. Your custom report template is now selectable from the Service Workorders grid, and from within a service workorder entry screen.

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5.17 Add additional data to show on a report

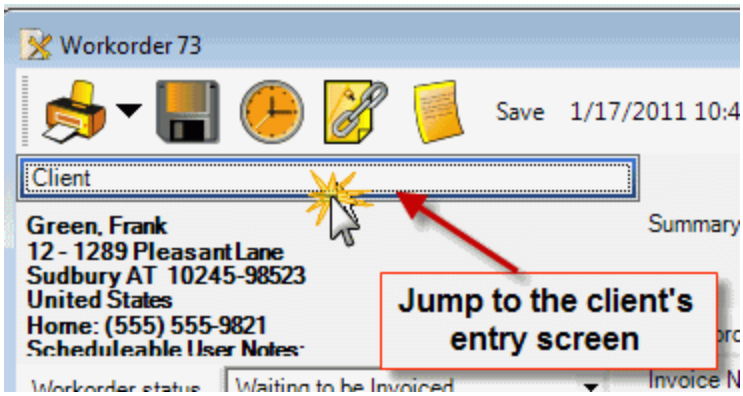
In this tutorial example, we will edit an existing sample report template so that it displays additional fields of data.

For this tutorial, we want that in the Sample Dispatching Report we want the Other Contacts text from from the Client's entry screen to show, and we want to force the Price to always display in US dollars regardless of the regional settings of the computer in use.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

1. Confirm there is text in the Other Contacts field in the Client's entry screen (so it can show on a report template)

   a. View the client's entry screen by selecting the Client jump button within the service workorder entry screen



   b. View the Other Contacts field in the client's entry screen - make sure there is text in it.

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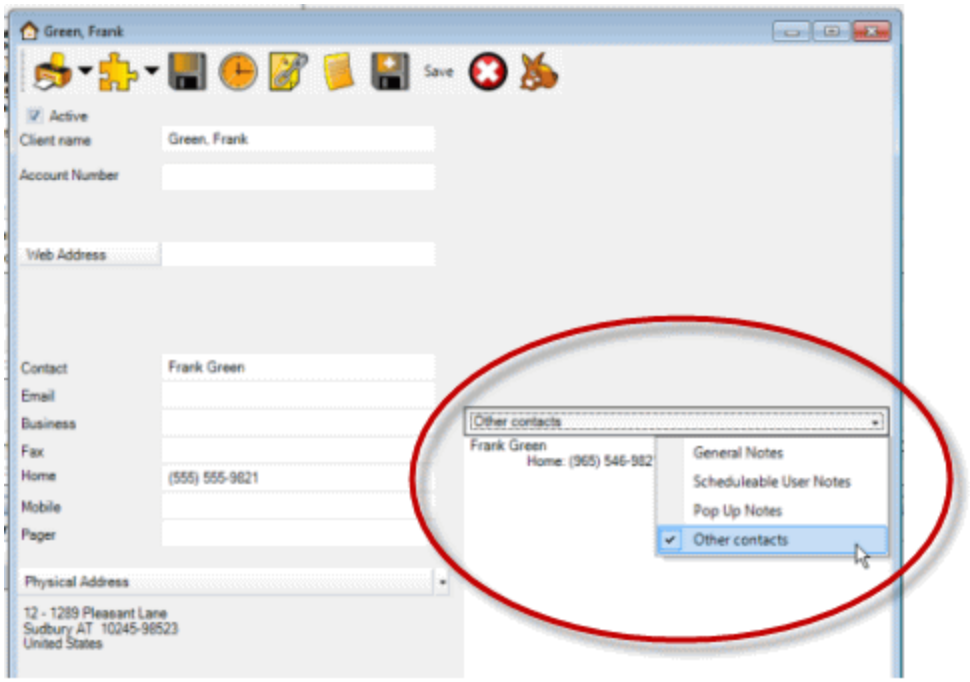

c. If entered any text in that client's entry screen, don't forget to Save & Exit which will return you to the service workorder entry screen

2. Now open the report template you customized in the **previous tutorial** the copy of the the Sample AyaNovaLite Dispatching Report - via the Report Designer (hold the SHIFT key and select the report template via the Print menu option)

3. In this tutorial, we want to have the Other Contacts field from the Client entry screen display under the Schedulable User Notes on the report.

   a. First we need to make more space in the WorkorderHeader detail area so that we can place the *Other Contacts* datafield

   b. Adjust the height of the WorkorderHeader detail area by clicking and dragging on the bands - you will note that your mouse changes as you click and drag

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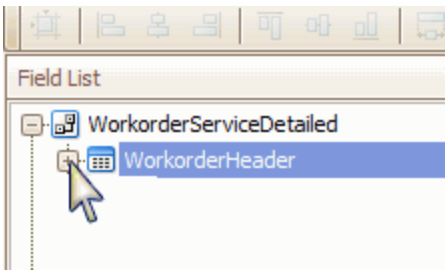
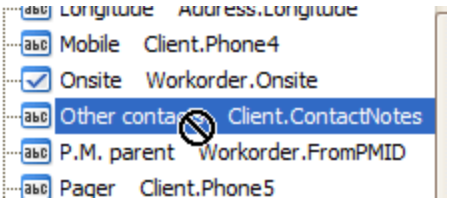
c. Now that we have space, we will drag the Other Contacts datafield onto the design panel where we want to place it.

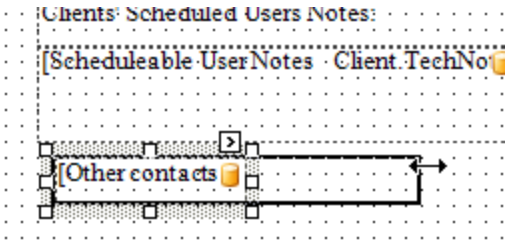
d. Select the Fields tab and expand the WorkorderHeader dataset.



e. Scroll down, drag the Other Contacts datafield onto the design panel where you want to place it



f. Resize the datafield so that it is wider fits under the Scheduled User Notes



g. Preview so that you can now see how this field looks in the report

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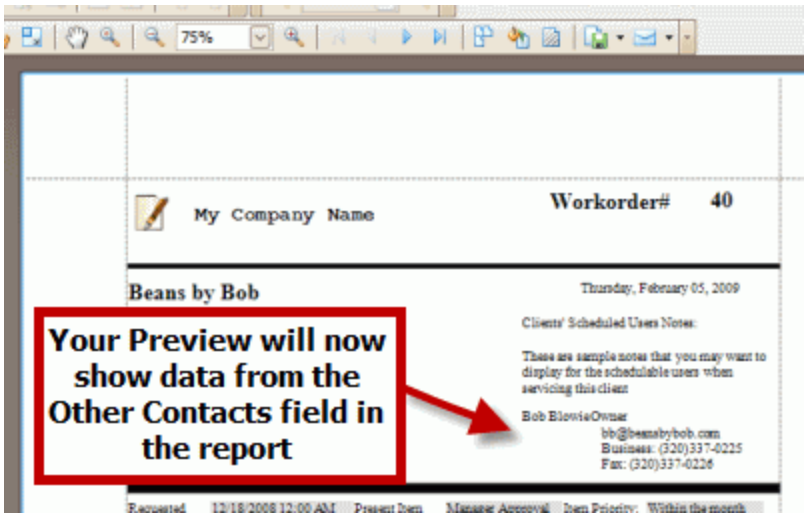
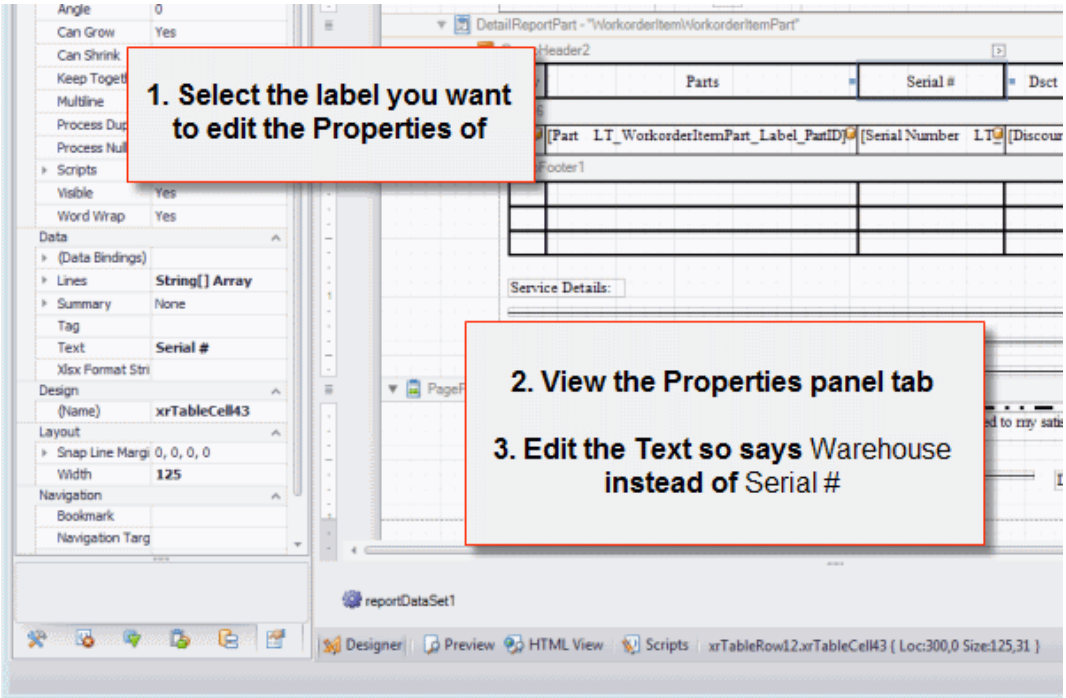


h. Return to the design panel

4. In this tutorial, we want to add the Description field text to display in the part section of the report in case we have entered additional text there.

   a. First we add a cell column into the existing table by:

      - clicking on the table cell xrTableCell48
      - right-click and select Insert -> Column to the right.



   b. Now we need to bind to the Description datafield

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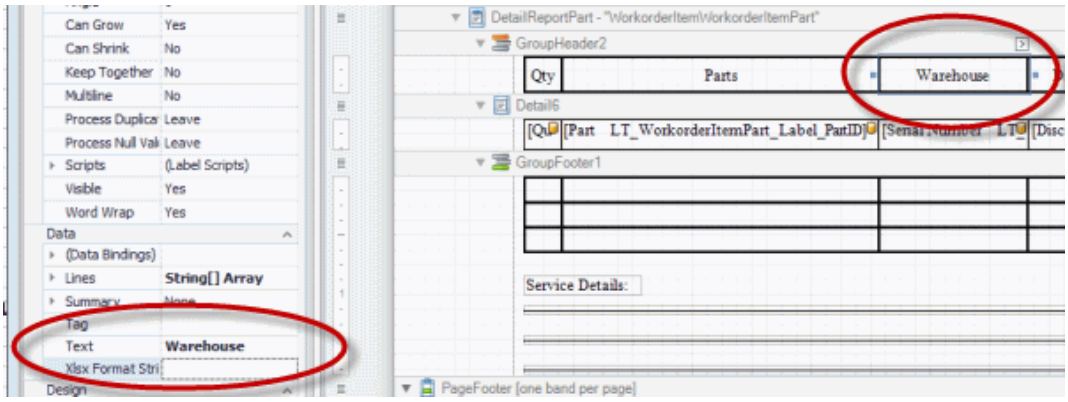
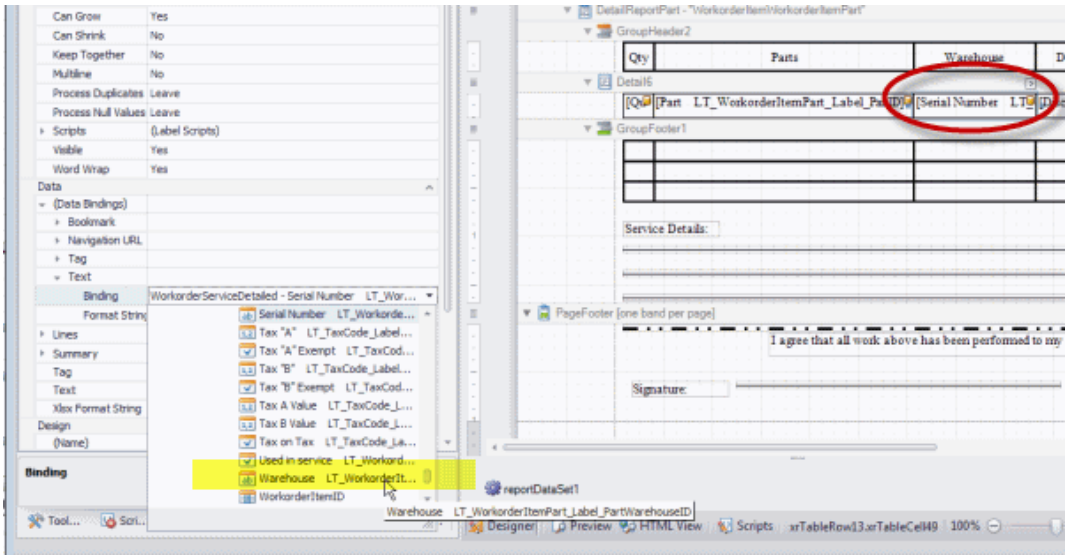
- click on the new cell just created to select it



- now view the Properties tab on the left
- expand the (Data Bindings) property, and the Text Binding property
- drop down the selection



- expand the WorkorderHeader, expand the WorkorderHeaderWorkorderItem, expand the WorkorderItemWorkorderItemPart dataset and select the Description datafield in the WorkorderItemWorkorderItemPart dataset *(you might want to change the width of the Properties tab so that you can fully see the datasets as they expand)*

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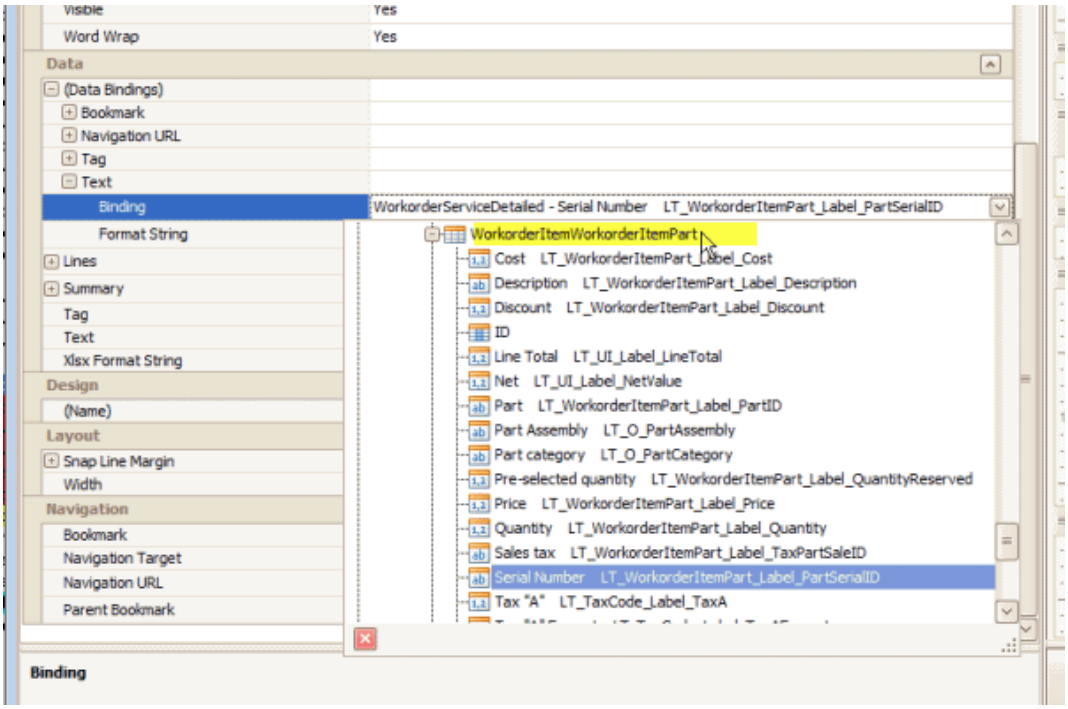

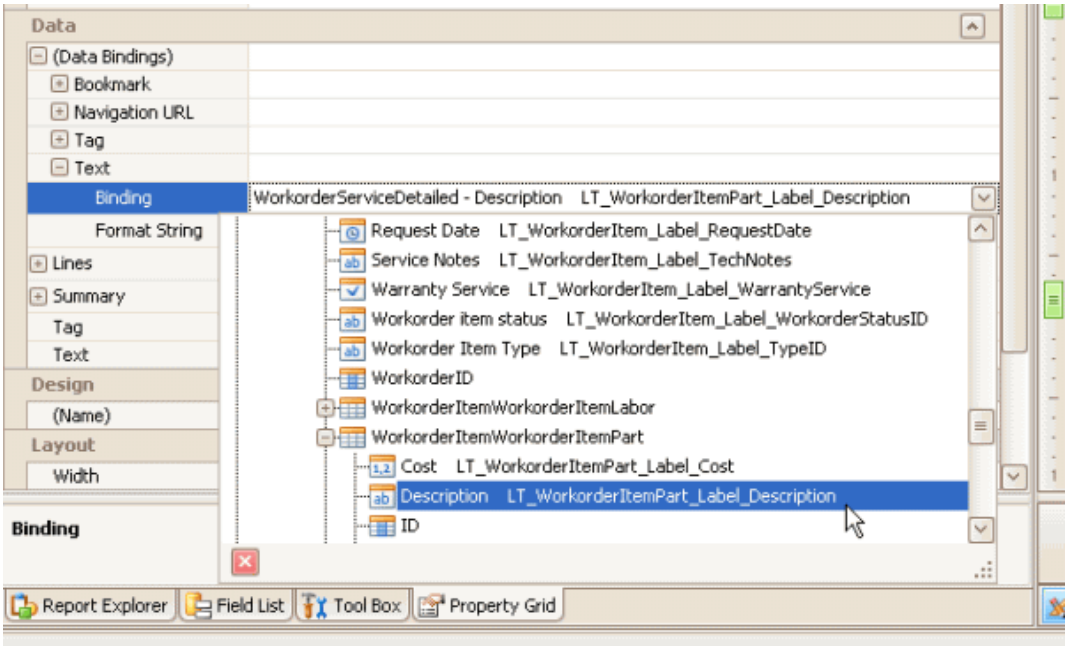

- If you Preview now, you will see that the part section of the report will now display the text of the Description field if entered in any of your service workorders where parts have been selected.

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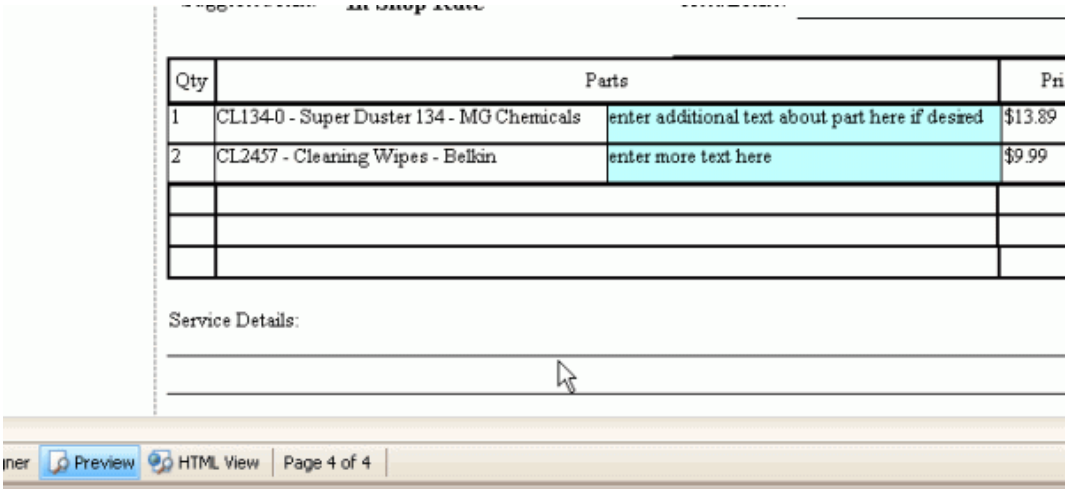
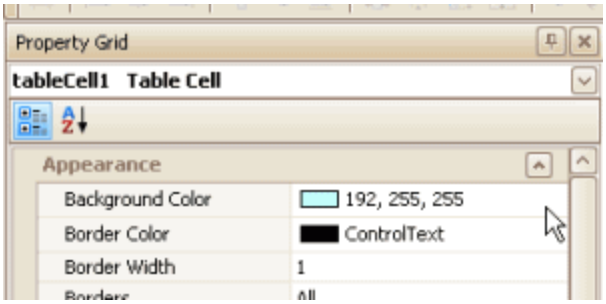
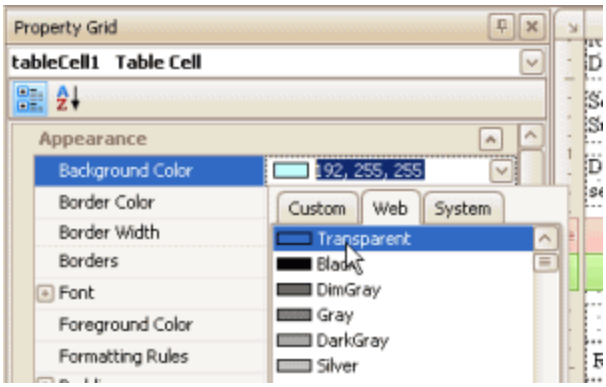


c. Now you would want to change the background color of this newly added control

- with this control field still selected, view its Properties tab
- edit the Background Color property selecting Transparent





- you will see that the cell now is no longer blue

d. And you might want to change the width of this control field. Use your mouse to drag sideways.

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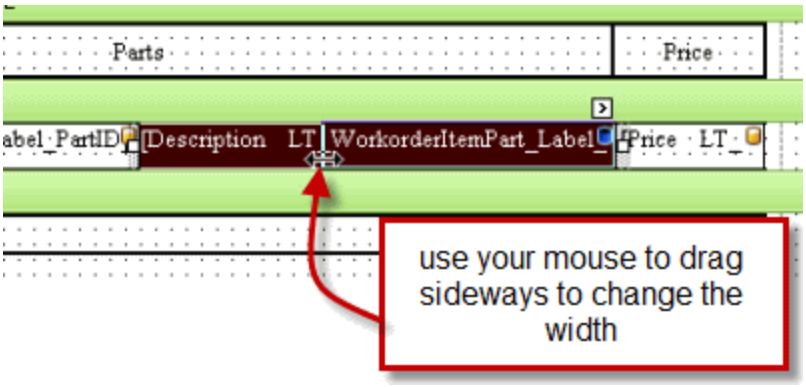
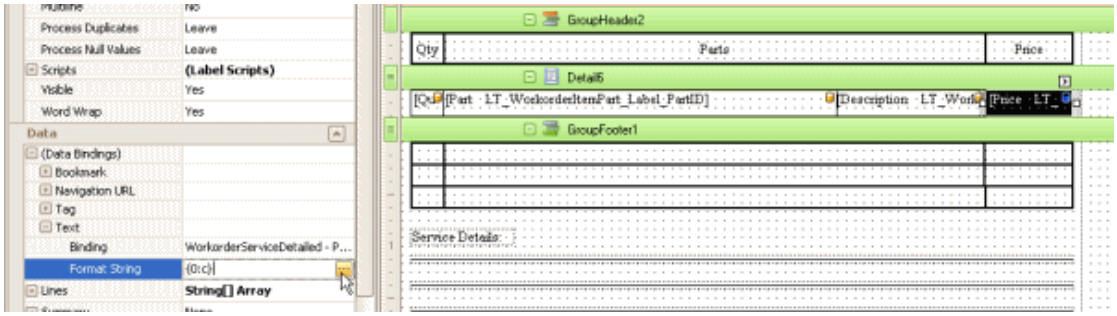
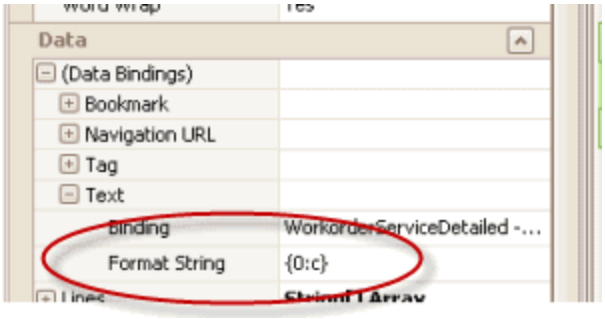


5. Now we want to check and see what the Price datafield is formated for showing.

   a. Select the Price datafield, view the Properties tab for it, and expand the (DataBindings) property -> Text -> Format String



   b. Right now the Format String is using the string {0:c} which tells the report template to use your computer's Regional settings to display the currency symbol



   c. In this tutorial, we want it to be forced to always show as $ regardless of the regional settings of the computer accessing the data, so we click on it to bring up the FormatString editor and select $0.00

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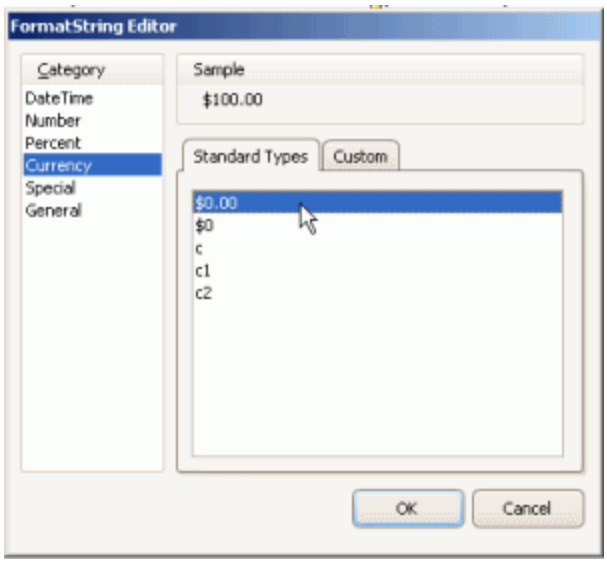

d. Preview so that you can see the results of the changes you have made

6. Save and exit out of the report template

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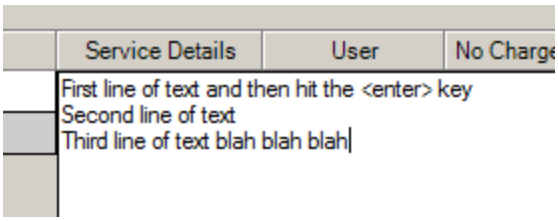
5.18 Display multiline text with carriage returns in reports?

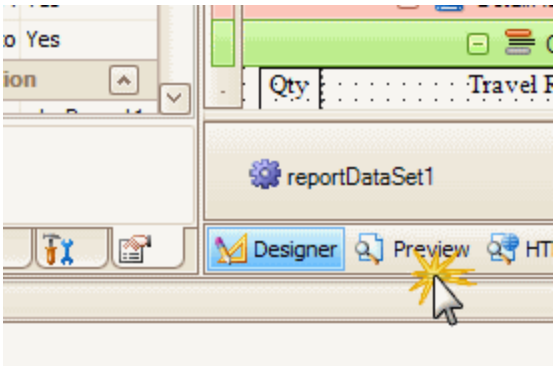
In this tutorial example, we will edit an existing sample report template so that text in a multi line field displays in the report as shown when viewing the workorder itself.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.

1. Open any workorder that is not yet Closed
2. Enter the following text with carriage returns into the Labor's Service Details field so that it looks similar to the screenshot below with three distinct lines of text



3. Save the workorder
4. Now select the Print menu option, hold down the SHIFT key on your keyboard and select the Sample Detailed Service Workorder with Grand Total report template to open it in the Report Designer
5. Select Preview in the bottom of the report designer so that you can see what the report looks like originally



6. Note that the Service Details is not showing in the report preview as it did in the workorder itself - there are no carriage returns, all three lines are merged together without multilines

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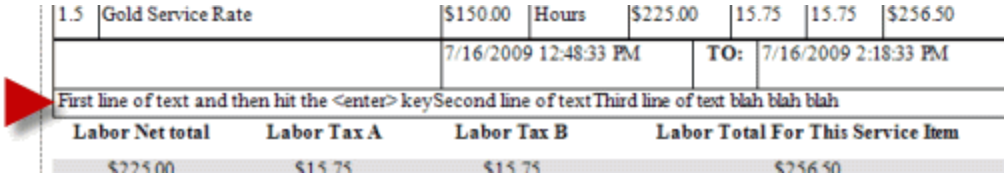
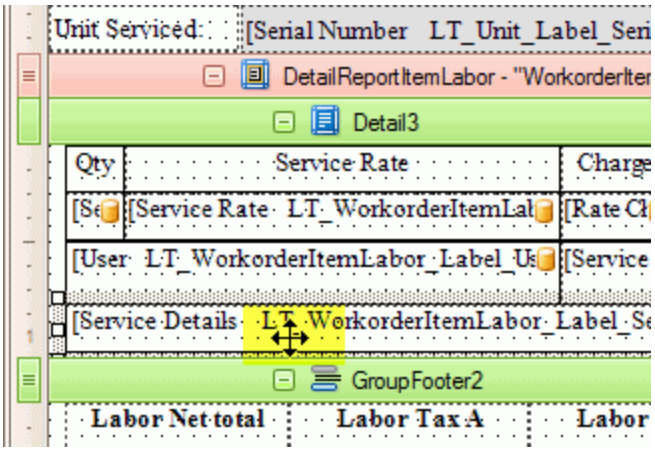


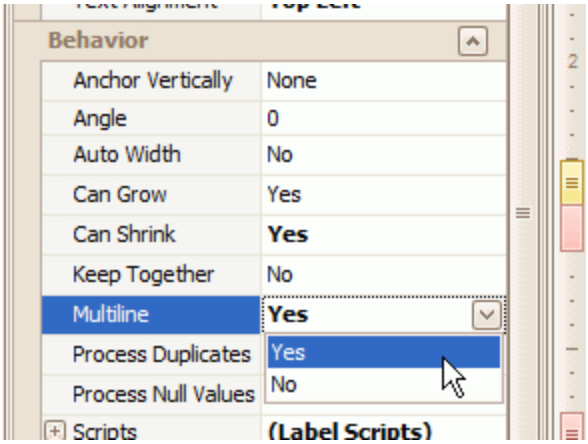
7. Return to the Designer

8. Use your mouse to click on the Service Details datafield in the design panel



9. View the Properties tab for this datafield

10. Edit the Behaviour property MultiLine from No to Yes



11. Now click on Preview again

12. Now you will see that the Service Notes field displays just as you entered it in the workorder

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1.5	Gold Service Rate	$150.0
		7/16/2
First line of text and then hit the <enter> key Second line of text Third line of text blah blah blah		
Labor Net total	**Labor Tax A**	**Labo**

13. Save your report template

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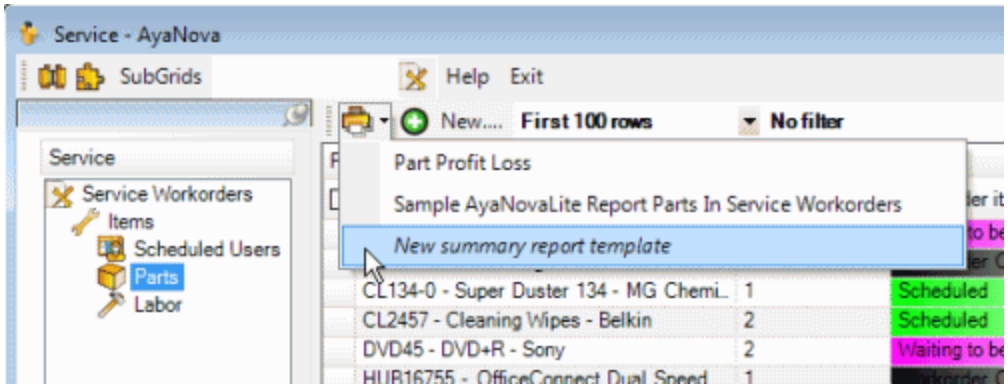
5.19 Create a report template using the Wizard

In this tutorial example, we will create a new *Summary report template* using the Wizard for the Parts grid in the Service navigation pane.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- NOTE**:** There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders (or PM or Quotes) because the Wizard is not able to access the many sub-sets of data that a detailed workorder (or quote or PM etc) report template has.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

In this tutorial, we want a report template to show parts used in service grouped by the client the workorder was for.

1. Select the Parts grid in the Service navigation pane
   a. Select the Print menu option
   b. Select the New summary report template to open the internal report designer for a new report template



2. Enter in the report template name **Parts Grouped By Client**

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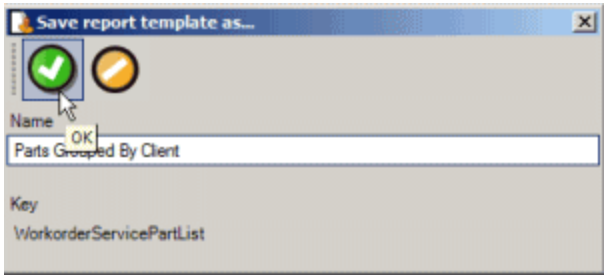
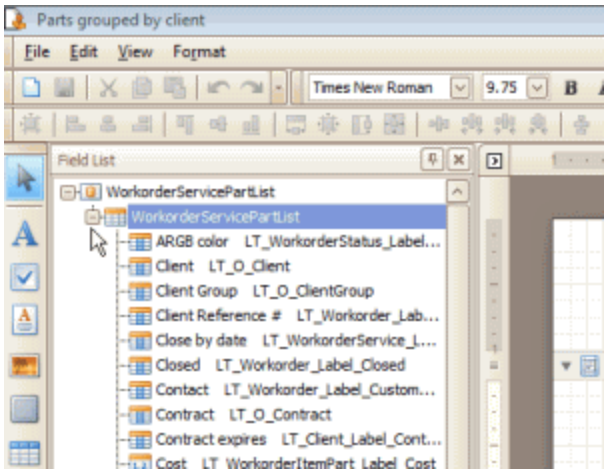
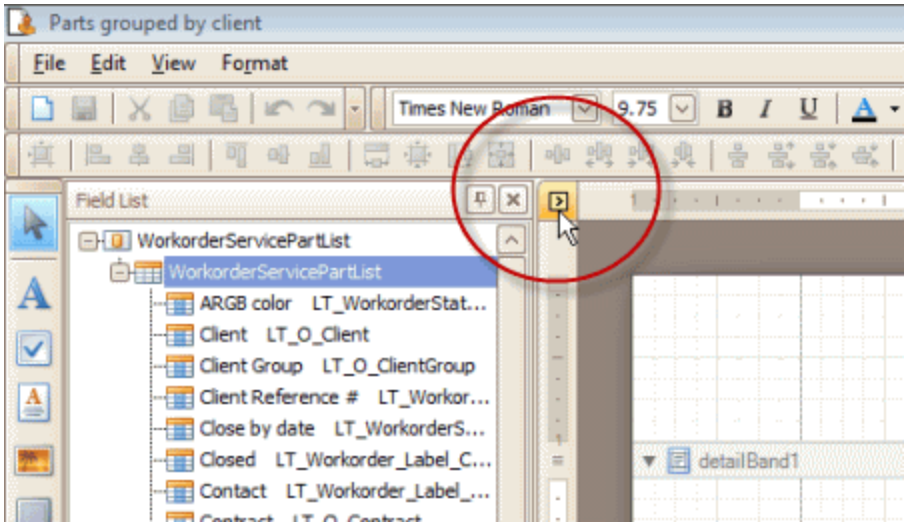


3. The internal report designer opens for a new report template

4. To see what data fields are available with this report template, select the Fields tab, and expand the dataset. This is just to show you where else you can drag the datafields from in addition to using the Wizard



5. In the design panel, in the upper left hand corner, click on the for a list of report tasks available for this report template, and click on the **Design in Report Wizard....**



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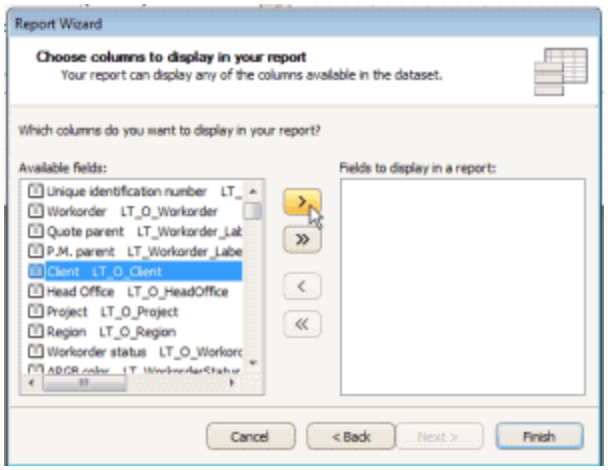
6. The Wizard defaults to Standard Report selected. Select Next >

7. Now we will select the columns we want to display in the report.

8. Select Client and move this column to the right.



9. Do the same for Workorder, Service Date, Part, and Quantity. Then select Next>

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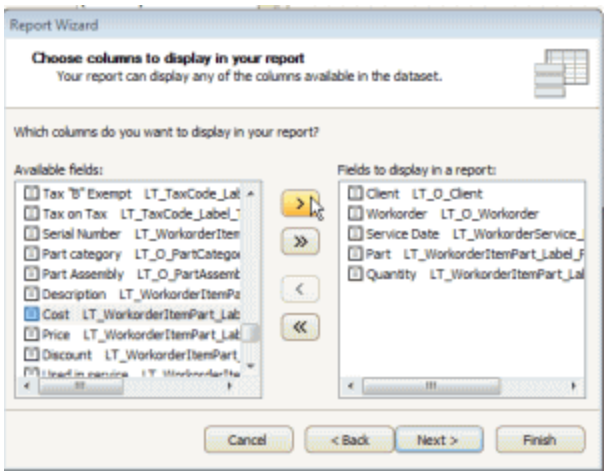
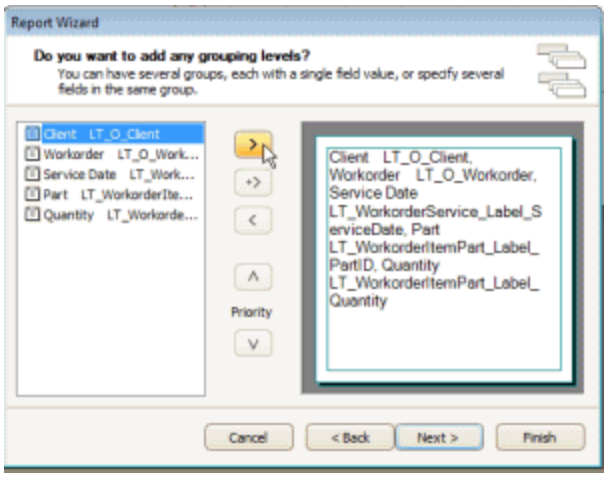
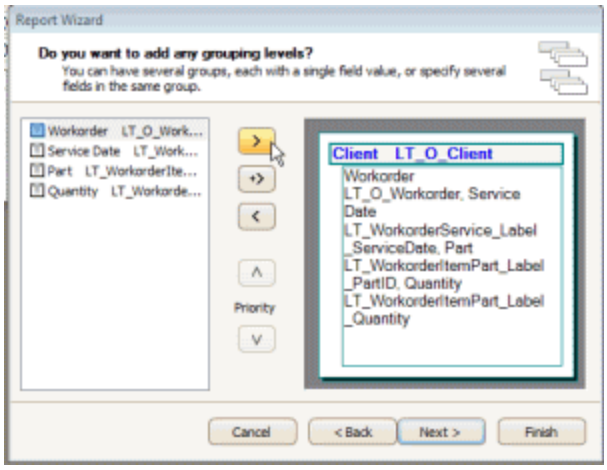


10. The next screen of the Wizard is if you wish to group by any of the selected columns. We want to group by the Client, so select Client and then Next>





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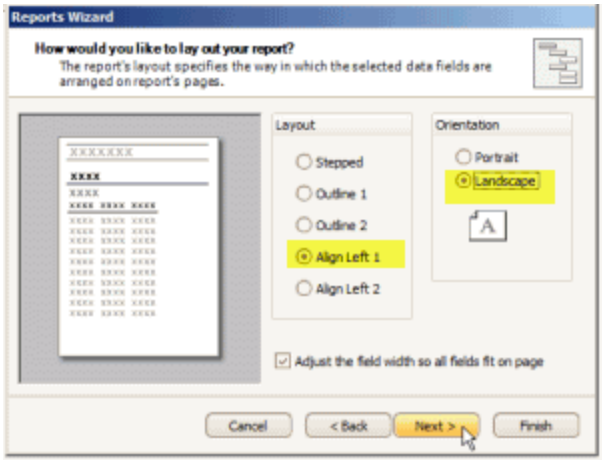
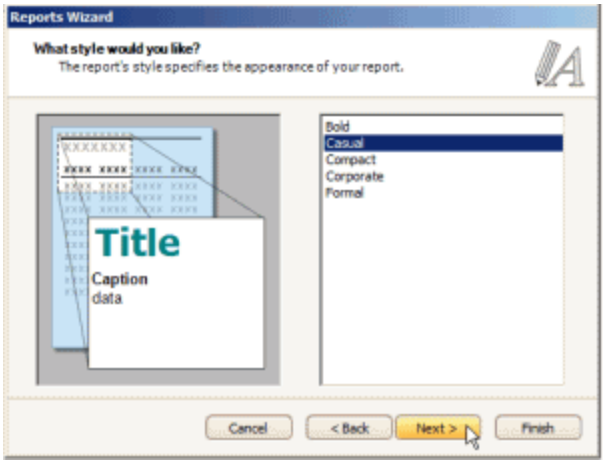
11. We will ignore summary values at this time. We do encourage you to try out different scenarios on your own. Select Next>

12. Select **Align Left 1** and **Landscape** for the layout, and select Next>



13. Select Style of Causal. Select Next >



14. Enter a title of **Parts Grouped By The Client**. Select Finish.

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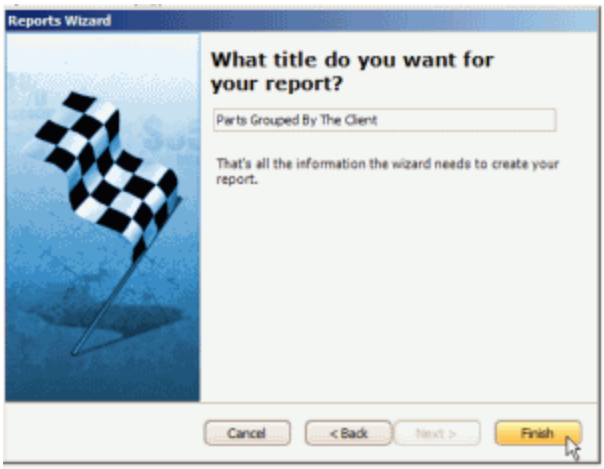

15. The Wizard takes the entered information, and creates a report template. Select Preview link at the bottom to see what the report would look like at this stage.

16. As you can see, the label names for data are using the internal data name that you will want to edit. Also you might want to change font or sizing of the fields

17. Select the Designer link at the bottom to return to the Design Panel.

18. Edit the labels for the group headings

    a. Select the label control that presently has the text **Client O.Client** and edit it's Text property so that it is just labeled **Client**

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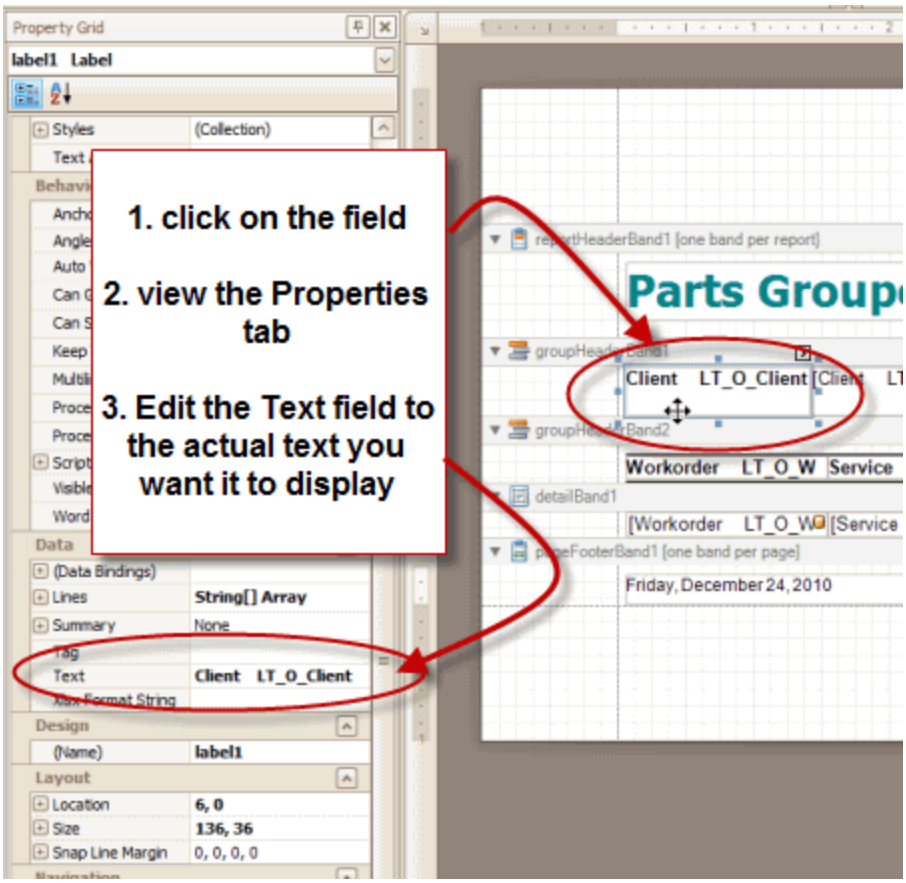
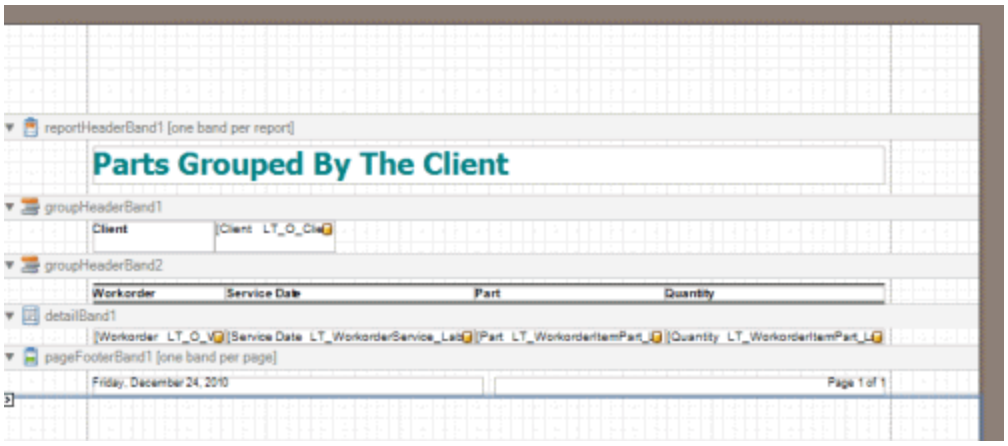


b. Do the same for the other labels such as those that are presently labeled Workorder O.Workorder etc so that the labels show with the desired text



19. There is not enough width given to the Part field, so use your mouse to click and change the width of the Quantity label and the Part label and the Service Date for both the group header and for the detail

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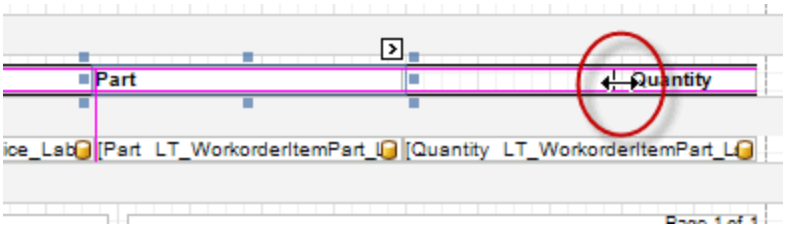
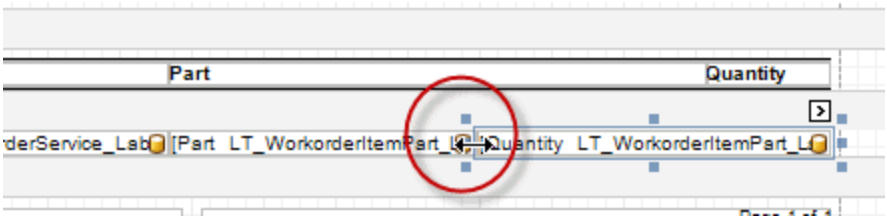
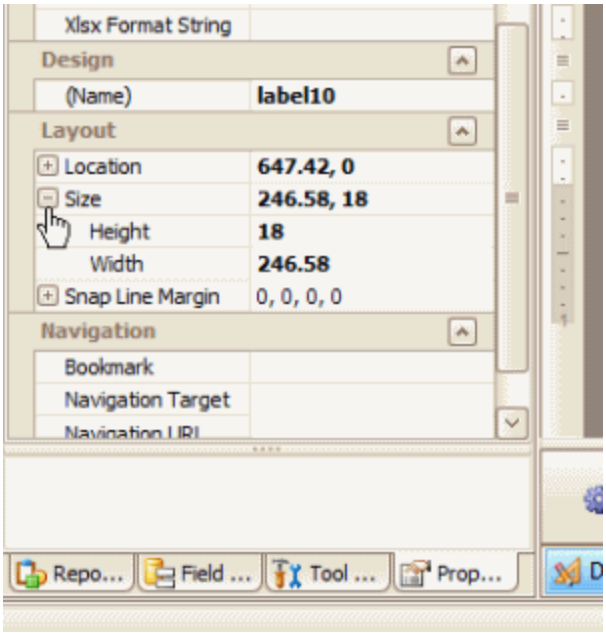




a. **Preview** so you can see how it now looks

b. Change the width of other fields as you want such as the Client datafield to accommodate client's with long names

c. You can also use the Properties tab to change the width etc. Select the field you want to edit, and then adjust the Layout properties



20. Edit the font of fields in a similar fashion - select the field in the design panel, view that field's Properties, and edit from the Appearance properties

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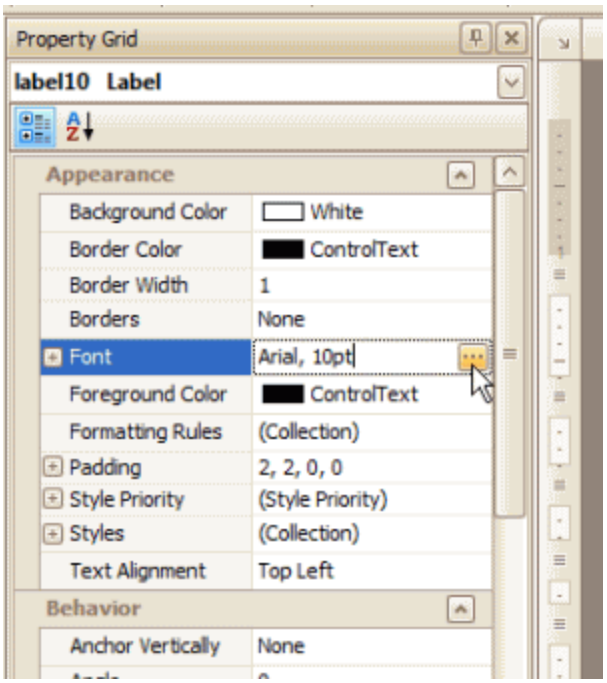

21. Save the report template once finished. It will now appear for selection in the Part's grid of the Service navigation pane.

As As with any report template, if you only want specific records to display on the report when printed, first filter the grid so that it only shows the records you want to report off of. Also see [How do I filter a grid and print a report for the records that show?]

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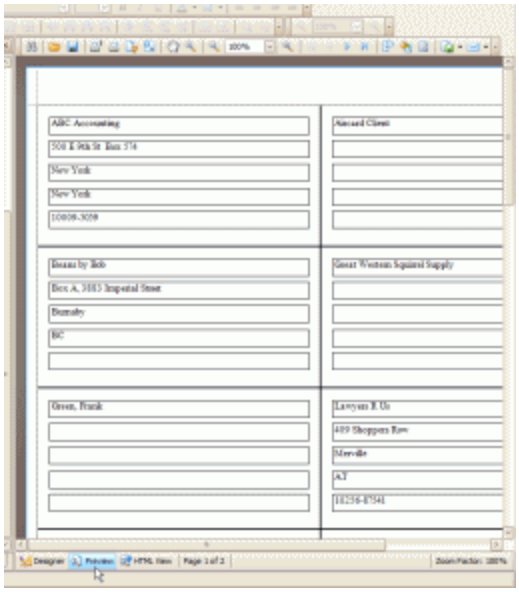
5.20 Create a label report template using the Wizard



In this tutorial example, we will create a new **label** report template using the Wizard for the Clients grid.

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- You can only have fields display in a report template if they are available from that report template's dataset - you can not add additional datafields to a dataset. For example, you can not have additional fields from the Unit entry screen display on a report from the Service Workorders grid except for those that are in the Service Workorder report template dataset.
- NOTE**:** There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders (or PM or Quotes) because the Wizard is not able to access the many sub-sets of data that a detailed workorder (or quote or PM etc) report template has. The detailed report template for the Clients grid is an exception to this rule.
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

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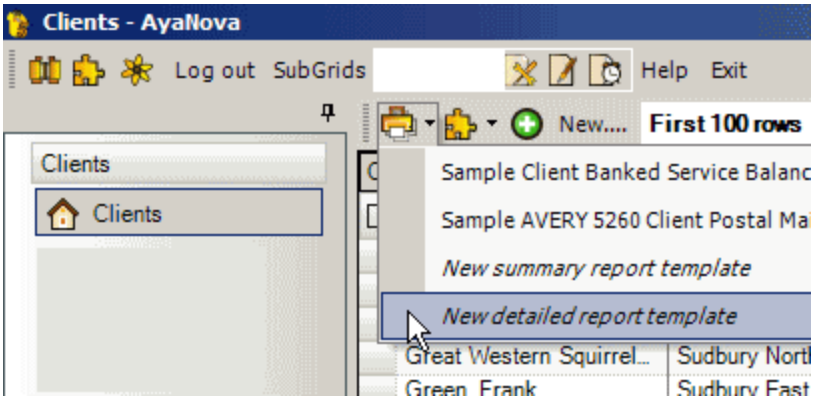
1. View the Clients grid and select the Print menu option

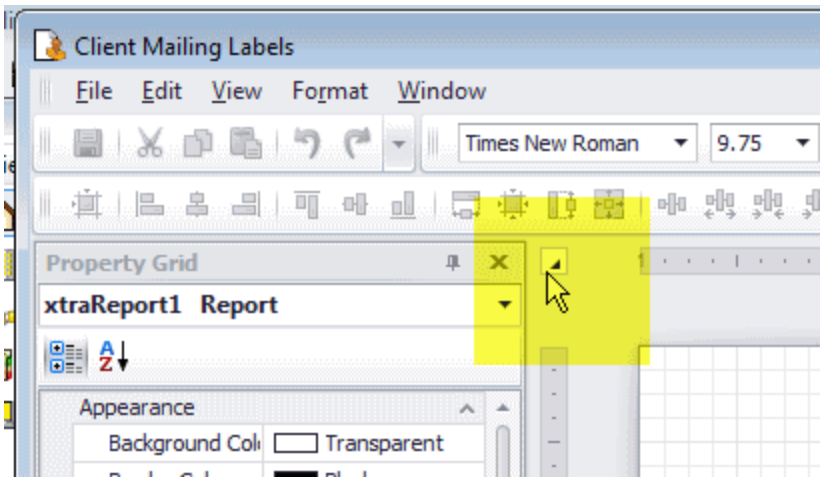
2. Select the *New detailed report template* to open the internal report designer for a new detailed report template

   a. As the Summary dataset contains the same column fields that are displaying on the grid, we know that the address fields displaying are the physical address, and we need the Postal address for mailing which are only accessible via the Detailed report template dataset.



3. Enter in the report template name **Client Mailing Labels**

4. In the design panel, in the upper left hand corner, click on the for a list of report tasks available for this report template, and click on the **Design in Report Wizard....**



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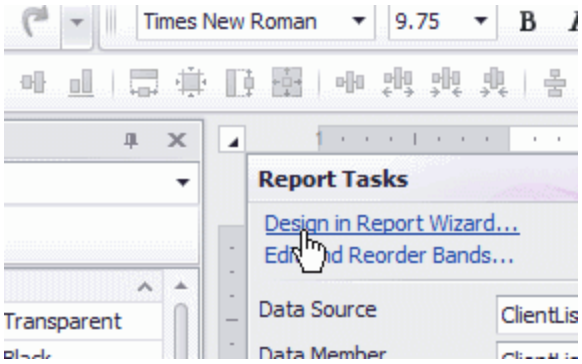
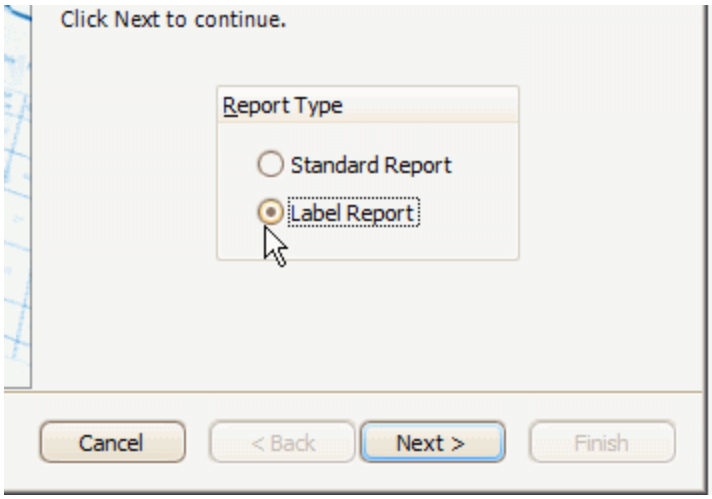


5. Select Label Report and select Next >



The Wizard comes standard with a large number of pre-defined Label Products and Product Numbers with the dimensions provided by the label product manufacturer. In our example, we want to print to Avery 2163 Address/Shipping labels, so that is what we will select.

6. Select the Label Product **Avery Standard**, and the Product Number **2163 Address / Shipping** and select Next >

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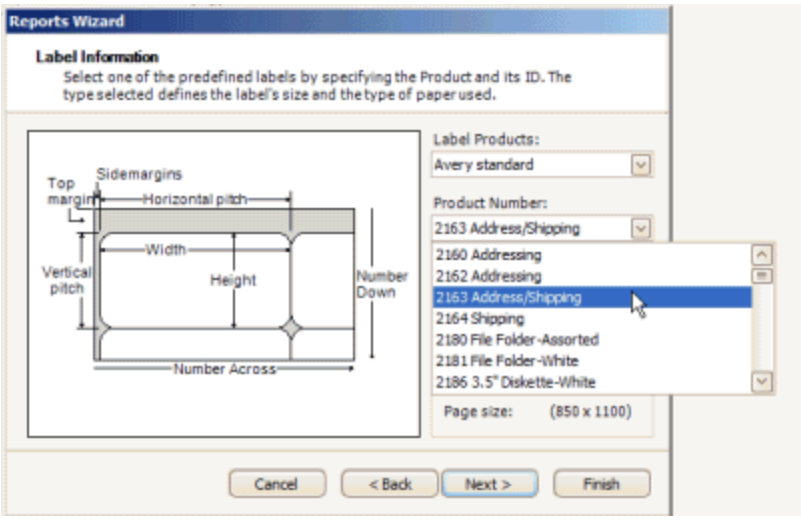
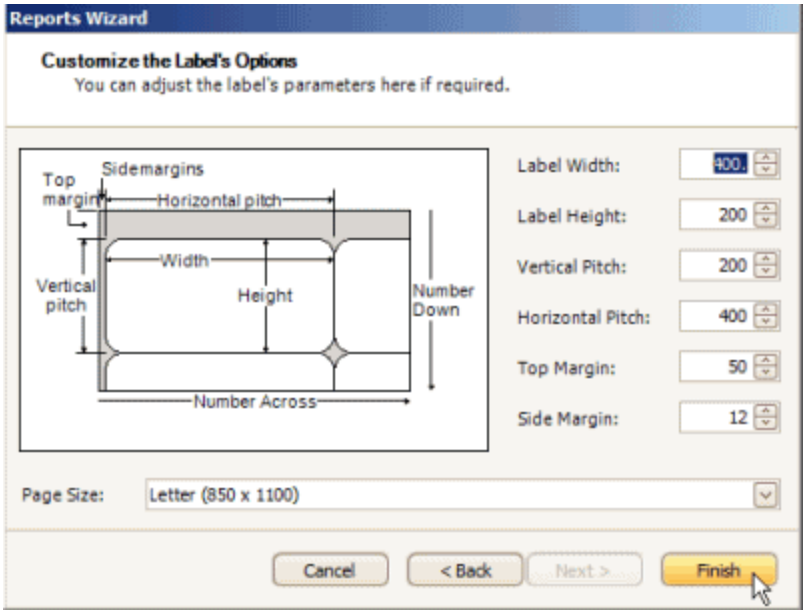


7. The next screen appears if you wish to alter the manufacturer provided dimensions for this product and number. You may want to do this due if issues with your printer, or you may do this because you have selected a product that is similar to your product but not actually listed for selection – here is where you would make any dimension modifications



8. Select Finish

Now we will drag and drop and resize the data control fields we want to display for this label

9. Select the **Fields** tab and expand the **ClientListDetailed** dataset so you can see what fields are available.

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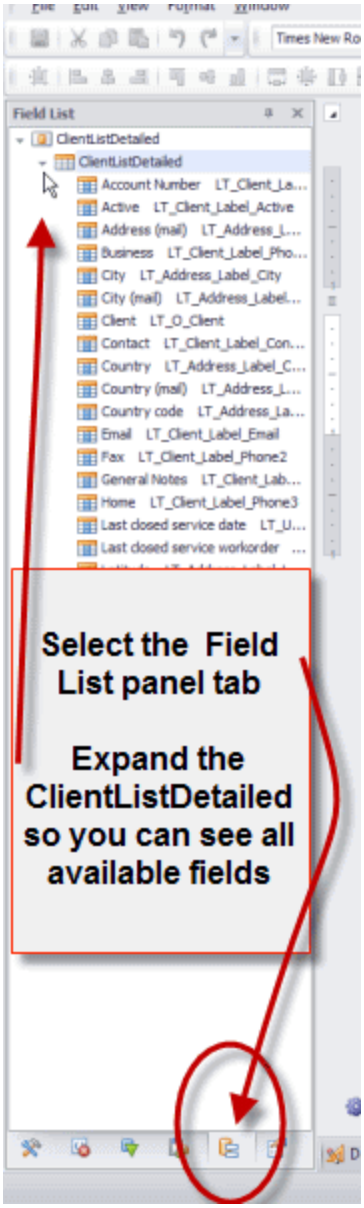
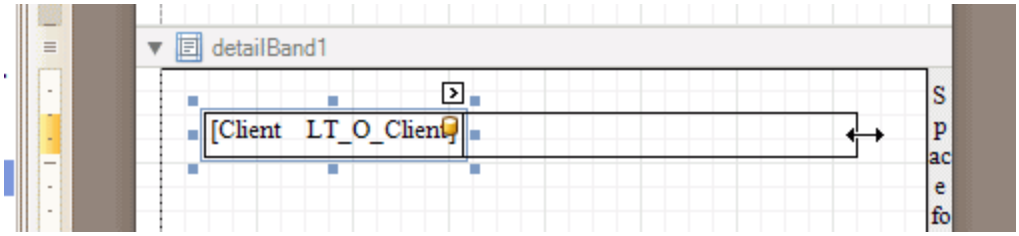


10. Select the **Client LT_O_Client** data control (Client is the localized text, and LT_O_Client is the internal Key referring ot the datafield) and drag it onto the Design Panel. Edit the width of the data control so its width is at least 350



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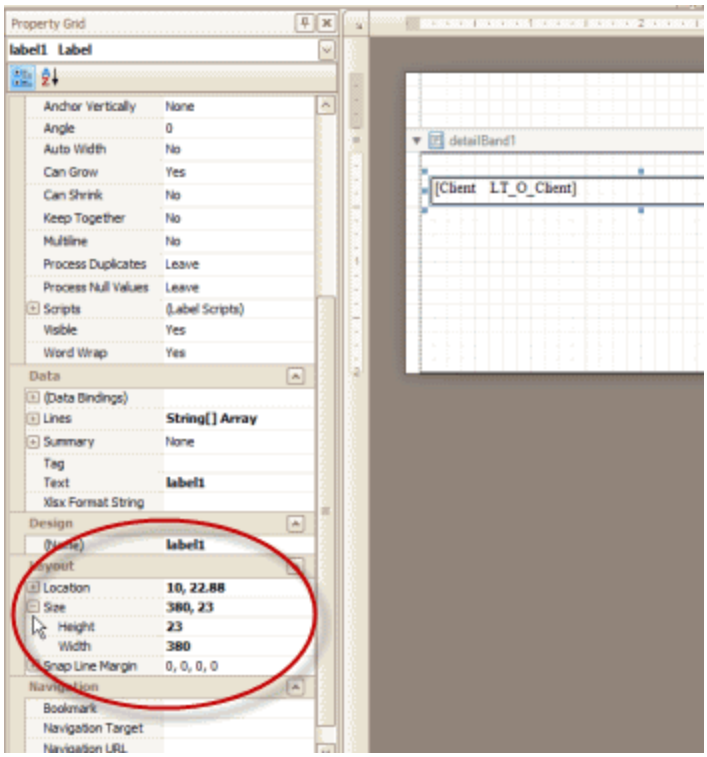
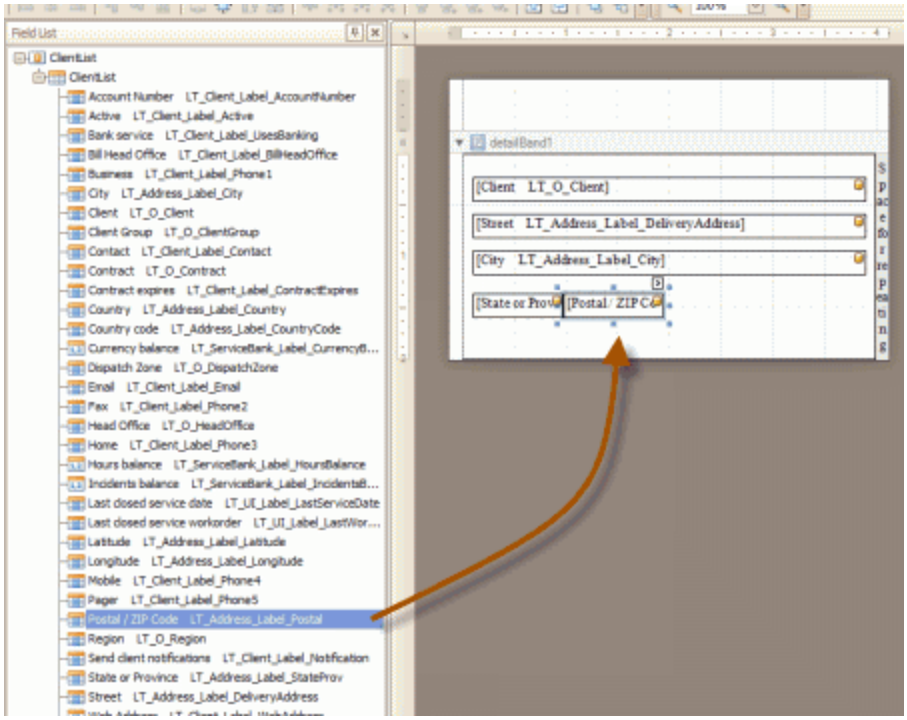
You can also edit the width and height of fields by editing the Layout properties of the field selected on the design panel



11. Drag to the design panel the address data fields



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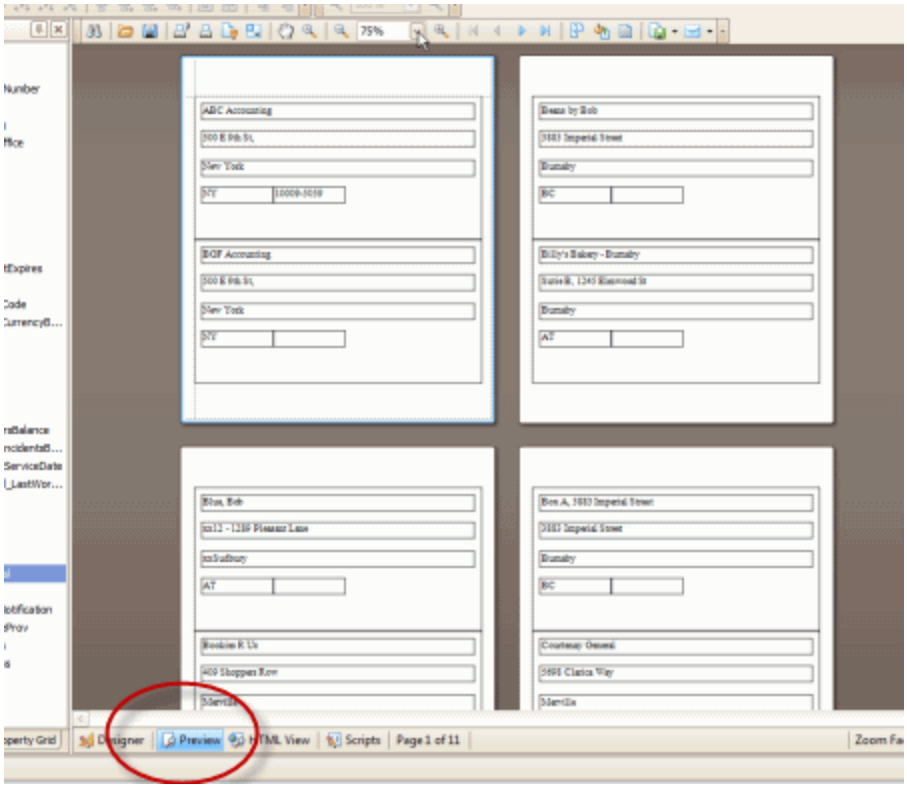
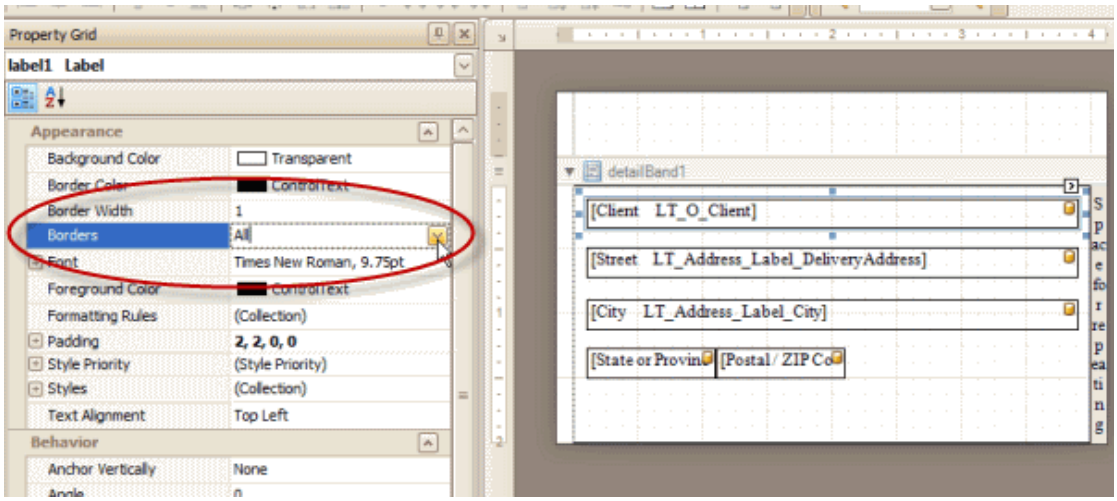
12. If we select Preview from the bottom of the Design panel, we would see that right now each of the control fields has a border.



13. So lets remove the borders from showing. Click on the Designer link at the bottom so that we view the design panel again.

14. Click on the **Client** datafield control in the Design Panel, and then select the **Properties** tab.

15. You will note that the property **Borders** is presently set to **All**



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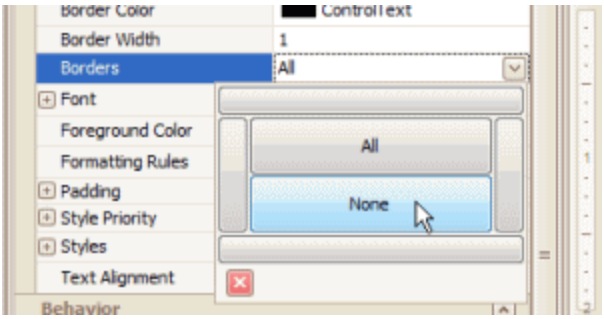
16. Click on the property for Borders and change it to None (you may have to click elsewhere after selecting None for it to be applied)



17. Preview and you will see that the border is now no longer showing around the Client

18. Perform the same for the other datafield controls (i.e. Address, City, etc) in the Design Panel

19. Select Preview link to see what it will look like

20. Congratulations - you have created your first label report in AyaNova. Go on and try out different fields, properties and more.

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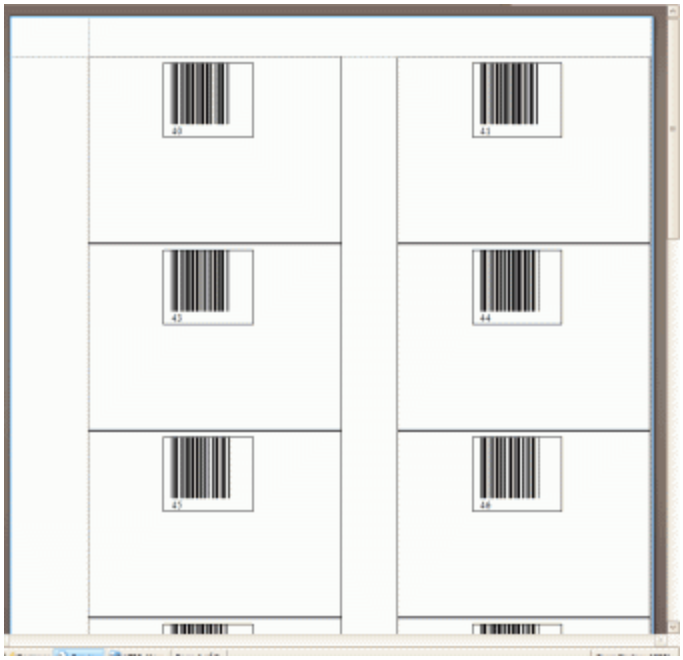
5.21 Use Barcodes in a report template



In this tutorial example, we will create a new report template that makes use of Barcodes

- It is recommended that you review the Report Templates Help section before proceeding for an overview of the Report Designer.
- There is not an option to use the internal report designer's Wizard to create a report template for *Detailed* datasets such as a *Detailed report template* for Workorders because the Wizard is not able to access the many sub-sets of data that a workorder have.
- We recommend that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further
- NOTE: Due to the large number of different types of barcodes, as well as barcode hardware, we have not tested this feature with every barcode or barcode device. We provide the following tutorial as a tutorial only, consult your barcode reader vendor and documentation for exact settings to use.

1. Select the Service Workorders grid within the Service navigation pane

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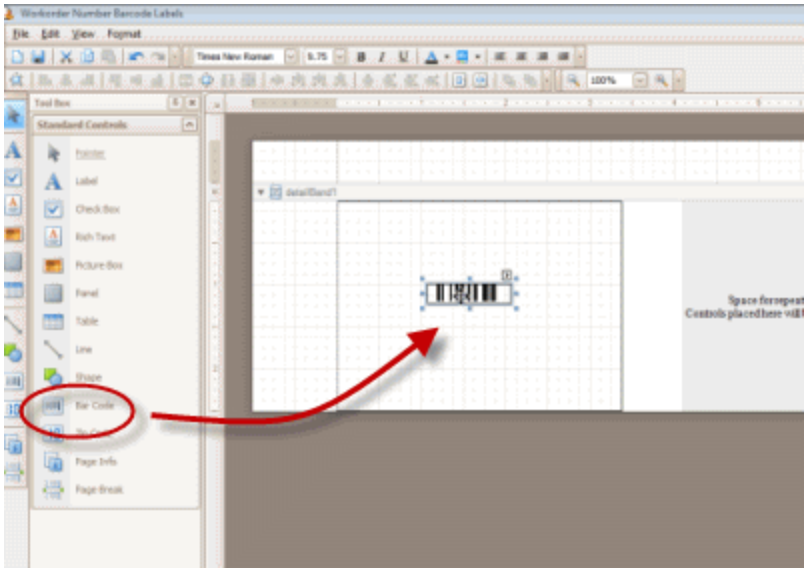
2. Select the ***New Summary report template*** from the Print drop down menu

3. Enter in a report name of Workorder Number Barcode Labels

4. Within the report designer, select the **Design in Report Wizard**, select **Avery Standard**, select **12-295 Laser tags – White**, select Finish

    a) Refer to the previous tutorial on creating a Label report template if needed.

5. Select the Toolbox tab, select **BarCode** control field, and drag onto the design



6. Adjust the barcode control size and height and location. You can use your mouse to drag and resize, or edit the Properties for **Size** and **Location** layout.

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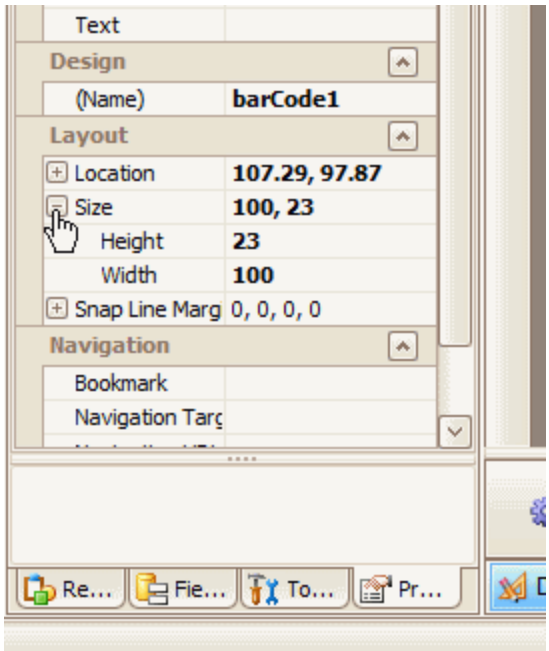

7. The basic properties of the barcode need to be set to specify its type and look.

    i. You **must** specify the BarCode.Symbology property (codetype) which returns an object that corresponds to the particular barcode's symbology type and contains all the properties required by this type.

    ii. If needed, also set the BarCode.Module and BarCode.Padding properties to change a barcode's appearance.

8. In this tutorial, we will select the Symbology property of Code11, refer to your barcode scanner and vendor for the proper symbology supported by your equipment and needs

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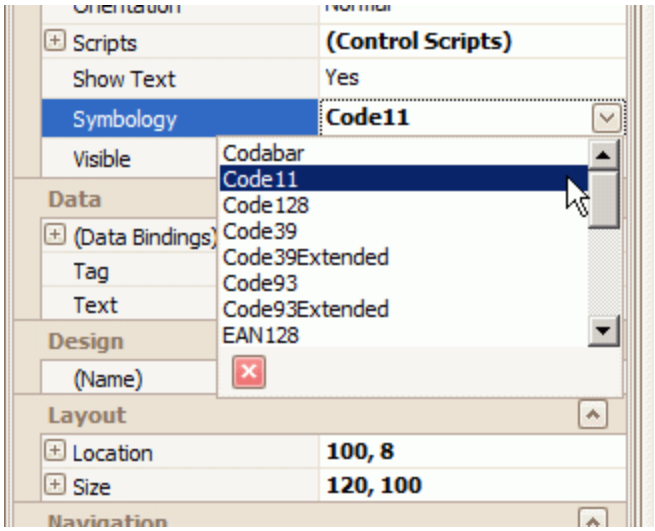
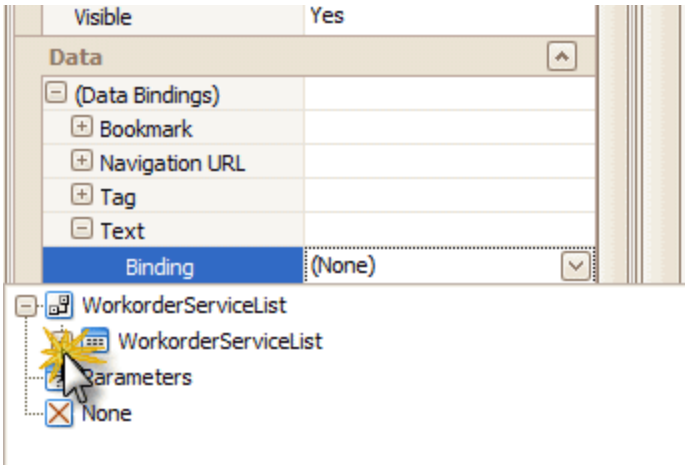


9. Now we will bind the data field for the workorder number to this barcode control

   iii. With the barcode on the panel still selected, expand the DataBinding property field -> expand the Text property field under the DataBinding field

   iv. Drop down the selection for the Binding field

   v. Expand the WorkorderServiceList



   vi. Scroll down and select the Workorder datafield

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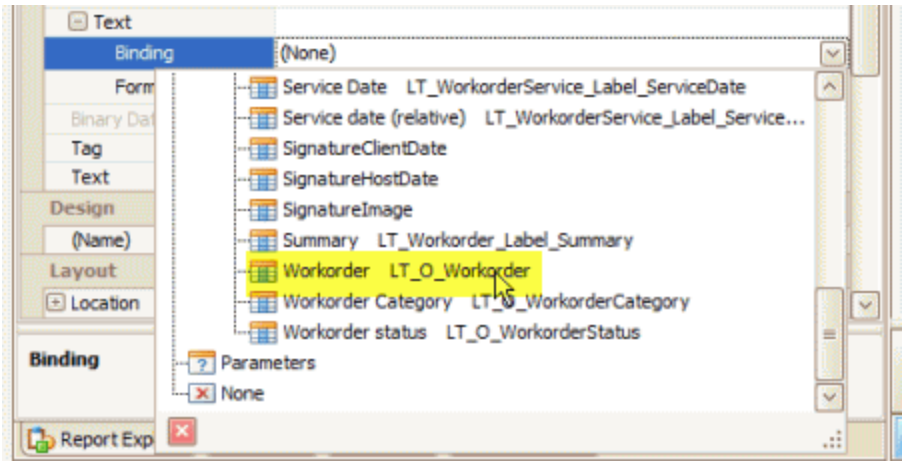
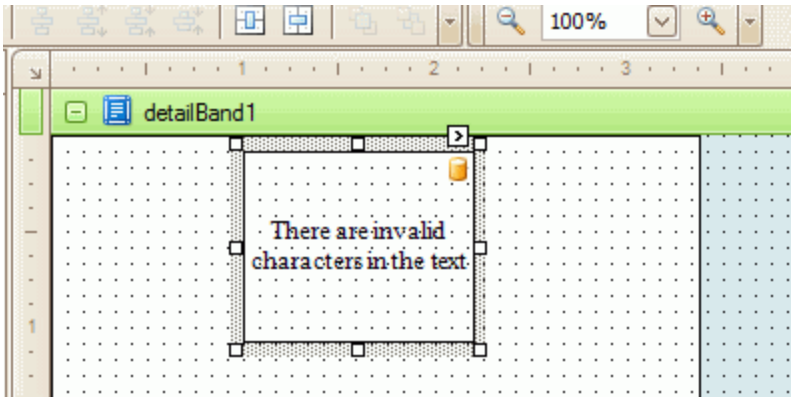


10. Note the barcode on the panel may show "there are invalid characters in the text" - if you click on Preview you will see it actually displays the barcode with the workorder number or not.



11. We will now also drag onto the design panel the additional data control fields such as the Client, Workorder Status, and Summary – and resize them so useful.

12. Select the Preview link to preview what the report will look like at this point.

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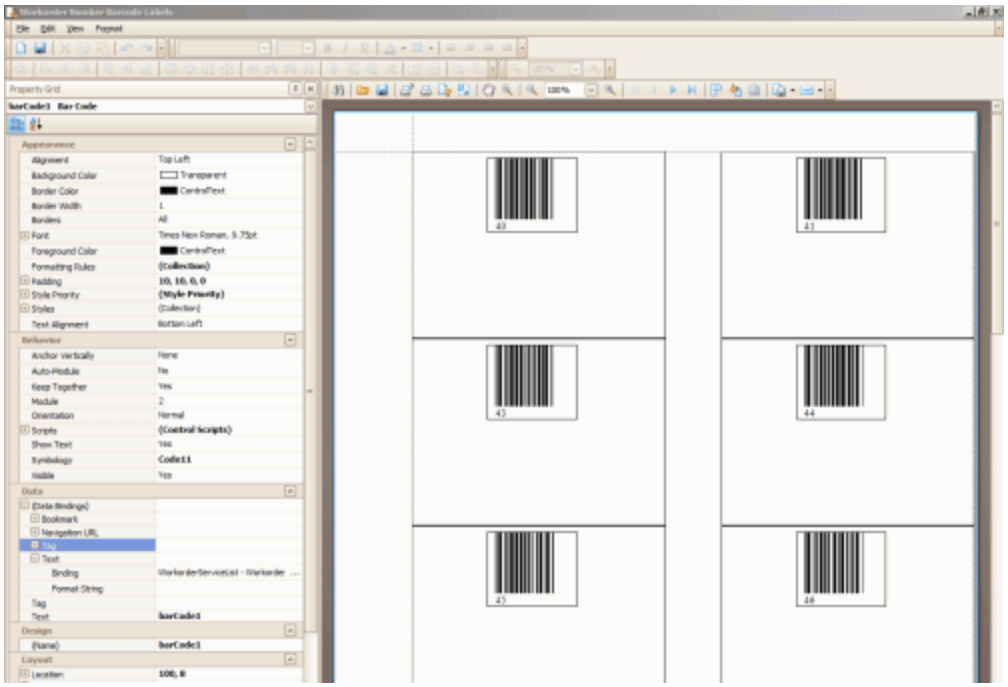


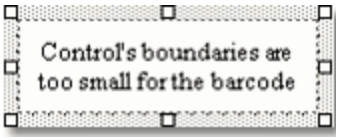
13. Drag and drop datafields and edit as desired.

14. Close and save the report

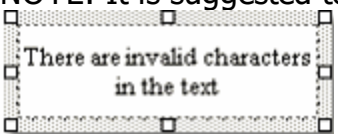
When previewing, if instead of a barcode there is a message, that would indicate you need to adjust depending on the message.

Errors that can occur with barcodes in reports

When adjusting a barcode some errors can occur due to incorrect parameters being specified. For instance, if a barcode control is too small to represent the barcode type specified, the following error message will be shown in place of the barcode.



If there any characters in the barcode's text that are not allowed by this barcode type, then the following exception will be shown. NOTE: It is suggested to check Preview first though, as it may just be cosmetic.



Also, it's necessary to ensure that the text characters meet the text format rules required by the barcode's type. When these characters do not satisfy the required text formatting then the following message will be shown.

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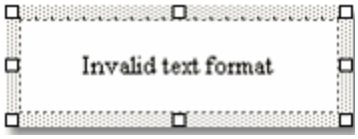

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5.22 Calculate an Automatic Summary in a report template

The internal XtraReports designer supports automatic calculation of summary functions (totals, maximum, minimum, averages, etc.) only for XRLabel controls (or its descendants) which are bound to data.

A full set of the summary functions that can be automatically calculated with **XtraReports** is listed in the SummaryFunc enumeration. Note also, that a summary value can be correctly calculated only if a label is bound to either numeric or date/time data.

All the summary options available are listed by the XRSummary object which is returned via the label's XRLabel.Summary property.

To calculate an automatic summary for a label you should be aware of the following:

- A summary is calculated only if data is bound to the XRControl.Text property of a label.
- An automatic summary can be calculated either for all the values in a particular group or the entire report.
- A label should be located in the report band which corresponds to the values it will be calculated for.
- This means that if a summary is calculated for a group, then the label should be located either in that group's header or footer band.
- At design time you can also use the Summary Editor to set all the summary options in one place.

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- Since the summary value is calculated after the XRControl.BeforePrint event has been raised, the summary value can't be accessed from within the BeforePrint event. Use the XRSummary.GetResult method to get the summary's value, or handle the XRLabel.SummaryCalculated event to get the summary value calculated and perform any additional actions required after the automatic summary value has been calculated.

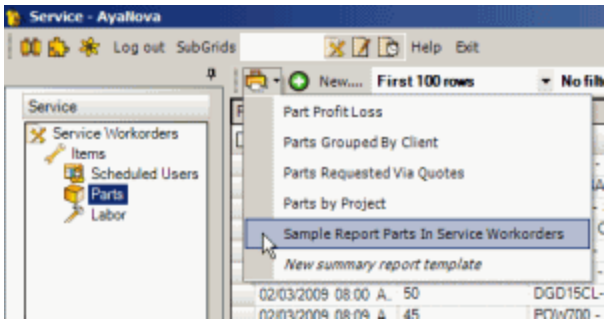
- It is suggested that you open up the existing sample report templates that come with AyaNova to see how they are designed, as well as check out the answers to questions about report template design in the AyaNova Support Forum and additional sample report templates there that you can download, use as is or customize further

In this tutorial we will look at an existing sample report template to view use of an automatic summary, and go through the steps to create an automatic summary.

It is recommended that you review the Report Templates Help sections before proceeding for an overview of the Report Designer.

1. Select the Parts sub-grid within the Service navigation pane

2. Drop down the Print menu option, hold down the SHIFT key on your keyboard, and select the report template Sample Report Parts In Service Workorders



3. Select **Preview** at the bottom of the design panel to see what results print before modification.

4. This sample report

   - Groups the part

   - Lists the Quantity of that part for that workorder

   - Totals all Quantities of that part for all workorders

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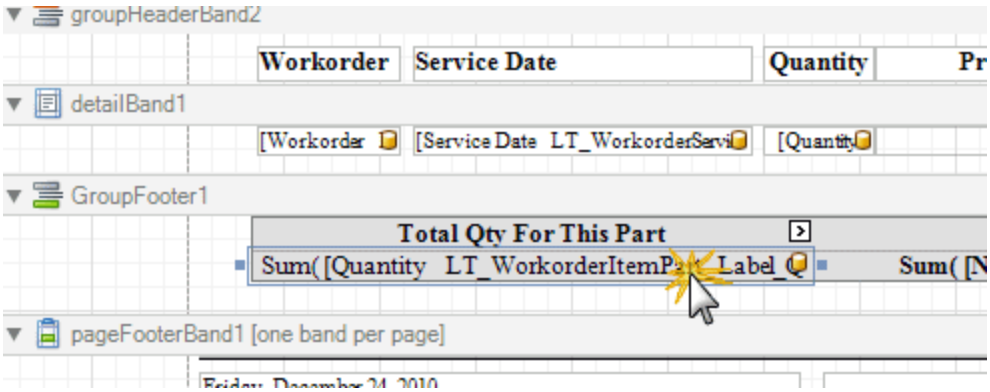
- Lists the Net of that part for that workorder
- And totals all of the Net for that part for all workorders

5. In the Design Panel, select the Sum([Quantity]) datafield control



6. Select the Properties tab, select within the Summary field, and select the browse icon to open the Summary Editor window

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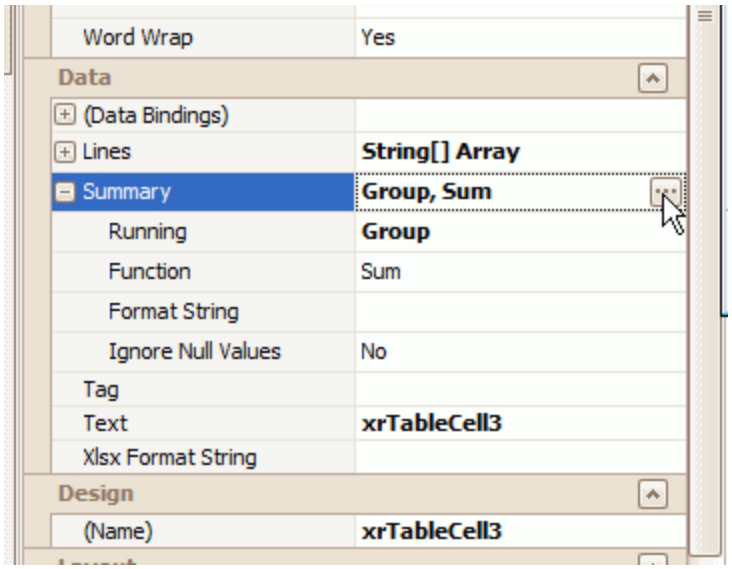
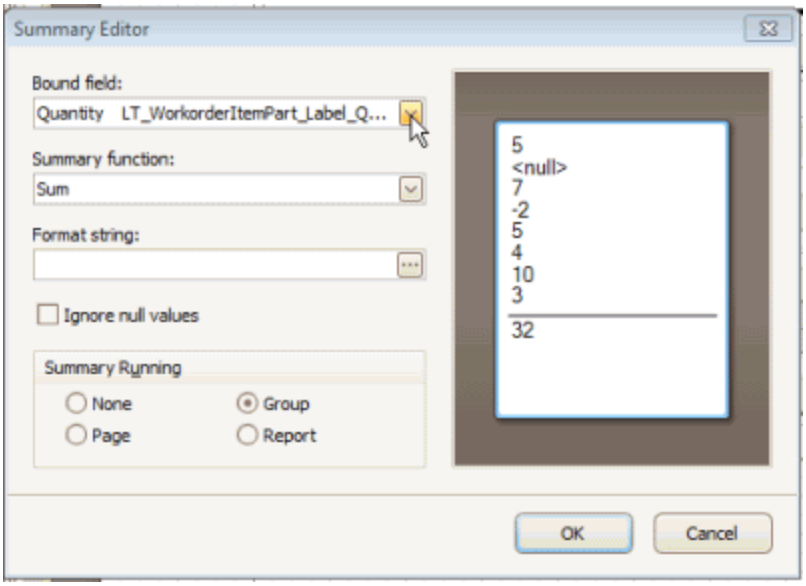


7. You will note that the bound field is to the Quantity field and that the Summary function selected is Sum and that the Summary Running is Group



   a. What this means is the Quantity field is summed up for what is set as the group - in this case, for each part as that is what this report is grouped by.

   b. Note that there are other Summary functions available, like Avg (average), Max (maximum), Min (minimum) and so on.

   c. Cancel out of this Summary Editor

8. Now we are going to remove that present datafield, and replace it again so you can go through the steps on how to set a Summary for a bound data field

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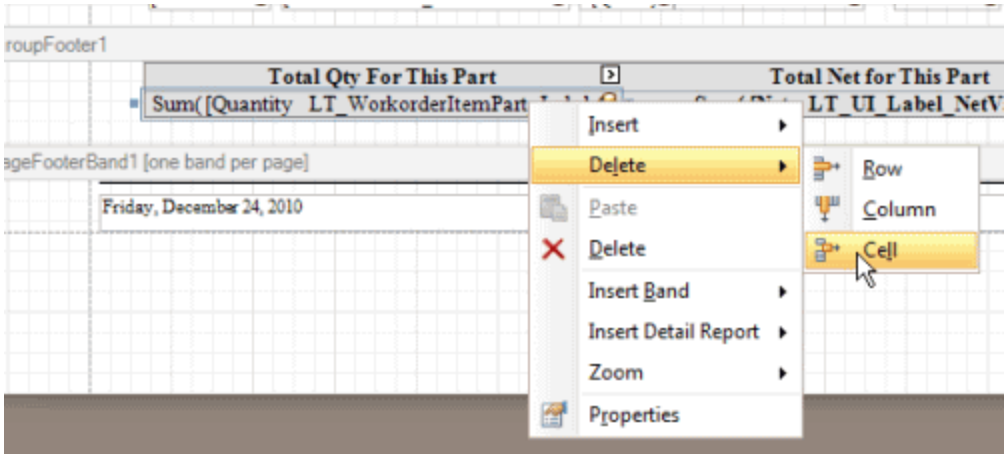
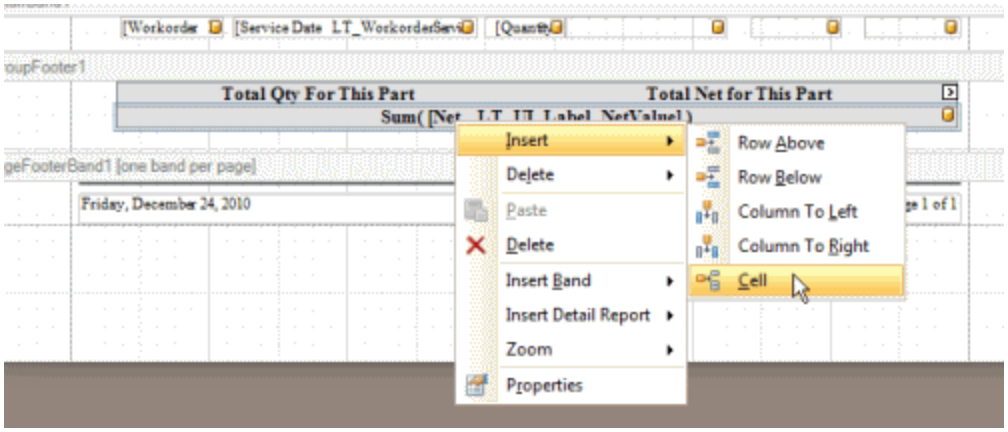
9. Right-click on the Sum([Quantity]) datafield control, select Delete, select Cell



10. Now that there is only one cell in this table row, right-click on the Sum([Net]) datafield control, select Insert, select Cell



11. Select the new TableCell that was created to the left of the Sum([Net]) data control field to highlight it, and select the Properties tab so that you can now edit Properties for it

12. Select the Summary property field browse button to open the Summary Editor

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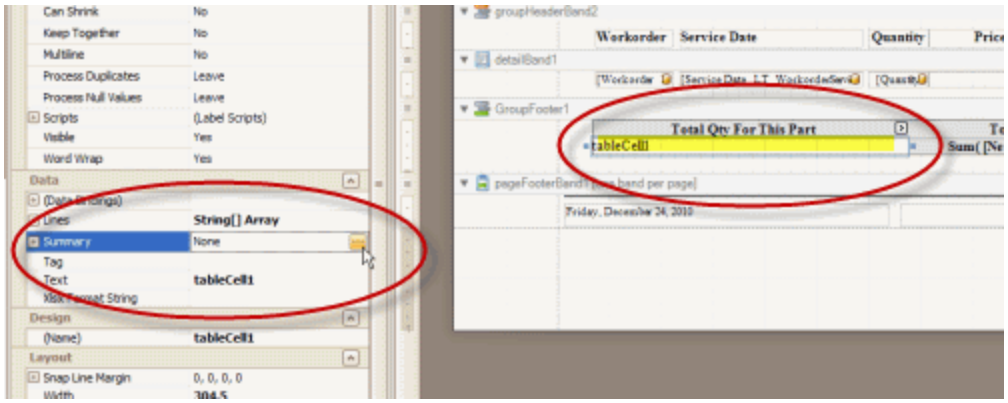
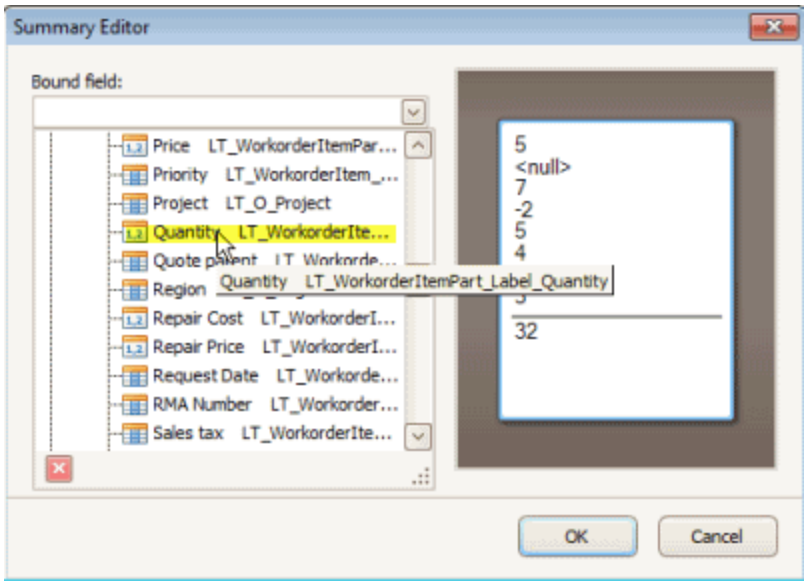


13. In the Summary Editor, drop down the Bound Field, expand the WorkorderServicePartList, and select Quantity



14. Sum is already selected for the Summary function. Select Group for the Summary Running. Select OK to close

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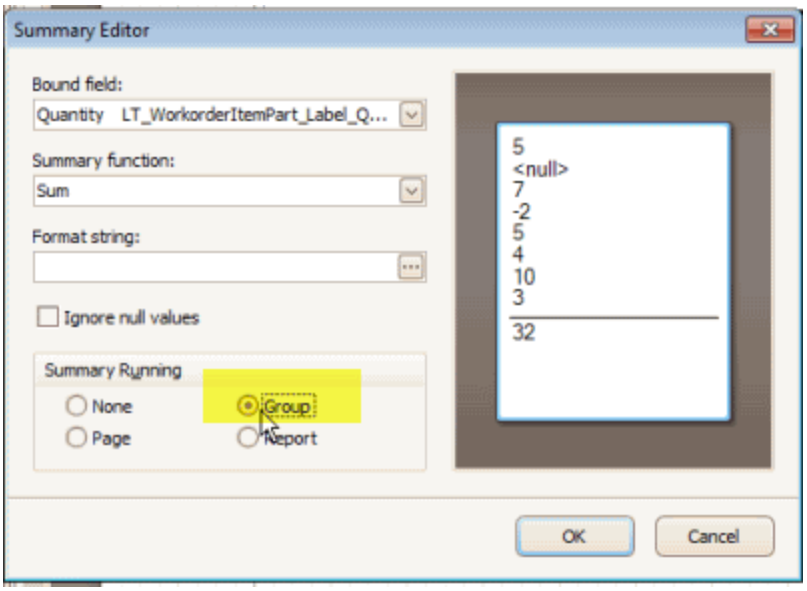

15. Select the link Preview to preview what the report looks like so far

16. You will note that although we now have the group sum - the text alignment is to the left instead of center, and the background color still needs to be edited, and the font needs to be Bold because we deleted the original cell with its formatting. You can always click on another field and see what its appearance properties are set to for reference.

Part CL2457 - Cleaning Wipes - Belkin

Workorder	Service Date	Quantity	Price	Discount	Net
40	2/3/2009 8:00 AM	3	$9.99	0%	$29.97
61	2/3/2009 10:00 AM	1	$9.99	20%	$7.99
4	**Total Qty For This Part**		**Total Net for This Part** $37.96		

17. Back in the Design Panel, select the Properties tab if not already selected, and select the Sum([Net]) data control field so that you can edit its text alignment and background color and font

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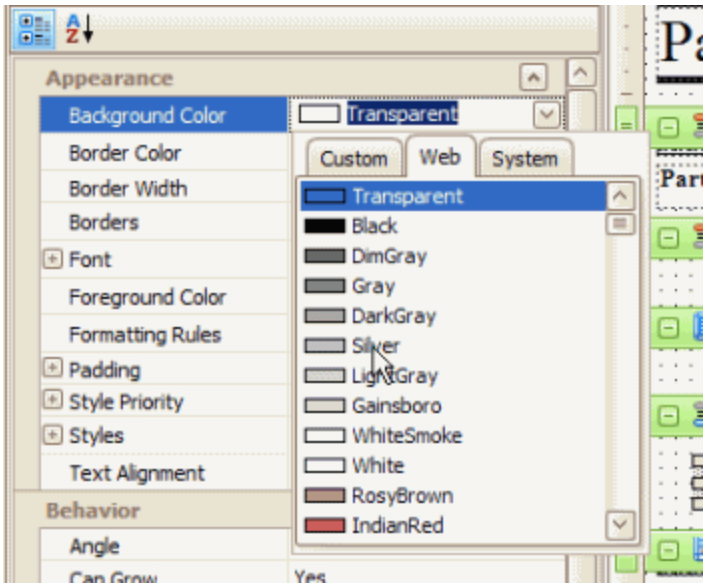

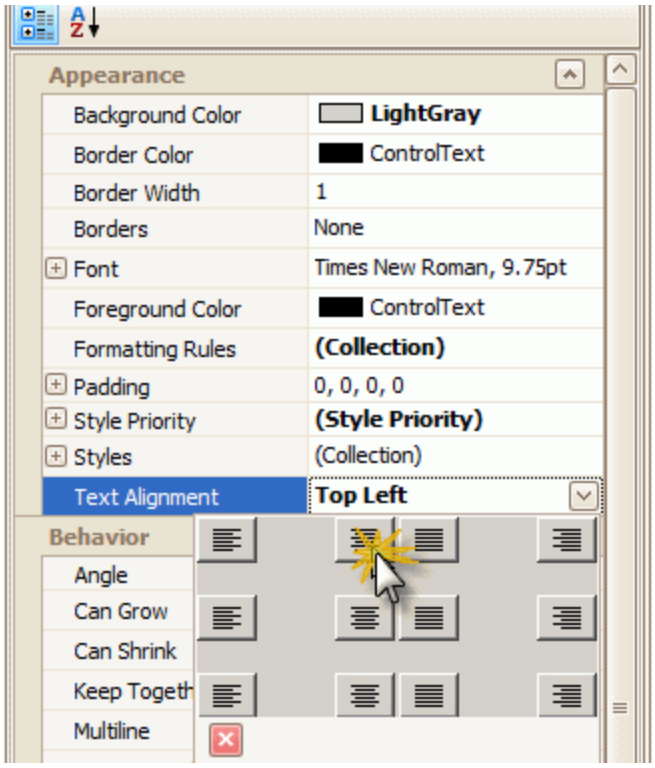

18. Select the Preview link to view that the changes are now similar to that of the other field and as before

19. Save and close the report.

You have now customized a report template to include a automatic summary, and can use this knowledge when customizing and/or creating other report templates

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5.23 Check out the videos on the AyaNova web site

In addition to the detailed information on every feature in this Help file and its tutorials, also check out the videos on the AyaNova web site at https://www.ayanova.com/videos.htm

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5.24 Check out the Tips on the AyaNova Support Forum

In addition to the detailed information on every feature in this Help file and its tutorials, also check out the tips on use on the AyaNova Support Forum and posts by other AyaNova users.

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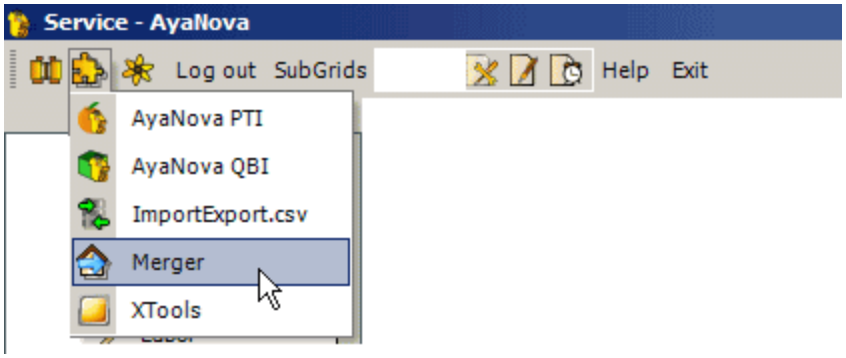
PlugIns

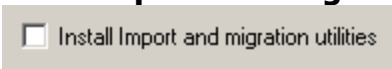
6 PlugIns



Optional add-on's that can be run from within the AyaNova program are available from the main menu and various areas in AyaNova as supported by each plugin

Outlook Schedule Export
The OutlookSchedule plug-in exports the scheduled items for the logged in user into an Outlook calendar.
See: Export to Outlook Schedule

Export to XLS
This plug-in provides the ability to export main grid's column data to an xls file for further data analysis. An Export to XLS license is required to use this plug-in
See: Export to XLS

ImportExport.csv
If you have selected to install the **import and migration utilities** during the initial AyaNova installation 

, then this plug-in option will display so that you can import and/or export clients, or parts
See: Part Import Export
See: Client Import Export

XTools
This utility allows you to enter links to other programs, websites, etc to have quick access while within the AyaNova program.
See: XTools

AyaNova PTI
PTI is an optional add-on that interfaces AyaNova and Peachtree accounting software. Please refer to the PTI web page for features, and to the PTI Online

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Help file for requirements, installation, configuration and use. A PTI license is required to use this plugin.

AyaNova QBI
QBI is an optional add-on that interfaces AyaNova and QuickBooks accounting software. Please refer to QBI web page for features, and to the QBI Online Help file for requirements, installation, configuration and use. A QBI license is required to use this plugin.

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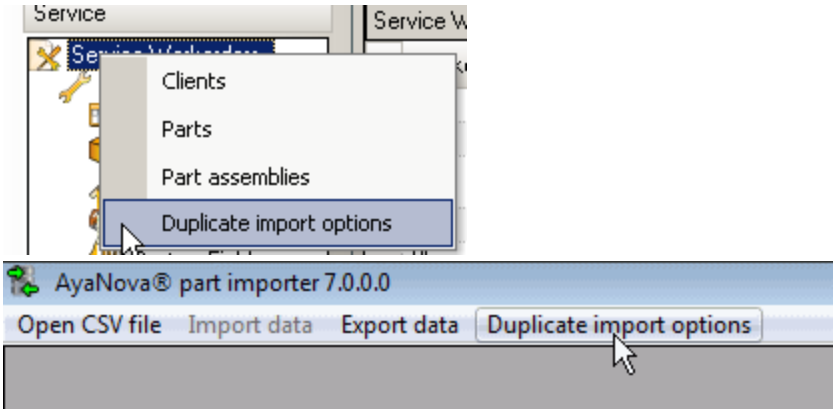
6.1 Part Import Export

6.1.1 What is the Part Import Export

The Part ImportExport.csv utility is available at no charge for mass importing or exporting part records.

- With the no charge utility, only new part records can be imported into AyaNova
- Do note that if the importexport.csv **duplicate option license** is an additional purchase-able feature that gives you the ability to update existing AyaNova Lite part records.



Name, Number, UnitOfMeasure, Cost, Retail, Category, UPC, TrackSerialNumber, WholeSaler, WholeSalerNumber, AlternativeWholeSaler, AlternativeWholeSalerNumber, Manufacturer, ManufacturerNumber, Notes

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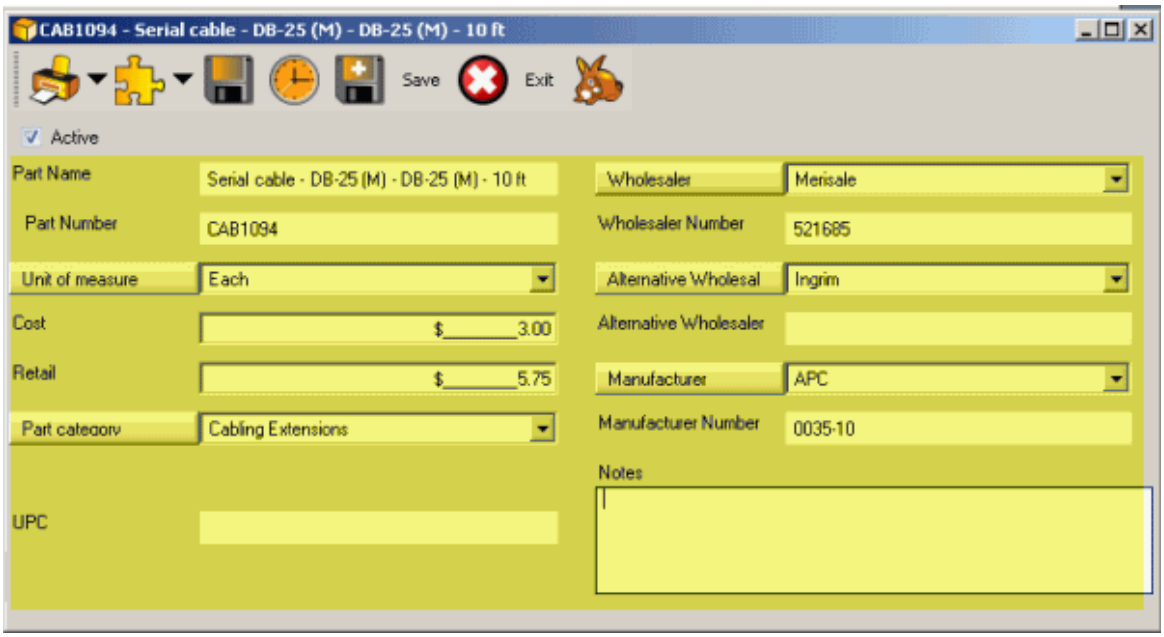


Example of use would be that you have another old program that you were using, and instead of having to re-type in all of the data into AyaNova, export part information from your old database into a CSV file that is as per the layout identified, and then import quickly and easily into AyaNova.

Another example is where you want to export your part information to another program. Use the ImportPartCSV utility to create an export CSV file of all of your parts.

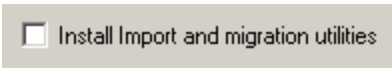
NOTE: Do **not** import parts that you will not actually use. As every time you view a workorder entry screen, AyaNova has to get the list of potential parts you might select - so if you have 20,000 parts even though only use about 2000, having to load the list of 20,000 parts will greatly affect how fast it will take to view the workorder entry screen.

6.1.2 Part Import Export Installation & Configuration

1. Perform the AyaNova installation

- If you had previously installed AyaNova, just run the AyaNovaSetup.exe file for your version again

2. During the AyaNovaSetup.exe installation, select the **Install Import and migration utilities**



3. Complete the installation

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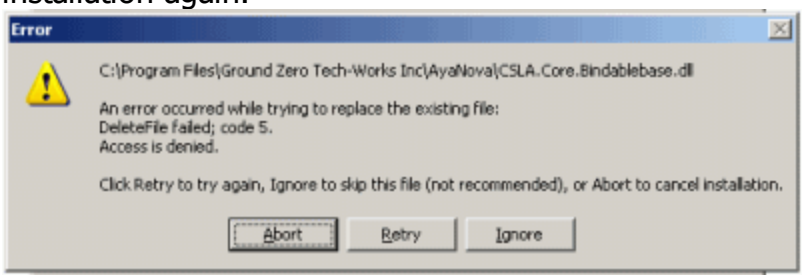
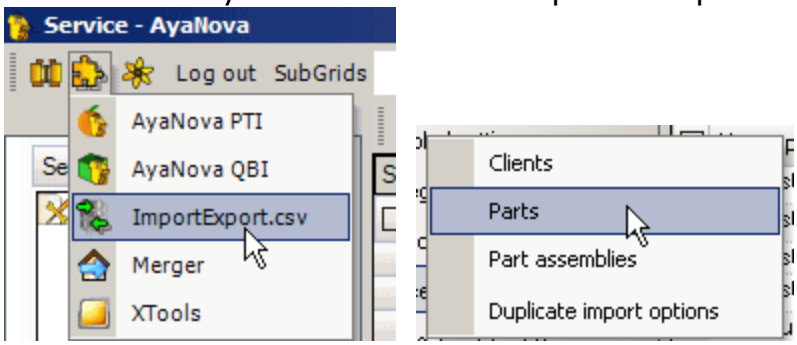
NOTE: if you get a message such as below about replacing a file, this is occurring because you have something running. Click Abort, and then check to make sure you do NOT have the AyaNova program running. Then run the installation again.

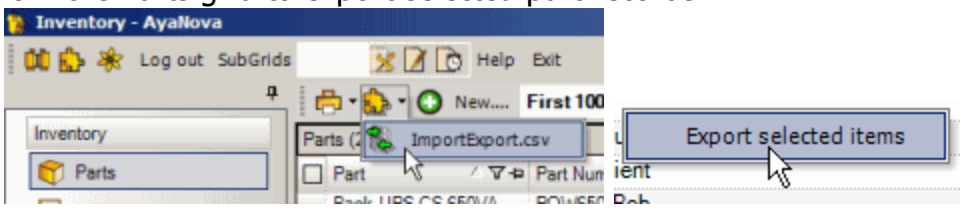


4. Run the Part import export utility from within the AyaNova program

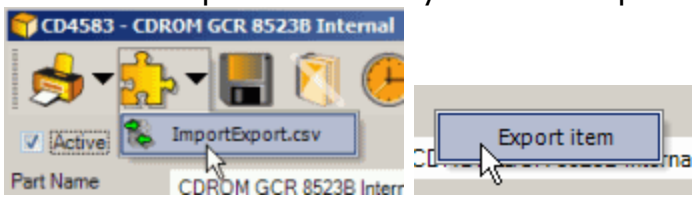
- From the main AyaNova menu bar to export or import



- From the Parts grid to export selected part records



- From within a specific Part entry screen to export that specific part



6.1.3 Exporting Parts into a CSV format file

The Part import/export utility must be installed **before** proceeding.

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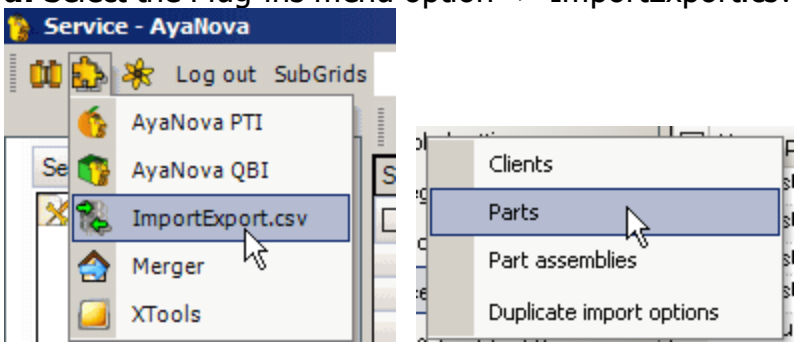
You can export part records from three places in the AyaNova program:

1. **From the main AyaNova menu bar**
2. **From the Parts grid to export selected part records**
3. **From within a specific Part entry screen to export that specific part**

1. From the main AyaNova menu bar

a. Select the Plug-ins menu option -> ImportExport.csv -> Parts



b. The Part import/export utility will open

c. Select the menu option **Export data** in the import/export utility

d. Browse to the location where you want to save the file and Save

e. If you edit this file using Notepad, you will also see the format - that each field is quoted (surrounded by quotation marks) if there are spaces in the text, as well as divided by a comma.

f. All parts will be exported to the CSV file

2. From the Parts grid to export selected part records

a. In the Parts grid, either select specific parts you want to export to a CSV file by holding down the CTRL key and your mouse, or selecting all by selecting the column row header

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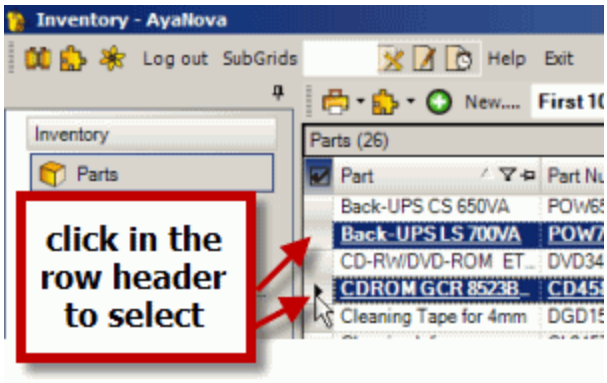
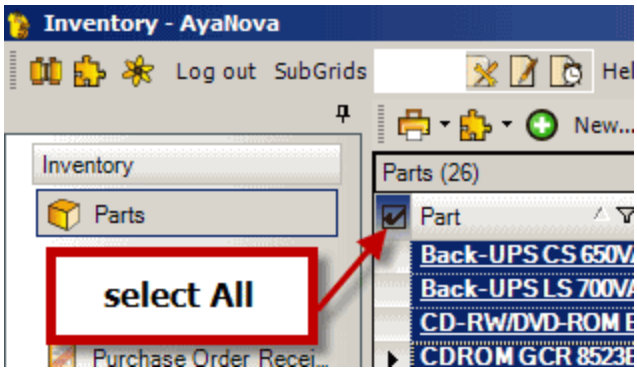
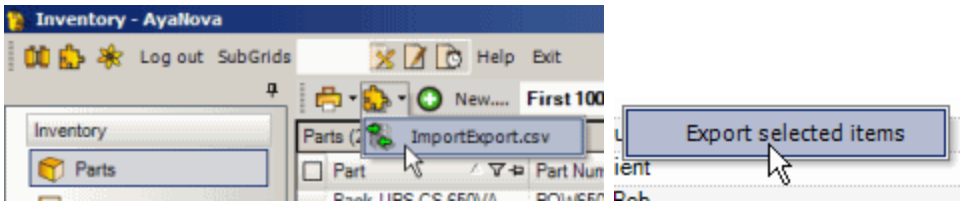




b. From the Parts grid menu, drop down the Plug-in's menu and select ImportExport.csv -> Export selected items

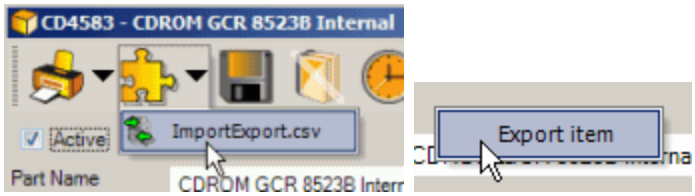


c. Browse to the location where you want to save the file and Save

d. Only those parts selected will be exported to the CSV file

3. From within a specific Part entry screen to export that specific part

a. From within a specific Part entry screen, drop down the Plug-in's menu option, select ImportExport.csv -> Export item



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b. Browse to the location where you want to save the file and Save

c. Only this part will be exported to the CSV file

6.1.4 Part import file format requirements

Format of your Part import file:

- For an example of what the format looks like, just do a test export of existing AyaNova parts to a file, and than open that file using NotePad.
- File must be comma delimited with an extension of .CSV (Excel makes these, as do most export programs. CSV refers to Comma Separated Values)
- The csv file can contain any of the following 15 fields (these correspond to the fields in the part entry screen) **in any order**:

  Name, Number, UnitOfMeasure, Cost, Retail, Category, UPC, TrackSerialNumber, WholeSaler, WholeSalerNumber, AlternativeWholeSaler, AlternativeWholeSalerNumber, Manufacturer, ManufacturerNumber, Notes

  You can also see these in the screenshot of the part entry screen fields that can be imported into

- Fields can be **in any order** (as you identify when you run the import utility which unit entry screen field to import each of your import file columns into)
- Every record in your import file must have at minimum the Number field
- **If** the field contains a comma, a return, or a quotation mark character, than that field **must** be quoted (surrounded by quotation characters)

  For example, if the field for WholesalerNumber is 2340-00, 009 you must have quotes around it as in "2340-00, 009" so that the comma is understood to be part of the field not a new field.

- Fields that exceed the length of the field in the AyaNova client entry screen will be truncated.
- Do not have the first row contain header information - just data.

Additional important information about the importing of part records:

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- Backup your AyaNova database **before** importing, there is no undo feature and it's easy to accidentally have a field in the wrong position as the import utility has no way of confirming if a phone number (for example) is in the email address column.

- Use the export feature to export your current parts in AyaNova to a comma separate values file which you can then open up using NotePad and see the correct format even before creating your own for import.

- Comma Separated Values files (.csv files) can be created and opened directly using Microsoft Access, this is handy if you wish to "massage" the data before importing or examine or work with an exported Clients.csv file

- For better performance when importing a large number of parts, import from the fastest connection to the database possible, i.e. don't import parts via a dataportal unless performance is not a concern.

- NOTE: In some cases, when you use MS Excel to edit or create a CSV file, the resultant file will not have quotes around the fields that require it.

    - You can easily check by opening the file using Notepad.
    - If you get errors trying to import a file you edited in Excel, it is suggested to import it into a table in Microsoft Access.
    - Right click on the table in MS Access, select Export…, select CSV from the drop down list and the CSV file will be created correctly with quotes and commas.
    - If you do not have MS Access, send the existing CSV file zipped using WinZip to AyaNova Support, along with the full text of the error you received and what you checked so far and we can see if we can import into MS Access for you and create the formatted CSV file.

- With the no charge importexport.csv utility, duplicate parts will not be imported, the Part number is examined before each part is imported and if the Part number is found to be in AyaNova already then that record is not imported. This means you can re-import the same data safely without getting duplicate records.

- Whereas with the licensed importexport.csv utility, you can update existing part records. See the Import duplicate record update options for Part for more details

- After importing, examine the imported records and ensure fields were imported to the correct area of the part record.

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6.1.5 Importing Parts into AyaNova from a CSV format file

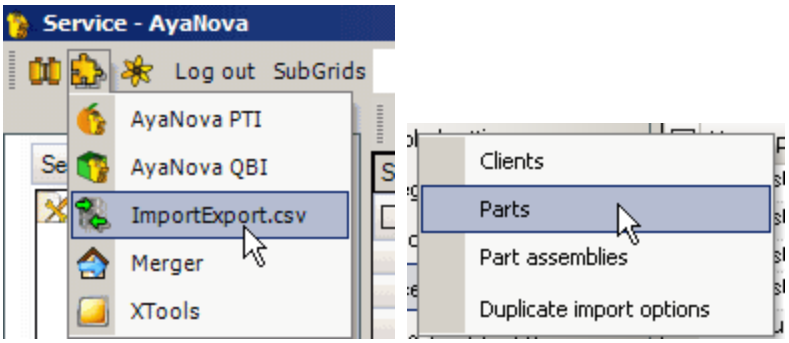
Steps to import:

1. Before importing:

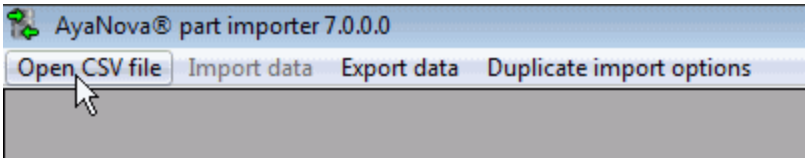
   - Backup your AyaNova database before proceeding, and make sure no one else is entering or editing data when you import.
   - Perform the import on the same computer where the database resides, and where the CSV file is.
   - Log in as a user with rights to create parts.

2. The Part import/export utility must be installed before proceeding.

3. From the main menu select Plugins -> ImportExport.csv -> Parts to open the client import/export program



4. Select the menu option Open CSV file, and browse to the location of your csv import file and select it



5. The records in your import file will display. Now you can select what AyaNova part field to import each into.

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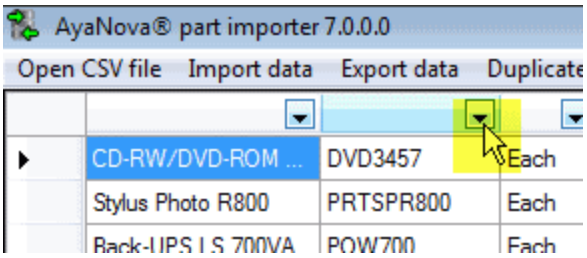
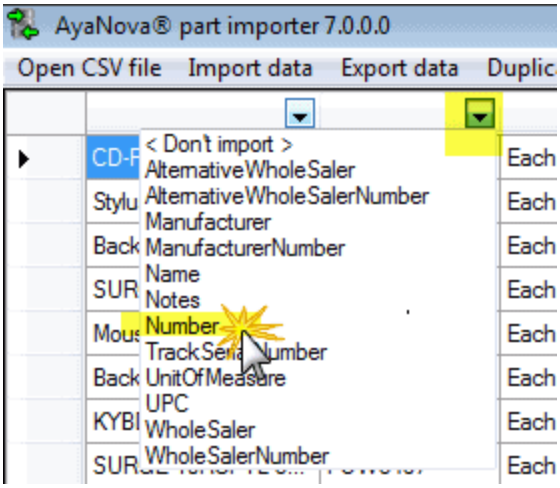
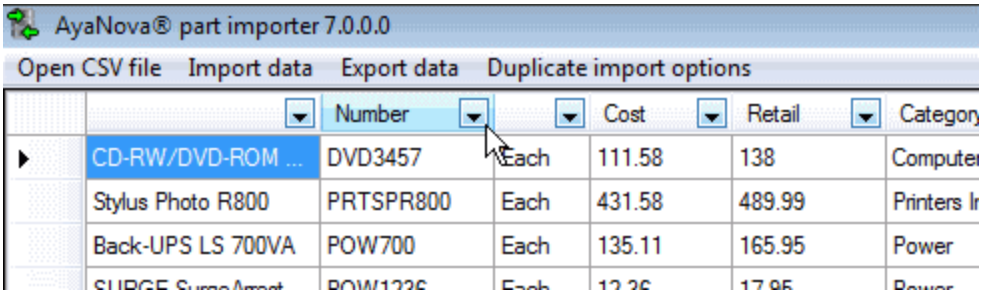
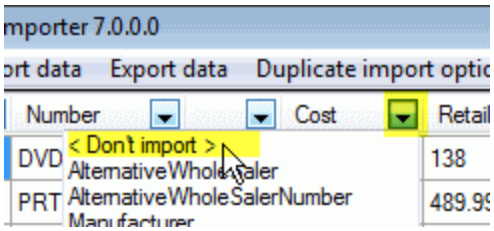
6. Drop down the column heading for each, and select the field you want that to import into. In the example below, we are selecting the Number field for that column. No problem if the order of your fields in your import file may be different - as you select which you want for your own columns.







If you make an incorrect selection or selections from previous imports are showing, just drop down the list again and select <don't import> to free up that column and that selection again



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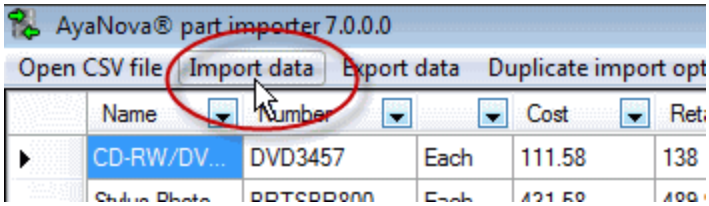
7. If you have purchased an ImportExport.csv license, the Duplicate import options menu is also available so that you can set what should overwrite or not. Refer to Import duplicate record update options for Part for more details

8. Once you have selected what fields you want to import, select the menu option **Import data**

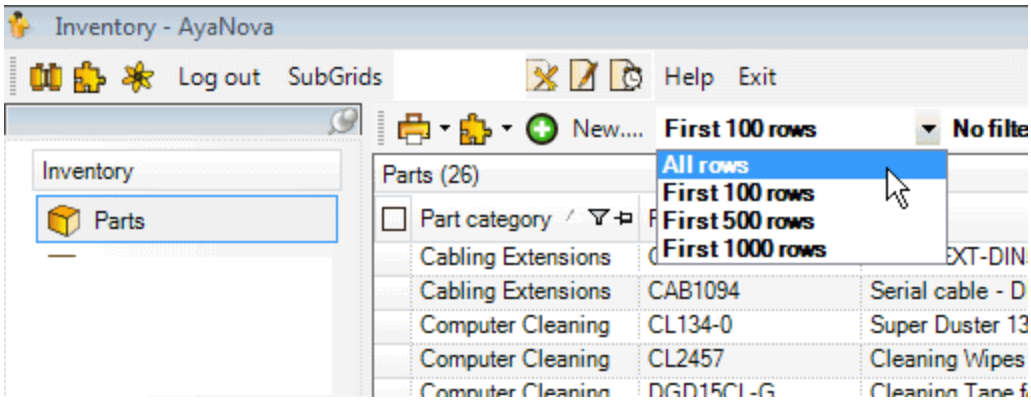


9. Your records from your import file will now be imported into AyaNova

- The time it will take will depend on the number of records to import

10. When the import is finished, a message will display identifying the number of part records imported, the number not imported if duplicates, and if duplicate settings use, how many were updated.

11. Exit out and view your parts in the Parts grid. Don't forget that you can change the list of rows to view at any time as well as Refresh.



6.1.6 Import duplicate record update options for Parts

The no charge ImportExport.csv utility provides the ability to import and export part records into and out of AyaNova

If you have purchased the Importexport.csv duplicate option license, then you will also have the ability **to <u>update existing</u>** AyaNova part records with this utility.

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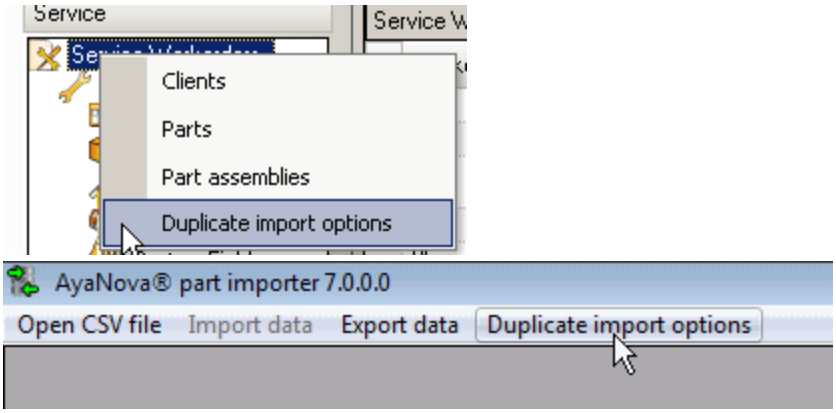
Only if you have purchased a license for the Importexport.csv duplicate option will the Duplicate import options menu show on the initial drop down list and in the importexport.csv screen



1. Select the Duplicate import options menu from either of the two locations as per above.

This will open the Import duplicate record update options window

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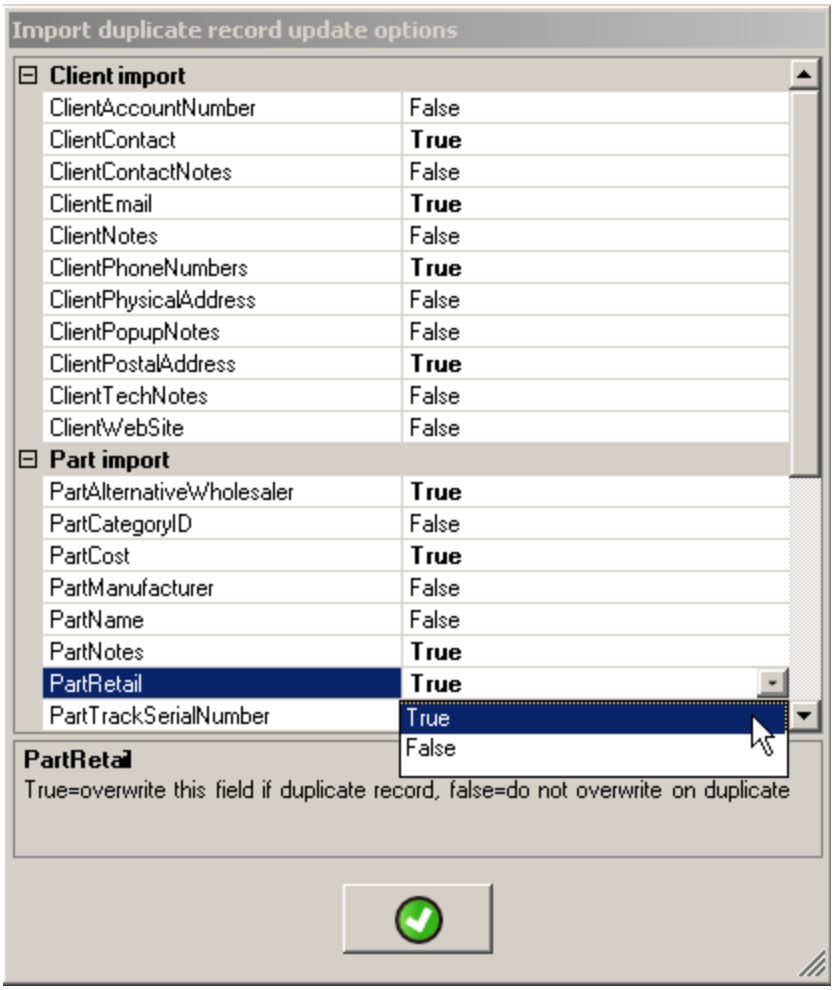

2. If you want an existing Part record's Cost field to be updated if an existing AyaNova part record already exists, then set to True. If you want an existing Parts record's Retail price field updated, then set to True; and so on.

3. Click on the green OK button to save any True False settings, and then import your data into AyaNova.

A message will display identifying the following:

- how many new parts were imported (in screenshot above, this is 16)
- how many existing parts were updated (in screenshot above, this is 8)

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- how many parts were not imported because they were exact duplicates having no changes from existing AyaNova parts; or because they did not follow the format rules. (in screenshot above, 344 parts were not imported because they were exact duplicates - no changes from existing).

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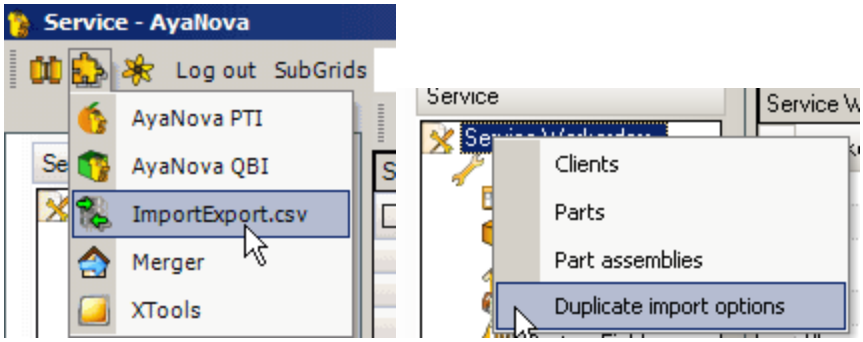
6.2 Client Import Export

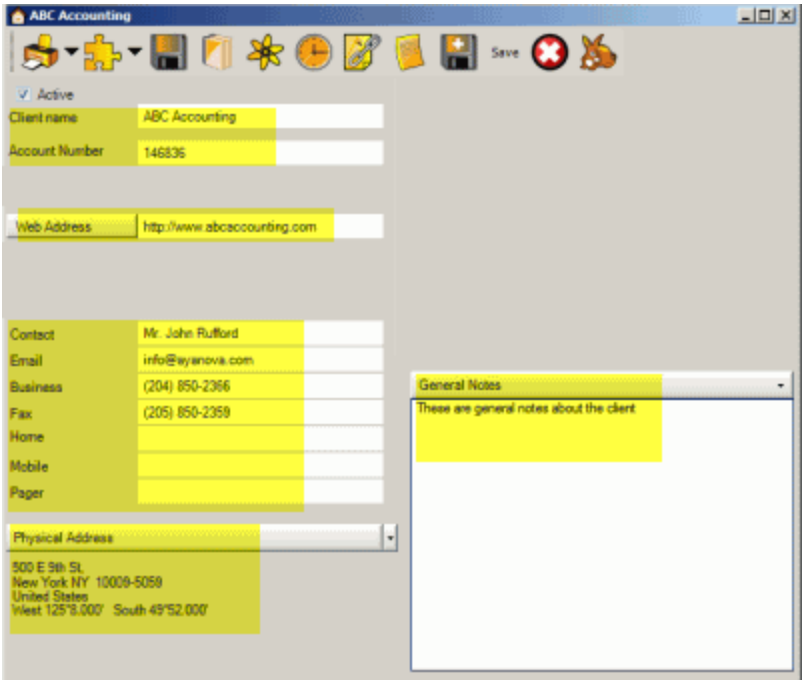
6.2.1 What is the Client Import Export

The Client ImportExport.csv utility is available at no charge for mass importing and/or exporting client records.

- With the importexport.csv **duplicate optional plug-in license** you can **also** update existing AyaNova client records such as update address etc.



Fields of the Client entry screen that are **exported out of AyaNova** and **that can be imported into AyaNova:**



ClientName, AccountNumber, WebSite, Contact, Email, Phone1, Phone2, Phone3, Phone4, Phone5, GeneralNotes

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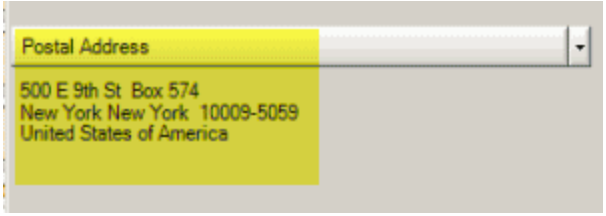
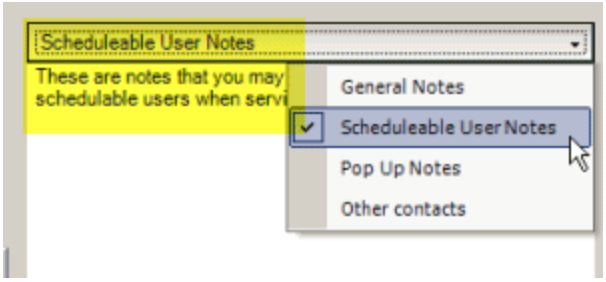
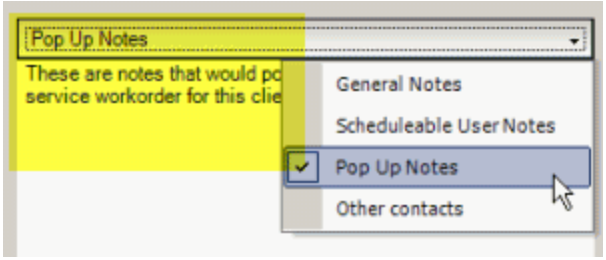
DeliveryAddress, DeliveryCity, DeliveryStateProvince, DeliveryCountry, DeliveryZipPostal



MailAddress, MailCity, MailStateProvince, MailCountry, MailZipPostal,





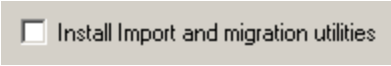
General Notes, TechNotes, PopupNotes, OtherContacts

6.2.2 Client Import Export Installation & Configuration

1. Perform the AyaNova installation

- If you had previously installed AyaNova, just run the AyaNovaSetup.exe file for your version again

2. During the AyaNovaSetup.exe installation, select the **Install Import and migration utilities**



3. Complete the installation

NOTE: if you get a message such as below about replacing a file, this is occurring because you have something running. Click Abort, and then check to

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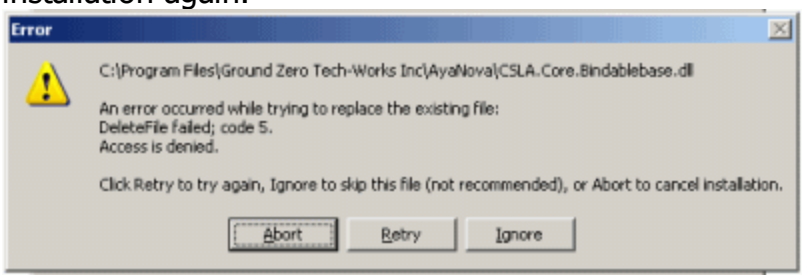
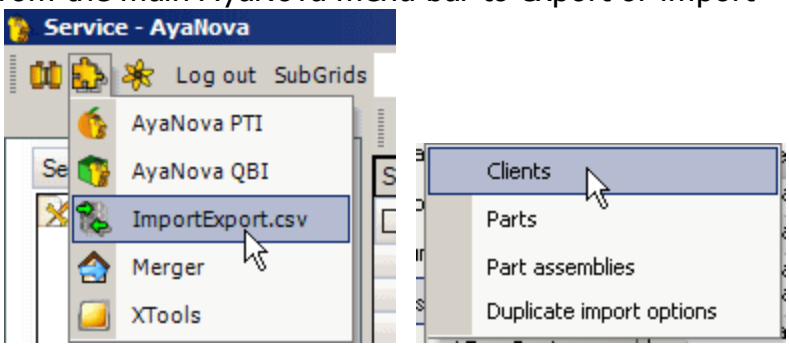
make sure you do NOT have the AyaNova program running. Then run the installation again.

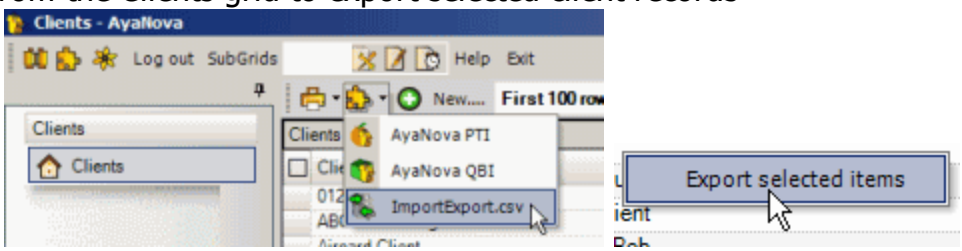


4. Run the Client import export utility from within the AyaNova program

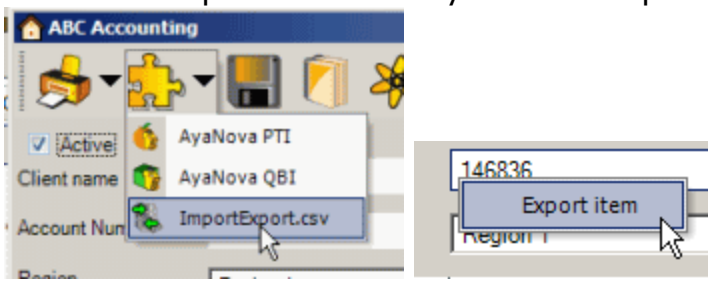
- From the main AyaNova menu bar to export or import



- From the Clients grid to export selected client records



- From within a specific Client entry screen to export that specific client



6.2.3 Exporting Clients into a CSV format file

The Client import/export utility must be installed and configured before proceeding.

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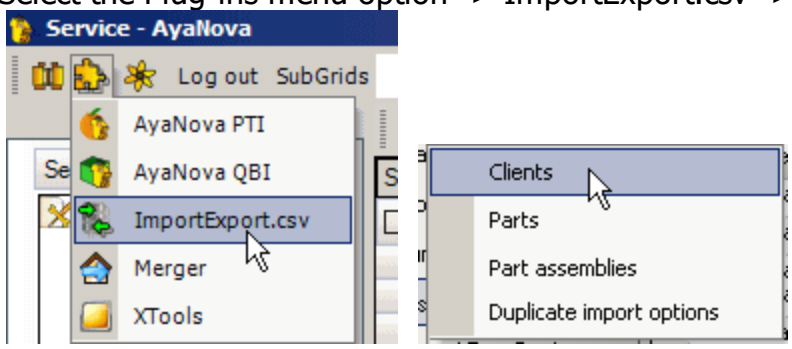
You can export client records from three places in the AyaNova program:

1. **From the main AyaNova menu bar**
2. **From the Clients grid to export selected client records**
3. **From within a specific Client entry screen to export that specific client**

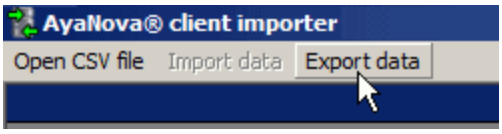
1. From the main AyaNova menu bar

a. Select the Plug-ins menu option -> ImportExport.csv -> Clients

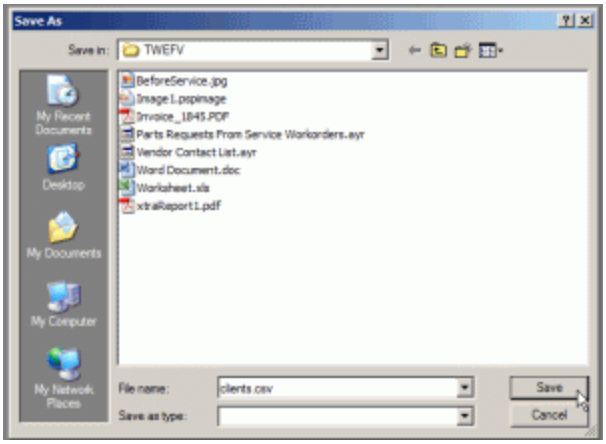


b. The Client import/export utility will open

c. Select the menu option **Export data**



d. Browse to the location where you want to save the file and Save



e. If you edit this file using Notepad, you will also see the format - that each field is quoted (surrounded by quotation marks) if there are spaces in the text, as well as divided by a comma.

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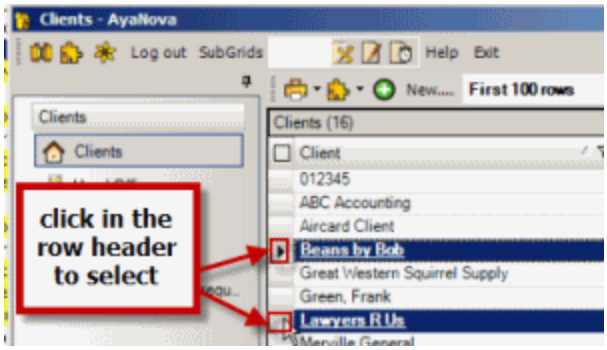
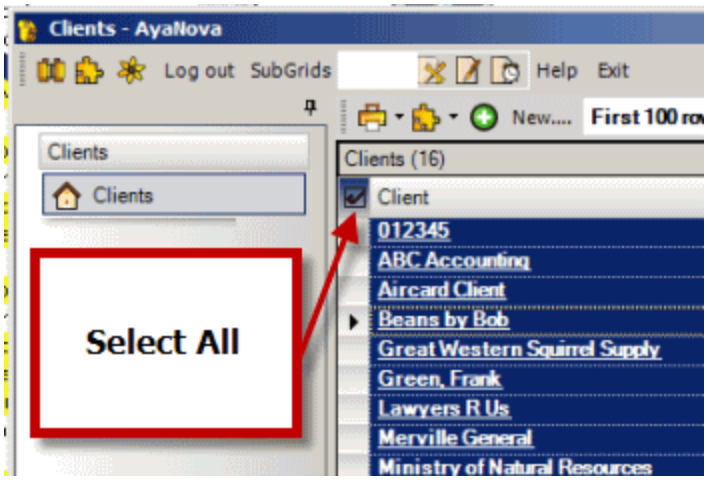
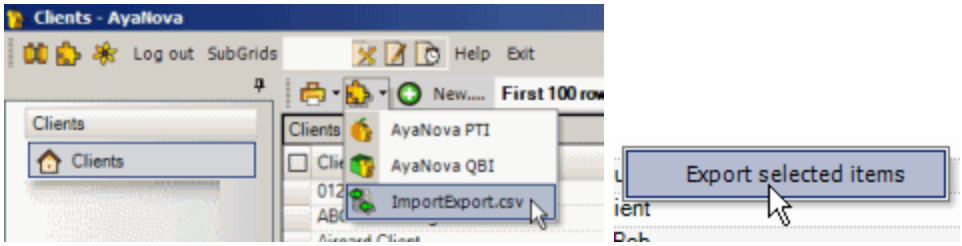
2. From the Clients grid to export selected client records

a. In the Clients grid, either select specific clients you want to export to a CSV file by holding down the CTRL key and clicking with your mouse, or selecting all by selecting the column row header





b. From the Clients grid menu, drop down the Plug-in's menu and select ImportExport.csv -> Export selected items



c. Browse to the location where you want to save the file and Save

d. Only those clients selected will be exported to the CSV file

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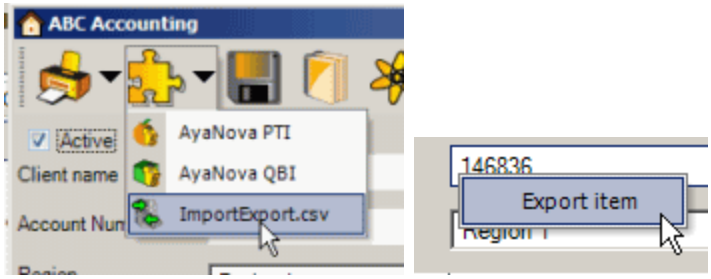
3. From within a specific Client entry screen to export that specific client

a. From within a specific Client entry screen, drop down the Plug-in's menu option, select ImportExport.csv -> Export item



b. Browse to the location where you want to save the file and Save

6.2.4 Client import file format requirements

Format of your client import file:

- For an example of what the format looks like, just do a test export of existing AyaNova clients to a file, and than open that file using NotePad.
- File must be comma delimited with an extension of .CSV (Excel makes these, as do most export programs. CSV refers to Comma Separated Values)
- The csv file can contain any of the following 24 fields (these correspond to the fields in the client entry screen) **in any order**:

  ClientName, MailAddress, MailCity, MailStateProvince, MailCountry, MailZipPostal, DeliveryAddress, DeliveryCity, DeliveryStateProvince, DeliveryCountry, DeliveryZipPostal, Contact, Other Contacts, Business, Fax, Home, Mobile, Pager, Email, AccountNumber, WebSite, GeneralNotes, TechNotes, PopupNotes

  You can also see these in the screenshots of the client entry screen fields that can be imported into

- Fields can be **in any order** (as you identify when you run the import utility which client entry screen field to import each of your import file columns into)
- Every record must have at minimum the Name field

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- **If** the field contains a comma, a return, or a quotation mark character than that field **must** be quoted (surrounded by quotation characters)

  For example, if the field for MailAddress is **234 Mydrive St, Box 435** you must have quotes around it as in "**234 Mydrive St, Box 435**" so that the comma is understood to be **part of the field** not a new field.

- Fields that exceed the length of the field in the AyaNova client entry screen will be truncated.

- Do not have the first row contain header information - just data.

Additional important information about the importing of client records:

- Backup your AyaNova database **before** importing, there is no undo feature and it's easy to accidentally have a field in the wrong position as the import utility has no way of confirming if a phone number (for example) is in the email address column.

- Use the export feature to export your current clients in AyaNova to a comma separate values file which you can then open up using NotePad and see the correct format as a guide before creating your own for import.

- Comma Separated Values files (.csv files) can be created and opened directly using Microsoft Access, this is handy if you wish to "massage" the data before importing or examine or work with an exported Clients.csv file

- For better performance when importing a large number of clients, do the import from the fastest connection to the database possible, i.e. don't import clients via a dataportal unless performance is not a concern.

- NOTE: In some cases, when you use MS Excel to edit or create a CSV file, the resultant file will not have quotes around the fields that require (i.e. fields with spaces in them or return characters).
  - You can easily check by opening the file using Notepad.
  - If you get errors trying to import a file you edited in Excel, it is suggested to import it into a table in Microsoft Access.
  - Right click on the table in MS Access, select Export…, select CSV from the drop down list and the CSV file will be created correctly with quotes and commas.
  - If you do not have MS Access, send the existing CSV file zipped using WinZip to AyaNova Support, along with the full text of the error you received and what you checked so far and we can see if we can import into MS Access for you and create the formatted CSV file.

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- With the no charge importexport.csv utility, duplicate clients will not be imported, the client name is examined before each client is imported and if the client name is found to be in AyaNova already then that record is not imported. This means you can re-import the same data safely without getting duplicate records.
- Whereas with the licensed importexport.csv utility, you can update existing client records. See the Import duplicate record update options for Client for more details
- After importing, examine the imported records and ensure fields were imported to the correct area of the client record.

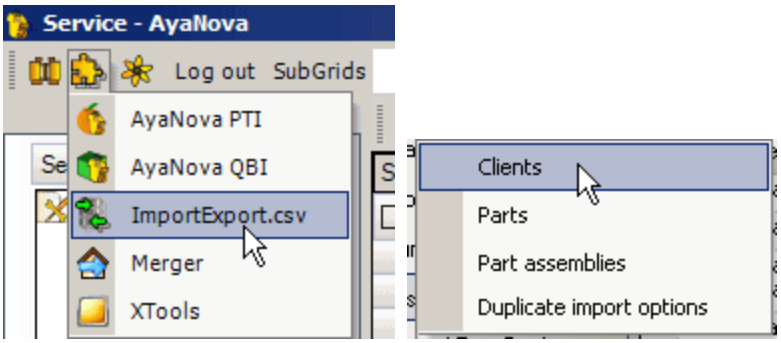
6.2.5 Importing Clients into AyaNova from a CSV format file

Steps to import:

1. Before importing:
   - Backup your AyaNova database before proceeding
   - Perform the import on the same computer where the database resides, and where the CSV file is.

2. The Client import/export utility must be installed before proceeding.

3. From the main menu select Plugins -> ImportExport.csv -> Clients to open the client import/export program



4. Select the menu option Open CSV file, and browse to the location of your csv import file and select it

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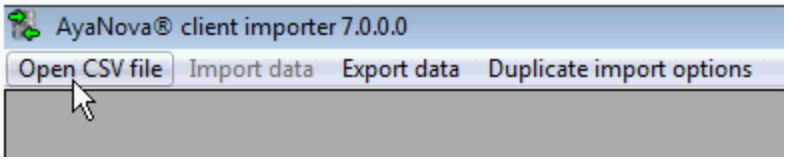
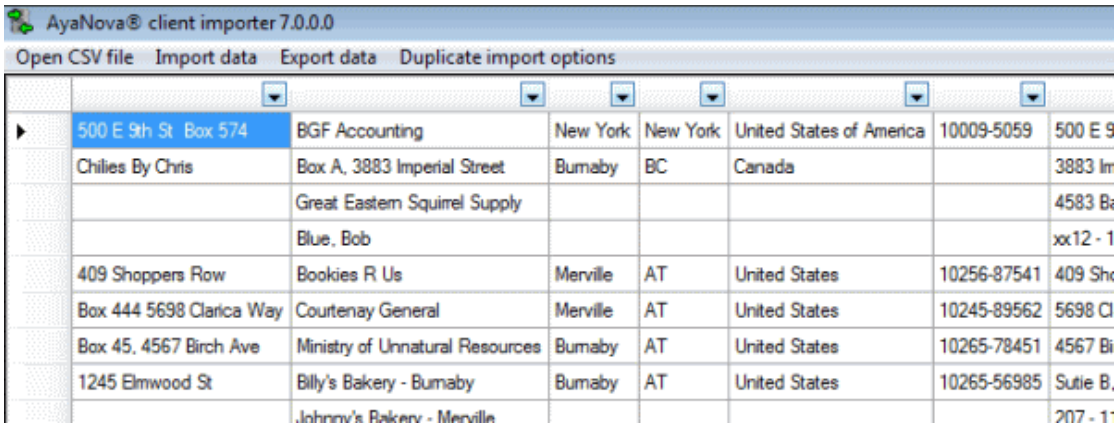


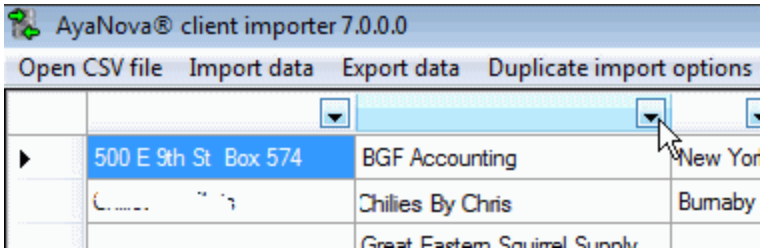
5. The records in your import file will display



6. Now you need to tell the utility where to import each field.

Drop down the column heading for each, and select the client field you want that to import into. In the example below, we are selecting the Name field for that column.

No problem if the order of your fields in your import file may be different - as you select which you want for your own columns.



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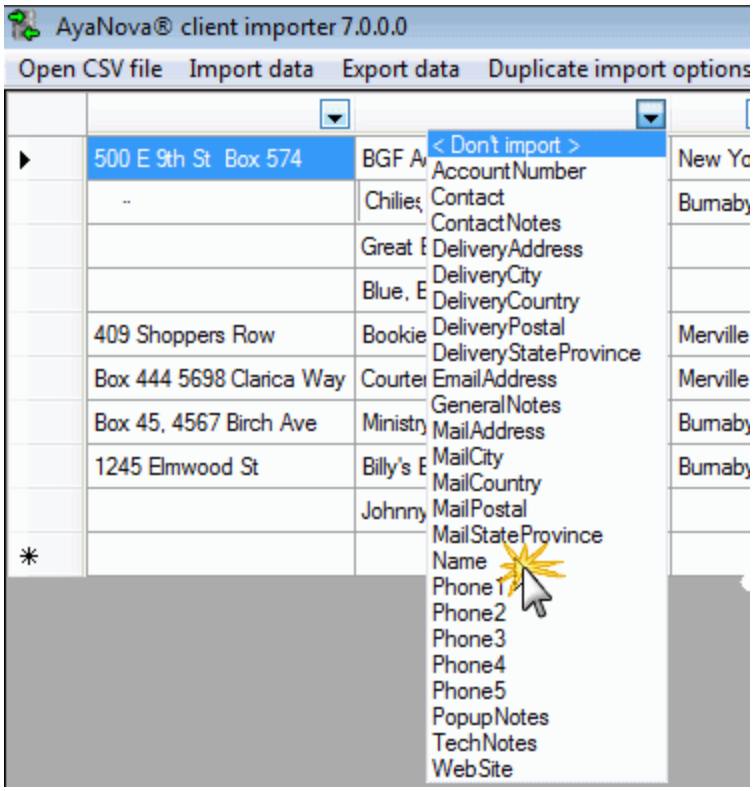
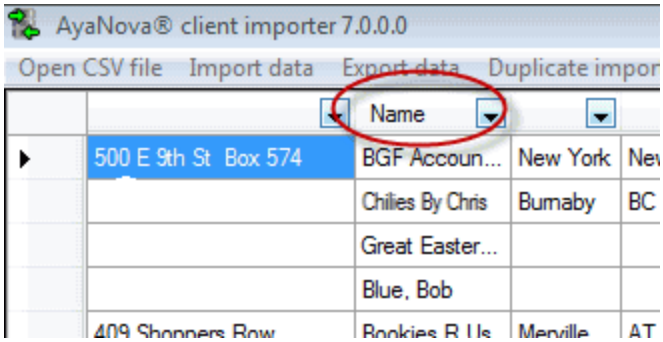
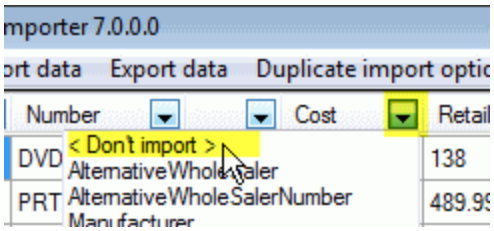




If you make an incorrect selection or selections from previous imports are showing, just drop down the list again and select <don't import> to free up that column and that selection again



7. If you have purchased an ImportExport.csv license, the Duplicate import options menu will display so that you can set what should overwrite or not. Refer to [Import duplicate record update options for Client](#) for more details

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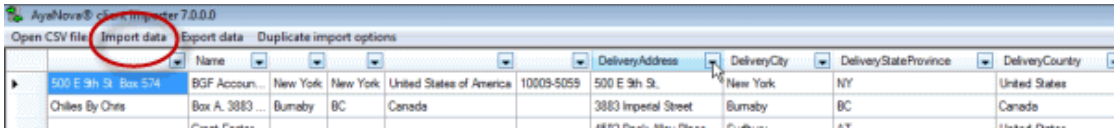
8. Once you have selected what fields you want to import, select the menu option **Import data**

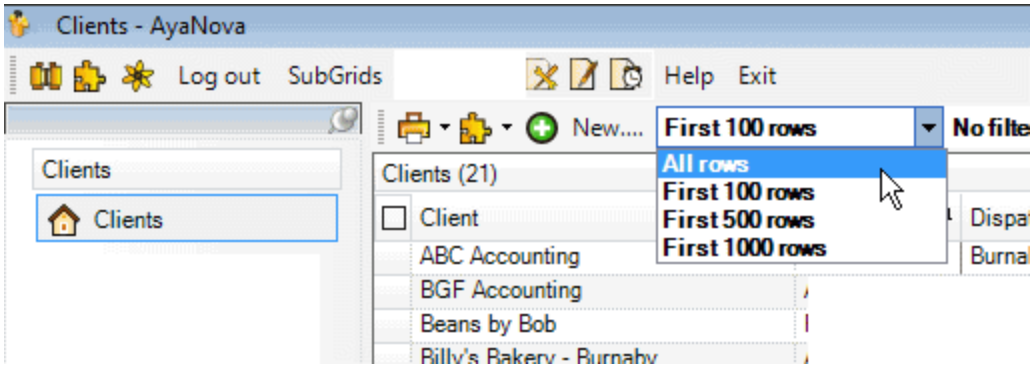


9. Your records from your import file will now be imported into AyaNova

- The time it will take will depend on the number of records to import

10. When the import is finished, a message will display identifying the number of client records imported, the number not imported if duplicates, and if duplicate settings use, how many were updated.

11. Exit out and view your clients in the Clients grid. Don't forget that you can change the list of rows to view at any time, as well as Refresh



6.2.6 Import duplicate record update options for Clients

The no charge ImportExport.csv utility provides the ability to import and export client records into and out of AyaNova

If you have purchased the Importexport.csv duplicate option license, then you will also have the ability **to <u>update existing</u>** AyaNova client records with this utility.

<u>Only</u> if you have purchased a license for the Importexport.csv duplicate option will the Duplicate import options menu show on the initial drop down list and in the importexport.csv screen

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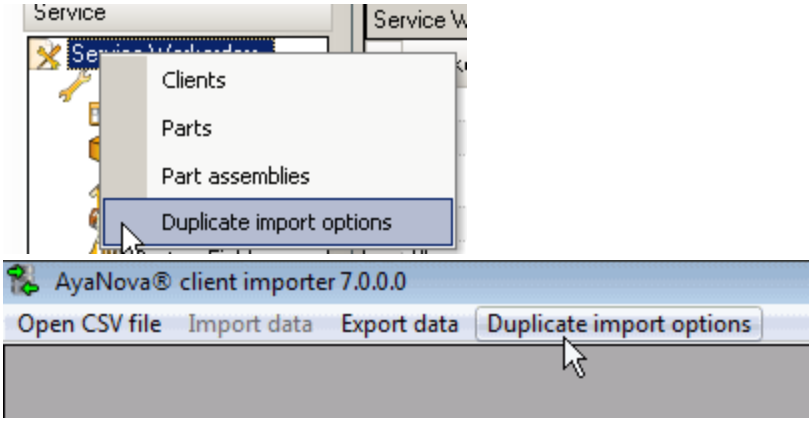
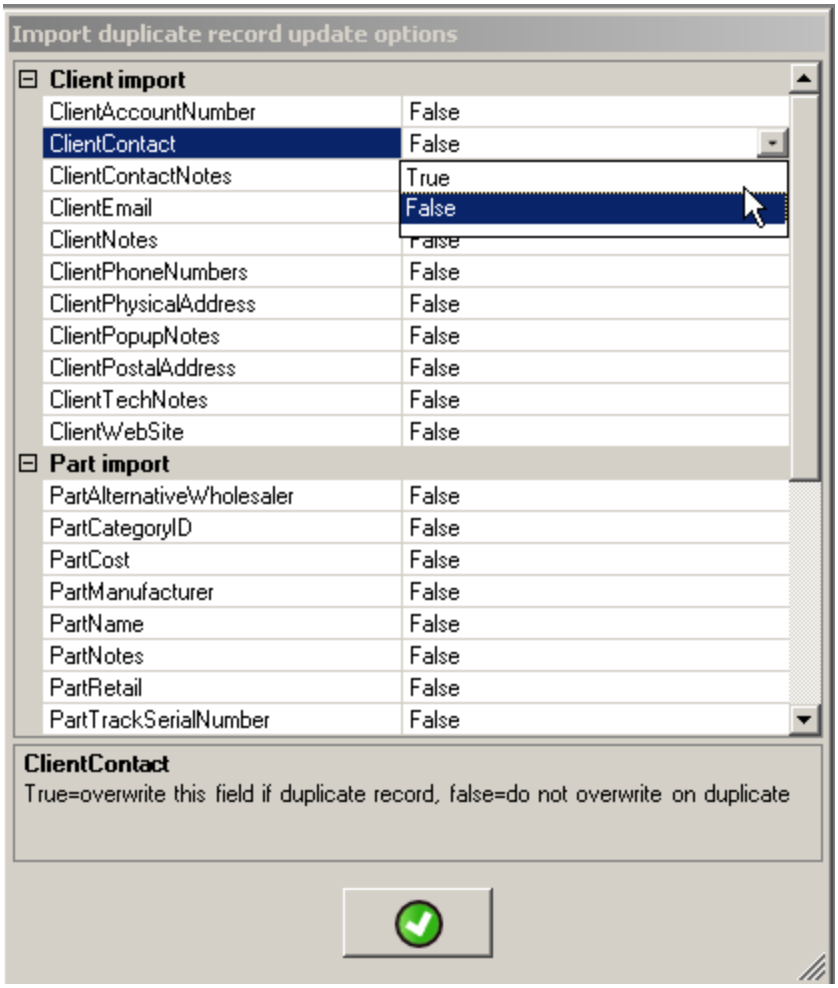


1. Select the Duplicate import options menu from either of the two locations as per above.

This will open the Import duplicate record update options window



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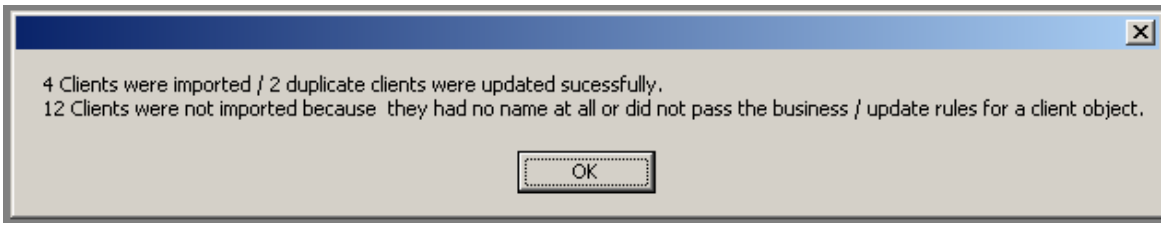
2. If you want an existing Client record's Contact field to be updated if an existing AyaNova client record already exists, then set to True. If you want an existing Client record's Postal address updated, then set to True; and so on.

3. Click on the green OK button to save any True False settings, and then import your data into AyaNova.



A message will display identifying the following:

- how many new clients were imported (in screenshot above, this is 4)
- how many existing clients were updated (in screenshot above, this is 2)
- how many clients were not imported because they were exact duplicates having no changes from existing AyaNova clients; or because they did not follow the format rules. (in screenshot above, 12 clients were not imported because they were exact duplicates - no changes from existing).

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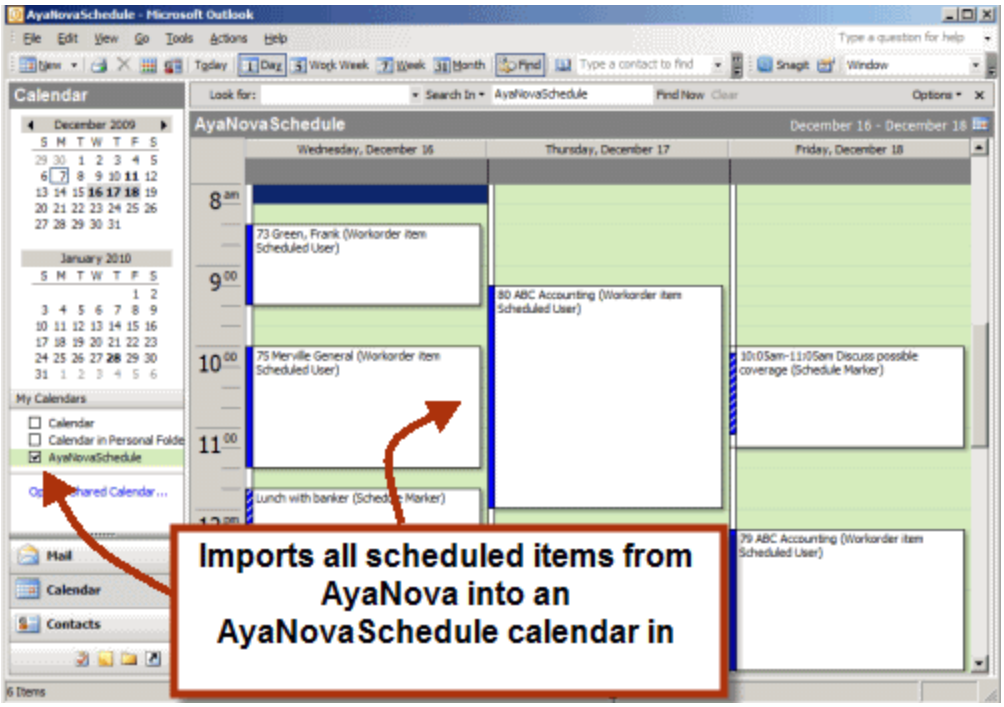
6.3 Export to Outlook Schedule plug-in

6.3.1 Outlook Schedule Export



The **OutlookSchedule plug-in:**

- Exports newer scheduled items (Schedule Markers and workorder items) into an Outlook calendar called AyaNovaSchedule
- Supports Outlook 2002 and higher
- Fully accessible while trialing AyaNova; purchase if you would like to continue using when you go live

OutlookSchedule plug-in installation:

1. Download the Outlook Schedule Export setup file for your version from the Downloads web page
2. Install by running the setup file
   - The OutlookSchedule plug-in files will be installed to this computer in the C:\Program Files\Ground Zero Tech-Works Inc\AyaNova\plugins\OutlookSchedule folder
3. A OutlookSchedule database license is required

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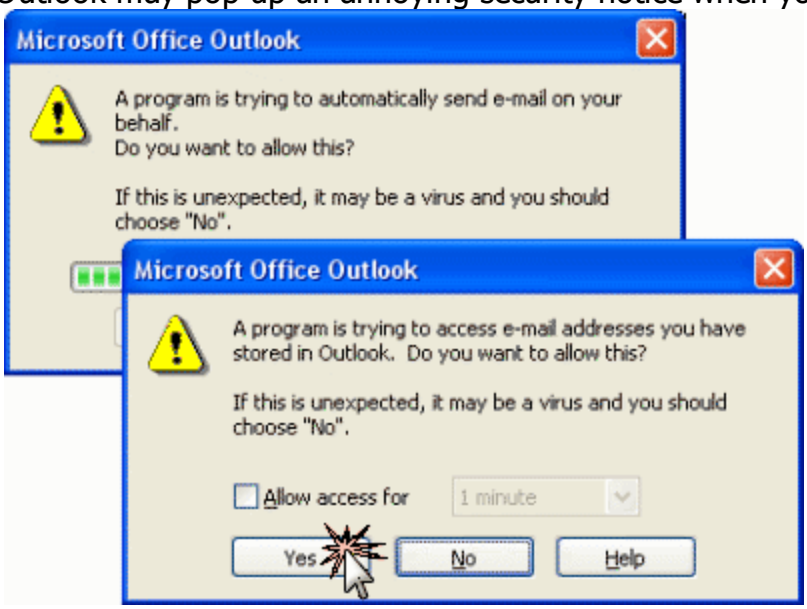
- You can check to see if licensed by selecting Help -> License
- If you would like to test this plug-in and do not have a license, include in your email request to *support@ayanova.com* the text from your Help -> License
- Only one license is needed for your database.

4. Outlook may pop up an annoying security notice when you import



- To allow OutlookSchedule to import, just checkmark the Allow Access and click on OK

- MAPILab creates the free utility **Advanced Security for Outlook** at http://www.mapilab.com/outlook/security/ that once installed will mean you won't have to do this every time.

  - Download the outlook_security.zip file from MAPILab or from the AyaNova Downloads web page
  - Extract the setup file and release notes from the zip file
  - Install the setup file and the second time you run the AyaNova OutlookSchedule, set to always allow access

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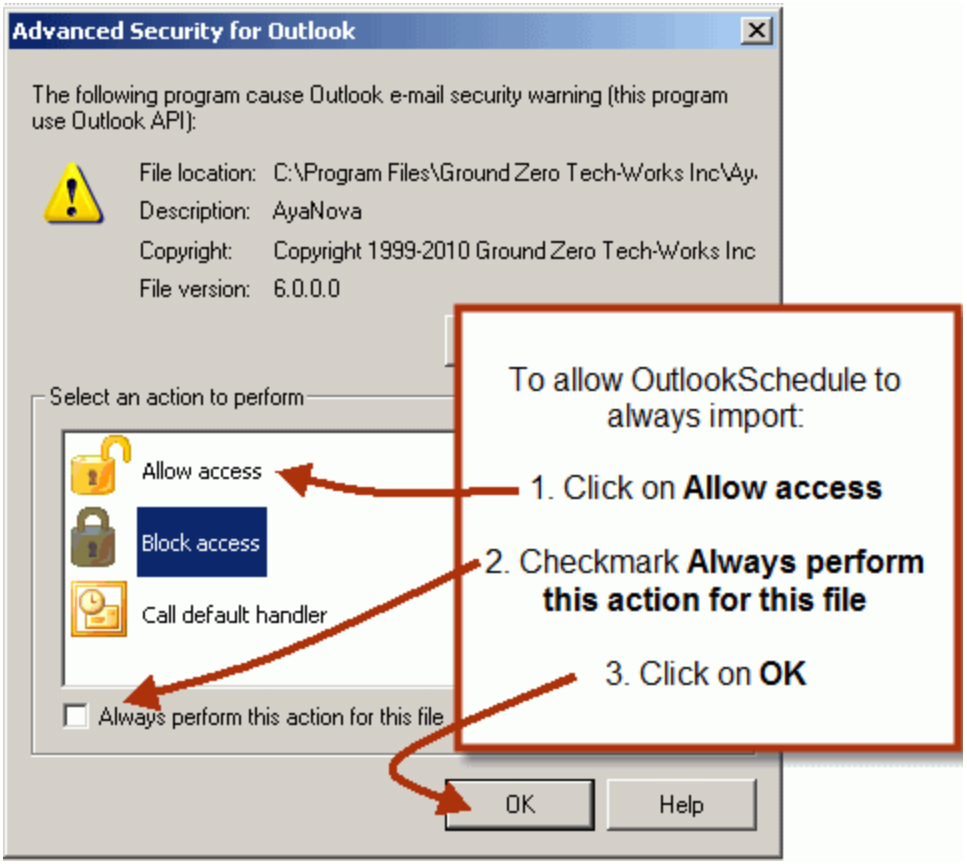

6.3.2 How to export scheduled items to Outlook

How to export your scheduled items into Outlook:

1. Install as per the installation instructions

2. In the example below, the Lite User has a number of scheduled workorder items and Schedule Markers on days throughout the month

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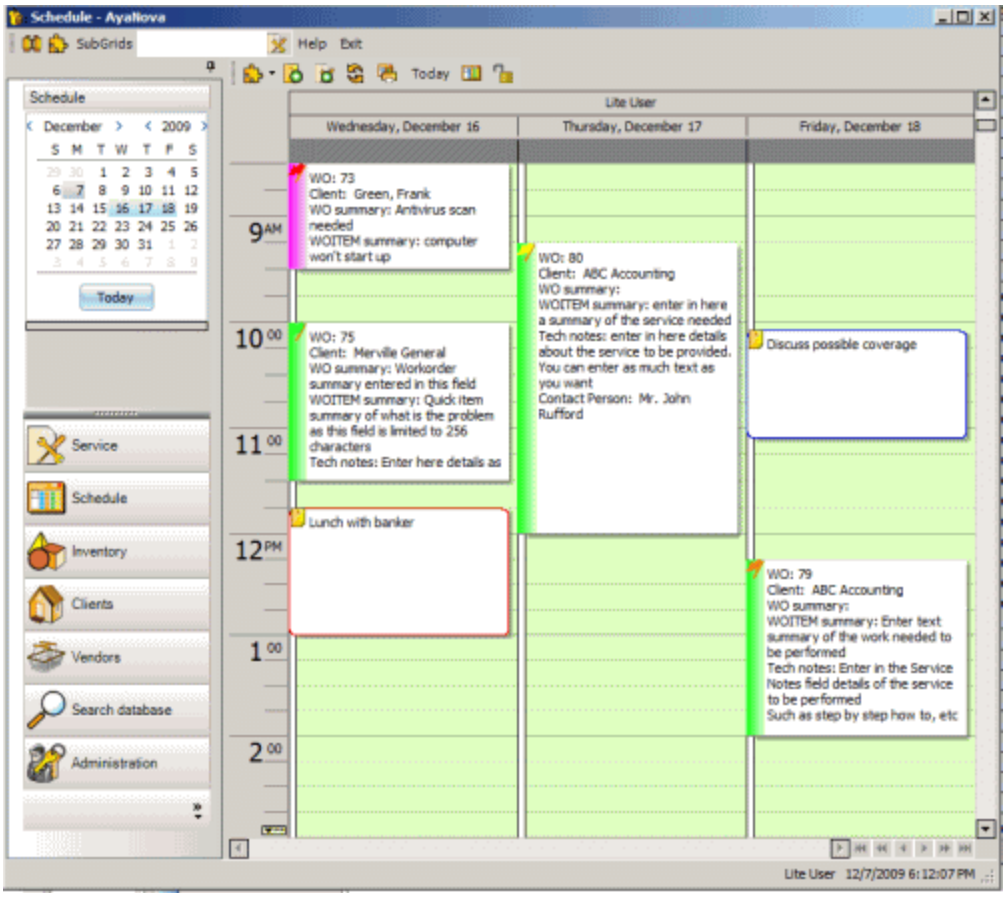
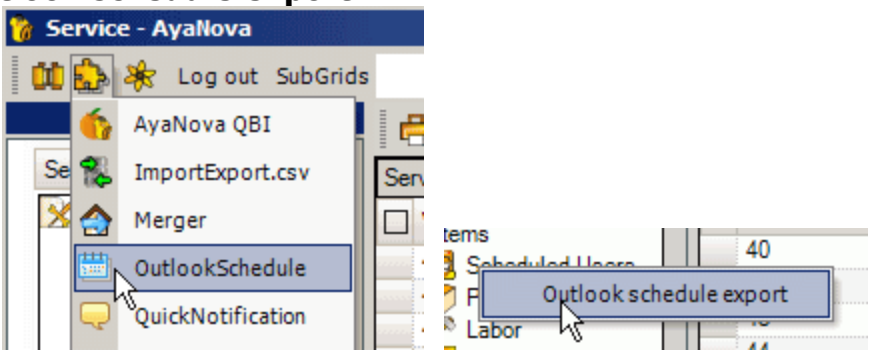


3. Drop down the main menu Plug-ins and select **OutlookSchedule** and then **Outlook schedule export**



4. The plug-in will create an Outlook calendar called AyaNovaSchedule and import all scheduled AyaNova Lite items for the Lite user into this Outlook calendar.

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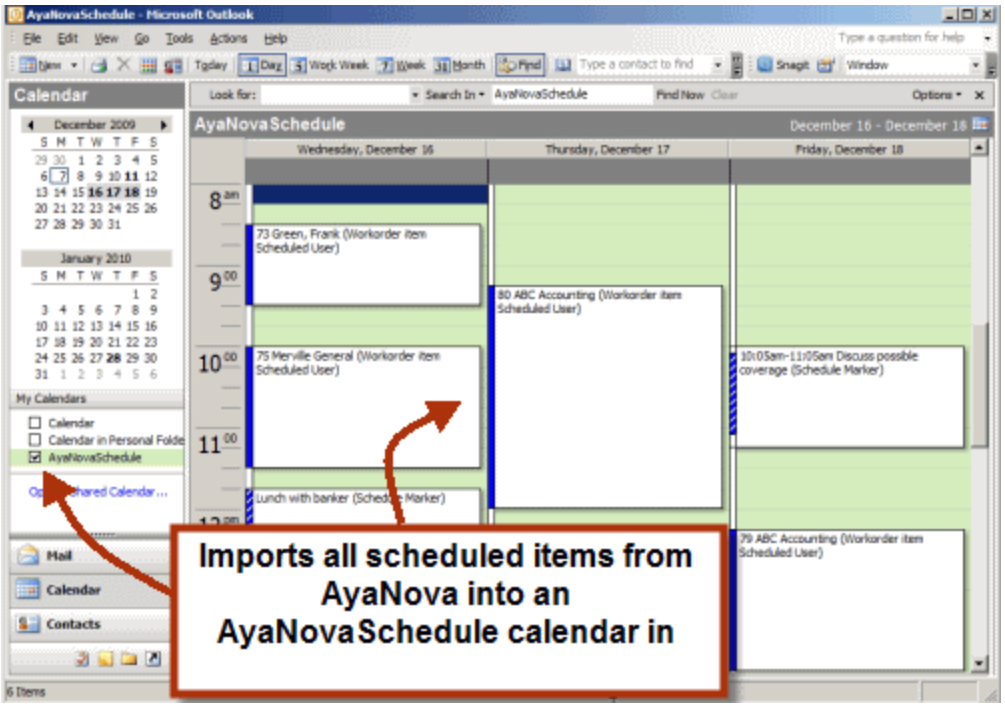

- Exports only scheduled items (Schedule Markers and workorder items)
- Exports only items occurring from time of export forwards (does not export previously scheduled items)
- Does not export Closed workorder items

5. Open an imported event in your Outlook to see what has been imported

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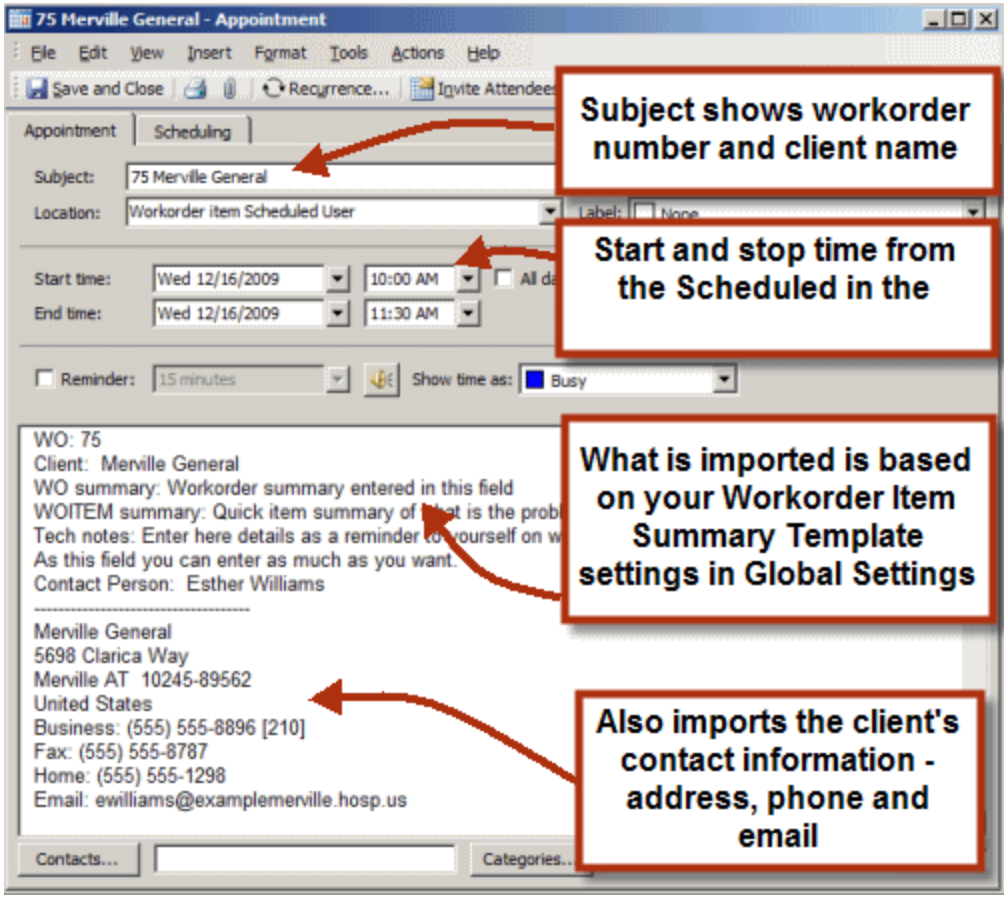

- The details imported in the Outlook event are based on the Workorder Item Summary Template set up in your Global Settings

- Plus also imports the client's contact information - address, business, fax and mobile phone numbers and the email address.

6. You can run the OutlookSchedule plug-in as often as you like.

   - When the OutlookSchedule plug-in is run, it compares the existing imported scheduled events between AyaNova Lite and the Outlook AyaNovaSchedule calendar. And if have changed, deletes the Outlook AyaNovaSchedule calendar events and imports again from AyaNova Lite so you always have the latest information in your Outlook AyaNovaSchedule calendar

   - If you have created new events in the Outlook AyaNovaSchedule calendar directly, these are not removed when you import again from AyaNova Lite - only those originally imported.

7. Outlook may pop up an annoying security notice when you import

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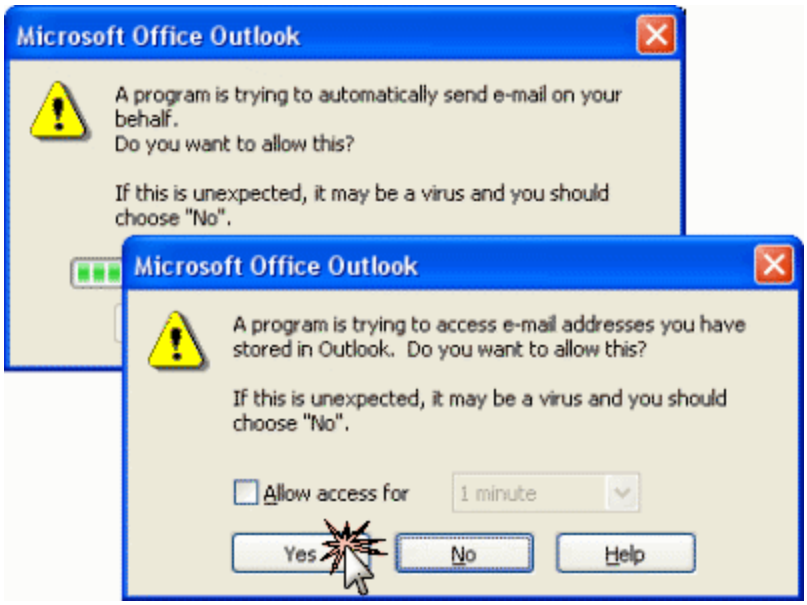

- To allow OutlookSchedule to import, just checkmark the Allow Access and click on OK

- MAPILab creates the free utility **Advanced Security for Outlook** at http://www.mapilab.com/outlook/security/ that once installed will mean you won't have to do this every time.

  - Download the outlook_security.zip file from MAPILab or from the AyaNova Downloads web page
  - Extract the setup file and release notes from the zip file
  - Install the setup file and run the AyaNova OutlookSchedule and set to always allow access

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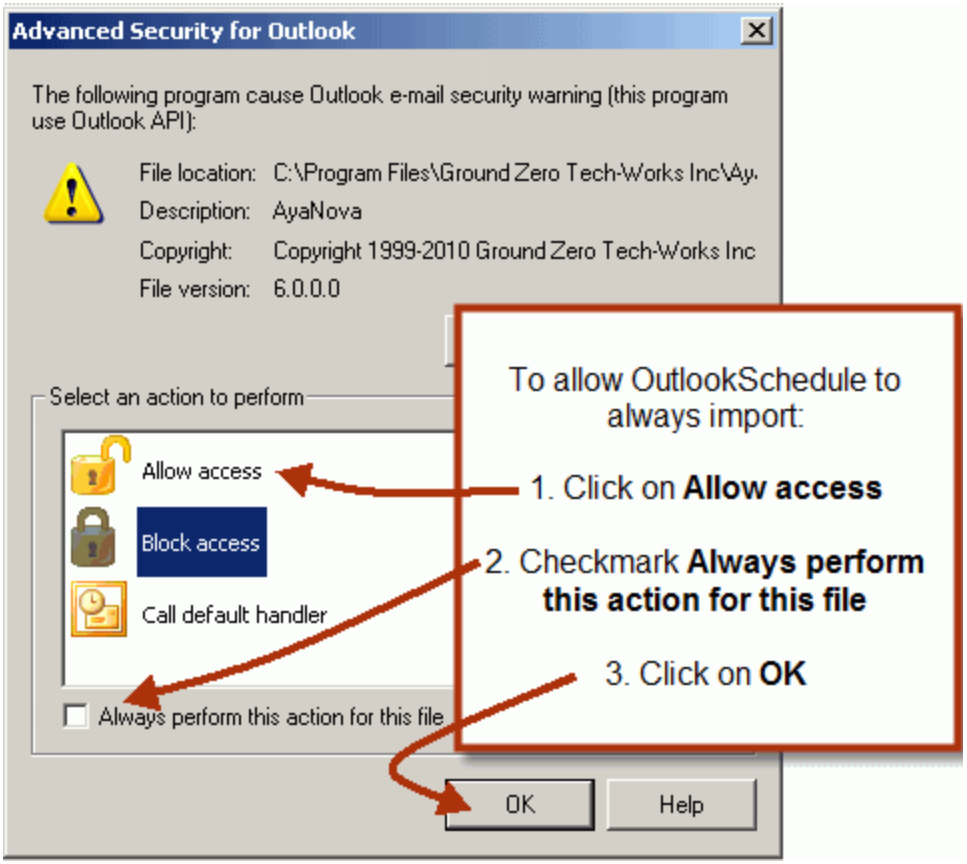

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6.4 XTools plug-in

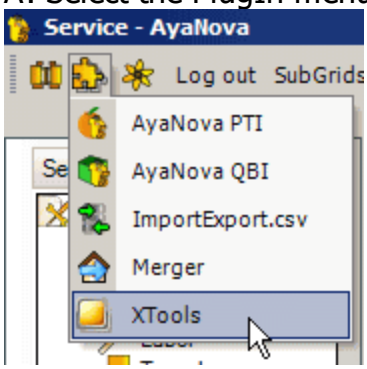
The XTools utility allows you to enter links to other programs, websites, etc to have quick access while within the AyaNova program. It can be configured two ways - either via the <Configure> option or directly via the XML file.

NOTE: What XTools display is based on the XML file in that specific computer's AyaNova program folder. It does not follow the AyaNova user.

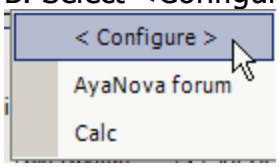
Two ways to configure:

1. Configure using the <Configure> option

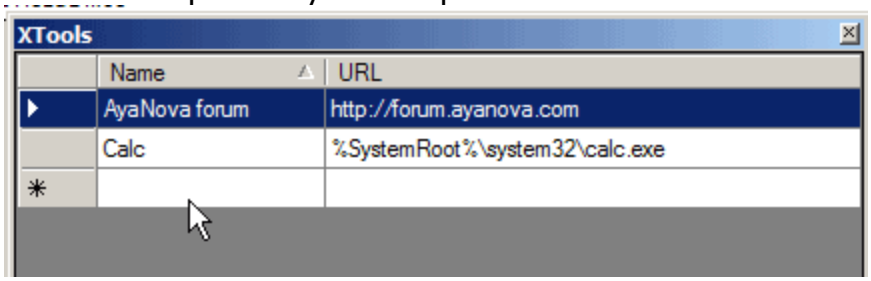
A. Select the PlugIn menu option on the main menu -> select XTools



B. Select <Configure>



C. Enter in a Name to display for the link you are entering, and enter in the URL either a path on your computer or a web URL



2. Configure by editing the XML file directly

A. Open Windows Explorer and move to the C:\Program Files\Ground Zero Tech-Works Inc\AyaNova\plugins\XTools folder

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B. Edit the xtools.xml file using NotePad

C. Refer to the existing entries as examples

Note: you can easily configure using the <Configure> menu option, and then copy the xtools.xml file to other computer's C:\Program Files\Ground Zero Tech-Works Inc\AyaNova\plugins\XTools folder if you want all users to have the same XTools configuration.

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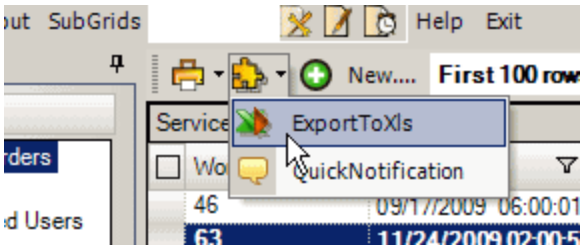
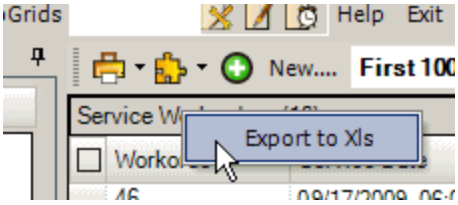
6.5 Export to XLS plug-in

6.5.1 Export To XLS





The **Export to XLS plug-in:**

- Export all records from a grid; or filter to show specific records to export; or select specific records to export
- Exports all columns available from that grid
- Exports in Excel BIFF8 format compatible with Excel 97 or newer, OpenOffice Calc or any other program that can read Excel 97 files.
- You don't need Excel or Open Office etc installed on your computer to be able to run this utility
- Fully accessible while trialing AyaNova; purchase if you would like to continue using when you go live
- The export column order **does not** follow the grid column order you are viewing so as to ensure every export is consistent in case the user has formulas etc that rely on column order
- The sort order **does** follow that in your AyaNova Lite grid

Export to XLS plug-in installation:

1. Download the Export to XLS setup file for your version from the Downloads web page
2. Install by running the setup file
   - The Export to XLS plug-in files will be installed to this computer in the C:\Program Files\Ground Zero Tech-Works Inc\AyaNova\plugins\ExportToXls folder
3. An Export to XLS database license is required

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- You can check to see if licensed by logging selecting Help -> License
- If you would like to test this plug-in, include in your email request to *support@ayanova.com* the text from your Help -> License or purchase via the Purchase web page.
- Only one license is needed for your database

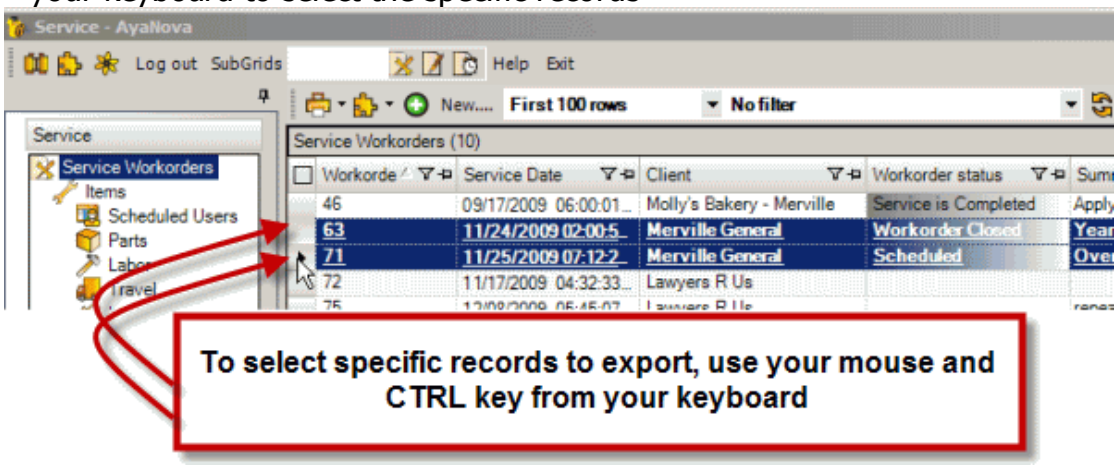
4. Refer to How to Export to XLS

6.5.2 How to Export to XLS

The Export to XLS plug in allows you to easily export record data to an XLS file for additional business analysis, import into other software, etc

How to export to an XLS file:

1. Install as per the installation instructions
2. View the grid you want to export from
   - If you want all records from this grid that are displaying, no need to select anything
   - If you want specific records, you can use your mouse and the CRTL key on your keyboard to select the specific records



   - Or you can filter to display specific records. Refer to the Filtering a grid section of this Help file for details on filtering

3. Select the **ExportToXLS** plug-in menu and select **Export to XLs**

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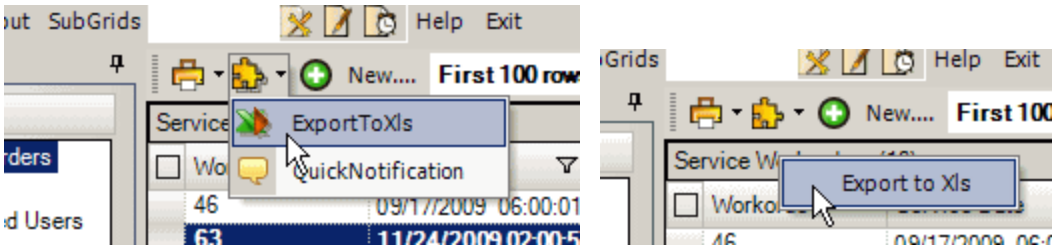
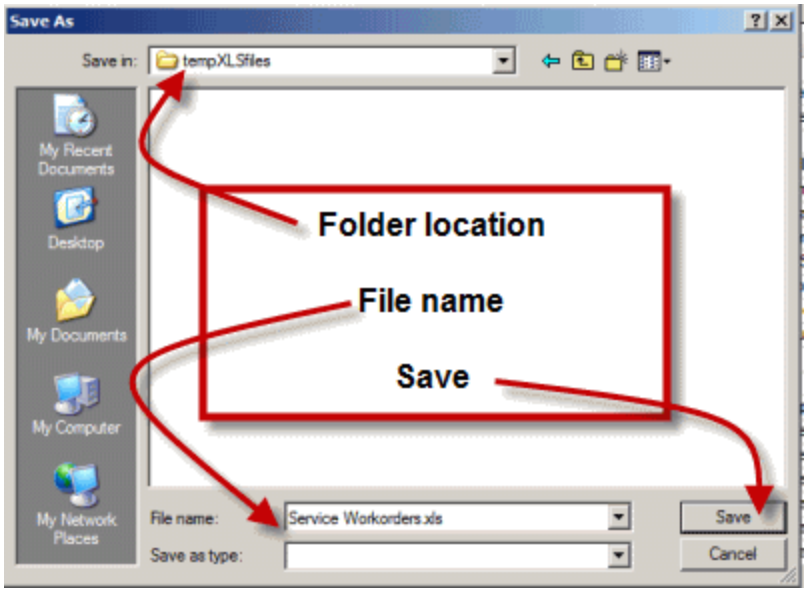
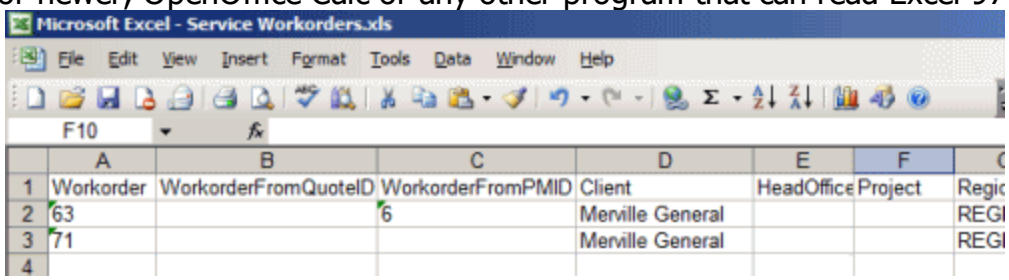


4. Accept the file name or edit as desired with the xls extension to a folder, and Save



5. The file will be saved to the folder you specified. You can open with Excel 97 or newer, OpenOffice Calc or any other program that can read Excel 97 files



- The sort order of the records does follow that from your AyaNova Lite grid. In the example screenshot above, workorder 63 was listed before workorder 71, so is in that order in the exported file
- The column order **does not** follow the grid column order you are viewing so as to ensure every export is consistent in case the user has formulas etc that rely on column order.

- It is encouraged that you export to an XLS file and view so that you can see the columns that are exported and their column order.

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The Export to XLS plug-in is available from the following grid menu's:

- All Service navigation pane grids
- Client grid
- Vendor grid
- Part grid

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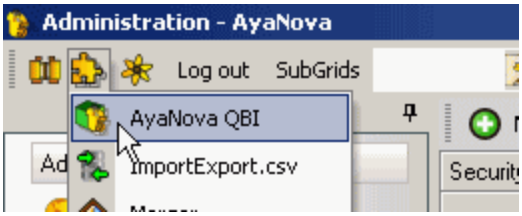
6.6 QBI - QuickBooks Interface



AyaNova QBI

QBI is the optional add-on that interfaces AyaNova and QuickBooks accounting software.

Please refer to the QBI Online Help file for requirements, installation, configuration and use.

A QBI license is required to use this optional plug-in

AyaNova QBI has the following features:

- Import clients, vendors and items from the QuickBooks company data file into the AyaNova database
- Import clients, vendors, parts and rates from the AyaNova database into the QuickBooks company data file
- Link existing AyaNova data with existing QuickBooks data
- Update existing linked parts information between AyaNova and QuickBooks
- Update existing linked client's information between AyaNova and QuickBooks
- Set linked parts pricing between the AyaNova database and the QuickBooks company data file during the invoicing act
- Export data from AyaNova service workorders into QuickBooks invoices
- Consolidate multiple AyaNova service workorders into one QuickBooks invoice
- Compatible with 64bit computers

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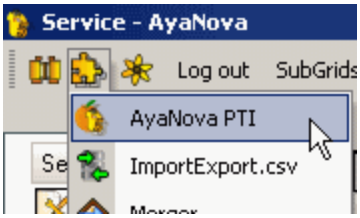
6.7 PTI - Peachtree Interface



AyaNova PTI

PTI is an optional add-on that interfaces AyaNova and Peachtree accounting software.

Please refer to the PTI Online Help file for requirements, installation, configuration and use.

A PTI license is required to use this optional plugin.

AyaNova PTI has the following features:

- Import clients, vendors and items from the PeachTree company data file into the AyaNova database
- Import clients and vendors from the AyaNova database into the PeachTree company data file
- Link existing AyaNova data with existing PeachTree data
- Synchronize linked parts pricing between the AyaNova database and the PeachTree company data file at the time of invoicing
- Export data from AyaNova service workorders into PeachTree invoices
- Consolidate multiple AyaNova service workorders into one PeachTree invoice

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Backup & Restore

7 Backup & Restore

7.1 Important information to review

Computer users fall into one of two categories:

- those who have already experienced a significant data loss
- and **those who will**

A backup of your data will enable you to get up and running again quickly in the event of database corruption, hardware failure, fire, theft or disaster.

The **costs of data loss can be quite high** not just in the time and money involved to re-enter information, but also customer dissatisfaction due to possible forgotten scheduled items whether workorders or preventive maintenance, as well as lost revenue.

Insurance can replace your computer but only a backup can replace your data. In a busy shop the value of the data can often exceed the value of all your computers combined; a backup is very cheap insurance.

The first step in developing a solid disaster recovery plan is to develop an idea of what constitutes an acceptable loss for your organization - the impact of losing data stored in your database.

Would you be able to recover from the loss of an hour's worth of data, a loss of 24 hours worth of data, a loss of a week of data, etc?

If you are running a small service shop with a couple of new or edited service workorders a day, re-entering that data from paper printout for any data loss in the last 24 hours may be acceptable.

Whereas if you are a huge service company, managing 1000's of new and edited service workorders a day, a loss of entered data of more than 60 minutes may be at most acceptable.

The second step is to consider the loss of access to the database itself.

What would be the result if your users were not able to access information for an extended period of time?

If you were running a small service shop with a couple of scheduled service workorders that you had already printed out dispatch reports for, a day's loss of access may be acceptable.

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Whereas if you were a huge service company, managing 1000's of scheduled service workorders for that day, a loss of an hour may be acceptable.

Determining these acceptable levels will help you determine the type of backup you should provide for your data.

A small service company may invest in a tape drive with a backup performed ever night, and a 10 tape rotation

Whereas a large service company may invest in a retained 24 hourly snapshot, a nightly backup, a RAID system and a mirrored server.

If you have a question regarding the backup of your data, you want to have it answered before you need your backup. We do recommend highly that you contact your local computer support centre for available hardware and software options for your needs. Be sure to test your backup and restore on a regular basis.

Minimum backup recommendation

A snapshot of your database at a point in time is taken, and this snapshot is backed up (copied) onto a backup device. In the event of database loss, the snapshot is restored so it can be accessed and reintegrated into the database.

We recommend at minimum an automated daily tape backup using a standard 10 tape rotation system of a full snapshot of your database.

Incremental and differential backups are not recommended. We recommend full backups so that the complete database can be restored.

An automated backup ensures that you don't forget to do a backup as it will run automatically every night. You only have to remember to change the tape.

A 10-tape rotation consists of 10 tapes labeled and used as follows: Monday, Tuesday, Wednesday, Thursday, Friday1, Friday2, Friday3, Month1, Month2, Month3.

You use each tape in sequence and rotate through the Friday and monthly tapes in order. With a 10-tape rotation you can restore from as recently as the night before or up to 3 months previously.

This is important because a tape can go bad and not be restorable or you could delete something critical and not notice it for some time or corruption could have occurred many days previous, but not be immediately noticeable.

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Your backup software should be configured to compare the tape immediately after backup to the data on the hard drive and report the success or failure of each night's backup. You should make a point of checking your backup log each morning to ensure it's working properly.

Each day you **must take the tape from the night before off site** for protection in the event of a fire or theft. This is commonly overlooked. A tape left beside the computer is no backup at all.

Burning data to a CD is good protection but it must be done on a regular basis. You can only restore data from your most recent backup and if too much time goes by between backups it can mean a lot of manual re-entry.

Insurance can replace your computer but only a backup can replace your data. In a busy shop the value of the data can often exceed the value of all your computers combined and a tape backup is very cheap insurance.

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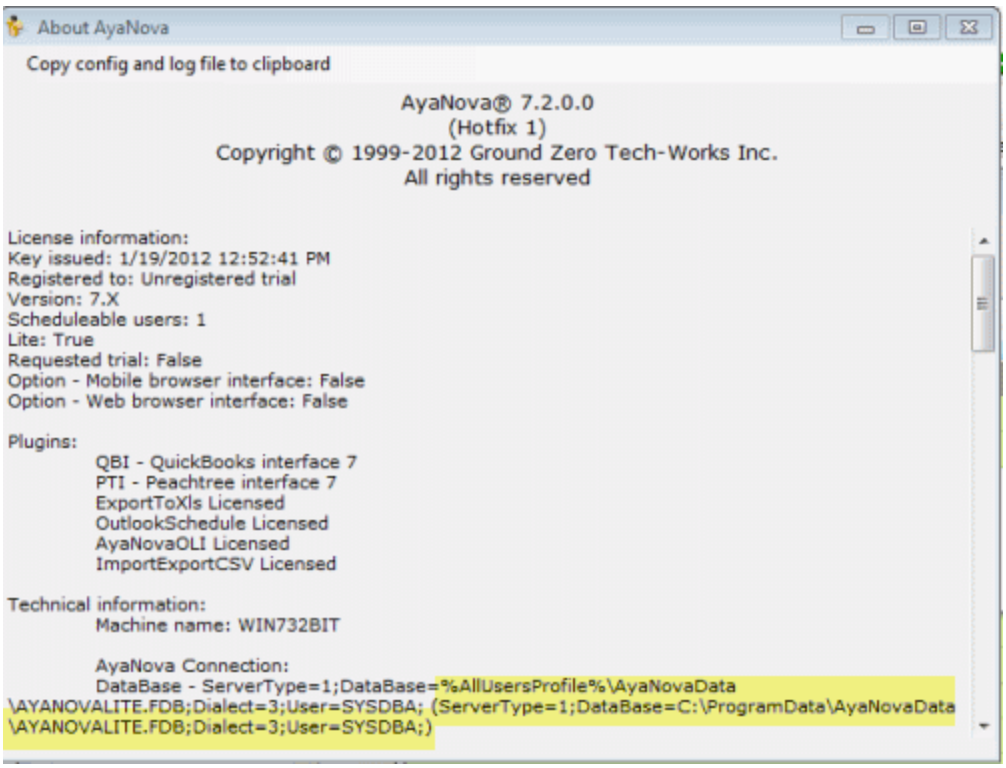
7.2 Backup

Backup for AyaNovaLite

1. Load your AyaNova Lite

2. View the main menu Help -> About AyaNova

3. Identify what your AyaNova Lite database is named and where it is located by viewing the AyaNova Connection: section



4. Exit out of AyaNova

5. Backup your database file from your location to your backup device (i.e. CD, REV, backup tape, etc)

In the screenshot above, our database file is called AYANOVALITE.FDB and is located in the C:\ProgramData\AyaNovaData folder.

The database file is by default located in the folder **%AllUsersProfile% \AyaNovaData**

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- On a Windows 7 and newer, %AllUsersProfile% is usually **C:\ProgramData**
- On an older OS such as XP or 2003 computer, %AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**

6. Confirm the database file is now on your backup device
7. You are done.

The AyaNovaLite database file **AYANOVALITE.FDB** holds all of your data, as well as your license. And the **AYANOVALITE.FDB** database file is the only file that needs to be backed up when using AyaNovaLite.

NOTE: Do **not** access the database when the backup is being performed (i.e. do not run the AyaNova program, or access the database directly when the backup is being performed)

NOTE: If your situation is such that the AyaNova database must be accessed and running on a continuous basis, you will want to move to the full AyaNova and configure for network access so that you can use the network backup steps with a network configured AyaNova database.

If you do not have a backup device, contact your local computer center to discuss what would be needed to backup your important data on a regular basis.

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7.3 Restore

Restoring for AyaNovaLite

How you restore depends on the situation.

Situation 1: The AyaNovaLite program is still installed, but an issue with the database requires restoring from backup:

1. Make sure that the AyaNovaLite program is shut down
2. Rename the existing database to **AYANOVALITE.FDB.BAD** in the AyaNova database folder **%AllUsersProfile%\AyaNovaData**
   - On a windows 7 and newer computer, %AllUsersProfile% is usually **C:\ProgramData**
   - On an older OS such as an XP or 2003 computer, % AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**
3. Restore the backed up **AYANOVALITE.FDB** file to this exact same folder where you just renamed
4. Log in via the AyaNova program and confirm successful

Situation 2: Computer has no previous AyaNovaLite installation (clean installation such as you are replacing your existing computer)

1. Download the AyaNova installation file from the AyaNova web site http://www.ayanova.com/download.htm
2. Perform the installation
3. Log in and ensure program installation successful (*yes, this installs the full AyaNova version trial database, the following steps deals with that*)
4. Exit out of the AyaNova program
5. Rename the existing AYANOVALITE.FDB trial database file that is in the folder folder **%AllUsersProfile%\AyaNovaData** to **AYANOVALITE.FDB.TRIAL**

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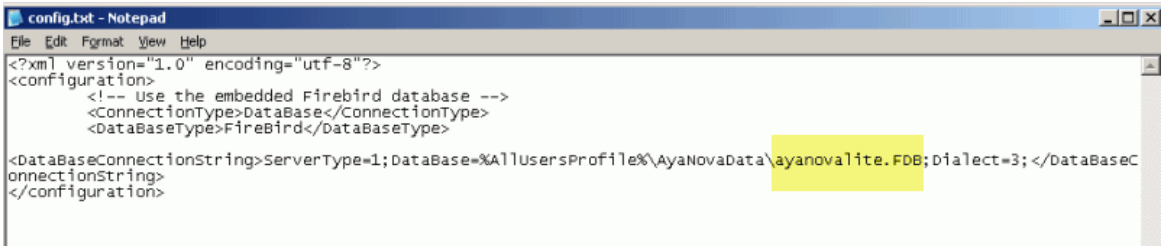
6. Restore the backup **AYANOVALITE.FDB** to folder **%AllUsersProfile %\AyaNovaData**
    - On a windows 7 and newer computer, %AllUsersProfile% is usually **C:\ProgramData**
    - On an older OS such as an XP or 2003 computer, % AllUsersProfile% is usually **C:\Documents and Settings\All Users\Application Data**
7. This restores all your data as well as your licenses as both are in the database file
8. Use NotePad to open the config.txt file in the AyaNova program folder (C:\Program Files\Ground Zero Tech-Works Inc\AyaNova) and edit the database name from AYANOVA.FDB to AYANOVALITE.FDB Exit and save the file.



9. Log in via the AyaNovaLite program and confirm successful

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Updating to latest version

8 Updating to latest version

Steps to update to the latest AyaNova 7

1. **Requirements before proceeding**
2. **Create backup of your AyaNova database**
3. **AyaNova 7 installation**
4. **Apply your AyaNova subscription license(s) Activation Key and update your database**
5. **Install and configure AyaNova 7 optional plugins**
6. **Confirm your backup and restore procedure**

1. Requirements before proceeding

Do not proceed until you have answered yes to each of these requirements:

a) **Have you purchased your AyaNova Lite 7 subscription license(s)**?
- AyaNova 7.4 and newer requires subscription licensing
- See answers to common questions about licensing, pricing, purchasing on https://www.ayanova.com/purchase.htm

b) **If upgrading from version 6 or older, have you confirmed that your report templates that you normally use work successfully with the latest version?**
- Export each report template to a file (same steps for older versions as for 7.x
- Download and install AyaNova 7 on a separate stand-alone computer with a sample database, toggle to Lite.
- Import your custom report templates to your stand-alone trial AyaNova
- Test
- If you require replacement sample report templates, obtain via https://www.ayanova.com/reporting.htm#replacement

2. Create backup of your AyaNova database and config file

a. Make sure all AyaNova related programs connecting to the database are shut down fully.

b. Make a backup of your AyaNova Lite database

c. Make a backup of your **config.txt file** from your server's AyaNova program folder so that you can refer to it/copy back if needed in steps further down

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3. AyaNova 7 installation

Either follow 3.A **or** 3.B below.
If you encounter an issue following B, then restore and start from step 1 this time following A when get to this step 3

3.A. Remove all AyaNova programs from the computer -> install stand-alone -> copy back config.txt if overwrote

a. Make sure your AyaNova program is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

b. It is recommended to uninstall any previous AyaNova programs via Control Panel -> Add/Remove Programs before installing a new version

- Uninstall plugins if installed OLI, OutlookSchedule, ExportToXLS, QuickNotify, AyaScript
- Uninstall AyaNova
- if option to delete installed databases is displayed, select **No**.

c. Download the latest AyaNova 7 setup file from
https://www.ayanova.com/download.htm

d. Install as per the AyaNova Lite installation steps

- If option to overwrite config.txt file, select **No**.

e. Continue with step 4.

OR

3.B. Install over top of existing AyaNova desktop program

a. Make sure your AyaNova program is shut down unless specifically identified to run. Failure to do so will result in needing to restore from backup and performing the steps again.

b. Download the latest AyaNova 7 setup file from
https://www.ayanova.com/download.htm

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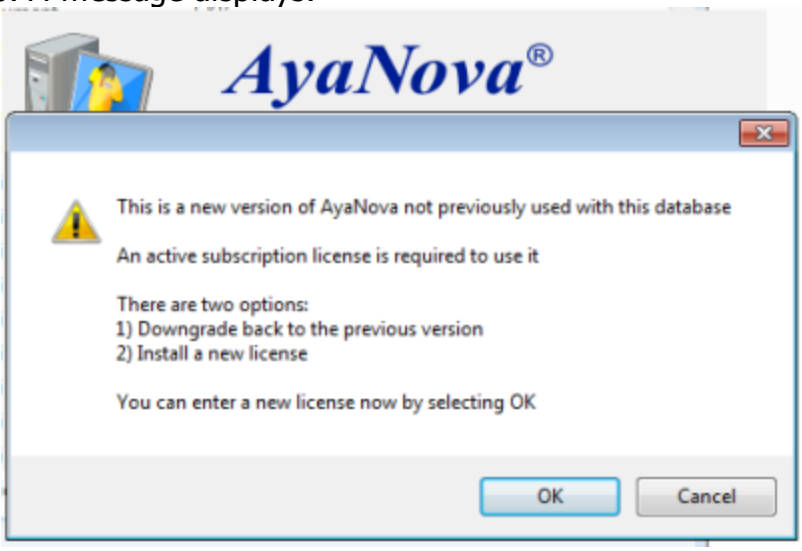
c. Install taking the check-marked previous selections that are already selected - this is OK, as long as you do not run before stated to do so

d. Continue with step 4.

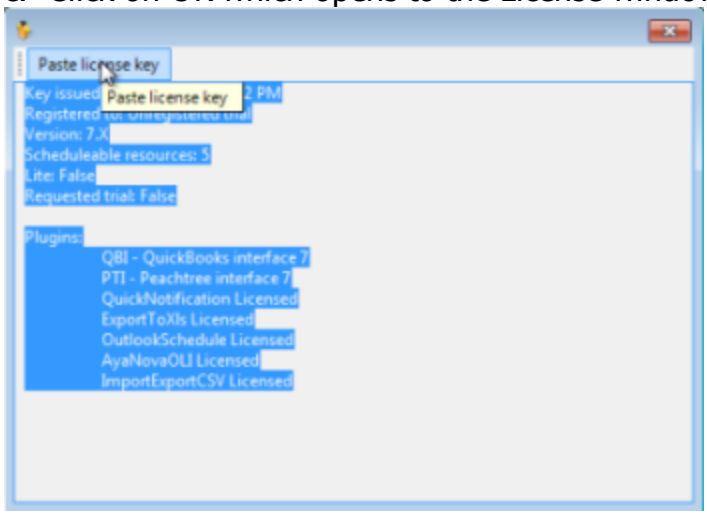
4. Apply your AyaNova subscription license(s) Activation Key and update your database

a. Run the AyaNova 7 desktop program on your computer

b. A message displays:



c. Click on OK which opens to the License window so you can apply



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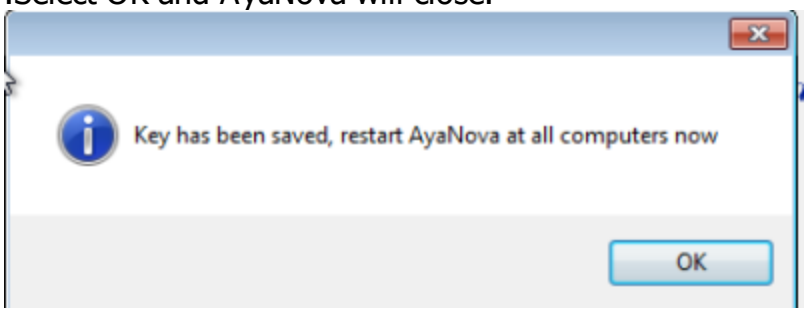
d. Copy all of the text from your AyaNova Lite 7.4 or newer subscription license(s) Activation Key (this automatically copies to your computer's clipboard so you can paste)

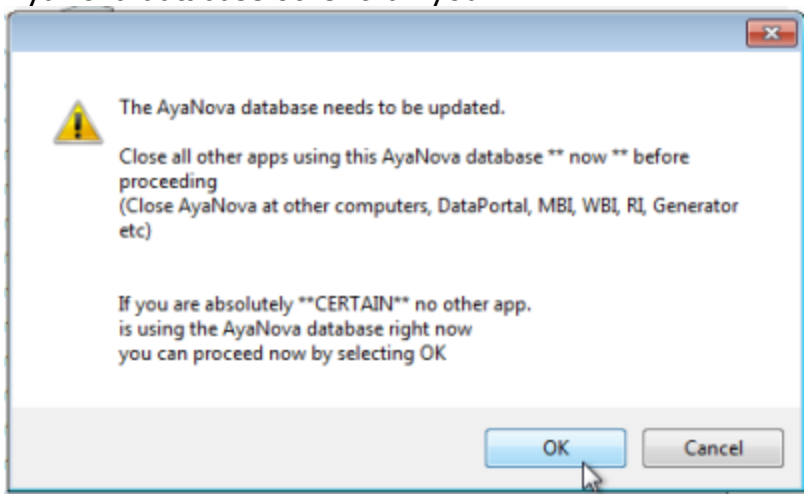
e. Select Paste license key

f.Select OK and AyaNova will close.



g. We are not done yet! Run the AyaNova 7 program again.

h. As per the message, make sure no one and nothing else is accessing the AyaNova database other than you.



i. Schema update won't take long - let it finish!

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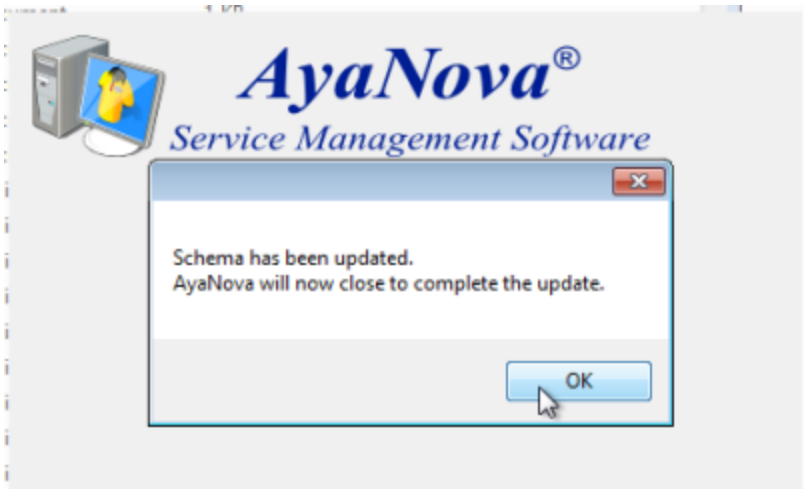

j. Check your Help -> About AyaNova to confirm your licenses and to confirm your version.

k. Exit out of AyaNova 7

5. Install and configure your licensed AyaNova Lite 7 optional plugins (i.e. ExportToXLS, OLI, OutlookSchedule)

6. Confirm your [backup and restore procedure]

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End User Software License

9 End User Software License

END-USER SOFTWARE LICENSE AGREEMENT

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11. Governing Law. This Agreement and the relationship between the parties will be interpreted according to the laws in force in British Columbia, Canada. The courts of British Columbia will have jurisdiction over all claims, disputes, and actions related to this Agreement, and the parties attorn to the jurisdiction of those courts.

12. Enurement. This Agreement will bind and enure to the parties hereto and their respective lawful successors and permitted assigns.

13. Entire Agreement. This Agreement forms the entire agreement between you and Ground Zero and there are no agreements collateral to this Agreement. This Agreement supercedes all prior written,

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14. Assignment. Only Ground Zero may transfer or license any of its rights under this Agreement. You may not license any of your rights under this Agreement, but you may transfer the Software and Documentation to another user if you transfer all of your rights under this Agreement to that new user, cease using all the Software and Documentation, erase and destroy all copies you have of the Software or Documentation, ensure the new user agrees to the terms and conditions of this Agreement, and provide Ground Zero of all these transfer agreements via signed and dated letterhead from both parties. Administration fees will be charged for replacement license keys required.

15. Severability. If any provision of this Agreement is held to be invalid, illegal or unenforceable, the validity, legality and enforceability of the remaining provisions will not in any way be affected or impaired.

16. Further Assurances. You will execute and deliver to Ground Zero any additional documents and take any additional steps that may be required to give full effect to the intent expressed in this Agreement.

17. Notice. All notices and other communication to Ground Zero must be made in writing and delivered to Suite #310 1434 Island Hwy, Campbell River, BC Canada V9W 8C9 or e-mailed to legal@ayanova.com.

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