



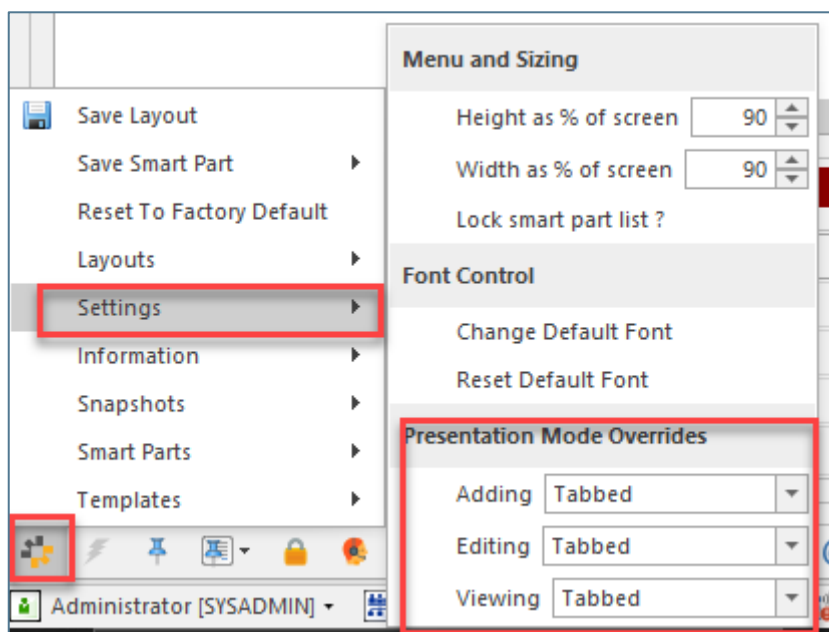
Intro & Navigation

Webinar Q&A's

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1. How do you create Tabs?

To create tabbed views for your transactional screens – select the Intact logo on the bottom left of the screen i.e. Sales orders > Select settings > Change the settings within the Presentation mode overrides section to 'Tabbed'



2. How can I create a scheduled sales report on a daily basis let's say at 6 am?

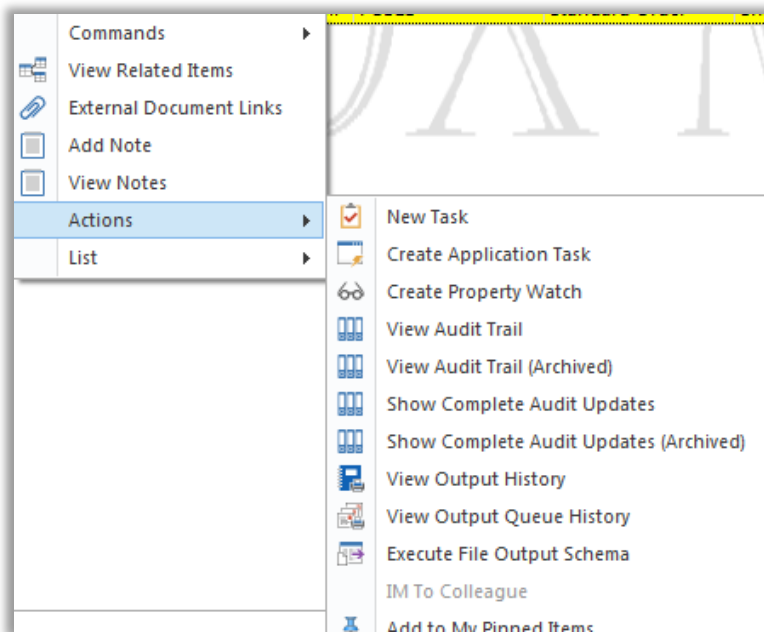
In Intact iQ, nearly every master object, i.e. Customer, Supplier, Product, Lead, Prospect, etc. and every transaction type, i.e. Sales Quotation, Sales Order, Purchase Requisition, Purchase Order, Purchase Invoice, etc. can have a Workflow Status assigned to it.

A Workflow Status is a convenient method of controlling the flow of an object from initial recording to final approval for acceptance into Intact iQ. In the case of a transaction, a Workflow Status can be used to track the various stages of its processing from initial logging to completion. In the case of customers and suppliers, a Workflow status could be used to identify active accounts from dormant accounts.

Intact iQ also has a Transaction Authorisation Request facility which can only be setup where the Agility Module has been purchased. Workflow Statuses reduces the need to use this facility for every transaction.

Workflow Statuses can be a component of the overall Security Policy implemented by a company.

Executing the Create Application Task command



3. Is there an easy way to find what columns are called?

You can hover your mouse over a field or column to get the name.

4. Are all of the features demonstrated available on all versions of Intact iQ?

Most functionality we showed is standard other than our Analyst module. If you interested in finding out more about our integrated analytics tool, Analyst please click [here](#).

But a number of features like changing ribbon, add field to filter, etc. are in more recent versions of Intact iQ.

5. Jessica, thank you for your informative Webinar. I notice that your screens appear newer than ours, we had a very recent upgrade, but the screens look older. Can we get the new layout?

We'll be covering the customisation of your ribbon commands in the next webinar. Following that if you do require further assistance please contact us to discuss your requirements further – info@intactsoftware.com

6. Would like to have information to have the info tab

Instructions are attached in this email.

7. When you link a file to a product, like an image or data sheet for example. does this file export with the product information when you export? '

If you mean export to Excel, then No.

8. Hi, when individual users customise their screen layouts e.g. changing columns displayed, or re-naming columns would they always revert to default layout after a software upgrade? (assuming the customizations are kept each time you log off)

All your saved customisations are retained on upgrades.