

September 2010

# Tip of the Month

## New Top Menu System Available in 7.0

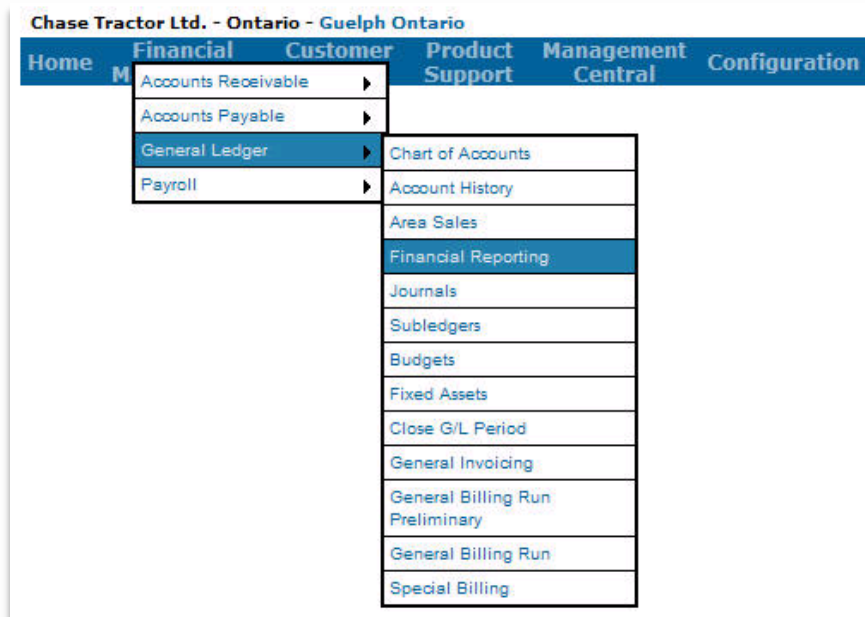
Available with IntelliDealer release 7.0 is an alternative top-level menu system. Here are its key features:

### Quick navigation:

As you hover over the main navigation headings (e.g., Financial Management), the system will drop down a menu showing the sub-modules. As you hover over the sub-modules, the various applications are shown and can be accessed by clicking on them. The advantage is that any menu option can be accessed with just one click.

Figure 1 shows an example of what the new menu looks like while navigating to “General Ledger >> Financial Reporting” link.

Figure 1



### Click to expand all:

Clicking on the main navigation headings at the top (e.g., Financial Management) will expand all menu options (Figure 2), again making it easy to access the menu option:

Figure 2

| Chase Tractor Ltd. - Ontario - Guelph |                      |                         |                 |                                 |               | Support              |
|---------------------------------------|----------------------|-------------------------|-----------------|---------------------------------|---------------|----------------------|
| Home                                  | Financial Management | Customer Care           | Product Support | Management Central              | Configuration | Administration       |
| <b>Accounts Receivable</b>            |                      | <b>Accounts Payable</b> |                 | <b>General Ledger</b>           |               | <b>Payroll</b>       |
| Customer Profile                      |                      | Vendor Profile          |                 | Chart of Accounts               |               | Employee Profile     |
| Customer Reports                      |                      | A/P Outstanding         |                 | Account History                 |               | Direct Deposit       |
| A/R Outstanding                       |                      | Vouchers                |                 | Area Sales                      |               | Check Reconciliation |
| A/R Reports                           |                      | Purchase Orders         |                 | Financial Reporting             |               |                      |
| Credit Limit Analysis                 |                      | Adjust Outstanding      |                 | Journals                        |               |                      |
| Cash Receipts                         |                      | Check Run               |                 | Subledgers                      |               |                      |
| Authorization Maintenance             |                      | Month End               |                 | Budgets                         |               |                      |
| Apply Late Charges                    |                      | Check Reconciliation    |                 | Fixed Assets                    |               |                      |
| Statements                            |                      | A/P Reports             |                 | Close G/L Period                |               |                      |
| Month End                             |                      |                         |                 | General Invoicing               |               |                      |
| Invoice History                       |                      |                         |                 | General Billing Run Preliminary |               |                      |
|                                       |                      |                         |                 | General Billing Run             |               |                      |

**Customize the order of the menus:**

If you click on a sub-module (e.g., hover over Financial Management then click on General Ledger) the following window (Figure 3) will be displayed, allowing you to customize the order of the applications.

Figure 3

| General Ledger      |      | Results to display: 10 |
|---------------------|------|------------------------|
| Description         | Move |                        |
| Chart of Accounts   | ↓    |                        |
| Account History     | ↑ ↓  |                        |
| Area Sales          | ↑ ↓  |                        |
| Financial Reporting | ↑ ↓  |                        |
| Journals            | ↑ ↓  |                        |
| Subledgers          | ↑ ↓  |                        |
| Budgets             | ↑ ↓  |                        |
| Fixed Assets        | ↑ ↓  |                        |
| Close G/L Period    | ↑ ↓  |                        |
| General Invoicing   | ↑ ↓  |                        |
| ( 1 - 10 Of 13 )    |      | Next >                 |

Close


**Navigation menu is always on top:**

As you scroll down the page, you will immediately notice that the navigation menu remains visible at the top. This means you won't have to scroll back up to the top of the page to get to the navigation links.

### Activating the new menu system:

The new menu system is controlled via a security switch located in system number 995 – User Security (Figure 4). The switch for “Maximized Header” has been changed to “Header Style”. This is now a drop-down with three choices. To use the new menu system, set the “Header Style” to Single.

Figure 4



| Authorization List For User Security |   |
|--------------------------------------|---|
|                                      | Function  |
| <input checked="" type="checkbox"/>  | Access Printer Output                                   |
| <input checked="" type="checkbox"/>  | Allow Change Of Other Users Printer Output              |
| <input checked="" type="checkbox"/>  | Access Writers  |
| <input checked="" type="checkbox"/>  | Access Click To Call                                    |
| <input checked="" type="checkbox"/>  | Allow UEM To Change Expiration Date On Used Evaluations |
| <input type="checkbox"/>             | Log User Activity                                       |
| <input checked="" type="checkbox"/>  | Allow Access To File Uploads                            |
| <input checked="" type="checkbox"/>  | Allow Access To Equipment History                       |
| <input checked="" type="checkbox"/>  | Allow Access To Invoice History G/L Details             |
| <input checked="" type="checkbox"/>  | Allow Customer Quick Add                                |
| <input checked="" type="checkbox"/>  | Allow Equipment Quick Add                               |
| <input type="checkbox"/>             | Restrict Invoice Type Selection                         |
| <input type="checkbox"/>             | Header Style  |
| <input type="checkbox"/>             | Receive Completion Message For Batch Jobs               |
| <input type="checkbox"/>             | Allow Viewing Of Other Users PDF/Printer Output         |
| <input checked="" type="checkbox"/>  | Show Equipment Reference Amount                         |

**Note:** If desired, the original menu system (available in R6V07 and prior) can still be used by choosing Min or Max. Please refer to the online help system for additional information regarding these options.