

EVE (Electronic Virtual Employee) **User's Guide**

Integrated Scuba Systems
www.evediving.com

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1 INTRODUCTION

EVE is a revolutionary computer software program designed to assist the dive professional in today's competitive market. EVE provides an end-to-end solution for dive centers and resorts, which allows you to maximize profit and save valuable time by keeping an up to date record of business transactions. Once the records are in place, EVE can start her magic through reporting on and analyzing your business operations. This program really does bring profit to your fingertips. Integrated Scuba Systems (ISSYS / EVE Diving) designed this program specifically for the diving industry.

The information stored in the comprehensive EVE database can be exported to other programs within the Microsoft framework.

The application is modular - you can choose to display and use modules that are relevant to your business - making EVE easy to learn and easy to use.

EVE will grow with you. You can start by running EVE on a single computer. Later, you can run EVE on multiple computers connected by a Local Area Network in the store. When you expand to take on more than one store, you can run EVE in the cloud in multi-store mode.

1.1 Getting Help

While the EVE system is designed to be both intuitive and easy to use, we recognize that everyone needs a little help once in a while. We've made it easy for you to get the help you need.

1.1.1 EVE Manual

This manual is available as a resource for you to reference both during system set up and for ongoing use. Print in out or access it in EVE by clicking on the **Help menu** to open this file at the contents page.

1.1.2 Support

For help in using this product, or for more information about Integrated Scuba Systems software and other products, we invite you to contact Integrated Scuba Systems technical support. You can contact us at:

Email: support@evediving.com (preferred method of contact)

Web: <https://evediving.com>

2 GETTING STARTED

2.1 System Requirements

EVE is a 'Client/Server' program. I.e. there are 2 components to the program:

1/ the server: this controls your database and will be installed on one computer only.

2/ the client: this is the EVE program itself that you can use on multiple computers. Each client component needs to have a permanent connection to the server - i.e. using a wired or wireless network to connect the computers together.

Computers running the client must meet at least the following minimum requirements to run EVE:

Component	Specification
Processor	Pentium 1GHZ
RAM (Random-Access Memory)	1GB
Windows	Windows 10

Computers running the server must meet at least the following minimum requirements to run EVE:

Component	Specification
Processor	Pentium 1GHZ
RAM (Random-Access Memory)	1GB

EVE can import data from the following:

- ❖ EVE 4.2 and 4.3
- ❖ PADI customer and certification data files (these can be downloaded from the PADI Pros website by clicking Resort and Retailer on the Toolbox menu and then using the EVE Data link in the ISSYS/EVE section)
- ❖ Microsoft Excel

EVE can export data to the following:

- ❖ QuickBooks from Intuit
- ❖ Microsoft Word
- ❖ Microsoft Excel
- ❖ Microsoft Outlook
- ❖ ASCII text file
- ❖ MailChimp

2.2 Installing EVE

EVE comes delivered with an easy to use installation process. To install EVE:

- ❖ Make sure all other programs are shut down
- ❖ Download EVE from our web site (<https://evediving.com/page/downloads>), run the setup program that you downloaded.
- ❖ A setup form will be displayed with 2 main buttons: **Install EVE Server** and **Install EVE Client**.

As mentioned earlier, EVE is a Client/Server program, which means there are 2 distinct parts to the program - the Client and the Server.

The Server is where all of your data will be held. This component is only included in the setup for historical reasons. If you are installing EVE today, your database will be hosted on our servers in the cloud and there is no need to install the server component.

The Client is the EVE program you will use on a day-to-day basis. You can install the Client on the same PC as the Server if you wish. Alternatively, if you have a network, you can install the Client on several computers on the network.

2.2.1 Installing the EVE Server Components

NOTE: as mentioned above, the EVE Server component is not required for new installations as your database will be hosted on our servers in the cloud. This section is only present for special cases where long-time users of EVE have a local database.

To install the server component you need to be logged on to Windows as an Administrator. This is only while installing - you do not need to be an Administrator to run EVE.

The first thing you need to do is decide which computer to install the Server component on. If you want to install it on the computer you are currently using, click the **Install EVE Server** button and then follow the on-screen instructions. The setup program will check your computer for shared components that might already be installed (e.g. common files from Microsoft, etc. that might already be present on your computer). If it finds you do not have them it will install these 'pre-requisites' for you; if it finds they are already installed it will just continue. These pre-requisites include Microsoft SQL Server Express and Microsoft .Net Framework 4.5.2.

Once all the pre-requisites are in place, the setup will install the EVE specific components: EVE Database Utilities (a program that administrators can use to backup the database and perform other system tasks) and 2 EVE databases - the 'live' **eve** database that you will use on a day-to-day basis and a second database called **eveTraining** that contains pre-loaded test data you can use for staff training and familiarization with the program.

The setup may take some time depending on whether the pre-requisites need to be installed or not. Please be aware that a reboot may be necessary.

2.2.2 Installing the EVE Client Components

Once the Server setup is complete, you are ready to install the Client. If you intend to install it on the same PC as the Server, you can click the **Install EVE Client** button now and follow the on-screen instructions. If you plan to install the Client on computers other than the Server, you have 2 options:

1. Take your CD or downloaded setup program to the first PC and run it. Click on **Install EVE Client** and follow the on-screen instructions. Repeat on each PC.
2. Advanced users: when you installed the EVE Server earlier, it installed the Client Setup program onto the server PC in the following folder:

C:\Program Files (x86)\Integrated Scuba Systems\EVEServer\Client

It also created a Network Share to that folder. On client PCs, you can use that Share to run the client setup program over the network.

When the installation is complete, you will see an EVE icon on your desktop and another one in the ISSYS folder on your Programs menu on the Windows Start button. Or, on Windows 8, you will see an EVE tile on your Start screen.

Note to users of previous versions of EVE: if EVE4 was installed on the computer, the EVE5 setup program will rename your old icons from Eve to EVE4, and the new icons will be called EVE.

2.2.3 Firewalls

This section is only relevant if you are using EVE on a local network. It is not appropriate for new EVE installations where the database is hosted on EVE cloud servers.

Microsoft SQL Server is a powerful database program that has strong security features in place to help protect your data from hackers. If you have a Firewall in operation on the computer where the Server is installed and you are using EVE on a network, you need to take the following steps to inform your system that it is OK for the EVE Clients to access data on the Server:

Note: If you first installed the EVE Server component using EVE version 5.7 or earlier (i.e. you are using Microsoft SQL Server 2005) - follow the instructions in part b) below. If you installed EVE 5.8 or later (i.e. you are using Microsoft SQL Server 2008 R2) - follow the instructions in part a) below

a) Instructions when using Microsoft SQL Server 2008 R2

Click Start | All Programs | Microsoft SQL Server 2008 R2 | Configuration Tools | SQL Server Configuration Manager

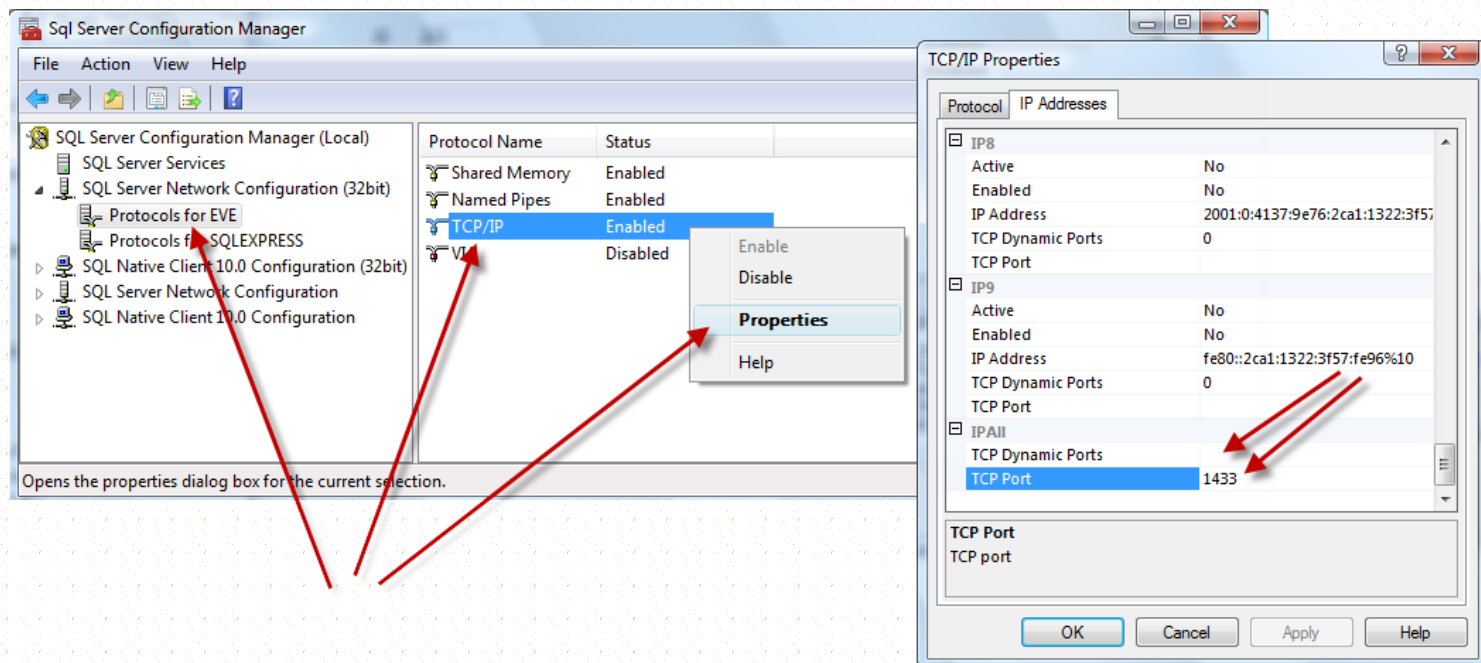
Expand the SQL Server Network Configuration (32bit) section and click on Protocols for EVE

Right click on TCP/IP and click Properties

Click on the IP Addresses tab and scroll down the list to the bottom

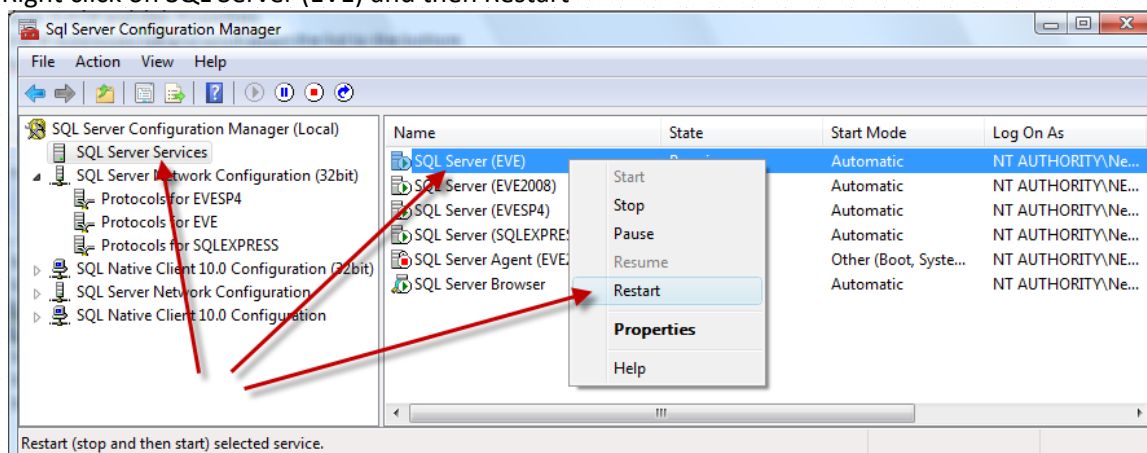
In the IPAll section, remove the value from TCP Dynamic Port and enter 1433 in the TCP Port

Click OK



Click on the SQL Server Services entry in the list on the left.

Right click on SQL Server (EVE) and then Restart



In Windows Control Panel open Windows Firewall.

Click "Allow a program through Windows Firewall"

Click the Exceptions tab

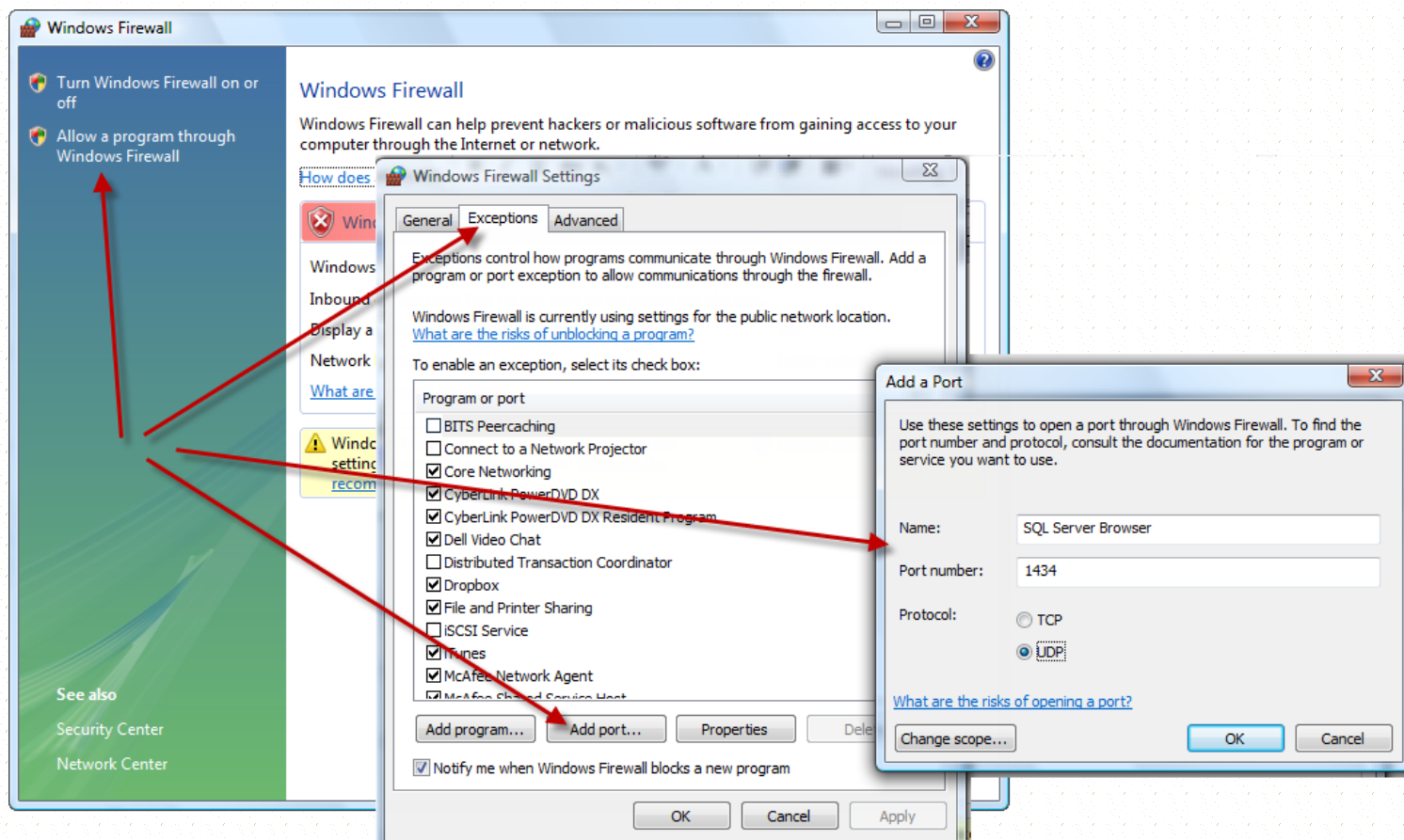
Click Add port

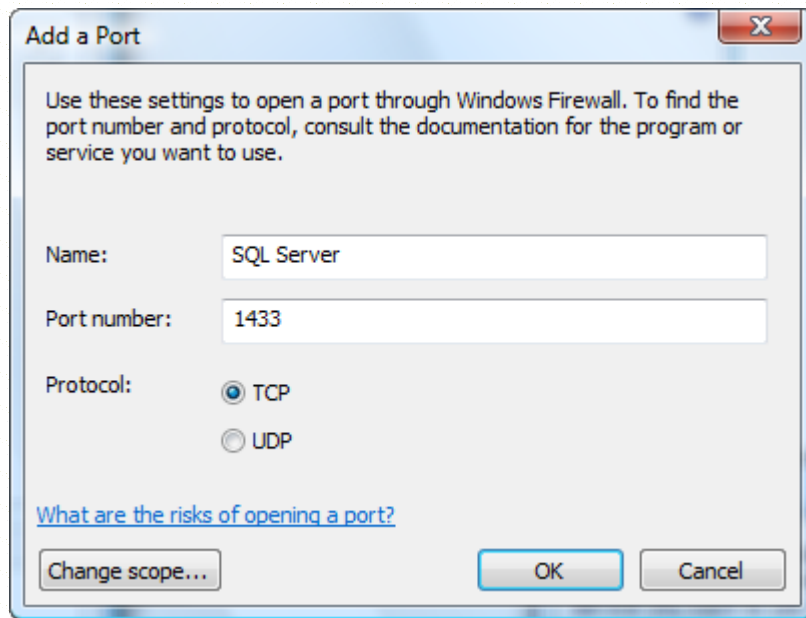
In the Name box enter SQL Server Browser. In the Port number box enter 1434. Choose UDP. Click OK.

Click Add port again

In the Name box enter SQL Server. In the Port number box enter 1433. Choose TCP. Click OK.

Click OK again





If the Add Port option is not present, go into Advanced Settings and create 2 Inbound Rules as above

For more detailed instructions please see: [http://msdn.microsoft.com/en-us/library/cc646023\(v=sql.105\).aspx](http://msdn.microsoft.com/en-us/library/cc646023(v=sql.105).aspx)

b) Instructions when using Microsoft SQL Server 2005

1/ Open your Firewall program. If you use Windows Firewall on XP, you can do this by opening your Windows Control Panel and then double clicking on the Security Center. Click the Windows Firewall link. If you use Norton Firewall, you can open it by clicking Start then All Programs then Norton Personal Firewall then Norton Personal Firewall.

2/ Once your Firewall program is open, you need to inform it that other computers on your network can safely use the following 2 programs:

C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe

In Windows Firewall, do you can do this as follows: Click on the Exceptions tab and then click Add Program. Click Browse and then go and find the first program. Double click on it or select it and click Open. Click Browse again and repeat for the second program. Click OK twice to save changes and quit the Firewall.

In Norton Person Firewall, you can do it as follows: In the Status & Settings section, make sure Person Firewall is selected and click Configure. Click on the Programs tab, click Add and go and find the first program. Double click on it or select it and click Open. Click Add again and repeat for the second program. Click OK to save changes.

2.2.4 EVE in the Cloud

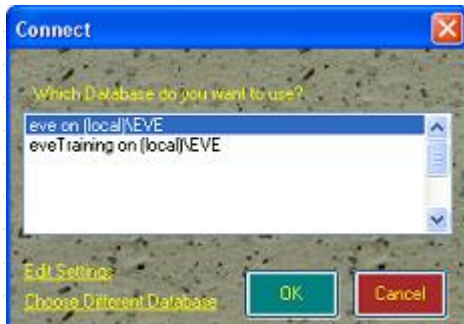
EVE can be installed so that the database is stored in the Cloud so you can use it from multiple locations - e.g. from multiple stores and/or from home or on the road. EVE Diving can host the database for you or you can organize to have it hosted yourself. This is a powerful option and you may want to consider it even if you have only one store. If you want us to host your database for you, we will take daily backups for you and perform other system management tasks. It also has advantages in the area of support since, at your request (and only if you grant us permission by giving us a valid user name and password), we can connect to your database and sort out any issues you may have with your data.

Please contact EVE Diving for more information.

2.3 Starting EVE

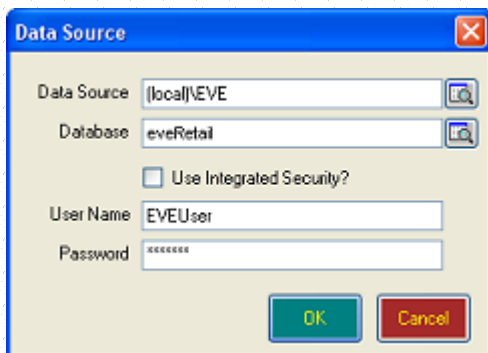
2.3.1 Choosing a Database

Select Database



When you start EVE, the form shown above will be displayed. This lists Databases that you can use. By default, there are 2 databases in the list: eve and eveTraining. eve is initially empty of data except for some pre-defined pick-lists, for example, Course Types, Contact Methods, etc. This is the database you will use to populate with your own data by manually entering information or by importing your data from an external source. eveTraining is pre-populated with example data. You can use this database to get familiar with EVE and when training new employees. You can enter whatever test data you want into this database without affecting your 'live' data.

Select the database you want to use and click OK. Alternatively, if the database you want is not listed, click on the "Choose Different Database" link to load the Data Source form shown below:



Data Source

Select or type the name of the Data Source you wish to use. The Data Source identifies the computer where your database is located. It may be the same PC you are using, or another PC on your network or a remote server on the Internet.

If the database is on the PC you are using, you can specify (local)\EVE as the Data Source or, simply .\EVE

If the database is on the server computer on your network, you can specify ServerName\EVE where you should replace 'ServerName' with the actual name or IP address of your server computer. You can find the name of the server computer by right clicking on My Computer, clicking Properties and then clicking on the Computer Name tab. The name is shown in the 'Full computer name' box and you do **not** need the full stop / period on the end.

If EVE Diving host the database for you, you will use one of our pre-defined names depending on where you are located:

us.evecloudhost.net, uk.evecloudhost.net, au.evecloudhost.net

Database	Select or type the name of the Database you want to use. You will usually use eve or eveTraining
Use Integrated Security	Integrated Security gives you the best security. It means that the security you have set up for users on your PC and/or network (if you have one) will be used to access the database - i.e. a user on a PC that does not have login privileges on your PC and/or network will not be able to gain access to your database.
Username	If you remove the check mark from the <i>Use Integrated Security checkbox</i> , SQL Server security will be used instead. This means that a Username and Password will need to be entered. One database user called EVEUser is defined by default in each database. If you choose to use SQL Server security, you may need to set up a new User first using EVEDBUtils or SQL Server Management Studio. Please contact EVE Diving if you need help with this.
Password	

If you want to change the connection details for an existing database, click on the Edit Settings link. This will open the Data Source form so you can change the details.

If there are database entries in the list that you no longer want, you can right click on them and then click Remove. This simply removes them from the list and does not delete the database files.

2.3.2 Entering Company Details

The first time you start up EVE, you will be asked to enter your company details. Enter details for your dive center or resort. Items marked with an asterisk (*) are required fields. The more information you enter, the more effectively EVE will work.

Introduction

Preferred Language	EVE is currently available in English, Spanish and Italian. Choose which language you prefer by clicking on the button with the magnifying glass. Note:
---------------------------	---

	you can switch between English, Spanish and Italian at any time in EVE using the Options form see section 4.3.1.
PADI Territory	Choose the PADI Territory responsible for your facility. Click on the button with the magnifying glass to see a pop up list of territories to choose from.
PADI Center #	Be careful to type the PADI Center # (i.e. IRRA number) accurately. This is used when interacting with PADI.
Confirm PADI Center #	Confirm your PADI Center # by entering it again.

Company Details

Welcome to EVE

Introduction Company Details Your Details Renewal Code Complete

Company Information

Company Name* Emerald Island Divers

Company # 7465237 Tax Reg. # 9667842

Last Day of This Tax Year* Tuesday , December 31, 2013

Company Address

Country* UNITED STATES

Address Line 1

Address Line 2

City

State

Postcode

Contact Info.

Telephone #1

Telephone #2

Fax

Email

Web

Facebook

<< Previous Next >> Finish Cancel

Company Name	Enter your Company Name. If you run multiple companies, choose the top level or primary organization that represents your dive center. This is the organization under which your EVE licensing agreement should be held. A Cost Center record and a Store record will be created based on the information you just entered.
Company #	Enter your business number as the Company Number. You can leave this blank if it is not relevant to your location.
Tax Reg. #	Enter your Tax Registration Number. Make sure you enter this correctly as by default it will appear on your printed sales receipts. Again, you can leave it blank if you choose.
Last Day of this Tax Year	Enter in the Last Day of this Tax Year. EVE uses this information when downloading data to QuickBooks. The default is December 31 of the current year. You may enter any date you choose.

Country	Enter your company address information.
Address Line 1	
Address Line 2	
City	
Region	
Postcode	
Telephone #1	Enter your company contact details.
Telephone #2	
Fax	
Email	
Web	
Facebook	

Your Details

Welcome to EVE

Introduction

Company Details

Your Details

Renewal Code

Complete

Your Information

First Name*Matt

Middle Initial

Last Name*Western

Username*Matt

Password*****

Confirm Password*****

<< Previous

Next >>

Finish

Cancel

First Name	Enter your full name.
Middle Initial	
Last Name	
Username	Enter your EVE log on name and password. This information will be used to create an EVE user. You can use your full name, your initials or any text you choose as the Username. If you plan to use Employee swipe cards to speed up the login process, you are advised to use initials to reduce the amount of information held on the magnetic stripe.
Password	
Confirm Password	

Renewal Code

The screenshot shows a window titled "Welcome to EVE" with a tabbed interface. The "Renewal Code" tab is selected. The text inside the tab reads: "To unlock EVE, you must enter a Renewal Code below. If you recently purchased EVE but do not yet have a Renewal Code, click on the 'Request Renewal Code' link below to email ISSYS or phone +1 405 285 1912 (US) or +44 20 8688 0084 (UK). If you are testing EVE for a free trial period, check that your computer Date/Time is correct and then click the 'Generate Trial Period Renewal Code' link below." Below the text are two input fields: "Validation #" with the value "4747" and "Renewal Code*" which is empty. Below the input fields are two links: "Request Renewal Code" and "Generate Trial Period Renewal Code". At the bottom of the window are four buttons: "<< Previous", "Next >>", "Finish", and "Cancel".

Welcome to EVE

Introduction Company Details Your Details **Renewal Code** Complete

To unlock EVE, you must enter a Renewal Code below.

If you recently purchased EVE but do not yet have a Renewal Code, click on the 'Request Renewal Code' link below to email ISSYS or phone +1 405 285 1912 (US) or +44 20 8688 0084 (UK).

If you are testing EVE for a free trial period, check that your computer Date/Time is correct and then click the 'Generate Trial Period Renewal Code' link below.

Validation # 4747

Renewal Code*

[Request Renewal Code](#) [Generate Trial Period Renewal Code](#)

<< Previous Next >> Finish Cancel

If you have been given a Renewal Code, enter it in the box. If you are trying EVE for a trial period, click the Generate Trial Period Renewal Code link. This will generate a code that lets you use EVE for 2 months.

Complete

The screenshot shows a window titled "Welcome to EVE" with a tabbed interface. The "Complete" tab is selected. The text inside the tab reads: "That's it! When you click Finish the data will be written to EVE's database and you will be asked to login using the Username and Password you supplied on the previous page. If you have not already done so, please take a moment to register for an Account on our website by clicking on the link below and then clicking the 'Register' button. <http://www.issys.co.uk> Do you have multiple stores and/or would like to work from home? If so, why not let us host your EVE data for you? That way, you can use EVE and have secure access to all of your data over the internet from multiple locations anywhere in the world. We'll take care of backing up your information and can remotely perform other system tasks freeing you to do what you do best. Your data can only be accessed by you and those you approve. Your privacy is respected; we will NOT share your information with anybody. Request more information at: info@issys.co.uk" At the bottom of the window are four buttons: "<< Previous", "Next >>", "Finish", and "Cancel".

Welcome to EVE

Introduction Company Details Your Details Renewal Code **Complete**

That's it!

When you click Finish the data will be written to EVE's database and you will be asked to login using the Username and Password you supplied on the previous page.

If you have not already done so, please take a moment to register for an Account on our website by clicking on the link below and then clicking the 'Register' button.

<http://www.issys.co.uk>

Do you have multiple stores and/or would like to work from home? If so, why not let us host your EVE data for you? That way, you can use EVE and have secure access to all of your data over the internet from multiple locations anywhere in the world. We'll take care of backing up your information and can remotely perform other system tasks freeing you to do what you do best. Your data can only be accessed by you and those you approve. Your privacy is respected; we will NOT share your information with anybody.

Request more information at: info@issys.co.uk

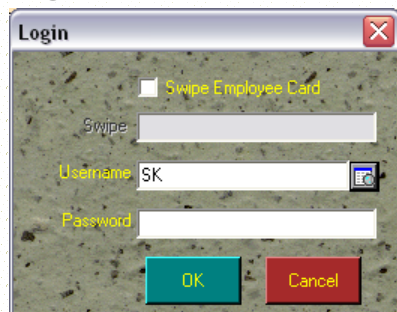
<< Previous Next >> Finish Cancel

Once you are comfortable with your data entry, click the **Finish button** to complete the set up process. If you do not remember your username and password, check this information on the Your Details tab.

2.3.3 Logging On

Users will be asked to log on to EVE each time EVE is started. Only one employee can be logged on to EVE on a single computer at one time. If you have a network with several computers running EVE, a different user can be logged in to EVE on each computer. Different users can log in at any time while EVE is running.

Login



Swipe Employee Card	If your employees are using a swipe card system to log on and off EVE, ensure the <i>Swipe Employee Card</i> checkbox is checked. When employees swipe their card, they will be automatically logged on. Use the Options form (section 4.3.1) to indicate whether you want the Swipe Employee Card box to be checked by default.
Swipe	If an employee swipes on, the Swipe field will display employee specific log on information. Contact EVE Diving if you want us to create employee swipe cards for you. The cards can contain employee information including a magnetic stripe and/or barcode containing the login information.
Username	If you are manually logging on to EVE, enter your Username or select it from the pop up list box.
Password	Enter your Password exactly as it was set up.

Click the **OK button** to log on to EVE. Before you allow employees to begin entering data into EVE, you will want to set up privileges for each user (See Section 21.1.User Privileges). Privileges define what each user is able to do in EVE. Once a user logs on, those privileges come into effect.

You can bring up the Login form from anywhere in EVE by pressing the **F7** key or by selecting the **Switch User** option from the **File menu**.

2.4 General Navigation

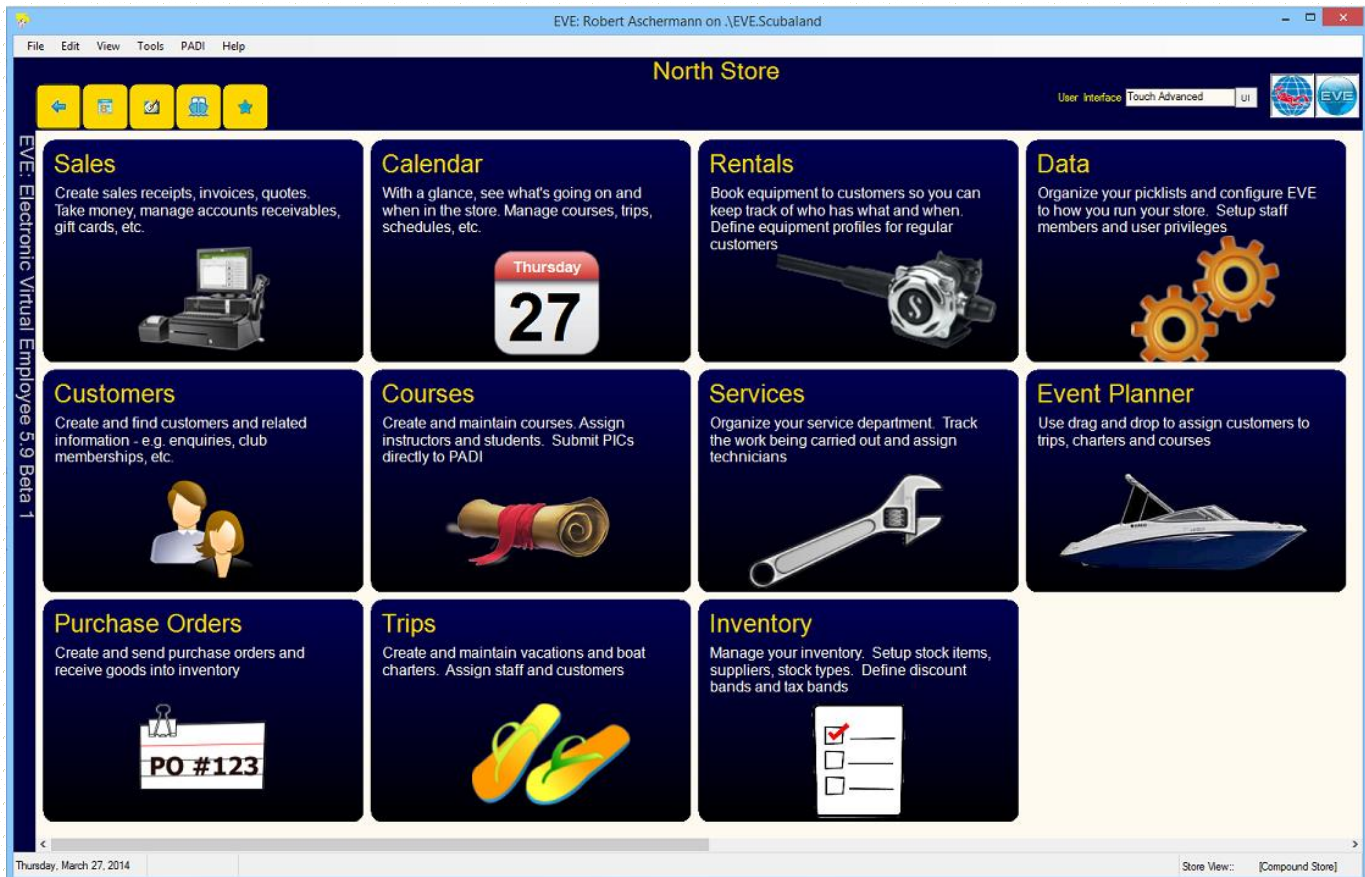
The Main form offers you general access to all modules of EVE. From this form you can start up any of EVE's modules, for example, from the Main form you could create a new Customer or a new Invoice, etc.

One feature of EVE is that you can configure the system to include only the modules that you will be working with. You can change the look and feel of the user interface to suit your business needs. You can choose the User Interface by clicking the UI button at the top right of EVE.

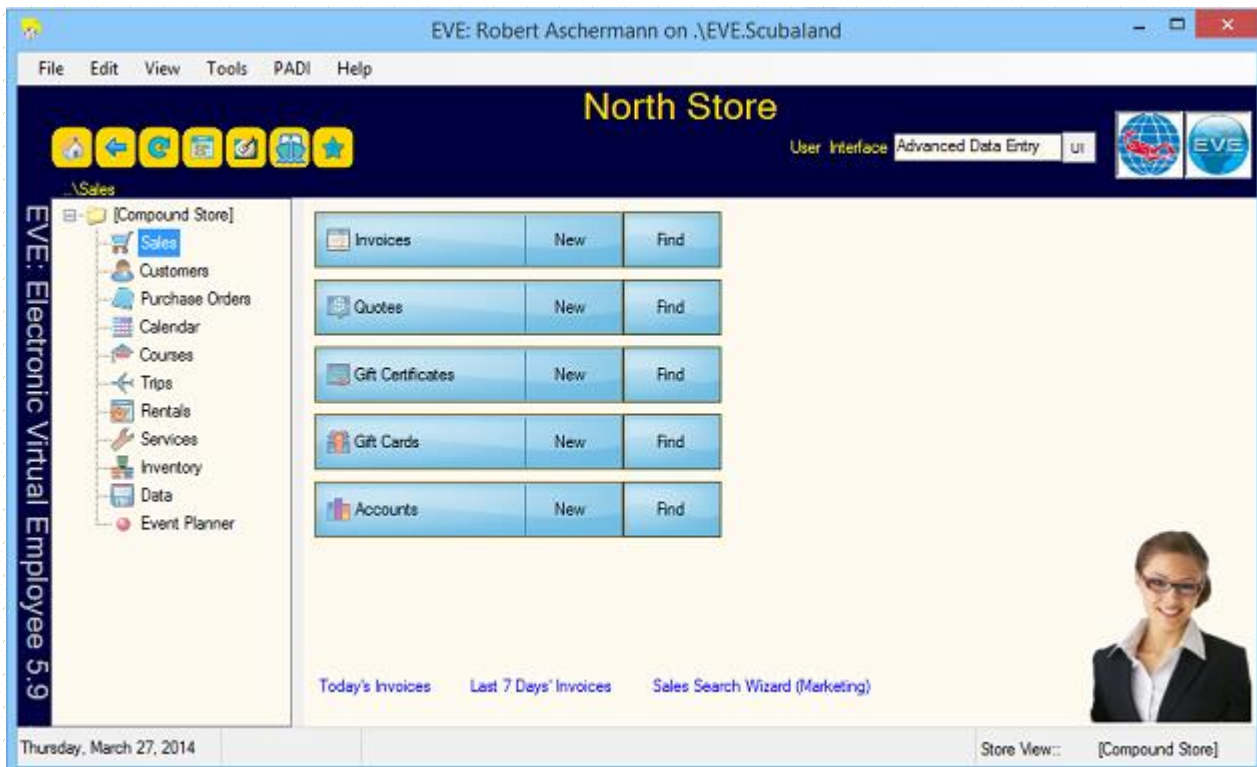
Two of the commonly used interfaces are shown in the graphics below. The first shows the Touch Advanced interface and the second shows the Advanced Data Entry interface. Apart from the different look, the main difference is that, in the Advanced Data Entry interface, the EVE 'modules' are displayed down the left hand side and you can click one to view information relevant to that module on the right - while, in the Touch Advanced interface, the modules appear as big buttons that fill the screen. When you click one, those buttons are replaced by the same information relevant to that module that is shown in the Advanced Data Entry interface.

Throughout this document, we have assumed the Advanced User Interface is selected and will describe how to access processes and features based on that interface.

The screenshot below shows the Touch Advanced Interface.



The screenshot below shows the Advanced Data Entry Interface



Advanced Data Entry User Interface

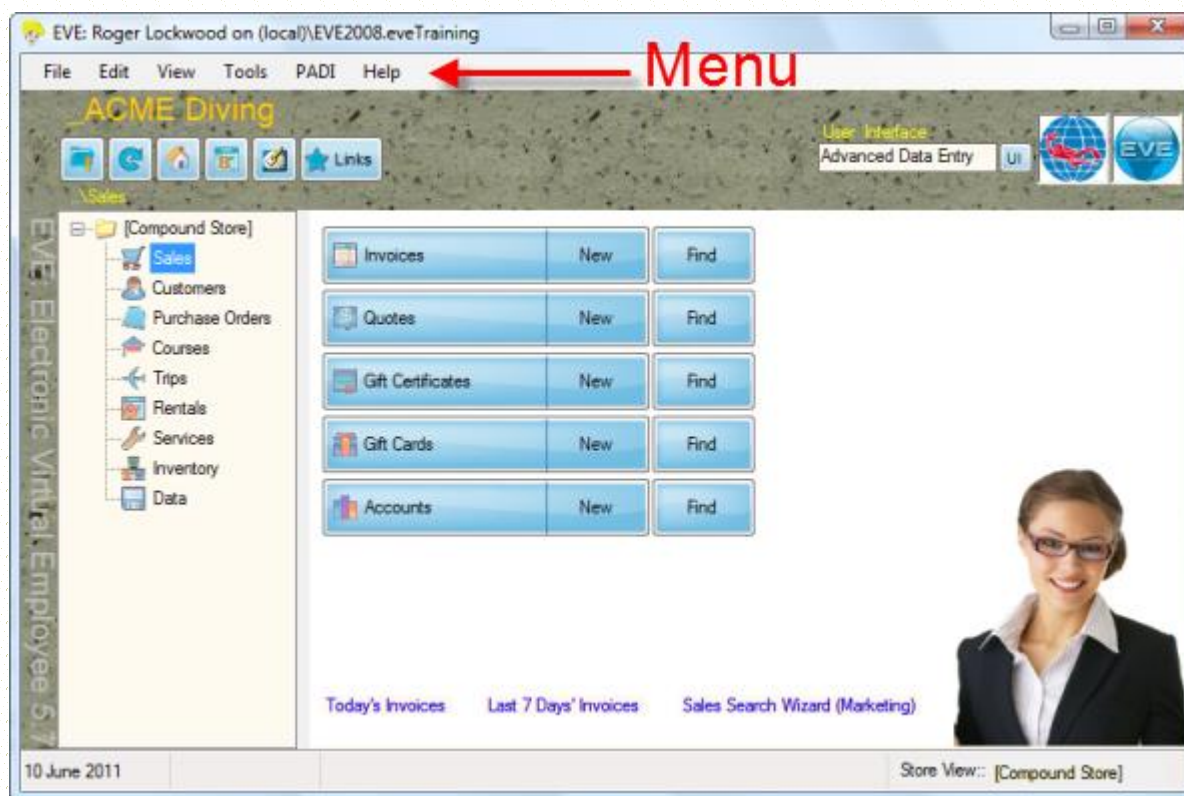
This interface includes the following navigation features: Menu's, Open Forms, EVE Icon, Hierarchy, Button Bar, Status Bar and the Button Array

Not shown on this interface are Module Buttons, Detail Window and the Cool Bar. To access Module Buttons and the Detail Window you will need to switch to the Administrator User Interface by clicking on the UI button at the top of EVE. The Cool Bar is displayed on forms throughout the system (for example, the Invoice and Purchase Order forms, etc.). Alternatively, you can change the displayed navigation features using **Toolbars** on the **View menu**.

You can switch interfaces by clicking the **UI** button at the top right of the main screen. All available interfaces will be displayed.

2.4.1 Menus

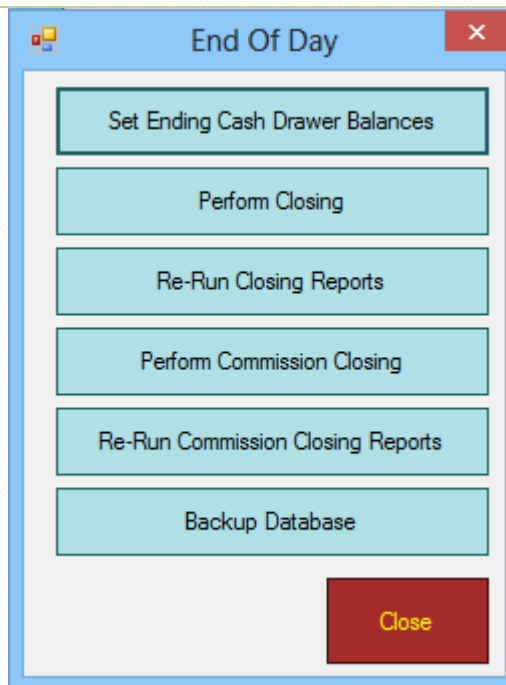
A number of menu items across the top of the form provide you access to some of the most common functions within EVE. These drop down lists can be accessed from anywhere within EVE. Below you will find descriptions of some of the menu items that are specific to EVE.



File Menu

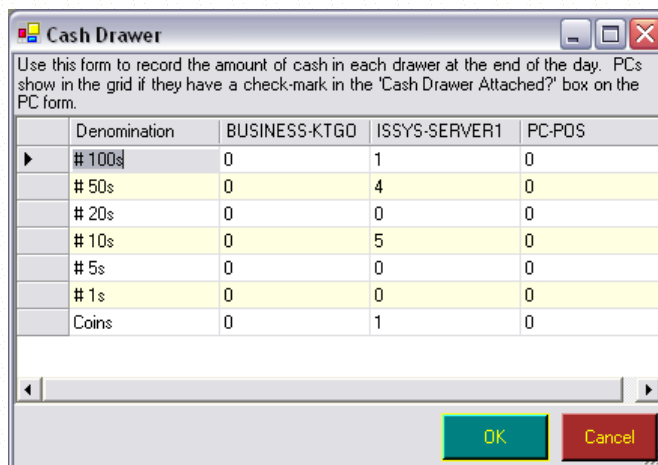
New	New brings up a listing of each of the EVE modules and their corresponding data entry forms. This is a quick way to access a particular data entry form without moving through the modules. Using this option will always bring up a blank data entry form ready for you to enter data.
Open	Open is only available if you have the Detail window turned on (See Section 4.4.34. User Interface Configurations) and you have one or more records selected in the Detail window. Clicking Open at that point will open the Detail window for each record, for example, if 2 customer records are selected, both records will be opened.
Recent Records	Recent Records gives you access to the most recent records you have been working on. Records will be sorted by the EVE module in which they are

	contained. E.g. if you recently worked on 3 invoices, 2 customers and 4 rental bookings, an item will be listed for each and you can click on it to open the data entry form again.																																
Print	Print is only available if you have the Detail windows turned on (See Section 4.4.34. User Interface Configurations) and you have one or more records selected in the Detail window. Clicking Print at that point will cause the Print dialog to be opened so you can choose how the selected records should be printed.																																
Import	Import allows you to import data from EVE4.2 or EVE4.3, Microsoft Excel or PADI. (See Section 3.Importing Data). This option should be used very carefully as importing data may write over existing data in EVE. Access to this option may be limited by setting user privileges (See Section 21.1. User Privileges).																																
Start Of Day Tasks	<p>These are the tasks that you will want your employees to initiate at the beginning of each day. EVE comes pre-configured with one start up task:</p> <div data-bbox="417 701 782 928" data-label="Image"></div> <p>If you want to keep a close watch on the cash in your cash drawer(s) you can inform EVE of the number and denomination of all bills and coins in the drawer(s) at the start of day. The data is written to the Till Reconciliation Report (See Section 18.2. Reports). You can enter cash drawer data for the PCs that have a cash drawer attached. You can indicate which PCs have cash drawers attached using the PC form (See Section 4.4.27. PCs).</p> <p>Set Starting Cash Drawer Balances</p> <div data-bbox="417 1190 1071 1646" data-label="Form"><table><tr><th>Denomination</th><th>BUSINESS-KTGO</th><th>ISSYS-SERVER1</th><th>PC-POS</th></tr><tr><td># 100s</td><td>1</td><td>7</td><td>4</td></tr><tr><td># 50s</td><td>2</td><td>6</td><td>5</td></tr><tr><td># 20s</td><td>3</td><td>5</td><td>5</td></tr><tr><td># 10s</td><td>4</td><td>4</td><td>4</td></tr><tr><td># 5s</td><td>5</td><td>3</td><td>4</td></tr><tr><td># 1s</td><td>6</td><td>2</td><td>5</td></tr><tr><td>Coins</td><td>7</td><td>1</td><td>5</td></tr></table></div> <p>Type in the number of bills of each denomination that are in the draw attached to the PC in question. If you have \$3.50 (or equivalent currency) in coins, type 350 into the coins box.</p>	Denomination	BUSINESS-KTGO	ISSYS-SERVER1	PC-POS	# 100s	1	7	4	# 50s	2	6	5	# 20s	3	5	5	# 10s	4	4	4	# 5s	5	3	4	# 1s	6	2	5	Coins	7	1	5
Denomination	BUSINESS-KTGO	ISSYS-SERVER1	PC-POS																														
# 100s	1	7	4																														
# 50s	2	6	5																														
# 20s	3	5	5																														
# 10s	4	4	4																														
# 5s	5	3	4																														
# 1s	6	2	5																														
Coins	7	1	5																														
End Of Day Tasks	These are the tasks that you will want your employees to complete at the end of each day. EVE comes pre-configured with the closing tasks shown in the screenshot below:																																



The 'End Of Day' dialog box contains a vertical stack of six buttons: 'Set Ending Cash Drawer Balances', 'Perform Closing', 'Re-Run Closing Reports', 'Perform Commission Closing', 'Re-Run Commission Closing Reports', and 'Backup Database'. A red 'Close' button is located at the bottom right of the dialog.

Set Ending Cash Drawer Balances



The 'Cash Drawer' form includes a table for recording cash counts. The table has columns for Denomination, BUSINESS-KTGO, ISSYS-SERVER1, and PC-POS. The rows are for #100s, #50s, #20s, #10s, #5s, #1s, and Coins. Below the table are OK and Cancel buttons.

Denomination	BUSINESS-KTGO	ISSYS-SERVER1	PC-POS
#100s	0	1	0
#50s	0	4	0
#20s	0	0	0
#10s	0	5	0
#5s	0	0	0
#1s	0	0	0
Coins	0	1	0

At the end of the day, you can count the cash drawer(s) and inform EVE of the values. Enter cash drawer data for each PC that has a cash drawer attached.

Perform Closing

At the end of each day, you will want to run the closing reports that are important for your business. You can configure reports to meet your specific needs (See Section 18.2.Reports).

The closing process also includes the Set Ending Cash Drawer process described above. This action does not need to be completed twice.

Re-Run Closing Reports

Use this option if you want to re-print the closing reports from a previous closing. You may want to do this for instance, if a paper jam caused the reports to print incorrectly, or if your accountant wants to view the figures again.

Select the closing you wish to re-print and click the **OK** button.

It is recommended that this be done by an employee that has exclusive access to the database during this time (i.e. no other users are using EVE).


	<p>Perform Commission Closing</p> <p>Use this option to run a closing on commission payments and print the accompanying report(s). See section (See Section 18.2.Reports).</p> <p>Re-run Commission Closing Reports</p> <p>Use this option if you want to re-print the commission closing reports from a previous closing. Select the commission closing you want to re-print and click the OK button.</p> <p>Backup Database</p> <p>A full backup of the database is completed and saved (See Section 21.2.Backups).</p>
Reports	A full list of reports by module can be accessed through Reports (See Section 18.2.Reports).
Report Groups	You can run specific Report Groups to meet your needs (See Section 18.2.Reports). For example, you could set up report groups containing different types of report for the end of the week or end of the month and then print them off at the end of each period.
Wizards	<p>Six Wizards are available to speed data entry and give you quick access to commonly used information.</p> <p>The four search wizards (See Section 18.4.Search Wizards) are available to help you find specific sets of data and help with your marketing campaigns:</p> <ul style="list-style-type: none"> ❖ Customer search wizard ❖ Sales search wizard ❖ Purchases search wizard ❖ Inventory search wizard <p>You could use these, for instance, to find a targeted list of customers and then send them all an email or letter.</p> <p>Two additional wizards are available to help you manage your purchasing tasks (See Section 8.3.Purchasing Wizards):</p> <ul style="list-style-type: none"> ❖ Pricing Wizard ❖ Purchase Order Top Up/Restock Wizard
Open Cash Drawer	This option is only visible if you have indicated on the Options (section 4.3.11) form that a cash drawer is attached. If you have the required privilege, you can open the cash drawer using this option.
Renew	<p>Your licensing agreement with EVE Diving needs to be renewed annually. You will use the Renew process to update your licensing data.</p> <p>Contact EVE Diving support to obtain a renewal code. You will be automatically prompted 30 days prior to your license expiration date to renew EVE.</p>
Switch User	Choose Switch User to display the login form; this is the same box that appears when the application is started. Choose a user name and password. When you click OK , EVE checks that the username/password combination is valid. If so, a list of user privileges is built so that access to certain features of the application can be authorized (See Section 21.1.User Privileges). If you click on the Cancel button you will be returned to the previously loaded module with the previous user privileges.

Lock System	This acts the same as Switch User described above except that, if the Cancel button is clicked, EVE closes. This forces a valid login to be entered before EVE can be used again.
Clock On	This option is used to create a clock-on record for an employee (See Section 14.3.Clock On/Off). This can be used in conjunction with the Attendance Record Report to track hours worked.
Clock Off	At the end of the day, a user can use this option to create a clock-off record (See Section 14.3.Clock On/Off). Note: users are not clocked-off when EVE closes. Users need to manually clock-off.
Switch Database	EVE comes pre-installed with 2 databases (eve and eveTraining). You can switch between databases using this option. When you switch, the previous database is closed and the new one is opened.
Reconnect	If you are using EVE on a network and your network connection is broken (e.g. because a cable was unplugged) you can use this option to reconnect to the database. Alternatively, you can close EVE and re-start it.
Exit	Select this to close EVE.

Edit Menu

Select All	The Select All option is only available if you have the Detail window turned on (See Section 4.4.34.User Interface Configurations). Use it to select all records in the Detail window.
Find	The Find option brings up a listing of each of the EVE modules and their corresponding Search boxes. This is a quick way to access a particular Search box without moving through the modules. Using this option will always bring up a search box for the data element you select.
Copy	These options are only available if you have the Detail window turned on (See Section 4.4.34.User Interface Configurations). Use them to Copy/Paste/Delete selected records.
Paste	
Delete	

View Menu

Tiles	<p>These options are only available if you have the Detail window turned on (See Section 4.4.34.User Interface Configurations). Use them to change the way in which records are displayed in the Detail window.</p> <ul style="list-style-type: none"> ❖ Tiles will show each record with a large icon indicating the type of record. ❖ Icons will show each record with a smaller icon allowing more records to be displayed on screen at one time. ❖ List will show records in a list format. ❖ Details will show each record in a list format with some detail about each record. This is the default.
Icons	
List	
Details	
Calendar	Calendar will quickly bring up the current month's calendar. Look for the Calendar button ,  throughout EVE to bring up the current calendar (See Section 15.Calendar).

Event Planner	The Event Planner allows you to quickly sell places on course and trips by dragging and dropping customers onto them. You can also use it to move customers from trip to trip or course to course. (See Section Error! Reference source not found..Error! Reference source not found.).
Room Availability	Use Room Availability to review resort reservations. Hotels are listed and you can review which rooms are taken on which dates. (See Section 13.Resort Reservations).
Audit Log	An Audit Log is maintained. When records are added, updated or deleted, a log entry is made. Privileged users can view the log which indicates the date/time and the identity of who performed the action (See Section 21.5. Audit Logs).
Reminders	You can set up Task reminders in EVE so a prompt is shown when an employee task is due to start. If you don't want to wait to see what tasks are due, use this option.
Staff Desktop	Each Staff Member registered in EVE has their own 'desktop' - i.e. an area they can use to view their tasks, messages, sales completed, etc. A privileged user can view other employees' desktops. Non privileged users can only view their own desktop.
Tool Bars	You can use tool bars to customize the current view and navigation options in EVE. You can set up standard navigation views in User Interface Configurations (See Section 4.4.34.User Interface Configurations).
User Interface	You can switch between User Interfaces using this option.
Refresh	Refresh is only available if the Detail window is turned on (See Section 4.4.34.User Interface Configurations). If you are using EVE on a network, data may have been updated on a different PC. You can use the Refresh option to tell EVE to reload the data from the database.

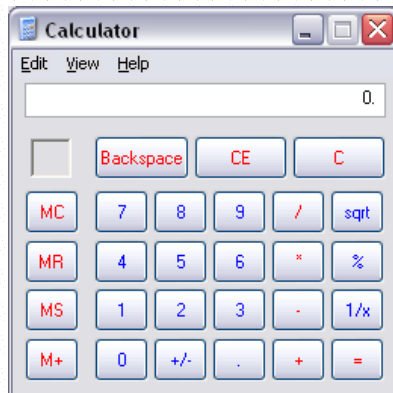
Tools Menu

Labels	You can use Labels to print and view labels containing e.g. stock item details and barcode, as well as to configure your label printers (See Section 0. If you choose Genius, there are additional options.	
	Merchant Name, Merchant Key, Merchant Site ID	All of these will be assigned to you when you sign up for
	Genius Device IP	You can find the IP address of the Genius device as follows: 1/ press the 0 button 3 times on the device. 2/ at the prompt, enter the admin password (supplied to you) The IP Address is shown at the top of the display.
	Display Items on Genius device	Put a tick in the box if you want items added to the shelf to be shown on the Genius device so the customer can see the description.
	Labels Options).	
Print Layouts	Print Layouts are used to customize EVE reports and printed forms throughout EVE (See Section 18.1.Print Layouts). Use this to customize your printed invoices, reports, gift certificates etc. You can change fonts, add logos, etc.	

Word Templates	Word Templates are used to customize EVE word templates used throughout EVE. (See Section 18.3.Word Templates). Use this to customize your word templates. Templates are used to print certain types of documents.
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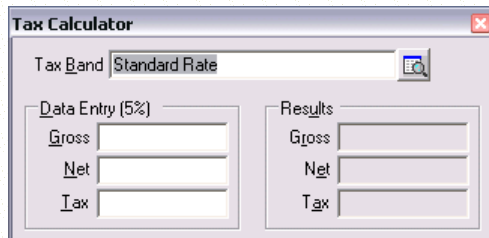
QuickBooks	You can quickly access your QuickBooks wizard and export processes (See Section 19.QuickBooks).
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Calculators	Three calculators come pre-installed with EVE to make it easy for you to calculate figures and convert currencies. Windows Calculator
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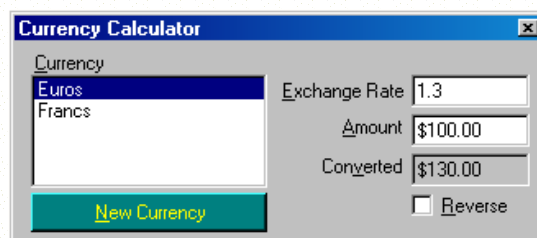
A full description of the Windows Calculator is described in the Windows Calculator Help option.

Tax Calculator



The Tax Calculator allows you to enter the gross, net or tax amount and have the other two figures calculated based on the tax band identified in the pop up list box.


Currency Calculator

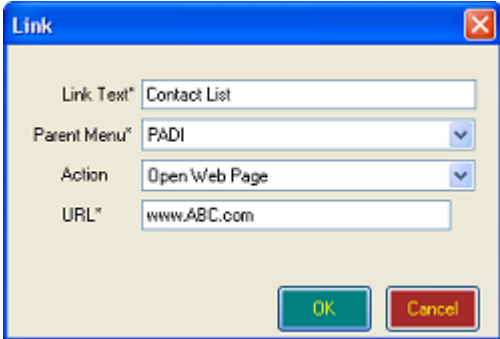


Select the Currency you wish to convert from/to. If the currency you need is not displayed, you can click the **New Currency** button to add a new currency (See Section 4.4.9.Currencies). The last exchange rate is automatically displayed. You can change the rate if you need. Note: this does not permanently change the exchange rate associated with the currency. To do this, go to Currencies (See Section 4.4.9.Currencies). Enter the amount you need to apply it against. EVE will automatically display the converted amount. You can reverse the process by checking the *Reverse* checkbox.

Raw Data	It is strongly recommended that only the most privileged and trained users be granted access to this option. It lets you view and change the raw data in the database. Unless you are very careful updating data here, it is possible to irreparably damage your database.
Refresh Lookups	When EVE is started, it loads various data into memory so pick lists can be shown quickly when required - e.g. the list of employees and stock types, etc. If you are using EVE on a network and pick list data is changed on a different PC, you can use this option to refresh the data in memory on this PC. You will not usually need to use this option as EVE does an auto-refresh periodically.
EVE Agent	<p>The EVE Agent is a powerful tool that lets you automate the sending of emails and text messages and automatically run tasks and commands. The EVE Agent should be left running at all times and it checks every minute to see which tasks you have configured for it to run.</p> <p>E.g. you could configure the Agent to automatically send Happy Birthday emails at 10am every day to everyone whose birthday is today. Or you could configure it to send a text message to everyone whose course is due to start in 2 hours to remind them to show up on time. Another email could go to all people that completed their OW course 6 months ago but have not yet enrolled on an AOW course, etc.</p>
Options	<p>One of the first activities you will undertake is Setting Options (See Section 4.3.Setting Options). These options determine how EVE will react and can help you speed up data entry as well as customize EVE to meet your organizations operational procedures.</p> <p>You can set these options to work on all PCs in your dive center, all PCs on the database (i.e. if you have multiple stores) or just the PC you are working on. This is particularly useful if you have a number of locations that have different operational procedures. Options that access or commit data to the central database are only valid when All PCs is chosen. Other actions, which impact the hardware tied to the specific PC you are working on, are valid only when This PC is chosen.</p> <p>Items that only apply to All PCs are grayed out if you open the form in "This PC" mode. Items that only apply to This PC are grayed out if you open the form in "All PCs" mode.</p>
EVE Folders	EVE uses various files in its operation - for example, grid layout files that determine which columns appear in which grids. EVE needs to know which folders contain these files. Use the EVE folders option to view or change which folders are used. The only time you are likely to need this option is if you are using EVE on a network and you want to share files between different PCs on the network, for example, you may want customer image files to be visible from all PCs. In this case, you will need to change the location of the Images entry on each PC to point at the folder containing the image files on the network (See Section 23.2.EVE Folders).

PADI Menu

On-Line PICs	Use the On-Line PICs feature to process PADI customer certifications (See Section 9.2.4.PIC).
Dive Check	<p>These menu items give you quick access to PADI website features. The  icon on the Main form also gives you access to this menu.</p>
Pro Check	
PADI Travel Network	

DSAT Gas Blender	
PADI.com	
Add Link	<p>You can add your own items to the PADI menu. Click the Add Link menu to show the form below.</p>  <p>Type some text into Link Text to identify the new item. Leave the Parent Menu set to PADI - this indicates the new item will appear on the PADI menu. Select from the pick list what action will be taken when you click the new link. Available options are: Open Web Page, Run Program, Open File. If Open Web Page is chosen, enter the URL (i.e. web page) that will be opened when you click the link. If Run Program is chosen, enter the name of the program that will be run when you click the link. If Open File is chosen, enter the name of the file that will be opened when you click the link.</p>

Help Menu

View Manual (PDF Format)	Loads this document in Adobe Acrobat Reader or Microsoft Word for Windows.
View Manual (Word Format)	
Visit EVE Diving Website	Loads the Integrated Scuba Systems web site in your web browser
About ...	Shows information about the version of EVE you are using.

2.4.2 EVE Icon



The EVE icon, at the top right of the program gives you quick access to EVE Diving options.

Backup Now	A full backup of the database is completed and saved (See Section 21.2.Backups).
Visit EVE Diving Website (www.evediving.com)	This option opens the EVE Diving website giving you up to date access to system information.
Upload File to EVE	Sometimes you may want to upload a file to us from your computer. Use this option if your computer is connected to the Internet to upload a copy of the file onto the EVE Diving web site so we can gain access to it.
Renew License	Your licensing agreement with EVE Diving needs to be renewed annually. See the File menu above for more information.

View Manual (PDF Format)	Loads this document in Adobe Acrobat Reader or Microsoft Word for Windows.
View Manual (Word Format)	
View Log File Folder	The log file is used to trouble shoot system problems within EVE. You can use this option to view the log file (this option is only recommended for IT and technical support personnel).
Email Log File To EVE	Occasionally, EVE Diving may request that you email a copy of your log file to us in order to provide trouble-shooting support for system issues. This option provides an easy way for you to email the file.
Open SQL Server Ports 1433 and 1434	If you plan to use EVE on a network you need to change the Firewall settings on the computer where the database is located to allow other computers to connect to the database. Use this command if you use the Windows Firewall. It will open TCP Port 1433 and UDP Port 1434.

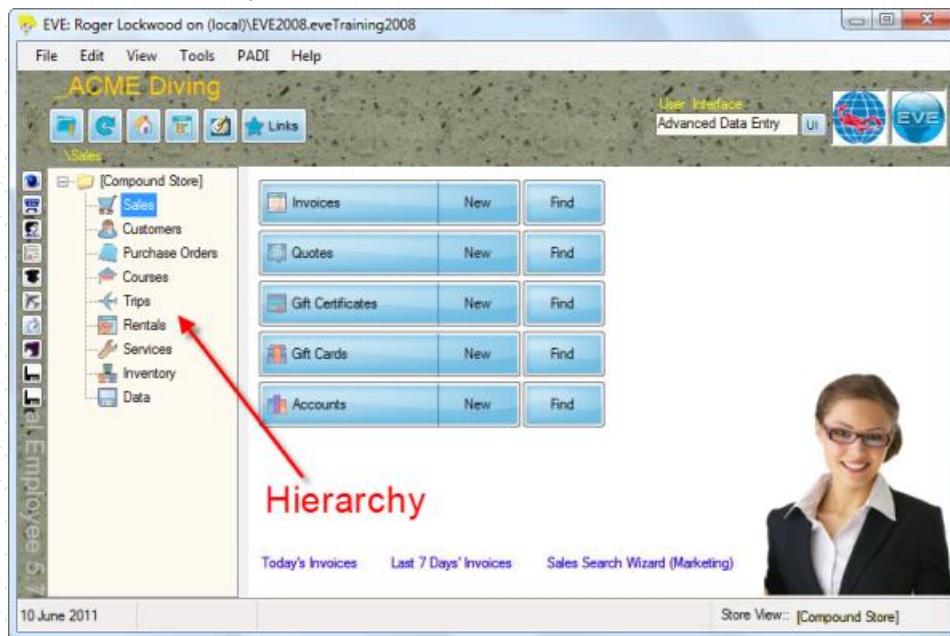
2.4.3 Module Buttons





Module buttons provide a way to move through the modules. By clicking on any of the Module buttons, you move immediately to the module identified.

Module buttons are not displayed in the Advanced Data Entry User Interface. To access Module Buttons, switch to the Administrator User Interface or select **Toolbars** from the **View** menu and choose Module buttons.

2.4.4 Hierarchy

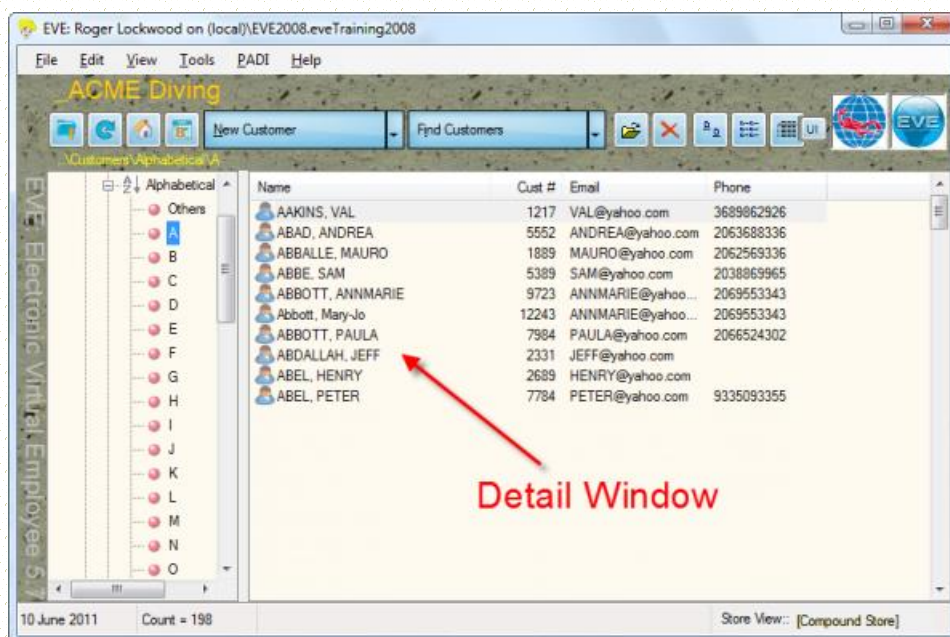


If the Detail Window is not open, the Hierarchy provides a quick way to access the modules of EVE.

If the Detail Window is open, the Hierarchy works much the same as Windows Explorer in terms of moving through modules. Click on the  symbol to expand a selection. Alternatively, you can double-click on the file icons in the Detail Window which will have the same effect. As the selection expands, additional processing or information options will become available. When you have reached the final level, you will be able to open tables or reports in the Detail Window. Click on the  symbol to close a selection.

The Hierarchy is displayed in the Advanced Data Entry User Interface. You can choose whether or not to display the Hierarchy in User Interface Configurations or by deselecting it from the Toolbar option in the **View** menu.

2.4.5 Detail Window

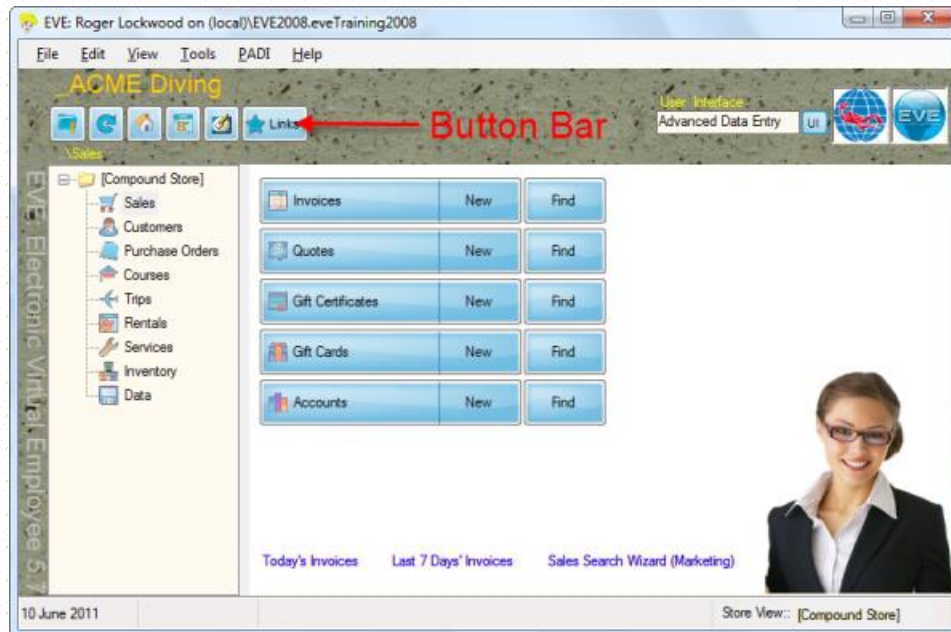


The Detail Window displays the results of your search through EVE's Hierarchy window. You can double-click on the file icons in the Detail Window to move through modules and data elements. As the selection expands,

additional processing or information options will become available. When you have reached the final level, you will be able to open tables or reports in the Detail Window.

The Detail Window is not displayed in the Advanced Data Entry User Interface. To access the Detail Window, switch to the Administrator User Interface or select Toolbars from the **View menu** and choose Detail Window. It is recommended that you display the Button Bar and the Status Bar if you display the Detail Window.

2.4.6 Button Bar



The Button Bar gives you access to some of the commonly used Navigation buttons and tasks in EVE. When the Detail Window is open the Button Bar gives you access to the New and Find functions.

The Button Bar is displayed in the Advanced Data Entry User Interface. You can choose whether or not to display the Button Bar in User Interface Configurations or deselect it using the Toolbar option in the **View menu**. If you select Detail Window, you should also select Button Bar.



Back One Level: this is most useful when you are using the Administrator User Interface and it takes you back a level in the Hierarchy window on the left. I.e. in the image above, clicking the button when Sales is selected would take you to the [Compound Store] level.



Refresh: again, this is most useful when you are using the Administrator User Interface and it refreshes the data that is displayed in the Detail window. You will only usually need to do this if you are using EVE on a network and another user on the network changes the information you are currently viewing.



Home: again, this is most useful when you are using the Administrator User Interface and it takes you to the top level in the Hierarchy



Calendar: this opens the Calendar so you can view all of the activity at the dive center for the month.



Staff Desktop: the opens the Staff Desktop so your staff members can see their activities for the day and see other information relevant to them.



Event Planner: the opens the Event Planner so you can drag and drop customers onto trips and courses.

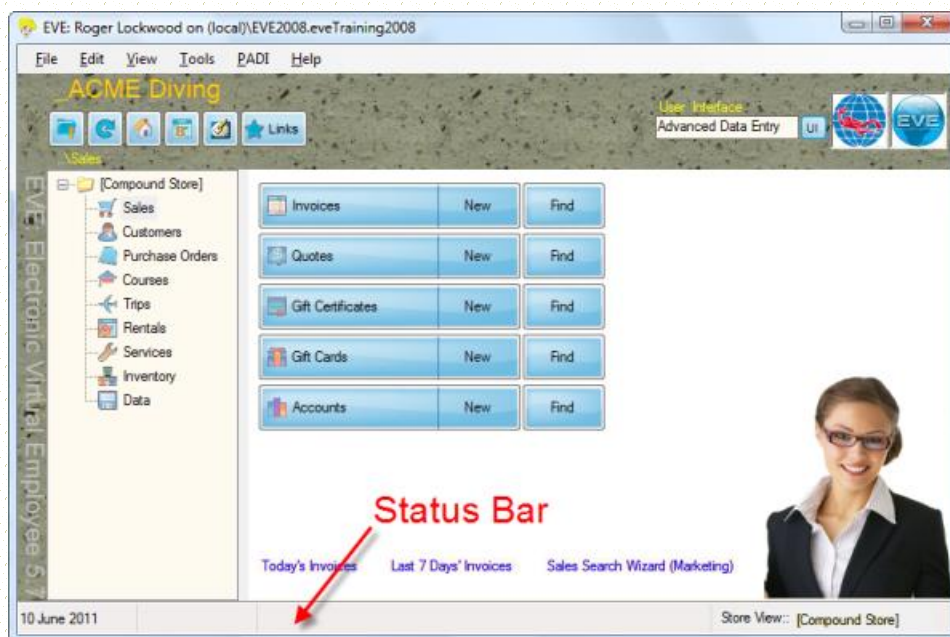


Links: Click this to show the Links menu, which gives you quick access to useful information like frequently used web sites, programs and documents, etc.



Click the 'Add Link' option to add your own websites, programs and documents to the menu.

2.4.7 Status Bar



The Status Bar is most useful when combined with the Detail Window. The Status Bar displays today's date, a count of the number of items displayed in the Detail Window and when you are viewing a cross section of data through the instant click-reports, for example, all discounted items sold yesterday (found by Sales / Invoices / By Date / Yesterdays / Discounted Items in the Hierarchy) the Status Bar will include subtotals and totals relevant to the data selection.

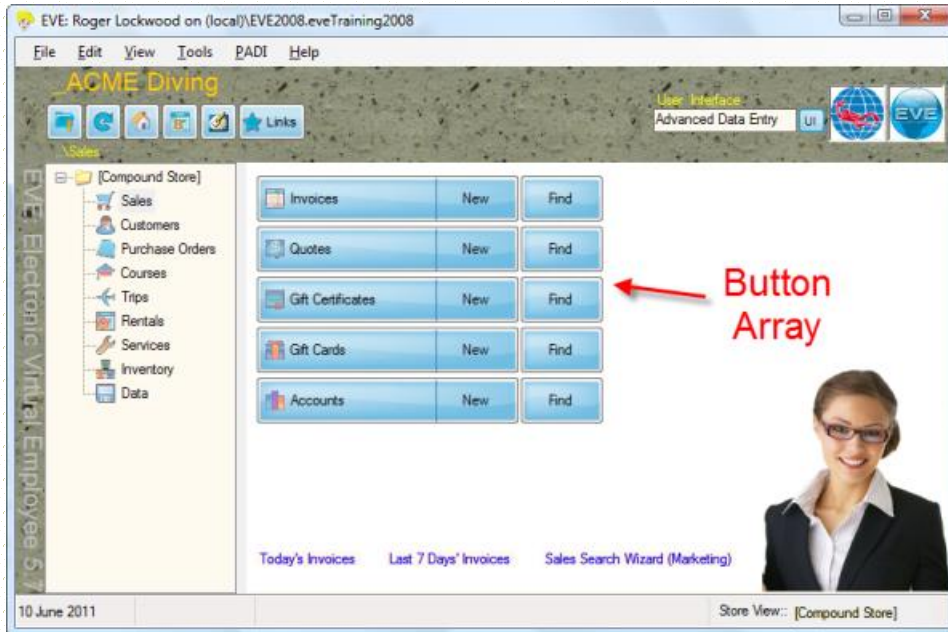
At the bottom right of the Status bar is the Store View link. This is useful if EVE is being used in multi-store mode. Use it to change which data is being viewed as described below:

[Compound Store]: this indicates that all data will be shown when you do a search regardless of which store the data was entered at.

[This Store]: this indicates that only data entered at the active store will be shown when you do a search.

[Default Store]: this option gives you fine-tuning over which data is found when you do a search. For instance, if one store sells diving equipment but not kayaking equipment, whilst a second store sells both, you can record that information in the Stock Types section of EVE and then, in Default Store mode, only information relevant to the active store will be shown. I.e. at store 1, kayaking stock items will not be visible.

2.4.8 Button Array



You may choose to move through modules and tables using the Button Array. This is often used in place of the Detail Window. As you select a module in the Button Array (e.g. Sales in the Hierarchy on the left as shown above), new options to access different data types are shown as buttons on the right (i.e. in the diagram above: Invoices, Quotes, Gift Certificates, Gift Cards and Accounts).

When you have selected Button Array, you will also have access to some of the key instant reports at the bottom of the form (i.e. in the diagram above: Today's Invoices, Last 7 days' Invoices, Sales Search Wizard).

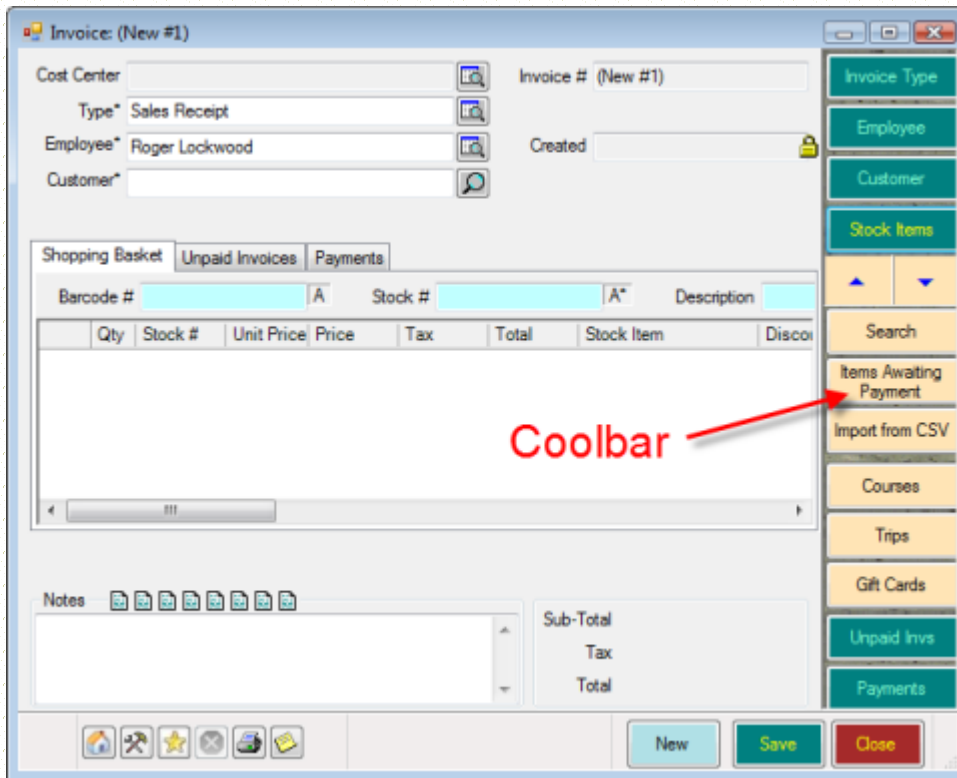
The Button Array is displayed in the Advanced Data Entry User Interface. You can choose whether or not to display the Button Array in User Interface Configurations (See Section 4.4.34. User Interface Configurations) or by deselecting it from the Toolbar option in the **View** menu.

You can also choose which instant reports (links) to display on the form through the User Interface Configuration (See Section 4.4.34. User Interface Configurations)

2.4.9 Open Forms

One of the features in EVE is that you can have multiple windows and forms (Data Entry forms, Search forms, etc.) open from multiple modules. This allows you to complete several related tasks at once, for example, if you have a customer signing up for a course, you can review the course details, complete a rental booking and sell products related to the course all at the same time. If another customer comes into the store while you are completing the first set of tasks, you can open an invoice for the new customer without closing any of the forms for the first customer. The **Open Forms** button allows you to quickly navigate through Open Forms. This option is displayed on top of all EVE windows at all times and allows you to minimize all forms, close all forms or select a specific form for a task you are completing.

2.4.10 Cool Bar



The Cool Bar is most often used on individual Data Entry forms. The Cool Bar is designed to give you quick access to commonly used data. E.g. in the graphic above, when the Stock Items Cool bar section is opened, items that you commonly sell are listed - in this case Courses, Trips and Gift Cards.


You can add buttons to a Cool Bar by right clicking on its background and selecting **Add**. For example, if you sell a lot of Trips at your store you could add the Trips stock type to the Stock Items section of the Invoice Cool Bar. Later, to sell a Trip, click on the item to list all ongoing Trips that are available.

You can further configure the toolbar layout by right clicking on its background and selecting **Configure**. Using this option you can re-order the Cool Bar buttons (for example, so the most commonly used are at the top) and remove unwanted buttons. If you have a touch screen and there are too many buttons to all be shown at once on the Coolbar, you can use your finger to swipe the buttons up and down.


2.4.11 Navigation Assistance Buttons

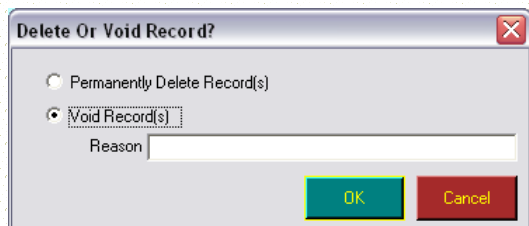
Throughout EVE you will see a number of buttons that can be used for navigation purposes. These buttons are described below:

Open


When a specific record has been chosen, the **Open** button  opens the record for you to view the details. Within the Hierarchy, the **Open** button allows you to drill down through records to reach a specific piece of data (much the same as the open function within Windows Explorer.)

Delete

When a specific record has been chosen, the **Delete** button,  gives you the option to permanently delete or, in some cases, void a record. EVE will issue a warning or error message if you try to delete a record that has links within the relational database. If you void a record, you must enter a reason for doing so.



View Tiles

The **View Tiles button**  is available when the Detail Window has been selected. It allows you to view data in tile format (much the same as the tiles function within Windows Explorer)


View List

The **View List button**  is available when the Detail Window has been selected. It allows you to view data in list format (much the same as the list function within Windows Explorer.)

View Details


The **View Details button**  is available when the Detail Window has been selected. It allows you to view data including related details (much the same as the details function within Windows Explorer.)


PADI Options

These **PADI Options button**  gives you quick access to PADI website features. These are the same features discussed in **PADI** menu.

Options

The **Options button**  is found on most search boxes and forms. The following options are common to all forms.

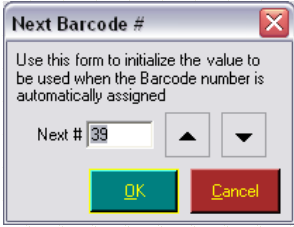
Clone	This option opens a new data item and clones/duplicates the information on the existing data item. For example, if you open an existing Stock Item and then Clone it, the supplier, manufacturer, price, location, etc will be cloned based on the original stock item. This lets you quickly create new items that are similar to the original.
Save Form Position & Size	This option allows you change the default size and position of a form and save that default on the computer you are working on or on all computers.
Action When New Clicked	This option allows you to determine whether or not the save prompt is shown when the New button is clicked if an existing unsaved record is currently being viewed.
Action When Saved Clicked	This option allows you to determine whether or not a new record is opened when the Save button is clicked. For instance, by default when you click Save on the Invoice form, the form is cleared ready for you to enter details of the next Invoice. However, when you click Save on the Customer form, the existing record remains on display so you can modify it again if necessary. You can change these default behaviors using the <i>Action When Save Clicked</i> options.
Action When Delete Clicked	This option allows you to determine whether or not the delete prompt is shown when the Delete button is selected.
Action When Move Clicked	This option allows you to determine whether or not the save prompt is shown when a Move (Next Record or Previous Record) button  is selected.

Printing	Look for the Print button  throughout EVE to print reports and other useful information. You will be able to print information to your printer, screen, email, file or Microsoft Excel.
Audit Log	An audit log is maintained. Each time a record is added, updated or deleted, a log entry is made. Privileged users can view the log which indicates the date/time and the identity of who performed the action (See Section 21.5. Audit Logs).
Linked Files	Sometimes you may want to link documents to a particular record on the database. E.g. you may want to scan a signed waiver form and link it to a customer. Use the Linked Files option to view files that have been linked to the current record and add/remove other files.


In addition to the above options, several special options may be displayed when the **Options** button is selected.

Play Video	This option is available on invoices and quotes. If you have identified a video file with the selected Stock Items on an invoice or a quote, you can play the video with this option. For example, you could link a video of last year's trip to the Cayman Islands to a trip's stock item.
New Special Order	This option is available on invoices. You can create a special order for a customer by using this option.
View Related Invoice(s)	This option is available on invoices. You can use it to view linked invoices if there are any. For instance, you could use it when a Refund is on display to view details of the original invoice that was refunded.
Change Serial Number	This option is available on invoices. If you have assigned a serial number for a stock item, you can use this option to change the serial number if a mistake was made. This is especially useful when you sell an item requiring a serial number that is out of stock. You will create a temporary serial number for the item and then create a special order for it. When the item arrives in the store you can use this option to assign the actual serial number.
View EVE Online Shipping Address	This option is available on invoices. EVE OnLine is an eCommerce program that you can use in conjunction with EVE to sell your products and services on-line. If a customer purchases an item on-line that needs to be shipped, you can open their Invoice in EVE and use this option to see what shipping address they specified.
Show Invoice Profit	This option is available on invoices. Click it to show how much profit you have made on the invoice.
Show Line Item(s) Profit	This option is available on invoices. Click it when one or more line items are selected to see how much profit you have made on those line item(s)
Email	This option is available for customers and on employees. You can use this option to create an email to a specific customer or employee. You can choose to email using Microsoft Outlook, MailChimp or, in some cases, the default email client installed on your computer.
Copy Contact Details From Customer	This option is available when creating a new customer. Click it to show a list of recently added customers. Click one of those to copy their details onto the new Customer record. This is useful if you're adding details for a number of family members. A Search option is also shown so you can search for a customer whose details you want to copy.
Save Image Size	This option is available for customers. You can use it to save the size of the customer image box just on this computer or on all computers.


Image Viewer	This option is available for customers. Use it to show a small image of the customer (if you have associated one with the customer record). The image appears in its own windows so it is visible regardless of which customer information you're looking at.
Reservation Form	<p>This option is available when creating a new customer. You can also access this form using the F9 key.</p> <p>Resort owners will find it useful to define the most important customer fields to capture at the first point of contact and then build these into a checklist for a sales person to use. By clicking on each checklist item, EVE will take you to the correct data entry field.</p>
Configure Image Acquisition	<p>This option is available for customers. You can attach a suitable camera to your computer and then use EVE to capture a picture and link it to the customer record. EVE supports 3 methods of capturing images and you can choose which one to use on the Configure Image Acquisition dialog box:</p> <ol style="list-style-type: none"> 1. Microsoft Expression Encoder. This is the recommended method. Note: the first time you use this option, you will be prompted to install the Expression Encoder files. You will need to do that in order to use this option. When using Expression Encoder, you need to install the appropriate driver that came with your camera (note: if your computer has a built-in web cam that driver is probably already installed) and then choose it on the dialog box. 2. Microsoft WIA Lib (WIA = Windows Image Acquisition). This applies only to Windows XP. 3. Microsoft WIA Aut. This applies to Windows Vista and later
Add to Loyalty Program	This option is available for customers. If you have specified on the Options form that you want to choose which customers are in the Loyalty program (rather than allowing all customers to be members) then you can click this option to add the customer to the program.
Add Auto-email Job	This option is available for customers. The EVE Agent is a tool that lets you automate jobs - e.g. sending Happy birthday emails or text messages. This option lets you schedule an email to go out to the customer at a specified time in the future.
Add to Group	This option is available for customers. Click it to add the customer to a Group. E.g. you could have a group for all members of a family or for a group of friends that often dive together.
B2B	This option is available on Purchase Orders. Once a Purchase Order has been created you can use this option to send the Purchase Order directly to the supplier in a format that is suitable for automatic processing by that supplier. It is only available for select suppliers.
Calculate Employee Module Costs	This option is available when tracking expenses in courses. It can be used to quickly calculate employee costs (the amount you will pay the employee) for a single course module or all course modules.
Add To Invoice	This option is available on rental bookings and service bookings. It will automatically add the rental booking or service booking to an invoice.
Seed Barcode #	<p>This option is available on Stock Items. You will use it to identify the starting number for barcodes to be automatically generated from.</p> <p>Once you have set the initial value, EVE will add one to this each time you ask it to assign a barcode number to a stock item (you will only need to use this form</p>

	<p>once (or not at all)).</p>  <p>The dialog box is titled 'Next Barcode #' and contains the text: 'Use this form to initialize the value to be used when the Barcode number is automatically assigned'. It has a text input field with '39', up and down arrow buttons, and 'OK' and 'Cancel' buttons.</p>
Customize Columns	<p>This option is available when searching for data. If there are additional fields that you can view in the Search results, the Customize Columns option will allow you to add these fields to the results grid. You can click the Select All button or Deselect All button to quickly change options.</p>
Export	<p>You can use the Export option to quickly access the Export function. This lets you export data in the search results grid to Microsoft Word (for mail merge or emailing purposes), Excel or text file (See Section 18.5.Exports).</p> <p>Since Search forms only retrieve a limited number of columns to show in the results grid for speed reasons, when you export, EVE runs a command to fetch additional columns before showing the Export form. If you don't want that to happen - i.e. you only want to export the information that is currently displayed in the search results, hold down the Shift key on your keyboard when you click Export.</p>
Update Multiple Rows	<p>You can use the Update Multiple Rows option to quickly make changes to multiple records of data (See Section 20.1.Update Multiple Rows).</p>


Select All

The **Select All** button  is available on Search forms. Once you have completed a search for data elements you can click this button to quickly select all the records in the results grid.

Deselect All

The **Deselect All** button  is available on Search boxes. Once you have completed a search you can click this button to quickly deselect all the records in the results grid.


Views

The **Views** button  is available on Search boxes. Once you have completed a search for data you can click this button to view the results in tile format, icon format, list format or details format. A fifth format called Thumbnails is available on the Stock Item search form. If you have assigned product images to your stock items, you can use the Thumbnail format to tell EVE to show the image of each item in the search results. You may find this option useful if you use a touch screen.


Print

Look for the **Print** button  throughout EVE to print reports and other useful information. You will be able to print information to your printer, screen, email, file or Microsoft Excel.

Previous Record

The **Previous Record** button  is available on a Data Entry form after you have opened a record from the Search box. Click it to open the record that is before the current one in the Search box's results grid.

Next Record

The **Next Record** button  is available on a Data Entry form after you have opened a record from the Search box. Click it to open the record that is after the current one in the Search box's results grid.


Default Values

The **Defaults** button  provides alternatives to quickly initiate data entry on any form.

Retrieve Defaults	If you have previously defined default values for a data entry form, you can click Retrieve Defaults to retrieve those defaults. For instance, if you are entering new Aqualung wet suit stock items, you could open the Stock Item form, choose Aqualung as the supplier, choose Wet Suits as the Stock Type and click Save Defaults . Then, when you click New each time (or click Retrieve Defaults), the default values are shown so you don't need to pick the supplier and stock type for each new wet suit you create.
Save Defaults	
Save Defaults As	If you want to save multiple default forms (for example, you may have different defaults for Purchase Orders from different suppliers), you can use the Save Defaults As option to uniquely name each default set.


Lock / Unlock

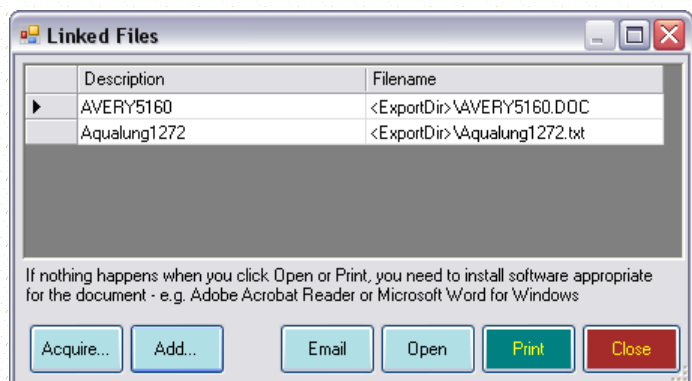
Some records are locked when you open them - i.e. their data cannot be changed until you unlock them. For instance saved invoices work this way so you don't accidentally make changes to them.

The **Lock/Unlock** button  is visible on these types of records. If you have the required privilege (See Section 21.1.User Privileges) you can unlock the record to edit the data.


Linked Documents

Sometimes you might want to link documents or images to a record in EVE. For instance, you might want to link a scanned image of a waiver form that shows the customer's signature to their customer record. Or you might want to save a photograph of a regulator brought in for repair and link it the work order.

Use the **Linked Documents** button  to do this. The form below will be shown. This lists all documents already linked to the record. Click the **Acquire** button if you have a camera, scanner or other device that can be controlled from your computer and that can generate a file. Click the **Add** button if you already have the document saved on your computer and you just want to link it to the record. Select a row in the grid and click **Email**, **Open** or **Print** to perform the appropriate action on it.

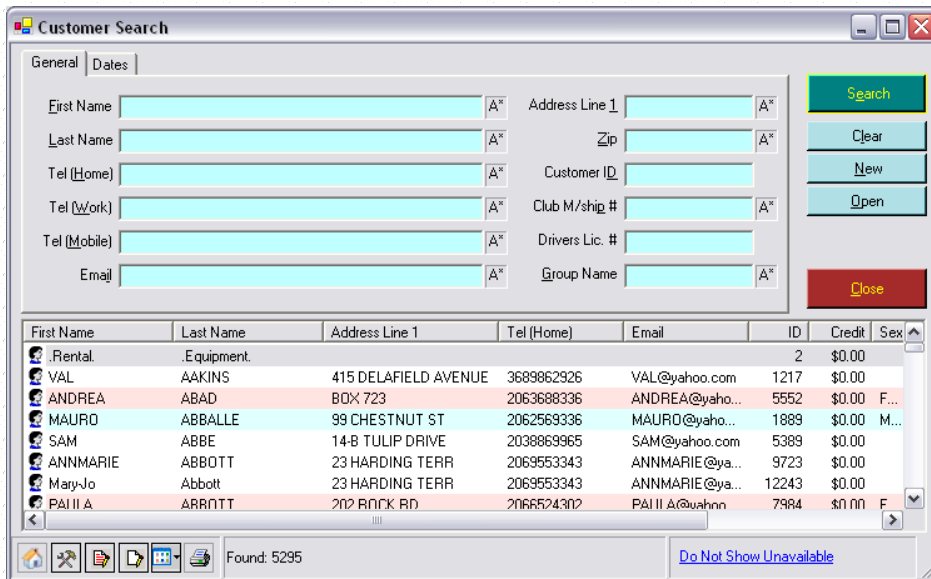


2.5 Entering Required Data

Items marked with an asterisk (*) on data entry forms are required fields. The more information you enter, the more effectively EVE will work. EVE will return an error symbol  and the message *Please Resolve the Following Validation Errors and Try Again* if you attempt to save data without the required information being completed. Sometimes you may want to make other fields mandatory - e.g. you may want to make sure your staff always capture an email address for new customers. To make a field mandatory, right click on its caption and then click the Mandatory option.

2.6 Searching for Data

Searching for data is easy in EVE. Use the Find function anywhere in EVE to search for a specific piece of data within a data type. For example, if you want to find a customer, click the **Find** button within the Customer Module. Looking for a specific Purchase Order, click the **Find** button within the Purchase Order module. Each time you use the find function, a Search box will open.




First Name	Last Name	Address Line 1	Tel (Home)	Email	ID	Credit	Sex
VAL	AAKINS	415 DELAFIELD AVENUE	3689862926	VAL@yahoo.com	1217	\$0.00	
ANDREA	ABAD	BOX 723	2063688336	ANDREA@yahoo...	5552	\$0.00	F...
MAURO	ABBALLE	99 CHESTNUT ST	2062569336	MAURO@yahoo...	1889	\$0.00	M...
SAM	ABBE	14-B TULIP DRIVE	2038869965	SAM@yahoo.com	5389	\$0.00	
ANNMARIE	ABBOTT	23 HARDING TERR	2069553343	ANNMARIE@ya...	9723	\$0.00	
Mary-Jo	Abbott	23 HARDING TERR	2069553343	ANNMARIE@ya...	12243	\$0.00	
PAUL A	ABBOTT	202 ROCK RD	2069524302	PAUL A@wahnn	7984	\$0.00	F

Key fields related to the data type can be found in the top section of the form. These fields act as filters to limit the data and narrow your search. You can search by typing data into any of the filter fields.

Some fields require an exact match before the data will be found. Other fields will allow you to search on close data matches. These fields have a small box to the right of them called the Match Type box, marked as follows:

- ❖ A* - Match start of field. E.g. if you enter 'sa' into the First Name box when its Match Type is A*, customers called e.g. Sam, Samantha, Sarah, etc will be found.
- ❖ *A - Match end of field. E.g. if you enter 'son' into the Last Name box when its Match Type is *A, customers called e.g. Johnson, Davison, Jamison, etc will be found
- ❖ *A* - Match any part of field. E.g. if you enter 'so' into the Last Name box when its Match Type is *A*, customers called e.g. Soper, Jason, Lasso, etc will be found
- ❖ A - Exact Match. E.g. if you enter 'Smith' into the Last Name box when its Match Type is A, only people with a last name of Smith will be found.

You can click on the Match Type box to change the type of matching that will be performed. Searches in EVE are not case sensitive. So, for example, if you type 'sa' into the First Name box, Sarah, sarah, sArAH, etc will all be found.

Fields that are marked with a magnifying glass , allow you to filter data by using a pop up list box.

As you enter data into the search fields, that data field will turn bright yellow. If you have checked the *Perform Immediate Search when Criteria are Entered on Search Forms* checkbox when setting EVE Options (See Section

4.3.1.EVE Options), the search process is automatic and the data that matches your search criteria will be displayed in the Search results grid at the bottom of the box. Alternatively, you can initiate the search process by clicking the **Search** button.

Note: when you see the magnifying glass icon next to a text box, you can double click on the text box to bring up the associated data entry form. E.g. if you double click on the Customer name box on the Invoice form, the Customer form will open for that customer in question. Alternatively, if you double click on the Stock Type text box when you're viewing a Stock Item, the Stock Type will open.

Some data types in EVE can be marked as Unavailable. This means that they remain on the database but are not for general use. For example, if you used to stock a particular item for sale but no longer do, you could mark it as Unavailable so it can no longer be added to new invoices. However, the record is still on the database so it will appear in your end of year sales figures. Usually you will not want to include Unavailable items in your search results. At the bottom right of some search forms is a link that lets you choose whether to include them or not. By default, the link is set to *Do Not Show Unavailable*. Click on the link if you want to *Only Show Available* or *Show All*.

When there is a large amount of data, the search process may take a few moments. If you have not selected any search criteria, you may see a message that asks you to confirm you want to search the full database without restriction. The message will read "You have not entered any search criteria. Do you want to see all entries on the database?" Click OK if you want to continue or Cancel to enter some search criteria before searching.

In some cases, multiple tabs may be available in the Search box. For example, when searching for an invoice, you can search by general data and/or by payment data. Often you will be able to restrict your search by date categories.

First Name	Last Name	Address Line 1	Tel (Home)	Email	ID	Credit	Sex
.Rental.	.Equipment.					2	\$0.00
VAL	AAKINS	415 DELAFIELD AVENUE	3689862926	VAL@yahoo.com	1217	\$0.00	
ANDREA	ABAD	BOX 723	2063688336	ANDREA@yahoo...	5552	\$0.00	F...
MAURO	ABBALLE	99 CHESTNUT ST	2062569336	MAURO@yahoo...	1889	\$0.00	M...
SAM	ABBE	148 TULIP DRIVE	2038869965	SAM@yahoo.com	5389	\$0.00	
ANNMARIE	ABBOTT	23 HARDING TERR	2069553343	ANNMARIE@ya...	9723	\$0.00	
MaryJo	Abbott	23 HARDING TERR	2069553343	ANNMARIE@ya...	12243	\$0.00	
PAIIA	ARRNTT	202 ROCK RD	2066524302	PAIIA@yahnn	7984	\$0.00	F

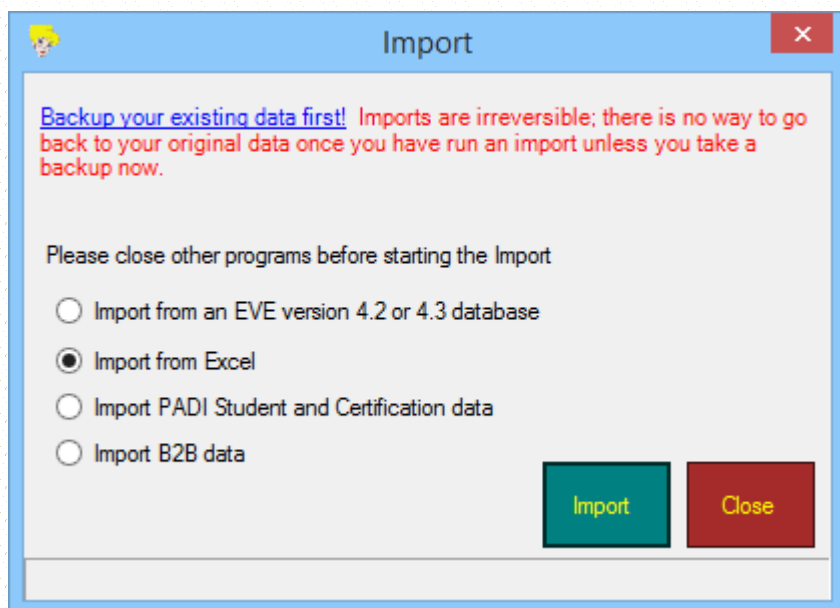
Found: 5295 [Do Not Show Unavailable](#)

You can select data creation dates, update dates or specialized date categories such as last purchase date in case of the Customer Search box.

In all cases, when you use filters and search for data, EVE will remember your data results the next time you open the Search box. If you want to search for new results, click the **Clear** button or enter new search criteria.

3 IMPORTING DATA

If you have the *Can Import Data* privilege set in User Privileges (See Section 21.1. User Privileges), you will be able to import data from a number of sources into EVE. Select **Import** from the **File** menu. The following box will appear:



Once you have imported data, you cannot undo the import. We therefore recommend taking a backup of your database before importing data. Click the blue link at the top of the form to take a backup.

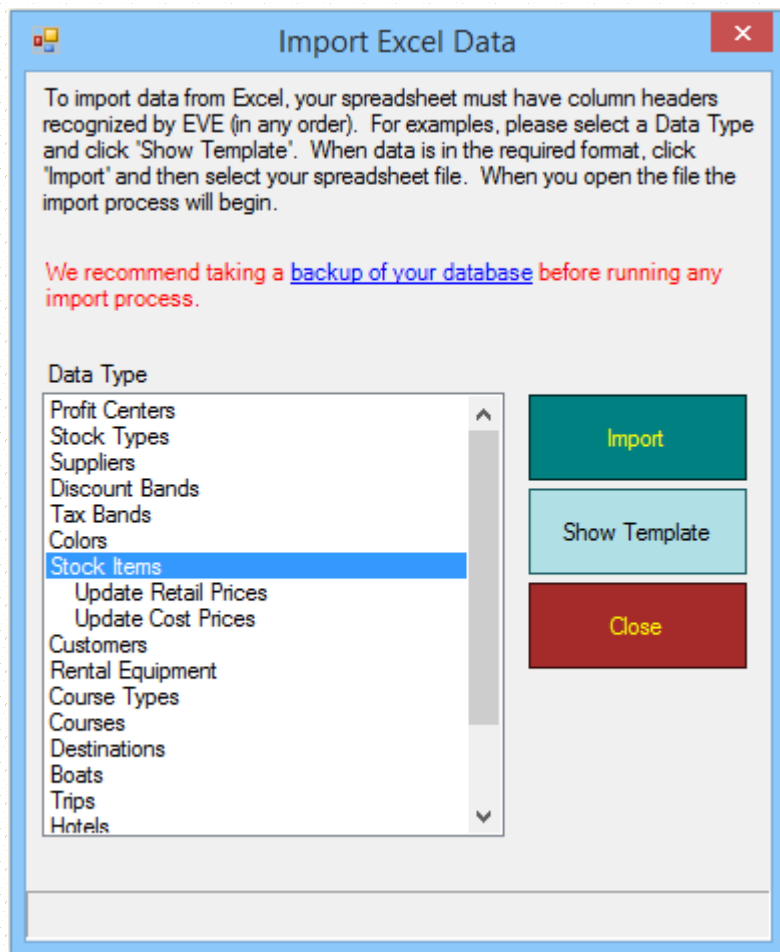
3.1 Importing from a Version 4 (i.e. really old!) database

If you are an existing EVE 4 user, you can import your data into this version of EVE. When you click the Import button, you will be requested to select your existing database. You should choose the EVE4.2 or EVE4.3 Back End database - i.e. the file called EveBE.mdb. By default, this is located in c:\Program Files\ISSYS\User. If you have a version of EVE older than 4.2, please contact EVE Diving and we will import your data into an EVE5 database for you. Once you have selected the database, EVE will show a prompt so you can confirm you want to import the data. Only do this if you are sure you want to continue because the import process **will first delete all existing data in EVE5**. Next, EVE will show a login form that lists all users of EVE4. You need to login using your EVE4 username and password as a user that has Import privileges on EVE4. This is a security measure to ensure untrusted employees cannot import your data into their own EVE5 database. Click OK to initiate the import. This will potentially take several hours to complete depending on the amount of data you entered into EVE4.

3.2 Importing Microsoft Excel Data

You can import data from Microsoft Excel into EVE. The following types of data may be imported:

Profit Centers, Stock Types, Suppliers, Discount Bands, Tax Bands, Colors, Stock Items, Customers, Rental Equipment, Course Types, Courses, Destinations, Boats, Trips, Hotels, Postcode Lookups, Invoices.



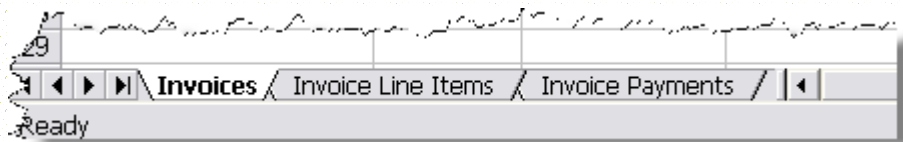
You must ensure that the data in your Microsoft Excel spreadsheet is in the correct format before attempting to import it. A Microsoft Excel template (containing some example data) for each data type is provided in the EVE import folder (c:\program files\Integrated Scuba Systems\Import). You can view the template by clicking the **Show Template** button.

The first row of each template contains column headers. For example, the customer's template contains the following headers: *First Name, Last Name, Middle Initial, Occupation, Date of Birth*, etc. Your file does not need to include all columns listed in the template. However, if your file does include a listed column, the column header in your file must exactly match the column header in the template (for example, if you are importing customer data, your column containing first names must have the text 'First Name' in the first row). Columns in your file do not need to be in the same position as in the template. Before importing, EVE scans your file and locates the positions of each column based on the text in the first row. Some columns are mandatory and these columns are identified with a red header name. For instance, the customer import will fail if you do not provide columns called First Name and Last Name. Any row containing data in the first name and last name columns will be imported into EVE, regardless of whether there is any data in any of the other columns.

Each row (after the header row) in your Microsoft Excel spreadsheet corresponds to one record to be imported (for example, one customer, one stock item, etc.). Each column in your Microsoft Excel spreadsheet corresponds to one attribute of the record (for example, First Name, Last Name, etc.).

Note: once it has successfully imported a row, EVE writes an X to the first column of that row. This is so that if the import process is interrupted, it can be resumed at a later date from where it left off. All rows containing an X in the first column are skipped so the same data is not imported more than once. Be careful to ensure that the first column is blank before you start the process. It does not matter what the column header is.

The Invoice import works slightly differently than the other types, because each invoice contains one record for the invoice itself and then potentially multiple line item records and multiple payment records. For this reason, when importing invoices, your Excel workbook must contain 3 sheets, one for the invoice record, one for the line items and one for payments.



3.2.1 Handling Duplicates

You may encounter duplicates when importing data. Some types of data in EVE require that each record has one or more unique fields. For example, Stock Items must have a unique stock number and a unique barcode number - the stock number of an item must be different than the stock number of all other items, and the barcode number must be different than the barcode number of all other items. If you try to import a record into EVE that would violate the uniqueness requirements, EVE will prompt you how you want to continue.

In the figure below, a stock item record is being imported that has the same stock number as an existing item. You must tell EVE how to continue by choosing an option in the action section and optionally changing the value in one or more of the white fields. You can scroll down to see all fields on the original and import row.

Duplicate Stock Item

Duplicate Found

A Stock Item is being imported that the same name as an existing item. The Stock Item must be unique. Please indicate how you want to proceed.

	Existing Item (1 of 1)	Import Item	
StockID	7295		
Stock#	QX2	QX2	
Barcode#	2	2	✓
InvoiceDescription	12 Ltr Tank	12 Ltr Tank	
StockType	Tanks	Airtanks	
Manufacturer	ScubaPro	Scubapro	
PrimaryColor			✓

Action

☐ Add New item
☒ Overwrite the existing item with data from the Import file. Click for Details ?
☐ Ignore the Import item and continue with the next row of Import data
☐ Abort the Import process

☐ Do the same whenever this happens and don't prompt me again

Apply

Click **Overwrite** if you want to overwrite the existing record with data on the import record. You must decide what you want to happen if there is no data in a particular column on the import row. You can choose to update the corresponding column on the existing record to be blank or you can choose to leave the existing column alone. The decision you make may depend on the circumstances: for instance, if you are importing a supplier stock list to update prices on Stock Items from that supplier, you will probably leave the No In Stock column blank on all rows in the import file. In this case you will not want to update the No In Stock on all existing records as this would wipe out all your stock levels. However, if you are importing a list of suppliers because addresses have changed, you will probably want to update existing data to blank if say the Address2 column is blank on the import record. Not all columns have the option of being handled this way. For instance, columns that are mandatory can never have a blank value on the import record. EVE will put an icon next to column names for which this handling is valid beneath the query symbol. By default, the icon will be implying that the existing value will be left unchanged if the import value is blank. Click on the tick to change it if you want the existing value to be blanked out if the import value is blank.

When doing a stock item import it is possible that the record being imported has the same Stock No as one existing record and the same Barcode No as a different existing record. In this case, EVE will report that duplication errors have occurred on both stock # and barcode # and it will present both existing records to you as well as the import record (there will be two icons next to the existing item text showing a one and a two. Click on each icon to show the corresponding existing record). Be careful when handling this case - you will need to choose carefully whether you want to update the existing record(s) and/or the import record before resolving the duplicates.

Click **Retry** if you want to instruct EVE to try again to import the same record. There is no point in doing this unless you have made a change to the data in one of the white text boxes of the import item. For example, you could change the stock # so that it is no longer the same as any existing stock #s.

Click **New** if you want to instruct EVE to create a new record. Again, there is no point in doing this unless you have made a change to the data in one of the white text boxes of the import item - otherwise you will simply get another duplication error.

Click **Abort** to abandon the import process. All data already imported will remain on the database.

3.3 Importing PADI Data

In the past, if you have notified PADI of customer certifications, you can import details of all those customers and their certifications directly into EVE. This feature is only available once you have purchased EVE. Note: this is a one-time-only download.

You can request your data at www.padi.com by logging in with your Store's PADI Pros details and then by clicking on the Toolbox menu and then the Resort and Retailer link. Then click the EVE data link in the ISSYS/EVE section. Then click the Extract and Email EVE data button. An email will be sent with a Zip file attachment containing your data to the email address that PADI have on file for your store. Save the attachment to your computer and then Unzip it by right clicking on it and then clicking Extract All. You will be asked for a password - this is the same password you used to login at www.padi.com. It works best if you extract the file into EVE's Import folder - i.e. C:\Program Files\Integrated Scuba Systems\EVE\Import or C:\Program Files (x86)\Integrated Scuba Systems\EVE\Import. After extracting the data, you will see one file with a 'PDI' extension.

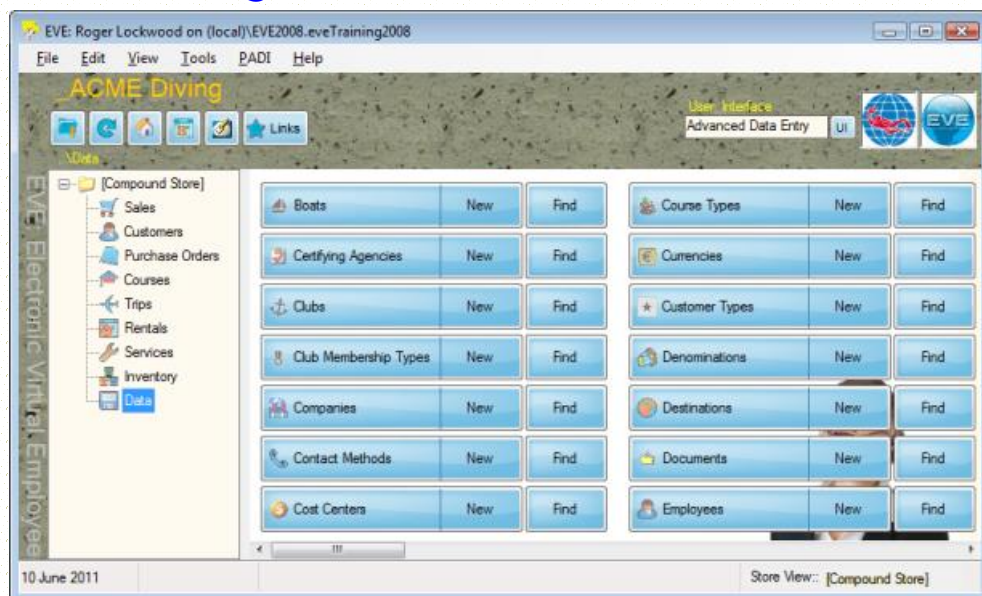
Start EVE. Once you have logged on, the data will automatically be imported. Alternatively, if the files are located elsewhere on your computer disk, you can click the File menu and then Import and then Import PADI Student and Certification data and manually choose the file to import.

PADI holds address data in a different format to EVE. So, after importing your data you may want to tidy-up addresses by moving information between fields (for example, move data from the city field into the postcode/zip field). You can do this by cutting and pasting.

4 SETTING UP A NEW COMPANY

The Data Module is used to define all 'static' data in EVE - i.e. data that you will need to set up once and then only change infrequently thereafter - e.g. the types of courses you teach, the payment methods you accept, etc. Some data has been preloaded into the database. Other data, that is specific to your store, will need to be added.

4.1 Creating New Data



Select the Data Module in the Hierarchy on the Main form. A list of all data types available will be shown in the Button Array. Click **New** from any data type to add a new data element. A form will open allowing you to enter information into the system.

4.2 Modifying Data

If you have converted your data from a previous version of EVE or another system, you may need to modify the data to make use of the full functionality of EVE. In addition, EVE comes pre-loaded with a number of common data elements (for example, PADI Course Types, Enrollment States, Enquiry Sources, etc.) that you may wish to review for applicability to your business.

Choose the Data Module from the Hierarchy on the Main form. Select the specific type of data you would like to modify and click the **Find** button. A Search box will appear allowing you to filter the data elements and narrow your selection.

4.3 Setting Options

One of the first activities you will undertake is setting the options for your operation. Options determine how EVE will react and can help you speed up data entry as well as to customize EVE to meet your organizations operational procedures. To access Options, choose **Options** from the **Tools** menu.

You can set options to work on **All PCs** in your dive center or just **This PC**. A third option is available if you use EVE in a multi-store enterprise that lets you set options for **All PCs at This Store**. This is particularly useful if you have a number of locations, which have different operational procedures. Options that affect all PCs are only valid when **All PCs** is chosen. Other options, e.g. those which impact the hardware tied to the specific PC you are working on, are valid only when **This PC** is chosen. Options are disabled if they are not applicable.

4.3.1 EVE Options

Use the EVE tab to set general behavior and start up options.

Options (All PCs)

Print Layouts Printers Staff Members Start/End of Day Appearance Sound Backups Email Text Messaging
EVE Sales Customers Inventory Courses Trips Rentals Services Data Entry Groups Point Of Sale Labels

When EVE Starts...

☒ Show Database Selector

☐ Synchronize Date and Time with Server
The Server is X hours ahead of this Time Zone

Reminders

Check for Reminders

☐ Send Reminders received on THIS PC as SMS Text Messages to Staff Cell Phones

☐ Only show Reminders for User that is logged on

☒ Perform Immediate Search when Criteria are entered on Search Forms

☐ Show notification when incoming phone call detected (modem required) Prefix to strip

☐ New PCs must be pre-registered before gaining access to EVE

☐ Change UI Language when Employee Logs In

UI Language

OK Cancel

Show Database Selector

Show Database Selector determines whether or not the Database Selector form will display on start-up allowing you to select the database you want to work with. If you are in the training process, you may wish to have access to your live database and the training database. When you are familiar with EVE, you may want to turn off the database selector and always use the live database.

This option is only available if you are setting Options for this PC (as opposed to All PCs).

Synchronize Date and Time with Server

If you want to ensure that EVE's time and date stamps are aligned with your server date and time, ensure this checkbox is checked. You may find this useful so all PCs on the network write the same date and time to new invoice records. If you are running EVE on a single PC, the checkbox has no effect.

The option is only available on Windows XP

The Server is X hours ahead of this Time Zone

If your database is hosted in a different time zone, you may want to specify a time offset for the synchronization. E.g. if your database is hosted on a server on US Eastern time, and you are located in the US Pacific time zone, you could specify the value 3 so your local PCs are synchronized to exactly 3 hours behind the time on the server.

The option is only available on Windows XP

Check For Reminders

You can set up reminders for employees to complete specific tasks. If you want EVE to Check for Reminders and display them, you can set the checking period. This is especially useful if you have remote access to EVE as you can send a reminder to the central database from any location and have each of your

	locations pick up the reminders on a regular basis.
Send Reminders received on this PC as SMS Text Messages	Check this box if you want EVE to send a Text Message to the employee's cell phone when a task reminder is shown.
Only Show Reminders for User that is logged on	When Reminders are shown, you can either choose to have all reminders shown regardless of who is currently logged on to EVE, or you can choose to only show those Reminders for the currently logged on person (and those that are for ALL employees).
Perform Immediate Search When Criteria Are Entered On Search Forms	If you want EVE to begin searching for data as soon as you enter criteria on any search form, check this checkbox. Otherwise, EVE will wait until you have completed your data entry and have clicked the Search button to begin the search.
Show Notification when incoming phone call detected	If you connect a phone line to your computer's modem and then put a check mark in this box, EVE will show a notification message when an incoming phone call occurs. When you click on the notification message EVE will use the Caller ID to perform a lookup of the customer's details - much like what happens when you call your local pizzeria and they know instantly what you ordered last time. This service is applicable in certain regions only.
Prefix to Strip	Enter the prefix to strip from the phone number before performing the search in EVE for the matching customer record. E.g. if you have entered US phone numbers on all of your customer records without the leading '1' then enter 1 into the Prefix to Strip so EVE removes that from the Caller ID number before searching. Otherwise no match will be found.
New PCs must be pre-registered before gaining access to EVE	If this box is not checked, when a PC is used to access EVE that has not been used before, EVE will show a list of Stores on the database so you can indicate which Store the PC is in (if there is only one store on the database the prompt is not shown - EVE just assigns the PC to the Store). However, if the box is checked, EVE will only allow PCs access to the system if the name of the PC is pre-registered on the database. You can do this in the Data section by clicking New PC.
Change UI Language when Employee Logs In	Leave the box unchecked if you want EVE to display text in a particular language regardless of who is logged in. And then choose the language in the pick list. Choose 'Use Regional Settings Language' to use the language that is defined in the Regional settings of your Windows control panel (if available). Put a tick in the box if you want EVE to change language when employees log in. The language will be that defined in the 'First Language' text box on the employee's Customer record (if available). EVE is currently available in English, Spanish and Italian.

4.3.2 Sales Options

Use the Sales tab to define how the Sales Module behaves. There are 3 sub-tabs: General, Accounts Receivables and Print Action.

General

Auto Generate Gift Certificate Numbers	By default, gift certificate numbers are automatically generated by EVE. If you have pre-printed certificates, you may want to change this behavior so you can enter the number manually. When you are Selling Gift Certificates (See Section 6.1.2.Selling Gift Certificates), the certificate number will uniquely identify the certificate.
Auto Generate Loyalty Card Numbers	By default, loyalty card numbers are automatically generated by EVE. If you have pre-printed cards, you may want to change this behavior so you can enter the number manually.
Show 'Source' on Invoice form	Put a tick in this box if you want a picklist to appear on the Invoice form called (Enquiry) "Source" so you can choose the reason that the customer entered your store today - e.g. Passed the Shop, Yellow Pages, etc. The value chosen is saved to the Invoice record. This is not to be confused with the Enquiry Source box on the Customer form which lets you indicate how the customer heard about your store.
Use Sale Prices	<p>This option is no longer available by default and has been replaced by the Store Sale section on this tab (described below). If you prefer the 'Use Sale Prices' method it can be re-instated. Please contact EVE Diving to do that.</p> <p>Periodically you may want to have a sale at your store where you offer discount prices on certain items. In advance you can define the appropriate Discount Band (See Section 4.4.11.Discounts) that will apply to each item during the sale (See Section 5.1.5.Stock Items). Then, on the day of the sale, put a check mark in this box to activate those discounts. Remember to remove the check mark when the sale is finished.</p>
Show Tax Components On Invoice	In some countries it is a requirement to show a breakdown of the different taxes incurred on the printed invoice. If you want to show the breakdown (as opposed to showing a single figure which is the sum of all taxes), check this checkbox.

	When Selling Stock Items (See Section 6.1.1.Selling Stock Items), the total amount of the tax will show on the EVE form but individual taxes will display on the printed invoice.
Show Customer Orders Prompt	Check this checkbox if you want EVE to prompt you about creating a special order for the customer when Selling Stock Items (See Section 6.1.1.Selling Stock Items). If you add an item to the shopping basket that has no items in stock, a prompt will appear to set up a special order. If you leave this box unchecked, you can still create a Special Order using the Options button at the bottom left of the Invoice form.
Can Edit Existing Line Items on Saved Quotes	If this checkbox is checked, you will be able to modify the line items on a Quote even after it has been saved.
Perform Rounding Of Line Items	<p>If the checkbox is checked, EVE will round the tax and total on every individual line item when it is added to the shopping basket. For example, if the net price of an item is \$97.50 and the tax rate is 17.5% then:</p> <ul style="list-style-type: none"> ❖ If the option is checked, \$17.06 will be written to the tax column and \$114.56 will be written to the line item total column. ❖ If the option is not checked, no rounding will take place and \$17.0625 will be written to the tax column and \$114.5625 will be written to the total column. (EVE will round the figures on the form so it will still show \$17.06 and \$114.56 on the form, but on the database it will save the additional decimal places.) Rounding does not occur in this option until everything on the invoice has been totaled. <p>If the checkbox is unchecked, EVE calculates the total invoice tax using unrounded figures. Note: due to rounding, it is possible that the total tax on an invoice may differ from the sum of the line items by a cent or two.</p>
Round Price Before Calculating Tax	This checkbox is only available if you have already checked the Perform Rounding of Line Items box. If checked, the Tax on line items is only calculated after rounding has been performed on the Pre-Tax price. If not checked, Tax is calculated on the pre-rounded price and then Pre-Tax and Tax values are rounded.
Ignore Cost Center Restrictions	By default, EVE keeps transactions relating to different Cost Centers separate. This is because a Cost Center represents a Company, so good book-keeping practices require transactions to be kept separate. However, in some situations you may want to relax these restrictions. If so, put a check in the box.
Gift Certificates/Cards Redeemable At Any Cost Center	If your organization has multiple Cost Centers (See Section 4.4.7.Cost Centers), you will need to decide whether Gift Certificates / Cards Can Be Redeemed At Any Cost Center or only the cost center at which they were purchased.
Include Tax in RP on Stock Item Search	When the results of a stock item search are displayed, this box determines whether the column that shows the Retail Price for each item includes Tax or not.
Append Stock Item Description #2 to Line Item	Each Stock Item can have 2 descriptions. This is primarily for multi-lingual locations that may have e.g. an English and a Spanish description. If you want both descriptions to be appended together when an item is added to an Invoice, put a check in the box.
Check Credit Card Prefixes	Different credit cards have different allowed prefixes. E.g. MasterCard numbers always start with 51,52,53,54 or 55; American Express numbers

	always start with 34 or 37, etc. On the Payment Methods form, you can indicate which prefixes are allowed for each type of card (section 4.4.26). If you want EVE to check prefixes each time a credit card number is entered in the Sales module, put a check in the box.
Each Item appears on its own Row in Shopping Basket	By default, when you double click on an item to add it to the Shopping Basket and then double click on it again, EVE simply increments the Qty value to 2. If you hold down the Shift key when you double click for the second time, EVE will add a second line to the Shopping Basket so both lines have a Qty of 1. You can reverse this behavior by putting a check in the box. Then, by default, each item will appear on its own row, and you can change the behavior back so that the Qty is incremented by holding down the Shift key.
Show Prompt if no match on Barcode Search	If this option is ticked, when you scan a barcode on the Invoice form, a prompt will be shown if there is no matching barcode found on file. If the option is not ticked, no prompt will be shown.
Remember Customer Credit Card Numbers	Check this checkbox if you want EVE to Remember Credit Card Numbers for each customer. When you enter a credit card number into EVE, this data will be stored in the Customers Module. If you choose to remember credit card numbers they are encrypted on the database for security reasons. We do NOT recommend you use this option.
Default Invoice Type	Use the Default Invoice Type to define the default invoice type when Selling Stock Items (See Section 6.1.1.Selling Stock Items). EVE is delivered with Sales Receipt as the default. Some locations - e.g. Resorts - may want to change this to e.g. 'Ongoing Invoice' if customers usually have a tab for the duration of their stay and make one payment at the end to settle the tab.
Refund Invoice Type	By default, when you create a Refund, EVE creates a Sales Receipt with negative quantities. It does this so you can sell other items to the customer on the same invoice. In some locations, it is a requirement that a different Invoice Type is used to differentiate between sales and refunds. In that case, choose a different Invoice Type here for Refunds.
Gift Certificate Duration	Enter a positive number of months to specify the default duration of gift certificates. This will be used to calculate the expiry date when Selling Gift Certificates (See Section 6.1.2.Selling Gift Certificates).
Quote Duration	Enter a positive number of months to specify the default duration of a customer's quote. This will be used to calculate the expiry date when Creating a Quote (See Section 6.4.1.Creating a Quote).
Store Sale	If you plan to have a store sale, you can create a new pricing type/customer type called e.g. Store Sale and assign Store Sale prices in advance for all items that will be in the sale on the Prices tab of the Stock Item form. Then, choose the Store Sale entry on the Options form to tell EVE that those are the prices to use in the sale. And choose the start and end date of the sale.

Accounts Receivables

When Account Balance Reaches Zero	<p>Three alternatives are presented for account management:</p> <ul style="list-style-type: none"> ❖ Automatically Close The Account ❖ Ask Me If The Account Should Be Closed ❖ Do Nothing <p>When a customer makes a payment on account (See Section 6.2.7.Making</p>
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	Payments on Accounts) that brings the customer's account balance to zero, the option you select will determine the action when a customer fully pays off his or her account.
Default Credit Limit	Each account, when created, requires you to set a Credit Limit. EVE will warn you when adding credit to the account if the credit limit is going to be exceeded. You can set the default credit limit here. The default value is 999.

Print Action

Print Action When Item Sold	<p>The dropdown lists in this section indicate what should happen when an invoice is saved that contains one of these items. The options in each dropdown list are the same, i.e. <i>Do Nothing</i>, <i>Print It</i> and <i>Show Print Prompt</i>.</p> <p>E.g. if you want EVE to ask if you want to print a Gift Certificate using EVE's template when the invoice is saved, choose <i>Show Print Prompt</i> in the Gift Certificate list. If you want EVE to print the Gift Certificate immediately without asking, choose <i>Print It</i>. If you have your own pre-printed gift certificates, choose <i>Do Nothing</i>.</p> <p>Note: the print options here do not affect whether the receipt is printed when the invoice is saved. These options only determine whether a print out <i>in addition</i> to the receipt is printed.</p> <ul style="list-style-type: none"> ❖ Gift Certificate ❖ Gift Card ❖ Course ❖ Trip ❖ Resort Reservation ❖ Rental Booking ❖ Service Booking
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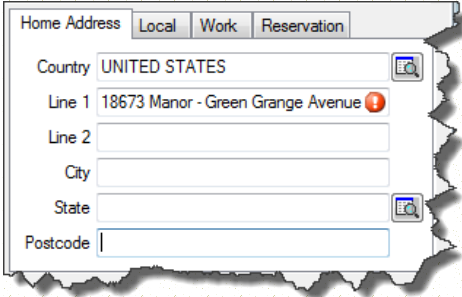
4.3.3 Customers Options

Use the Customers tab to define how the Customer Module behaves. There are 3 sub-tabs: General, Popup Notes and Club and Loyalty Program.

General

General Tab

Search By Typing First Name First	<p>Check this checkbox if you wish to search for customers by first name rather than last name whenever you use the Customer Search box, for example in the Customers Module and when selling stock items.</p> <p>When you start typing into a Customer name field, EVE will show the search form automatically and, if you have put a checkmark in this box, the First Name box will gain focus so the text you enter will go into the First Name search box. Otherwise, the text will go into the Last name box.</p>
Show Skype Options	<p>Skype is an internet phone program that lets you make phone calls free of charge to other Skype users. If you use Skype, put a check mark in this box to turn on Skype features in EVE - e.g. you will see buttons on the Customer form which you can use to automatically call the customer from EVE without having to dial the number.</p>
Auto-Generate EVE OnLine Username and Password	<p>If you use (or plan to use) EVE OnLine (i.e. the e-Commerce companion product to EVE), put a check mark in this box. Each time a new customer record is created, EVE will auto-assign a username and password the customer can use to log in to EVE OnLine. You can use this in conjunction with the 'Auto Email when New Customer is Saved' option, to email the username and password automatically to the new customer.</p>
Show Customer Number Fields	<p>If you have imported customer data from another program, you may want to turn on the Customer Number fields on the Customer and Customer Search forms. Then you can see what Customer number was associated with each customer in your old system. You may find this useful if you have memorized customer numbers for your frequent customers.</p>
Show Reservation Form when Customer form loads	<p>You can use the Reservation form to indicate to EVE which are the most important pieces of information you need to capture when new customers are added. E.g. you may want to capture an email address and cell phone number for everyone. You can have the Reservation form start up every time the</p>

	Customer form opens using this option. Otherwise you can click F9 on the Customer form to open the Reservation form.
Indicate when Max Length exceeded for PIC Online	<p>EVE can upload student and certification information to PADI using EVE's interface to PIC Online. During the upload, PADI impose a restriction on the lengths of some information (e.g. address fields) that can be uploaded. Put a tick in this box if you want EVE to show a red exclamation mark symbol when you have typed more information into a field than can be uploaded to PADI.</p> <p>e.g. in the screen snippet below, the red exclamation mark is shown as PIC Online can only accept 34 characters in the Address Line 1 field and the user has typed more than 34 characters.</p> 
Auto-Email when new customer is saved	<p>If you have the ability to send emails on the PC, you can configure EVE to automatically send an email to a customer when a new customer record is added. To do this, you must create an email as an HTML file and indicate here the path of that file. A demo HTML file called NewCustomer.htm is included with EVE in the following folder: c:\Program Files\Integrated Scuba Systems\EVE\User\Export</p> <p>If you want, the email can contain the new customer's EVE OnLine username and password. To do this, add the following entries to the HTML file:</p> <p>-EOLUserName~</p> <p>-EOLPassword~</p> <p>Note: you may want to use the EVE Agent instead (click Tools then EVE Agent) to perform a similar task. The EVE Agent lets you automate any number of emails - e.g. the sending of Happy Birthday, Congratulations on Course Completion, etc., etc.</p>
Subject Line	Enter the Subject line that will be used for the New customer email.
Default address tab on Customer form	There are 5 tabs in the address section on the Customer form: Home Address, Local, Work, Reservation and Linked Customers. Choose which one of those 5 tabs you want to be active by default when the Customer form opens. The default is Home Address.

Customer Swipe Data	<p>If your customers and/or employees carry cards (e.g. drivers license, employee card, etc.) with a mag stripe or barcode number on it, you may want to turn on the swipe feature. If you put a tick in the 'Show Swipe Information' box, a Swipe text box will appear at the bottom of the Customer and Employee data entry and search forms. You can set focus to that text box and swipe the card. If you have put a tick in the 'Extract info from Swipe data on Customer form' box then, when you swipe a card on the Customer form that EVE 'knows about', information from the mag stripe/barcode will be extracted into the appropriate entries on the Customer form - e.g. some drivers licenses hold customer name, date of birth etc in the mag stripe and that can be extracted into the First Name, Last Name and Date of Birth fields when the card is swiped. For EVE to 'know about' the information contained in the mag stripe on the cards you intend to swipe, EVE needs to be programmed with information about the mag stripe format. EVE Diving will charge to set that up on your database. If you have put a tick in the 'Extract info from Swipe data on Cust Search form' box then, when you swipe the card on the Customer Search form, information from the mag stripe will be extracted into the search criteria fields.</p> <p>Save Customer Swipe Data: There are two ways you can use the swipe data. The first is to extract the information from the mag stripe as described above. The second is to use the mag stripe information itself to search on. I.e. in this case, EVE does not need to extract the information contained in the mag stripe. Instead, you can save the mag stripe information to the customer or employee record and then use the Swipe box on the customer/employee search form to search based on that swipe data later. In the case of employees, the swipe data can also be used to login/logoff and/or clock in/clock off. You can choose whether the full mag stripe information is saved to customer and/or employee records using the 'Employees Only' and 'Customers and Employees' options.</p> <p>NOTE: before turning on Swipe features, make sure it is legal to extract swipe information and/or store swipe information in your location.</p>
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Popup Notes tab

Show Popup Notes when Customer Added to...	<p>Popup notes can be added to customers if you wish. These notes will popup to remind you when you add the customer to an invoice, rental booking, service booking, course or trip. E.g. you could add a note to Peter Smith that he left his wallet last time he was at the store. When Peter Smith is next added to an invoice that note will pop up to remind the employee.</p> <p>You can indicate whether you want this feature to be turned on by putting check marks in the appropriate boxes:</p> <p>Invoice/Quote: notes will appear when customer added to invoice or quote</p> <p>Rental Booking: notes will appear when customer added to rental booking</p> <p>Service Booking: notes will appear when customer added to service booking</p> <p>Course: notes will appear when customer is manually added to a course (i.e. by opening the Course form, clicking on the Customers tab and then clicking the Add button).</p> <p>Trip: notes will appear when customer is manually added to a trip or day/trip (i.e. by opening the Trip form, clicking on the Customers tab and then clicking the Add button).</p>
Show Popup Notes when a Record is Opened	<p>Sometimes you may want those popup notes to also appear when you open an existing Rental or Service Booking. If so, put a tick in the Rental Booking and/or Service Booking box.</p>

Popup Notes to Show	<p>Customer Birthday: if today is the customer's birthday, a pop-up note will be shown to remind you to congratulate them.</p> <p>Customer has no email address on file: if the customer has not told you their email address, EVE will inform you so you can add it to EVE.</p> <p>Customer has an Outstanding A/R balance: if the customer owes you money, you will be notified.</p> <p>Customer is a Credit Risk: if you have marked the customer as a credit risk (on the Details page of the Customer form), you will be notified.</p> <p>Customer is a member of the Loyalty program: if you use the loyalty program feature in EVE, EVE will inform you that the customer is a member.</p> <p>Customer owns multi-sale items: if e.g. the customer has an Air Fill card with fills outstanding, EVE will remind you.</p> <p>Customer is Certified: the customer's certification level will be shown if:</p> <ul style="list-style-type: none"> i) the Completion Status of the certification is either 'Certified' or 'Referred to another store'. ii) the Course Type of the certification has a 'Certification Priority' > 0. This lets you specify that a certification of e.g. Open Water Diver is reported but Drift Diver is not. <p>Customer is NOT Certified: if the customer does not have a Certification on file, EVE will let you know</p> <p>Customer's Club Membership will expire within X days: if the customer is a club member and their membership is due to expire within the number of days you specify, EVE will remind you.</p> <p>Customer's Quote will expire within X days: if the customer has a Quote that is due to expire within the number of days you specify, EVE will remind you.</p> <p>Customer's Invoice is due to be paid within X days: If the customer has an Invoice whose payment is due, EVE will remind you.</p> <p>Customer owns invoices of the following type: indicate which types of invoices you want to be notified about: e.g. Ongoing Invoices and Layaways.</p>
Use Modal Popups	<p>If this box is checked, the sales clerk will need to close the Popup Notes form before they can proceed with other actions in EVE. If not checked, the user can continue with other tasks - the Popup Notes form will remain open at the bottom left of the screen.</p>

Club and Loyalty Program tab

Automatically Set Club Membership Number	<p>If you check the Automatically Set Club Membership Number checkbox, EVE will assign a membership number to each new club member when you are adding customer details (See Section 7.2.2.Adding Club Memberships).</p>
Automatically Set Club Membership Card Dates	<p>Check this option to instruct EVE to automatically assign valid dates for club memberships when adding customer details (See Section 7.2.2.Adding Club Memberships). The dates will be based on the renewal date alternatives you choose in the next field.</p>
Club Membership Renewal Date	<p>Four alternatives are provided for club membership renewal:</p> <ul style="list-style-type: none"> ❖ Renewal Date: A Year From Today

	<ul style="list-style-type: none"> ❖ Renewal Date: A Year From The End Of The Month ❖ Renewal Date: Start Of The Year ❖ Renewal Date: Day XX Of MONTH <p>Choose the option which best reflects your club membership rules and the Club Membership Renewal Date will be automatically set when adding customer details (See Section 7.2.2.Adding Club Memberships). You can manually change the renewal date for an individual if you choose - this option only determines the default date.</p>
Loyalty Program	<p>You can choose to run a loyalty program in EVE if you wish. Under this scheme you can assign credit to members of the program based on their sales activity at your store.</p> <p>The credits are assigned to their loyalty card and that card can be used as a payment method in EVE. See section 7.7 Loyalty Program for more information on setting up and using the loyalty program.</p>
Automatically Assign Loyalty Credit when Invoice Saved	<p>Put a tick in this box if you want loyalty credit to be assigned as soon as each invoice is saved. If you choose this option, you can show how much credit the customer earned on the printed receipt. Leave the box unticked if you want to manually assign credit to loyalty members - e.g. at the end of each day or each week, etc.</p>
Loyalty Program Gift Cards Type	<p>Loyalty cards in EVE are a special type of Gift Card. You can indicate using this option whether you want loyalty cards to be kept separate from other gift cards (i.e. by choosing 'Loyalty Program' as the gift card type) or whether you don't want to distinguish loyalty cards from other gift cards (i.e. by choosing 'Standard' as the gift card type). In the latter case, if a customer owns a standard gift card and then becomes a loyalty member, their loyalty credit will be added to their existing gift card.</p>
Percentage of Net Sales	<p>Enter the percentage value to be used for the loyalty program. E.g. if you want customers to get \$10 loyalty credit for every \$100 spent in the store enter 10. Note: this option is only available if you have not ticked the 'Automatically Assign Loyalty Credit when Invoice Saved' option. If that box is ticked, the amount of credit to assign is calculated using the Loyalty % value on each Stock Item sold - see section 5.1.5</p>
Gift Card Stock Item	<p>If you have not ticked the 'Automatically Assign Loyalty Credit when Invoice Saved' option, when assigning credit to a customer's gift card, EVE creates an invoice in the background as a means of keeping a paper trail for accounting purposes. The invoice has 2 line items on it - the Gift Card Stock Item</p>
Loyalty Account Stock Item	

	<p>represents a stock item that assigns credit to the card. The Loyalty Account Stock Item represents a stock item to keep track of the loss your store is making by giving these bonuses to your customers. I.e. if \$5 of credit is assigned, the invoice will have 2 line items: Gift Card Stock Item \$5 and Loyalty Account Stock Item -\$5. The invoice has a balance of zero as a result. You are advised to use different Profit Centers for both stock items: e.g. the Gift Card Stock Item may have a stock type in the Gift Certificates Profit Center (or you could create a new Profit Center called e.g. Gift Cards) and the Loyalty Account Stock Item may have a stock type in the Loyalty Program Profit Center. When you run your Profit Center report you will then be able to account for the credit being assigned.</p> <p>Use these 2 options to select the stock items you wish to use for the Gift Card Stock Item and Loyalty Account Stock Item.</p> <p>If the 'Automatically Assign Loyalty Credit when Invoice Saved' option is ticked, EVE saves the amount of credit to each line item as its paper trail and therefore does not need to create the Invoice described above.</p>
Loyalty Card Cost Center	Pick the Cost Center that Loyalty Cards will be assigned to.
Loyalty Program Membership	<p>You can choose whether all new and existing customers are part of the loyalty program or whether you want to manually select people to be part of the program. In the latter case you can either use a Group - i.e. all members of the Group are in the loyalty program or you can use a Club - i.e. all members of the Club are in the loyalty program. Choose the appropriate Group/Club in this section.</p>

4.3.4 Inventory Options

Use the Inventory tab to define how Inventory behaves.

Stock Level Change Action	When you change the No. In Stock on the Stock Item form, EVE can prompt you for a reason for the change - e.g. "Items were stolen", etc. Choose the "Ask
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	<p>user for a reason for the change” if you want users to be prompted. Choose “Record who made the change but don’t ask for the reason” otherwise. You can see who made changes by double-clicking on the gray column on the left of the grid on the Stock Levels tab of the Stock Item form. Note: this feature was added in EVE version 5.8, so if you see no information when you double-click that probably means the item was added before version 5.8</p>
Perform Rounding Of Line Items	<p>If the checkbox is checked, EVE will round the tax and total on every individual line item when it is added to a Purchase Order. For example, if the net price of an item is \$97.50 and the tax rate is 17.5% then:</p> <ul style="list-style-type: none"> ❖ If the option is checked, \$17.06 will be written to the tax column and \$114.56 will be written to the line item total column. ❖ If the option is not checked, no rounding will take place and \$17.0625 will be written to the tax column and \$114.5625 will be written to the total column. (EVE will round the figures on form so it will still show \$17.06 and \$114.56 on form, but on the database it will save the additional decimal places.) Rounding does not occur in this option until everything on the Purchase Order has been totaled. <p>With the checkbox unchecked, EVE calculates the total Purchase Order tax using un-rounded figures. Note: due to rounding, it is possible that the total tax on a Purchase Order may differ from the sum of the line items by a cent or two.</p>
Synchronize Retail Prices across all Cost Centers	<p>If you have multiple Cost Centers defined, you can have different retail prices for the same item in each Cost Center. Put a tick in this box if you want to override that and keep the prices the same in each Cost Center. i.e. when you update a price in one Cost Center it will be copied to the other Cost Centers for the item.</p>
When cloning stock items, copy Retail Price	<p>If you’re creating a lot of similar stock items, you can create one and then clone it - i.e. create a copy - and then make small changes such as the color and/or size. You can choose whether retail prices are copied to the cloned stock item or not using this checkbox</p>
...and copy all hard-coded customer type prices	<p>You can define multiple prices for each stock item based on the Customer Type. You can either define discounts based on the customer type or you can hard-code prices on individual stock items. i.e. manually type a price into the price grid. When you clone an item, if this checkbox is checked, those manually typed prices will be copied to the cloned item.</p>
When cloning stock items copy Cost Prices	<p>If this box is checked, Cost prices will be copied to the cloned item.</p>
Inventory Tracking Method	<p>Two alternatives are provided for inventory tracking</p> <ul style="list-style-type: none"> ❖ FIFO (First In First Out) ❖ LIFO (Last In First Out) <p>Choose the option that best represents your inventory costing needs.</p> <p>The alternative you choose will determine which specific Stock Items are removed from inventory when sold based on the date the stock items were received. Using FIFO, the stock item with the oldest date will be sold first. Using LIFO, the stock item with the newest date will be sold first.</p>

4.3.5 Courses Options

Use the Courses tab to define how the Courses Module behaves.

Options (All PCs)

Print Layouts | Printers | Staff Members | **Start/End of Day** | Appearance | Sound | Backups | Email | Text Messaging

EVE | Sales | Customers | Inventory | **Courses** | Trips | Rentals | Services | Data Entry | Groups | Point Of Sale | Labels

Course # Format: <Prefix> <StartDate> <StoreID>
 Course # Date Format: short date

☒ When Course rescheduled, update Course #
☐ Add Interest on Course Completion
☒ Enable Swimming Options (Course Location + Term) on Course Search form

During Course Creation

☒ Insist on at least one Module being on the Course Start Date
☐ Insist on at least one Module being on the Course End Date
☐ Only Staff Allowed to Teach the Course Type can be added
☐ Show Booking Wizard when Customers added on Course form
☒ Show Prompt if no Matching Stock Items

When Courses are Pasted on Calendar

☐ Link Stock Items from Course being Copied
☒ Link Stock Items based on Rules
☐ If Original Items don't match Rules, Ask

When selling Courses

☐ Set default amount being paid to the full price of the course
☒ Set default amount being paid to the Deposit amount
☒ Show Course Balance Due in Invoice Line Item Notes

PICs OnLine

PIC Status when Certs are entered Manually
 Do Not Upload
 'Return Card to' Store
 Update Pending Certs...

Newsletter Settings

OK Cancel

Course # Format	<p>Set the Course # Format. The default is the course type prefix and the start date.</p> <p>This format is used when you are Creating a New Course (See Section 9.1.1.Creating a New Course) to automatically set the course number. For example, if you use the default format, and create a new course starting on 1st January 2008, EVE will set the course number to "OW 1/1/08"</p>
Course # Date Format	<p>Choose the Date Format. The default is 'short date'. You could change this to e.g. "long date" or to your own specific format for example, dd/MMM/yy</p> <p>This affects the format that the date is shown in the course number.</p>
When Course Rescheduled, update Course #	<p>Put a check mark in this box if, when the Start Date of a course is changed, the Course number should change to reflect the new date. If not checked, the original course number will be retained.</p>
Add Interest on Course Completion	<p>On the Course Types form (section 4.4.8) you can indicate course types that are pre-requisites of other course types. E.g OW is a pre-requisite of AOW. Put a check in the 'Add Interest on Course Completion' box if you want EVE to automatically add interest in follow-on courses when a customer completes their course - e.g. if an interest in AOW should automatically be added when OW is completed.</p>
Enable Swimming options	<p>If this box is ticked, Course Location and Term pick lists will be shown on the Course search form.</p>
Insist On At Least One Module Being On The Course Start Date	<p>When this checkbox is checked, you will not be able to save a new course (See Section 9.1.1.Creating a New Course), unless this condition is met.</p>
Insist On At Least One Module Being On The Course End Date.	<p>When this checkbox is checked, you will not be able to save a new course (See Section 9.1.1.Creating a New Course), unless this condition is met.</p>

Only Staff Allowed To Teach The Course Type Can Be Added	<p>Use this option to ensure only those employees authorized to teach this specific course in Employees (See Section 4.4.15.Employees) are listed when Creating a New Course (See Section 9.1.1.Creating a New Course). E.g. a particular employee may be allowed to teach OW courses but not DiveMaster courses.</p> <p>If the checkbox is not checked, all employees that are authorized to instruct [i.e. the employee must be marked with a Customer Type (See Section 4.4.10.Customer Types) that has been defined as having a Course Role] will be displayed when Creating a New Course (See Section 9.1.1.Creating a New Course).</p>
Show Booking Wizard when Customers added on Course form	<p>When you add a customer directly to a course (i.e. by not selling them a place on an Invoice), you can choose whether they should just be added with no further processing, or whether the booking wizard should be shown.</p>
Show Prompt if no Matching Stock Items	<p>When a new course is created, EVE looks at the rules defined on the Links tab of stock items to determine if any of those stock items should be linked to the new course - i.e. whether they can be used to sell places on the course. If no matching stock items are found, EVE can show a prompt so you can quickly create a stock item for the course. If you want that prompt to show, put a tick in the "Show Prompt if no Matching Stock Items" box.</p>
When Selling Courses	<p>Two alternatives are provided for handling course deposits when Selling Courses (See Section 6.1.4.Selling Courses):</p> <ul style="list-style-type: none"> ❖ Set default amount being paid to the full price of the course ❖ Set default amount being paid to the deposit amount <p>Choose the alternative that best meets your needs.</p> <p>If you generally charge the client the full amount of the course on enrolment, you will choose the full price default. If you generally charge only a deposit and charge the balance at some later date, you will choose the deposit default. This option will drive the amount being paid when Selling Courses (See Section 6.1.4.Selling Courses).</p> <ul style="list-style-type: none"> ❖ Show course balance due in Invoice Line Item notes <p>Check this box if you want EVE to show on the printed receipt how much is still due to be paid by the customer for their course if they initially made a down payment.</p>
When Courses are Pasted on Calendar	<p>Stock Items that are used to sell Courses can have 'rules' applied to them that allow new courses to be automatically linked to them. E.g. an Open Water stock item could have rules defined so that all new OW courses starting on a weekday are automatically assigned to it. New OW courses starting at the weekend may be linked to a different stock item. If you copy and paste a weekday course to a weekend start date, EVE needs to know whether the stock item(s) linked to the original course should be applied to the new course or whether the weekend stock item should be used instead.</p> <p><i>Link Stock Items from Course Being Created:</i> copy the stock item(s) from the original course to the new one regardless of whether the rules apply.</p> <p><i>Link Stock Items based on Rules:</i> ignore the stock items that are linked to the original course and use stock item Rules to find any stock items that match and link those to the new course.</p> <p><i>If Original Items don't match Rules, Ask:</i> if stock item(s) linked to the original course do not match those that are appropriate to the new course based on stock item rules, ask the user how they want to proceed.</p>

PIC Status when Certs are added Manually	Usually EVE automatically tracks PIC status - i.e. it keeps track of which students on which courses still need to be added to PICs OnLine. However, if you manually enter a Certification record for a student, EVE needs to know what PIC status to assign. In most cases, you will want the default PIC status in this case to be 'Do Not Upload' or possibly 'Notified by Post'. However, if you do not use EVE's Courses module and you just track certifications by adding them directly in EVE, you may want to change the default to 'Pending' - i.e. the certification still needs to be added to the PIC.
'Return Card To' option	Indicate the default destination of the PIC card. New certifications will be marked with this value by default. Note: you can open any individual certification and change the value - e.g. if the default is "return to store", you could change a particular certification to "return to student".
Update Pending Certs	Click this button to update all certification records that have not yet been sent to PADI to have the value defined in the "Return Card To" box.
Show a Prompt when submitting PIC if a Registration Code is required but none is present	On the Pending PIC form, if you try to submit a PIC for which a Registration code is required but none is present (i.e. you have not entered one onto the PIC OnLine tab of the Certification form), and this box is ticked, EVE will show a prompt so you can enter a Registration Code. If the option is not ticked, EVE will not show a prompt and the PIC will be submitted without a Registration Code. In this latter case, you will be charged 1 PIC credit.

4.3.6 Trips Options

Use the Trips tab to define how the Trips Module will behave.

Trip # Format	<p>Set the Trip # Format. The default is the destination prefix (defined in Destinations (See Section 4.4.13.Destinations)) and the start date.</p> <p>This format is used when you are Creating a New Vacation Trip (See Section 10.1.1.Creating a New Vacation Trip) to automatically set the trip number. For example, if you use the default format, and create a new trip to Cozumel starting on 1st January 2008, EVE will set the trip number to "Coz 1/1/08"</p>
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Day Trip # Format	<p>Set the Day Trip # Format. The default is the boat prefix (defined in Boats (See Section 4.4.1.Boats) and the start date.</p> <p>This format is used when you are Creating a New Day Trip / Charter (See Section 10.2.1.Creating a New Day Trip/Charter) to automatically set the trip number. For example, if you use the default format, and create a new charter on the Wave Rider boat starting on 1st January 2008, EVE will set the trip number to “Wave Rider 1/1/08”</p>
Pickup # Format	<p>If you have left the “Use Classic Style Pickups” checkbox un-ticked, then you can create Trip Pickup records that behave much like trips - i.e. you can create a Pickup on a particular date and time and assign a bus/van driver and assign customers that will be picked up. Use this text box to set the Pickup # format. The default is the Van prefix and the start date.</p>
Trip # Date Format	<p>Choose the Date Format. The default is ‘short date’. You could change this to “long date” or to your own specific format for example, dd/MMM/yy</p> <p>This affects the format that the date is shown in the both the Trip # and the Day Trip #.</p>
Trip # Time Format	<p>Choose the Time format. The default is ‘h:mm tt’ e.g. 9:30 AM</p> <p>This affects the format that the date is shown in the both the Trip # and the Day Trip #. Other appropriate values are : t (i.e. short time pattern taken from the computer’s Regional Settings) and T (i.e. long time pattern taken from the computer’s Regional Settings)</p>
When Trip Rescheduled, update Trip #	<p>Put a check mark in this box if, when the Start Date of a trip is changed, the Trip number should change to reflect the new date. If not checked, the original trip number will be retained.</p>
Show Booking Wizard when Customers added on Trip form	<p>When you add a customer directly to a trip (i.e. by not selling them a place on an Invoice), you can choose whether they should just be added with no further processing, or whether the booking wizard should be shown.</p>
Trips: Show Prompt if no Matching Stock Items	<p>Check this checkbox if you want to be prompted to create a stock item when Creating a New Vacation Trip (See Section 10.1.1.Creating a New Vacation Trip). To sell places on the trip, a stock item will need to be created. However, if you run multiple trips to the same destination and the price is always the same, you may choose to create one stock item linked to the Destination rather than to each individual Trip.</p>
Day Trips: Show Prompt if no Matching Stock Items	<p>Check this checkbox if you want to be prompted to create a stock item when Creating a New Day Trip / Charter (See Section 10.2.1.Creating a New Day Trip/Charter). If each day trip/charter has a unique price, you will check this box and create a stock item for each unique day trip/charter. If, however, the price of day trips/charters is the same for each destination and/or boat, you will create a stock item for the Boat (See Section 4.4.1.Boats) or Destination (See Section 4.4.13.Destinations) to which the charter relates rather than for each individual charter.</p>
Use ‘Classic’ Style Pickups - i.e. linked to individual trips	<p>In EVE 5.8 and earlier, Trip pickups were linked to individual Trips. i.e. you could indicate on the trip form which customers want to be picked up from their hotel. In 5.9 and later, you can choose to use pickups that way or to create Pickup records which are not linked to any particular trip. In this new way, you can create a Pickup record, assign a driver, assign a date/time and assign customers. Busy resorts may have multiple Pickups scheduled on the same day that service different hotels. Put a tick in this box if you want to use the</p>

	original way of doing pickups. Leave the box unticked to use the new way.
When Selling Trips	<p>Two alternatives are provided for trip deposits:</p> <ul style="list-style-type: none"> ❖ Set default amount being paid to the full price of the trip ❖ Set default amount being paid to the Deposit amount <p>Choose the alternative that best meets your needs.</p> <p>If you generally charge the client the full amount of the trip when they reserve, you will set the default to the full price of the trip. If you generally charge only a deposit and charge the balance at some later date, you will set the default amount to the deposit. This selection will drive the amount being paid in the trip price when Selling Trips (See Section 6.1.5.Selling Trips).</p> <ul style="list-style-type: none"> ❖ Show Trip balance due in Invoice Line Item notes <p>Check this box if you want EVE to show on the printed receipt how much is still due to be paid by the customer for their trip if they initially made a down payment.</p>
When Trips are Pasted on Calendar	<p>Stock Items that are used to sell Trips can have ‘rules’ applied to them that allow new trips to be automatically linked to them. E.g. a Trip to Cozumel stock item could have rules defined so that all new trips between March and October are automatically assigned to it. New Cozumel trips between November and February may be linked to a different stock item. If you copy and paste a March-October trip to a start date in January, EVE needs to know whether the stock item(s) linked to the original trip should be applied to the new trip or whether the November-February stock item should be used instead.</p> <p><i>Link Stock Items from Trip Being Created:</i> copy the stock item(s) from the original trip to the new one regardless of whether the rules apply.</p> <p><i>Link Stock Items based on Rules:</i> ignore the stock items that are linked to the original trip and use stock item Rules to find any stock items that match and link those to the new trip.</p> <p><i>If Original Items don’t match Rules, Ask:</i> if stock item(s) linked to the original trip do not match those that are appropriate to the new trip based on stock item rules, ask the user how they want to proceed.</p>
Copy Customers?	<p>Put a tick in the “Trips” check box if you want customers to be copied from the original trip to the new trip when a Trip is copied and pasted on the Calendar.</p> <p>Put a tick in the “Day Trips” check box if you want customers to be copied from the original trip to the new trip when a Day Trip is copied and pasted on the Calendar.</p> <p>Put a tick in the “Simple Bookings” check box if you want customers to be copied from the original to the new booking when a Simple Booking is copied and pasted on the Calendar.</p>

4.3.7 Rentals Options

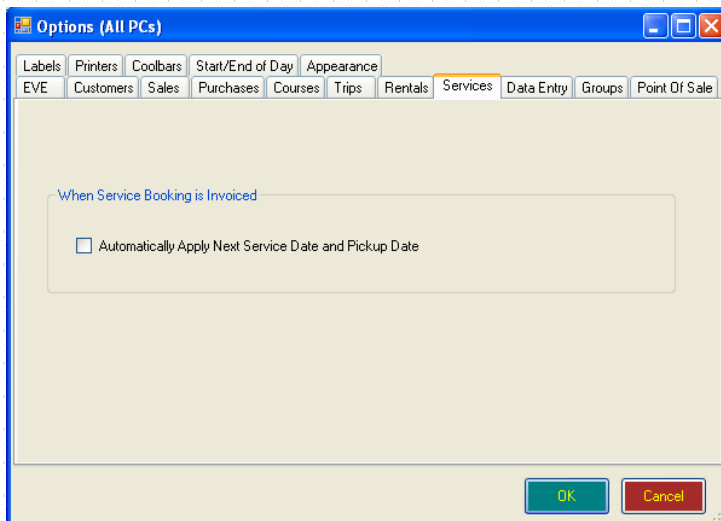
Use the Rentals tab to define how the Rentals Module will behave.

Period Of Grace Before Items Become Overdue	Enter a positive number in the text box. When customers are Returning Rental Equipment (See Section 11.1.4.Returning Rental Equipment) within this amount of time after they were due, the items will not be marked as overdue. i.e. they will not be charged a penalty payment.
Stock Type To Use When Rental Gear Is Converted To Stock Item	EVE offers the option to convert rental equipment to a Stock Item (See Section 5.1.5.Stock Items). When Selling Rental Equipment (See Section 6.1.7.Selling Rental Equipment) you will sell the Stock Item and then adjust your rental gear list. Select the Stock Type to use when converting your rental gear to Stock Items.
ID of Owner of Rental Equipment	This is the ID of the customer that 'owns' all rental equipment. When new items of rental equipment are created, they are automatically assigned to this customer. By default this is set to the value 2 - i.e. the .Rental. .Equipment. customer.
Create a Rental Item when a sale is made to the Rental Equipment Owner	Inventory items and Equipment (Rental) items are 2 different entities. E.g. you may have a single inventory item called 'Mk25' and 10 'Mk25' equipment items numbered Mk25-1, Mk25-2, Mk25-3, etc. To sell an item, you need an inventory item. To rent an item you need a equipment item. If you sell an item to the special EVE customer called 'Equipment Rental', you can instruct EVE to generate an item of equipment for you. To do that put a tick in the 'Create a Rental Item when a sale is made to the Rental Equipment Owner' box.
Only Include Items Available Between The Booking Dates	Check this checkbox if you want only those pieces of equipment that are not already booked out to appear when using the equipment profile (See Section 11.1.1.Adding Gear to the Dive Bag). i.e. when you click on e.g. the Large item on the Rental Profile form when selecting Wet Suits, if this option is checked, only Large Wet Suits that are not already booked out will be listed for you to choose from. If the option is not checked, all Large Wet Suits will be listed regardless of whether they are already booked.

When A Profile Item Is Clicked ...	<p>Three alternatives are provided for using the equipment profile (See Section 11.1.1.Adding Gear to the Dive Bag) to create a rental booking.</p> <ul style="list-style-type: none"> ❖ <i>Show A List Of Matching Items</i> will display all items of the type and size selected so you can choose which one to assign, ❖ <i>Choose a Matching Item for Me</i> will cause EVE to automatically assign an item that matches the selected criteria. ❖ <i>Indicate Any Item of This Type and Size Is Required</i> causes EVE to indicate an item of the type and size is required but not to assign an actual item at that time. This may be useful at establishments with large rental departments where it is necessary to log customers' needs quickly and then to assign the actual items of equipment later at the rental desk.
Show Check-Out Prompt	<p>Check this checkbox if you want EVE to ask you whether rental items should be checked out when a rental booking is added to an invoice (See Section 6.1.6.Selling Rental Bookings). Whether you check the box or not depends on whether you want to check out equipment when the booking is first created or when you charge for the booking.</p>
Booking Will Be Locked When Opened	<p>You can choose if the rental Booking will be Locked when Opened, by placing a check this checkbox.</p> <p>Put a check in the box if you want bookings to be finalized as soon as they are paid for. Remove the check if bookings still need to be changed afterwards.</p> <p>Which option you choose depends on whether you assign actual items of equipment up front, or whether you charge first and then assign the actual items later.</p>

4.3.8 Services Options

Use the Services tab to define how the Services Module will behave.



Automatically Apply Next Service Date And Pickup Date	<p>If you want the next service date to be automatically set based on the service period you set up in Stock Types (See Section 5.1.6.Stock Types), check this box. The checkbox will also automatically set the pick-up date to the invoice date.</p> <p>If the box is not checked, EVE will show a prompt when you save an invoice containing a service booking so you can set the Next Service Date and Pickup Date yourself.</p>
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4.3.9 Data Entry Options

Use the Data Entry tab to define how Data Entry forms behave.

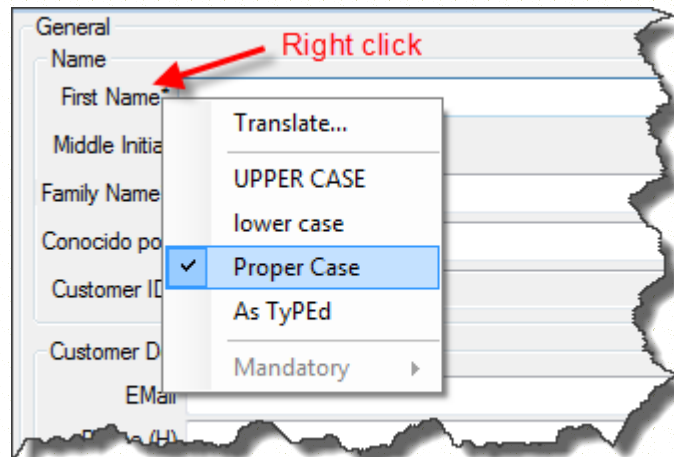
The screenshot shows the 'Options (All PCs)' dialog box with the 'Data Entry' tab selected. The 'Enforce Character Casing' checkbox is checked. Below it, the 'Default Employee on New Records' checkbox is unchecked. A section titled 'When new Store Related record is added...' contains two radio buttons: 'Put a Check Mark against All Stores' (selected) and 'Put a Check Mark only against Active Store' (unselected). At the bottom are 'OK' and 'Cancel' buttons.

Enforce Character Casing

If this box is checked, EVE will automatically apply character casing when you exit a textbox into which you have typed data. For instance, if you type “JOHN” into the First Name field on the Customer form and then exit the box, EVE will replace the text with “John”. Remove the checkmark from this box if you want EVE to leave the text unchanged.

If you choose to use character casing, you can still override its application in specific cases by right clicking on the label next to the text box and choosing one of the following options:

UPPER CASE, lower case, Proper Case, As TyPed.



Note: character casing only applies to boxes into which you type your own data; it does not apply to pick list boxes, as the text in those will always appear exactly as entered in the Data Module.

Default Employee On New Records

Use this option if you want the employee who is currently logged on, to be automatically assigned to new records when they are created. If this is not checked, the user will be forced to manually select an employee on new records.

Note: If you deselect the Can Change Employee privilege in Admin Privileges (i.e. The user cannot change the default employee) and also

	deselect Can Save Transactions with No Employees (i.e. The transaction must have an employee selected) in Sales Privileges, EVE will demand that an employee has been selected but will not allow the user to change the default employee on an invoice. If, in addition, you deselect the Default Employee on New Record option here, the user will be unable to complete transactions. At least one of these three options must be selected.
When New Store Related Record Is Added	<p>EVE supports multiple stores - i.e. your database can be located on a server on the internet and accessed by multiple locations (See Section 2.2.4.EVE) Some types of data in EVE relate to specific stores - for example, you may sell surf boards at one store near the coast but not at a second store inland.</p> <p>For these types of data, three alternatives are available when a new record is created:</p> <ul style="list-style-type: none"> ❖ Put A Checkmark Against All Stores ❖ Put A Checkmark Against All Stores except EVE OnLine Stores ❖ Put A Checkmark Only Against Active Store <p>When you create data items that can be assigned to stores, you can select whether or not the data items are automatically assigned to all stores or only the active store in which your PC is located.</p>

4.3.10 Groups Options

Use the Groups tab to determine how Groups within the Customers Module, Courses Module & Trips Module will be formatted. You may create groups, for instance, which include all family members or a group of friends, etc. who are likely to book onto courses or trips together.

The screenshot shows a window titled 'Options (All PCs)' with a tabbed interface. The 'Groups' tab is active. It contains two text input fields: 'Group Name Format' with the value '<GroupName> <Date>' and 'Date Format' with the value 'short date'. At the bottom right are 'OK' and 'Cancel' buttons.

Group Name Format	Enter the default Group Name Format that you want EVE to use when creating a group. By using a naming format, you can ensure groups are named consistently and this will speed your data entry. Group names are used when creating a block booking when Selling Courses (See Section 6.1.4.Selling Courses) or Selling Trips (See Section 6.1.5.Selling Trips).
Date Format	Enter the Date Format you want used in the above default.

4.3.11 Point of Sale Options

The Point of Sale tab can be used to inform EVE of Point of Sale hardware that is attached to the computer you are working on. E.g. you can indicate here that a cash drawer and customer pole display are attached.

Point Of Sale: Cash Drawer

Use the Point of Sale tab to define how your Point of Sale Cash Drawer hardware will behave.

The screenshot shows the 'Options (ISSYSVAIO)' window with the 'Point Of Sale' tab active. The 'Cash Drawer' sub-tab is selected. The 'Cash Drawer Type' section has five radio buttons: 'No Cash Drawer Attached', 'OPOS Cash Drawer Attached', 'Serial Cash Drawer Attached', 'Microsoft POS for .Net (Windows 7 or 8.1 or later)' (which is selected), and 'Pass-Thru' Drawer Attached'. Below these are two options: 'Use Control A Font' (selected) and 'Send Pop-Text to Printer'. The 'MS POS for .Net Cash Drawer' section has a 'Driver' text box containing 'CashDrawer' and a 'Browse' button. The 'Serial Cash Drawer' section has a 'Port' text box with 'COM1', a 'Handshaking' text box with '0', a 'Pop Text' text box with '27,112,48,32,32', and a 'Settings' text box with '9600,N,8,1'. The 'Pass-Thru' Cash Drawer section has a 'Pop Text' text box and a 'Printer' dropdown menu, both currently empty. At the bottom right are 'OK' and 'Cancel' buttons.

Cash Drawer Type

Five alternatives are available for Cash Drawer Types

- ❖ No Cash Drawer Attached
- ❖ OPOS Cash Drawer Attached
- ❖ Serial Cash Drawer Attached
- ❖ Microsoft POS for .Net (recommended)
- ❖ Pass-Thru' Drawer Attached

Choose the alternative which best represents your hardware. If you choose OPOS Cash Drawer Attached, the OPOS cash drawer fields will become available. If you choose Serial Cash Drawer Attached, the serial cash drawer fields will become active. If you choose Microsoft POS for .Net, the MS POS for .Net cash drawer fields will become active.

Some cash drawers operate in 'pass-through' mode - i.e. they attach to your receipt printer and the drawer is opened when you print a receipt. Some drawers of this type can be made to open by setting an option in the receipt printer's driver - you will need to read the instructions that came with your printer/cash drawer to see if this applies. Others can be made to open by adding some text to the receipt layout that uses a special font that the printer recognizes (sometimes called 'Control'). The text does not print on the receipt but it informs the cash drawer it needs to open. Others can be made to open by passing Pop-Text commands to the printer from EVE. These are a series of non-printable characters that the printer passes on to the cash drawer. If your cash drawer supports this option, choose 'Pass Thru' Drawer Attached', choose 'Send Pop Text to Printer', choose the name of the printer the drawer is attached to and enter the Pop Text as a series of comma separated ASCII codes. You will

	need to read the documentation that came with your printer/cash drawer to determine what commands are appropriate.
OPOS Cash Drawer Driver	Type the name of the Driver that is appropriate for your Cash Drawer. This will depend on the make and model and you will need to get the driver name from the instructions that came with the device.
Timeout	When EVE communicates with your Cash Drawer, it will wait for feedback from the device for a specified amount of time. If that time is exceeded, EVE will show an error indicating the device is not working properly. Specify the amount of time EVE will wait (in milliseconds - i.e. thousandths of a second) in this box.
Serial Cash Drawer Port	If your cash drawer has a serial cable and is attached to a COM Port other than COM1, change the Port to the appropriate value.
Handshaking	See the documentation that came with your cash drawer for values to enter for Handshaking parameters.
Pop Text	Whenever an appropriate payment method has been used on an invoice or refund, the cash drawer will open when the transaction is saved. To open the drawer, EVE sends a character string to the serial port. Enter a value in the Pop Text field for the characters to be sent to trigger it to open. Enter a comma-separated list of numbers that represent the ASCII characters to be sent. The default value shown (i.e. 27, 112, 48, 32, and 32) will work for drawers that comply with the ESC/POS standard. Some drawers may respond to the bell character, in which case you should enter the value 7 for the Pop Text.
Settings	See the documentation that came with your cash drawer for values to enter for Settings.
MS POS for .Net Driver	Click the Browse button and choose the appropriate driver name from the picklist. This assumes you have installed driver(s) using a disk from the cash drawer manufacturer or you have downloaded the appropriate driver from the internet.

Point Of Sale: Pole Display

Use the Pole Display tab to define how Point of Sale Customer Pole Display hardware will behave - i.e. the small screen that points towards the customer and indicates which items have been added to the shopping basket.

Pole Display Type	<p>Four alternatives are available for Pole Display Types</p> <ul style="list-style-type: none"> ❖ No Pole Display Attached ❖ OPOS Pole Display Attached ❖ Serial Pole Display Attached ❖ Microsoft POS for .Net (recommended) <p>Choose the alternative which best represents your hardware. If you choose OPOS Pole Display Attached, the OPOS Pole Display fields will become available. If you choose Serial Pole Display Attached, the serial Pole Display fields will become active. If you choose Microsoft POS for .Net, the MS POS for .Net Pole Display fields will become active.</p>
OPOS Pole Display Driver	Type the name of the Driver that is appropriate for your Pole Display. This will depend on the make and model and you will need to get the driver name from the instructions that came with the device.
Timeout	When EVE communicates with your Pole Display, it will wait for feedback from the device for a specified amount of time. If that time is exceeded, EVE will show an error indicating the device is not working properly. Specify the amount of time EVE will wait (in milliseconds - i.e. thousandths of a second) in this box.
Serial Pole Display Port	If your Pole Display has a serial cable and is attached to a COM Port other than COM1, change the Port to the appropriate value.
Handshaking	See the documentation that came with your cash drawer for values to enter for Handshaking parameters.
No. of Lines	This field is available when Serial Pole Display is selected above. EVE only currently uses one line of the display. The # of Lines field is disabled at all times.
Settings	See the documentation that came with your cash drawer for values to enter for Settings.
MS POS for .Net	Click the Browse button and choose the appropriate driver name from the

Driver	picklist. This assumes you have installed driver(s) using a disk from the pole display manufacturer or you have downloaded the appropriate driver from the internet.
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Point Of Sale: Credit Cards

Use the Credit Cards tab to define how your Point of Sale Credit Card software will behave. If you have an Internet connection, EVE can send credit card information down the wire to the credit company when an invoice is saved. For this to work you need to use third party software. At time of writing this requires one of the following pieces of software to be installed:

- “Genius” from Cayan (formerly Merchant Warehouse) (www.cayan.com)
- “Transport.WEB” from Cayan
- “X-Charge” from OpenEdge (formerly Accelerated Payments) (www.OpenEdge.com)

For legacy reasons, EVE currently also supports “Transport” from Cayan but, if you currently use this, we strongly recommend upgrading to Genius or Transport.WEB.

All work in North America.

If you choose TransPort, there are no additional options.

If you choose TransPort.WEB, there are additional options.

Merchant Name, Merchant Key, Merchant Site ID	All of these will be assigned to you when you sign up for an account with Cayan.
Credit Card Page	You can leave this set to the default value of transportweb.aspx
Default Entry Mode	Enter your preferred value: 1=Keyed. Use this if you will always type the credit card number, expiry date, etc. 2=Swiped. Use this if you will usually swipe the credit card but may need to key in the card details sometimes 3=KeyedSwiped. Use this if you will usually key in the card details but may

	need to swipe the credit card sometimes
Cardholder Name / Address and Zip	<p>When you key in card details (as opposed to swiping a card), you will be prompted to enter Cardholder name, Street Address and Zip Code as well as the card details. Put a tick in the Cardholder Name box if you want EVE to populate the Cardholder field with the First and Last name of the customer in EVE.</p> <p>Put a tick in the Address and Zip box if you want EVE to populate the Street address and Zip code with the address details of the customer in EVE.</p>

If you choose X-Charge there are additional options.

Merchant ID	This will be assigned to you when you sign up for an account with OpenEdge
File Folder	<p>When a credit card transaction is processed, X-Charge saves the results of the transaction into a file in the folder specified here. Both X-Charge and EVE need to use the same folder.</p> <p>The default folder is c:\Program Files\X-Charge\LocalTran</p>
X-Charge Client	You need to specify the location of the X-Charge client program. By default this is: C:\Program Files\X-Charge\XCharge.exe
User ID	You can choose which user ID to use when communicating with X-Charge. The default is User1. The value must correspond to a userID defined in X-Charge.
Password	You can choose which password to use for the user specified above when communicating with X-Charge. The value must correspond to a password defined in X-Charge.
Timeout	When processing a credit card transaction, EVE will wait for a specified amount of time before it decides there is a problem in communicating with X-Charge. Indicate the amount of time you want to wait in seconds before EVE reports an error. We recommend you set this value high - e.g. to 180 seconds or larger. Otherwise there is a danger that EVE will timeout and report an error while X-Charge continues to process the transaction to completion in the background.

If you choose Genius, there are additional options.

Merchant Name, Merchant Key, Merchant Site ID	All of these will be assigned to you when you sign up for an account with Cayan.
Genius Device IP	<p>You can find the IP address of the Genius device as follows:</p> <p>1/ press the 0 button 3 times on the device.</p> <p>2/ at the prompt, enter the admin password (supplied to you by Cayan).</p> <p>The IP Address is shown at the top of the display.</p>
Display Items on Genius device	Put a tick in the box if you want items added to the shopping basket in EVE to show on the Genius device so the customer can see the price and item description.

4.3.12 Labels Options

Use the Labels tab to define how your labels will print. You can print labels in one of 3 ways.

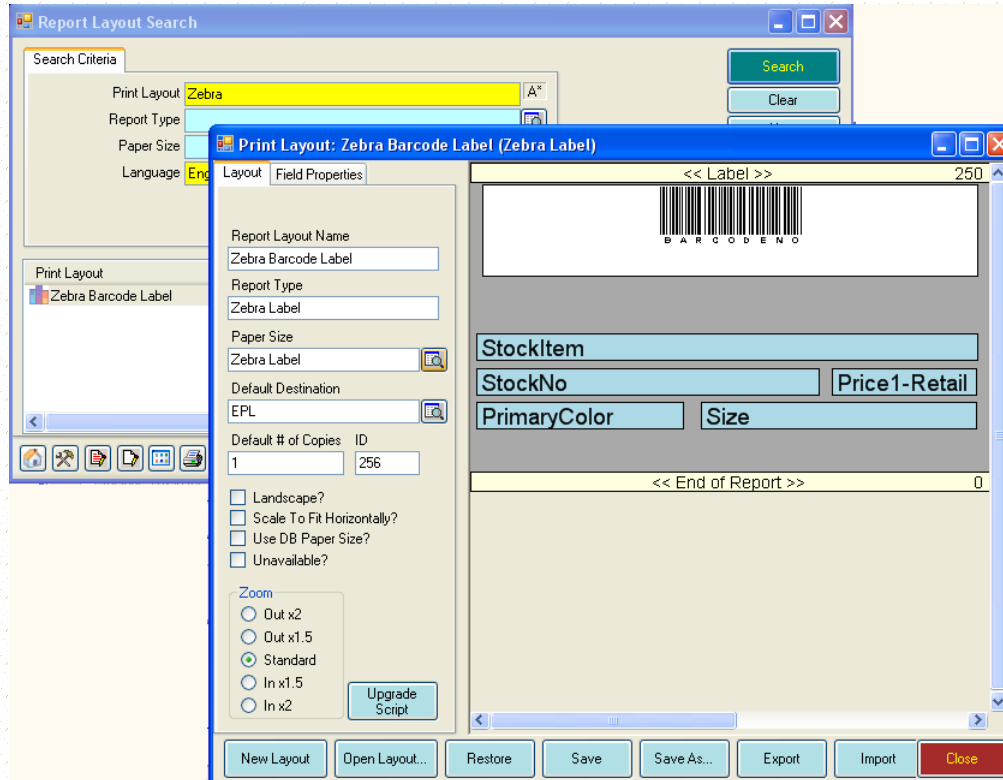
- ❖ Using your regular desktop printer: You will need to have Microsoft Word installed and a suitable barcode font (EVE installs a suitable selection of fonts for you courtesy of IDAutomation.com). You can print multiple labels on a sheet of Avery (or equivalent) labels.
- ❖ Using a dedicated Zebra barcode label printer (we recommend Zebra LP2844 or Zebra TLP2844): EVE communicates directly with the printer firmware so this is a fast option and prints the best quality barcodes. If you choose this option, make sure you purchase a printer with a USB or Parallel cable. Also make sure you purchase the model number exactly as indicated above since Zebra also sell models with a Z suffix - those are not directly supported by EVE. E.g. LP2844 works well with EVE, LP2844-Z works less well (it will still work but the best quality barcodes will not be printed).
- ❖ Using a different make of dedicated barcode label printer.

Print Method	<p>Two alternatives are provided for printing labels:</p> <ul style="list-style-type: none"> ❖ Print labels immediately (recommended if using a dedicated label printer) ❖ Add labels to queue for printing later (recommended if using Microsoft Word for Windows) <p>Choose the alternative which best reflects your hardware.</p>
Barcode Prefix	<p>Barcode numbers need to be printed with a character before and a character after to indicate to the barcode scanner that all data has been detected - without them the barcode will not be read successfully by your scanner. You can specify the character to use - this will typically be the same for the prefix and the suffix. Usually an asterisk (*) is used for both. If you are using a Zebra printer, you should leave both entries blank since the printer will handle all barcode processing for you.</p>
Barcode Suffix	
Template File	<p>If you are going to use Microsoft Word to print the labels you need to define which Word document will be used as the template. The default is "Stock Item Avery5160 Template.doc". This, as the name suggests, is based on the Avery 5160 template. If you want to use a different label type, please use Microsoft Word to create a new template.</p> <p>NOTE: Avery5160.doc uses the IDAutomation.com barcode font to print the barcode. This is a Code 39 True Type font.</p>
Include Tax In The	<p>Put a check mark in this box if you want tax to be included in the price that is</p>

Unit Price	shown on the label.
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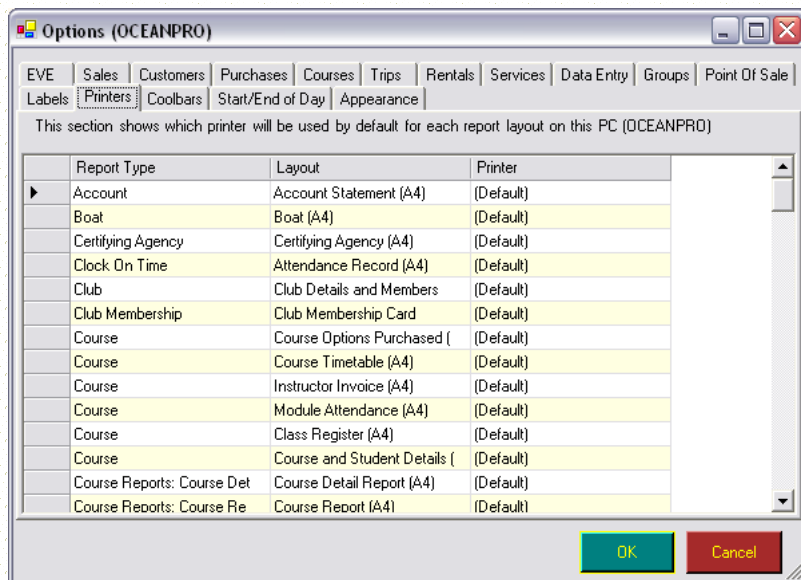
Labels: Label Layout(s)

If you have a Zebra printer that uses the EPL programming language, click on the **EPL Label Layout(s)** button at the bottom of the Labels tab on the Options form to view the Zebra Label print layouts. See Section 18.1 for information about Print Layouts.



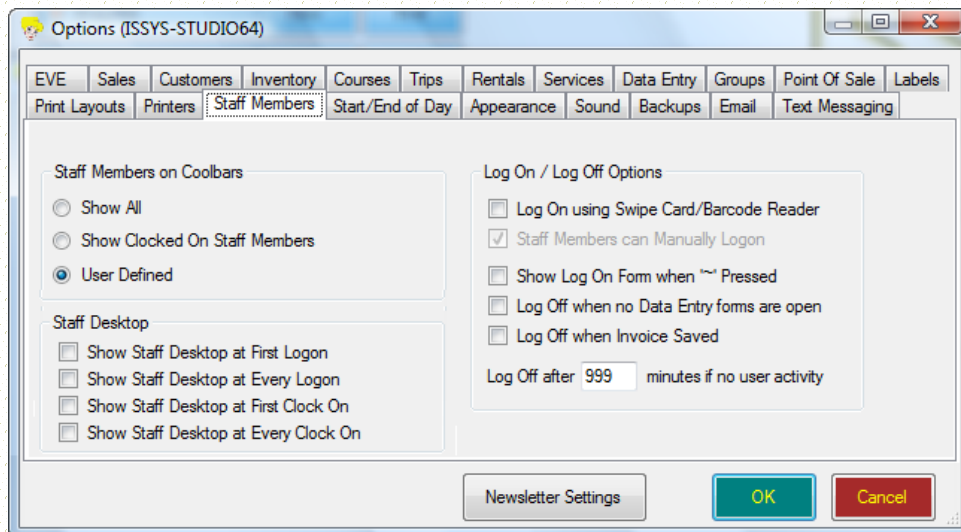
4.3.13 Printers Options

Use the Printers tab to assign a default printer to each report type in EVE. You will not usually need to change information on this tab as EVE automatically assigns a printer to a report type when you first print it (See Section 18.2.Reports). EVE lets you have different printers assigned to different report types so, for example, on the same PC you could send invoices to the Receipt printer attached to the Serial port and Course Timetables to the Desktop printer attached to the USB port, etc. EVE remembers which printer you want to use for each report type and defaults to that printer each time. If you want to change which printer is used for a particular report type by default, then you would need to use this tab. If the text in the Printer column reads '(Default)' then the default printer assigned in your Windows Control Panel will be used.



Report Type	This is read-only and indicates the type of report - for example, Invoice or Purchase Order, etc
Layout	This is read-only and indicates the report layout. For example you may have 2 layouts for the invoice report type, one that prints condensed receipts to a small receipt printer, and one that prints extended receipts to a desktop printer.
Printer	Pick the printer from the pop up list box that you want to use by default for the report type. All printers that are accessible from the PC are listed - including those installed on the PC and those shared printers on the network.

4.3.14 Staff Members



Staff Members on Coolbars	Three alternatives are provided for Cool Bar display (Cool Bars are the vertical bars that appear on the right hand side on certain data entry forms, for example, Invoice, Purchase Order, etc.): ❖ Show All
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	<ul style="list-style-type: none"> ❖ Only Show Clocked On Staff Members ❖ User Defined <p>If you want all Staff Members to be displayed in the Employees section of the Cool Bar, choose Show All. If you want only those Staff Members who are currently clocked on to EVE to be displayed, choose Only Show Clocked on Staff Members. Staff Members will be required to clock on in order to be shown on the Cool Bars.</p> <p>Alternatively, you can choose User Defined and then right click on the background of the Cool Bar when the Employees section is active and click Add to add other Staff Members to the bar.</p>
Staff Desktop	<p>The Staff Desktop is the form that shows information relating to each staff member - e.g. their tasks, teaching schedule, scheduled contact calls, etc. It can be loaded at any time by clicking on its icon on the main EVE toolbar. In addition, you can choose to have it open automatically in certain circumstances. Choose 'Show Staff Desktop at First Logon' if you want it to show the first time each staff member logs on for the day. Choose 'Show Staff Desktop at First Clock On' if you want it to show the first time a staff member clocks on for the day.</p>
Log On / Log Off Options	
Log On Using Swipe Card/Barcode Reader	<p>You can purchase Staff Member cards from EVE Diving to allow Staff Members to log on to EVE by swiping their card through a reader. Barcode or magnetic stripe information on the card holds the login details. Put a check mark in this box if you want the Login box to default to "swipe" mode rather than "typing" mode when it is shown.</p>
Staff Members can Manually Logon	<p>You may want Staff Members to be able to type their username and password in addition to using their swipe card. Alternatively, you may want to insist that they always use their swipe card.</p>
Show Log On Form When ~ Pressed	<p>The Log On form is shown when you first start up EVE. You can also bring up the Log On form by selecting Switch User from the File menu or by pressing the F7 key. If you also want this form to be displayed when you press the ~ key, ensure this checkbox is checked. This can be used in conjunction with the option above - the login information held in the barcode or magnetic stripe on the Staff Member card may have a ~ prefix informing EVE that a user is logging on so the Login box is opened automatically when a card is swiped.</p>
Log Off When No Data Entry Forms Are Open	<p>When a Staff Member is logged on, it is their privileges that determine what actions can be performed in EVE. Therefore, if you have a high requirement for security, you may consider having EVE log Staff Members off after every transaction.</p> <p>Check the Log Off When No Data Entry Forms Are Open checkbox if you want EVE to show the Log On form when no data entry forms are open. This locks EVE until a valid user logs on again.</p>
Log Off When Invoice Saved	<p>Check the Log Off When Invoice Saved checkbox if you want EVE to show the Log On form after each transaction is saved. This locks EVE until a valid user logs on again.</p>
Log Off After ____ Minutes If No User Activity	<p>If you want EVE to automatically log the user off after a period of inactivity, enter in the number of minutes here. The default is 999.</p> <p>Check this checkbox if you want EVE to show the Log On form after a set period</p>

of time. This locks EVE until a valid user logs on again.

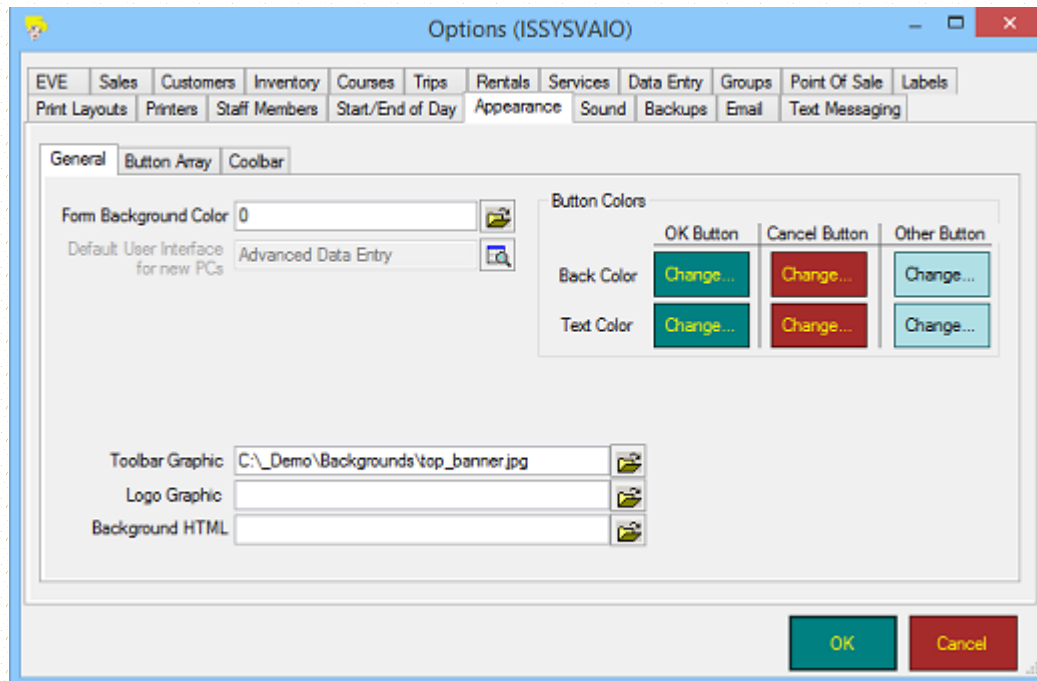
4.3.15 Start/End of Day

If you always open the store with the same cash float in your cash drawer(s) you can use the 'Set Default Opening Cash Drawer Balances' button to inform EVE of the number of bills of each denomination that will be in each drawer.

If you are a large store with a large number of Staff Members, you may want to restrict the times that reports can be run. Reports, by their very nature, may need to access a lot of data and that can slow down EVE. If this is going to impact the speed of data entry by other Staff Members you can enter a time range in the two boxes to indicate when reports can be run. The default is 12:00am to 11:59pm - i.e. reports can be run at any time of day.

4.3.16 Appearance Options

Use the Appearance tab to define the look and feel of EVE.



Form Background Color

By default, all Data Entry and Search forms, etc. in EVE have a gray background. Use this option to choose a different color. Click on the button to the right to choose a color from a popup dialog box or type the value 0 to return the color to its default gray color.

You may find this a useful option if you intend to use both the live 'eve' database and the 'eveTraining' database. To avoid confusion as to which database EVE is currently using, you could choose a different Form Background Color for each database.

Default User Interface For New PCs

Choose which of the User Interface Configurations (See Section 4.4.34. User Interface Configurations) will be used when a new PC is used to run EVE. If you want to change the User Interface Configuration used by an existing PC, open that PC in the Data Module.

Button Colors: OK Button

Choose the colors you want to use for the background and foreground of EVE buttons.

Cancel Button

The Back Color is the background color of the button - i.e. in the screenshot

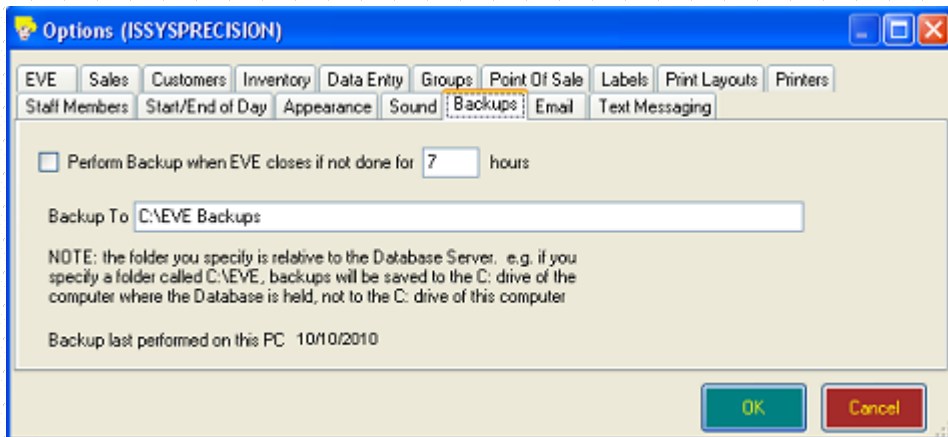
Other Button	above, the Back Color of the OK Button is green.
New Button	The Fore Color is the color of the text on the button - i.e. in the screenshot above, the Fore Color of the OK button is yellow.
Find Button	
Toolbar Graphic	By default, EVE has a green slate background on its toolbars on the main form. You can change this by choosing a different bitmap file.
Background Graphic	By default, EVE does not have a graphic in the Button Array area. You may want to display your store logo there, in which case you can choose the appropriate graphic file.
Background HTML	Rather than using a graphic as the main background to EVE, you may choose to use an HTML file instead. The HTML file could contain graphics and links of your choice.
Coolbar Colors: Section	Choose the colors you want to use for the background and foreground of those buttons on Coolbars that act as section headers and those that represent Items in each section.
Coolbar Colors: Item	
New Button Style	Buttons can appear in 4 styles: Flat, Popup, Standard and System. Choose which you prefer from the popup list. Different versions of Windows render different types differently so you may want to choose a different button type on different PCs.
Find Button Style	
Array Button Graphic	By default, buttons in the Button Array have a wavy blue background. You can choose a different graphic file here or set to '[Default]' to use the default graphic.

4.3.17 Sound

Play Sounds	Different transactions in EVE have sounds associated with them (for example, when an invoice is saved, a cash register bell is played). Check this checkbox if you want to Play Sounds.
Reminders	Check this box if you want EVE to play a sound when the Reminders form is shown.
Form Locked	Check this box if you want EVE to play a sound when the user attempts to make a change to a record when the form is locked.
Invoice Saved	Check this box if you want EVE to play a sound when an invoice is saved.
EVE OnLine Sale	Check this box if you want EVE to play a sound when a sale is completed in EVE OnLine.
EVE Speaks	EVE can talk to you in certain circumstances. Put a check in this box to turn on this feature.
Reminders	Check this box if you want EVE to speak the name(s) of the staff member(s) for whom the reminder is shown.
Form Locked	Check this box if you want EVE to tell you when you attempt to make a change to a record when the form is locked.
Welcome	Check this box if you want EVE to welcome you when she starts

Goodbye	Check this box if you want EVE to say goodbye when she closes
Item Added to Shopping Basket	Check this box if you want EVE to read the description of an item when it is added to the shopping basket
EVE OnLine Sale	Check this box if you want EVE to tell you when an EVE OnLine sale is made.
When a Course is Sold	Check this box if you want EVE to read your specified text when a course is sold. The default text is 'Welcome to the World of Diving'
When an Invoice is Saved	Check this box if you want EVE to read specified text when an invoice is saved. The default test is 'Thank you for shopping with us at <DiveStore>'

4.3.18 Backups



Use the Backups tab to define database backup options.

Perform Backup when EVE closes	Check this box if you want EVE to take a backup when EVE closes.
...if not done for _ hours	If you frequently open and close EVE, you may not want a backup to be taken every time EVE closes. You can specify a number of hours here and EVE will only start the backup if one has not previously been taken within that number of hours. The default value is 7 hours.
Backup To	Specify the folder you want the backup created in. Note: when you ask EVE to perform a backup, EVE passes on the request to SQL Server. SQL Server actually performs the backup and so the backup file is created in a folder on the SQL Server computer, NOT the computer you are using.

4.3.19 Email

There are various ways you can send emails using EVE. In some cases, EVE communicates with Microsoft Outlook or MailChimp - e.g. if you're sending marketing emails. In other cases, EVE sends emails directly with no interaction with Outlook - e.g. if you're emailing a receipt to a customer. In the latter case, EVE needs to know some information about your email setup. Outlook users can find this information by clicking Tools then Accounts then Properties in Outlook.

Outgoing Mail Server (SMTP)	Specifies your Simple Mail Transfer Protocol (SMTP) server for outgoing messages. You can get this information from your Internet Service Provider (ISP) or local area network administrator.
Server Port Number	Specifies the port number you connect to on your outgoing email server. The port number is usually 25. Use -1 if your account does not require a port to be defined.
From Address	The address your emails will come from. When the recipient clicks Reply to your email, this is the address it will be returned to.
Use EVEMail for ad-hoc emails	Tick this box (recommended) if you want to use EVE's email client when sending emails from the Customer form. Leave the box unticked if you want EVE to use the default email client on your PC.
Send EVEEmails as HTML by default	Emails can be sent as plain text or as HTML. HTML format lets you insert formatting and images, etc.
Server requires secure connection (SSL)	Specifies whether to use the Secure Sockets Layer (SSL) security protocol when connecting to the email server. The administrator or ISP for the server will indicate if the SSL requirement exists.
Server requires authentication	Specifies whether a username and password are required for the email account.
SMTP Username	If your email server requires authentication, enter the Username here
SMTP Password	If your email server requires authentication, enter the Password here

Newsletter From	If you use the NM Newsletter functionality (i.e. the ability to send Newsletters and other pre-defined emails) enter here the email address the emails will be From and Reply Address. Please confirm with EVE Diving what these should be set to since EVE Diving will automatically handle any bounced (i.e. undeliverable) emails and will also automatically handle customers unsubscribe requests - provided the correct mailbox is specified.
Newsletter Reply Address	
Ticketing	<p>If you use Microsoft Outlook you can manage emails sent to your store using EVE. Emails will appear in EVE and will be automatically linked to the appropriate customer record (provided they were sent from an email address that is on an existing customer record in EVE). You can reply to emails straight from EVE and use EVE reports to see which emails have been replied to, who replied and what the reply was.</p> <p>Contact EVE Diving for more information.</p>

4.3.20 Text Messaging

If you choose the Skype option, you can send personalized text messages to your customers in bulk. To do this, select multiple customers on the Customer Search form or Customer Search Wizard, right click on the selected area and click Text Message. In the popup box, type your message and include [FirstName] in the text. EVE will replace this with the first name of each customer.

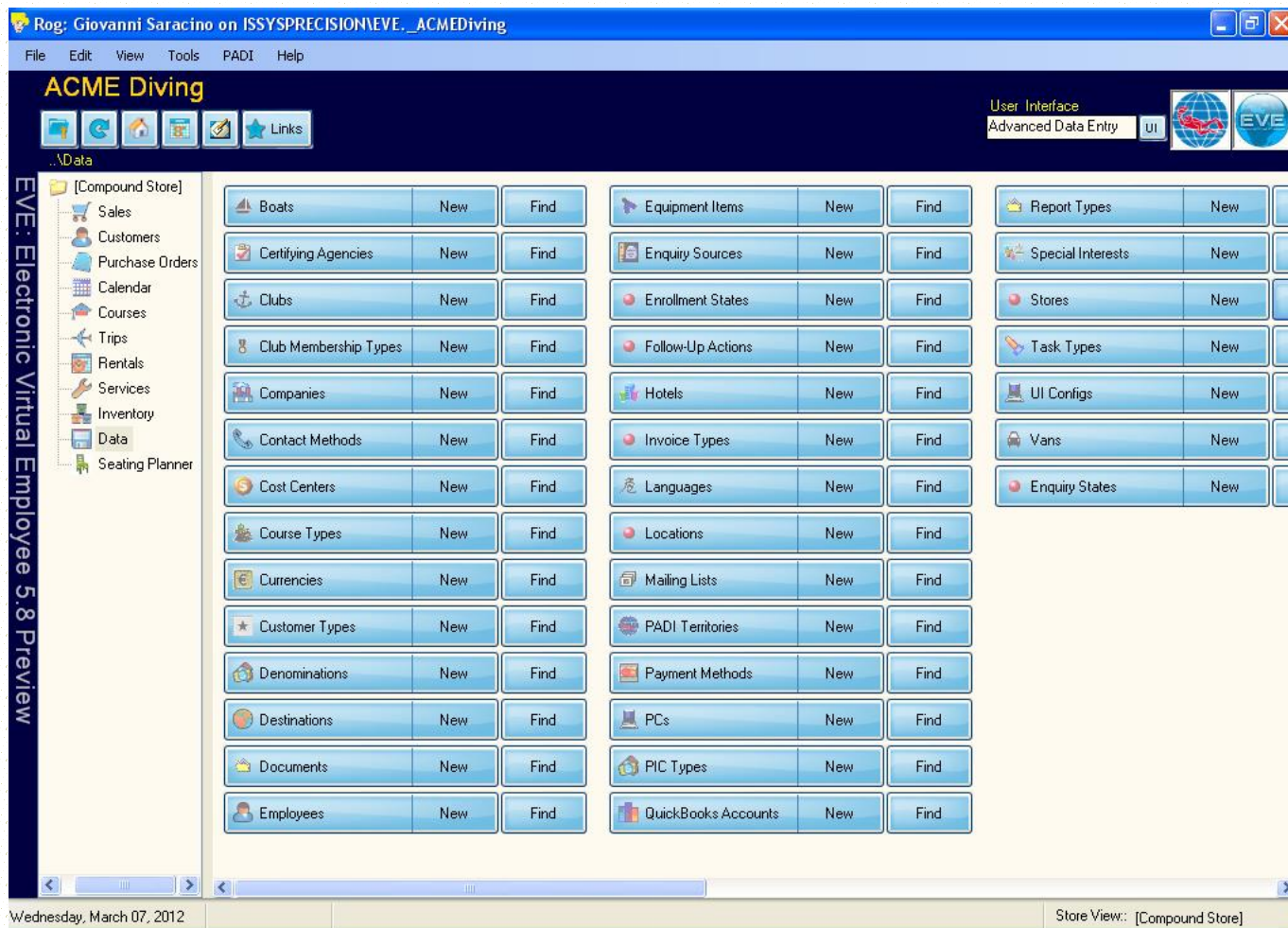
In EVE, click on the yellow question mark symbol to get a description of each field on the form.

4.4 Defining Static Data

The next task to perform is to define your static data - this is the data that will appear in pop up list boxes throughout the application.

Static data needs to be set up once when you install EVE and will then remain largely untouched.

To define your static data, load the Data Module if you have not already done so. A list of all data types available will be shown in the Button Array. Click **New** from any data type to add a new data element. Click **Find** to search for an existing data element.



When you click **New**, a form will appear allowing you to create new information.

Some static data has been pre-loaded into the database. Other static data that is specific to your store will need to be added. To review the static data that has already been loaded into EVE, select a data type and click the **Find** button. A Search box will load. Click the **Search** button and all preloaded information will be listed in the Search results.

Four fields are shown on most of the static data records. These fields are described below and not repeated in each section.

ID	This is a system-generated number created by EVE when a new record is saved. It remains unaltered for the lifetime of the record and uniquely identifies the record.
Unavailable?	This is used to mark records so that they will no longer appear in pop up list boxes elsewhere in EVE. It acts as a 'logical deletion'. You may want to set this value if, for instance, an instructor leaves your store. You should not physically delete the instructor from the database as then all certification records on which (s)he was the instructor would lose their instructor reference. When the instructor is made Unavailable, all customer certifications remain unchanged but the instructor's name will no longer appear in the pop up list box to add to new certifications.
Created	This is maintained by EVE and is not editable. It indicates the date and time that the record was originally created.
Last Updated	This is maintained by EVE and is not editable. It indicates the date and time

that the record was last updated.

4.4.1 Boats

You will use the Boats section to enter information about any boats on which you book day trips or charters (See Section 10.2.1.Creating a New Day Trip/Charter). You may choose to enter boats that belong to your operation or to enter information on all boats (even those owned by third parties) on which you book trips.

General

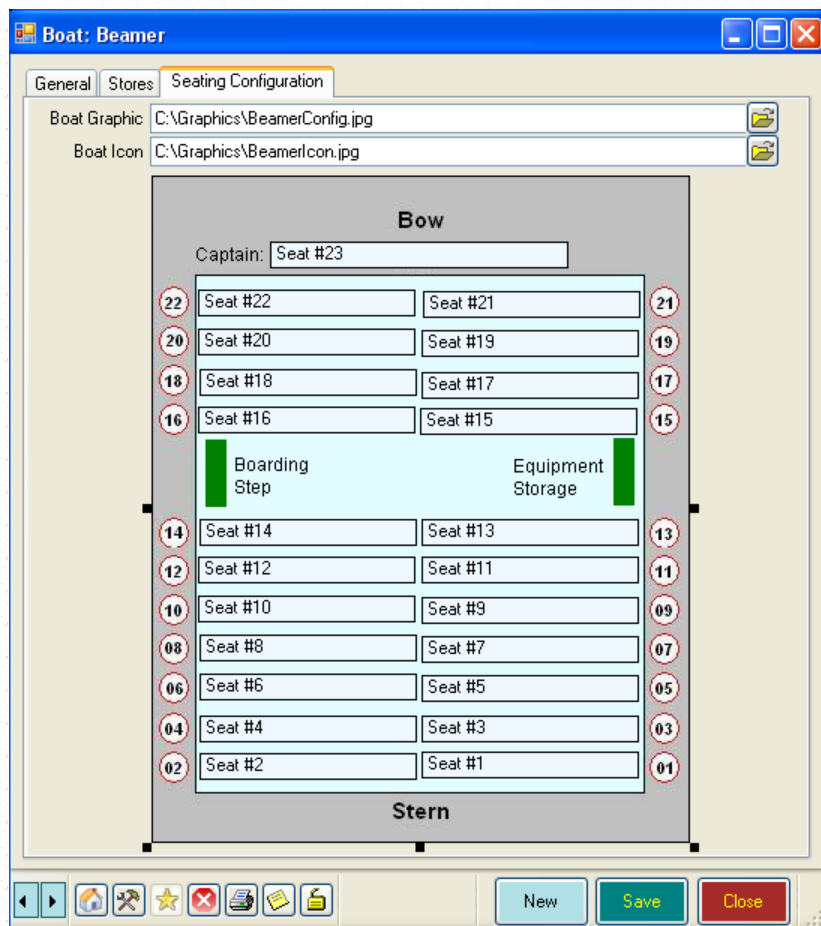
Boat Name	Enter the Boat Name.
Prefix	The Prefix is a quick reference code which you can use when Setting Trip Options (See Section 4.3.6.Trips Options) to auto-generate a trip number.
Min Number	Enter the minimum number of customers that the boat will go out with. When creating trips/charters you may only want to go ahead with a particular trip if the minimum number of passengers has been reached. The minimum number you set here will automatically default for any day trip using this boat (See Section 10.2.1.Creating a New Day Trip/Charter).
Max Number	<p>Enter the maximum number of customers as a number. The Maximum Number should reflect the total number of passengers (divers and non-divers) including any staff that you wish to assign to the boat.</p> <p>EVE will use the Max Number as the default maximum number of customers allowed on a trip/charter when you are Creating a New Day Trip / Charter (See Section 10.2.1.Creating a New Day Trip/Charter).</p>
Call Sign	Enter the Call Sign for the boat.
Notes	Enter any Notes that are specific to the boat.
Calendar Colors	Choose your Calendar Colors for the boat. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this boat. This is useful so you can quickly see in the Calendar, which trips/charters relate to which boat.
URL	If you have a webpage with information about your boat you can enter the appropriate URL. In the Calendar, you can export information to HTML so you can show the trip timetable on your website. If you have specified a URL for the boat, EVE will automatically create a link in the HTML file to the boat's page so web users can see information about the boat by clicking on a link.

Stores

Check the Stores that have access to this Boat. E.g. if store 1 can sell places on the boat but store 2 cannot, put a check mark next to store 1 but not store 2. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

Seating Configuration

Use the Seating Configuration tab to provide a graphical representation of the seating on the boat. This will be used when you're using the Seating Planner to assign customers to seats on the boat.



Boat Graphic: Enter the location of a graphics file that contains a graphical representation of the boat seating plan.

EVE will add the same number of pale blue boxes to the layout shown on the Seating Configuration page as you have defined for the Max Number of places on the General tab. In the graphic above, Max Number is defined as 23 so EVE added boxes marked Seat #1, Seat #2, ... Seat #23 to the layout. You can use your mouse to reposition the boxes so they align correctly with your layout graphic. When you use the Seating Planner, EVE will show the same representation of the boat so you can drag-drop customers onto the appropriate seat.

Boat Icon: Enter the location of a small graphics file that will be displayed on the boat in the Event Planner so you can quickly distinguish one boat from another on the Planner.

Thrust 07 Mar 9:24 AM
3 of 20 places taken. 17 place(s) available
Staff: None

2 Tank Dive
[Drag Customer Here to Add]

1 Tank Dive
[Drag Customer Here to Add]

x1
▼

x2
▼

Day Trip 9:24

4.4.2 Certifying Agencies

General

Use this data type to maintain Certifying Agencies. EVE has one pre-defined item: PADI. You will use Certifying Agencies when creating new Course Types (See Section 4.4.8.Course Types). If you run PADI swim lessons you could add a Certifying Agency called e.g. PADI Swimming to help distinguish between diving and swimming courses.

Certifying Agency: PADI

General
Stores

ID 1
Cert. Agency* PADI
Contact

Address

Line 1 30151 Tomas Street
Line 2
Line 3 Rancho Santa Margarita
Line 4 CA
Postcode 92688-2125
Country USA

Contact Details

Telephone 949-858-7234
Fax
Email
Web www.padi.com
☐ Unavailable?
Created 23/04/2004 10:51:45 AM
Last Updated 08/01/2006 12:00:00 AM

New Save Close

Cert Agency	Enter the name of the Certifying Agency.
Contact	Enter your primary Contact person at the agency - for example, the Regional Manager.
Add Line 1	Enter the full Address details for the certification agency.
Add Line 2	
Add Line 3	
Add Line 4	
Post Code	
Country	Enter the full Contact Details for the certification agency.
Contact Details	
Telephone	

88

Fax	
Email	
Web	

Stores

Check those Stores that have access to this certifying agency. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.3 Clubs

If you run Clubs at your dive center, enter details here. You use clubs to track your customer participation in one or more dive clubs (See Section 7.2.2.Adding Club Memberships).

General

Club Name	Enter the name of the club.
Next M/Ship #	Enter the next membership number for club members. This field will be used to automatically generate membership numbers as club members are assigned. It will update as new membership numbers are assigned.
Notes	Enter any comments that are relevant about the club
EVE OnLine Club	If you use the companion product to EVE, called EVE OnLine (EVE OnLine lets you sell your products, courses and trips on-line) you can make the Club available to EVE OnLine so that your customers can log in to the Club section and view information about their course and trip enrollments, their equipment and purchases.

Stores

Check those Stores that have access to this club. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only the active Store for this PC is selected.

Members

Customer	Tel (Home)	Tel (Mobile)	Email	Membership #	Membership Type	Start Date
Jason Cox	431-3745		jasoncox01@hotmail.co		Individual	6/10/2013
Justin Dabdie	512-517-6584		jdabadie@advanceddent	1287	Family	4/2/2014
Kristofer Dickson	512-900-9442		kdickson@austin.rr.com	1275	Individual	5/28/2011
KIRK GAA	512-852-1520		kirkgae@yahoo.com	1285	Family	4/1/2014

The Members tab lists all customers who have been identified as members of this specific dive club. You can use this page after members have been assigned to email all club members details of the next club night or to print membership cards, etc. You can add Club Members in the Customers Module (See Section 7.2.2.Adding Club Memberships) or by Selling Club Memberships (See Section 6.1.11.Selling Club Memberships) or by clicking the Add... button.

4.4.4 Club Membership Types

If you run a club you may have different Club Membership Types (for example, Gold, Silver, Bronze, etc). Enter the different types here. You will assign club members a specific membership type in the Customers Module (See Section 7.2.2.Adding Club Memberships).

General

Membership Type: Gold

General Stores

ID: 3 Unavailable? ☐

Membership Type*: Gold

Created: 22/04/2004 4:25:16 PM
Last Updated: 08/03/2005 3:46:59 PM

Membership Type	Enter a description of the Membership Type.
------------------------	---

Stores

Check the Stores that have access to this membership type. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.5 Companies

You may wish to track the Companies that your **customers** work for (See Section 7.2.1.Adding General Customer Details). This is particularly useful if you want to access your customer base to market to specific organizations. You can identify which customers work for the company and ask for their assistance in marketing efforts. Please note: this data element should not be used to track your organization's companies (See Section 4.4.7.Cost Centers) and should not be confused with Suppliers which represent those companies you purchase goods from.

General

Company: COMMERCIAL DIVER

ID24

Company NameCommercial Diver

Address

Line 1

Line 2

Line 3

Line 4

Postcode

Country

Contact Details

Contact

Telephone

Email

Web

Notes

☐ Unavailable?

Created11/18/2008 5:28:48 PM

Last Updated11/18/2008 5:28:48 PM

New

Save

Close

Company Name	Enter the full Company Name.
Add Line 1	Enter the full Address details for the company.
Add Line 2	
Add Line 3	
Add Line 4	
Post Code	
Country	
Contact	Enter the name of the primary contact at the company
Telephone	Enter the Contact Details for the company.
Email	
Web	

4.4.6 Contact Methods

Enter standard Contact Methods that are used by you to contact customers. You use contact methods to schedule and track customer calls (See Section 7.2.13.Scheduling Contact Calls). EVE comes preloaded with several Contact Methods.

Contact Method: Email

ID2

Contact MethodEmail

Calendar Colors

Use this section to set the colors that will represent the Contact Method in the Calendar

Fore Color

Back Color

☐ Unavailable?

Created22/04/2004 4:06:55 PM

Last Updated20/09/2005 8:26:32 AM

New

Save

Close

91

Contact Method	Enter a description of the Contact Method.
Calendar Colors	Choose your Calendar Colors for the data element. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this contact method. E.g. you could configure the calendar so all scheduled contact calls appear in red while scheduled mailings appear in blue, etc.

4.4.7 Cost Centers

Some dive centers run their business using more than one company or ‘cost center’. For instance, they may have one company to handle shop sales and another to handle training or they may treat each store location as a separate company. EVE supports this using Cost Centers. Set up one cost center for each company. Each can have its own sales tax registration number.

When you set up your Stock Types (See Section 5.1.6.Stock Types) you must assign each to one or more cost centers. When an invoice is created in the Sales Module (See Section 6.1.1.Selling Stock Items), all Stock Items added must belong to the same cost center.

If you have e.g. 2 stores that are in different States or Countries and are therefore subject to different sales taxes, you will use a Cost Center for each. Associate the appropriate Tax Band with each Cost Center on each Stock Type form.

General

Cost Center	Enter the name of the Cost Center (company).
Company #	Enter the Company #. This may be printed on invoices and purchases orders. The number is that assigned when you first set up the company - it is not applicable to some regions.
Tax Reg #	Enter the Sales Tax Registration #. This may be printed on invoices and Purchase Orders.
Slogan	Enter a company Slogan you want to appear on invoices. This can be any text you choose - for example, “Dive Safely” or “As Seen on TV”, etc.
QuickBooks File	If you export data to QuickBooks (See Section 19.QuickBooks), you need to inform EVE which QuickBooks file will receive data relating to this cost center. You may have different QuickBooks company files for each company.

Stores

If you have multiple stores defined and/or multiple cost centers you must indicate which cost center(s) are used at which store. The same cost center can be used at more than one store, and the same store can have more than one cost center.

Check the Stores that have access to this cost center. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only the active Store for this PC is selected.

4.4.8 Course Types

Define the Course Types taught at your center. EVE comes pre-installed with PADI courses. You may want to add your own distinctive specialties or any courses you teach outside of the PADI system. Course Types are used to categorize or group individual courses together (See Section 9.1.1.Creating a New Course).

General

Course Type	Enter the Course Type, e.g. Open Water or Advanced Open Water, etc.
Prefix	Enter a Prefix to use in the course number (for example, OW for Open Water, AOW for advanced Open Water, etc). The Prefix can be used to auto generate a course number when setting up individual courses (See Section 9.1.1.Creating a New Course).
Min. Number	Enter the minimum number of customers that are required before you will run a course of this type. Min Number defaults to this number when you are Creating a New Course (See Section 9.1.1.Creating a New Course).
Max. Number	Enter the maximum number of customers that can be registered on a course. EVE will issue a warning message if you try to enroll too many customers in a course. Max Number defaults when you are Creating a New Course (See Section 9.1.1.Creating a New Course).
Certifying Agency	Pick the Certifying Agency. You could have one for PADI diving and one for PADI Swimming.
Prerequisite Course	If customers must complete another course before being allowed to attend courses of this type, pick the Prerequisite Course from the pop up list box. When a customer has completed a course, you can then configure EVE to add

	interest in follow-on courses to customers completing the prerequisite.
Default Instructor	<p>If you consistently use a specific instructor to run a particular course, enter that instructor here.</p> <p>When you are Creating a New Course (See Section 9.1.1.Creating a New Course), this instructor will automatically be defaulted.</p>
Video	<p>If you have training videos in a compatible format (AVI or mpeg) that you want to show to customers to tempt them onto a course, enter the filename here. You can play the Video at a later date using the Play Video option in the Courses Module or Sales module.</p>
Certification Priority	<p>Put a number in this box if you want the course type to be included in those that indicate a customer's certification level once qualified. For instance, Open Water has a certification priority but Drift diver does not. If a customer has more than one certification, that with the highest Certification Priority will be indicated in yellow in the Certifications section of the Customer form (See Section 7.2.5.Adding Certifications).</p> <p>The following course types have a Certification Priority pre-defined:</p> <ul style="list-style-type: none"> ❖ DSD - DSD Course ❖ Open Water Diver ❖ Advanced Diver ❖ Rescue Diver ❖ Divemaster ❖ Instructor ❖ IDC Staff Instructor ❖ Course Director
Uploadable To PIC?	Whether certifications of this course type can be uploaded to PADI using On-Line PICs (See Section 9.2.4.PIC).
PIC Key	<p>The PIC Key is required by PADI to process certifications using PIC Online. You will not usually need to change this value. EVE comes preloaded with the PIC Keys for PADI courses. If PADI introduce a new Course Type, you can click the Search PADI for PIC Keys button to find the PIC Key to use.</p>
PIC Type	<p>The PIC Type indicates which 'type' each course type falls into. There are currently 3 PIC Types - Standard, EFR and DSD. Different types have different requirements for PIC Online - e.g. when uploading OW courses, a student image is required but when uploading DSDs it is not. The PIC Type informs EVE what information to check is in place before allowing a certification to be uploaded. And it informs EVE which Temporary Card layout to use when printing.</p>
PIC Card	Choose the default PIC Card that the student will receive when they're certified. Currently there are 2 card types available - Standard and EFR.
Calendar Colors	Choose your Calendar Colors for the Course Type. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this course type. E.g. you could show all Open Water courses in red and all Advanced courses in blue.
URL	<p>If you have a webpage with information about this course type, enter the appropriate URL. In the Calendar, you can export information to HTML so you can show the course timetable on your website. If you have specified a URL</p>

for the course type, EVE will automatically create a link in the HTML file to the course type's page so web users can see information about the course by clicking on a link.

Details

Tabs	When you create a new course or open an existing course that has this Course Type, the tabs shown on the Course form will be those that you have ticked in this section.
Show Course Dates	Put a tick in this box if you want to be able to define a Start and End date on courses of this type.
Show Swim Options	Put a tick in this box if you want swim options - i.e. Location and Term - to appear on courses of this type.
Learning Guide?	Check the checkbox if you have purchased the lesson guide that relates to the course type. This will make the course type visible in the Lesson Guides Module so you can launch the lesson guide from EVE (See Section 16.Lesson Guides).
Folder	Specify the default Folder where the lesson guide files are located. Each lesson guide gets installed into a different folder.

Stores

Check the Stores that have access to this course type - e.g. you may teach Rescue courses at store 1 but not at store 2. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only the active Store for this PC is selected.

Module Types

Course Module Types are the individual components of a course. For example, the modules of an Open Water course may be Induction, Knowledge Development 1, Knowledge Development 2, Confined Water 1, Confined Water 2, Open Water 1, Open Water 2, etc. These modules are the individual components of this course and will be used for scheduling when Creating a New Course (See Section 9.1.1.Creating a New Course).

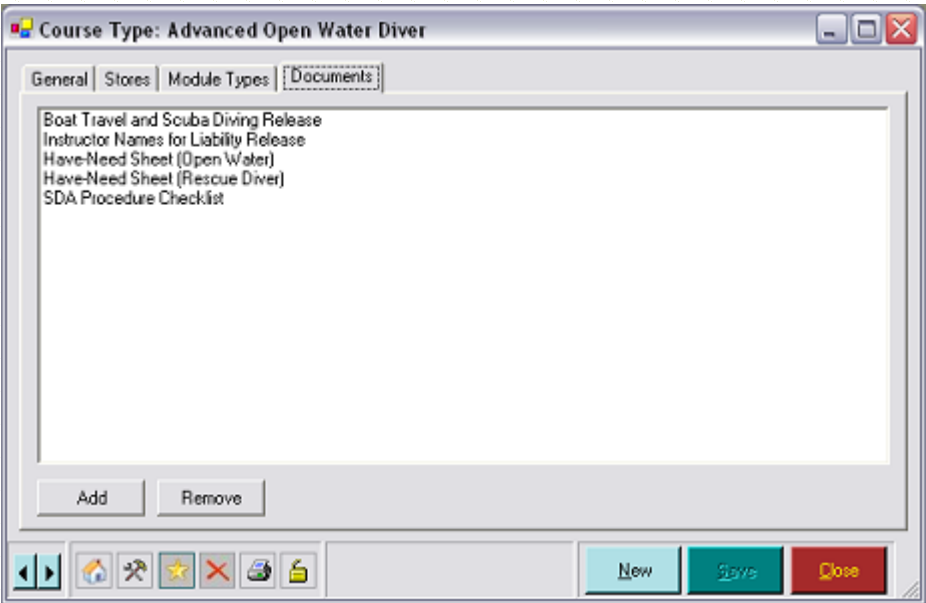
Module Type	Display Order	Kit Required?	Auto Add To New Co	Default Duration (mins)
Knowledge Development	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Night Dive	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Navigation	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Deep	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
PP8	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Search & Recovery	5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Wreck	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Boat	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Drift	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Naturalist	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Dry Suit	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Multi-Level	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Rebreather Dolphin Atlantis	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60
Ice	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>	60

Module Name	Enter a Description of the module.
Display Order	<p>Course modules usually take place in a set order, for example, Open Water Knowledge Development 1 occurs before Knowledge Development 2. Use the Display Order to set the order. Assign a unique number to each module in ascending order.</p> <p>The Display Order will be used to display modules when Creating a New Course (See Section 9.1.1.Creating a New Course).</p>
Equipment Required	Check the box if equipment is required for the course module (for example, equipment is probably not required for a Knowledge Development module, but is required for an Open Water module).
Auto Add To New Course	If the <i>Auto Add to New Course checkbox</i> is checked, the module will be automatically added to the assigned list when Creating a New Course (See Section 9.1.1.Creating a New Course).
Default Duration (Min)	Use the Default Duration (Mins) to set a module end time (equal to the module start time plus the duration) when Creating a New Course (See Section 9.1.1.Creating a New Course).
Default # of Days after Start Date	<p>If you enter a positive value into this box, the start date of the module will be defaulted to that number of days after the courses' Start Date when you're creating a New Course (See Section 9.1.1.Creating a New Course).</p> <p>Leave it blank if you don't want EVE to default the module date for you.</p>
Default Start Time	The Default Start Time will be defaulted in the module start time when Creating a New Course (See Section 9.1.1.Creating a New Course).
Default Location	The Default Location will be defaulted in the module location when Creating a New Course (See Section 9.1.1.Creating a New Course). Leave blank if the module does not take place at any fixed location.

Documents

Enter any Documents (See Section 4.4.14.Documents) which you want to print/email each time a customer enrolls in a course of this type. For instance, you could link an equipment-sizing sheet to the Open Water course

type. Later, when you are using the Courses Module to set up a new course (See Section 9.1.1.Creating a New Course) or are selling a place on a course, you can print copies of each document.

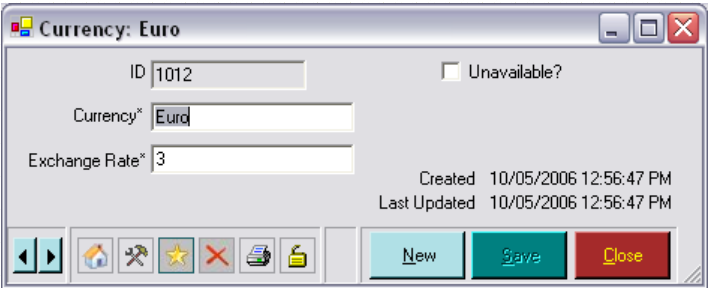


To add items from the allocated document list, click the **Add button** and select the document. To remove items, highlight the document and click the **Remove button**. Assigned documents may be viewed and printed from the Courses module when a course of this type is on display. The documents assigned may be in any document format you like - for example, Microsoft Word, PDF, JPEG, etc. You may include Release documents here or a document giving directions to the local dive site, etc.

4.4.9 Currencies

Enter the Currencies your organization uses for sales or purchasing. You will be able to convert Currencies using the Currency Calculator. Additionally, you can show the price in different currencies on receipts. Most locations will not need to create any new currencies since there is one Default currency built into EVE. When the Default currency is used, EVE will show the currency symbol on printed receipts and in EVE itself that is defined in the Regional Settings of your Windows Control Panel.

Only enter new currencies if your store deals with **multiple** currencies such as Francs and Euros.



Currency	Enter the name of the Currency.
Exchange Rate	Enter the current exchange rate

4.4.10 Customer Types

You will create Customer Types for each customer group that you want to search on, provide a regular discount to, or assign to a course or trip role, etc. For example, you may provide a standard discount on equipment purchases to your store staff or you may give club members a 5% discount on trips. Customer Types are used to identify discount eligibility in the Sales Module (See Section 6.1.1.Selling Stock Items) and to identify course

roles in the Courses Module (See Section 9.1.2.Adding Additional Course Data) and trip roles in the Trips Module (See Section 10.1.2.Adding Additional Trip Data or Section 10.2.2.Adding Additional Day Trip/Charter Data).

General

Customer Type: Club Member

General Discounts

ID 2

Customer Type Club Member

☒ Discountable?

☐ Employee?

☐ Course Role?

☐ Trip Role?

☐ Unavailable?

Invoice Text

PAYMENT TERMS : We accept payments made by Visa or Mastercard (a fee of 1% will be applied to Credit Card payments). 50% payable on

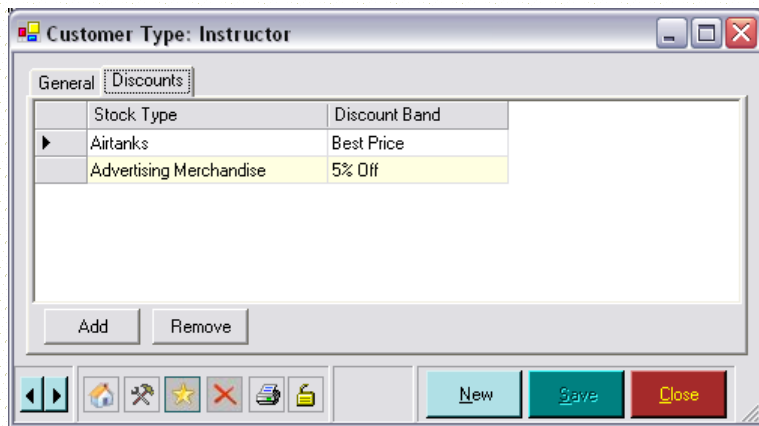
Created 7/16/2007 3:25:23 PM
Last Updated 2/26/2010 5:01:04 PM

New Save Close

Customer Type	The name of the Customer Type.
Allow Discounts?	Check this checkbox if this type of customer is eligible for regular discounts or special pricing. If this checkbox is checked, EVE will display the customer type on the Prices tab of the Stock Item form so you can e.g. type a special price for customers of that type when they buy the particular stock item.
Can be assigned to customers	If this checkbox is checked, EVE will display the customer type in the list at the bottom right of the Customer form so you can assign it to customers (e.g. you can mark the customer as being a club member).
Employee?	Check this box if this is a role potentially held by an Employee (See Section 4.4.15.Employees). When this box is selected, the Course Role and Trip Role options will be available.
Course Role?	Check this checkbox if this type of employee will have a role on courses.
Trip Role?	Check this checkbox if this type of employee will have a role on trips.
Invoice Text	Information in that box will be printed on receipts if the invoice's customer has that customer type. A text box must be visible on the Receipt print layout called 'CustTypeNotes'

4.4.11 Discounts

Discounts may be applied for different Customer Types. For example, you may choose to offer all club members a 5% discount on equipment purchases or you may sell PADI material to your instructional staff at member pricing but to your general customers at MSRP (See Section 6.1.1.Selling Stock Items). You can use this section to define discounts by stock type.



Stock Type

Add a Stock Type by clicking the **Add** button and checking the appropriate Stock Type(s) in the pop up list box.



You may select single or multiple stock types. Use the **Select All** button and **Deselect All** button to quickly select/deselect items.

Pick a Cost Center and a Discount Band from the pick list and click **Apply**.

To remove a Stock Type, highlight it in the customer type box and click the **Remove** button.

When an item of the Stock Type is added to the shopping basket in the Sales Module for a customer who is defined as being eligible for a discount for that Stock Type, EVE automatically applies the appropriate discount. You can override the discount if you wish.

Discount Band

Select the Discount Band to apply to the selected Stock Types.

This Discount Band will be used when Selling Stock Items (See Section 6.1.1. Selling Stock Items) to a customer of this type.

4.4.12 Denominations

At the start and end of the day, you may count the cash drawer and enter the information into the Till Reconciliation Report. To do this, you need to have defined the Denominations that are appropriate for your country (for example, in the US there are one, five, ten and twenty dollar bills. In the UK there are one pound coins and five and ten pound notes, etc). You need to enter a description and a value.

General

Denomination: # 100s

General Stores

ID 7

Description* # 100s ☐ Unavailable?

Value* 100

Display Order* 1

Created 01/01/2001 12:00:00 AM
Last Updated 08/01/2006 5:10:24 PM

New Save Close

Description	Enter the Description of the denomination.
Value	Enter the Value of the denomination.
Display Order	Enter the Display Order in which the denomination should display on the Till Reconciliation and other reports.

Stores

Check the Stores that have access to this denomination. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.13 Destinations

If you organize diving vacations, the Destinations you visit can be defined here. You will use Destinations to capture information about any destination to which you book day trips or charters (See Section 10.2.1.Creating a New Day Trip/Charter) or longer vacation trips (See Section 10.1.1.Creating a New Vacation Trip).

General

Destination: Aruba

General Stores Stock Items Documents

ID 3

Destination* Aruba

Prefix* Aru

Video <VideoDir>Holiday.avi

Min. Number* 5

Max Number* 15

☐ Unavailable?

Calendar Colors

Use this section to set the colors that will represent the Destination in the Calendar

Fore Color Back Color

URL

Created 22/04/2004 4:13:41 PM
Last Updated 04/02/2005 5:53:24 PM

New Save Close

Destination	Enter the name of the Destination.
Prefix	The Prefix is a quick reference code which you can use when Setting Trip Options (See Section 4.3.6.Trips Options) to auto generate a trip number.
Video	Enter the filename if you have Video footage of the vacation destination in compatible format (AVI or mpeg). You can play this to potential customers in the Trips and Sales modules.
Min Number	Enter the minimum number of customers that you require before you will book a trip to this destination. When creating trips/charters you may only want to go

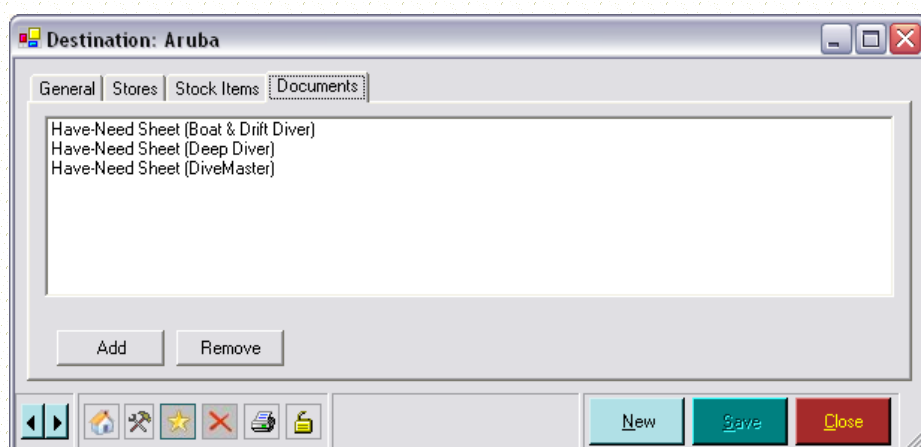
	ahead with a particular trip if the minimum number of passengers has been reached. The minimum number you set here will automatically default for any vacation trip using this destination (See Section 4.4.13.Destinations)
Max Number	The maximum number of places available on trips to this destination. This is used as the default when new vacation trips are added to the destination (See Section 4.4.13.Destinations) but you can override the figure for individual trips. EVE will prompt you if you try to exceed the maximum number of customers on a trip.
Calendar Colors	Choose your Calendar Colors for the Destination. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this destination. This is useful so you can quickly see in the Calendar, which trips/charters relate to which destination. E.g. all trips to Aruba could be displayed in red, while those to Cozumel could be displayed in blue.
URL	If you have a webpage with information about your destination, note the appropriate URL. In the Calendar, you can export information to HTML so you can show the trip timetable on your website. If you have specified a URL for the destination, EVE will automatically create a link in the HTML file to the destination's page so web users can see information about it by clicking on a link.

Stores

Check the Stores that have access to this destination. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

Documents

Enter any Documents that you want to print or email each time a customer reserves a place on a trip to this destination. For instance, you could link an orientation sheet and map to a specific location as well as release forms. Later, when you are using the Trips Module to sign up a customer to a trip, you can print copies of each document.



To add items from the allocated document list, click the **Add** button and select the document. To remove items, highlight the document and click the **Remove** button. Documents can be in any format you choose, for example, Microsoft Word, PDF, JPEG, etc

4.4.14 Documents

Documents can be identified in EVE and then linked to other records (for example, Course Types, Destinations or Stock Items, etc). Once linked, you can view or print Documents when you are working with those records. For instance, if you are setting up an Open Water course you could print copies of a standard disclaimer.

General

The screenshot shows a window titled "Document: Boat Travel and Scuba Diving Release". It has two tabs: "General" and "Links". The "General" tab is active. It contains the following fields and controls:

- ID: 1
- Description*: Boat Travel and Scuba Diving Release
- Filename*: <DocDir>Boat Travel and Scuba divi
- Created: 19/06/2001 08:24:13
- Last Updated: 19/06/2001 08:24:13
- Checkboxes: ☒ Show in EVE?, ☒ Show in EVE OnLine?, ☐ Mandatory in EVE OnLine?, ☐ Unavailable?
- Buttons: Open Document, New, Save, Close

Description	Enter a Description of the document
Filename	Enter the fully pathed Filename - i.e. filename and folder. It is advisable to store all documents in the standard EVE folder c:\Program Files\Integrated Scuba Systems\Program\Docs. If you do this, EVE will replace the full path with a template name, for example, <DocDir>Release.pdf. If you want to share documents between multiple PCs on your network, you can tell EVE on each PC where is the location of <DocDir>. For example, on one PC <DocDir> may be C:\Program Files\Integrated Scuba Systems\Program\Docs whilst on a different PC it may be H:\Program Files\Integrated Scuba Systems\Program\Docs. You can change the <DocDir> location by clicking Tools then EVE Folders (See Section 23.2.EVE Folders) on each PC.
Show in EVE?	Check this box if the document should be available in EVE
Show in EVE OnLine?	Check this box if the document should be available in EVE OnLine
Mandatory in EVE OnLine?	Check this box if the document should be mandatory in EVE OnLine. You may require the customer to read and agree to certain documents (e.g. waivers, etc) when signing up for a course or trip in EVE OnLine. These documents should be marked as 'Mandatory in EVE OnLine'.

Links

The screenshot shows the same window as above, but with the "Links" tab active. It displays a table of linked data elements:

Data Type	Description
Course Type	Advanced Open Water Diver
Destination	Cozumel
Course Type	Boat Diver
Stock Type	Instruction
Stock Item	Boat Diver

Below the table is an "Open..." button. The bottom of the window shows the same navigation and action buttons as the General tab.

Links shows the static data that you have linked this document to. For example, if you have linked a release document to the Advanced Open Water Diver course type, it will show here.

You make these links in the individual data elements - for example, on the Course Type form, Destination form, Boat form, Stock Item form, etc. To review the links, highlight a document and click the **Open** button.

4.4.15 Employees

When setting up EVE, one of your first tasks should be to create and define details of the employees at your store along with their passwords and user privileges for those people that are authorized to use EVE. You can create records for all employees here even if they will not use EVE - for example, instructors, divemasters, service technicians, etc. Since employees are likely to be customers as well, much of the information located in Employees is the same as that in the Customers Module (See Section 7. Customers). This section describes just enough for you to create users and set their access privileges.

General

First Name	Enter the employee's First Name
Middle Initial	Enter the employee's Middle Initial if there is one
Last Name	Enter the employee's Last Name
Customer Type	Put a check next to the 'Employee' item in the Customer Type list at the bottom right. This will make 3 items become active in the list at the bottom left - i.e. Employee, Teachable Course Types and Module Costs.

All other fields on this tab are described in the Customers Module. Described below are those details that are specific to employees (rather than regular customers).

Employee

User?	Put a check mark in the User? box if the employee is a User of EVE.
User ID	Enter a User ID for the individual. You may want to use the name of the employee or their initials.
Password	If you want to secure the program from unauthorized use, type a Password for the user. You will notice that the text you type is not shown. Instead, asterisks (*) appear in the field so that onlookers cannot learn the password. You may want to type a default password and then ask users to change this to their own password when they first use EVE. If you do not want to set a password, clear the asterisks.
UI	Some employees may prefer to use a different User Interface than others. E.g. you may want a temporary worker that only occasionally works as a sales clerk to use the Simple Data Entry user interface while more experienced staff to use the Advanced Data Entry user interface. You may prefer the Administrator user interface. Choose a UI here if you want that user interface to be used when the employee logs in. Leave the entry blank if you don't want the user interface to change when the employee logs in.
Instructor?	<p>Put a check mark in the Instructor? Box if the employee is an instructor. If the <i>Only Employees Allowed to Teach the Course Type can be Added</i> checkbox is checked in Setting Course Options (See Section 4.3.5.Courses Options), then all employees who have been identified as an instructor here will be displayed when Creating a New Course (See Section 9.1.1.Creating a New Course).</p> <p>You will only be able to add Teachable Course Types (on the next tab) to employees who have been identified as an instructor.</p>

Instructor #	If the employee is an instructor, enter their Instructor # here. This number will be used when processing On-Line PICs (See Section 9.2.4.PIC).
Technician?	Put a check mark in the Technician? Box if this employee is a technician. Only those employees who are identified as technicians will be assignable to work on service records (See Section 12.1.Service Booking).
Technician #	If you assign ID numbers to your technicians, enter it here.
Stores	Check the Stores at which this is a valid employee. The employee will only be able to log on at a store if they are marked as being valid at that store.
Calendar Colors	Choose your Calendar Colors for the employee. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this employee. E.g. items relating to Peter Smith in the calendar may appear in red, whilst those relating to Amanda Green may appear in blue.
Bio URL	If you keep a biography of your employees on the web, you can link to it here. In the Calendar, you can export information to HTML so you can show the course and trip timetable on your website. If you have specified a URL for the employee, EVE will automatically create a link in the HTML file to the employee's page so web users can see information about them by clicking on a link.
Commission Rate	<p>The commission that you pay to your staff members is calculated by one of the following formulas:</p> <ul style="list-style-type: none"> ❖ Net Price * Employee Commission Rate * Stock Item Commission Rate ❖ Net Profit * Employee Commission Rate * Stock Item Commission Rate <p>Values using both formulae are displayed in the commission report in the Sales Module - you choose which one to use.</p> <p>Each employee can be on a different commission rate. Enter the Employee commission rate here.</p>
Agent Commission Rate	On the Details page of the Customer form, there is an entry for the Account Manager. There you could choose e.g. a particular staff member that is responsible for the customer or the name of a Travel Agency if they were referred by that Agency. Later, you may want to calculate commission due to the Account Manager based on sales to their customers. The commission will be charged at the rate entered into the Agent Commission rate box.

Privileges

The bottom half of the form lists the security access the employee has to EVE. In this section you will identify what privileges the employee has and therefore, what data they can add, change or delete from EVE.

Put a checkmark against those privileges you want to assign and click **Save** (See Section 21.1.User Privileges).

You can quickly assign privileges to users by clicking the **Select All** button or **Deselect All** button. You can also duplicate privileges by using:

Copy Privs To Other User(s)	When you click this button, a list of EVE users is shown and you can put a check mark against those you want to copy the current set of privileges to. In this way, you can set up one user's privileges first and then copy them to all other users who need the same access level.
Copy Privs From User	When you click this button, EVE lets you pick an Employee that already has privileges defined so you can copy their privileges to the current employee.

Teachable Course Types

Use the Teachable Course Types form to identify which courses an employee is allowed to teach. A Customer Type must be selected on the General tab that is marked as being a Course Role (see section 4.4.10) for this page to be accessible.

If the *Only Employees Allowed to Teach the Course Type can be Added* checkbox is checked in Setting Course Options (See Section 4.3.5.Courses Options), only those employees authorized to teach this specific course on this form will be listed when Creating a New Course (See Section 9.1.1.Creating a New Course).

Employee: RICHARD MOON

Teachable Course Types

Put a check mark against each type of Course this Employee can teach

<input checked="" type="checkbox"/> Advanced Open Water Diver	<input type="checkbox"/> EFR: Prim. & Scnd. Care (CPR&FirstAid) with AED
<input checked="" type="checkbox"/> Adventure Diver	<input type="checkbox"/> EFR: Prim. and Scnd. Care (CPR & First Aid)
<input type="checkbox"/> Altitude Diver	<input type="checkbox"/> EFR: Primary Care (CPR) Only
<input type="checkbox"/> Atlantis/Dolphin Rebreather	<input type="checkbox"/> EFR: Primary Care (CPR) with AED
<input checked="" type="checkbox"/> Basic Scuba	<input type="checkbox"/> EFR: Secondary Care (First Aid) Only
<input type="checkbox"/> Bloodbourne Pathogens Awareness	<input type="checkbox"/> Emergency Oxygen Use
<input type="checkbox"/> Boat Diver	<input type="checkbox"/> Enriched Air Diver
<input type="checkbox"/> Bubble Maker	<input type="checkbox"/> Equipment Specialist
<input type="checkbox"/> Cavern Diver	<input type="checkbox"/> First aid in the work place, Australia
<input type="checkbox"/> Coral Reef Conservation	<input type="checkbox"/> First aid in the work place, Great Britain
<input type="checkbox"/> Deep Diver	<input type="checkbox"/> First aid in the work place, New Zealand
<input type="checkbox"/> Discover Enriched Air Nitrox	<input type="checkbox"/> Fish Identification
<input checked="" type="checkbox"/> Discover Scuba Diving	<input type="checkbox"/> Ice Diver
<input type="checkbox"/> Distinctive Specialty	<input type="checkbox"/> IDC
<input checked="" type="checkbox"/> DiveMaster	<input type="checkbox"/> IDC Staff Instructor
<input type="checkbox"/> DPV Diver	<input type="checkbox"/> Instructor
<input type="checkbox"/> Drift Diver	<input type="checkbox"/> Junior Advanced Open Water Diver
<input type="checkbox"/> Dry Suit Diver	<input type="checkbox"/> Junior Adventure Diver
<input type="checkbox"/> EFR: Care for Children	<input type="checkbox"/> Junior Master Scuba Diver
<input type="checkbox"/> EFR: Care for Children with AED	<input type="checkbox"/> Junior Openwater Diver
<input type="checkbox"/> EFR: CPR/AED/First Aid - Adult/Child/Infant	<input type="checkbox"/> Junior Rescue Diver
<input type="checkbox"/> EFR: CPR/First Aid - Adult/Child/Infant	<input type="checkbox"/> Junior Scuba Diver
<input type="checkbox"/> EFR: First aid in the work place, CPR/FA	<input type="checkbox"/> Junior Scuba Diver (JSCB)
<input type="checkbox"/> EFR: First aid in the work place, CPR/FA/AED	<input type="checkbox"/> Master Scuba Diver
<input type="checkbox"/> EFR: First aid in the work place, CPR/FA/CFC	<input type="checkbox"/> Master Scuba Diver Trainer
<input type="checkbox"/> EFR: First aid in the work place, CPR/FA/CFC/AED	<input type="checkbox"/> MFA Instructor

Select All Deselect All Copy to other Employee(s)

New Save Close

You can quickly define and copy this information to another instructor using the **Select All**, **Deselect All** and **Copy to Other Employee(s)** buttons.

Module Costs

You can configure EVE to calculate the amount you pay each instructor for teaching a module on a course. Before doing this you need to enter data into this section to define how those amounts will be calculated. For each module type and instructor you can define two figures:

- ❖ **Base Cost (Pre Tax):** the amount the instructor will get just for teaching the module.
- ❖ **Additional Cost per Customer:** an additional amount the instructor will get for each customer that attends the module

If you just pay instructors for running course modules (irrespective of how many customers attend) enter a positive figure for the Base Cost and zero for the Additional Cost Per Customer. Alternatively, if you pay instructors based solely on the number of customers attending, enter zero for the Base Cost and a positive figure for the Additional Cost Per Customer. Enter a positive figure for both values if you do a bit of both.

The specific module rates you define here will be defaulted when Creating a New Course (See Section 9.1.1.Creating a New Course).

Employee: RICHARD MOON

Module Costs
Use this section to indicate how much the Employee will be paid for each type of Course Module

Course Type
Advanced Open Water Diver

Modules

Module	Base Cost (Pre Tax)	Ad
Knowledge Development	\$15.00	\$2.00
Night Dive	\$20.00	\$2.00
Navigation	\$20.00	\$2.00
Deep	\$20.00	\$2.00
PPB	\$20.00	\$2.00
Search & Recovery	\$20.00	\$2.00
Wreck	\$20.00	\$2.00
Boat	\$20.00	\$2.00
Drift	\$20.00	\$2.00
Naturalist	\$20.00	\$2.00
Dry Suit	\$25.00	\$2.00
Multi-Level	\$20.00	\$2.00
Rebreather Dolphin Atlantis	\$20.00	\$2.00
Ice	\$20.00	\$2.00
U/W Photographer	\$20.00	\$2.00
Altitude	\$20.00	\$2.00
AWARE - Fish ID	\$20.00	\$2.00
DPV	\$20.00	\$2.00
U/W Videographer	\$20.00	\$2.00
Rebreather Ray	\$20.00	\$2.00

Copy to other Employee(s)

New Save Close

Module	Pick this from the pop up list box that appears when you click on the grid column. The list only holds Modules applicable to the course type selected
Base Cost (Pre Tax)	Enter the amount (pre tax) you will pay the instructor for teaching the module.
Additional Cost Per Student	Enter the additional amount you will pay the instructor for each customer that attends the module.

Once you have defined values for the first instructor, you can copy those values to other instructors if you pay them the same amount. To do this, click on the **Copy to Other Employee(s)** button.

A list of instructors is shown. Put a checkmark against those to whom you want to copy the costs and click **OK**. All costs are copied, not just those for the course type selected. If one of the destination instructors already has values set, these are overwritten with the new values.

4.4.16 Equipment Items

Use this section to enter details of each rental Equipment Item. You will use equipment in the Rental Module. You can also enter details of customer equipment here, although you will usually do that in the Servicing module.

If the Owner is identified as *.Rental Equipment.*, the item will be made available for rent in the Rentals module. All items are serviceable (i.e. available to be added to a Service Booking) regardless of whether the Owner is *.Rental Equipment.* or a customer.

General

Stock Type	Choose the Stock Type of the piece of equipment from the pop up list box - e.g. BCD, Regulator, etc. If the Owner is .Rental Equipment., only types marked as <i>For Rent</i> in Stock Types are shown in the list (See Section 5.1.6.Stock Types). If the Owner is a customer, only types marked as <i>For Service</i> in Stock Types are shown in the list. Sometimes there will be occasions when you want to create a serviceable item for a type that is not usually serviceable - e.g. a customer may bring in a snorkel with a broken mouthpiece. In cases like this, put a checkmark in the box just above the Stock Type button before clicking the Stock Type button. In this case, all Stock Types will be shown - not just those that are marked For Service.
Manufacturer	Choose the Manufacturer of the equipment item from the pop up list box.
Description	You will probably want to give a description for some items of rental equipment (for example, a particular computer, or regulator, etc.) while not others (for example, snorkels, weights, etc.). Enter text to identify the item, if appropriate.
Ref #	If the item has a unique Reference Number you can enter the number here. You may find the most efficient way to create rental bookings is to assign a unique reference number to each item. E.g. BCDs may be numbered BC1, BC2, BC3, etc. Regulators may be numbered R1, R2, R3, etc. You can attach the reference number to each item and then quickly type the appropriate number when creating the rental booking to assign it to the booking.
Bar Code #	If the item has a Barcode Number you can quickly book it out in the equipment module. Enter the barcode number here.
Serial #	Enter the item's Serial Number, if applicable
Primary Color	If applicable, choose the Primary Color from the pop up list box.
Secondary Color	If applicable, choose the Secondary Color from the pop up list box.
Size	If applicable, choose the Size from the pop up list box. Only sizes appropriate to the stock type identified above will be listed. Where possible you should enter the size since you can set up a rental profile for regular customers and quickly show items that match their profile based on the size.

Owner	If you create a new Equipment Item in the Servicing module, the Owner will be defaulted to the name of the customer on the Service Booking. If you create a new Equipment Item elsewhere, the Owner will be defaulted to <i>.Rental Equipment</i> .
Date Manufactured	If applicable, enter the date the equipment item was manufactured.
Date Purchased	If applicable, enter the date the equipment item was purchased by the store.
Date Sold	When you sell Rental Equipment, you can enter the date the equipment was sold.
Next Service	The date the equipment item next needs to be serviced. If you perform a service on an item, when the work is completed, the Next Service date will be set automatically based on the service period you set in Stock Types (See Section 5.1.6.Stock Types).
Net Worth	The resale value (before tax) of the item.
Bypass Double Booking Check?	<p>Use the Bypass Double Booking Check to identify whether or not you want EVE to examine this item's booked status when determining if it is available for rent in the Rental Module (See Section 11.1.1.Adding Gear to the Dive Bag). This is particularly useful if your dive centre books generic equipment for a customer and does not worry about the specific piece booked until the customer picks it up.</p> <p>For example, when a customer calls up to make a rental booking, you may want EVE to check specific availability of wetsuits by size on the dates the customer is making the booking. You would leave this checkbox, unchecked. However, for the weight belt, you may want to bypass the double booking check as you can book any weight belt for the customer and then build a customer belt when they show up. In this case, you would check the Bypass Double Booking Check for weights.</p>

You can click the Options button at the bottom left of the form and then **Create Stock item** to quickly create a stock item for a piece of rental gear that is for sale. This is useful, for example, if you regularly sell off your rental gear in order to make way for new makes and models (See Section 6.1.7.Selling Rental Equipment). You will create a stock item using the steps described in Stock Items. EVE will automatically use the Stock Type you defined when Setting Rental Options (See Section 4.3.7.Rentals Options).

You can click the **Send to New Service Booking** button to create a new work order and automatically add the item to it.

Stores

Check the Stores at which this item of equipment can be booked. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

History

	Booking Type	Booking #	Due Start Date	Due End Date	Actual Start Date	Actual End Date
▶	Service	8518	12/01/2006	13/01/2006		
	Service	8519	16/01/2006	17/01/2006		

☒ Rental Bookings ☒ Service Bookings Rental Count: 0. Service Count: 2.

This page will automatically populate over time as the piece of equipment is rented to customers or booked for service. You can view either rental equipment or customer equipment history.

Package Items

If certain Equipment Items are always booked together, you can group them together into a package. You can choose whether, when the package is added to the rental booking in the Rentals Module,

- 1/ the package is expanded and the constituent parts are added to the rental booking as well, or
- 2/ just the main item is added to the booking

Some rental items act as a Package. You may want to consider all parts as one rental item but service each item individually. Alternatively, you may want to have an item called e.g. 'Full Kit' and include in it Mask, Fins, Snorkel, BCD, etc. When you book Full Kit, each individual item will be booked as well. Use this section to indicate which items comprise the rental item package

Stock Type	Ref #	Serial #	Manufacturer	Description	Primary Color	Secondday I
Masks	16436560000		Oceanic	Avalon	Black (BK)	
Fins - Adjustable			Mares	Yolo Power		
Snorkel Kit	16438120000		Oceanic	Response	Citrus	

☒ Equipment Item is a Package? ☐ Add Package Items to new Rental Bookings? Add Remove

Equipment Item is a Package

If you have checked the *Equipment Item is a Package?* Checkbox, you will be able to click the **Add** button or **Remove** button to package items together.

Add Package Items to new Rental Bookings

If the box is checked, all the constituent part of the package will be added to rental bookings when the main item is added. This is useful when you're wanting to rent e.g. Wet Suit, Cylinder, Regulator, BCD, Mask, Fins, Snorkel - all together. If the box is unchecked, none of the constituent parts of the package will be added to the booking. This is useful for e.g. a Regulator + Octopus + Gauge combination. You may want to service each item individually but rent it as one item.

Rental Prices

Use this to set Rental Prices for the individual piece of rental equipment. You can also set Rental Prices in Stock Types (See Section 5.1.6. Stock Types), and that is more effective if all of one type of equipment is rented at the same rate. For example, if you rent all BCDs for \$15 per day - set the Rental Prices at the Stock Type level. However, if you rent BCD#1 for \$15 per day and BCD#2 for \$12 per day, you would set the Rental Prices here at the equipment level. If a price is set both for the BCD's stock type and for an individual BCD, the individual rate will override the stock type rate.

Equipment Item: Masks: M997 (.Rental. .Equipment.)

General Stores History Package Items Rental Prices

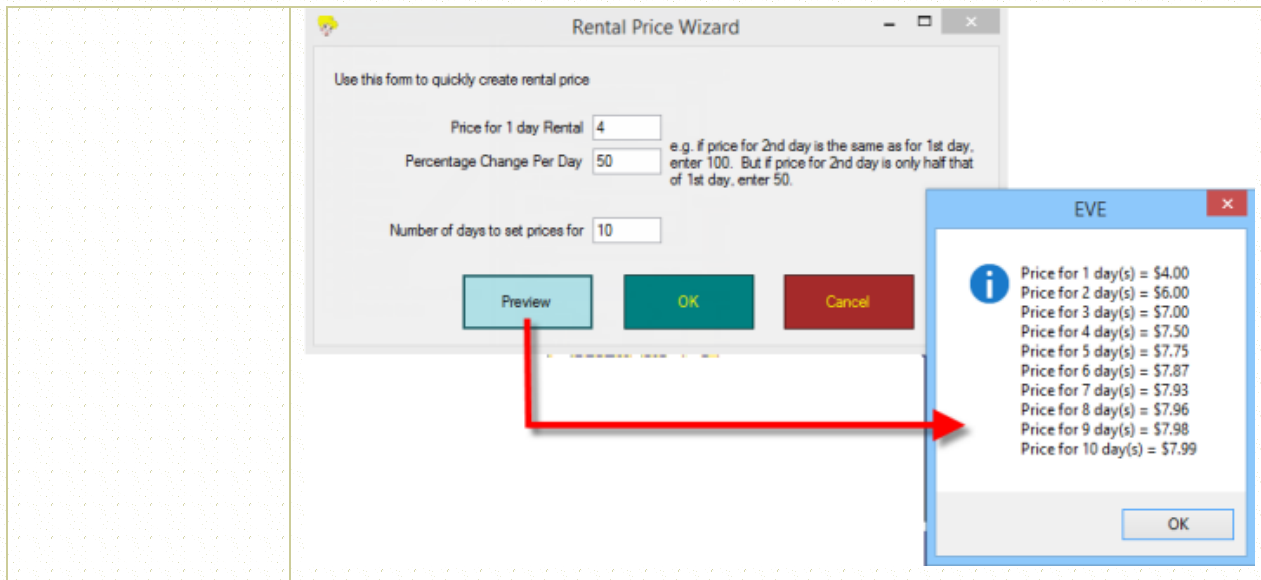
Use this page to set the Rental Prices for this individual item of equipment. If all items of a particular type are rented at the same price (e.g. all BCDs or all Regulators, etc), you should [set the Rental Prices on the Stock Type form](#) instead.

Days	Price	Late Return Penalty Price
1	\$5.00	\$1.00
2	\$10.00	\$2.00
3	\$12.00	\$3.00
7	\$15.00	\$5.00
*		

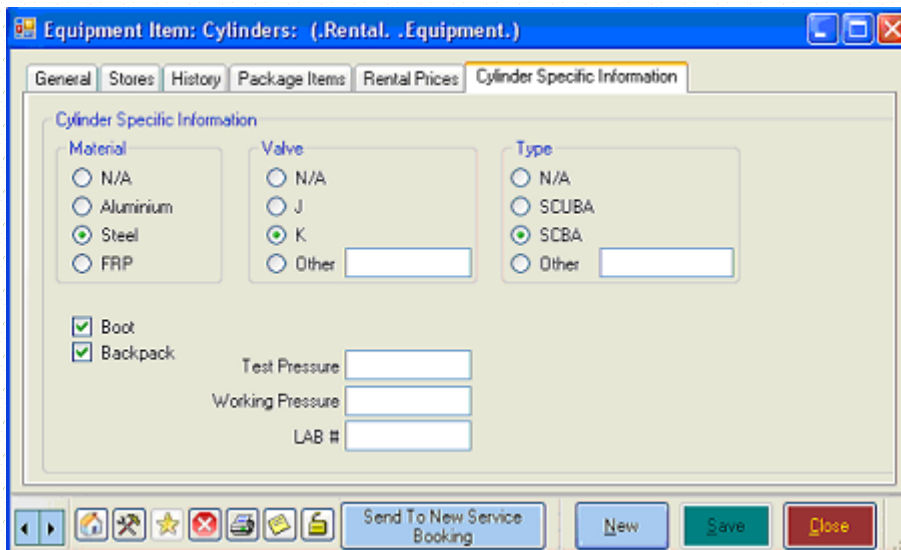
Rental Price Wizard

Send To New Service Booking New Save Close

Days	Enter the period of time in Days that the rental price covers.
Price	Enter the price for the number of days indicated above.
Late Return Penalty	If you want to charge a Late Return Penalty for those rentals that extend past the rental period, enter the penalty here. Rentals that are returned within the <i>Grace Period</i> you identified when Setting Rental Options (See Section 4.3.7. Rentals Options), will have the Late Return Penalty forgiven.
Rental Price Wizard	Click this to show the form below. It lets you quickly create rental prices to fill the grid above provided you base your prices on a simple sliding scale. In the example below it will generate a price of \$4 for a rental lasting one day and then apply a 50% discount for each following day. i.e. price for 2 days is: $4 + 4 \times 50 / 10 = \$6$, etc.



If the item of equipment is a Cylinder (or more specifically - if the item's Stock Type has a tick in the 'Show Cylinder Info' box), another tab will be visible called 'Cylinder Specific Information'



Here, you can enter information that relates specifically to cylinders. All entries are optional.

4.4.17 Enquiry Sources

Define the means by which new customers can learn of your store. This may be, for example, by looking in the yellow pages or seeing an advert in the local paper. In the Customers Module (See Section 7.1-New Customer) you can indicate the source of a customer's interest and then perform searches to see which source generates most interest. EVE comes pre-installed with several records.

If you find that more people are becoming your customers as a result of an advert you ran in the local paper than as a result of the yellow pages entry, you may want to consider paying for a larger entry in yellow pages.

General

Enquiry Source	Description of the Enquiry Source
-----------------------	-----------------------------------

Stores

Check the Stores that have access to this enquiry source. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.18 Enrolment States

Customers will enroll in both courses (See Section 9.2.1.Enrolling Customers) and trips (See Section 10.4.Customer Registration). You can set the Enrollment States for each customer on each course or trip. EVE come pre-configured with several alternatives, e.g. Enrolled, Provisional, Waiting List, etc.

General

Enrolment Status	Enter the description of the Enrollment Status.
Applies To Courses?	If you want to use this Enrollment Status for course enrolments, check the <i>Applies To Courses</i> checkbox.
Applies To Trips?	If you want to use this Enrollment Status for trip enrolments, check the <i>Applies To Trips</i> checkbox.
Counts Towards Places Taken?	For both courses and trips, you can set the maximum number of places you wish to sell. If customers who have this Enrolment Status will Count Towards the Places Taken, then check this checkbox. For example, customers that have a status of Enrolled should count towards the number of places taken, whilst those that have a status of Provisional perhaps should not.

4.4.19 Follow-Up Actions

Follow Up actions are used in managing contact calls to your customers (See Section 7.2.13.Scheduling Contact Calls).

General

Follow-Up Action: Send Info

ID1

Follow-Up Action*Send Info

☐ Unavailable?

Created01/11/2004 3:53:50 PM

Last Updated01/11/2004 3:53:50 PM

New

Save

Close

Follow Up Action	Enter any Follow-Up Actions you will assign to employees or customers. These actions are used in pop up notes to employees reminding them to contact customers.
------------------	---

4.4.20 Hotels

If you run a resort, you can enter details of your hotel or of hotels in your area where your customers can stay. You will use Hotels when booking rooms (See Section 13.1.1.Creating a New Resort Reservation).

General

Hotel: Hilton

GeneralRoomsStores

ID1

☐ Required?☐ Unavailable?

Hotel Name*Hilton

Address

Line 1

Line 2

Line 3

Line 4

Postcode

Country

Contact Details

Telephone #1

Telephone #2

Fax

Email

Web

Region

Default Times

Check-In

Check-Out

Calendar Colors

Use this section to set the colors that will represent the Hotel in the Calendar

Fore Color

Back Color

Rates

Single Rooms: \$60 per night

Twin \$100 per night

Created 3/12/2014 11:35:50 AM

Last Updated 3/12/2014 11:35:50 AM

Room Availability

New

Save

Close

Hotel	Enter the name of the Hotel.
Line 1	Enter the address of the hotel
Line 2	
Line 3	
Line 4	

Postcode	
Country	
Default Times: Check In/Check Out	If you run a hotel at your resort, you can set the usual Check In time and Check Out time. New resort reservations will use these times by default.
Telephone #1	Enter the Contact Details for the hotel.
Telephone #2	
Fax	
Email	
Web	
Region	If you have not checked the 'Use Classic Style Pickups' box on the Trips tab of the Options form (see section 4.3.6) - i.e. you're using EVE's method of tracking people that need to be picked up that is not linked to individual trips - then you can indicate which Region (or Route) the Hotel is on. E.g. if the Hilton, Radisson and Marriot are close together, they could be in Route 1 and serviced by one bus and the Best Western and Holiday Inn could be in Route 2 and serviced by a different bus. Choose the Region (or create new Regions) by clicking this button.
Rates	Enter information of the nightly Rates (costs) for rooms at the hotel.
Calendar Colors	Choose your Calendar Colors for the data element. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this data element.

Rooms

Hotel: Hilton

General Rooms Stores

☒ Pre-defined Rooms?

	Room #	Room Type	Unavailable?	Creation Date	Last Updated
▶	1	Double	<input type="checkbox"/>	9/5/2005 2:46 PM	9/5/2005 2:46 PM
	2	Single	<input type="checkbox"/>	9/5/2005 3:00 PM	9/5/2005 3:00 PM
	3	Single	<input type="checkbox"/>	5/30/2006 3:06 PM	5/30/2006 3:06 PM
	4	Single	<input type="checkbox"/>	5/30/2006 3:06 PM	5/30/2006 3:06 PM
	5	Double	<input type="checkbox"/>	5/30/2006 3:06 PM	5/30/2006 3:06 PM
	6	Single	<input type="checkbox"/>	5/30/2006 3:06 PM	5/30/2006 3:06 PM
*					

Room Availability New Save Close

Predefined Rooms	<p>If you book customers into specific rooms at the hotel, check the <i>Pre-defined Rooms?</i> checkbox. If you want to use EVE's Resort Reservation feature (See Section 13.1.1.Creating a New Resort Reservation), you will need to put a check mark in this box.</p> <p>However, if the record just represents a hotel in the local area you probably do not need to keep track of individual rooms so you should leave the box unchecked.</p>
Room #	Enter the Room # of the pre-defined room.

Room Type	Enter the Room Type, for example, single, double, twin or other.
-----------	--

Stores

Check the Stores that have access to this hotel. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only the active Store for this PC is selected.

4.4.21 Invoice Types

Invoice types are used in the Sales Module (See Section 6.1.1.Selling Stock Items). EVE comes pre-configured with several invoice types, described below.

Invoice Type

EVE comes pre-configured with six standard Invoice Types:

- ❖ Bank Deposits are used when money is taken out of the cash drawer to deposit at the bank allowing for accurate tracking of cash amounts in your drawer(s).
- ❖ Expenses are used when money is taken out of the cash drawer as petty cash to purchase supply items for the store or when you “sell” inventory to the store for internal use on a course or a trip. You can associate expenses with a course or a trip and automatically create an expenses invoice.
- ❖ Invoices are used to sell an item to a customer where payment is required at some future date. For example, you may use an invoice when you sell an item to a commercial vendor, where payment is due in 30 days. Or alternatively, if you have a mail order business where invoices are sent with the product for payment on receipt, an invoice can be used. No payments can be added to an Invoice. Instead, when the customer sends payment, the invoice should be opened and converted to a Sales Receipt so payment line(s) can be added. By default, Invoices are not exported

QuickBooks	should be exported by putting a tick in the box or not.
Update Stock Levels	You will want to have a tick in this box for Sales Receipts so inventory levels are adjusted when you sell goods. It is up to you though whether to have a tick in the box for LayAways etc. If not, stock levels will be decremented when the LayAway is converted to a Sales Receipt when you take the final payment.
Locked on Load	Some types of invoice should be locked (i.e. not editable) when they are opened to avoid accidental altering of data. E.g. Sales Receipts should be locked, by default. Privileged users can unlock these records if changes are necessary. You may want certain types of invoice to be unlocked when they are opened. For instance, Ongoing Invoices are unlocked by default since you will often want to make changes.
Invoice Must Balance	This value is for information only and indicates whether invoices of this type must balance before they can be saved - i.e. the amount tendered must balance the value of goods in the shopping basket. E.g. Sales Receipts have a tick in this box but LayAways do not since it is usual that you will take payments in installments over a period of days or weeks.
Show 'Convert to Sales Receipt' prompt	If there is a tick in this box, when you take final payment on an invoice with this Invoice Type (i.e. when the total of the payments equals the value of goods in the shopping basket), EVE will show a prompt asking if you want to convert the invoice to a Sales Receipt (recommended).
Update Reporting Dates when Converted to Sales Receipt	Every time you add an item to the shopping basket or payment grid on an Invoice, the item is saved with the date/time. That is the date/time that is used for reporting purposes. E.g. if you add items to an invoice on successive days, the items will appear in the sales reports on the days they were added. If you would prefer for e.g. Ongoing Invoice and LayAway sales to appear in sales reports only when the final payment is taken, put a tick in the 'Update Reporting Dates when converted to Sales Receipt' box.
Assign Loyalty Credit	If there is a tick in this box, Loyalty Credit will be assigned to the customer when Invoices of this type are saved provided, of course, the customer is a member of the loyalty program.
Show Change/Outstanding on Printed Receipt	If there is a tick in this box and the customer has paid an amount that is different than the value of goods on the Invoice (e.g. they have bought \$90 of goods and paid \$100 cash), the difference in amount (\$10 in this example) will be shown on the printed receipt.
Change/Outstanding Amount Text	You may want to show different text on the printed receipt when the customer has paid an amount other than the invoice total depending on the invoice type. E.g. On Sales Receipts, you may want the text to say "Change", whilst on Ongoing Invoices you may want the text to say "Outstanding Amount".
Invoice Type to use when Refunded	By default, when you issue a refund, the Invoice Type on the refund is "Sales Receipt". EVE does this so you can sell other items on the same transaction. However, you can choose a different Invoice Type if you prefer. E.g. you could set this value to an Invoice Type called "Refund".
Invoice Tabs	On the Invoice form there are 4 tabs (only 3 show at one time): Shopping Basket, Unpaid Invoices, Paid Invoices, Payments. Use the check boxes in the Invoice Tabs section to indicate which tabs are active for the invoice type on new (unsaved) invoices of that type and on saved invoices of that type.

At this time, you can currently only edit existing Invoice Types. You cannot create new ones.

4.4.22 Languages

Languages are used to identify the first language for a customer (See Section 7.1.New Customer) and the language in which a course will be taught (See Section 9.1.2.Adding Additional Course Data). Languages are also used by EVE to allow you to switch between the languages that EVE can be displayed in (at time of writing English, Spanish and Italian).

Language	Enter the name of the Language you will use to teach courses or that your customers may speak.
Culture	Do not change this value. It is used by EVE when you switch the display language.

4.4.23 Locations

Each course module will occur at a specified location (for example, lecture hall one, pebble beach, etc.) You will assign locations to courses in the Courses Module (See Section 9.1.2.Adding Additional Course Data). Enter the location names here. Do not confuse Locations with Destinations which are places to which vacations are organized.

General

Location	Name of the location.
Address	Address of the location if applicable
Calendar Colors	Choose your Calendar Colors for the Location. These colors will be used in the Calendar (See Section 15.Calendar) for any bookings or activities associated with this location. For example, you could configure the calendar so all events happening in Classroom 1 appear in red, while those happening in

	Classroom 2 appear in blue.
Double Booking Count	This is for future use. Currently you should enter the number 1.
URL	<p>If you have a webpage with information about your location, enter the appropriate URL.</p> <p>In the Calendar, you can export information to HTML so you can show the course timetable on your website. If you have specified a URL for the location, EVE will automatically create a link in the HTML file to the location's page so web users can see information about it by clicking on a link.</p>

Stores

Check the Stores that have access to this location. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.24 Mailing Lists

If you send regular newsletters or information packs to people, you may want to record which people will receive which mail outs (See Section 7.1.New Customer). Define your different mailing lists here. You can add people to mailing list(s) by putting a tick in the appropriate box(es) on the General tab of the Customer form.

General

Mailing-List Name	Name of the mailing list (for example, Student Newsletter, etc.)
Show in EVE OnLine	If you use the companion product to EVE, called EVE OnLine (EVE OnLine lets you sell your products, courses and trips on-line) you can make the Mailing List available to EVE OnLine by putting a tick in this box. This will make the Mailing List show up on the Contact Information page in EVE OnLine so the user can indicate they want to be on your mailing list to receive emails from you.

Stores

Check the Stores that have access to this mailing list. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.25 PADI Territories

You should never have to edit the data in this section. It lists the existing PADI Territories. PADI Territories are used in processing On-Line PICs (See Section 9.2.4.PIC).

PADI Territory: PADI Americas

ID

PADI Territory*

Short Code* Contact

Address

Line 1
 Line 2
 Line 3
 Line 4
 Postcode
 Country

Contact Details

Telephone
 Fax
 Email
 Web

URLs

PTN

☐ Unavailable?
☒ Required?

Created 5/22/2004 5:20:32 PM
 Last Updated 6/20/2005 3:48:10 PM

Territory	Name of the PADI Territory
Short Code	Shortened identifier for the territory. This code is used when processing On-Line PICs.
Contact	Name of the Contact person
Address Line 1	The Address details for the PADI head office.
Address Line 2	
Address Line 3	
State/Address Line 4	
Post Code	
Country	The Contact Details for the PADI office.
Telephone	
Fax	
Email	
Web	Identifies the web site address of the PADI Travel Network in the territory
PTN URL	

4.4.26 Payment Methods

Define the Payment Methods that you accept in your shop when selling goods and services (See Section 6.1.1.Selling Stock Items). EVE comes pre-installed with common Payment Methods.

General

Payment Method	Enter the name of the Payment Method.
Credit/Debit Card	<p>Indicate whether the payment method is a credit or debit card. The options below will only become available when this item is checked.</p> <p>When creating a new credit card for a customer in the Customers module, or when choosing a credit card in the Sales module, only payment methods that have this box checked will be listed.</p>
Show Card Details Prompt	Check this checkbox if the credit / debit card prompt should be shown when this payment method is used in the Sales module.
Allow Credit Card Transmission	If you are using automatic credit card processing with EVE, you need to put a check mark in this box to make the Credit Card button appear on the Card form when payment is taken in the Sales Module.
Invoice Text	Enter any Invoice Text you wish to be printed on the invoice each time this payment method is used. For example you may wish to remind customers that all accounts are due 30 days after purchase when the On Account payment method is used.
Account	If you export data to QuickBooks, you need to inform EVE which QuickBooks accounts will accept data from which payment methods. Choose an account from the list of accounts you defined in QuickBooks accounts - section 4.4.28.
Graphic	If you want a Graphic (e.g. the MasterCard logo) to display next to the payment method in the Invoice Cool Bar, enter the filename associated with the Graphic here.
Additional Print Copies	Some Payment Methods may require extra receipt copies to be printed. For instance, when printing invoices paid with cash, one receipt may suffice. But when printing invoices paid with a credit card, you may want to print an extra

	copy; i.e. one for the customer to keep and a store copy that the customer signs. You can indicate here the number of copies in addition to the default value set for the 'Receipt' Print Layout that should be printed. In the example above, you would enter 0 for the value on the Cash payment method, and 1 for the value on the Visa payment method.
Customer Required?	Check this checkbox if a customer must be selected by the employee making the sale before the payment method can be used. This can be overridden for specific employees when setting user privileges.
Customer ID Required?	Check this checkbox if a customer must supply some sort of ID (for example, a driver's license, social security number, etc) before the payment method can be used.
Authorization Required?	Check this checkbox if an authorized staff member must validate the use of the payment method in the Sales Module. Authorizations are granted when setting user privileges.
Check # Prompt	Check this checkbox if the Check # Prompt should be shown when this payment method is used.
Check # Mandatory	Check this checkbox if a Check # is Mandatory before allowing this payment method.
Gift Certificate Prompt	Check this checkbox if the Gift Certificate Prompt should be shown when this payment method is used so a list of the customer's existing Gift Certificates is shown and the sales clerk can choose one.
Gift Card Prompt	Check this checkbox if the Gift Card Prompt should be shown when this payment method is used so a list of the customer's existing Gift Cards is shown and the sales clerk can choose one.
Voucher Prompt	Check this checkbox if the Voucher Prompt should be shown when this payment method is used so a list of the customer's existing Vouchers is shown and one can be chosen. Note Vouchers are no longer supported in EVE so this option is only present for backward compatibility with previous versions of EVE.
Account Prompt	Check this checkbox if the Account Prompt should be shown when this payment method is used so a list of the customer's existing Accounts Receivable accounts is shown and one can be chosen (or a new one created).
Open Cash Drawer	Check this checkbox if the cash drawer should open automatically when this payment method is used. The cash drawer will open only when the transaction has been saved.
Card Required On File?	Check this checkbox if a credit card number must be kept on the customer file to accept this payment method. For example, you might want to insist a credit card number is held on file before accepting payments On Account.
Quick Pay?	Only one payment method (if any) should have a tick in this box. If one payment method has a tick, a button called "Quick Pay" will be shown at the bottom of the Invoice form. When clicked, the associated payment method will be assigned to the invoice and EVE will automatically take payment equal to the invoice total. E.g. if most of your customers pay by credit card and you use one of EVE's supported credit card transmission utilities you could tick the Quick Pay box on a payment method called Credit Card. Leave the "Show Card Details Prompt" box unticked. Then, on the Invoice form, you can click the Quick Pay button and EVE will run the credit card transaction with no more prompts (other than the prompt asking to you swipe the card). For those odd occasions when the customer wants to split payment between 2 credit cards, you can still do

that using the standard payment method options on the Invoice toolbar.

Stores

Check the Stores that have access to this Payment Method. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.27 PCs

This section lists all computers that are used to run EVE. You will not usually need to add new PC records since EVE will automatically create them for you when new PCs are used with EVE for the first time. However, you may want to change the options for an existing PC. EVE writes to each invoice record the name of the PC where it was created so you can run reports to see which PCs are the most profitable or to lookup where an invoice was created if there is a query about it.

PC: ACME-SHOP

PC Information

ID 2060

PC Name* ACME-SHOP

Alias

Store* ACME Diving

User Interface Advanced Data Entry

Default Store View [Compound Store]

Station No.

☒ Cash Drawer Attached? ☐ Unavailable?

Created 7/16/2007 3:25:22 PM
Last Updated 8/5/2008 5:24:33 PM

Set Default Cash Float

New Save Close

PC Name	This uniquely identifies the PC. Each PC on a network has a unique name. Every PC has a name even if it has never been used on a network. You can see the name of your PC by right clicking on My Computer and clicking Properties and then clicking on the Computer Name tab.
Alias	As described above, the PC Name is used by Windows and is used to identify the computer on the network. In some cases, you may want to show a different, 'friendly' name for the PC - e.g. on reports. For example, rather than "Dell-Desktop" showing on the report you may want it to show instead "Main Point of Sale". To do that, enter the friendly name for the computer in the Alias box and then use a TextBox called "PC.Alias" on the Print Layout.
Store	Choose the Store the PC is in. In a multi-store environment, EVE needs to know which store the PC is in so it can keep track of which sales, customers, etc are linked to which store.
User Interface	You can change the look and feel of EVE. At the top right of the main form is a pick list that shows a number of pre-defined "User Interface Configurations" (Touch Advanced, Administrator, Advanced Data Entry, etc.). If you pick one, EVE will change its appearance to show different options. You might want different PCs to have different options by default - for instance a PC on the store's front counter might be configured to show the Simple Data Entry interface (which has fewer options and is the most simple to use), while the computer in the back office might be configured to show the Administrator interface (which shows all options). If you choose a User Interface here, the PC

	will start up showing that interface.
Default Store View	EVE supports different ‘Store Views’ - i.e. Compound Store, Default Store and This Store Only - that determine which information is visible based on which store it was entered at. Choose which Store View the PC should use. The default is Compound Store which means all data can be viewed regardless of where it was entered.
Station No.	If, for legal reasons in your location, you need to identify on reports each PC using a unique number you can enter that number in the Station No. box and then add a TextBox to your Print Layout called “PC.StationNo”
Cash Drawer Attached?	Put a check mark in this box if the PC has a cash drawer attached to it. If you do this, EVE will include the PC in the list of PCs that are shown in the Start of Day and End of Day Cash Drawer lists (where you specify how much cash is in each drawer).
Set Default Cash Float	If you start each day with fixed amounts and denominations of money in your cash drawer(s) you can click this button to indicate those denominations. At the start of the day, you can then use the Start of Day Tasks to automatically reset the cash drawers to their starting cash float values.

4.4.28 Postcode Lookups

In some locations it is possible to lookup parts of a customer’s address once you know their postcode/zip. In EVE you can associate postcodes with e.g. the city, state/region and country and then, on the Customer form, you can enter a customer’s postcode and tell EVE to lookup the other address information. E.g. you could enter 73003 into the postcode field and EVE would populate the City, State and Country to Edmond, Oklahoma, USA.

Note: some organizations provide lists of postcodes and their associated addresses. If you have such a list, you can import it into EVE using EVE’s Import from Excel feature - see section 3.2

4.4.29 QuickBooks Accounts

If you plan to export data from EVE to QuickBooks, you need to create a link between your QuickBooks accounts and your EVE accounts. Use QuickBooks Accounts to enter details of the account names you pre-defined in QuickBooks. EVE will export data to these accounts using the Export to QuickBooks option on the **Tools menu**.

You can either add account names by typing straight into the form (not recommended) or by using the QuickBooks Setup Wizard - see section 19.1.2 - recommended.

To use the Wizard, first export your account names from QuickBooks. Do this as follows

- ❖ Start QuickBooks and load your company file.
- ❖ Click **File** and then **Utilities** and then **Export**
- ❖ Click **Chart of Accounts** and then **OK**
- ❖ Enter a filename and save the file
- ❖ Switch back to EVE
- ❖ Click **Tools** then **QuickBooks** then **Setup Wizard**
- ❖ Click onto the **Accounts** tab and click **Import From File**
- ❖ Click **Import**. Select the filename you used above and click **Open**.

Note: sub-accounts will show in the grid with their parent, separated by a colon. For example, if the Checking account is a sub-account of Cash this will appear as Cash: Checking.

EVE does not need to know the type of each QuickBooks account - it will just export data to the accounts you specify regardless of the type.

Account	Account name. Must correspond exactly to the name in QuickBooks.
----------------	---

4.4.30 Report Types

You cannot add new Report Types but you can change the attributes of existing ones. Each type of data that can be printed in EVE is called a Report Type, for example, Invoices, Purchase Orders, Payment Details Report, etc. Each Report Type will have one or more Layouts. For instance the "Invoice" Report Type has 2 layouts called Receipt (for use on Desktop printers with A4/Letter sized paper) and Receipt #2 (for use on receipt printers that use a narrow paper roll). You can create your own layouts by saving an existing layout with a different name and then modifying it.

Report Type	The name of the report type - for example, Invoice, Purchase Order, etc
Default Layout	Pick the layout from the list of those that are appropriate for the report type. This will be used by default when you print an item. For example, choose Receipt #2 if you will usually print invoices to a receipt printer.
Auto-Save Image When Print	Put a checkmark in this box if you want EVE to save a JPEG image each time reports of this type are saved. The JPEG image will be an exact duplicate of

Performed	what is printed.
Image Folder	This specifies the folder where the Images are saved. By default this is c:\Program Files\Integrated Scuba Systems\User\SavedPrintouts
Filename Suffix	When saving image files, you can instruct EVE to add a suffix to the filename. For instance, if you want the date to be appended, use a Filename Suffix of <Date>. If you want the date and time to be appended, use <DateTime>
SQL	This is for future use.

Email tab

Default Subject Line	Some Reports can be emailed as well as printed. For these report types an Email tab appears on the Print dialog box. You can enter a default email Subject Line and email text here as well as specify which email address will be sent a blind copy of each email.
Default Body Text	
Text / HTML	For instance, for the Invoice Report Type, you could specify a Subject Line of "Your invoice is attached" and a Body Text of "Dear Sir/Madam Please find attached an invoice from your friendly dive store" Simple MailMerge of form fields can be applied so the Subject and Body of the email can include e.g. "Please find your %DataType% #Invoice# attached." which will appear as e.g. "Please find your Invoice #876 attached." The BCC line could be the store's email address so you can confirm the email was successfully sent and have a copy for your records.
Send A BCC (Blind Copy) To	

Layouts tab: this lists all the Print Layouts that can be used to print information of the type identified by the Report Type. E.g. if you view the "Invoice" Report Type, you'll see a paper roll receipt layout and a letter/A4 receipt layout.

4.4.31 Special Interests

If you run events unrelated to diving, you may want to record customers' outside interests in the Customers Module. Define the types of special interests that you want to record, for example, skiing, biking, golf, etc. Later, you can complete a search for, as an example, all people interested in golf and send out an invitation to the next golf day.

General

Special Interest	Enter the description of the Special Interest
------------------	---

Stores

Check the Stores that have access to this data special interest. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

4.4.32 Stores

Enter details about your Store(s). A store record was created when you first installed EVE and some of the data entered during that process will be shown here. You can modify or add to the data here. You will not need to create new Store records unless you open more Stores in different locations.

General

Store: ACME Diving

General Details EVE OnLine Data Data2

Store Name* ACME Diving ID 1

Pole Display Text

Address

Country UNITED STATES

Line 1 299 Mandon Blvd

Line 2

City Edmond

State Oklahoma

Postcode 73990

Contact Details

Telephone #1 +1 405 908 2323

Telephone #2

Fax

Email

Web

PADI

Store # S-121

Territory PADI Americas (HQ)

Cost Centers Applicable at the Store

☒ Langs

ISSYS PADI Pros

Account Name ACMEDiving

Password *****

Store Hours

Opening Time 10:00

Closing Time 20:00

Rental Day

Starts 11:00

Ends 19:00

☐ Unavailable? No. of PCs Allowed 5

Created 5/10/2010 8:25:19 PM

Last Updated 5/10/2010 10:05:20 PM

New Save Close

Store Name	Type the Store Name.
Pole Display Text	Type the message that you wish to display on the Customer Pole Display if you have one. If you do not enter anything, the Store name will be displayed.
Country	Address details of the store
Line 1	
Line 2	
City	
Region	
Post Code	
Store #	PADI IRRA number of your store or resort
Territory	The PADI territory in which your store is located, i.e. at time of writing one of PADI Americas, PADI EMEA, PADI Asia Pacific, PADI Japan.
Cost Centers Applicable At The Store	Some dive Centers run their business using more than one company or 'cost center'. For instance, they may have one company to handle shop sales and another to handle training or they may treat each store location as a separate company. EVE supports this using Cost Centers. Set up one cost center for each

	<p>company. Each can have its own tax registration number.</p> <p>If you have multiple stores defined and/or multiple Cost Centers you must indicate which cost center(s) are used at which store. The same cost center can be used at more than one store, and the same store can have more than one cost center.</p>
Telephone #1	Contact details
Telephone #2	
Fax	
Email	
Web	
Account Name	Enter your EVE Diving Account Name and Password. These are assigned to you when you first purchase EVE. You will need these details if you want to renew EVE on-line. The password is encrypted on the EVE database.
Password	
PADI Pros Account Name + Password	If you don't want to give out your PADI Pros login details to staff members just so they can use PICs OnLine, you can save them here. Then, when you use PICs OnLine, the values will be automatically defaulted for you on the PIC website. The password is encrypted on the EVE database.
Store Hours	Enter the time your store opens in the morning and the time it closes at night. If present, these are used as the default start and end time when you create Staff Schedules (unless you override these with different values using Defaults on the Staff Schedule form).
Rental Day	Enter the time you usually rent equipment from and to. EVE will use these as the default times on new rental bookings.
Check In	If you run a resort where you have rooms on-site, enter the times you like to have people check-in and check out. EVE will use these when you create room reservations.

Details

Store: Another Store

General Details EVE OnLine Data Data2

Seasons

SeasonID	Season	From Start Of	To End Of
1	Alta	May	September
2	Bassa	October	April

Edit

User Defined 1

User Defined 2

User Defined 3

New Save Close

Use the Seasons section to indicate when the Peak season starts and ends and when the Slow season starts and ends. This is used to determine the ideal and minimum stock levels that you want to hold for each stock item

(i.e. for a particular stock item you can indicate the number you want to hold during the slow season and the number you want to hold in the peak season). When using the Top-Up feature in the Purchase Order module, you can automatically create a Purchase Order to restock up to your ideal stock levels for the time of year.

Make sure you enter the months accurately so there is no gap between the end of the Slow Season and the start of the Peak Season - EVE will not check this if you make a mistake.

User Defined 1, User Defined 2, User Defined 3: use these boxes to enter whatever information you want about the store. You can right click on the "User Defined" text and click Translate to rename the box to indicate what the data represents. E.g. you could translate "User Defined 1" to "Store Manager" and then enter the manager's name in the first box.

EVE OnLine

This tab is only applicable if you use the EVE OnLine companion product to EVE. EVE OnLine is a complete e-Commerce package that can be linked to your web site. Your customers can use it to purchase goods and services on the web and transaction records are saved to your EVE database. E.g. if you choose, you can sell courses and trips on-line and customers will be automatically enrolled onto your EVE database. You can also sell your regular inventory products online. EVE can be used to administer your EVE OnLine settings.

When using EVE OnLine, you will need to set up a new Store record. This can be called whatever you like, but you may want to consider appending 'OnLine' as a suffix to the name of your 'bricks and mortar' store - e.g. Emerald Island Divers OnLine. This new store record will be used to handle all transactions created in EVE OnLine.

There are several sub-tabs where you can enter EVE OnLine configuration options.

Tax Exemptions

Store: Emerald Island Divers OnLine

General Seasons **EVE OnLine** Data Data2

☒ On-Line Store?

Tax Exemptions Options Shipping Product(s) of the Week Emails

Use this section to indicate which taxes new EVE OnLine customers are exempt from based on different circumstances. e.g. if new customers with a delivery address in a different country should be exempt from tax, add all tax bands to the second list.

Tax Exemptions for Out Of State on-line Customers (Australia, Canada, USA only)

Sales Tax 7.75%

Tax Exemptions for Out Of Country on-line Customers

Sales Tax 7.75%

Tax Exemptions for All on-line Customers

Finished

There are 3 list boxes that indicate how tax will be handled on line. Different tax laws apply in different countries. For instance, in the States you may wish to add all tax bands to the top list so that if a customer purchases goods using EVE OnLine and they live out of state, they will not be charged tax. Out of State tax exemptions can only be defined (if applicable) at time of writing to United States, Australia, Canada, Mexico and Brazil - i.e. those countries that PADI consider have 'States'.

You may also wish to indicate that, in your location, customers should not be charged tax if they live abroad. In that case, add the appropriate tax bands to the middle list.

In some cases, you may wish to indicate that all on-line customers are exempt from tax. In that case enter the appropriate tax bands in the third list.

In all cases, when a customer purchases goods or services online, EVE OnLine will examine the customer's shipping address and the appropriate tax exemptions will be applied at that time.

Options

Link EVE OnLine to Store	You can link the EVE OnLine store to the 'bricks and mortar' (BAM) store for the purposes of inventory handling. If you do this, each time an online sale is made, EVE OnLine will create a Transfer of inventory from the BAM store to EVE OnLine, and then the goods will be sold from EVE OnLine. In this way, you will only need to be concerned with stock levels at your BAM store.
Cost Center	Choose which Cost Center will be used in EVE OnLine. This governs the amount of tax to charge and the prices of online items. You can use the same Cost Center as your BAM store (recommended), or you can set up a new Cost Center specifically for EVE OnLine. Unless you want to charge different prices online, we recommend you use your existing Cost Center here.
Employee	Choose an Employee that will be associated with all online sales. This employee will be written to each Invoice record and is only used for reporting purposes. By default, this will be set to an Employee called EVE OnLine.
PC	Choose a PC that will be associated with all online sales. This PC will be written to each Invoice record and is only used for reporting purposes. By default, this will be set to a PC called EVEOnLine.
Currency	Use this to indicate which currency EVE OnLine should use for credit card payments.
Culture	Choose the culture appropriate for your location. This determines what

	currency symbol to display in your online store.
Course Enrollment Status	This option determines what enrollment status will be set when a customer purchases a course / trip online. E.g. you could choose from Enrolled, Provisional, Waiting List. Since at time of writing, customers are required to pay the full price for courses and trip on line, we suggest you choose 'Enrolled' here.
Trip Enrollment Status	
Category Header Text	This indicates the text that will be shown above the Category list in EVE OnLine. You might want to type e.g. 'Items' or 'Products'
The Server is X hours ahead of this Time Zone	If your database is hosted on our servers in the Eastern time zone of the USA, you should indicate here the number of hours your location is ahead of the server. This will result in the date/time that is written to invoices being in the same time zone as your bricks and mortar store.
Pricing Types	<p>Regular Price: If you want, you can have EVE Online show 2 prices for each stock item - the "Regular Price" and then "Our Price" - see below. The Regular Price will be crossed out to indicate that is not the price that will be charged. EVE OnLine will only display the Regular Price on a stock item if it is greater than Our Price.</p> <p>Our Price: Choose the pricing type to be used that governs the price of items to show in EVE OnLine. If you view the Prices page of a Stock Item, you'll see a number of rows in the Retail Price grid. You can enter a price into each of those rows to set the price for the item. You could create a new row in the grid (see Customer Types in section 4.4.10) called e.g. OnLine price and set a price for the item there that will be used when your customers purchase the product on-line. If you want to sell items at the same price on-line as in the store, then choose 'Retail' in the box.</p> <p>Minimum Price: Some manufacturers insist that their products are not sold on-line at less than a certain price. Choose the pricing type that indicates the minimum price for the item - EVE OnLine will never allow the price to fall below that value even if the customer gets specific discounts on certain items.</p> <p>Note: EVE OnLine will display "Regular Price" and "Our Price" next to the prices. If you prefer other text - e.g. "Usual Price" and "OnLine Price", you can click on the text and rename it.</p>
EVE OnLine is Read-Only	Put a check mark in this box if you want to advertise your goods and services on line, but do not want your customers to be able to purchase on line.
Show number of course places available	If you want to indicate next to each course on line, how many places are still available, put a check mark in this box.
Show number of trip places available	If you want to indicate next to each trip on line, how many places are still available, put a check mark in this box.
Show Medical Statement	When a customer purchases a course or trip on line, you can choose to show a Medical Statement that the customer must agree to having read. Put a check mark in the box if you want the Medical Statement page to be displayed.
Show Family Contact Details	When a customer purchases a course or trip on line, you can choose to show a page where they enter Emergency contact details (referred to in EVE OnLine as 'Family Contact Details'). Put a check mark in the box if you want the page to be displayed.
Show Trip Pickups	When a customer purchases a trip on line, you can choose to show a page where they enter a request to be picked up. Put a check mark in the box if you want

	the page to be displayed.
Include Tax in Displayed Prices	If you want tax to be included in all prices shown in EVE OnLine, put a check mark in the box
Stock Levels	<p>Indicate how you want EVE OnLine to handle stock levels. Choose “Don’t show No. In Stock” if you don’t want stock levels to be displayed at all. Choose “Show No. In Stock” if you want EVE OnLine to display the number in stock for each item. Choose “Show In Stock / Out of Stock” if you want EVE OnLine to display the text rather than the actual numbers.</p> <p>Choose “Don’t Show Items if out of stock” if you want items to be removed from EVE OnLine if they’re out of stock. They will be added back automatically once they are in stock again.</p>

Shipping

Store: ACME Diving

General Details **EVE OnLine** Data Data2

☒ On-Line Store?

Tax Exemptions Options **Shipping** Product(s) of the Week Best Sellers Emails Tags

Shipping Prices

Shipping Stock Type Shipping Charges

☒ Calculate Shipping Based on Weight ☐ Calculate Shipping Based on Invoice Total

Shipping Method	Zone	Lower Bound	Upper Bound	Price
Default				
FedEx	[Default]	0	12	\$22.00
FedEx	[Default]	12	30	\$32.00
FedEx	[Default]	30	99999	\$49.00
UPS	[Default]	0	15	\$20.00
UPS	[Default]	15	40	\$33.00
UPS	[Default]	40	99999	\$48.00

New Shipping Price Edit Shipping Price(s) Delete Shipping Price(s)

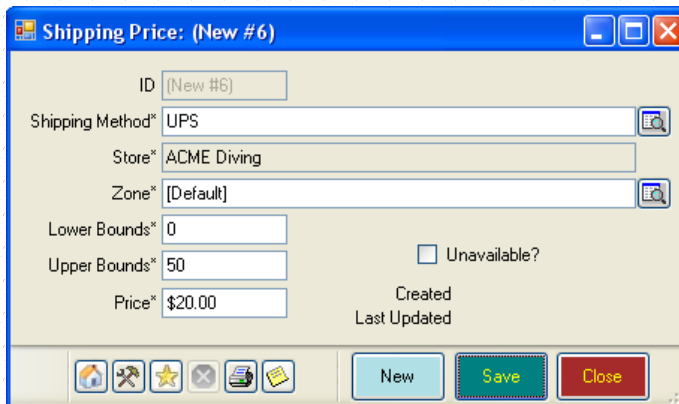
New Save Close

Use the Shipping page to set up how you want EVE OnLine to handle shipping/freight. Customers using EVE OnLine will be presented with a list of Shipping Methods that you define in EVE. These will be set up as Stock Items in EVE and will all have the Stock Type you choose in the Shipping Stock Type pick list. i.e. what you need to do is:

- 1/ create a new Stock Type called e.g. ‘Shipping Charges’, etc. (or use the one that is pre-installed with EVE).
- 2/ create one or more Stock Items with the Stock Type ‘Shipping Charges’. You could create stock items, e.g. for ‘Pick Up From Store’, ‘FedEx’, ‘UPS’, etc. Leave the price of each stock item at 0.
- 3/ On the Shipping tab above, choose your ‘Shipping Charges’ stock type.
- 4/ Click ‘New Shipping Price’ and then create ‘price bands’ for each shipping method. E.g. in the graphic above, the FedEx shipping price for a total item weight of between 0 and 12 lbs is \$22. The price for a weight of between 12 and 30lbs is \$32, etc. The units here are not important. You can choose to use whatever units you want - e.g. grams, kgs, lbs, ounces, etc. You just need to be consistent and use the same units when you specify the weight of items on the Stock Item form.

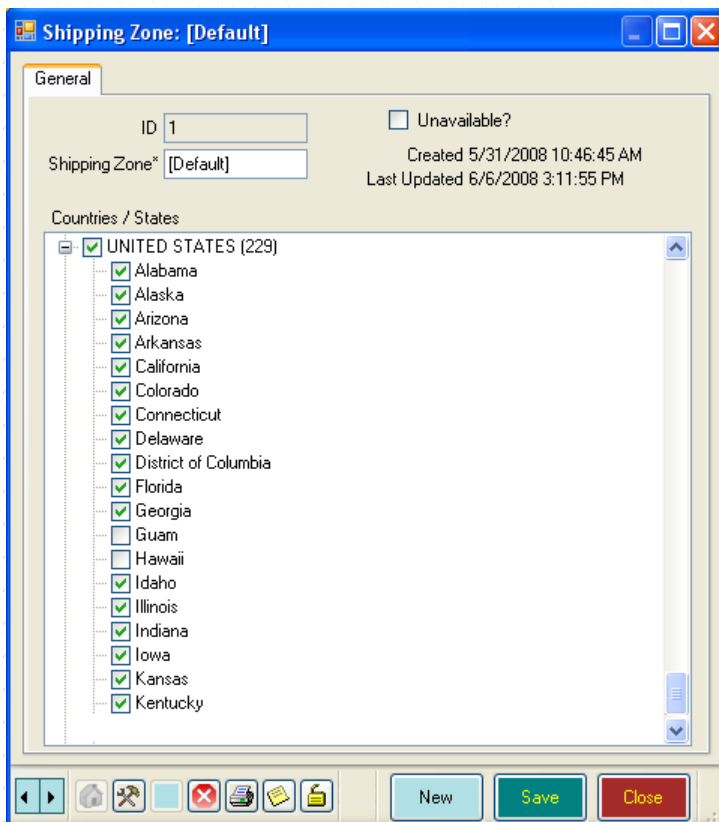
There are 2 option buttons shown: Calculate Shipping Based on Weight and Calculate Shipping Based on Invoice Total. You can choose how EVE OnLine calculates the shipping. If you choose the first option, you will need to set the weight of each stock item that you sell on line on the Stock Item form. If you choose the second option,

you do not need to define weights. EVE OnLine will use the total invoice price and lookup in your pricing bands for the appropriate shipping price based on value not weight.



When you click New Shipping Price, the form above will be shown. Choose the Shipping Method to which the price relates, choose the Zone. The Zone represents the list of countries / states that the price band refers to. For instance, if your Store is in California you might charge one price to ship to an address in California and a different price to ship to an address in Florida and a different price again to ship to an address in Hawaii. You can setup multiple Zones if you want and define on the Zone form to which countries / states it relates.

Choose the Lower and Upper bounds and set the Price.



On the Zone form, put a check mark against all countries and states (if applicable) you want to allow shipping to. Make sure the country that your EVE OnLine store is in (i.e. the Country on the General tab of the Store form) is checked. In EVE OnLine, if the customer supplies a shipping address to a country or state that is not checked, a message will indicate they need to choose a different shipping address.

Product(s) of the Week

The screenshot shows the 'Store: Emerald Island Divers OnLine' application window. The 'EVE OnLine' tab is selected, and the 'Product(s) of the Week' sub-tab is active. A checkbox for 'On-Line Store?' is checked. Below it, a text box states: 'You can add up to 5 Products of the Week. The first item in the list will be the most prominently displayed in EVE OnLine.' A table lists three products:

ID	Stock #	Stock Item	Stock Type	
7927	05.031.220	Aladin Prime 2 Gauge Console, Imp...	Computers	S
16888	40.3540.53	ALPHA 8 OCTOPUS, YELLOW	Regulators	0
10062	BC2030BLUE...	AIRCELL - CLASSIC WING 12" w/...	BCDs	0

Below the table are 'Add' and 'Remove' buttons. At the bottom of the window are 'New', 'Save', and 'Close' buttons.

In EVE OnLine, a Product of the Week page will be shown when a customer logs in. You can indicate on this tab, which product(s) will be displayed. The first item in the list will be displayed more prominently than the others.

Emails

The screenshot shows the 'Store: Emerald Island Divers OnLine' application window with the 'Emails' sub-tab selected. It contains several email configuration sections:

- Email 'From' Address:** info@issys.co.uk
- Store Email Recipients:** info@issys.co.uk, roger.m.lockwood@gmail.com
- Confirmation to Store of New OnLine Order:**
 - Email File: ~/App_Data/MailerTemplates/Mail
 - Subject: ISSYS - New order has been place
 - ☒ Send as HTML?
- Customer Invitation to Course/Trip Booking:**
 - Email File: ~/App_Data/MailerTemplates/Me
 - Subject: ISSYS - Registration invite
 - ☐ Send as HTML?
- Confirmation to Customer of New OnLine Order:**
 - Email File: <DocDir>/StoreFiles/Documents/E
 - Subject: wilcommen
 - ☒ Send as HTML?
- Confirmation of New Customer Registration:**
 - Email File: ~/App_Data/MailerTemplates/Me
 - Subject: ISSYS - Welcome
 - ☐ Send as HTML?
- Forgotten Password:**
 - Email File: ~/App_Data/MailerTemplates/Me
 - Subject: ISSYS - Username and password r
 - ☐ Send as HTML?

At the bottom of the window are 'New', 'Save', and 'Close' buttons.

Email 'From' Address: specify your store's email address or other email address that you want emails sent by EVE OnLine to be from.

Store Email Recipients: specify a comma-separated list of email addresses that you want confirmation emails to be sent to. E.g. your store email address and your personal email address.

Various emails are sent by EVE OnLine. The text of those emails is held in files on the EVE OnLine server. You can use these default email texts or you can write your own and save them to a file on the EVE OnLine server. Please contact EVE Diving if you want to do this.

Confirmation to Store of New OnLine Order: sent to you when a customer makes a purchase online.

Confirmation to Customer of New OnLine Order: sent to the customer when they make a purchase online.

Forgotten Password: sent to the customer if they indicate in EVE OnLine that they have forgotten their password.

Customer Invitation to Course/Trip Booking: In EVE OnLine, customers can invite other customers onto course and/or trip bookings. This email is sent to the customer being invited during that process.

Confirmation of new Customer Registration: sent to the customer when they sign up for an account on line.

Tags

One method by which Google ranks websites in searches is using Tags on web pages. You can enter Tags for EVE OnLine's 'Home' page, Product List page, Product Details page, Courses page and Trips page. E.g. on the Courses page you might provide tags like "PADI,Scuba,Diving,Classes"

Data

Data Type	Sea Lions	Ocean Pro Divers	EVEOnLine
Courses	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gift Cards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gift Certificates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Label Queue Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PCs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Purchase Orders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quotes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Rental Bookings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Report Dates	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Serial Numbers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Bookings	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Special Orders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tasks	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Trips	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The Data tab is used only if you have multiple stores. You can use it to indicate which types of data are visible at which store. For instance, in the diagram above, we are viewing the store record for Ocean Pro Divers. The selections indicate that all types of data entered at Ocean Pro Divers are visible at Ocean Pro Divers (all rows are checked). However, Courses created at Ocean Pro Divers are not visible at Sea Lions or EVEOnLine. Neither are Purchase Orders, Rental Bookings etc. Customers, Gift Cards, Gift Certificates and Invoices created at Ocean Pro Divers are visible at all stores.

Click the **Select All** button and **Deselect All** buttons to speed your data entry. You can ignore the following if you only have one store.

If you have for example, 2 stores in New York and 1 in LA you may want to inform EVE which types of data should be available to each store. NY1 could be set up so it can view data entered either at NY1 or at NY2 but not at LA3. Likewise, NY2 could be set up so it can view data entered either at NY1 or NY2 but not LA3. LA3 could be set up so it can only view data entered at LA3. There is not much point in the LA store being able to view data entered in New York but there is good reason for both New York stores to share data so that customers at both stores can be enrolled on the same course, customers can return goods entered at one store to the other, etc.

Data2

Store: Ocean Pro Divers

General Seasons EVE OnLine Data Data2

You can indicate which data you want to be visible at each store. Put a check mark in a Store column if you want the data to be visible at that Store.

Cost Centers Course Types Customer Types Denominations Destinations Employees

Course Type	Sea Lions	Ocean Pro Divers	EVEOnline
Advanced Nitrox & De	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advanced Openwater	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advanced Openwater	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adventure Diver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Altitude Diver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assistant Instructor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWARE - Coral Reef	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AWARE - Fish Identific	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Basic Scuba	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Boat Diver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bubble Maker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cavern Diver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CPR WITH AED	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CPR/FA/CFC/AED	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Deep Diver	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select All Deselect All

New Save Close

The Data2 section is only applicable if you have multiple stores.

Some types of data require more fine-tuning. For instance, particular Stock Types may be applicable at one store but not others - Surf Boards may be sold at the store on the ocean but not at the store further inland. You can use the Data2 section to indicate which records apply to which store.

In the diagram above, all course types are taught at all stores except the AWARE courses which are not taught at Sea Lions.

4.4.33 Task Types

General

Task Type	Enter types of task that you will assign to employees, for example, 'Prepare rental gear', 'Confirm course participants', 'Clean Store' etc. You can assign tasks to specific employees and they will see those tasks scheduled on their calendars.
Course Role	When setting up Courses (see section 9), you can assign staff to each course along with their role - e.g. instructor, Divemaster, etc. You can choose from a picklist of Task Types that have a tick in the Course Role box. Periodically (e.g. weekly, monthly) you can run reports to see how much each staff member needs to be paid based on the tasks they have performed.
Trip Role	Similarly, you can assign staff members to Trips and Day Trips. The roles applicable there comprise those Task Types that have a tick in the 'Trip role' box.
Commission Stock Item	You can run reports to calculate how much each staff member should be paid for the tasks they have completed. If you want to use this feature, you must assign a Stock Item to each applicable Task Type. The price set on the stock item governs how much the staff member will be paid for performing the task. For those stock items that relate to commissions, EVE will show a picklist at the bottom of the Prices tab (see section 5.1.5) called Pricing Method. The picklist contains items such as 'One Off', 'Per Day', 'Per Hour', 'Per Month', etc. Which item you choose in the picklist determines whether the price on the stock item is the price that will be paid for the task regardless of how long it takes (i.e. choose the One Off entry) or whether the price is e.g. determined on the number of hours, minutes, etc. that the staff members works on the task for. E.g. if you choose 'Per Hour' and set a price on the stock item of \$10 and the staff member works on the task for 3 hours, then you'll pay them \$30.
Pay Commission on Tasks marked as Complete	Choose this option if you will only pay staff members for Tasks that are marked as Complete (see section 14.2.1). Only complete tasks will be included when you run the EVE report to calculate pay.
Pay Commission on	Choose this option if you will pay staff members for Tasks of this type regardless

all Tasks regardless of Status	of the status on the task (complete / incomplete / etc). Tasks will contribute to the pay in this case provided the End Date on the task is in the past. You may want to use this option on frequent tasks - e.g. 'Manning the store' - for which it would be a lot of work to have to change the status on each occurrence.
Calendar Colors	Choose your Calendar Colors for the task type. These colors will be used in the Calendar (See Section 15.Calendar) for any tasks associated with this task type. For instance, you could configure the calendar so all Pack Rental gear tasks appear in red, while all Confirm Course Participants tasks appear in blue.

4.4.34 User Interface Configurations

EVE has a customizable User Interface that you can configure to meet the needs of your business operation. You may use only one interface if your dive center has only a few employees or you may have multiple interfaces for different employee groups (for example, Instructors may have access to only Customers, Rental Equipment and Courses while store employees may have access to Sales, Trips, Courses and Customers, etc.). You can choose which navigation items are displayed on the Main form for each interface. EVE comes preloaded with several interfaces that you may want to use as the basis for customization. You can change the User Interface (if authorized) by clicking the UI button at the top right of EVE.

General



Configuration Name	Enter the name of the User Interface. This will be available from the drop down list box at the top right of the Main form.
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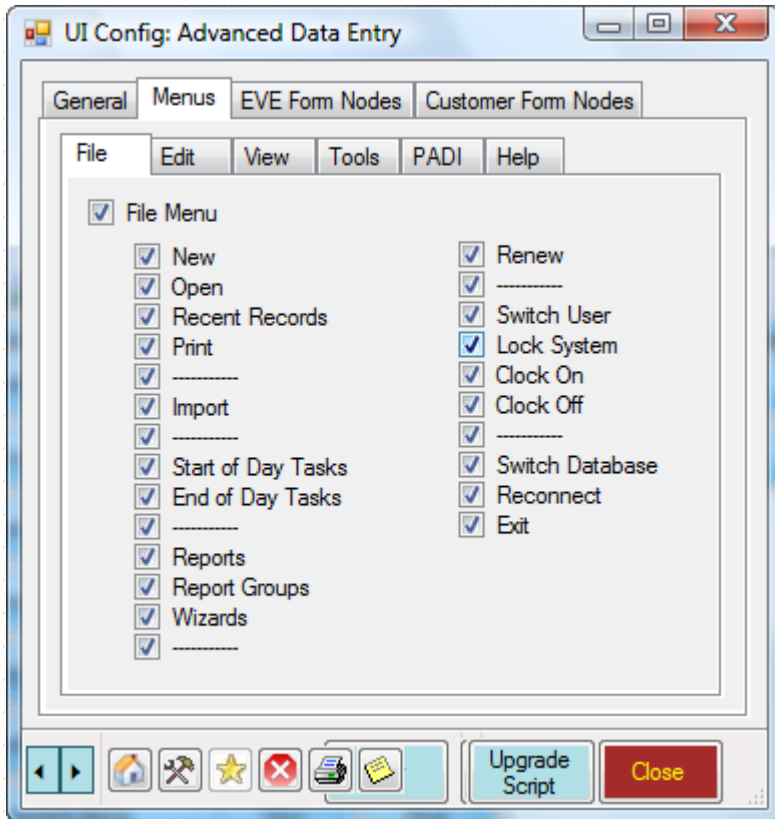
Toolbars

Button Bar	Check the checkbox for the navigation tools you want displayed on the Main form when this User Interface is in effect. For more information on navigation, see Navigating EVE.
Module Buttons	
Coolbar	
Status Bar	
Detail Window	

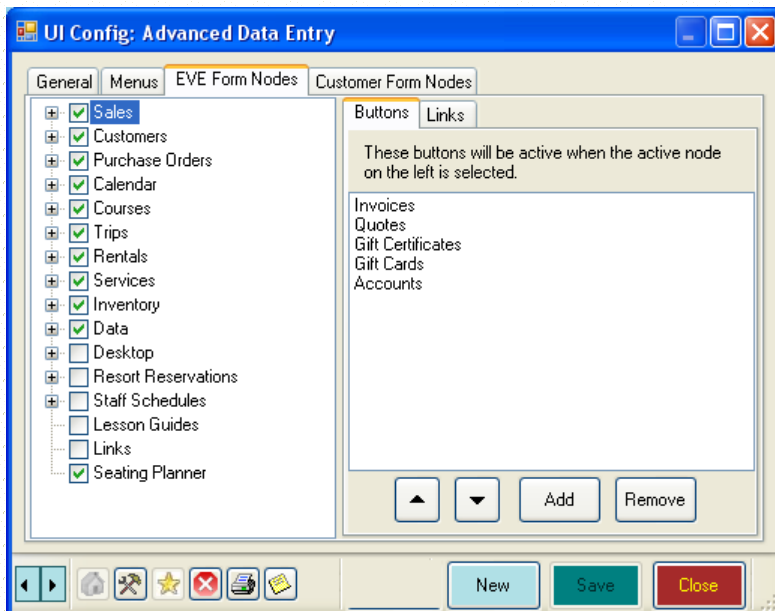
Button Array	
Hierarchy	

Menus

Put a tick next to each menu that you want to be available to users of the User Interface.

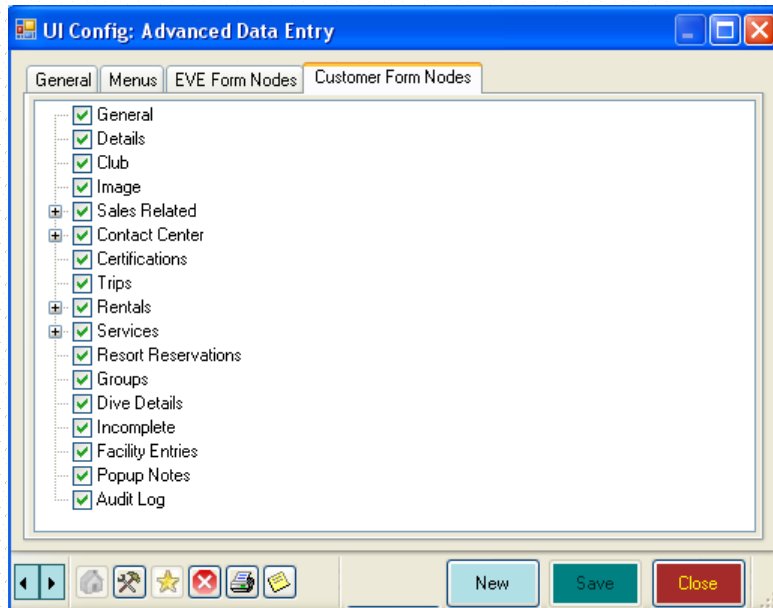


EVE Form Nodes



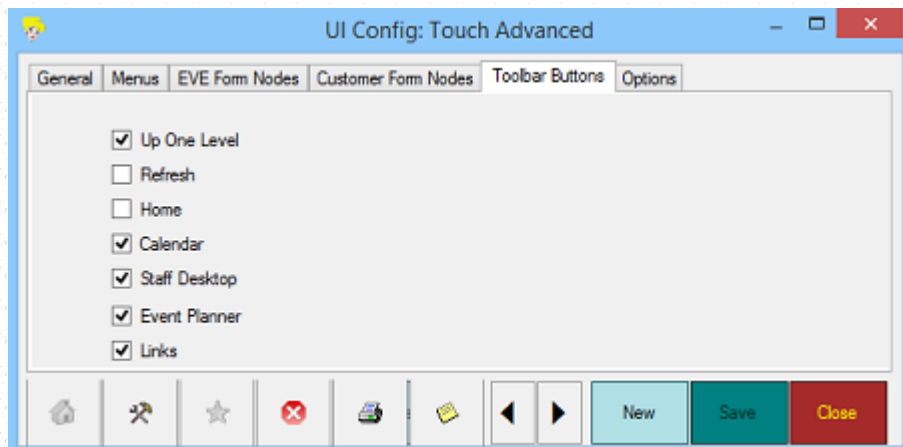
EVE Form Nodes	Choose the Nodes you want displayed in the Hierarchy at the left of the main EVE form when this User Interface is active. You can move through the Nodes in much the same way as moving through Windows Explorer. Click on the + symbol to expand a selection. As the selection expands, additional processing or instant reports will become available.
Buttons	Use Buttons to define which buttons will display in the Button Array (if it is active) when you select a particular Node in the Hierarchy. When you click the Add button, a full list of button alternatives will be displayed in a pop up list box. To remove a button, highlight the button name and click the Remove button. You can change the order of items by highlighting a button name and pressing the up or down arrow.
Links	Use Links to define which instant reports will display underneath the Button Array (if it is active) when you select a particular Node in the Hierarchy. When you click the Add button, a full list of instant report alternatives will be displayed in a pop up list box. To remove an instant report, highlight the report name and click the Remove button. You can change the order of items by highlighting an instant report name and pressing the up or down arrow.

Customer Form Nodes










Indicate which nodes you want to appear in the hierarchy at the left of the Customer form when this User Interface is active.

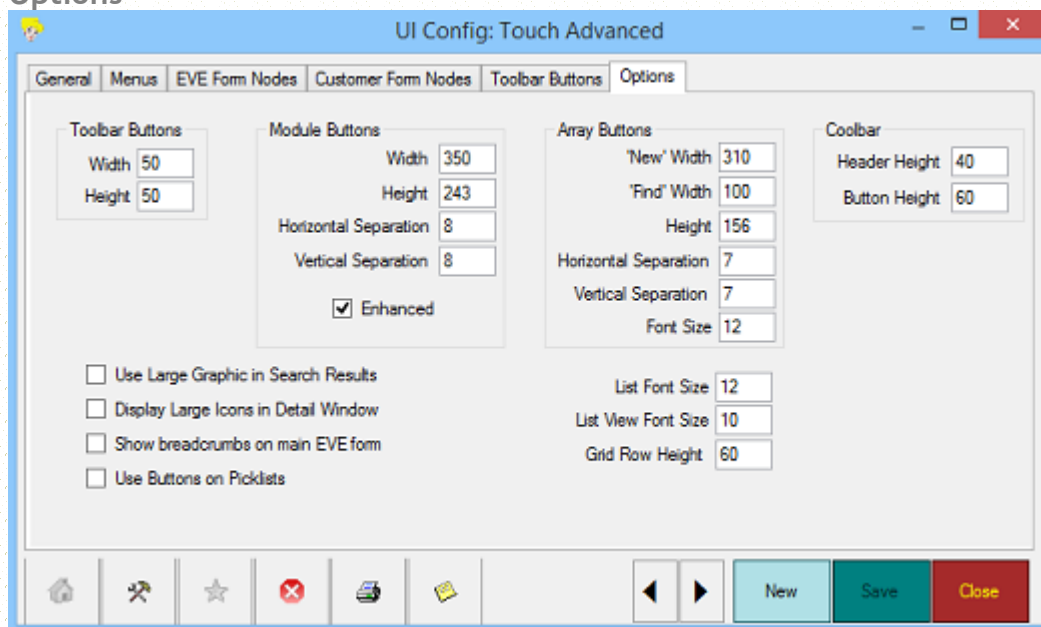
Toolbar Buttons



Put a tick in the appropriate boxes to indicate which of the toolbar buttons at the top left of the main EVE form are visible in the User Interface.

-  'Up One Level' is the button that moves the user to the parent folder when the Hierarchy window is visible.
-  'Refresh' refreshes the contents of the Detail windows if that is turned on.
-  'Home' is the button that takes you back to the top level in the Hierarchy window.
-  'Calendar' is the button that displays the calendar in a new window.
-  'Staff Desktop' is the button that displays the staff desktop in a new window.
-  'Event Planner' is the button that displays the Event and Seating Planner in a new window.
-  'Links' is the button that shows website and program links that you have defined.

Options



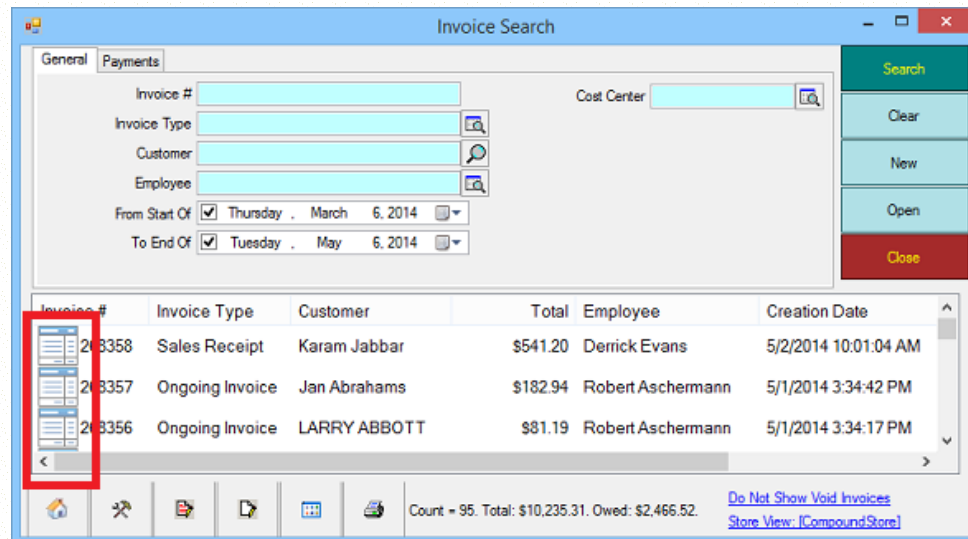
Toolbar Buttons

Set the width and height of the toolbar buttons that are shown at the top left of the main EVE form and also the toolbar buttons at the bottom left of data entry forms.

<p>Module Buttons</p>	<p>The Module Buttons section governs how the module buttons look if the Button Array is turned on - i.e. the Sales, Customers, Courses, Data, etc. buttons.</p> <p>Set the width and height of the module buttons.</p> <p>Horizontal Separation: If there are too many module buttons to fit in one column on the screen, they will wrap to a 2nd and 3rd, etc. column. The Horizontal Separation governs the horizontal distance between those columns.</p> <p>Vertical Separation: this indicates how much vertical space there is between module buttons.</p> <p>Enhanced: if this is checked, EVE will show a graphic and a description on each module button:</p> <div data-bbox="418 527 1130 772"> </div> <p>If not checked, a simpler style is used:</p> <div data-bbox="418 835 1378 938"> </div>
<p>Array Buttons</p>	<p>The Array Buttons section governs how the data-type buttons look if the Button Array is turned on - i.e. the Invoices, Quotes, Stock Items, etc buttons.</p> <div data-bbox="418 1041 1378 1268"> </div>
<p>Coolbar</p>	<p>This section governs the appearance of the Coolbars that are shown on the right of some data-entry forms e.g. Invoice, Quote, Rental Booking, etc.</p> <p>Header Height: this is the height of each Coolbar section - e.g. in the graphic below it is the height of the Customer and Stock Items buttons.</p> <p>Button Height: this is the height of each button in a section - e.g. in the graphic below it is the height of the Search and Items Awaiting Payment, etc. buttons</p> <div data-bbox="418 1528 544 1908"> </div>

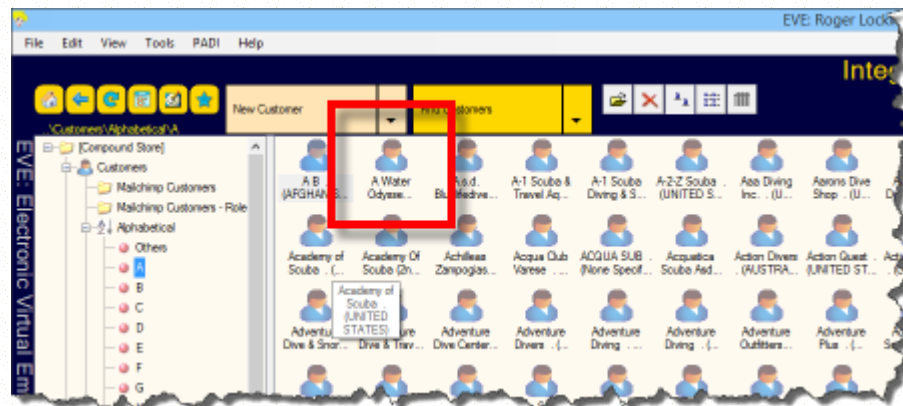
Use Large Graphic in Search Results

Put a tick in this box to use a large graphic at the left of the results list on all Search forms - see screenshot below. You may find this useful if you use a touch screen as, the effect of using a large graphic is that each line in the results increases in height so fat fingers can touch the correct line.



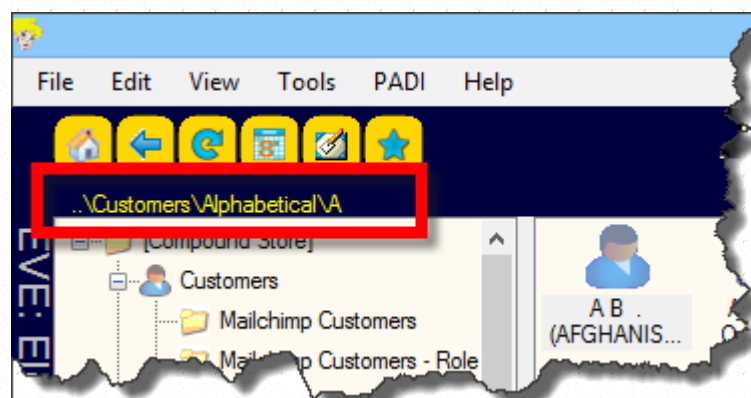
Display Large Icons in Detail Window


Put a tick in the box to use a large graphic when information is displayed in the Detail window. You may find this useful if you use a touch screen.



Show breadcrumbs on main EVE form

'Breadcrumbs' refers to the text at the top left of EVE underneath the toolbar buttons. They indicate which folder you are currently viewing in the Detail window (if that is turned on).

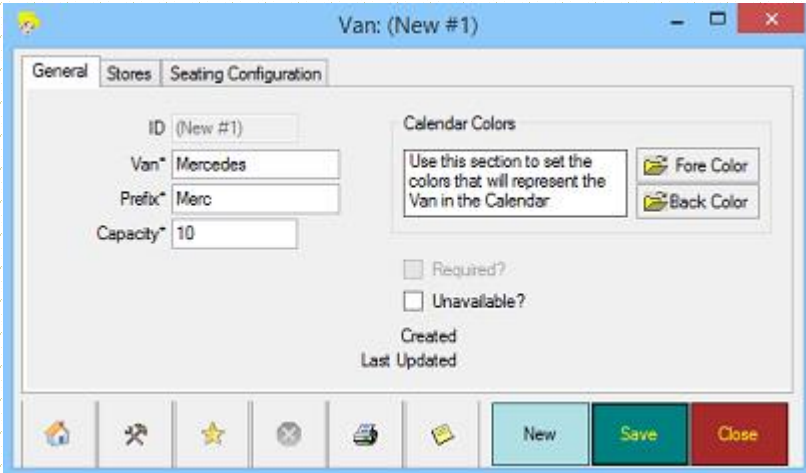


Use Buttons on Picklists	Put a tick in this box if you want pick-lists to be displayed with large buttons rather than the usual listbox of entries. You may find this option useful if you use a touch screen.
	
List Font Size	Set the size of the Font that is used when Lists are displayed. The default is 12.
List View Font Size	Set the size of the Font that is used when List Views are displayed (i.e. tables such as on Search forms that display the results)
Grid row Height	Set the size of editable Grids - e.g. the Shopping Basket grid on the Invoice form, or the Dive Bag grid on the Rental Booking form.

4.4.35 Vans

You will use Vans to organize pick-ups for customers at resorts.

General



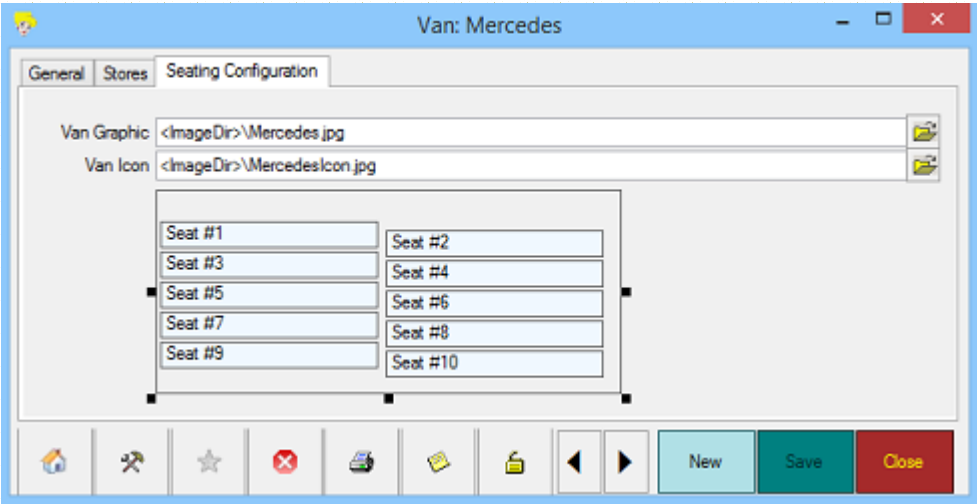
Van	Enter the Van/Bus name or description (for example, make and model or license number, etc.)
Prefix	Enter a short name for the Van that will be used to generate a unique identifier for each Pickup record if you plan to pickup customers for trips. This is only applicable if you have removed the tick from the "Use 'Classic' Style Pickups" box on the Trips page of the Options form - see section 4.3.6
Capacity	Enter the Capacity of the van as a number. The Capacity should reflect the total number of passengers (divers and non-divers) including any staff that you wish to assign to the van.

Stores

Check the Stores that have access to this van. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

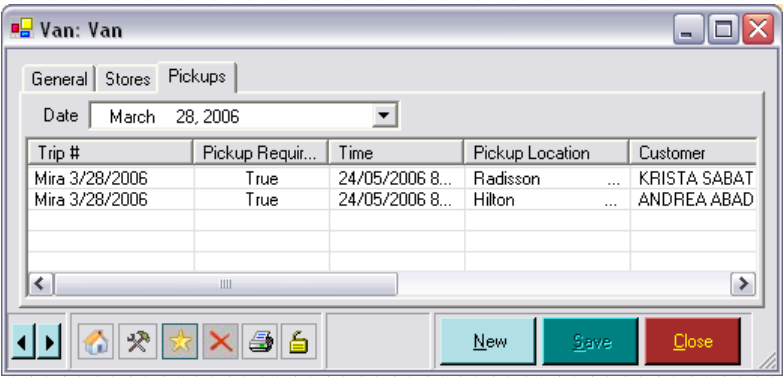
Seating Configuration

This is only applicable if you have removed the tick from the “Use ‘Classic’ Style Pickups” box on the Trips page of the Options form - see section 4.3.6. Once you have defined the Capacity on the General tab of the Van form, EVE will display the same number of light blue boxes on the Seating Configuration tab. You can drag these about on the form using your mouse to match the seating configuration of your physical van/bus. Then, when you use the Seating Planner to assign places to a Trip Pickup the same configuration will be displayed so you can drag and drop customers onto the appropriate seat.



Pick Ups

This tab is only applicable if you have ticked the “Use ‘Classic’ Style Pickups” box on the Trips page of the Options form - see section 4.3.6. The tab will display the pick-ups required for a specific day. When Selling Trips (See Section 6.1.5.Selling Trips), customers will let you know if they need pick up arrangements. You can display and print the specific pick up details for each Van using this form.



Date	Select a calendar Date from the drop down calendar.
Trip #	The pick up details (as determined when Selling Trips (See Section 6.1.5.Selling Trips) will be displayed here.
Pickup Requirements	
Time	

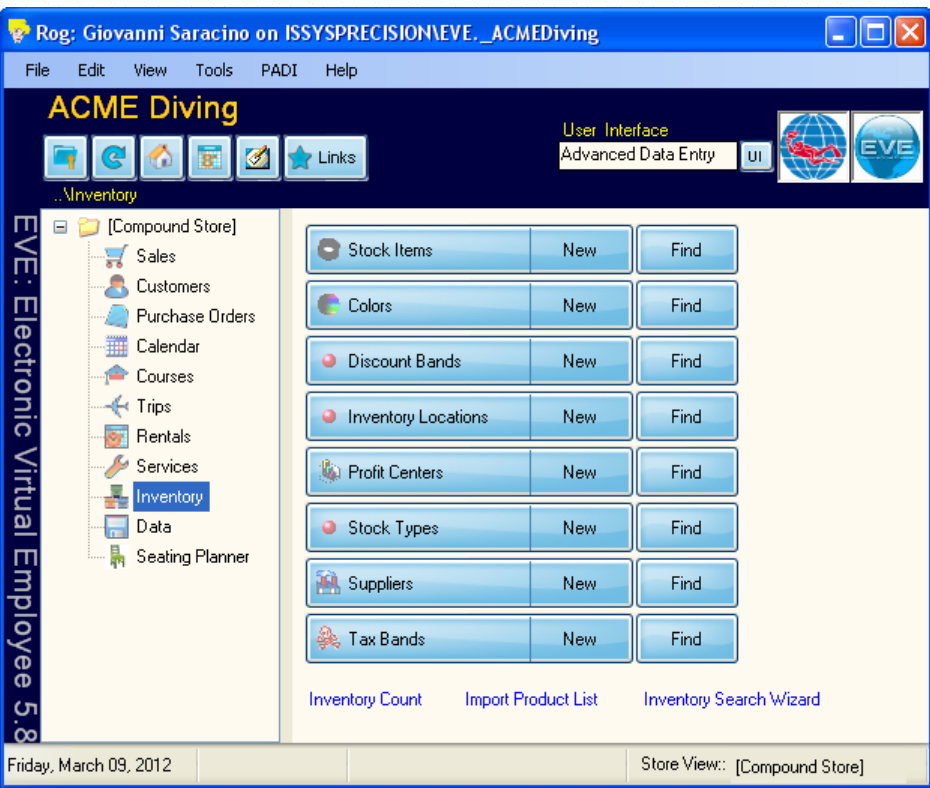
Pickup Location	
Customer	

5 INVENTORY DATA

You will also need to define the data specific to your inventory and stock. This is the data that will appear in pop up list boxes throughout the application.

Inventory data needs to be set up when you install EVE and will then remain largely untouched unless you add new inventory items or change prices, etc.

To define your inventory, load the Inventory Module if you have not already done so. A list of all data types available will be shown in the Button Array. Choose **New** from any data type to add a new data element. Choose **Find** to search for an existing data element.



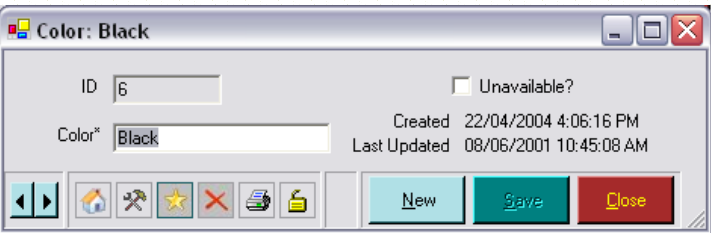
When you select **New**, a form will appear allowing you to create new information.

5.1 Defining Inventory Data

5.1.1 Colors

Enter Colors that are appropriate to describe equipment and stock items. EVE comes pre-installed with a few records.

General



Color	Enter the name of the color.
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5.1.2 Discount Bands

If you are planning to offer discount prices to privileged customers, you can pre-define the standard Discount Bands to be used. Each discount band has an identifying name (for example, "10% off"), a formula to calculate the price (for example, $[RP] - 10\%$ where $[RP]$ represents the Retail Price), and a minimum formula, used to calculate the minimum price below which the price will not be allowed to fall (for example, $[CP] + 5\%$ where $[CP]$ represents the Cost Price). The minimum formula is important as otherwise the standard formula may calculate a price below the cost price for an item that has a small or no margin.

Discount Band	Description of the Discount Band (for example, 10% off).
Formula	<p>Enter the Formula used to calculate the discounted price</p> <p>Currently, only simple formulas are supported of the form:</p> <ul style="list-style-type: none"> ❖ $[RP] - 10\%$ ❖ $[RP] - 20\%$ ❖ $[CP] + 5\%$ <p>Where $[RP]$ is the retail price and $[CP]$ is the cost price. Be careful to type the format exactly.</p> <p>You may want to use $[RP]$ in the standard formula (for example, $[RP] - 10\%$) and $[CP]$ in the minimum formula (for example, $[CP] + 5\%$).</p> <p>As well as percentage values you can apply a fixed amount off or over the Retail or Cost Price. E.g.</p> <p>$[RP] - 2$ would indicate the discount price is 2 units below retail price (where a unit would be a dollar in the States, a pound in the UK, etc).</p> <p>$[CP] + 4$ would indicate the discount price is 4 units above cost price.</p>
Min. Formula	Enter the formula used to calculate the minimum discounted price on offer.
Privilege Level Required for Manual Use	<p>Some discount bands will only be used by EVE if you have defined them to be automatically assigned to particular types of customers (see section 4.4.10 Customer Types). If this is the case, choose 'The discount band cannot be manually assigned'. Other discount bands will be used by your employees to manually assign a discount in the sales module (See Section 6.1.1.Selling Stock Items). You can use up to 3 levels of discounts: Low Discount Bands (for use by regular sales staff - e.g. 2% Off), Medium Discount Bands (for use by middle management - e.g. 5% Off) and High Discount Bands (for use by you - the store owner - and other trusted staff - e.g. 20% Off). Choose which level you want the current discount band to be in. Then assign the necessary privilege to each staff member - see section 4.4.15 - to indicate which level of discount</p>

	band they can use.
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5.1.3 Inventory Locations

Use Inventory Locations to identify where your Stock Items are located in the store or warehouse. You can set Inventory Locations for the Locations that you use at your dive center. For example, for the Warehouse location, you could specify Inventory Locations of Row 10 Top Shelf, Row 11 Second Shelf, etc. When you have defined your Inventory Locations you can then assign them to individual stock items. In this way you can indicate where the item is sold in the shop and where it is stored. Later, you can perform searches to find which areas of the shop are most profitable.

General

Inventory Location	Enter the name of the Inventory Location.
Location	Choose the Location from the pop up list box.

Stores

Check the Stores that have access to this Inventory Location. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

5.1.4 Profit Centers

Profit Centers allow you to group together Stock Types for reporting purposes. For example, you may want to create a Profit Center called Diving Equipment and then assign the following Stock Types to it: Wetsuits, Dry Suits, Air Tanks, Masks, Fins, Snorkels, etc. Using the Sales Reports you can then report on sales of each Profit Center.

Note: do not confuse Profit Centers with Cost Centers. Cost Centers are companies. Profit Centers are simply a grouping of Stock Types for reporting purposes.

General

Profit Center	Description of the Profit Center - e.g. Diving Equipment, Swimming Equipment, Training, etc.
Sales Account	If you export data to QuickBooks, you need to inform EVE about which QuickBooks Accounts will accept data from which Profit Center. Choose an Account from the pop up list box.
COGS Account	
Inventory Account	
Appear In Profit Center Breakdown Reports Memo Section	The Profit Center Breakdown Report summarizes cumulative sales, refunds and Cost of Goods Sold (COGS) by profit center for a defined period of time. In addition, you can list sales of items that don't contribute to your profit (for example, gift certificates and gift cards) but that you wish to track for business purposes. Put a check mark in this box if the Profit Center does not contribute to profit.

Stores

Check the Stores that have access to this profit center. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

5.1.5 Stock Items

In this section enter details of Stock Items that you sell in your shop. This is one of the key data elements for dive centers and resorts. Rather than typing in details of each stock item, you may find it easier to import the information. Stock Items can be imported from Microsoft Excel (see section 3.2). You may be able to obtain product lists from your suppliers in electronic format and these can be modified to be in the correct Excel format and then imported straight into EVE.

EVE uses some Stock Items internally for specific purposes. You can modify the attributes of these Stock Items if you wish. For example, you could change the description of the Equipment Service Stock Item to Work Order, but do not change it to e.g. Wetsuit. EVE uses the ID value to determine what functionality is associated with certain Stock Items. For example, EVE knows that the stock ID with ID 3 represents a Labor charge, regardless of the description. Below are listed these 'special' stock items.


0. Imported	If you were a Scubaware user and you archived some of your Stock Items before importing the data into EVE, the import process assigns a value of 0 for the Stock Item ID on imported invoices where the associated Stock Item no longer exists.
1. Equipment Rental	When an equipment rental booking is added to an invoice in the Sales Module,

	EVE uses the Equipment Rental Stock Item to represent the booking.
2. Equipment Service	When an equipment service booking is added to an invoice in the Sales Module, EVE uses the Equipment Service Stock Item to represent the booking.
3. Labor	When an equipment service booking that contains a labor charge is added to an invoice in the Sales Module, EVE adds a labor line item to the invoice automatically. EVE uses the Labor Stock Item to represent the labor charge.
4. Handling	When an equipment service booking that contains a handling charge is added to an invoice in the Sales Module, EVE adds a handling line item automatically. EVE uses the Handling Stock Item to represent the handling charge.
5. Gift Certificate	EVE comes with a default gift certificate Stock Item. You can change this (for example, to change the denomination) or add further Gift Certificate Stock Items yourself.
10. Expenses	Expenses are used when money is taken out of the cash drawer as petty cash to purchase supply items for the store or when you “sell” inventory to the store for internal use on a course or a trip. You can associate expenses with a course or a trip and automatically create an expenses invoice. EVE comes with a default Expenses Stock Item.

General

Use the General tab to define the primary information regarding each Stock Item. This is the information you will use to search for stock when Selling Stock Items (See Section 6.1.1.Selling Stock Items).

Description	Enter the Description of the Stock Item that will appear on invoices
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Stock #	Enter the unique Stock # (SKU) for the item. It is recommended that you assign a unique number here where possible. EVE will allow you to create duplicates but it will warn against it.
Barcode #	<p>Enter the Barcode # for the item if there is one. This value must be unique. To the right of the text box is a button marked with an exclamation mark. Click this to instruct EVE to generate a barcode number for you. A sequential number is used.</p> <p>You can click on the Toolbox icon  and then click Seed Barcode # to set the starting Barcode # which EVE will use when generating barcodes.</p> <p>If the packaging for the stock item has a barcode on it already that was printed by the Manufacturer, you can use this in EVE. The simplest way to enter this is to set focus to the Barcode # field and scan the barcode. Otherwise, you can just type the number.</p>
Stock Type	<p>Pick this from the list of pre-defined Stock Types. You will be able to search on Stock Type when Selling Stock Items (See Section 6.1.1.Selling Stock Items).</p> <p>Only those Stock Types that have been marked 'For Sale' will be displayed.</p>
Sub Stock Type	<p>Pick this from the list of pre-defined Stock Types. You will be able to search on Sub Stock Type when Selling Stock Items (See Section 6.1.1.Selling Stock Items).</p> <p>This may not be applicable for all stock items. However you may want to, for example, set the Sub Stock Type to Accessories when the main Stock Type is Regulators.</p>
Manufacturer	Pick the Manufacturer from the list of pre-defined Suppliers. The supplier and manufacturer will often be the same company, but you may purchase some items from a distributor. In that case, pick the Manufacturer here and choose the distributor on the Suppliers tab - see below.
Primary Color	Pick the Primary Color of the Stock Item from the list of pre-defined values.
Secondary Color	Pick the Secondary Color of the Stock Item, if applicable, from the list of pre-defined values.
Size	Pick the Size of the Stock Item, if applicable, from the list of pre-defined values.
Commission %	<p>The commission that you pay to your staff members is calculated by one of the following formulas:</p> <ul style="list-style-type: none"> ❖ Net Price * Employee Commission Rate * Stock Item Commission Rate ❖ Net Profit * Employee Commission Rate * Stock Item Commission Rate <p>Values using both formulae are displayed in the commission Reports (See Section 18.2.Reports). You choose which one to use.</p> <p>Each employee can be on a different commission rate and you can encourage employees to sell specific items by increasing the commission rate on those items.</p> <p>Enter the Stock Item commission rate here.</p>
Loyalty %	<p>If you have ticked the "Automatically Assign Loyalty Credit when Invoice Saved" box on the Customers tab of the Options form (see section 4.3.3), then loyalty credit is assigned to the customer's loyalty card each time they purchase goods. The amount of credit is calculated on each item purchased by: Qty * Net Price * Loyalty % / 100. E.g. enter 5 to indicate the customer will earn \$5 credit on a</p>

	purchase of \$100.
Description #2	You can choose to enter a second Description of the Stock Item. This could be used to enter the description in a second language in multi-lingual locations.
Multi-Sale Item	<p>Some dive stores sell Air Fill cards. The customer buys, for example, 20 air fills and then has his card marked each time he uses one of the fills. EVE supports 'virtual' air fill cards. To set one of these up, check the <i>Multi-Sale Item</i> checkbox. The Quantity box becomes enabled so you can enter the number of items (i.e. fills).</p> <p>In a similar way, you could put a check mark in the Multi-Sale item box to indicate that multiple trips on the store's dive boat are being purchased, etc.</p>
Quantity	Enter the Quantity associate with the Multi-Sale Item. E.g. if they are buying 10 air-fills, enter 10.
Image	<p>If the manufacturer has supplied you with an Image of the Stock Item, you can enter the pathed filename (i.e. filename including the folder) of the image file. The image can be shown at the point of sale if you want to show the customer some detail of the item being sold. It can also be used in the companion product to EVE: EVE OnLine.</p> <p>Up to 5 images can be linked to the stock item.</p>
Image Scale To Fit	If you have attached an image file of the stock item, you can select the <i>Image Scale to Fit</i> checkbox to have the image resized to display on screen. This selection will stretch or shrink the image display without affecting the original file.
Auto-Show Image	If your images are stored on the same computer you are using or they are on a computer on the same Local Area Network, you will probably want to put a check mark in this box so the product image is displayed whenever you open the stock item record. However, if your images are stored on the Internet or on a different computer that is slow to access, you should remove the check mark so the stock item form is not slow to load each time. In this case, EVE will show a link in place of the image and you can click the link to display the image.
Video	If you have linked Videos and/or images to Stock Items, you can play/view those that are associated with the selected Stock Item. For instance, you could create a video of last year's trip to Aruba and link it to a Stock Item relating to this year's trip. Alternatively, if you have a promotional video created by the manufacturer of a Stock Item you could play it for the customer as part of your sales pitch.

Suppliers

Use the Suppliers tab to identify all of the Suppliers from which you can purchase this Stock Item. One of the Suppliers will be identified as the 'preferred' supplier.

Supplier	Supplier Stock #	PO Description	Preferred?	Purchase Tax Band
SeaLife	SL155	DC 500 Digital Pro Set	<input checked="" type="checkbox"/>	No Tax
Blandfords	SL155	DC 500 Digital Pro Set	<input type="checkbox"/>	No Tax

☒ Keep synchronized with General tab information

Supplier	The Supplier will default to be the same as the Manufacturer you selected on the General tab. If you purchase the item from more than one supplier, you can select additional Suppliers from the pre-defined list. Use the Add button to add Suppliers. Highlight a Supplier and click the Remove button to remove Suppliers.
Supplier Stock #	Enter the Supplier Stock #. This will usually be the same as the Stock # on the General tab. It is recommended you use unique values for the Stock # throughout EVE, while the Supplier Stock # is not necessarily unique. Thus, two suppliers might use 'A1' as their identifier for two completely different items. You could enter 'A1' for each as the Supplier Stock # but you may want to use a unique Stock # for each.
Purchase Order Description	Enter the description of the Stock Item that will appear on Purchase Orders. This will usually be the same as the Description on the General tab, but you can type a different description to help identify the item to the supplier, if you wish.
Preferred	If this is the preferred supplier (often the supplier with the best pricing or easiest shipping), check the <i>Preferred</i> checkbox. The preferred supplier is used in some places in EVE to calculate the cost price for an item (as the cost price may vary between suppliers).
Purchase Tax Band	Pick the Purchase Tax Band that will be used to calculate the tax on purchases of the Stock Item (i.e. when you purchase items from your suppliers). This may not be applicable in all locations - i.e. you may need to choose No Tax here.

If there is a check mark in the 'Keep synchronized with General tab information' box then, every time you make a change to the Stock Item Description or Stock # values on the General tab, the PO Description and Supplier Stock # values will be updated to match for each row in the Suppliers grid.

Stores

Check the Stores that have access to this Stock Item. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

Prices

Enter both your retail pricing structure for this Stock Item and your purchasing/cost price structure. You can set a retail pricing structure for each Cost Center at which this Stock Item is available. For example, if you run both a store and a mail order company you could set up a Cost Center for each and, if you wish, have a different price dependant on which company you sell the item through. You may have different retail prices for different

Customer Types. For example, you may sell a particular item to club members for a different price than for regular customers.

You may also have multiple cost pricing levels for each supplier of a particular Stock Item. For instance, if the supplier considers you a valued customer based e.g. on the number of items you purchased from them last year, you may benefit from their Level 2 pricing scheme rather than their Level 1 pricing scheme. You can import all cost price levels into EVE and then indicate, for each Supplier, which pricing level applies.

The screenshot shows a software window titled "Stock Item: Akona Evolution". It has several tabs: General, Suppliers, Stores, Prices, Stock Levels, Serial Nos, Packages, Links, Documents, and Chart. The "Prices" tab is active, showing two sub-tabs: "Retail Prices" and "Cost Prices".

Retail Prices: This section includes a "Sales Tax" dropdown set to "Standard Rate". Below it is a table with columns: Price Type, Unit Price, Inc. Tax, and Status.

Price Type	Unit Price	Inc. Tax	Status
.Retail	\$299.00	\$313.95	Price Set
Club Member	\$200.00	\$209.93	Price Set
Dive Master	\$299.00	\$313.95	Use Retail
Employee	\$299.00	\$313.95	Use Retail
Instructor	\$284.05	\$298.25	5% Off

At the bottom of the Retail Prices section is a "Pricing Method" dropdown set to "OneOff".

Cost Prices: This section includes a "Cost Price Level" dropdown set to "1" and a "Purchase Tax" dropdown set to "No Tax". Below these is a table with columns: Cost Price, Inc. Tax, and Level.

Cost Price	Inc. Tax	Level
* \$84.05	\$84.05	1

At the bottom of the Cost Prices section are two text boxes labeled "Akona" and "Sherwood".

The bottom of the window features a toolbar with icons for navigation and a set of three buttons: "New", "Save", and "Close".

Retail Prices

Enter your Retail Prices on the left hand side of the form. There will be a tab displayed for each Cost Center you have created. You will need to set Retail Prices for each Cost Center (in the above example there are 2 Cost Centers called Divercity Dive Emporium and Divercity Travel). You will only be able to enter prices for Stock Items at a Cost Center if the item's Stock Type is marked as applicable at the Cost Center. If the Cost Center has not been marked applicable in Stock Types you will receive a message to Open the Stock Type Form and add the Cost Center.

If this item is a package, you may enter the price for the entire package here (and then discount all items in the package by 100%) or you may choose to discount each individual line item on the Packages tab. For more information, see the Packages tab section below.

Sales Tax	The tax band used to calculate the tax on sales of the Stock Item is shown. It is not editable here. It is set to the value defined for the Stock <i>Type</i> of the item, the assumption being that if one e.g. BCD is subject to 10% sales tax then all BCDs will be.
Price Type	A price type row will be added to the grid for each Customer Type you have created in Customer Types that is marked as Discountable? In addition, a price type of .Retail will be displayed. This is the standard price used on an invoice when no Customer Type is identified. You can type a price into either the Unit Price (i.e. before Tax) column or the Inc Tax column on each of the Price Type rows. If you don't enter a value for a particular Price Type, the .Retail. price will be assumed.
Unit Price	You can enter the Retail Price either before (Unit Price) or after (Inc. Tax) tax. As you type one value, EVE calculates the other using the Sales Tax Band defined for the Stock Type.
Incl. Tax	

Status	<p>In advance, you may have indicated on the Customer Types form (See Section 4.4.10.Customer Types) that, for example, Instructors will get a 5% discount on trips. In that case, when you view a Trip stock item, the Status column on the Club Member row will indicate the discount band in effect and the Unit Price and the Unit Price Including Tax will be adjusted accordingly.</p> <p>If you manually change the Unit Price or Unit Price Including Tax by typing a value into that column, the Status will change to “Price Set”.</p> <p>Otherwise the Status will display as Use Retail indicating no discount is applicable for the customer type.</p>
Deposit Pre Tax	<p>The Deposit fields only are applicable to courses and trips. You can enter a deposit value before (Deposit Pre Tax) or after (Deposit Inc. Tax) tax. The other value will default based on the tax band for this Stock Type.</p> <p>Deposit will be used to default the amount being paid when Selling Courses (See Section 6.1.4.Selling Courses) or Selling Trips. You can decide which deposit amount to set as the <i>Default</i> when Setting Course Options (See Section 4.3.5.Courses Options) and Setting Trip Options (See Section 4.3.6.Trips Options).</p>
Deposit Inc. Tax	
Pricing Method	<p>The Pricing Method pick-list is only applicable when the item’s Stock Type is “Commissions”. The pick-list contains the following values: One-Off, Per Day, Per Hour, Per Minute, etc. You can setup commission stock items and then link them to Task Types. The price on the commission stock item determines how much pay is due to an employee performing a particular task. The pricing method determines if they’ll be paid an amount regardless of how long the task takes (choose a pricing method of “One-Off”) or whether the duration of the task factors into the amount. E.g. the commission stock item on a Task Type called “Fill Cylinders” may have a price defined of \$2 and may have a pricing method of “Per minute”. If an employee takes 10 minutes to fill the cylinders they’ll be paid \$20.</p>

Cost Prices

Enter your Cost Prices on the right hand side of the form. There will be a tab displayed for each Store on the system and for each Supplier you have identified on the Suppliers tab. You will need to set Cost Prices for each Supplier. Unless you have specified otherwise, the same Cost Prices will apply to all Stores. If you need to change this behavior (i.e. if a different Cost Price needs to be set for the item at different stores) please contact EVE Diving.

Cost Price Level	<p>The Cost Price Level will default based on the level you set in Suppliers (see section 5.1.7). It defines the cost basis for any purchases of this Stock Item from this Supplier. E.g. the supplier may have different prices based on the level you are on with them - perhaps based on the value of last year’s purchases.</p> <p>If you negotiate a level change with your supplier, you can change the price level on Suppliers. Your cost basis on all future purchases from the supplier will automatically be based on the new pricing level.</p> <p>All pricing levels can be imported from the supplier’s product list (see section 3.2).</p>
Purchase Tax	<p>The Purchase Tax shown will be that value you chose for the Supplier on the Suppliers tab. It is used to calculate the cost price including tax figure.</p>
Cost Price	<p>Some Suppliers will offer multiple pricing levels based on your purchase</p>

Incl. Tax	amounts or commitment levels. You can enter (or import from a product list) the cost prices for various levels before (Cost Price) or after (Inc. Tax). The other value will default based on the Purchase Tax for this Supplier.
Level	

Stock Levels

Use Stock Levels to track your inventory levels and inventory cost basis. There will be a tab for each Store so you can maintain Store specific Stock Levels. The data within the Stock Levels tab will be automatically populated as you receive Deliveries in the Purchases Module. You can manually enter or adjust Stock Item levels as you populate EVE for the first time or as you complete your periodic inventory count (see section 18.2.6).

Stock Item: Akona Evolution

General

Suppliers

Stores

Prices

Stock Levels

Serial Nos

Packages

Links

Documents

Chart

Inventory Tracking Method

FIFO (First In First Out)

☒

Maintain Stock Levels?

☒

Can be added to Purchase Orders?

Diversity

	Date Received	PO #	Delivery #	Cost Price	Qty Received	Qty Unsold
▶	08/04/2006 8:20 PM			176	4	4
	08/04/2006 8:24 PM	1	1	155	1	1
	08/04/2006 8:25 PM	1	2	155	1	1
	08/04/2006 8:35 PM	2	3	125	1	1

Number on Order*

0

Peak Season

Slow Season

Min. Level*

0

Ideal Level*

0

Location in Store

Location in Store Room

☐

Include Historic Entries?

Number in Stock*

7

◀

▶

🏠

🔧

★

✖

🖨

📁

New

Save

Close

Inventory Tracking Method	The <i>Inventory Tracking Method</i> you selected when Setting Purchases Options (See Section 4.3.4.Inventory Options). You have the choice of using FIFO (First In, First Out) or LIFO (Last In, First Out) inventory management. If you use FIFO, the Stock Item with the oldest date will be sold first. If you use LIFO, the Stock Item with the newest date will be sold first.
Maintain Stock Levels	Check the checkbox if you want EVE to automatically update stock levels for the item as units are sold or received. Most physical items require a check mark here as you want to track the physical stock level held in your store. Some Stock Items such as courses, gift certificates, trips require no stock level maintenance, as you do not need to track the inventory level.
Can Be Added To Purchase Orders	If you want to be able to add this item to a Purchase Order, check this checkbox.
Date Received	<p>Each row in the grid indicates a Delivery of the item, a Transfer of the item from another store or a manual override of stock levels on the item; i.e. it indicates a change in stock level.</p> <p>If the row represents a Delivery or Transfer, the Date Received is the date and time the items on the delivery were received into inventory.</p> <p>If the row represents a manual override of stock levels, the Date Received is the date and time you made the adjustment. EVE will use this date stamp to determine which items should be sold first based on the Inventory Tracking Method you have selected.</p>

Purchase Order #	If the row represents item(s) that were delivered on a Purchase Order, the Purchase Order number is displayed here. If you manually entered the item, or the row represents a Transfer from another store, this field is blank.
Delivery #	If the row represents item(s) that were delivered on a Purchased Order, the Delivery number is displayed here. If you manually entered the item, or the row represents a Transfer from another store, this field is blank.
Transfer #	If the row represents item(s) that were received into inventory as a result of a Transfer from another store, the Transfer number is displayed here. Otherwise this field is blank.
Cost Price	<p>The cost price of the Stock Item at the time the stock level was updated.</p> <p>If you manually enter an item or the stock level update was due to a Transfer from another store, the Cost Price is based on the Level and Cost Price you set on the Prices tab.</p> <p>If this item was received using the Purchases Module, the Cost Price is the Cost Price identified on the Delivery.</p> <p>This column is only displayed if the user who is logged-on has the necessary privilege.</p>
Quantity Received	This is the Quantity Received on the Delivery/Transfer/manual update
Quantity Unsold	EVE will choose which specific inventory item of this Stock Item to sell each time you add this Stock Item to an invoice based on the Inventory Tracking Method you identified. Quantity Unsold will tell you the remaining items you have from each individual delivery.
Include Historic Entries?	Use the <i>Include Historic Entries</i> checkbox to indicate if you want EVE to display historical stock levels and cost prices even if the stock level is now zero on that row. If this box is unchecked, only rows where the stock level is non-zero will be displayed.
Number In Stock	<p>The Number in Stock is the sum of the Quantity Unsold - i.e. the total number of units you have in stock of the stock item. You can manually adjust stock levels using the Up or Down button to increase or decrease numbers. A new Date Received line will automatically be created.</p> <p>If you manually adjust the Number in Stock on an existing Stock Item, EVE will prompt you for a reason for the change - e.g. "2 items stolen". You can view the reasons for inventory changes by double clicking on the grey column on the left of the Stock Level grid. Along with the reason, you'll see who was logged in to EVE and the date/time of the change.</p>
Number On Order	The number of units of the Stock Item that are on order awaiting delivery across all Purchase Orders. EVE automatically updates this figure when you create a Purchase Order in the Purchases Module.
Min Level Peak Season	Enter the Minimum Number of units of the item that you want in stock during your busy season. You can define when your busy season starts and ends on the Store form - see section 4.4.32
Min Level Slow Season	Enter the Minimum Number of units of the item that you want in stock during your slow season. This field is used in the same way as the Ideal Level Peak Season but will be used if you use the Top Up function during the slow season. You can define when your slow season starts and ends on the Store form - see section 4.4.32
Ideal Level Peak	Enter the Ideal Number of units of the item that you want in stock during your

Season	busy season. When using the Top-Up feature to auto create a Purchase Order, EVE will examine this figure and will add a number of units to the PO that will increase stock levels from their present level to this Ideal level.
Ideal Level Slow Season	The Ideal Number of units of the item that you want in stock during your slow season.
Location In Store	Select the Location of the Stock Item on the show room floor. When a sale is made, EVE writes this value to the invoice. Later, you can perform searches based on the Inventory location to determine which areas of the store are most profitable when selling which types of items.
Location In Store Room	Select the Location of the Stock Item in your storage area or warehouse. You may find this useful later when you need to re-stock the store front.

Serial Numbers

Use Serial Numbers to enter the serial numbers of individual units of the currently selected Stock Item. You may find this useful for insurance purposes or for warranty purposes.

Serial Numbers Are Applicable For This Stock Item

If you want to record serial numbers, check the checkbox. You can then add serial numbers for existing units in stock by clicking the **Add** button. Usually though, you will add Serial numbers when receiving items on a Purchase Order Delivery (See Section 8.1.3.Deliveries/Back Orders).

When Selling Stock Items (See Section 6.1.1.Selling Stock Items), the list of pre-defined numbers is shown in the Sales Module so you can choose the appropriate one being sold. When the Stock Item is added to the shopping basket in the Sales Module you will be prompted to select one of the serial numbers from your pre-defined list. That number will be saved with the invoice.

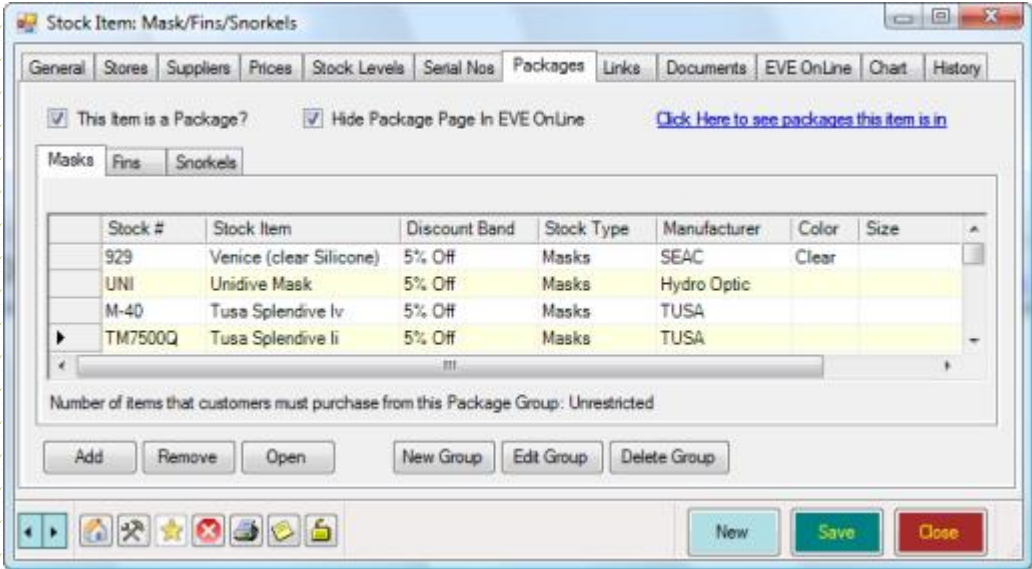
To delete an existing number, select it in the list and click the **Delete** button.

Packages

If certain Stock Items are always sold together, you can group them together into a package. When the package is added to the shopping basket in the Sales Module, the package is expanded and the constituent parts are

added to the basket as well. For instance, you may sell mask, fins, snorkel sets. You can mark a Stock Item as being a package and add other Stock Items to that package. When the package is sold in the Sales Module, EVE shows a list of all items in the package so you can pick which ones you want to add to the shopping basket along with the package item itself. You could therefore add all colors and sizes of fins to a package and then pick the appropriate one the customer wants at the point of sale.

You can create Groups within the package. E.g. in the example above, you could create 3 groups called 'Masks', 'Fins' and 'Snorkels'. Add all the masks to the Masks group, all the fins to the Fins group, all the snorkels to the Snorkels group. You can indicate how many items can be added from each group to the shopping basket for the package to be valid - e.g. in the above example, you would want each group to have 1 item added from it. Obviously the package price is not valid if 3 masks are added and no snorkel.



This Item Is a Package?	Put a tick in the 'This Item is a Package' box to indicate this stock item is a Package.
Show Package Page in EVE OnLine	<p>This check box is only appropriate if you use EVE OnLine - i.e. the eCommerce companion product to EVE. Add a tick in the box if you want the package page to be shown in EVE Online - leave it unticked if you do not want the page to be shown - i.e. when your customers click Add to Cart you want all package items to be automatically added to the cart. You might want to do this e.g. with OW courses where the PIC and CrewPak are included in the price of the course and you want them to be added to the shopping cart automatically.</p> <p>If you want the package page to be shown, leave the box unchecked. Your customers will then be able to choose which item(s) they want from the package.</p>

Use the **Add** button to add other Stock Items to the package. The Stock Item Search box will be displayed so you find the item(s) to add. Highlight an item and click the **Remove** button to remove the Stock Item from the package. Highlight an item in the grid and click **Open** to view that stock item.

To create a new Package Group, click the **New Group** button.

Give a name for the Package Group and enter the Number of Items that must be added at the point of sale from this group for the package to be valid. In most cases this will be 1.

You can use packages to define add-on items. For instance, you could mark all Mask Stock Items as being packages and then add a mask de-fog Stock Item as a package item to each mask package. When you sell a mask, EVE will show the package items list, so prompting the sales person to offer the mask de-fog to the customer. In this case you could sell the mask at full price and you could give a small (or zero) discount on the mask de-fog.

You can nest packages - i.e. add a package to another package. In this way you could set up a mask package to facilitate add-on sales of mask de-fog and add the mask package to a mask/fins/snorkel package. If you wanted, you could add the mask/fins/snorkel package to another package, and so on.

Stock #	The Stock # of the item in the package is listed.
Stock Item	The Stock Item Description is listed.
Discount Band	<p>Enter the discount (if any) that applies to the item in the package. A list of Discount Bands is shown for you to select from.</p> <p>This discount will apply to the Stock Item only when the package is sold in the Sales Module. If the item is sold outside of the package, the discount band here has no effect.</p> <p>The discounts only apply when the item is sold as part of this current package. If you add the same item to a different package, you can choose a different discount.</p>
Stock Type	The Stock Type of the item is listed.
Manufacturer	The Manufacturer of the item is listed.
Checked?	Use the <i>Checked?</i> checkbox to identify if you want the item to be chosen (i.e. selected) by default when you sell the package. For example, if you are setting up a Course as a package which always includes the course material, you would check the <i>Checked?</i> checkbox. If you are setting up a mask package that has mask defog as an optional add on, you would not select the <i>Checked?</i> checkbox as there is a good chance the customer will not want it.

You can price packages in one of two ways:

- ❖ If the sum of the items in the package is \$100 you could give a discount to people purchasing the package as a whole, by setting a retail price on the package Stock Item of \$90. You could then give all items in the package a 100% discount when sold as part of the package. The total price for the package and all its constituent parts will then be \$90.
- ❖ You could set the retail price of the package Stock Item to be \$0 and then give a discount on each constituent item in the package when sold as part of the package. For example, item one in the package might have a 10% discount on its standard retail price, item two might have a 5% discount and item 3 might have a 15% discount.

Method 2 is recommended, as otherwise, profits on sales of package items will appear skewed when you run your end of year reports as the package items will appear to have been sold for 0 dollars (since they were discounted by 100%).

If you wish, you can combine methods one and two, i.e. you can give a retail price on the package Stock Item and also apply a discount on all constituent parts.

At the top right of the form is a link that reads 'Click Here to see Packages this item is in'. Click it to see a list of packages (if any) that the current stock item is in.

Links

Courses, Trips (both Vacation and Day Trips), Resort Reservations and Club Memberships all require special processing in the Sales Module. Use the Links tab to instruct EVE to initiate the processing when the Stock Item is sold.

Stock Item: Openwater Diver

General Details Stores Suppliers Prices Stock Levels Serial Nos Packages **Links** Documents Chart

Special Handling: this Stock Item is used to sell: Courses

Courses

☒ Use Rules
When a new Course is created, it will be automatically linked to this Stock Item if it matches the criteria below:

Course Type: Openwater Diver

Start Day

☒ Monday ☒ Friday
☒ Tuesday ☒ Saturday
☒ Wednesday ☒ Sunday
☒ Thursday

Start Date Between

1 January
31 December

Linked Courses

Course #	Course Type	Start Date	End Date
OW 12/3/2008	Openwater Diver	12/3/2008	12/13/2008
OW 12/17/2008	Openwater Diver	12/17/2008	12/27/2008
OW 11/19/2008	Openwater Diver	11/19/2008	11/29/2008
OW 11/5/2008	Openwater Diver	11/5/2008	11/8/2008
OW 12/16/2008	Openwater Diver	12/16/2008	12/16/2008
OW 12/24/2008	Openwater Diver	12/24/2008	12/24/2008
OW 12/23/2008	Openwater Diver	12/23/2008	12/23/2008
OW 12/7/2008	Openwater Diver	12/7/2008	12/7/2008
OW 12/11/2008	Openwater Diver	12/11/2008	12/11/2008

Add... Remove Open... ☐ Include Complete?

New Save Close

This Stock Item Is Used To Sell Courses

If the Stock Item is to be used to sell courses, select 'Courses' in the pick list. Then click on the Add button in the Linked Courses section to add course dates

	<p>that can be sold using the stock item.</p> <p>If you want the stock item to be used to sell other courses in future (i.e. that have yet to be created), put a tick in the 'Use Rules' checkbox. You can then use the controls in the left section to define a set of rules that new courses must match before they can be sold using this stock item. In the graphic above, all new Open Water courses will be automatically linked to the stock item as soon as they are created regardless of the day of the week they start and regardless of the month of the year they start. If you charge a different amount for OW courses starting during the week than for those at the weekend, you can create 2 stock items. On the first, make sure the Monday -> Friday boxes are checked. On the second, make sure the Saturday and Sunday boxes are checked. All new OW courses will be automatically linked to either the weekday stock item or the weekend stock item depending on their start day.</p> <p>Similarly, you can create multiple stock items to represent the prices of OW courses that take place in your slow season as opposed to those in the peak season. To do that, choose the appropriate Start Date range.</p> <p>When the Stock Item is added to the shopping basket in the Sales Module, the Booking Wizard is displayed (see section 6.1.4) so you can enroll the customer on a course date.</p> <p>Note: the Rules section and the Linked Courses section are independent. I.e. when the stock item is added to the shopping basket, all linked course dates will be presented to the sales clerk regardless of whether they match the rules or not. The Rules are only used as a means to automatically add new courses to the appropriate stock item by EVE when courses are created.</p>
This Stock Item Is Used To Sell Trips	<p>If the Stock Item is to be used to sell trips (i.e. vacations) or day trips (i.e. charters), choose Trips or Day Trips in the pick list. Then click on the Add button in the Linked Trips section to add trips that can be sold using the stock item.</p> <p>If you want the stock item to be used to sell other trips/charters in future, put a tick in the 'Use Rules' checkbox. You can then use the controls in the left section to define a set of rules that new courses must match before they can be sold using this stock item. If you charge a different amount for e.g. charters during the week than for those at the weekend, you can create 2 stock items. On the first, make sure the Monday -> Friday boxes are checked. On the second, make sure the Saturday and Sunday boxes are checked. All new charters will be automatically linked to either the weekday stock item or the weekend stock item depending on their start day.</p> <p>Similarly, you can create multiple stock items to represent the prices of trips/charters that take place in your slow season as opposed to those in the peak season. To do that, choose the appropriate start date range.</p> <p>When the Stock Item is added to the shopping basket in the Sales Module, the Booking Wizard is displayed (see section 6.1.5) so you can enroll the customer on a trip/charter.</p> <p>Note: the Rules section and the Linked Trips section are independent. I.e. when the stock item is added to the shopping basket, all linked trips will be presented to the sales clerk regardless of whether they match the rules or not. The Rules are only used as a means to automatically add new trips to the appropriate stock item by EVE when trips are created. You can associate your trip with a specific boat, a specific destination, a specific trip or a combination of these factors.</p>
Vacations or Day Trips	
Boat	
Destination	
Trip	
This Stock Item Is Used To Book Rooms	<p>If the Stock Item is to be used to sell Resort Reservations/Room Bookings, choose Resort Reservations in the pick list and choose the Hotel and Room Type</p>

Hotel	(e.g. Single, Twin, Double, etc.) to which the Stock Item relates. When the Stock Item is added to the shopping basket in the Sales Module, the Confirm Resort Reservation form is displayed so you can add the customer to a resort reservation of the type specified.
Room Type	
This Stock Item Is Used To Sell Club Memberships	If the Stock Item is to be used to sell Club Memberships, choose Clubs in the pick list and choose which club and membership type the stock item will be used to sell. For example, if you sell a Gold and a Silver membership type, you could set up a stock item for each with a different price for each.
Club	When the stock item is added to the shopping basket in the Sales module, the Confirm Club Membership form is displayed.
M/Ship Type	

Documents

Use the Documents tab to allocate documents to a Stock Item. You can choose to print or email these Documents when the Stock Item is sold in the Sales Module. For instance, you could link a Release document to your Trips stock items for the customer to sign, or you could link a document showing directions to the open water dive site to your courses stock items. Note: there is an equivalent tab on the Stock Types form where you can link documents to a Stock Type. You should use that tab instead of this one if the documents relate to all items of the stock type.

The screenshot shows a software window titled "Stock Item: D4r Bulb/uk400r". It has a tabbed interface with tabs for General, Suppliers, Stores, Prices, Stock Levels, Serial Nos, Packages, Links, Documents (selected), and Chart. The Documents tab contains a text area with the following list:

- Boat Travel and Scuba Diving Release
- Have-Need Sheet (Open Water)
- Liability and Express Assumption of Risk

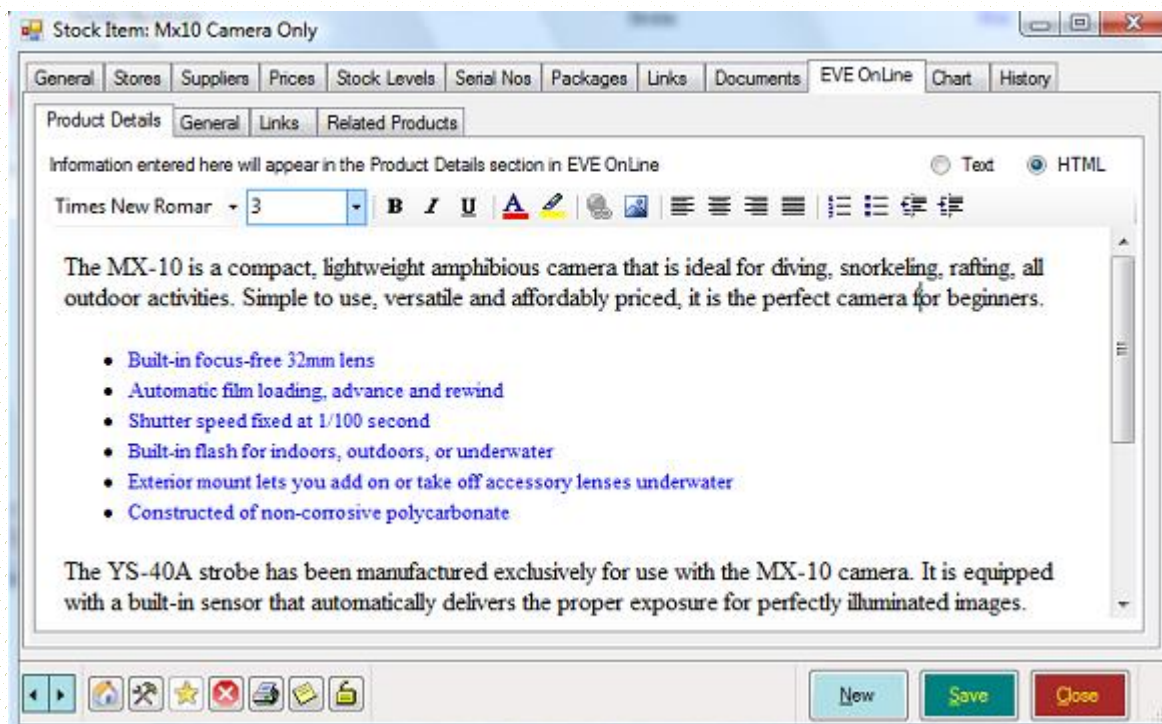
Below the list are three buttons: "Add", "Remove", and "Open". At the bottom of the window is a toolbar with icons for navigation and a set of three buttons: "New", "Save", and "Close".

To add items from the allocated document list, click the **Add** button and select the document(s). To remove items, highlight the document and click the **Remove** button.

EVE OnLine

The EVE OnLine tab is where you enter information specific to EVE OnLine - i.e. the e-Commerce companion product to EVE. If you have purchased EVE OnLine, your customers can view and buy your EVE products on the web. There are 4 tabs on the EVE OnLine page: Product Details, General, Links and Related Products

Product Details



Product Details	Enter an extended product description. This will appear on the Details page when your customers click on the item in EVE OnLine. You can use the HTML view to add formatting to the text - e.g. changing colors and fonts, adding hyperlinks to other web pages, adding graphics, etc. Or you use the Text view if you want to copy some existing text from another website. Note: if you add graphics here, you must make sure they are accessible from the Internet - e.g. it is OK to use a graphic located on an internet server - e.g. http://shop.emeraldislanddivers.com/Share/StoreFiles/ProductImages/SeaSea/dx1g.jpg but it is not OK to use a graphic on your C: drive. A graphic on your C: drive will be visible by you but not by anyone else using EVE OnLine as your C: drive is not accessible on-line.
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General

Display Order	By default, items in EVE OnLine will be displayed alphabetically. However, in some cases you may want to choose your own display order - e.g. on the Courses page in EVE OnLine you may want Open Water, Advanced Open Water and Rescue courses to be shown at the top. Items with a lower Display Order will be displayed first.
Shipping Period	This option is only applicable if the Stock Item is used as a shipping option in EVE OnLine - i.e. if the Stock Item has the 'Shipping' Stock Type. It indicates the number of days to allow for shipping. Online customers will see this when they purchase goods.
Weight	This indicates (in whichever units you choose), the weight of the stock item. It will be used when calculating the shipping cost for an online order. Whichever units you choose to use for the weight must match the units you use when setting up shipping charges on the Stores form.
Shipping Required?	Some items may require shipping when they're bought on-line - e.g. a mask or a regulator, while others do not - e.g. a course or trip. If one or items purchased on-line have Shipping Required, EVE OnLine will show a page during checkout

	<p>where the user can choose shipping method (including pickup from store) and specify shipping address, etc.</p> <p>The Shipping Required? checkbox is also used if the Stock Item is used as a shipping option in EVE OnLine - i.e. if the Stock Item has the 'Shipping' Stock Type. For most shipping method stock items (e.g. FedEx, UPS, DHL, etc) you will put a tick in the Shipping Required box here. However, for shipping methods such as 'Pick Up From Store' you should leave it un-ticked. EVE OnLine will then calculate whether tax is due using the store's address rather than the shipping address supplied by the customer.</p>
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Links

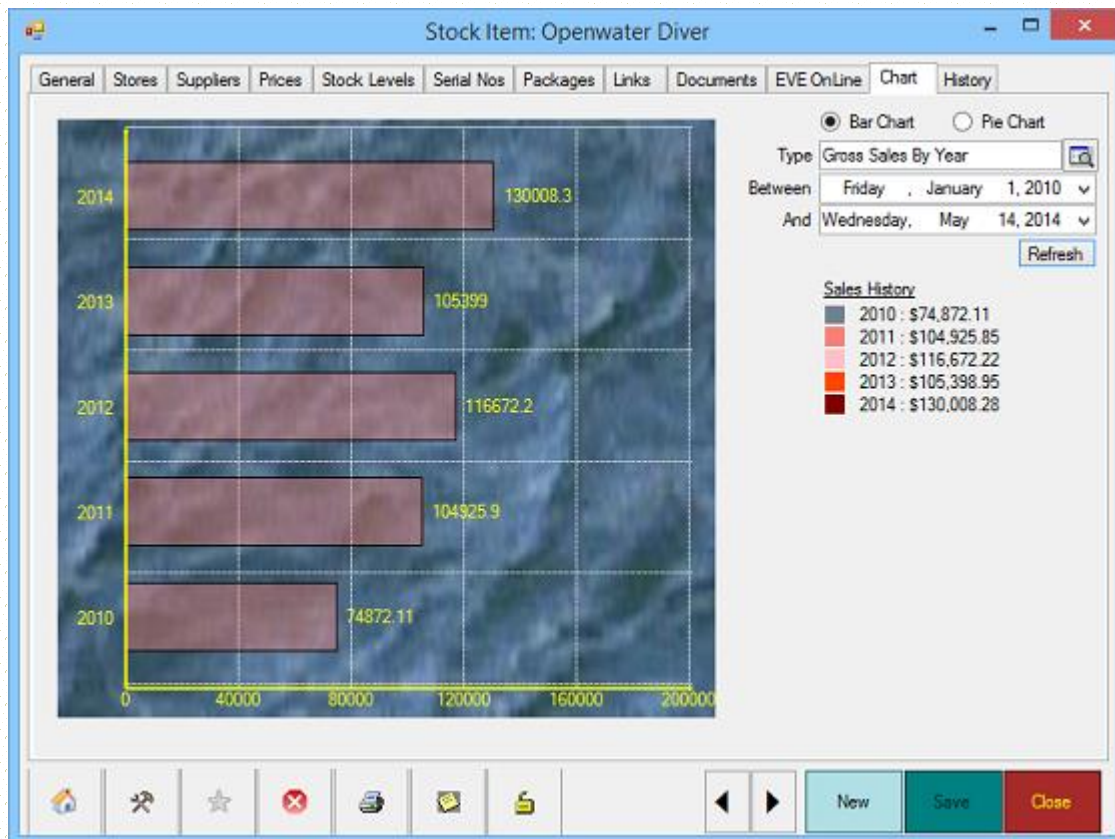
Links	<p>In EVE, if you stock the same item in different colors and sizes, you may wish to create one stock item record for each color and size - e.g. if the same item comes in 3 sizes and 2 colors, you would create 6 stock items. This works fine in EVE, but in EVE OnLine most stores prefer to show only one item and allow the customer to choose the color and size. The EVE OnLine Links section lets you have the best of both worlds. You can create the 6 stock item records and then link them together here to a 'parent' item. The parent is the only one that is shown in EVE OnLine, and all linked 'child' items are made available in color and size picklists. Click the Add button to link other stock items to the one on display. Highlight one or more items in the grid and click the Remove button to unlink those items from the parent. Highlight one or more items in the grid and click the Open button to open those stock items</p>
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Related Products

Related Products	<p>In EVE Online, you can choose to show items that are related to the one being viewed as thumbnails at the bottom of the page.</p> <p>Choose 'There are no Related Products' if you don't want any related products to be displayed.</p> <p>Choose 'Let EVE OnLine determine Related Products based on Stock Type and Manufacturer' if you want EVE OnLine to lookup items that have the same stock type and manufacturer as the item being viewed and show those as related products.</p> <p>Choose 'The following products are related' if you want to choose your own stock items to be shown as related products. If you choose this option, make sure that the items you choose are applicable to EVE OnLine.</p>
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Chart

The Chart tab gives you a quick view of the sales associated with this particular Stock Item in different time frames either as a bar chart or a pie chart.



You can choose to display the chart for a number of Report Types including

- ❖ Gross Sales by Year / Month / Day / Hour
- ❖ Net Sales by Year / Month / Day / Hour
- ❖ Profit by Year / Month / Day / Hour
- ❖ Qty Sold by Year / Month / Day / Hour

History

If you have made sales of the Stock Item, you can use this tab to see details of each sale - i.e. quantity sold, price it was sold at, date of sale, etc.

5.1.6 Stock Types

In this section enter details of Stock Types (i.e. Categories) that you sell in your shop (for example, Wetsuit, Snorkel, etc.).

EVE uses some Stock Types internally for specific purposes. You can modify the attributes of these Stock Types if you wish. For example, you may need to change the Tax Band on some of them, depending on the tax laws in your country. You can also change the Description (for example, you could change Equipment Servicing to Work Orders) but be careful not to alter the meaning, (for example, do not change Equipment Servicing to Wetsuits). EVE uses the ID value to determine what functionality is associated with some Stock Types (for example, if the Stock Type with ID 1 is used in the Sales Module, EVE shows Equipment Rental Bookings). Here is a list of those Stock Types that have a special purpose:

1.Equipment Rental	When this item is selected in the Stock Type pop up list box in the Sales Module, all unpaid Rental Bookings for the selected customer are shown so they can be added to an invoice. In addition a New Rental Booking option is
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	shown so you can create a new rental booking directly from the invoice.
2. Gift Certificate	When a Stock Item that has Gift Certificate as its Stock Type is added to an invoice in the Sales Module, the Gift Certificate form is shown so details of the Gift Certificate can be entered (for example, amount, recipient, etc.). You can define multiple Stock Items with the Gift Certificate Stock Type if you want to create different Denominations of certificate (for example, \$50, \$100, etc.)
3. Courses	When a Stock Item that has Courses as its Stock Type is added to an invoice in the Sales Module, the Course Selection form is shown so you can add the customer to a course of the type being purchased.
4. Late Return Penalty	When rental gear is checked in after the due date/time and after the <i>Grace Period</i> you selected when Setting Rental Options (See Section 4.3.7. Rentals Options), a late penalty may be applied. This Stock Type is used to process the Late Return Penalty.
5. Equipment Servicing	When this item is selected in the Stock Type pop up list box in the Sales Module, all unpaid Service Bookings for the selected customer are shown so they can be added to an invoice. In addition a New Service Booking option is available so you can create a new service booking directly from the invoice.
6. Labor	When an Equipment Service Booking that contains a Labor charge is added to an invoice in the Sales Module, EVE adds a labor line item automatically. The line item has a Stock Type of Labor.
7. Handling	When an Equipment Service Booking that contains a Handling charge is added to an invoice in the Sales Module, EVE adds a handling line item automatically. The line item has a Stock Type of Handling.
8. Instruction	In the Courses Module you can instruct EVE to calculate the amount instructors will be paid for running a particular course. The tax that is chargeable on the amount instructors are paid when Creating a New Course (See Section 9.1.1. Creating a New Course) is based on the tax band you define for the Instruction Stock Type.
10. Expenses	You may choose to track the expenses associated with courses and trips. For example, the cost of pool rental or mail outs. This Stock Item is used to create expenses that will be added in the Courses Module or Trips Module.
12. Trips	When a Stock Item that has Trips as its Stock Type is added to an invoice in the Sales Module, the Trip Selection form is shown so you can add the customer to the Trip being purchased.
13. Gift Cards	When a Stock Item that has Gift Card as its Stock Type is added to an invoice in the Sales Module, the Gift Card form is shown so details of the Gift Card can be entered (for example, amount, recipient, etc.). You can define multiple Stock Items using the Gift Card Stock Type if you want to create different Denominations of card (for example, \$50, \$100, etc.)
14. Rental Sell Off	If you want to sell off an item of rental equipment, you can convert it into a Stock Item using the New Stock Item option on the Equipment form. By default, the new stock item will have a stock type of Rental Sell Off

General

Stock Type	Enter a description for the Stock Type.
Profit Center	Pick the Profit Center that this Stock Type will contribute to from the pop up list box. Profit Centers allow you to group together Stock Types for reporting purposes.
For Sale	Check the <i>For Sale</i> checkbox if the Stock Type is one that you sell. Only those items marked For Sale will be available when Selling Stock Items (See Section 6.1.1.Selling Stock Items).
Cost Center	If you only have one Cost Center, pick it from the pick list. If you have more than one Cost Center, use the Add button to add Cost Centers at which this Stock Type is applicable. All Stock Items on an invoice must be associated with Stock Types that are applicable at the Cost Center identified on the invoice. Highlight a Cost Center and click the Remove button to delete it from the list.
Sales Tax Band	Pick the Sales Tax Band from the pop up list box. This is the tax band that is used when you sell items of this stock type to your customers. It is not used when you purchase items. You can override the tax band at invoice level if you are authorized.
Default Commission Rate For New Stock Items	Enter the rate at which Commission is earned by staff members for the sale of items of this Stock Type. As new Stock Items with this Stock Type are created they inherit this value by default, but you can override the value for individual Stock Items if you wish.
Apply To Existing Stock Items	Click this button to apply the commission rate you have set for the Stock Type to all existing Stock Items of that type. If you adjust commission rates at a later date, you can apply a universal change using this function or override the value for existing Stock Items that have this Stock Type.

Customer Required	Use the <i>Customer Required</i> checkbox to identify whether a customer name must be entered when items of this type are sold. For example, you may not require a customer name on the sale of sun screen, but you may require a customer name for anything requiring warranty/service work such as Regulators.
Room Booking Prompt	This is not currently used.
Gift Certificate Prompt	Check the Gift Certificate Prompt if you want the Gift Certificate form to be displayed when Stock Items with this Stock Type are added to the shopping basket on an invoice. Usually this will be reserved for only the “Gift Certificate” Stock Type.
Gift Card Prompt	Check the Gift Card Prompt if you want the Gift Card form to be displayed when Stock Items with this Stock Type are added to the shopping basket on an invoice. Usually this will be reserved for only the “Gift Card” Stock Type.
Allow Price Updates	When creating an invoice, the price of each item is set when it’s added to the shopping basket. Users that have the “Can Manually Override All Invoice Prices” privilege can override the price by typing a new value into the Unit Price, Price or Total columns. Users that have the “Can Manually Override Invoice Prices on items whose Stock Type has Allow Price Updates ticked” privilege can also override the price but only on line items that have a Stock Type where the “Allow Price Updates” box is ticked. In this way, you could allow staff members to override prices on e.g. dive charters but not on regulators.
Invoice Text	If you want certain text to always appear on invoices when you sell this Stock Type, type the text here. For example, for the Courses Stock Type you could enter ‘No Refunds after the course has started.’
For Rent	Check this checkbox if the Stock Type is one that you rent. Only those items that have the <i>For Rent</i> checkbox checked will be available when adding new Rental Equipment Items.
For Rental Profile	Check the checkbox if the Stock Type is one that you want available on the Rental Profile. Only those items that have the <i>For Rental Profile</i> checkbox checked will be available when adding items to Rental Profiles. You can create Rental Profiles for frequent customers to indicate the size they use for each type of equipment - for example, John Smith may require a Large BCD and Extra Large Wet Suit, etc.
For Service	Check the checkbox if the Stock Type is one that you want available on the Service Booking. Only those items that have the <i>For Service</i> checkbox checked will be available when adding items to Service Bookings. For example, you will want to add a check mark for Regulators and Air tanks but not for Fins, etc.
Service Period (Months)	If the Stock Type represents one that will be serviced, enter the period in months between services (for example, if you service regulators annually, enter 12 here).
Technician Activity	<p>You can use EVE to calculate the pay for service technicians based on the type of work completed. For instance, you could set up Regulator Service, Cylinder Service, VIP stock items, etc., add these to service bookings where appropriate and then, at the end of the week, use the EVE Technician reports to calculate for each technician, the quantity and type of work completed.</p> <p>Items will contribute to the Technician reports if they have a check in the Technician Activity box.</p>
Trip/Course	Check the checkbox if the Stock Type is one that you want to appear in the

Requirement	requirements list when a customer registers on a trip or course. When selling a trip/course, you can indicate the customer requirements for the trip/course - for example, a particular customer may require a wetsuit, regulator and computer. Only those stock types that have a check mark in the Trip/Course Requirement box will be shown on the Requirements form.
Show Cylinder Info	<p>Check the checkbox if the Stock Type represents a Cylinder. This will have 2 effects:</p> <p>1/ when you create new Equipment Items that have this Stock Type, a tab will become visible on the Equipment form called 'Cylinder Specific Information' where you can enter information about the cylinder's Material, Valve, etc.</p> <p>2/ when you add Equipment Items that have this Stock Type to a new Service Booking, a tab will become visible on the booking called 'Cylinder Specific Information' where you can enter information about e.g. the Internal/External Exam, Hydro, etc. carried out.</p>

Stores

Check the Stores that have access to this Stock Type. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

Rental Prices

Use the Rental Prices tab to enter information about the cost of renting items of this Stock Type. Note: there is an equivalent Rental Prices tab on the Equipment form. If you have entered prices for the Stock Type and for a particular item of that type, the item prices will override the stock type prices. Usually you will only enter prices at the stock type level since, for example, the price of renting all fins is likely to be the same.

Days	Price	Late Return Penalty Price
1	\$10.00	\$3.00
2	\$18.00	\$4.00
7	\$50.00	\$5.00
14	\$60.00	\$6.00
*		

Rental Price Wizard

New Save Close

Days	You can enter the rental prices to be charged for each Stock Type based on the number of days it is rented. For example, in the graphic above, air tanks will cost \$10 to rent for a day, \$18 for 2 days, \$50 for up to 7 days and \$60 for up to 14 days. Since there is no number of Days after 14, \$60 will be charged for any rental period over 14 days as well.
Price	
Late Return Penalty Price	Also, if the equipment is checked back in late, you will charge an additional \$3 if it is brought back up to 1 day late, \$4 if it is brought back between 1 and 2 days late, \$5 if it is brought back up to 7 days late and \$6 for 8 or more days late. Enter 0 in this column if you are not interested in charging late return fees.

Rental Price Wizard

Click this to show the form below. It lets you quickly create rental prices to fill the grid above provided you base your prices on a simple sliding scale. In the example below it will generate a price of \$4 for a rental lasting one day and then apply a 50% discount for each following day. i.e. the price for 2 days is: $4 + 4 \times 50 / 10 = \$6$, etc.

The screenshot shows the 'Rental Price Wizard' dialog box with the following fields and values:

- Price for 1 day Rental: 4
- Percentage Change Per Day: 50
- Number of days to set prices for: 10

Buttons: Preview, OK, Cancel.

A red arrow points from the 'Preview' button to a separate window titled 'EVE' which displays the generated rental prices:

Days	Price
1 day(s)	\$4.00
2 day(s)	\$6.00
3 day(s)	\$7.00
4 day(s)	\$7.50
5 day(s)	\$7.75
6 day(s)	\$7.87
7 day(s)	\$7.93
8 day(s)	\$7.96
9 day(s)	\$7.98
10 day(s)	\$7.99

Documents

Use the Documents tab to allocate Documents to Stock Types. You can also add Documents to individual Stock Items. When an item is sold in the Sales Module, EVE checks whether Documents are linked either to the item itself or to its Stock Type and allows you to print or email any document that it finds. For example, for the Trips stock type, you may want to link Release and Waiver documents for the customer to sign.

The screenshot shows the 'Stock Type: Courses' dialog box with the 'Documents' tab selected. The list of documents includes:

- Liability and Express Assumption of Risk
- Student Size Chart
- Instructor Names for Liability Release

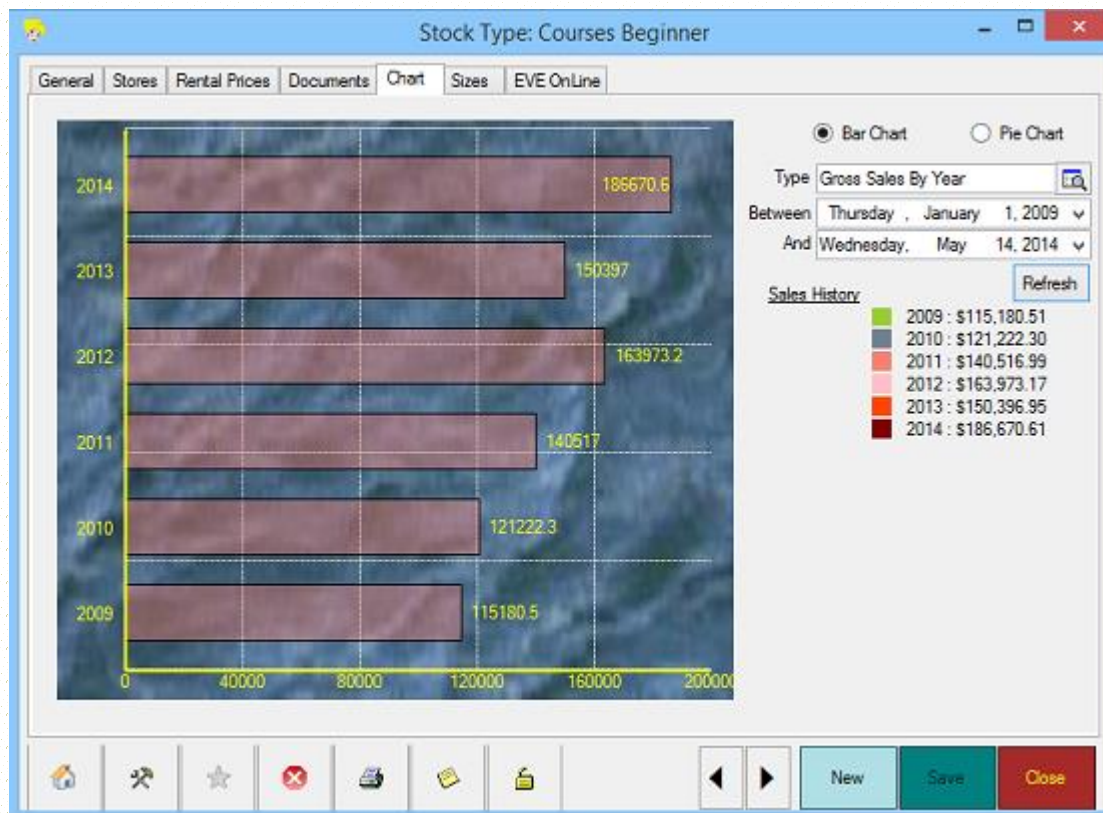
Buttons: Add, Remove.

At the bottom, there are icons for navigation and a set of buttons: New, Save, Close.

To add items from the allocated document list, click the **Add** button and select the document. To remove items, highlight the document and click the **Remove** button.

Chart

The Charts tab gives you a quick view of the sales associated with this particular Stock Type for various time frames either as a bar chart or a pie chart.

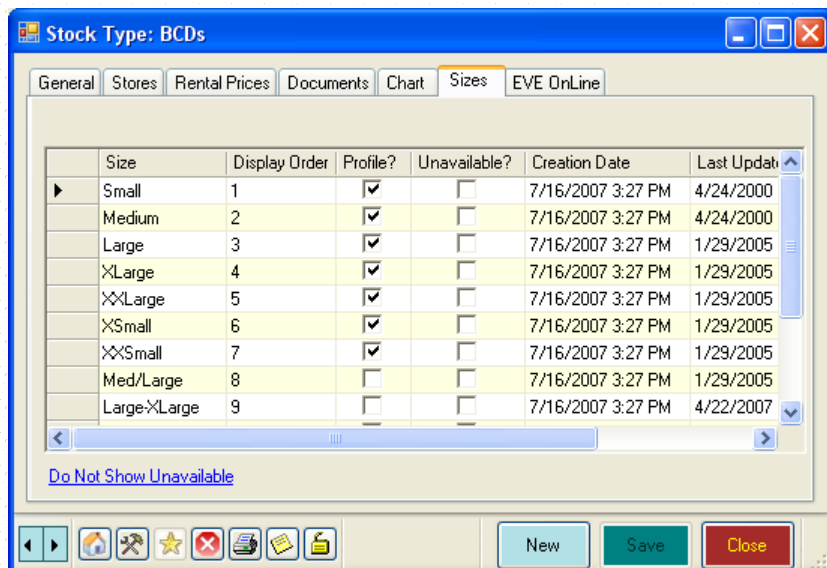


You can choose to display the chart for a number of Report Types including:

- ❖ Gross Sales by Year / Month / Day / Hour
- ❖ Net Sales by Year / Month / Day / Hour
- ❖ Profit by Year / Month / Day / Hour
- ❖ Qty Sold by Year / Month / Day / Hour

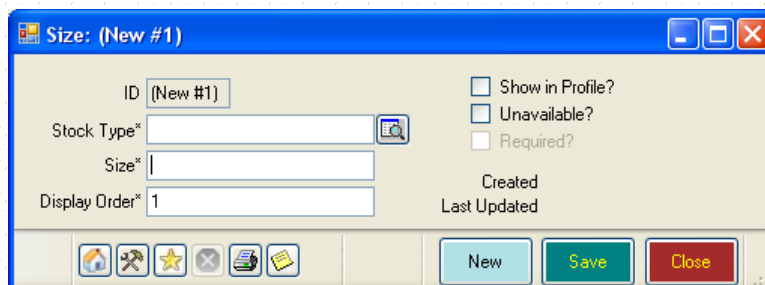
Sizes

You can define Sizes for each Stock Type where applicable. Each Stock Type may have different formats for the size; for example, air tanks could have 80cf or 100cf, while BCDs could have small, medium, large, etc.



Size	Description of the Size
Display Order	If you want to change the display order of Sizes when they are displayed elsewhere (e.g. in the Rentals module), enter the preferred Display Order. If no order is entered, sizes will display in alphabetical order.
Profile?	Put a tick in the Profile column if you want the size to appear in the Customer Profile (see section 7.2.8) and in the Course Requirements and Trip Requirements (see section 10.1.2)

You can also add a new size by selecting New from the **File** menu and adding a size from inventory.



Stock Type	Select the Stock Type from the pop up list box.
Size	Description of the Size
Display Order	If you want to force the display order of Sizes, enter the preferred Display Order. If no order is entered, sizes will display in alphabetical order.
Show in Profile?	Put a tick in the Show in Profile box if you want the size to appear in the Customer Profile (see section 7.2.8) and in the Course Requirements and Trip Requirements (see section 10.1.2)

EVE OnLine

The EVE OnLine tab is where you enter information specific to EVE OnLine - i.e. the e-Commerce companion product to EVE. If you have purchased EVE OnLine your customers can view and buy your EVE products on the Internet.



Search Engine Tag	For use with EVE OnLine, the e-Commerce product that can be used in conjunction with EVE. Text entered in the Search Engine Tag field will be added to the EVE OnLine page so search engines will index it better.
Display Name	If your EVE OnLine is configured to use the Simple Category List (log in to EVE OnLine using your EOLAdmin account, click Website Properties, choose the Product Settings Category and then the Simple Category List property), you can display a different name for the Stock Type in EVE OnLine than you use in EVE. Enter the EVE OnLine name here. If there is no name defined here, EVE OnLine will use the Stock Type name.
Header Name	If your EVE OnLine is configured to use the Simple Category List, you can group similar Stock Types together within a section and give the section header a name. Choose the Header here. You can also enter new Headers by clicking New EOL Header on the picklist form.
Class Name	Advanced users only: if you want the Stock Type to have a different style than the default, you can enter a CSS class name here that defines the appearance.

5.1.7 Suppliers

General

In this section enter details of all Suppliers (i.e. Distributors and Manufacturers) that you deal with.

Supplier	Enter the name of the Supplier
Salesman	Enter the name of the Salesperson responsible for your account.
Contact #1, #2, #3	Enter the name of your primary Contacts at the Supplier
Line 1	Enter the Address details of the Supplier

Line 2	
Line 3	
Line 4	
Postcode	
Country	
Telephone #1	Enter the Contact details for the Supplier. If you enter an Email address, you will be able to send an email by clicking the  icon. If you enter a Website, you will be able to jump directly to the website by clicking the  icon. A new link will be added in Links for each supplier with web details you create.
Telephone #2	
Fax	
Email	
Web	
B2B Email	Some suppliers may have an on-line ordering system - i.e. a means of ordering products on their website. Some of these allow EVE to communicate with them so a Purchase Order created in EVE can be uploaded directly to their ordering system. For those that allow the link via email, enter the email address here.
B2B Fn	The Supplier will expect the email attachment to be in a specific format that they understand. Click on the picklist button to the right of the Fn text box to pick the name of the routine that will be used to generate the file. At time of writing the options are B2BISSYS and B2Baqualung. The B2BISSYS format can be used if you are a distributor for other stores that use EVE. Those other stores can email you purchase orders that you can automatically import as Invoices into EVE to make the processing quicker and more reliable.
Notes	Any notes relevant for the supplier

Stores

Check the Stores that have access to this Supplier. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

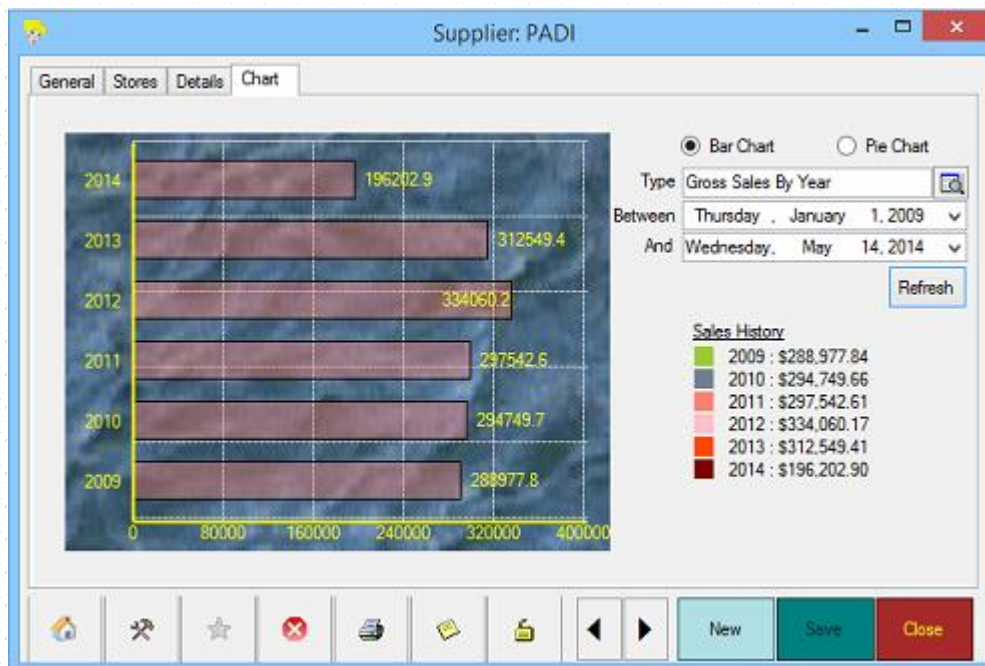
Details

Use the Details tab to enter information about your relationship with the Supplier at each Store. If you have multiple stores in your database, there will be a tab shown for each. In the diagram below there are 2 Stores: North Store and South Store.

Customer #	If applicable, enter the Customer # that was assigned to you by the supplier. This will be used as a reference on all Purchase Orders.
Account #	If applicable, enter the Account # that was assigned to you by the supplier. This will be used as a reference on all Purchase Orders.
Cost Price Level	<p>If the Supplier offers multiple pricing levels you can enter the level at which you purchase here.</p> <p>For example, PADI offers multiple pricing levels based on last year's purchase amounts. You can enter the level at which you buy PADI products. When you create Stock Items you can enter (or import) the price for the Stock Item at each level. EVE will cross reference this data and apply the cost at your level to any purchases you make from the Supplier. If you change levels for any reason, you can make one change here and all future purchases will be made at the new level.</p>
Customer Suffix	Some suppliers may issue you with a Customer Suffix for use with the B2B feature. If applicable, enter it here.
Default Purchase Tax Band For New Stock Items	If you pay tax on purchases from the Supplier, enter the Default Purchase Tax Band. You can override this for individual Stock Items if you choose.
Apply Purchase Tax Band To Existing Stock Items	Click the Apply Purchase Tax band to Existing Stock Items button to apply the purchase tax band you just entered, to all existing Stock Items you buy from the selected Supplier.
Default Shipping Instructions	Enter any Shipping Instructions you want to appear by default on Purchases Orders to the Supplier. You can override this on individual Purchase Orders.
Default Payment Terms	Enter any Payment Terms you want to appear by default on Purchases Orders to the Supplier. You can override this on individual Purchase Orders.

Chart

The Chart tab gives you a quick view of the sales associated with this particular Supplier in various time frames either as a bar chart or a pie chart.



You can choose to display the chart for a number of Report Types including

- ❖ Gross Sales by Year / Month / Day / Hour
- ❖ Net Sales by Year / Month / Day / Hour
- ❖ Profit by Year / Month / Day / Hour
- ❖ Qty Sold by Year / Month / Day / Hour

5.1.8 Tax Bands

Enter details about the Tax Bands that apply to either your sales or your purchases.

In some locations, tax must be paid on sales to more than one tax authority i.e. the sale of a single item will incur two tax components. For instance, in some locations, city tax and state tax are both incurred. To support this, EVE allows you to nest 'child' Tax Bands within 'parent' Tax Bands, in effect creating a tax group. In the example given, you could create a composite tax band, called City+State and mark the pre-defined city tax and state tax as being its components. When an item subject to City+State tax is sold in the Sales Module, the invoice will show tax calculated using the composite rate (i.e. city tax and state tax will be charged). In the background, EVE independently tracks the amount of city tax incurred and state tax incurred. You can see a breakdown of the taxes using the sales reports.

General

Tax Band	Enter the name of the Tax Band.
Tax Rate	Enter the Rate at which tax is calculated.
Account	If you plan to export data to QuickBooks, you need to inform EVE which QuickBooks accounts will accept data from which Tax Bands. Choose an account from the list of accounts you defined in the QuickBooks accounts (See Section 19.QuickBooks).
Tax Agency	If you plan to export data to QuickBooks, you need to inform EVE, which Tax Agency is responsible for handling this type of tax. Enter the Tax Agency that applies to this Tax Band. Tax Agencies are held in Suppliers (See Section 5.1.7.Suppliers) - i.e. you should set up your Tax Agencies to be Suppliers and can then choose the appropriate one here.
Customer Exemption Allowed	If some Customers might be exempt from this tax, you will want to check the <i>Customer Exemption Allowed</i> checkbox. In the Customers module, the tax band will then appear in the Tax Exemptions list and you can put a check mark against it for particular customers to indicate they are exempt.
Child Tax Bands	If the tax band represents a Tax Group, use Child Tax Bands list to enter any component taxes that comprise the Tax Group. Click the Add button to bring up a list of all existing Tax Bands. Highlight a Tax Band and click the Remove button to remove a Tax Band from the list.

Stores

Check the Stores that have access to this Tax Band. If you checked the *Put a Check Mark against All Stores* option when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), all Stores will be selected. Otherwise only active Store for this PC is selected.

6 SALES

The Sales Module forms the core of your dive center's point of sale system. Through the Sales Module, you can issue invoices, refunds, gift cards, gift certificates, quotes and make account payments (all of which are generically termed transactions).

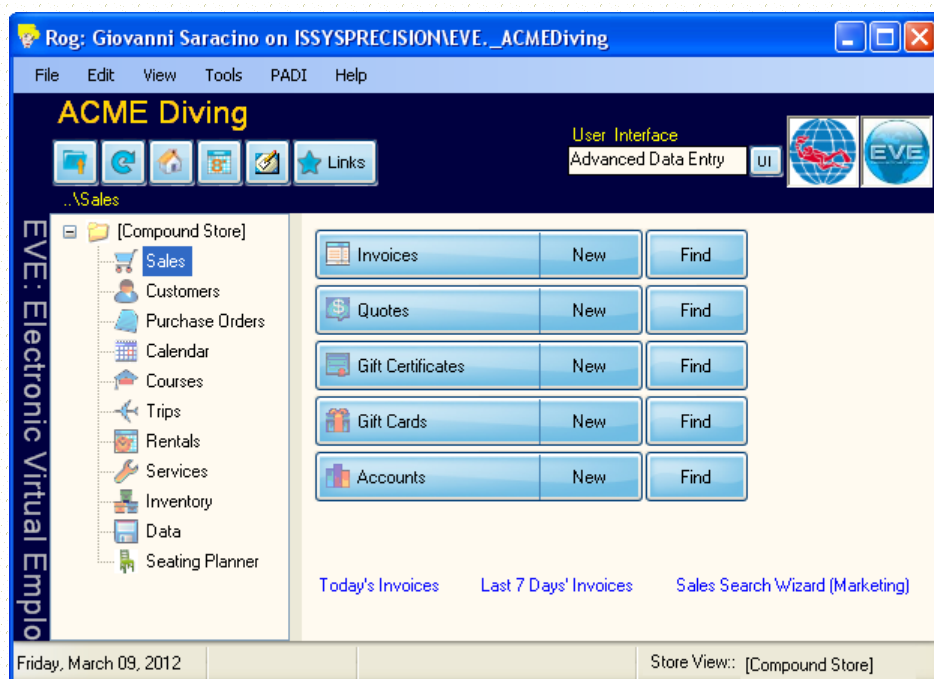
Receipts and invoices can be printed on any windows based printer and most specialized receipt printers. Connect a barcode scanner, barcode printer and cash-drawer to your PC to create the complete electronic point of sale system. Maintain accounts receivable and default Discount Bands for privileged customers. A powerful Search Wizard allows all transactions to be easily referenced. You can export your sales information to the QuickBooks accounting program or to Microsoft Excel.

The EVE profit tracker allows you to analyze how much money you are making. Daily / weekly / monthly / yearly sales reports can be produced in seconds.

The program is designed to be user friendly; staff training takes only a few minutes. Your customer and employee of the month can be easily identified for possible awards and cross promotions with other businesses. This encourages competition among staff members, making them more attentive to customers.

6.1 Sales

Select the Sales Module from the Hierarchy or the Module buttons. You can create or find an Invoice, Quote, Gift Card, Gift Certificate, Gift Card or Customer Account.



Click New Invoice from the Button Array to initiate the sales process - i.e. open the Invoice form. You can tab through the fields on the form or use the Cool Bar at the right of the form to speed your data entry.

You may also begin a sales transaction in the Customers Module. Select the Customers Module from the Hierarchy or the Module buttons. Find the customer you wish to sell to by using the customer search option. Choose the sales related customer information. Click New Invoice on the bottom of the screen.

General

Invoice: (New #1)

Cost Center: Diving Inc Invoice #: (New #1)
 Type: Sales Receipt Created:
 Employee: Glen Becker
 Customer: Nicki Eger

Shopping Basket Unpaid Invoices Payments

Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item	Discount Band	Tax Band
1	ADW	£333.00	£299.70	£0.00	£299.70	Advanced Openwater	10% Off	No Tax
1	388045	£100.00	£100.00	£5.00	£105.00	Apeks Surelock Weigh		Sales Tax MD
1	CL13	£100.00	£100.00	£5.00	£105.00	Clip - Hook to Octo		VAT

Notes: Lake Rawlings, VA. Classroom session 6:30-8pm Aug 14th. Meet at lake 11am Saturday. Deep, Nav, Night, PPB, S&R, Wreck (and Digital Photography if student wishes.)

Sub-Total: **£499.70**
 Tax: **£10.00**
 Total: **£509.70**

New Save Close

Cost Center

Normally, you will not need to enter the Cost Center as EVE will set it for you when you add the first item to the Shopping Basket.


Since a Cost Center is a company, once a Cost Center has been set for the invoice, you will only be able to add other items that are linked to that same Cost Center - i.e. you cannot sell items on one invoice from different Cost Centers.

Type

Select the Invoice Type from the pop up list box. If you identified a *Default Invoice Type* when defining Setting Sales Options (See Section 4.3.2.Sales Options), it will be automatically applied to the invoice for. There are six primary types of invoices:

- ❖ Sales Receipts are the most commonly used invoice type in EVE. It represents the case where the customer purchases items and pays for them straight away (or puts the price on their account). When Sales Receipt is chosen, EVE will insist that the amount tendered is equal to the sum of the items in the shopping basket when the invoice is saved.
- ❖ Invoices are used to sell an item to a customer where payment is required at some future date. For example, you may use an invoice when you sell an item to a commercial vendor, where payment is due in 30 days. Or alternatively, if you have a mail order business where invoices are sent with the product for payment on receipt, an invoice can be used. No payments can be added to an Invoice. Instead, when the customer sends payment, the invoice should be opened and converted to a sales receipt so payment line(s) can be added. By default, Invoices are not exported to QuickBooks but you can change this behavior if you wish using the Invoice Type section in the Data module.
- ❖ Ongoing Invoices will be most used by dive resorts that allow customers to run a tab. With an ongoing invoice, customers can keep a tab open adding items over the duration of their stay in the resort. An ongoing invoice can be used multiple times and items added/removed each time without the

	<p>requirement that the ongoing invoice be balanced. At the end of the customers stay, the ongoing invoice will need to be converted into a Sales Receipt and final payment taken to balance the total. By default, Ongoing Invoices are not exported to QuickBooks but you can change this behavior if you wish using the Invoice Type section in the Data module.</p> <ul style="list-style-type: none"> ❖ Layaways are used when a customer purchases an item and then makes payment installments over a period of time. Layaway invoices can be closed without the total tendered needing to match the total amount received. The Balance will show you the total amount of the layaway less the amount the customer has paid so far. When final payment is made, the balance will be zero and the layaway invoice should be converted into a Sales Receipt. By default, layaways are not exported to QuickBooks but you can change this behavior if you wish using the Invoice Type section in the Data module. ❖ Expenses are used when money is taken out of the cash drawer as petty cash to purchase supply items for the store or when you “sell” inventory to the store for internal use on a course or a trip. You can associate expenses with a course or a trip and automatically create an expenses invoice. ❖ Bank Deposits are used when money is taken out of the cash drawer to deposit at the bank allowing for accurate tracking of cash amounts in your till.
Employee	<p>If you selected <i>Default Employee on New Records</i> when defining Data Entry Options, the name of the currently logged on employee will be added automatically here. Otherwise, no employee will be added and you will need to choose the employee responsible for this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Customer	<p>If you are going to identify a customer for this transaction, enter his or her name here.</p> <p>If you have selected <i>Search by Typing First Name First</i> when you set Customer Options (See Section 4.3.3.Customers Options), you would enter the customer's first name. Otherwise, enter the customer's last name. As soon as you begin typing, the Customer Search box will open allowing you to filter your data and search more effectively for the customer making the purchase.</p> <p>If this is a new customer making a purchase, click the New button on the Search form and you will be able to Create a New Customer.</p> <p>If the selected customer owes (or is owed) money, the amount in question is displayed to the right of the customer's name. The amount is shown in red if the customer owes money (i.e. they have bought goods on account), and in green if they have a positive credit (i.e. they have made account payment(s) in excess of the amount owed). In addition, the customer field will turn red if the customer has a balance owing or light green if the customer has a credit amount.</p> <p>If the customer has any Popup Notes associated with them (e.g. you may have added a note for John Smith to indicate he left his wallet in the store last weekend) they will be displayed when his/her name is added to the invoice. See section 4.3.3 to learn how to configure which popup notes are shown.</p>
Invoice #	<p>The invoice number is generated by EVE. It will display as 'New #XX' (where XX is the number of invoices created in this session of EVE) until you save the</p>

	invoice, at which point EVE will assign a permanent invoice number.
Created	You do not need to enter a value for the 'Created' date since, when the invoice is saved, EVE will enter a time stamp for you. However, for those occasions when you need to back-date an invoice, you can click on the padlock next to the field to unlock it so you can type a different date (provided you are authorized). Leave the padlock open when you save the Invoice.
Payment Due	If you choose 'Invoice' as the Invoice Type, the Payment Due field will become visible so you can indicate the payment due date.
Source	If you have a tick in the "Show 'Source' on Invoice form" box on the Sales tab of the Options form (see section 4.3.2), you can choose the reason that the customer entered your store today. E.g. Passed the Shop or Yellow Pages, etc. The value you choose is saved to the Invoice (not the customer). This should not be confused with the Enquiry Source field on the Customer form which is where you can log how the customer first learnt of your store.
Notes	<p>Use Notes to enter any free-text comments that you wish. The Notes are printed onto the invoice. At the top of the Notes text box are some icons . You can set these to hold text that you commonly add to a transaction. You can then click on the icon to add the text to the Notes field.</p> <p>To define the text for an icon, right click on it and click Edit. A prompt is shown so you can enter text up to a maximum of 255 characters. When creating a transaction next time, click on the Notes icon and the previously defined text is added to the Notes text box</p>

6.1.1 Selling Stock Items

Shopping Basket

Use the shopping basket to add items to the customer's purchase. For fastest data entry, you can enter items using the pale blue Barcode #, Stock # or Description field on the main invoice form. For any of these fields, you can search using EVE's field matching capabilities. Use the matching option beside the field to set the match criteria (change which type of match is performed by clicking on the A symbol):

- ❖ A* - Match start of field
- ❖ *A - Match end of field
- ❖ *A* - Match any part of field
- ❖ A - Exact Match

Usually, you will want to search barcodes based on an exact match (A), while stock # and description may be on a partial match to the start of the field (A*)

Barcode #	<p>The barcode # field is used in conjunction with a barcode reader to quickly add Stock Items to the shopping basket.</p> <p>Only barcode readers that send information to the computer as if you had typed it are currently supported. Most barcode scanners work this way.</p> <p>To select stock items within EVE, position the cursor into the Barcode # field (by pressing F9 or by holding down the ALT key while pressing B or by left clicking in the field) and swipe the barcode. EVE automatically searches for the matching Stock Item and adds it to the shopping basket.</p> <p>Note: when the barcode is swiped, data is written to whichever field is active. Make the Barcode # field active before swiping the barcode to allow the functionality described above to be successful. Most barcode readers can be programmed to send additional characters before and/or after the barcode</p>
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	<p>data. Programming your reader to send an F9 key before the barcode data will automatically set focus to the barcode # field immediately prior to the barcode data being sent.</p> <p>Note: you can use the Barcode # field without a barcode reader. Type the barcode number (this is usually displayed beneath the barcode on the label) directly into the barcode # field and press the Enter key.</p>
Stock #	If you know the stock number (SKU) of the item, type it into the Stock # field and press the Enter key. EVE searches for the matching Stock Item and adds it to the shopping basket automatically.
Description	If you know the description of the item, type it into the Stock # field and press the Enter key. EVE searches for the matching Stock Item and adds it to the shopping basket automatically.

If you do not know the Barcode #, Stock # or Description of the specific item you are selling, you can search for it using the Stock Item search box by first clicking on the Search button in the Stock Items section on the Coolbar on the right of the form. See Searching for Data for more information. There are a few special comments on Stock Item searches below.

Stock Type	This pop up list box on the Stock Item Search form holds a list of all Stock Types that are marked for sale. If you select one, Stock Items are filtered to show only those items that have that Stock Type.
Retail Price tab	This tab is only important if you have more than one Cost Center defined. You can set up EVE so the same stock item has a different Retail Price in each Cost Center. You could do this, for example, so that if you sell the item through the store, one price is used and if you sell the item as a mail-order, a different price is used. Use the Retail price tab to indicate which price you want to see for stock items that match your search criteria.
Customer Order Prompts	When adding an item to the shopping basket you may find that you are temporarily out of stock and need to order in more units. To prevent the newly ordered items from being sold to other customers when they arrive, you can set up a special customer order. The item is marked as being reserved for a particular customer on the Purchase Order. To use customer orders (also known as a Special Orders), check the <i>Show Customer Orders Prompt</i> checkbox when Setting Sales Options (See Section 4.3.2.Sales Options).
Coolbar: Items Awaiting Payment	If the customer has rental or service bookings that have not yet been paid for, click the "Items Awaiting Payment" button in the Stock Items section of the Coolbar on the right hand side of the Invoice form. Those bookings will be listed and you can add them straight into the Shopping Basket.
Coolbar:Import from CSV	<p>You can use barcode devices with EVE that store barcodes on them which can then be uploaded into EVE. You could use one of these, for instance, when walking around the store with the customer, scanning barcodes on those items the customer is interested in. Then, at the end, upload the barcodes into EVE so EVE can add those items to the Shopping Basket for you. Any barcode device that can create a CSV file (Comma Separated Values) is supported. The CSV file must have at least 2 columns; the first holds barcode numbers; the second holds quantities of each item required.</p> <p>Contact EVE Diving if you would like us to recommend a make and model.</p>

Once you find the item you wish to sell on the Stock Item Search form, double-click on it to add it to the customer's shopping basket.

By default, if an item is already in the shopping basket and you add it again, the quantity in the shopping basket is increased. If instead, you want to create a second line item in the shopping basket, hold down the Shift key on your keyboard when you double-click on the item in the stock grid. You might want to do this if you wish to give different discounts on the same item (for example, buy one, get one free). In addition, some items require a Serial Number to be assigned when they are sold (e.g. Regulators, etc). These items are classed as 'One of a Kind' and will always appear on their own line in the Shopping Basket since the Serial Number is written to the line item.

If you always want each item to appear on its own line (and you don't want to hold the Shift key down every time), put a tick in the "Each item appears on its own Row in Shopping Basket" box on the Sales tab of the Options form.

If an item is added in error select the row (by clicking in the leftmost grey column) and press the Delete key on the keyboard or right click on the row and click Delete in the popup menu.


The following fields will be completed when you select a Stock Item.

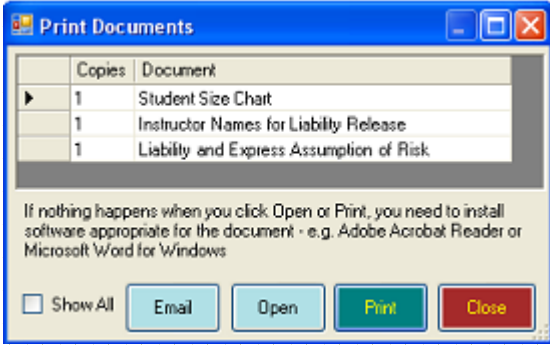
Quantity	The number of units of the Stock Item in the shopping basket. When an item is added, this defaults to 1. You can type in another amount if you choose. Each time you double-click on the Stock Item in the Search box the quantity will be incremented. If using a barcode reader the quantity is incremented during multiple swipes.
Stock #	Indicates the unique stock number. The text is not editable.
Unit Price	The price before tax of one unit of the Stock Item. When an item is first added to the shopping basket the unit price shown is the retail price before tax that you defined in Stock Items. If you have the requisite privilege, you can change the value by typing directly into the grid. Changing the value only affects the value of the item on this invoice - it does not affect the retail price of the Stock Item.
Price	<p>The price before tax of all units being purchased of the item. EVE calculates the price based on quantity * unit price. This figure is reduced if a discount is being applied. If you have the requisite privilege, you can override the value by typing directly into the grid - EVE will automatically recalculate the tax.</p> <p>If you have identified this customer as having a customer type when Creating a New Customer and if you have assigned that customer type special pricing in Stock Items, then the price will display the special pricing as appropriate for this customer. If the customer has multiple Customer Types identified, the best discount will be applied. For example, if the customer is both a club member and an employee, EVE will apply the better discount for the customer.</p> <p>If you have a Store Sale in effect which results in a discount on an item, (See Section 4.3.2.Sales Options), EVE will apply the appropriate discount for the sale. Again, EVE will apply the best discount available to the customer whether it is the customer type discount or the store sale discount. EVE does not apply discounts on discounts (i.e. the store sale is not applied on top of the customer pricing), rather the best discount applies.</p>
Tax	<p>The amount of tax. EVE automatically calculates this based on the Price value and the tax band of the item's Stock Type. You cannot change the amount of Tax directly, but you can choose a different Tax Band (see later in this section) if you are authorized and EVE will then recalculate the tax for you.</p> <p>Some customers may be tax exempt, which you would have defined when Creating a New Customer. In this case the tax is calculated with a value reflecting the tax exemption. If multiple taxes apply (for example state/provincial tax and federal tax), the customer may be made exempt from one or all of them.</p>

Total	The sum of price and tax for the item. EVE automatically calculates this. If you have the requisite privilege, you can override the value by typing directly into the grid. If you change the value, EVE recalculates the Price and Tax accordingly.
Stock Item	A description of the Stock Item. Corresponds to the invoice description defined in the Stock Items. You can change the text in this field. You may want to do this, for example, if you have a generic stock item called, e.g. Expenses, that you use for PayOuts and you want to change the wording to e.g. Drinks for Staff, etc.
Discount Band	<p>If the customer has been identified with a customer type which attracts a discount, (set when Creating a New Customer - see section 7.1) then the Discount Band will be defaulted to the appropriate value for you. You can override this value if you have the requisite privilege.</p> <p>If you have defined Discount Bands that are marked for 'Manual Use' (see section 5.1.2), you can choose one of them from the pop up list box. If you select a value, the price, tax and total figures are adjusted accordingly.</p> <p>If you override the price, tax or total value manually, EVE sets the Discount Band to 'Special'.</p> <p>If you have set a Discount Band to apply during store sale in Stock Items and if you have checked the <i>Use Sale Prices</i> checkbox when Setting Sales Options (See Section 4.3.2.Sales Options), then EVE will apply the appropriate Discount Band for the sale.</p> <p>EVE will apply the best discount available to the customer whether it is the customer type discount or the store sale discount. EVE does not apply discounts on discounts (i.e. the store sale is not applied on top of the customer pricing); rather the best discount applies.</p> <p>You can also quickly apply a Discount Band to several stock items together by first selecting the stock items (right click on the grid and click Select All if the discount applies to the whole invoice) then right clicking on the selected area and clicking "Apply Discount to Selected Item(s)". EVE will show a list of discount bands and you can choose the appropriate one. In this way, you could select all items in the grid and apply, for example, a 5% discount to all items.</p>
Tax Band	<p>When a Stock Item is added to an invoice, the tax band is defaulted to the value as defined for the item's Stock Type.</p> <p>Some customers may be tax exempt, which you would have defined when Creating a New Customer. In this case the pre-defined tax band is overridden with a value reflecting the tax exemption. If multiple taxes apply (for example state/provincial tax and federal tax), the customer may be made exempt from one or all.</p> <p>If you have the requisite privilege, you can override the value by selecting a new tax band from the pop up list box in the grid.</p>
Tax Rate	This value is not editable. It indicates the actual rate of tax for the tax band chosen - e.g. 5%
Quantity Awaiting Pick Up	Use this field if the customer has temporarily left the item at the store and will pick it up later. For example, a customer may purchase items and then wish to return at the end of the day to pick them up. You can indicate that the items are awaiting pick up here. When the customer picks up the item, you should change this value to 0(zero)
Notes	Any time a discount is offered, EVE enters a note reflecting the type of

	discount. The text is editable so you can enter your own notes relating to the item.
Stock Type	Indicates the category of the Stock Item, for example, Wetsuit, Snorkel, etc. The text is not editable.
Manufacturer	Indicates the manufacturer of the Stock Item. The text is not editable.
Size	Indicates the size of the Stock Item if applicable. The text is not editable.
Primary Color	Indicates the primary color of the Stock Item if applicable. The text is not editable.
Secondary Color	Indicates the secondary color of the Stock Item if applicable. The text is not editable.
Ref	Not used currently.
Creation Date	Indicates the date/time that the item was added to the shopping basket.
Sub Total	These boxes (at the bottom right of the Invoice form) show the amount (pre-tax) and tax due on the transaction. They are not editable. The sub-total is the sum of all prices in the shopping basket grid. The tax is the sum of all taxes in the shopping basket grid. The total is the sum of the sub total and tax. If you have checked the <i>Show Tax Components on Invoice</i> when Setting Sale Options (See Section 4.3.2.Sales Options) and if you have multiple taxes as part of your tax band, the individual tax components will be shown on the printed receipt while the combined tax components will be shown on the form. For example, in Canada you might see two tax lines on the printed receipt showing the amount of GST and PST incurred. In America, you might see City Tax and State Tax.
Tax	
Total	

The sale of some Stock Items may have additional data entry requirements; these are outlined below:

Serial Numbers	<p>If you select a Stock Item that requires a serial number (as defined in Stock Items), you will be prompted to identify the serial number of the product by selecting it from the Select Serial Number pop up list box.</p>  <p>If the serial number for the Stock Item is not shown, you may add one using the New Serial Number button.</p> <p>The Stock Item description in the shopping basket will be modified to reflect the serial number of the item you have sold.</p> <p>Note: if you make a special order for a customer, you probably do not know the serial number of the item when it is added to the shopping basket. You can enter a made-up serial number, for example, "N/A" and save the invoice.</p>
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	When the item arrives in the store you can open the original invoice, click on the stock item in the shopping basket, click the Options button at the bottom left of the invoice and click Change Serial Number to add the real number.
Documents	<p>If you have linked Documents to Stock Items, you will be presented with a Print Documents form after you save an invoice on which these Stock Items are sold. This is useful when there is documentation that a customer needs related to the purchase of a particular Stock Item. For instance, you might want to create a Standard Liability Release document in Microsoft Word and link this to Stock Items relating to courses or create a Care and Maintenance of your Purchase document and link it to the sale of items that you provide service on.</p>  <p>Change the number of Copies if necessary (type 0 if you don't want to print a particular document on this occasion) and click the Print button to print any selected forms, so that the customer can complete / sign all documentation immediately. Alternatively, you can email the documents to the customer from this form.</p> <p>In the Documents section (section 4.4.14) you may have listed a number of documents that are not currently linked to the stock item(s) you are selling. If the document you are interested in is not listed, click the Show All check box to list all documents that EVE knows about.</p>

6.1.2 Selling Gift Certificates

When Selling Gift Certificates there are a few additional steps required to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

A customer may purchase gift certificates for themselves or for a friend or family member. At a later date the owner of the certificate may use it to purchase goods of the same value (i.e. it can be used as the payment method on an invoice).

Customer is a required field on the Invoice form when Selling Gift Certificates.

Choose Gift Certificate as the Stock Type. EVE comes preloaded with this stock type and stock item. Double-click on the Gift Certificate stock item and the following pop up list box will appear:

Gift Certificate

The screenshot shows a software window titled "Gift Certificate: (New #1)". It contains several input fields: "Gift Certificate #" (empty), "Employee*" (filled with "Robert Aschemann"), "Purchased By*" (filled with "Justin Dabdie"), "Recipient*" (filled with "Justin Dabdie"), "Amount*" (filled with "\$100.00"), "Expiry Date*" (filled with "Friday May 15, 2015"), and "Notes" (empty). A button labeled "Copy 'Purchased By' to 'Recipient'" is positioned between the "Recipient*" and "Amount*" fields. At the bottom right are "OK" and "Cancel" buttons.

Gift Certificate #	<p>By default, EVE is set up to automatically generate gift certificate numbers for you. If you issue pre-printed gift certificates, with numbers already assigned, you can change this behavior so that you type the certificate number yourself by un-checking the <i>Auto-Generate Gift-Certificate Numbers</i> checkbox when Setting Sales Options (See Section 4.3.2.Sales Options).</p> <p>Be careful not to use the same certificate number more than once or duplicate key errors will result.</p>
Employee	<p>Employee will automatically default to the employee selected on the Invoice. You can change the employee by selecting another from the pop up list box if you choose.</p>
Purchased By	<p>Purchased By will automatically default to the customer you selected on the Invoice.</p> <p>You can change the purchaser by entering another customer if you choose. In the Customer Search box type the name of the customer who the certificate is being bought by. Just as on the main sales form, EVE will perform a search through existing customer records.</p> <p>If the customer is not already on the database, click New on the Customer Search box and enter the new customer details.</p>
Recipient	<p>You can choose the recipient by searching for another customer if you choose. In the Customer Search box type the name of the customer for whom the certificate is being bought. Just as on the main sales form, EVE will perform a search through existing customer records.</p> <p>If the customer is not already on the database, click New on the Customer Search box and enter the new customer details.</p> <p>If the customer is buying the gift certificate for themselves you can click "Copy Purchased By to Recipient"</p>
Amount	<p>The Amount will default to the amount you set up for the Gift Certificate stock item's retail price. You can change the amount here if you choose.</p>
Expiry Date	<p>The expiry date defaults to today's date plus the number of months you identified for the <i>Gift Certificate Duration</i> when Setting Sales Options (See Section 4.3.2.Sales Options).</p>
Notes	<p>Enter any Notes that you want printed on the gift certificate.</p>

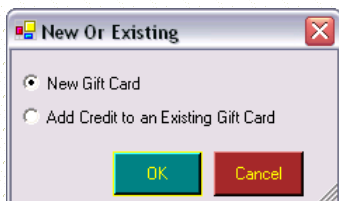
6.1.3 Selling Gift Cards

Gift Card - New

When Selling Gift Cards there are a few additional steps required to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below. Customer is a required field on the Invoice form when Selling Gift Cards.

A customer may purchase gift cards for themselves or for a friend or family member. At a later date the card may be used as a payment method when purchasing goods. As the value of a gift card is decremented, additional funds may be placed on the card. For information on purchasing pre-printed plastic gift cards that you can sell to your customers, contact EVE Diving.

Choose Gift Card as the Stock Type in the stock item search box. EVE comes preloaded with this Stock Type and two different gift cards Stock Items (one valued at \$50 and one valued at \$100). You can add additional Gift Card Stock Items if you wish. Double-click on the gift card stock item you wish to use and the following pop up list box will appear:



Choose the option which best represents this transaction.

Gift Card - New

Gift Card ID	EVE will auto-generate this number for you when you click OK.
Gift Card #	<p>Gift Card Number will default based on the gift card # option which is selected:</p> <ul style="list-style-type: none">❖ Use Gift Card ID: if this option is chosen, EVE will automatically generate an incremental gift card number for you when you click OK.❖ Use Club Membership #: if this option is chosen, EVE will use the customer's club membership number as the gift card number. This option lets you issue club membership cards that also act as gift cards. If the customer is not a member of a club, EVE will issue an error message.❖ Use Customer ID: if this option is chosen, EVE will use the customer ID as the gift card number.❖ Manually Type #: if this option is chosen, you will be able to manually type

	<p>the gift card number.</p> <p>Be careful not to use the same gift card number more than once or duplicate key errors will result.</p>
Employee	<p>Employee will automatically default to the employee selected on the Invoice. You can change the employee by selecting another from the pop up list box if you choose.</p>
Purchased By	<p>Purchased By will automatically default to the customer selected on the Invoice.</p> <p>You can change the purchaser by entering another customer if you choose. In the Customer Search box, type the name of the customer who is buying the card. Just as on the main sales form, EVE will perform a search through existing customer records.</p> <p>If the customer is not already on the database, click New on the Customer Search box and enter the new customer details.</p>
Owned By	<p>You can choose the recipient by entering another customer if you choose. In the Customer Search box type the name of the customer for whom the card is being bought. Just as on the main sales form, EVE will perform a search through existing customer records.</p> <p>If the customer is not already on the database, click New on the Customer Search box and enter the new customer details.</p> <p>If the customer is buying the gift card for themselves, click 'Copy Purchased By to Owned By'</p>
Amount	<p>The Amount will default to the amount you set up for the Gift Card stock item's retail price. You can change the amount here if you choose.</p>
Type	<p>Two Types of Gift Cards are currently supported: 'Standard' and 'Loyalty Program'. When selling Gift Cards you will usually use the Standard type. EVE will use the Loyalty Program type internally when credit is being applied to cards as part of the loyalty program.</p>
Status	<p>A new gift card will have a status of Valid. Other statuses are discussed fully in Receiving Payments (See Section 6.2.1.Receiving Payments).</p>
Cost Center	<p>Cost Center will automatically default to the Cost Center identified on the Invoice.</p>
Notes	<p>Enter any Notes that you want associated with the gift card.</p>

Gift Card - Existing

Select the Swipe Card tab if you have the technology in place to swipe gift cards.

Swipe	If you have an MSR (Magnetic Stripe Reader), you can swipe the gift card into your point of sale system and the gift card information will be displayed.
Gift Card #	
Gift Card ID	
Owned By	
Credit On Card	
Amount Of Credit To Add	Enter the amount of credit you wish to add to the card. The current card value will be incremented by the amount you indicate.

Use the Select Card tab if you do not have swipe technology for your gift cards.

Gift Card #	A list of gift cards, owned by the customer you selected on the Invoice will be shown along with the current credit amount and any Notes. Highlight the card you wish to add credit to.
Credit On Card	
Notes	
Different Customer	If this customer (purchaser) is adding a credit to another customer's (recipient) gift card, click Different Customer button to bring up the Customer Search box. That customer's cards will then be listed.
Amount Of Credit To Add	Enter the amount you wish to add to the card. The current card value will be incremented by the amount you indicate.

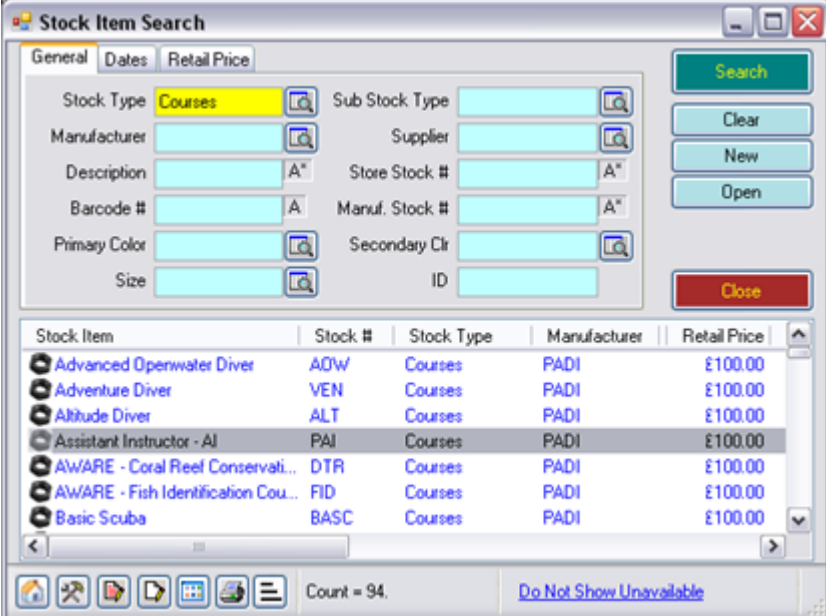
You are now ready to Receive Payment.

6.1.4 Selling Courses

When Selling Courses there are a few additional steps required to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

You will use this process when you are Selling Courses for the first time to a customer or if the customer is already enrolled on a course and you are collecting the balance of payment (if they only made a down-payment for the course up-front).

Stock Item Search



The screenshot shows the 'Stock Item Search' window with the 'General' tab selected. The 'Stock Type' is set to 'Courses'. The search results table is as follows:

Stock Item	Stock #	Stock Type	Manufacturer	Retail Price
Advanced Openwater Diver	AO/W	Courses	PADI	£100.00
Adventure Diver	VEN	Courses	PADI	£100.00
Altitude Diver	ALT	Courses	PADI	£100.00
Assistant Instructor - AI	PAI	Courses	PADI	£100.00
AWARE - Coral Reef Conservati...	DTR	Courses	PADI	£100.00
AWARE - Fish Identification Cou...	FID	Courses	PADI	£100.00
Basic Scuba	BASC	Courses	PADI	£100.00

At the bottom of the window, it says 'Count = 94.' and there is a link 'Do Not Show Unavailable'.

When you select Courses in the Stock Items search box, the search results show all of the stock items you have set up to sell courses taught at your dive center. When you add one of them to the shopping basket, the Booking Wizard form is shown with the Select Course tab open so you can enroll the customer on a particular course session. Note: if the Booking Wizard form is not shown, the course stock item is not correctly linked to a course type on the Links tab of the Stock Item form.

Select Course

Customer: Robert Fairlie

Event Type: Courses ☐ Include Complete?

Course Type: Openwater Diver ☐ Show Calendar?

Available Courses. Double click to add to Assigned list. Key: Customer already enrolled = ●

Course #	Start Date	Max. Places	Places Avail...	Enrolled	Waiting List	Pro
OW 11/5/2008	11/5/2008	6	6	0	0	0
OW 11/19/2008	11/19/2008	6	6	0	0	0
OW 12/3/2008	12/3/2008	6	6	0	0	0
OW 12/7/2008	12/7/2008	6	6	0	0	0
OW 12/16/2008	12/16/2008	6	6	0	0	0
OW 12/17/2008	12/17/2008	6	6	0	0	0

Assigned Courses:

- OW 12/7/2008 (6)

New Course Remove

<< Previous Next >> Finish Cancel

Course Type	The Course Type you selected will display here. Below the course type a list of incomplete courses of the type selected will be displayed.
Include Complete	Put a check mark in the box if you want to see courses that have already been completed in the list. This might be useful if you are taking payment for the course after it finished.
Show Calendar?	If checked, a Calendar will be shown and courses(s) that can be sold using the stock item chosen will be shown as colored boxes on the calendar. If not checked, a list of courses will be shown.
Available Courses list	<p>The following information is shown in the Available Courses list:</p> <p>Course #: The unique course number.</p> <p>If the specific course you wish to enroll the customer on is not shown, you may create a new course by clicking the New Course button. You can Create a New Course by entering the course details.</p> <p>If the customer is already enrolled in a course of this type, a “●” symbol will be displayed next to the course number.</p> <p>If the course is full, it will be displayed with a shaded red bar over the course row.</p> <p>Start Date: The start date of the courses is displayed.</p> <p>Max Places: The maximum number of customers allowed in the course. Customers may be enrolled in courses, even when the maximum number will be exceeded if you have the <i>Can Exceed Max Number of Customers on a Course</i> privilege. When selling places on the course, EVE will prompt you if the maximum # is exceeded.</p> <p>Places Available: Next to each course is an indication of the number of places available (based on the maximum number of customers you set in the Courses Module and the number of customers already registered).</p>

	<p>Enrolled: The number of customers currently enrolled in the course.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p>
	<p>Waiting List: The number of customers who have been wait-listed for this course. You may wish to waitlist a customer on a course for a number of reasons, for example, when a course is full but there is the potential for a cancellation or if you are considering extending the maximum number of the course if you can secure additional staffing.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p>
	<p>Provisional: The number of customers who have provisionally enrolled in a course. You may wish to enroll customers provisionally for a number of reasons, for example, if there is a potential medical issue or if the customer is unable to commit to the schedule.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p>
	<p>Course Notes: Any course Notes that were set up when this course was created are displayed. These notes will appear on the printed receipt by default.</p>
	<p>Private Course Notes: some notes about the course that need not be shown to the customer.</p>
	<p>Language: the language that the course will be taught in.</p>
	<p>Store: the name of the Store the course was created in.</p>

Once you have identified which Course the customer wants to enroll on, double click on it (or select it and then click the + button) to add it to the 'Assigned Courses' list. You can add multiple courses to the Assigned List if the customer wishes to enroll on more than one. If you add a course to the Assigned list by mistake, select it and then click Remove.

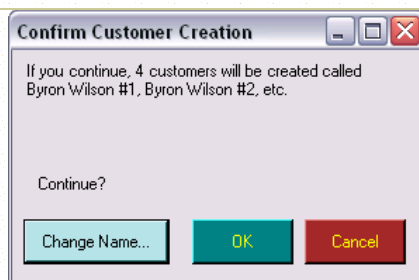
Right click on a Course to show a popup menu that has the following options.

Open	You can Open a specific course to look at additional details about the course including the names of the customers enrolled on it, the options that have been purchased or the full schedule.
Documents	<p>Click the Documents option to open a form showing pre-defined Documents relating to the course, for example, disclaimers or waivers. You can define which Documents relate to which course in Course Types or Stock Items.</p> <p>Click the Print button to print any selected forms, so that the customer can complete / sign all documentation immediately.</p>
Timetable	Click Timetable to print a document describing details of the selected course, including module dates, locations and instructor. You could print this out to give to the customer.

Select Customers

You can identify all of the customers this customer is purchasing the course for on the *Select Customer(s)* tab. For example, if a family is registering in a course, you may create only one invoice but have multiple customers enrolled. The customer you selected on the invoice will be automatically displayed in the list box. You can:

Add Customer(s)	Use the Add Customer button to add additional customers to the course and to list them all on this invoice. The Customer Search form will be displayed.
Add Group	Use the Add Group button to add additional customers that are members of the same Group.
Remove Customer	Highlight one or more customers and click the Remove Customer(s) button to remove customer(s) if you added them in error.
Open Customer	Highlight a customer and click the Open Customer button to review the customer details. You could use this form to confirm contact details for the customer, check for prerequisite certifications or check whether or not you have the customer's image for PIC processing.
Create a Group	Click this button if you have added multiple customers to the booking and you want to group them together so you can quickly add them to future courses/trips.
The Customer Is Block Booking The Course	Choose this option if the customer is booking multiple spots on the course for customers who will be identified at a later date. For example, if you are running a school program and the school is committing to 6 customers but does not yet have the names of the individuals, they can block book a course to hold the places.
Places	Choose the number of places the customer is block booking. You can click the Increase and/or Decrease button to change the number or type a value directly into the field.
Group Name	When you have finished entering information on this page and click Next to move to the next page, you will be asked to confirm customer creation.



EVE will create one customer for each place you have block-booked using the invoice customer's name as a place marker. You can change the customer names using the **Change Name** button if you are not satisfied with the default. It will change the name of all the new customers you are creating.

Options

If you have packaged items together with the course (section 5.1.5), the package items will be presented on the Options form. This way you can easily ask the customer if they would like to purchase the additional items required for the course. You may also want to package any materials that you include in the course costs (for example, if you provide an Open Water crew pack at no charge in your course, you would add it to the course package and apply a 100% discount).

The Selling Packages process outlines the steps you would take to create and sell a package.

 A screenshot of the "Booking Wizard" application window, specifically the "Options" tab. At the top, the "Customer" field contains "Justin Dabbie". Below the tabs (Introduction, Select Courses, Select Customer(s), Options, Requirements, Course Price), the course is identified as "OW 2/15/2014 South W (8)". A message states: "If there are options defined for this Course, put a tick against each one the customer wants to purchase." Below this is a table with columns: Customer, Rentals, Openwater Diver, and Open Water Crew-Pak with eRDP. The table lists three customers: Justin Dabbie, Jens VALITON, and Nick Vaidya. Each customer has "[None]" in the Rentals column and checked boxes in the Openwater Diver and Open Water Crew-Pak columns. Below the table, there are fields for "Course Notes" (containing "WEEKEND") and "Private Course Notes". A checkbox labeled "Show on Invoice" is checked. At the bottom are navigation buttons: "<< Previous", "Next >>", "Finish", and "Cancel".

Customer	Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form. If you have created a group, each member of the group will be listed here.
Rentals	You can use the rentals option to quickly Create a New Rental Booking for each customer.
Course Name	The course name is displayed here confirming the customer's enrolment in the course. To un-enroll a customer, do not uncheck the course name here, you must go back to the Select Customers tab and remove the customer.
Other Options	Any other options you have selected as part of the package will be displayed here as a series of columns containing check boxes. Put a tick in the checkbox for each option you wish to sell to the customer. When you set up the package

	in Stock Items, if you ticked the <i>Checked?</i> box, the option will be ticked by default.
Course Notes	Any course Notes that were created when you were Creating a New Course (See Section 9.1.1.Creating a New Course) are displayed here. These course Notes are not editable on this form.
Show On Invoice	If you do not want the course Notes to print on the invoice, uncheck the <i>Show on Invoice</i> checkbox.

Requirements

Equipment	Quantity	Size Options
Airtanks	[Any]	10 Litter (red), 12 Litter, 15 Litter, 19 Litter
Bags	[Any]	Large
BCDs	[Any]	Extra Large, Extra Small, 8-10, 12-14
Books	[Any]	5, 10 (red), 7, 9
Cameras	[Any]	
Computers	[Any]	
Drysuits	[Any]	Small, Medium, Medium/Large, Large
Fins	[Any]	Medium Large, 6, Small (red), Large/E Large
Flash Lights	[Any]	
Foot Fins	[Any]	

Wind 10/15/2006

<< Previous Next >> Finish Cancel

You can use the Requirements tab to identify any equipment requirements the customer has for this specific course. For example, if the customer needs to rent a piece of equipment, you would note the size here. Later, when you are viewing the Course details in Courses, you will be able to see (and print) the equipment requirements for each customer. Click on the appropriate size box next to an equipment item to highlight it in red or click on the **Any** box if any size will do and/or make a specific note in the Notes field.

Note: this process does not create a rental booking. Instead, it is intended for use by those stores/resorts with bulk equipment requirements that are not interested in booking specific items to customers but rather in making sure the correct sized items are assigned to the course. However, you can use selected profile as a basis for a rental booking if you wish. I.e. when you create a Rental Booking you can use the Profile button to aid in selecting items, and those sizes you chose here will be indicated.

Course Price

Use this form to confirm the course pricing and deposit amounts. Highlight the customer whose pricing information you wish to review on the left hand side of the form (if only one customer is listed you do not need to do this). The information on the right hand side of the form will update based on the specific customer you have selected. The information you enter here will be committed to the invoice when you click the **Finish** button.

Customer: Justin Dabbie

Introduction | Select Courses | Select Customer(s) | Options | Requirements | **Course Price**

AOW 30Jan2015 12:00 Beep (5)

Customer

- Justin Dabbie
- Jana VALITON
- Nick Valdya

Course Price: Justin Dabbie

	Pre-Tax	Tax	Total	Amount Being Paid
<u>Course Price</u>	\$257.30	\$21.23	\$278.53	\$278.53
<u>Deposit</u>			\$0.00	
Already Paid	\$0.00	\$0.00	\$0.00	
		Owes	\$278.53	

Enrollment

Status:

☐ Pre-Registration?

☐ Referred? From Center #

Certification Type

☐ e-Learner

☐ Standard

☐ Touch

Customer Notes ☒ Show on Invoice

Copy to all customers on this Booking

<< Previous | Next >> | Finish | Cancel

Customer

Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form. If you have created a group, each member of the group will be listed here. If you click on a different customer in the list, the details on the right will change to show information for the newly selected customer. E.g. if one customer gets cheaper courses by virtue of their customer type (e.g. club member) then you'll see the prices change when that customer is selected.

Course Price

The Amount Being Paid will Default to either the full course price or the deposit amount based on the options you set when Setting Course Options (See Section 4.3.5.Courses Options). You can toggle between options by clicking on the **Course Price** and **Deposit** field labels - shown in blue.

Course Price Pre-Tax

The Course Price before tax is displayed. The course price is the amount of the course and any options that you have packaged with the course. For example, if you are selling an Equipment Specialty course for \$149 and have packaged an Encyclopedia of Recreational Diving for \$49.95 together with the course, the course price will be \$198.95. The cost of any rentals is not included in the course price.

If you want to charge the customer a different amount, mouse over to the field and press the Space Bar (or any key other than the Enter key or Tab key).

The following form will appear allowing you to change the price of individual line items.

Stock Item	Price	Tax	Tax Band
Equipment Specialty	\$149.00	\$7.45	Standard Rate
Encyclopedia of Recreational	\$49.95	\$2.50	Standard Rate

Customer Tax Exemption(s)	Sub-Total	\$198.95
	Tax	\$9.95
Customer Type(s)	Total	\$208.90

OK Cancel

You can edit either the price field (unit price before tax) or the total price field on this form. Changing one price field will automatically adjust the other. All other fields are shown for your information. This will only change the amount this customer is due to pay, it will not affect the amount other customers pay for the course.

Tax	The amount of tax on the course and all options is displayed. EVE automatically calculates this (based on the tax band of the items' Stock Type). Tax cannot be overridden here. If you need to edit the tax amount, you will be able to do this in the shopping basket once you have completed the course enrolment form.
Total	The total course price based on the sum of the course price and the tax. If you want to charge the customer a different total amount, mouse over to the field and press the Space Bar (or any key other than the enter key or tab key). The Event Price form will be shown as described in Course Price Pre-Tax above.
Amount Being Paid	If you choose the <i>Set Default Amount Being Paid to the Full Price of the Course</i> when Selling Courses option when Setting Course Options (See Section 4.3.5.Courses Options), then this amount will be set to the total course price. If you choose the <i>Set Default Amount Being Paid to the Deposit Amount</i> when Selling Courses option when Setting Course Options (See Section 4.3.5.Courses Options), this amount is set to the deposit amount that you identified when creating the stock item. If you have already enrolled the customer in this course and have collected either the deposit or a partial payment for the course, the amount being paid will default to the balance remaining on the course.
Deposit	The Amount Being Paid will default to either the full price or the deposit amount based on the options you set when Setting Course Options (See Section 4.3.5.Courses Options). You can toggle between options by clicking on the Course Price and Deposit field labels.
Already Paid Pre-Tax	If you have already enrolled the customer in this course and have collected either the deposit or a partial payment for the course, the amount of the pre-tax amount paid would be displayed here.
Already Paid Tax	If you have already enrolled the customer in this course and have collected either the deposit or a partial payment for the course, the tax portion of the amount already paid would be displayed here.
Already Paid Total	If you have already enrolled the customer in this course and have collected either the deposit or a partial payment for the course, the total amount (pre-tax and tax) paid would be displayed here.
Owes	This is the total course price less any amount already paid. It does not reflect

	any payments being made on this invoice.
--	--


	Note: this is not any debit balance a customer may have on his or her account for previous purchases. The Owes field refers specifically to the amount owing on this particular course.
--	---

You can use this combination of price fields to offer course discounts and accept installment payments for courses. For example:

Example: a customer enters the store and wants to enroll on an Advanced Open Water course that usually costs \$350 and has a deposit of \$50. You choose to charge him a reduced fee of \$250. He is going to make a down payment of \$50 now and pay the balance of \$200 later. You should take the following steps:

- ❖ Enroll the customer: search for the customer in the Customer Search box section and follow the steps for Selling Courses outlined above; enter customer details, select the course type in Stock Items, choose a specific course date and highlight the options you want to sell. Course Price will read \$350, Deposit will read \$50, Already Paid will read \$0, Owes will read \$350, and Amount Being Paid will read \$50 or \$350 depending on the course options you have set.
- ❖ Change the Course Price to \$250 and click on the **Deposit** field label. Amount Being Paid will now read \$50.
- ❖ Click **Finish** and finish off the invoice in the usual way by entering payment details and clicking **Save Invoice**. The customer is now enrolled on the course and marked as having paid \$50. You can view the course in the Courses Module and the customer's name and amount paid will appear on the Customers tab.

When the customer is ready to pay the balance, you need to take the following steps:

- ❖ Follow the steps to enroll the customer. When the Select Courses tab is shown, the course that the customer is already registered on will have a  symbol next to it. Select the customer's course. Course Price will read \$250 (i.e. the reduced amount you decided to charge this customer), Deposit will read \$50, Already Paid will read \$50, Owes will read \$200 (= \$250 - \$50), Amount Being Paid will read \$200 (=Owes).
- ❖ Click **Finish** and finish off the invoice in the usual way by entering payment details and clicking **Save Invoice**. The customer is now marked as having paid the full amount (\$250) for the course.
- ❖ The name of the customer enrolled on the course appears along with the course description in the shopping basket.

Note: if several customers are to be added to one invoice (for example, a family, where a parent will be paying), perform the same steps, but before you click **Finish** on the Course Price tab, select each customer individually and repeat the above steps.

Enrolment

Status	EVE comes preloaded with several options for Enrolment Status. Generally you will want to use the Enrolled status to register a customer in a course, however, you may choose to waitlist a customer for a number of reasons, for example, when a course is full but there is the potential for a cancellation or if you are considering extending the maximum number of the course if you can secure additional staffing. You may also have the customer provisionally enrolled in a course. You may wish to enroll customers provisionally for a number of reasons, for example, if there is a potential medical issue or if the customer is unable to commit to the schedule.
Pre-Registration?	If the customer has pre-registered for the course with PADI you can check the Pre-Registration box.
Referred?	If the customer was referred from another dive center you can put a checkmark and enter the PADI number of the referring center.
From Center #	

Certification Type	Choose the type of certification. At time of writing this is one of Standard, e-Learner and Touch. The value chosen is important since it tells EVE whether to expect a Registration code to be present before a PIC is submitted for the student when they complete their course. i.e. if Standard is chosen, EVE will not expect a Registration code to be present. If e-Learner or Touch is chosen, EVE will expect a Registration code to be present. You can enter the Registration code on the PIC Online tab of the Certification form.
Customer Notes	Enter Customer Notes relating to the customer on the course. The text is specific to this customer and this course. The text you enter can be viewed later in the Customers section of the Courses Module and will print out on the Course and Customer Details report.
Show On Invoice	Check the Show on Invoice box if you want the Customer Notes you entered about the course, to be copied to the customer's invoice. You may have entered details of any special arrangements for the customer, etc.

When you are satisfied with the information you have entered on the Booking Wizard form you can click the **Finish** button. You will be taken back to the invoice and the customer will be registered in the course with the options you have selected. The shopping basket will have one item for the course the customer is registered in and one item for each option the customer has purchased. If you set up a rental contract, an item for the rental will also be shown in the shopping basket.

You are now ready to Receive Payment.

6.1.5 Selling Trips

There are two primary types of trips in EVE - Vacations and Day Trips. Typically a vacation will be a multi-day holiday that may include transportation, accommodation, meal packages, and/or excursions. Trips are set up to Destinations within EVE. A Day Trip (or Charter) is typically a one-day adventure that is focused on the dive excursion. Day trips may be sold on Boats (if you are selling a spot on a specific charter operator or using your own boat) and/or to Destinations (where you may use one of several charter operators or boats but the destination remains the same).

When Selling Trips, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

You will use this process when you are Selling Trips for the first time to a customer or if the customer is already enrolled on a trip and you are collecting the balance of payment (if they only paid a deposit for the trip).

Stock Item Search

Stock Item Search

General Dates Retail Price

Stock Type: **Trips** Sub Stock Type:

Manufacturer: Supplier:

Description: A* Store Stock #: A*

Barcode #: A Manuf. Stock #: A*

Primary Color: Secondary Clr:

Size: ID:

Search Clear New Open Close

Stock Item	Stock #	Stock Type	Manufacturer	Retail Price
Bonaire Diver, No Air	Bonaire ...	Trips	Diving Inc	£100.00
Bonaire Snorkeler no Air	Bonaire ...	Trips	Diving Inc	£100.00
Bonaire Snorkeler w/ Air	Bonaire ...	Trips	Diving Inc	£100.00
Budget Room	Bud	Trips	Diving Inc	£1,482.00
Club Room	Club	Trips	Diving Inc	£1,718.00
Florida Keys Jan 2007	Florida K...	Trips	Diving Inc	£100.00
Florida Keys Jan 2007-Single Su...	Keys-Sln...	Trips	Diving Inc	£100.00

Count = 48. [Do Not Show Unavailable](#)

When you select trips in the Stock Items search box, the search results show all of the Stock Items associated with trips run at your dive center. These may be trips on a specific boat, to a specific destination or where a specific Day Trip or Vacation Trip has been created. When you add one of them to the shopping basket, the Booking Wizard form is shown with the Select Trips tab open so you can enroll the customer on one or more trips. Note: if the Booking Wizard form is not shown, the trip stock item is not correctly linked to a Boat, Destination or specific Trip on the Links tab of the Stock Item form.

Select Trip - Vacation

If you have selected a vacation trip, the following form will appear.

Booking Wizard

Customer: Robert Fairlie

Introduction Select Trips Select Customer(s) Options Requirements Event Price

Event Type: **Trips** ☐ Include Complete?

Destination: **Bognor**

☐ Show Calendar?

Available Trips: Double click to add to Assigned list. Key: Customer already enrolled = ●

Trip #	Start Date	Max. Places	Places Available	Enrolled	Waiting List	Provisional
Pemb 16/07/20...	7/16/2008 7...	15	15	0	0	0
Bog 19/10/2008	10/19/2008 ...	15	12	3	0	0
Bog 22/10/2008	10/22/2008 ...	15	2	13	0	0
Bog 09/09/2008	9/9/2008 6.0...	15	15	0	0	0
Bog 10/10/2008	10/10/2008 ...	15	15	0	0	0
Bog 01/12/2008	12/9/2008 6...	15	15	0	0	0

Assigned Trips


☒ Bog 09/09/2008 (15)

New Trip Remove [Store View: \[CompoundStore\]](#)

<< Previous Next >> Finish Cancel

Event Type

This is read-only and indicates whether you are selling a Trip, Day-Trip or Course

Destination	The Destination that the stock item you chose is linked to will display here. E.g. if you created a Stock Item and indicated it will be used to sell places on trips to Papua New Guinea, Papua New Guinea will be shown.
Include Complete	Put a check mark in the box if you want to see trips that have already been completed in the list. This might be useful if you are taking payment for the trip after it happened.
Show Calendar?	If checked, a Calendar will be shown and trip(s) (that can be sold using the stock item being sold) will be shown as colored boxes on the calendar. If not checked, a list of trips will be shown.
Trips List	<p>The following information will be shown in the Trips list:</p> <p>Trip #: unique identifier for the trip.</p> <p>If the specific trip you wish to enroll the customer on is not shown, you may create a new trip by clicking the New Trip button. You can Create a New Trip by entering the trip details.</p> <p>If the customer is already enrolled on a trip of this type, a “” symbol will be displayed next to the trip number.</p> <p>If the trip is full, it will be displayed with a shaded red bar over the trip.</p> <p>Start Date: The start date of the trip is displayed.</p> <p>Max Places: The maximum number of customers allowed on the trip. Customers may be enrolled on a trip, even when the maximum number will be exceeded if you have the Can Exceed Max Number of People on Trips privilege. When selling places on a trip, EVE will prompt you if the maximum # is exceeded.</p> <p>Places Available: Next to each trip # is an indication of the number of places available (based on the maximum number of customers you set in the Trips Module and the number of customers already enrolled).</p> <p>Enrolled: The number of customers enrolled on the trip.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p> <p>Waiting List: The number of customers who have been waitlisted for this trip. You may wish to waitlist a customer on a trip for a number of reasons, for example, when a trip is full but there is the potential for a cancellation or if you are considering extending the maximum number for the trip if you can secure additional staffing.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p> <p>Provisional: The number of customers who have provisionally enrolled on a trip. You may wish to enroll customers provisionally for a number of reasons, for example, if there is a dependency on securing rental gear prior to the trip.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken (section 4.4.18) and will therefore affect the places available.</p> <p>Trip Notes: Any Trip Notes that were set up when this trip was created are displayed.</p>

Once you have identified which Trip the customer wants to enroll on, double click on it (or select it and then click the + button) to add it to the 'Assigned Trips' list. You can add multiple trips to the Assigned List if you wish. If you add a trip to the Assigned list by mistake, select it and then click Remove.

Right click on a Trip to show a popup menu that has the following options.

Open	You can Open a specific trip to look at additional details about the trip including the names of the customers enrolled on it, the options that have been purchased or the full schedule.
Documents	Click the Documents option to open a form showing pre-defined Documents relating to the trip, for example, disclaimers or waivers. You can define which Documents relate to which trip in Destinations or Stock Items. Click the Print button to print any selected forms, so that the customer can complete / sign all documentation immediately.

Select Trip(s) - Day Trip

If you have selected a Day Trip the following form will appear.

Booking Wizard

Customer: Robert Fairlie

Introduction | **Select Day Trips** | Select Customer(s) | Options | Requirements | Event Price

Event Type: Day Trips ☐ Include Complete?

Destination: Bognor

Boat: Spare Rib

☒ Show Calendar?

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Year: 2008 Month: December

New Day Trip Remove

Available Day Trips: Double click to add to Assigned list. +

Trip #	Max. Places	Places Avail..	E
SR 01/12/2008 AM	6	6	0
SR 01/12/2008 PM	6	6	0

Assigned Day Trips


SR 01/12/2008 PM (6)

Store View | CompoundStore

<< Previous Next >> Finish Cancel

The Select Day Trips tab on the Booking Wizard form has three primary sections - information at the top about the destination and/or boat along with the trips this customer is signing up for, a calendar at the left of the form and specific trip information on the right of the form.

Destination	If the stock item you chose is linked to a Destination it will be shown here.
Boat	If the stock item you chose is linked to a Boat it will be shown here.
Calendar	Days where there is at least one trip will be shown in blue. Days where there are no trips will be shown in gray. If you click on a date, a list of trips on that date will be displayed on the right of the form.

Available Day Trips list	<p>The following information will be shown in the Available Day Trips list:</p> <p>Trip #: The trip number of all incomplete trips for the destination and/or boat on the calendar date selected will be displayed.</p> <p>If the specific trip you wish to enroll the customer on is not shown, you may create a new trip by clicking the New Trip button.</p> <p>If the customer is already enrolled in a trip on the date selected, a “” symbol will be displayed next to the trip #.</p> <p>If the trip is full, it will be displayed with a shaded red bar over the trip details.</p>
	Start Date: The start date of the trip is displayed
	Max Places: The maximum number of customers allowed on the trip. Customers may be enrolled on a trip, even when the maximum number will be exceeded if you have the Can Exceed Max Number of People on Trips privilege. When selling places on a trip, EVE will prompt you if the maximum # is exceeded.
	Places Available: Next to each trip # is an indication of the number of places available (based on the maximum number of customers you set in the Trips Module and the number of customers already enrolled).
	<p>Enrolled: The number of customers enrolled on the trip.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken and will therefore affect the places available.</p>
	<p>Waiting List: The number of customers who have been waitlisted for this trip. You may wish to waitlist a customer on a course for a number of reasons, for example, when a trip is full but there is the potential for a cancellation or if you are considering extending the maximum number for the trip if you can secure additional staffing.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken and will therefore affect the places available.</p>
	<p>Provisional: The number of customers who have provisionally enrolled on a trip. You may wish to enroll customers provisionally for a number of reasons, for example, if there is a dependency on securing rental gear prior to the trip.</p> <p>For each Enrolment Status, you can determine whether or not the status Counts Towards Places Taken and will therefore affect the places available.</p>
	Trip Notes: Any trip Notes that were set up when this trip was created are displayed.

Once you have identified which Trip the customer wants to enroll on, double click on it (or select it and then click the + button) to add it to the ‘Assigned Day Trips’ list. You can add multiple trips to the Assigned List if you wish. If you add a trip to the Assigned list by mistake, select it and then click Remove.

Right click on a Trip to show a popup menu that has the following options.

Open	You can Open a specific trip to look at additional details about the trip including the names of the customers enrolled on it, the options that have been purchased or the full schedule.
-------------	--

Documents	<p>Click the Documents option to open a form showing pre-defined Documents relating to the trip, for example, disclaimers or waivers. You can define which Documents relate to which trip in Destinations or Stock Items.</p> <p>Click the Print button to print any selected forms, so that the customer can complete / sign all documentation immediately.</p>
------------------	--

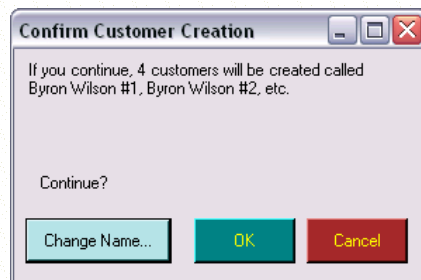
Select Customers

The screenshot shows the 'Booking Wizard' window, specifically the 'Select Customer(s)' tab. At the top, the 'Customer' field contains 'Robert Fairlie'. Below the tabs, there are two radio button options: 'The Customer is buying the Day Trip for the following People' (which is selected) and 'The Customer is block-booking the Day Trip'. Under the first option, a list box contains three names: 'Robert Fairlie' (highlighted in red), 'Neil Gafan', and 'Steven Gabbitus'. To the right of the list box are buttons: 'Add Customer(s)', 'Add Group', 'Remove Customer(s)', 'Open Customer', and 'Create a Group'. Below the second radio button, there is a 'Places' field with the value '10' and two arrows (increase/decrease), and a 'Group Name' field with the value 'Robert Fairlie'. At the bottom of the window are navigation buttons: '<< Previous', 'Next >>', 'Finish', and 'Cancel'.

You can identify all of the customers this customer is purchasing the trip for on the Select Customers tab. For example, if a family is registering on a trip, you may create only one invoice but have multiple customers enrolled. The customer you selected on the invoice will be automatically displayed in the list box and will be highlighted in red. You can:

Add Customer	Use the Add Customer button to add additional customers to the trip and to list them all on this invoice. The Customer Search form will be displayed.
Remove Customer	Highlight a customer and click the Remove Customer button to remove a customer from the trip and from the invoice if they were added in error.
Open Customer	Highlight a customer and click the Open Customer button to review the customer details. You could use this form to confirm contact details for the customer or check for prerequisite certifications.
The Customer Is Block Booking The Trip	Choose the 'Customer is Block Booking...' option if the customer is booking multiple spots on the trip for other customers who will be identified at a later date. For example, if you are running a corporate program and the business is committing to fill the boat with 12 customers but does not yet have the names of the individuals, they can block book a trip to hold the places.
Places	Choose the number of places the customer is block booking. You can click the Increase and/or Decrease button to change the number or type a value directly into the field.
Group Name	When you have finished entering information on this page and click Next to

move to the next page, you will be asked to confirm customer creation.



EVE will create one customer for each place you have block-booked using the invoice customer's name as a place marker. You can change the customer names using the **Change Name** button if you are not satisfied with the default. It will change the name of all the new customers you are creating.

Options

If you have packaged items together with the trip (section 0), the package items will be presented on the options form. This way you can easily ask the customer if they would like to purchase the additional items required for the trip.

The Selling Packages process outlines the steps you would take to create and sell a package.

A screenshot of the "Confirm Day-Trip Purchase" window. At the top, there's a "Customer" field with "Glenn Petersen" entered. Below it are tabs: "Select Trip(s)", "Select Customer(s)", "Options", "Requirements", and "Trip Price". The "Options" tab is active. A message says: "If there are options defined for this Day Trip, put a tick against each one the customer wants to purchase." Below this is a table with columns: "Customer", "Rentals", "Ogden Point Diving", and "EANx Fill". The first row shows "Glenn Petersen", "#(New #1)", a checked box for "Ogden Point Diving", and a checked box for "EANx Fill". At the bottom, there's a "Trip Notes" section with a checked box for "Show on Invoice". The footer shows the date "OPD 16/04/2006" and navigation buttons: "<< Previous", "Next >>", "Finish" (green), and "Cancel" (red).

Customer	Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form. If you have created a group, each member of the group will be listed here.
Rentals	You can use the rentals option to quickly Create a New Rental Booking for each customer.
Trip Name	The trip name is displayed here confirming the customer's enrolment in the trip. To un-enroll a customer, do not uncheck the trip name here, you must go back to the Select Customers tab and remove the customer.
Other Options	Any other options you have selected as part of the package will be displayed here as a series of columns containing check boxes. Check the checkbox for each option you wish to sell to the customer. When you set up the package in Stock Items, if you selected the <i>Checked?</i> checkbox, the default will be that the checkbox is checked and ready for the customer to purchase.

Trip Notes	Any trip Notes that were created when you were Creating a New Trip are displayed here. These comments are not editable from this form.
Show On Invoice	If you do not want the Trip Notes to print on the invoice, uncheck the <i>Show on Invoice</i> checkbox.

Requirements

Equipment	Size	10 Litre	12 Litre	15 Litre	19 Litre
Airtanks	[Any]	10 Litre			
Bags	[Any]	Large			
BCDs	[Any]	Extra Large	Extra Small	8-10	12-14
Books	[Any]	5	10	7	9
Cameras	[Any]				
Computers	[Any]				
Drysuits	[Any]	Small	Medium	Medium/Large	Large
Fins	[Any]	Medium Large	6	Small	Large/E Large
Flash Lights	[Any]				
Foot Fins	[Any]				

Wind 10/15/2006

<< Previous Next >> Finish Cancel

You can use the Requirements tab to identify any equipment requirements the customer has for this specific trip. For example, if the customer needs to rent a specific piece of equipment, you would note the size here. Later, when you are viewing the Trip details in Trips, you will be able to see (and print) the equipment requirements for each customer. Click on the appropriate size box next to an equipment item to highlight it in red or click on the **Any** box if any size will do and/or make a specific note in the Notes field.

Note: this process does not create a rental booking. Instead, it is intended for use by those stores/resorts with bulk equipment requirements that are not interested in booking specific items to customers but rather in making sure the correct sized items are assigned to the trip. However, you can use selected profile as a basis for a rental booking if you wish. I.e. when you create a Rental Booking you can use the Profile button to aid in selecting items, and those sizes you chose here will be indicated.

Trip Price

Use this form to confirm the trip pricing and deposit amounts. Highlight the customer whose pricing information you wish to review on the left hand side of the form (if only one customer is listed you do not need to do this). The information on the right hand side of the form will update based on the specific customer you have selected. The information you enter here will be committed to the invoice when you click the **Finish** button.

Customer: RICHARD LA POSTA

Introduction | Select Trip(s) | Select Customer(s) | Options | Requirements | **Trip Price**

	Pre-Tax	Tax	Total	Amount Being Paid
Trip Price	\$81.00	\$4.05	\$85.05	\$85.05
Deposit			\$10.00	
Already Paid	\$0.00	\$0.00	\$0.00	
Owes			\$85.05	

☒ Pickup Required?
 Hilton 8:00:00 PM Volkswagen

Enrollment
 Status: Enrolled
☐ Waiver Signed?

Customer Notes ☒ Show on Invoice

Wind 10/15/2006

<< Previous Next >> Finish Cancel

Customer Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form. If you have created a group, each member of the group will be listed here.

Trip Price The Amount Being Paid will Default to either the full trip price or the deposit amount based on the options you set when Setting Trip Options (See Section 4.3.6. Trips Options). You can toggle between options by clicking on the **Trip Price** and **Deposit** field labels - shown in blue.

Trip Price Pre-Tax The Trip Price before tax is displayed. The trip price is the amount of the trip and any options that you have packaged with the trip. For example, if you are selling a boat trip for \$100 and have packaged an optional nitrox air fill for \$15 together with the trip, the trip price will be \$115. The cost of any rentals is not included in the trip price.

If you want to charge the customer a different amount, mouse over to the field and press the Space Bar (or any key other than the Enter key or Tab key).

The following form will appear allowing you to change the price of individual line items.

EventPrice

Stock Item	Price	Tax	Tax Band
Ogden Point Diving	\$110.00	\$5.50	Standard Rate
EANx Fill	\$15.00	\$0.75	Standard Rate

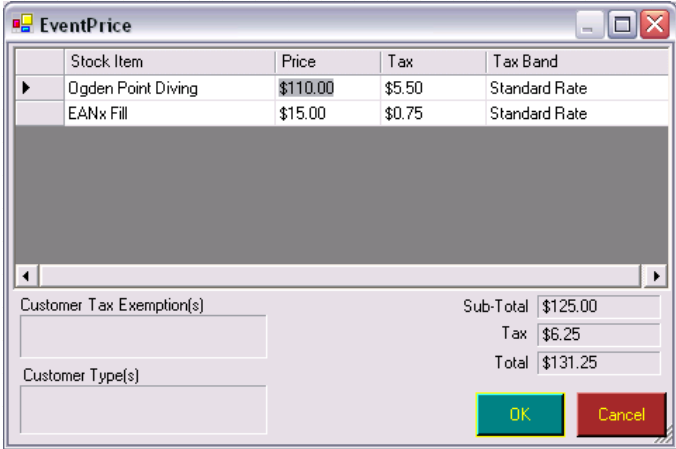
Customer Tax Exemption(s)

Customer Type(s)

Sub-Total \$125.00
 Tax \$6.25
 Total \$131.25

OK Cancel

You can edit either the price field (unit price before tax) or the total price field

	<p>on this form. Changing one price field will automatically adjust the other. All other fields are shown for your information. This will only change the amount this customer is due to pay, it will not affect the amount other customers pay for the trip.</p>
Tax	<p>The amount of tax on the trip and all options is displayed. EVE automatically calculates this (based on the tax band of the items' Stock Type). Tax cannot be overridden here. If you need to edit the tax amount, you will be able to do this in the shopping basket once you have completed the trip enrolment form.</p>
Total	<p>The total trip price based on the sum of the trip price and the tax.</p> <p>If you want to charge the customer a different total amount, mouse over to the field and press the Space Bar (or any key other than the enter key or tab key).</p> <p>The following form will appear allowing you to change the price of individual line items.</p>  <p>You can edit either the price field (unit price before tax) or the total price field this form. Changing one price field will automatically adjust the other. All other fields are shown for your information. This will only change the amount this customer is due to pay, it will not affect the amount other customers pay for the trip</p>
Amount Being Paid	<p>If you choose the <i>Set Default Amount Being Paid to the Full Price of the Trip When Selling Trips</i> option when Setting Trip Options (See Section 4.3.6.Trips Options), then this amount will be set to the total trip price.</p> <p>If you choose the <i>Set Default Amount Being Paid to the Deposit Amount When Selling Trips</i> option when Setting Trip Options (See Section 4.3.6.Trips Options), this amount is set to the deposit amount that you identified when creating the stock item.</p> <p>If you have already enrolled the customer in this trip and have collected either the deposit or a partial payment for the trip, the amount being paid will default to the balance remaining on the trip.</p>
Deposit	<p>The amount being paid will default to either the full price or the deposit amount based on the options you set when Setting Trip Options (See Section 4.3.6.Trips Options). You can toggle between options by clicking on the Trip Price and Deposit field labels.</p>
Already Paid Pre-Tax	<p>If you have already enrolled the customer in this trip and have collected either the deposit or a partial payment for the trip, the amount of the pre-tax amount paid would be displayed here.</p>


Already Paid Tax	If you have already enrolled the customer in this trip and have collected either the deposit or a partial payment for the trip, the tax portion of the amount paid would be displayed here.
Already Paid Total	If you have already enrolled the customer in this trip and have collected either the deposit or a partial payment for the trip, the total amount (pre-tax and tax) paid would be displayed here.
Owes	<p>This is the total trip price less any amount already paid. It does not reflect any payments being made on this invoice.</p> <p>Note: this is not any debit balance a customer may have on his or her account for previous purchases. The Owes field refers specifically to the amount owing on this particular trip.</p>

You can use this combination of price fields to offer trip discounts and accept installment payments for trips. For example:

Example: a customer enters the store and wants to enroll on a Vacation trip that usually costs \$350 and has a deposit of \$50. You choose to charge him a reduced fee of \$250. He is going to make a down payment of \$50 now and pay the balance of \$200 later. You should take the following steps:

- ❖ Enroll the customer: search for the customer in the Customer Search box section and follow the steps for Selling Trips outlined above; enter customer details, select the Trip type in Stock Items, choose a specific trip date and highlight the options you want to sell. Trip Price will read \$350, Deposit will read \$50, Already Paid will read \$0, Owes will read \$350, and Amount Being Paid will read \$50 or \$350 depending on the trip options you have set.
- ❖ Change the Trip Price to \$250 and click on the **Deposit** field label. Amount Being Paid will now read \$50.
- ❖ Click **Finish** and finish off the invoice in the usual way by entering payment details and clicking **Save Invoice**. The customer is now enrolled on the trip and marked as having paid \$50. You can view the trip in the Trips Module and the customers name and amount paid will appear on the Customers tab.

When the customer is ready to pay the balance, you need to take the following steps:

- ❖ Follow the steps to enroll the customer. When the select trips tab is shown, the trip that the customer is already registered on will have a  symbol next to it. Select the customer's trip. Trip Price will read \$250, Deposit will read \$50, Already Paid will read \$50, Owes will read \$200 (= \$250 - \$50), Amount Being Paid will read \$200 (=Owes).
- ❖ Click **Finish** and finish off the invoice in the usual way by entering payment details and clicking **Save Invoice**. The customer is now marked as having paid the full amount (\$250) for the trip.
- ❖ The name of the customer enrolled on the trip appears along with the trip description in the shopping basket.

Note: if several customers are to be added to one invoice (for example, a family, where a parent will be paying), perform the same steps, but before you click **Finish** on the trip price tab, select each customer individually and repeat the above steps.

Enrolment

Status	EVE comes preloaded with several alternatives for Enrolment Status. Generally you will want to use the Enrolled status to register a customer in a trip, however, you may choose to waitlist a customer for a number of reasons, for example, when a trip is full but there is the potential for a cancellation or if you are considering extending the maximum number of the trip if you can secure additional staffing. You may also have the customer provisionally enrolled in a trip.
Waiver Signed?	Use this checkbox to indicate if the customer has signed a waiver for this trip.

Customer Notes	Enter Customer Notes relating to the customer on the trip. The text is specific to this customer and this trip. The text you enter can be viewed later in the Customers section of the Trips Module and will print out on the Trip and Customer Details report.
Show On Invoice	Check the Show on Invoice box if you want the Customer Notes you entered about the trip when it was set up, to be copied to the customers invoice. You may have entered details of start times, locations, etc.

When you are satisfied with the information you have entered on the Confirm Trip Purchase forms you can click the **Finish** button. You will be taken back to the invoice and the customer will be registered in the trip with the options you have selected. The shopping basket will have one item for the trip the customer is registered in and one item for each option the customer has purchased. If you set up a rental contract, an item for the rental will also be shown in the shopping basket.

You are now ready to Receive Payment.

6.1.6 Selling Rental Bookings

When Selling Rental Bookings, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

You will use this process when you are selling either a new Rental Booking or one that has already been set up when you created a New Rental Booking.

Stock Item Search

Stock Item Search

General | Dates | Retail Price

Stock Type: **Equipment Rental** Sub Stock Type:

Manufacturer: Supplier:

Description: Store Stock #:

Barcode #: Manuf. Stock #:

Primary Color: Secondary Clr:

Size: ID:

Buttons: Search, Clear, New, Open, Add, Close

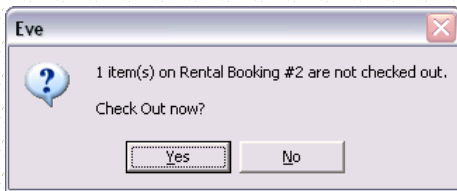
Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price
New Rental Booking	RENTAL	Equipment Rental	Ocean Pro Adv...	1	
Rental Booking #2	RB#2	Equipment Rental	Ocean Pro Adv...	1	\$699.30
Rental Booking #3	RB#3	Equipment Rental	Ocean Pro Adv...	1	\$105.00
Rental Booking #4	RB#4	Equipment Rental	Ocean Pro Adv...	1	\$105.00

Found: 4 Do Not Show Unavailable

When you select Equipment Rental in the Stock Items search box, the search result shows all of the existing unpaid Rental Bookings for the customer specified on the Invoice. There is also an option to create a New Rental Booking. Double click on this to open the Rental Booking form so you can create a new rental booking from scratch. When you save that booking, it will be added to the list on the Stock Item Search form.

If the rental booking has already been created, select it in the list and click **Add** or double click on it to add it to the invoice just like any other stock item.

If you have selected the *Show Checkout Prompt* when Setting Rental Options (See Section 4.3.7.Rentals Options), EVE will check to see if the rental gear has been checked out to the customer. If any of the items are not yet checked out, EVE will prompt you to check them out.



Depending on the *Printing Method* you have selected when Setting Rental Options (See Section 4.3.7.Rentals Options), you may be prompted to print the rental booking, it may print automatically or no action will be taken.

You are now ready to Receive Payment.

6.1.7 Selling Rental Equipment

Periodically you may want to sell off items of rental equipment. When Selling Rental Equipment, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

In advance, you will have used the Equipment form to enter all equipment in your rental department. For each piece of rental gear that is also for sale, you will create a stock item and assign it the Stock Type you identified when Setting Rental Options (See Section 4.3.7.Rentals Options). That Stock Type may be called e.g. "Rental Sell-Off"

Stock Item Search

Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price	No. In
3mm Kayak, Rental	RF PS Kayak	Rental Fleet	Ocean Pro Adv...	20268	\$99.00	
3mm Shorty, Rental	RF PS Shorty	Rental Fleet	Ocean Pro Adv...	20267	\$99.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 31	Rental Fleet	Ocean Pro Adv...	22822	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 32	Rental Fleet	Ocean Pro Adv...	22824	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 36	Rental Fleet	Ocean Pro Adv...	22828	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 02	Rental Fleet	Ocean Pro Adv...	20245	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 33	Rental Fleet	Ocean Pro Adv...	22825	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 34	Rental Fleet	Ocean Pro Adv...	22826	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 35	Rental Fleet	Ocean Pro Adv...	22827	\$449.00	
7mm Ocean Suit Full Artic w Ves...	RF DS 20	Rental Fleet	Ocean Pro Adv...	20263	\$449.00	
7mm Ocean Suit Full SGS w Ves...	RF DS 17	Rental Fleet	Ocean Pro Adv...	20260	\$499.00	

Found: 75 Do Not Show Unavailable

When you select the stock type you identified when Setting Rental Options (See Section 4.3.7.Rentals Options), the search result shows all of the rental equipment that is for sale. Select the piece(s) of gear you wish to sell and process the invoice like any other stock item.

Once sold, you will need to adjust your Equipment list in order to reflect the piece of gear is no longer part of your rental fleet. To do that, find the Equipment Item in the Data Module.

Equipment Search

The Equipment Search window has tabs for General and Details. The General tab is active, showing search criteria: Stock Type (Wetsuits & Skins), Manufacturer (Bare), Size (A*), Ref # (A*), Description (3mm Shorty M), Primary Color (A*), and Secondary Color (A*). A Search button is at the top right. Below the search criteria is a table of results:

Description	Ref #	Serial #	Stock Type	Manuf.
3mm Kayak Jane 09-10	PS 21		Wetsuits & Skins	Bare
3mm Kayak Jane 11-12	PS 15		Wetsuits & Skins	Bare
3mm Kayak Jane 15-16	PS 14		Wetsuits & Skins	Bare
3mm Kayak John ML	PS 16		Wetsuits & Skins	Bare
3mm Shorty (Women's) S(9-10)	PS 01		Wetsuits & Skins	Ocean
3mm Shorty (Women's) XS(7-8)	PS 04		Wetsuits & Skins	Ocean
3mm Shorty L	PS 11		Wetsuits & Skins	Ocean
3mm Shorty L	PS 24		Wetsuits & Skins	Ocean
3mm Shorty L	PS 32		Wetsuits & Skins	Bare
3mm Shorty M	PS 34		Wetsuits & Skins	Bare
3mm Shorty M	PS 35		Wetsuits & Skins	Bare
3mm Shorty M	PS 10		Wetsuits & Skins	Ocean
3mm Shorty ML	PS 17		Wetsuits & Skins	Ocean
3mm Shorty ML	PS 06		Wetsuits & Skins	Ocean
3mm Shorty ML	PS 33		Wetsuits & Skins	Bare

At the bottom, it says 'Found: 228' and has a 'Do Not Show Unavailable' link.

Double click on the item you just sold and put a tick in the “Unavailable” checkbox.

The Equipment: Wetsuits & Skins: PS 34 (.Rental. .Equipment.) window has tabs for General, Stores, History, Package Items, and Rental Prices. The General tab is active, showing details for item ID 8547. The Owner is Rental .Equipment. The Dates section shows Purchased (November 5, 2005), Sold (May 7, 2006), and Next Service (May 7, 2006). The Net Worth is 0. The Bypass Double Booking Check? checkbox is unchecked. The Unavailable? checkbox is checked and highlighted with a red box. The Created date is 04/05/2006 10:58:06 AM. At the bottom, there are buttons for Stock Item, New, Save, and Close.

You are now ready to Receive Payment.

6.1.8 Selling Service Bookings

When Selling Service Bookings, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

You will use this process when you are selling either a new Service Booking or one that has already been set up when you Created a New Service Booking.

Stock Item Search

Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price
New Service Booking	SERVICE	Equipment Servi...	Ocean Pro Adv...	2	
Service Booking #1	SB#1	Equipment Servi...	Ocean Pro Adv...	2	\$158.75

When you select Equipment Servicing in the Stock Items search box, the search result shows all of the existing unpaid Service Bookings for this specific customer. There is also an option to create a New Service Booking. Double click on this to open the Service Booking form so you can create a new service booking from scratch. When you save that booking, it will be added to the list on the Stock Item Search form.

If the service booking has already been created, select it in the list and click **Add** or double click on it to add it to the invoice just like any other stock item.

When a service booking is added to the shopping basket, one row is created for the booking itself, one for the Labor charge (if one was set in the Services Module) and one for the Handling charge (if one was set in the Services Module). In addition, each service part defined on the booking is added. You therefore get a complete record of the charges incurred for the service on the invoice. You can change the values of the price, tax, total, etc. in the shopping basket. If a warranty number was added to a service part on the original service booking, a discount of 100% will be applied to that service part on the invoice.

If you selected the *Automatically Apply Next Service Date and Pick Up Date* when Setting Service Options (See Section 4.3.8.Services Options), EVE will set the next service date for all items on the service booking based on the Service Period you set in Stock Types (usually a year from today) and will set the customer pick up date to today's date.

Depending on the *Printing Method* you have selected when Setting Service Options (See Section 4.3.8.Services Options), you may be prompted to print the service booking, it may print automatically or no action will be taken.

You are now ready to Receive Payment.

6.1.9 Selling Multi-Sale Items

Stock Items can be marked as multi-sale (and have a quantity associated with them). For example, you may want to set up a multi-sale item that can be used as a virtual air-fill card. When one of these items is sold, EVE automatically creates the card with a number of fills allocated equal to the quantity specified. As the customer uses each air fill you can mark off each one on the virtual card. You can use multi-sale items in other cases as well - e.g. you could sell 5 boat dives on the store's boat, etc.

When Selling Multi-Sale Items, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

Stock Item Search

Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price
Air Card	AF Card10	Air Fill	Ocean Pro Adv...	7297	\$85.00
EANx Fill	EANx Fill	Air Fill	Ocean Pro Adv...	7292	\$15.00
Unlimited Nitrox	UEANx	Air Fill	Ocean Pro Adv...	7294	\$350.00

Select the Stock Type and Stock Item that represents your multi-sale item from the Stock Item search box. A multi-sale form will be presented.

Item	A Description of the item will default to the description of the Stock Item. You can edit this description if you choose.
Purchased By	Purchased By and Recipient will both default to the customer you selected on the Invoice. You can select another customer from the Customer search box if you wish.
Recipient	
Qty	The Quantity defaults to the Multi-Sale Qty value you set when creating this Stock Item.
Purchased on Invoice	The Purchased on Invoice field will be completed by EVE when you save the Invoice.

Number	Date Used
10	10/15/2006 8:16 PM
9	
8	
7	
6	
5	
4	
3	
2	
1	

Typically the customer may want to use one of the Air Fills immediately. In this case, switch to the Items tab. A number of rows will be shown equal to the Quantity of the Multi-Sale item purchased. Set focus to the top row and press F8 to set today's date or type in a different date and click OK.

You are now ready to Receive Payment.

Multi-Sale Reminder

Each time you assign a customer to a new invoice, new quote, new rental booking or a new service booking, a reminder will pop up that This Customer owns a Multi-Sale item. This is done from a customer service perspective so you can ask the customer if (s)he wants to use their air fill card next time they get an air fill, rather than the store double charging if the employee forgets the customer has a card.

Notes

▶ The customer owns this Multi-Sale Item: Air Fill

New Open Delete Close

The pop up list box holds a list of all the multi-sale items owned by the customer. Select the one in which you are interested and click the **Open** button to open the item.

Number	Date Used	Last Updated
10	11/04/2006 3:37 PM	11/04/2006 3:37 PM
9	11/04/2006 3:37 PM	11/04/2006 3:37 PM
8	11/04/2006 3:37 PM	11/04/2006 3:37 PM
7	11/04/2006 3:37 PM	11/04/2006 3:37 PM
6	11/04/2006 3:37 PM	11/04/2006 3:37 PM
5	11/04/2006 3:37 PM	11/04/2006 3:37 PM
4	11/04/2006 3:37 PM	11/04/2006 3:37 PM
3	11/04/2006 3:37 PM	11/04/2006 3:37 PM
2	11/04/2006 3:37 PM	11/04/2006 3:37 PM
1	11/04/2006 3:37 PM	11/04/2006 3:37 PM

The same form is shown as when you sold the card so you can tick off fills used by entering today's date using the F8 key. Once the card is completely full, you can mark it Unavailable on the General tab. The multi-sale reminder will no longer be displayed.

6.1.10 Selling Packages

When Selling Packages, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

Select the Stock Item you wish to sell in the Stock Items search box. If the item is a package, the following Package form is shown.

Checked?	Stock #	Stock Item	Discount Band	Stock Type	Manufacturer
<input checked="" type="checkbox"/>	1234	Challenger Regulator		Regulators	Sherwood
<input type="checkbox"/>	Tortuga SM	Tortuga BCD Small	10% Off	BCDs	Sherwood
<input type="checkbox"/>	Tortuga Med	Tortuga BCD Med	10% Off	BCDs	Sherwood
<input type="checkbox"/>	Tortuga LG	Tortuga BCD Large	10% Off	BCDs	Sherwood
<input checked="" type="checkbox"/>	AKB 5926	Akona Evolution	15% Off	Bags	Akona

Checked?	<p>If you used the <i>Checked?</i> checkbox on the Stock Item to automatically add items to the invoice when this package was selected, the item will be pre-selected here. You can put a checkmark in the Checked field to select only those items you want to add to the invoice.</p> <p>You can click the Select All and Deselect All buttons to quickly change your selections.</p>
Stock #	The Stock # of all items in the package is listed.
Stock Item	The Stock Item Description is listed.
Discount Band	The discount band, if any, you identified in Stock Items is listed. You can edit this on the invoice if you wish once the package items have been added to the Shopping Basket.
Stock Type	The Stock Type of the item is listed.

Manufacturer

The Manufacturer of the item is listed.

Checked?	Stock #	Stock Item	Discount Band	Stock Type
<input type="checkbox"/>	F3	Sprint Shoe Fins 8-9		Fins
<input type="checkbox"/>	BH115044	Rondine Gara 2000 HI		Fins
<input type="checkbox"/>	988	Sea Star Fins 46/47 (1)		Fins
<input type="checkbox"/>	980	Sea Star Fins 27/30		Fins
<input checked="" type="checkbox"/>	981	Sea Star Fins 31/33 (1)		Fins
<input type="checkbox"/>	982	Sea Star Fins 34/35 (2)		Fins

If you specified Package Groups when you created the package stock item (see section 5.1.5), EVE will show tabs at the top of the form, one tab for each group. This can make your selection easier. You can put a check mark against item(s) on more than one tab.

Click the **OK** button when you are happy with your selections. If you have nested a package within a package, another Package Selection form will appear. Otherwise, the items will be added to the invoice. A line item will be included for the package itself along with a line item for each package item. You can edit items on the invoice.

You are now ready to Receive Payment.

6.1.11 Selling Club Memberships

When Selling Club Memberships, there are a few additional steps to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below.

Stock Item Search

Stock Item	Stock #	Stock Type	Manufacturer	ID
Air Conditioning	A/C	Miscellaneous	Scubadoo Shop	7221
Air Fare	AF	Miscellaneous	Scubadoo Travel	7205
Child Reduction	CR	Miscellaneous	Scubadoo Travel	7215
Club Membership	Club	Miscellaneous	Scubadoo Club	7278
Freight	Freight	Miscellaneous	Scubadoo Shop	7641
Late Check-Out	LtCO	Miscellaneous	Scubadoo Shop	7220

Select the Stock Type and Stock Item that represents your club membership item from the Stock Item search box. The Confirm Club Membership form will be shown.



Confirm Club Membership

New Club Membership

Customer: RICHARD LA POSTA

Club: Down Under

M/Ship Type: Gold

M/Ship #: 10

Renewal Date: Friday, June 01, 2007

OK Cancel

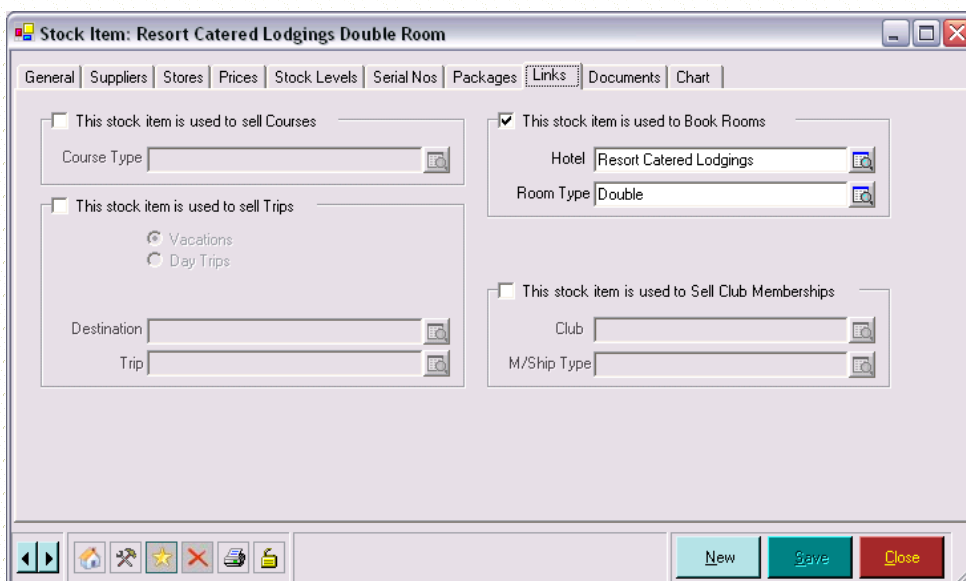
Customer	This will default to the customer you selected on the Invoice. You can select another customer from the Customer search box if you wish.
Club	The Club defaults to the Club the stock item is linked to (on the Links page of the Stock Item form)
M/Ship Type	The Membership Type defaults to the membership type the stock item is linked to (on the Links page of the Stock Item form)
M/Ship #	Type the membership number or click on the button marked with the exclamation point to have EVE assign a number for you.
Renewal Date	Choose the date that the membership will be up for renewal.

You are now ready to Receive Payment.

6.1.12 Selling Resort Reservations

When Selling Resort Reservations there are a few additional steps required to complete the sale. Unless otherwise noted, follow the steps in Selling Stock Items (See Section 6.1.1.Selling Stock Items) and then follow with the steps highlighted below. Customer is a required field when Selling Resort Reservations.

Choose Resort Reservation as the Stock Type in the stock item search box and then choose the Stock Item for your resort reservation. When setting up Stock Items, you should be sure to have the *This Stock Item is used to Book Rooms* checkbox selected and the Hotel and Room Type identified. Otherwise, you will not be able to add the booking to an invoice properly.



Stock Item: Resort Catered Lodgings Double Room

General | Suppliers | Stores | Prices | Stock Levels | Serial Nos | Packages | **Links** | Documents | Chart

☐ This stock item is used to sell Courses
Course Type: [Search]

☐ This stock item is used to sell Trips
☒ Vacations
☐ Day Trips
Destination: [Search]
Trip: [Search]

☒ This stock item is used to Book Rooms
Hotel: Resort Catered Lodgings
Room Type: Double

☐ This stock item is used to Sell Club Memberships
Club: [Search]
M/Ship Type: [Search]

New Save Close

When you select Resort Reservations in the Stock Items search box, the search result shows all of the types of rooms booked at your dive center. When you add one of them to the shopping basket, the Confirm Resort Reservation form is shown.

You can choose whether to create a new resort reservation or take the balance for an existing booking. If you are creating a New Resort Reservation, click Next to open the Select Hotel/Room tab open so you can book the customer into a particular room.

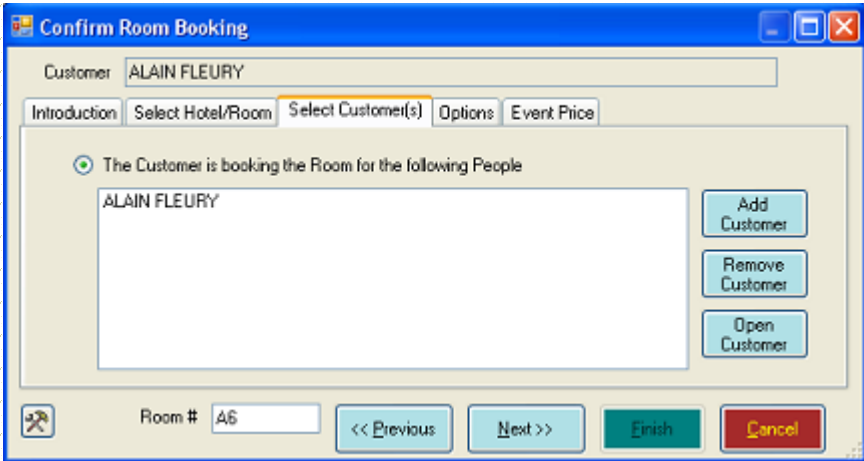
Select Hotel/Room

Room#	Room Type	Sunday 01	Monday 02	Tuesday 03	Wednesday 04	Thursday 05
A1	Single					
A5	Single		<< EASTMAN	EASTMAN	>> EASTMAN	
A6	Single	CHECK-IN		CHECK-OUT		
A7	Single					

All rooms that match the hotel and room type associated with the chosen stock item are displayed. Availability for the current month is displayed. In the diagram above, there is one prior booking for Mr. Eastman in room A5 from Monday 2nd to Wednesday 3rd October.

You can select the Check In and Check Out date by clicking on the appropriate room and date. In the diagram above, the user has indicated the new booking will commence on 1st and end on 3rd October in room A6. Use the scroll bar at the bottom of the screen to see additional dates within the current month. Click the **Forward** and **Backward** buttons at the top right of the screen to move the calendar to future (or past) months. Alternatively, you can select the Year and the Month you wish to view from the drop down list boxes.

Select Customer



You can identify all of the customers this customer is purchasing the resort reservation for on the Select Customers tab. For example, if a family is coming to the hotel, you may create only one invoice but have multiple customers booking into one room. The invoice customer will be automatically displayed in the list box. You can:

Add Customer	Use the Add Customer button to add additional customers to the resort reservation and to list them all on this invoice. The Customer Search box will be displayed.
Remove Customer	Highlight a customer and click the Remove Customer button to remove a customer if you added them in error.
Open Customer	Highlight a customer and click the Open Customer button to review the customer details. You could use this form to confirm contact details for the customer or note any special requirements the customer may have.

Options

If you have packaged items together with the resort reservation then the package items will be presented on the Options form. This way you can easily ask the customer if they would like to purchase the additional items available. You may also want to package any materials that you include in the room (for example, if you provide a free breakfast, you would add it to the resort reservation and apply a 100% discount).

The Selling Packages process outlines the steps you would take to create and sell a package.

Customer	Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form.
Hotel Name	The hotel name is displayed here confirming the customer's booking in a room. To cancel the booking, do not uncheck the hotel name here, you must go back to the Select Customers tab and remove the customer.
Other Options	Any other options you have selected as part of the package will be displayed here. Check the checkbox for each option you wish to sell to the customer. When you set up the package in Stock Items, if you selected the <i>Checked?</i> checkbox, the default will be that the checkbox is checked and ready for the customer to purchase.

Events Notes

Event Notes	Any event notes that were created when you were Creating a New Resort Reservation are displayed here. These Notes are not editable from this form.
Show On Invoice	If you do not want the Notes to print on the invoice, uncheck the <i>Show on Invoice</i> checkbox.

Event Price

Use this form to confirm the resort reservation pricing. Highlight the customer whose pricing information you wish to review on the left hand side of the form (you do not need to do this if there is only person in the list). The information on the right hand side of the form will update based on the specific customer you have selected. The information you enter here will be committed to the invoice when you click on the **Finish** button.

Customer: ALAIN FLEURY

Introduction | Select Hotel/Room | Select Customer(s) | Options | **Event Price**

Event Price	Pre-Tax	Tax	Total	Amount Being Paid
Event Price	\$150.00	\$7.50	\$157.50	\$157.50
Deposit			\$0.00	
Already Paid	\$0.00	\$0.00	\$0.00	
Owes			\$157.50	

Customer Notes: ☒ Show on Invoice

Room #: A6

<< Previous | Next >> | Finish | Cancel

Customer Each of the customers you identified on the Select Customers tab will be listed on the left hand side of the form.

Event Price The amount being paid will default to the full price.

Event Price Pre-Tax The resort reservation price before tax is displayed. The resort reservation price is the amount of the resort reservation and any options that you have packaged with the resort reservation. For example, if you are selling a resort reservation for \$63.53 and have packaged an Air Conditioning Upgrade for \$5.08 together with the resort reservation, the resort reservation price will be \$68.61.

If you want to charge the customer a different amount, mouse over to the field and press the Space Bar (or any key other than the Enter key or Tab key).

The following form will appear allowing you to change the price of individual line items.

Stock Item	Price	Tax	Tax Band
Resort Catered Lodgings Do	\$70.00	\$3.50	Standard Rate
Air Conditioning	\$4.84	\$0.24	Standard Rate

Customer Tax Exemption(s):

Customer Type(s):

Sub-Total: \$65.34
Tax: \$3.27
Total: \$68.61

OK | Cancel

You can edit either the price field (unit price before tax) or the total price field this form. Changing one price field will automatically adjust the other. All other fields are shown for your information. This will only change the amount this customer is due to pay, it will not affect the amount other customers pay for the resort reservation.

Tax	The amount of tax on the resort reservation and all options is displayed. EVE automatically calculates this (based on the tax band of the items Stock Type). Tax cannot be overridden. If you need to edit the tax amount, you will be able to do this once you have completed the resort reservation enrolment form.
Total	The total resort reservation price based on the sum of the resort reservation price and the tax. If you want to charge the customer a different total amount, mouse over to the field and press the Space Bar (or any key other than the enter key or tab key). The Event Price form will be shown as described in Event Price Pre-Tax above.
Amount Being Paid	This amount will be set to the total resort reservation price.
Deposit	This field is disabled on this form.
Already Paid Pre-Tax	If you have already invoiced the customer for this resort reservation and have collected a partial payment for the resort reservation, the amount of the pre-tax amount paid would be displayed here.
Already Paid Tax	If you have already invoiced the customer for this resort reservation and have collected a partial payment for the resort reservation, the tax portion of the amount paid would be displayed here.
Already Paid Total	If you have already invoiced the customer for this resort reservation and have collected a partial payment for the resort reservation, the total amount (pre-tax and tax) paid would be displayed here.
Owes	This is the total resort reservation price less any amount already paid. It does not reflect any payments being made on this invoice. Note: this is not any debit balance a customer may have on his or her account for previous purchases. The Owes field refers specifically to the amount owing on this particular resort reservation.

Note: if several customers are to be added to one invoice (for example, a family, where a parent will be paying), perform the same steps, but before you click **Finish** on the resort reservation price tab, select each customer individually and repeat the above steps.

Enrolment

Customer Notes	Enter Customer Notes relating to the customer's resort reservation. The text is specific to this customer and this resort reservation.
Show On Invoice	Check the Show on Invoice box if you want the Customer Notes you entered about the resort reservation when it was set up, to be copied to the customers invoice.

When you are satisfied with the information you have entered on the Confirm Resort reservation forms you can click the **Finish** button. You will be taken back to the invoice and the customer will be booked into the room with the options you have selected. The shopping basket will have one item for the resort reservation and one item for each option the customer has purchased.

You are now ready to Receive Payment.

6.2 Payments

6.2.1 Receiving Payments

Use the Payments tab to accept payment for the goods and services being purchased on the invoice.

Payment Method	<p>Pick the payment method from the pop up list box or from the Cool Bar at the right of the screen. A list of Payment Methods is shown.</p> <p>When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the Payment Methods section of the Data Module (section 4.4.26). The defaults, as delivered with EVE, are described in the next section.</p> <p>For each payment method, a line item is created on the invoice. You can edit the tendered amount for each payment method by typing into the grid. Multiple payment methods can be accepted for each invoice - e.g. if \$120 of goods are being purchased, you could add a Gift Certificate payment for \$100 and a Cash payment for \$20.</p>
Show Details	<p>Use the <i>Show Details</i> checkbox to show additional details about each individual payment line. Payment Method, Type and Tendered are always shown. With Show Details selected, columns for Account #, Payment Date, Payment #, Card #, Exp. Date, Auth #, Gift Cert #, Gift Card #, Voucher ID, TroutD, Reference and Ticket # are shown.</p>
Payment Method	Defaults to the payment method chosen above.
Type	Currently this will always read Regular Payment and cannot be changed.
Tendered	The amount tendered will automatically default to the total amount due (or remaining on the invoice). You can edit this amount if the customer will be making payments using multiple payment methods or if they are paying using a large denomination bill where change is due, etc.
Account Number	If the customer is making a payment On Account, the account number being used is displayed.

Payment Date	The system date is automatically set as the Payment Date.
Payment Number	If payment is being made by check, the check number is displayed in Payment #.
Card Number	If payment is being made by credit card, only the last 4 digits of the credit card number are shown - the other digits are replaced by asterisks.
Exp Date	If payment is being made by Credit card, the expiry date of the card is shown.
Authorization Number	If payment is being made by credit card and an authorization number has been entered, it is displayed.
Gift Certificate Number	If payment is being made by gift certificate, the gift certificate number is displayed.
Gift Card Number	If payment is being made by gift card, the gift card number is displayed.
Voucher ID	If payment is being made by Voucher, the voucher ID is displayed. No longer supported
TroutD	If you are using X-Charge or Trasport.web in conjunction with EVE to perform automatic credit card processing, these numbers are auto-generated by that software to uniquely identify the payment. They are not editable.
Reference	
Ticket Number	If you are using X-Charge or Trasport.web in conjunction with EVE to perform automatic credit card processing, EVE generates the Ticket Number for you and is an EVE specific number that uniquely identifies the payment.
Total	The total amount of the invoice including all taxes is displayed.
Tendered	The total amount of money being paid by the customer or refunded to the customer. This is set by EVE to the sum of the amounts in the Payments grid
Change/Balance	<p>If the Tendered figure is less than the Total, the text will read Balance and will be highlighted in red. Sales receipts cannot be saved unless the amount tendered is equal to or greater than the total.</p> <p>If the Tendered figure is larger than the Total, the text will read Change and will be displayed in green. EVE will treat all change as having been made in cash.</p>

6.2.2 Receiving Payment by Cash or Check

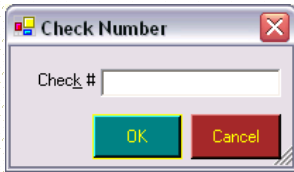
When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the Payment Methods section of the Data Module (section 4.4.26). The defaults, as delivered with EVE, for Cash or Check are:

Cash Payment

No customer is required when payments are made by Cash. No prompts will be given. The cash drawer, if attached, will open automatically when the invoice is saved.

Check Payment

No customer is required when payments are made by Check. The Check Number prompt is displayed. Check numbers are mandatory. The cash drawer, if attached, will open automatically when the invoice is saved.



Once the amount Tendered is equal to the Total, you can click the **Save** button on the invoice and you are ready to Print the Invoice.

6.2.3 Receiving Payment by Credit Card

When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the payment methods section of the Data Module. The defaults, as delivered with EVE, for Credit Cards are:

A customer is required when payments are made by Credit Card. The Credit Card prompt is displayed. The cash drawer, if attached, will open automatically when the invoice is saved. EVE comes configured to accept credit card transmissions if the software/hardware is attached and correctly configured using software from 2 third party vendors: OpenEdge and Cayan. You will need to have an account with one of those companies. At time of writing contact details are:

OpenEdge

Darrin Brown

darrin.brown@acceleratedpay.com

www.acceleratedpay.com

Phone: 801-769-6742

Fax: 702-446-8143

2436 West 700 South Pleasant Grove, UT 84062

Cayan

Kevin O'Brien

kobrien@cayan.com

www.cayan.com

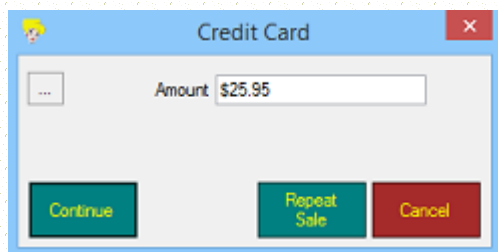
Direct 617-896-5528

One Federal Street, 2nd Floor

Boston, Massachusetts 02110

If you don't want to use integrated credit card processing (i.e. you're happy with your existing merchant account and you swipe credit cards through an external reader), you can turn off all credit card prompts in EVE using the Payment Methods form in Data so you can just enter the fact that e.g. payment of \$50 was made with Visa without having to enter credit card details.

General



When you choose to pay with a payment method that has the 'Show Card Details Prompt' option ticked, the form above will be displayed.

Amount	The Amount will be defaulted to the total amount outstanding on the invoice but, if the customer wants to split payments between credit card and e.g. cash,
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	you can change the amount to the amount (s)he wants to put on the card.
Credit / Continue	The Continue (sometimes this will read “Credit”) button will be visible if the payment method has the ‘Allow Credit Card Transmission’ option ticked. Click it to initiate a credit transaction. What happens next depends on whether you use Transport, Transport WEB, Genius or XCharge. You’ll either be presented with a form where you can swipe or type the credit card information or you’ll ask your customer to swipe/insert their card into the credit card device.
Debit	If you use Transport you’ll see a Debit button if the payment method has the ‘Allow Debit Card Transmission’ option ticked. Click it to initiate a debit transaction. A form will be displayed where you can swipe the debit card. You will need a supported pin-pad installed. If you use XCharge, Transport WEB or Genius you’ll just see a Continue button
Repeat Sale	Both XCharge and Genius return a “token” (i.e. a long number) to EVE when a credit card transaction is approved. The token is a number that represents the credit card details that were received by OpenEdge/Cayan when the transaction was submitted. The token does not contain any card details (card number, expiry date, etc.) but it acts like a pointer to the associated card details at OpenEdge/Cayan. EVE stores the token to the customer record on the database. This lets you do repeat sales (provided you have the appropriate EVE privilege) for the customer without the card being present. E.g. if you run swim lessons you could do repeat sales when each new swimming term starts.
...	If you use Genius, there may be times (e.g. when someone spills coffee on the device) that you want to manually enter credit card details on the computer rather than having the customer swipe/insert their card. You can switch between Genius and Transport WEB using the ... button at the top left of the credit card form in EVE. Money will end up in the same account regardless of whether Genius or Transport WEB is used.

The sum of all payments needs to equal amount tendered, otherwise you will receive an error message when you try to save the invoice. Once the amount Tendered is equal to the Total, you can click the **Save** button on the invoice and you are ready to Print the Invoice. If you are using automatic credit card processing, EVE will automatically save the invoice for you when you OK the credit card form provided the amount charged to the card matches the invoice total.

6.2.4 Receiving Payment by Gift Certificate

When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the payment methods section of the Data Module. The defaults, as delivered with EVE, for Gift Certificates are:

A Customer is required when payments are made by Gift Certificate. The Gift Certificate prompt is displayed. The cash drawer, if attached, will open automatically when the invoice is saved.

Gift certificates must have been issued at the Cost Center where the purchase is being made in order to be used as payment unless the *Gift Certificates/Cards Can Be Redeemed At Any Cost Center* option was checked when Setting Sales Options (See Section 4.3.2.Sales Options).

When you choose the Gift Certificates payment method, a form will be shown where you can type the Gift Certificate number if you know it. When you pause in your typing, EVE will search to see if the number exists and show the details in the gray fields. If it's the correct certificate, click OK to accept it.

Alternatively, you can click on the Select Certificate tab and that lists all gift certificates held by the selected customer. You can choose an existing, outstanding (i.e. unused) gift certificate owned by the customer.

Gift Cert. #	The gift certificate # will be displayed
Gift Cert. ID	The gift certificate ID will be displayed
Amount	The value of the gift certificate will be displayed. This value will automatically be transferred to the tendered amount on the invoice when this payment method is selected.
Expiry Date	The expiry date of the gift certificate will be displayed. By default, only certificates whose expiry date has not passed are shown.
Notes	Any notes that were created when the gift certificate was created are shown.
Include those where Expiry Date has passed	<p>By default, only certificates whose expiry date has not passed are shown. Put a check-mark in the Include those where Expiry Date has Passed box to show all unused certificates.</p> <p>If the expiry date passes before the gift certificate is redeemed, the gift certificate will still have a status of Valid, however, it will no longer be displayed unless the check box is checked.</p> <p>Gift certificates whose expiry date has passed are still valid for use at the store's discretion. Once a gift certificate has been marked Expired by the store, it will no longer be available for use. Use the gift certificate search form</p>

	to look at gift certificates and click the Mark as Expired button to finally expire a gift certificate. After this, it cannot be used as payment on an invoice.
Different Customer	If you have the <i>Can Accept Gift Certificates, Gift Cards, Vouchers From Non-Owner</i> privilege, you can show all outstanding gift certificates, regardless of the owner.

The sum of all payments needs to equal amount tendered, otherwise you will receive an error message when you save the invoice. Once the amount Tendered is equal to the Total, you can click the **Save** button on the invoice and you are ready to Print the Invoice.

6.2.5 Receiving Payment by Gift Card

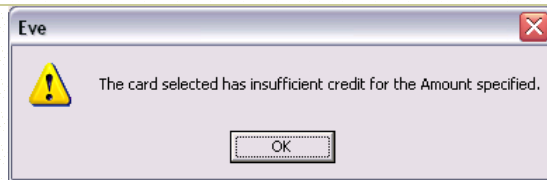
When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the payment methods section of the Data Module. The defaults, as delivered with EVE, for Gift Cards are:

Customer is required when payments are made by Gift Card. The Gift Card prompt is displayed.

Gift Cards must have been issued at the Cost Center where the purchase is being made in order to be used unless the *Gift Certificates/Cards Can Be Redeemed At Any Cost Center* option was checked when Setting Sales Options (See Section 4.3.2.Sales Options).

Swipe Card

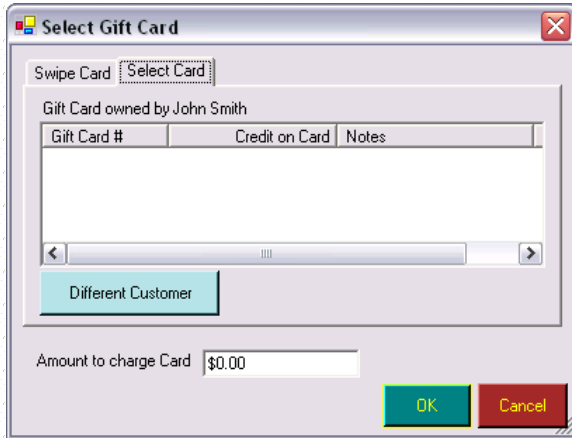
Swipe	If you have an MSR (Magnetic Stripe Reader) attached and your gift cards contain a magnetic stripe, you can swipe the card. Alternatively, you could use a barcode on the card. EVE will extract information about the card from the information contained in the stripe/barcode and the information below will be shown for you.
Gift Card #	The gift card # will be displayed
Gift Card ID	The gift card ID will be displayed
Owned By	The owner (recipient of the gift card) will be displayed.
Credit on Card	The current balance on the card will be displayed.
Amount to charge Card	The amount to charge to the card will be displayed. This automatically defaults to the total from the invoice. If the card has insufficient funds to cover the full value of the invoice, a message will be displayed:



Change the amount to be charge to the card to an amount no more than the maximum on the card and, later, choose an additional payment method on the invoice to cover the balance.

Select Card

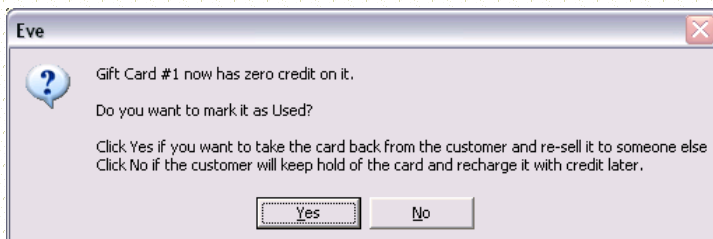
Use the Select Card tab if you will be manually selecting the gift card to use as a payment method.



All gift cards held by the selected customer will be displayed. You can choose an existing, outstanding (i.e. unused) gift card owned by the customer.

Gift Card #	The gift card # will be displayed.
Credit on Card	The current amount of credit on the card will be displayed.
Notes	Any notes that were created when the gift card was created are shown.
Different Customer	If you have the <i>Can Accept Gift Certificates, Gift Cards, Vouchers From Non-Owner</i> privilege, you can show all outstanding gift cards, regardless of the owner.

If you use all of the funds available on a gift card, you will be prompted to mark the card as Used (i.e. it will be returned to the store so you can re-sell it to another customer) or to allow the customer to hold on to the card so he/she can recharge it with more credit at a later date.



The sum of all payments needs to equal amount tendered, otherwise you will receive an error message when you save the Invoice. Once the amount Tendered is equal to the Total, you can click the **Save** button on the invoice and you are ready to Print the Invoice.

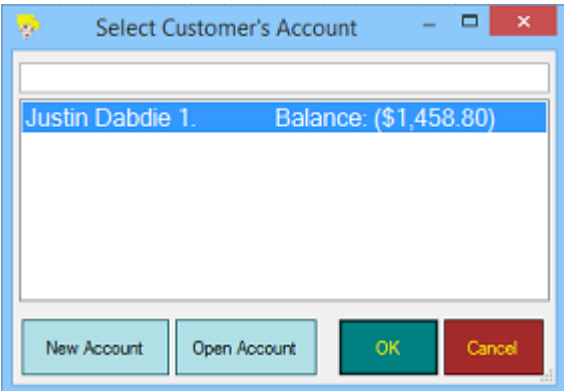
6.2.6 Receiving Payments by Account

You may allow customers to make purchases On Account whereby no money changes hands at the time of the purchase.

When a payment method is chosen, a number of different prompts may be shown. You can choose how each payment method behaves by setting its properties in the payment methods section of the Data Module. The defaults, as delivered with EVE, for Customer Accounts are:

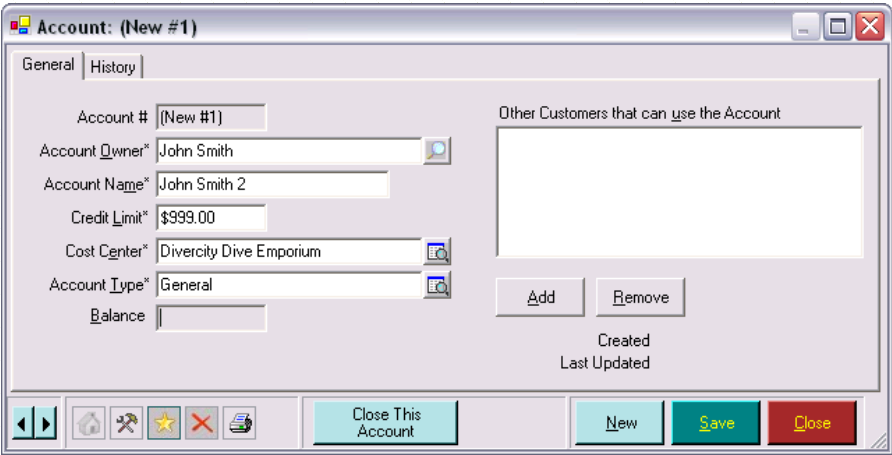
A Customer is required when items are placed On Account. Authorization is also required. Only employees with the *Can Use Payment Methods Where Authorization Required* privilege will be able to provide authorization. In addition, employees who can use accounts should have the *Can Add Account Payments* and *Can Close Accounts* privileges.

When you choose the On Account payment method, the Account Prompt is displayed.



All Accounts held by this customer will be displayed. Each customer may have multiple accounts although usually they will only have one. If the customer does not have an account, click the **New Account** button to create an Account. You can right mouse click on an account name and click **Open**, to show the details of an existing account.

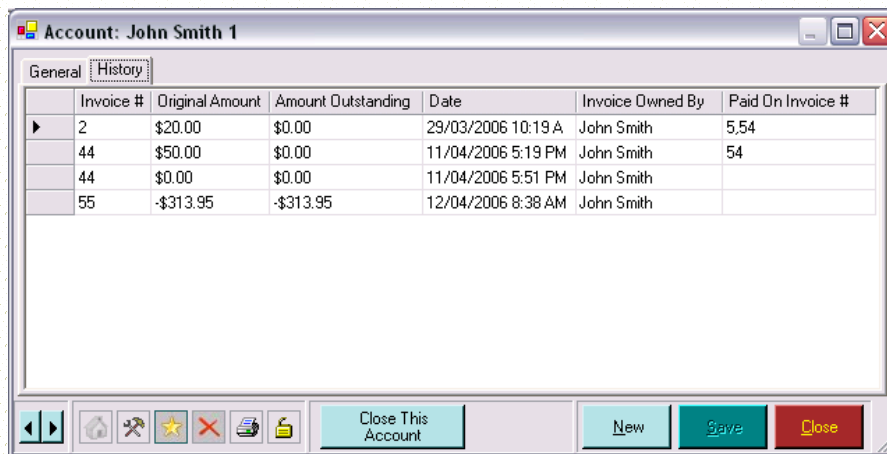
New Account



Account Owner	The name of the customer making the purchase will be automatically defaulted. You can select a different customer from the Customer search box if you wish.
Account Name	This is the name that you give to the account. When creating a new account EVE assigns a default account name, consisting of the customer’s name and an incremental number (i.e. 1 for their first account, 2 for their second account, etc.). You can change this if you wish.
Credit Limit	The customer is not allowed to accrue sales greater than this value on the account. Enter a positive value, with or without the currency symbol. If you

	attempt to make a sale where the credit limit will be exceeded, EVE will show an error message.
Cost Center	Each account is associated with a Cost Center. When you choose an account the Cost Center to which it relates is shown. It cannot be changed. Only accounts valid at the cost center at which the customer is making the purchase can be used.
Account Type	In this version of EVE, the account type defaults to General. You can create accounts for different purposes, for example, trip account, course account, etc.
Balance	The current balance of this account will be displayed. If the customer has multiple accounts, this may not equal the total amount owing by or owed to the customer.
Other Customers that can use the Account	You can click the Add button or Remove button to add/remove other Customers that can use the Account. When these customers are making purchases on account, this account will be displayed as an available option. It is the account owner who will receive the account statement and all transactions made by any of the customers allowed to use the account will appear on the statement.
Close This Account	Only Employees that have the <i>Can Close Accounts</i> privilege will be able to click the Close Account button. When Setting Sales Options (See Section 4.3.2.Sales Options), you can choose what action will be taken <i>When the Account Balance Reaches Zero</i> . You can automatically close the account, have a prompt show asking if the account should be closed or do nothing.

History



You can view all of the transactions on a particular account on the History tab.

Invoice #	This is the transaction that the original purchase or payment was made on.
Original Amount	The amount of the original transaction.
Amount Outstanding	The amount outstanding on the Invoice identified.
Date	The transaction date of the original Invoice.
Invoice Owned By	The invoice owner (will usually be the account holder but may be any of the customers that can use the account.)
Paid on Invoice #	The Invoice #(s) that were used to pay off the original invoice. Partial payments can be made when paying off an account, so you may see more than one invoice

number in this column.

The sum of all payments needs to equal amount tendered, otherwise you will receive an error message when you save the Invoice. Once the amount Tendered is equal to the Total, you can click the **Save** button on the invoice and you are ready to Print the Invoice.

6.2.7 Making Payments on Accounts

Use the Unpaid Invoices tab on the Invoice form to take payment on account. As customers make purchases on account, EVE tracks which specific invoices are outstanding and which have been fully paid. When customer's pay off their account, you can indicate which invoice(s) they are paying the balance for and issue partial payments against individual invoices, if necessary.

Unpaid Invoices

All invoices with any unpaid balance are listed on the Unpaid Invoices tab. Select the invoice(s) that you want to make payment against.

You can use the Cool Bar to quickly set the amount being paid against each outstanding invoice.

Click **Pay All** to indicate that all outstanding invoices are to be paid in full.

Select one or more outstanding invoices in the grid and click **Pay Selected** to pay off just those invoices.

Click **Pay Specified Amount** if the customer is going to pay a specified amount. In this case, EVE will choose which invoice(s) will be paid by starting with the oldest and assigning an amount to each one until the full amount being paid has been exhausted.

Click **Pay None** to zero out the payments so you can start again if you made a mistake.


Click **Include Alternative Customers** if the customer is going to pay for somebody else's outstanding invoices. EVE will show the Customer Search form so you can choose the alternative customer and will then list that person's outstanding invoices.

Select one or more outstanding invoices in the grid and click **Open Invoice(s)** to view details of those invoices.

Pay Amount	Indicate the amount you will be paying against each invoice. You can make a payment against one invoice or multiple invoices. EVE will fill in this column for you if you use the Cool Bar buttons described above.
Owed on Invoice	The total amount Owed on the Invoice will be displayed.
Invoice #	The original Invoice # will be displayed.

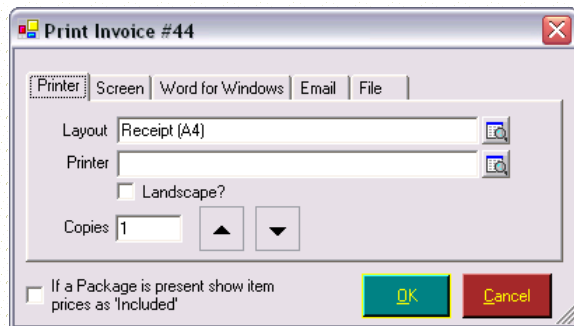
Date	The original Invoice Date will be displayed.
Invoice Owned By	The original owner of the Invoice (i.e. The customer that made the purchase) will be displayed.
Account ID	The account that was used for the original invoice is identified along with its name.
Account Name	
Cost Center	The cost center that the original invoice belonged to is displayed.

6.2.8 Printing the Invoice

The print dialog is shown when a transaction is saved or when you select the Print Icon  at the bottom left of the Invoice form.

You can choose to send your invoice to print on a Printer, Screen, Microsoft Word, Email or File.

Printer



‘Printer’ is the most common print destination. Click the **Print** button to send the transaction details to the printer shown in the pop up list box. The pop up list box holds a list of all printers installed on your computer using a standard Windows printer driver (whether they be local printers attached to the serial, parallel or USB port, or network printers attached to another PC on the network). Invoice prints, refund prints, gift certificate prints, etc. are all considered to be different reports. You might, therefore, always send invoices to the receipt printer, and refunds to the desktop printer. You can indicate (on the Printers tab of the Options form) which printer will be used by default for each report type.

Layout	Select the layout you want to use for your invoice. You may have different print layouts for different printers. For example, you may have one for printing receipts on paper rolls and a different one for printing larger receipts on A4/Letter sized paper. You can create and edit layouts in Reporting.
Printer	Choose the printer to send your invoice to.
Landscape	If you want the invoice to print in landscape format (i.e. the width is greater than the height), choose Landscape. Otherwise the invoice will print in portrait (i.e. the height is greater than the width).
Copies	You can choose to print multiple copies by typing the number of copies to print or by using the Up button or Down button.
If a Package is present, show item prices as included	If you have sold the customer a package, you can choose to print the value of each individual package item, or you can print the total for the package and show each line item as ‘included’.

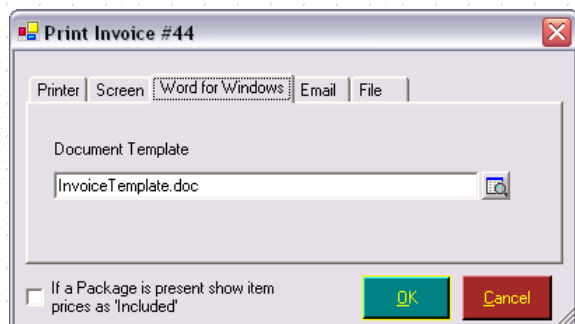
Screen



You will not typically send the print to the screen. This acts like a print preview and shows the general layout of the transaction.

Layout	Select the layout you want to use for your invoice. All documents within EVE have default print layouts. You can edit the layout in Reporting.
Landscape	If you want the invoice to print in landscape format, choose Landscape. Otherwise the invoice will print in portrait.
If a Package is present, show item prices as included	If you have sold the customer a package, you can choose to print the value of each individual package item, or you can print the total for the package and show each line item as 'included'.

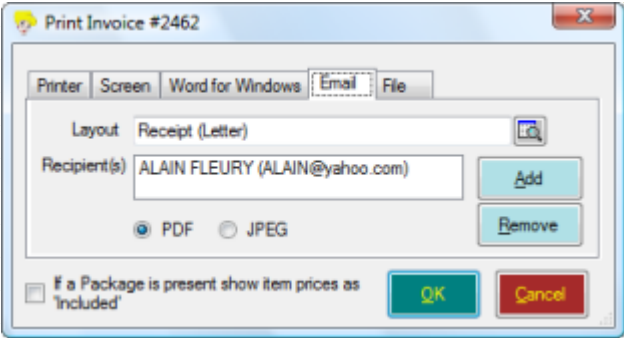
Microsoft Word



Choose this if you want to keep a saved version of the transaction on disk in Microsoft Word format. When you click the **OK** button, Microsoft Word will start and a document will be created showing the transaction details.

Document Template	Choose the Microsoft Word template to use for this report. You can edit document templates in by clicking Tools then Word Templates on the main EVE form.
If a Package is present, show item prices as included	If you have sold the customer a package, you can choose to print the value of each individual package item, or you can print the total for the package and show each line item as 'included'.

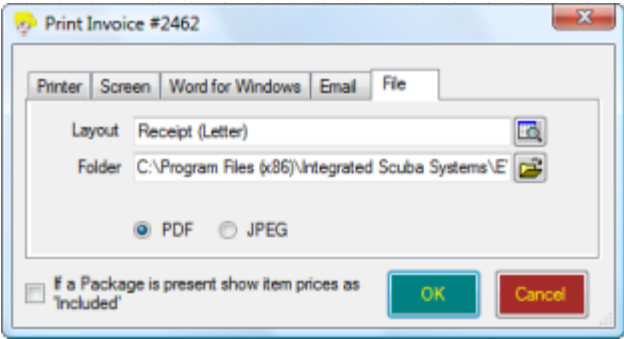
Email



In some cases you may want to email the invoice to the customer. If you choose this option, EVE will save the invoice as a PDF or JPEG image and automatically attach it to the email. In the case of JPEG, if the invoice covers more than one page, there will be multiple attachments.

Recipient	If the customer you selected on the invoice has an email address on file, it will be shown in the Recipient list. You can click the Add button or the Remove button to change recipients.
If a Package is present, show item prices as included	If you have sold the customer a package, you can choose to print the value of each individual package item, or you can print the total for the package and show each line item as ‘included’.

File



In some cases you may want to save the invoice to a file. EVE will create a PDF or JPEG image file in the folder you indicate.

Folder	You can send the document to a file folder. Use the Change button to change to location.
If a Package is present, show item prices as included	If you have sold the customer a package, you can choose to print the value of each individual package item, or you can print the total for the package and show each line item as ‘included’.

6.3 Refunds

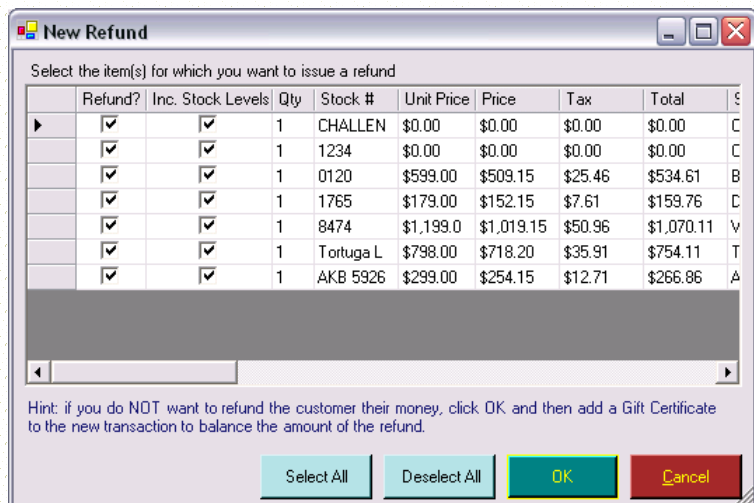
Occasionally customers may wish to return an item they purchased at your store. This may be an exchange for an alternative item, a refund for store credit or a full refund in the form that the original payment was made.

Select the Sales Module from the Hierarchy or the Module buttons. Select Find invoice from the Button Bar at the top of the form.

You may also begin a refund through the Customers Module. Select the Customers Module from the Hierarchy or the Module buttons. Find the customer you wish to sell to by using the customer search option. Choose the Sales Related customer information and find the invoice you wish to make a refund on and open it.

6.3.1 Issuing a Refund

Once the Invoice form is open, click the **Refund** button at the bottom of the invoice. Each item that was purchased on the original invoice will be shown on the New Refund form.



The 'New Refund' dialog box contains a table for selecting items to refund. The table has columns: Refund?, Inc. Stock Levels, Qty, Stock #, Unit Price, Price, Tax, and Total. Below the table is a hint and four buttons: Select All, Deselect All, OK, and Cancel.

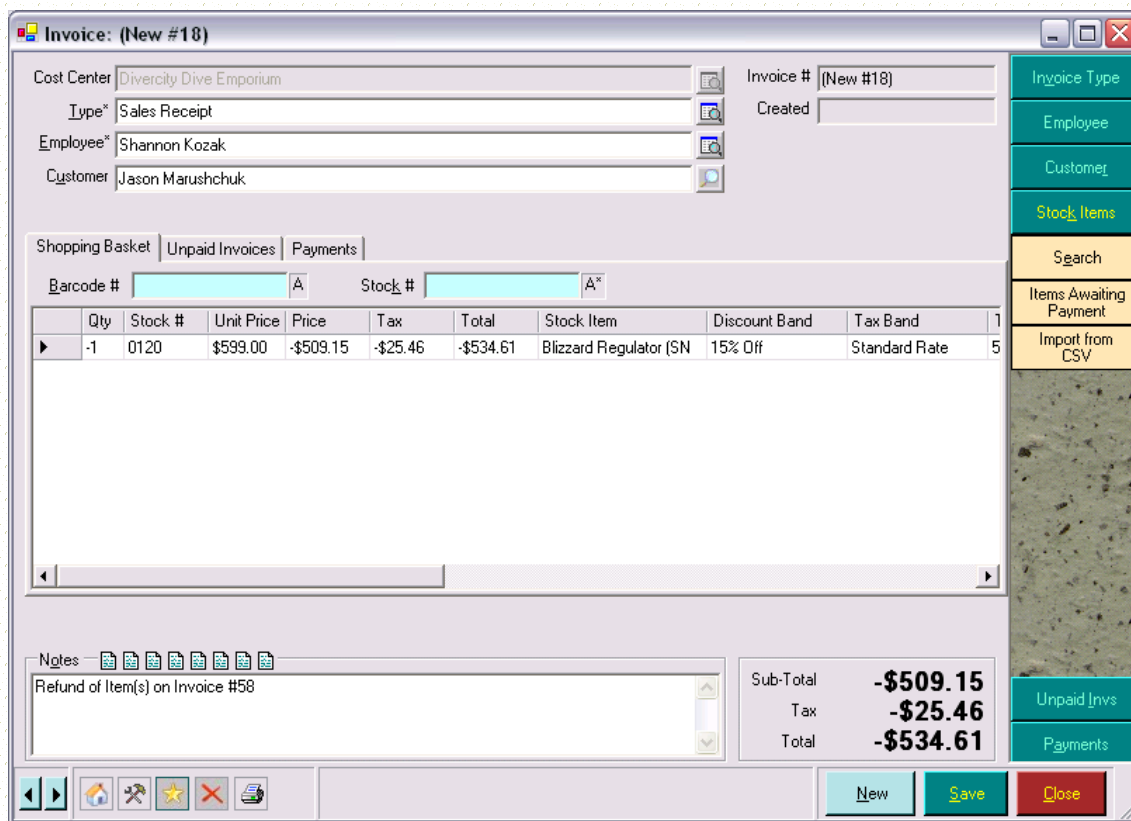
Refund?	Inc. Stock Levels	Qty	Stock #	Unit Price	Price	Tax	Total
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	CHALLENGE	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	1234	\$0.00	\$0.00	\$0.00	\$0.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	0120	\$599.00	\$509.15	\$25.46	\$534.61
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	1765	\$179.00	\$152.15	\$7.61	\$159.76
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	8474	\$1,199.00	\$1,019.15	\$50.96	\$1,070.11
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Tortuga L	\$798.00	\$718.20	\$35.91	\$754.11
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	AKB 5926	\$299.00	\$254.15	\$12.71	\$266.86

Hint: if you do NOT want to refund the customer their money, click OK and then add a Gift Certificate to the new transaction to balance the amount of the refund.

Select All Deselect All OK Cancel

Select the items you want to refund by putting a check mark in the Refund column. You can click the **Select All** button or **Deselect All** button to quickly make your selections. If you want to Increase Stock Levels as a result of the refund, check the checkbox. You will want to do this if the item being returned is in good working order and can be put back into inventory for resale. You will not want to do this if the item is damaged.

EVE creates a new invoice containing details of the new refund.



The 'Invoice: (New #18)' form displays invoice details and a shopping basket. The shopping basket grid shows the selected items for the refund. The sub-total and total are displayed as negative amounts. A note is added to the invoice indicating that this is a refund against the original invoice number.

Cost Center: Diversity Dive Emporium
Type: Sales Receipt
Employee: Shannon Kozak
Customer: Jason Marushchuk

Invoice #: (New #18)
Created:

Shopping Basket | Unpaid Invoices | Payments

Barcode #	Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item	Discount Band	Tax Band
A	-1	0120	\$599.00	-\$509.15	-\$25.46	-\$534.61	Blizzard Regulator (SN	15% Off	Standard Rate

Notes: Refund of Item(s) on Invoice #58

Sub-Total: -\$509.15
Tax: -\$25.46
Total: -\$534.61

New Save Close

The shopping basket grid shows those Stock Items you selected. The sub-total and total will be displayed as a negative amount to indicate the customer will be returned their money. A note is added to the invoice indicating that this is a refund against the original invoice number.

Use the Payments tab to refund the customer. You can choose the payment method you will use for the refund. If you are giving the customer back their money, you will usually want to use the same payment method that was used on the original invoice. If you do not want to give the customer back their money you can choose the On Account payment method to credit their in-store account.

Alternatively, you can issue a Gift Certificate for the amount of the refund. If you want to do this, add a new Gift Certificate to the Shopping Basket for the same amount.

If the refund is for a Course or a Trip, EVE will prompt you to remove the customer from the trip or course provided a full refund is being issued.

6.4 Quotes

A Quote can be used to give a customer an estimate of the price of certain goods. The Quote can be printed and saved to the database. If, at a later date, the customer decides to purchase the items, you can create an invoice based on the original quote and using the prices quoted.

Select the Sales Module from the Hierarchy or the Module buttons. Select New Quote from the Button Array. You can tab through the fields on the Quote form or use the Cool Bar at the right of the form to speed your data entry.

You may also begin a Quote through the Customers Module. Select the Customers Module from the Hierarchy or the Module buttons. Find the customer you wish to create a quote for by using the customer search option. Choose the sales related customer information. Select New Quote.

6.4.1 Creating a Quote

Creating a Quote follows the same process as the Sales Process. Only those steps, which differ, are noted below.

General

Quote: (New #3)

Cost Center: Diversity Dive Emporium Quote #: (New #3)

Employee*: Shannon Kozak Created:

Customer: Jason Marushchuk

Expiry Date: July 12, 2006

Shopping Basket

	Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item	Discount Band	Tax Band	
▶	1	CHALLENGER	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Kit		No Tax	0
	1	1234	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Regulator		Standard Rate	5
	1	0120	\$599.00	\$509.15	\$25.46	\$534.61	Blizzard Regulator	15% Off	Standard Rate	5
	1	1765	\$179.00	\$152.15	\$7.61	\$159.76	Dual Octopus	15% Off	Standard Rate	5
	1	8474	\$1,199.00	\$1,019.15	\$50.96	\$1,070.11	Wisdom Computer w	15% Off	Standard Rate	5
	1	Tortuga L	\$798.00	\$678.30	\$33.92	\$712.22	Tortuga BCD Large	15% Off	Standard Rate	5
	1	AKB 5926	\$299.00	\$254.15	\$12.71	\$266.86	Akona Evolution	15% Off	Standard Rate	5

Notes: [Icons]

Sub-Total: **\$2,612.90**
Tax: **\$130.65**
Total: **\$2,743.55**

Buttons: [Icons] Send To New Invoice New Save Close

Cost Center

If you have only one cost center, you do not need to add or change the information in this field. The Cost Center is set for you when you add the first stock item to the Quote.

Employee	Enter the employee who is processing the Quote. This will default to the employee who is logged on provided the 'Default employee on new Records' option is set on the Data Entry page of the Options form.
Customer	Customers must be identified on a Quote. Enter the Customer's name on the Quote. If this is a new customer, click the New button on the Customer Search form and you will be able to Create a New Customer.
Quote #	The Quote number is auto-generated by EVE. It will display as New #XX (where XX is the number of transactions created in this session of EVE) until you save the Quote at which point EVE will assign a permanent quote number.
Created	You do not need to enter a value for the 'Created' date since, when the Quote is saved, EVE will enter a time stamp for you. However, for those occasions when you need to backdate a Quote, you can click on the padlock next to the field to unlock it so you can type a different date (provided you are authorized).
Expiry Date	The Expiry Date will default based on the <i>Quote Duration</i> you selected when Setting Sales Options (See Section 4.3.2.Sales Options) but you can change that date if necessary.
Notes	Use Notes to enter any free-text comments that you wish. The Notes are printed onto the quote.

Shopping Basket

Enter items the same way that you would for Selling Stock Items (See Section 6.1.1.Selling Stock Items), Courses, Trips, etc. The Unpaid Invoices and Payment Methods tabs are not shown as they are not relevant for Quotes.

6.4.2 Converting a Quote to a Sale

Select the Sales Module from the Hierarchy or the Module buttons. Select Find Quote from the Button Array. Search for the Quote you want to convert and then double-click on it or select it and click **Open** to open the Quote form.

The screenshot shows the 'QuoteSearch' window. It has search fields for Quote #, Customer, Employee, Status, From Start Of (date), and To End Of (date). There are buttons for Search, Clear, New, Open, and Close. Below the search fields is a table with the following data:

Quote #	Customer	Total	Employee	Expiry Date
2	Jason Marushchuk	\$2,743.55	Shannon Kozak	12/07/2006
1	Mary Applebee	\$11.59	Shannon Kozak	05/07/2006

At the bottom of the window, it says 'Found: 2' and there is a link 'Do Not Show Void Quotes'.

If you selected the *Can Edit Existing Line Items on Saved Quotes* when Setting Sales Options (See Section 4.3.2.Sales Options), you will be able to edit the details of each line item. Otherwise you can add new items to the Quote, but will not be able to edit existing items.

Click **Send to New Invoice**. A form will be shown listing the items on the Quote.

Select the item(s) you want to appear on the Invoice

	Include?	Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item	Discount Band
	<input checked="" type="checkbox"/>	1	CHALLENGER	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Kit	
	<input checked="" type="checkbox"/>	1	1234	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Regulator	
	<input checked="" type="checkbox"/>	1	0120	\$599.00	\$509.15	\$25.46	\$534.61	Blizzard Regulator	15% Off
	<input checked="" type="checkbox"/>	1	1765	\$179.00	\$152.15	\$7.61	\$159.76	Dual Octopus	15% Off
	<input checked="" type="checkbox"/>	1	8474	\$1,199.00	\$1,019.15	\$50.96	\$1,070.11	Wisdom Computer w	15% Off
	<input checked="" type="checkbox"/>	1	Tortuga L	\$798.00	\$678.30	\$33.92	\$712.22	Tortuga BCD Large	15% Off
	<input checked="" type="checkbox"/>	1	AKB 5926	\$299.00	\$254.15	\$12.71	\$266.86	Akona Evolution	15% Off

Select All Deselect All OK Cancel

Select those items that you want to add to the invoice by making sure there is a checkmark in the Include column.

Cost Center: Divercity Dive Emporium Invoice #: (New #5)
 Type: Sales Receipt Created:
 Employee: Shannon Kozak
 Customer: Jason Marushchuk

Shopping Basket Unpaid Invoices Payments

Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item	Discount Band	Tax Band
1	CHALLENGER	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Kit		No Tax
1	1234	\$0.00	\$0.00	\$0.00	\$0.00	Challenger Regulator		Standard Rate
1	0120	\$599.00	\$509.15	\$25.46	\$534.61	Blizzard Regulator (SN	15% Off	Standard Rate
1	1765	\$179.00	\$152.15	\$7.61	\$159.76	Dual Octopus	15% Off	Standard Rate
1	8474	\$1,199.00	\$1,200.00	\$60.00	\$1,260.00	Wisdom Computer w	Special	Standard Rate
1	Tortuga L	\$798.00	\$678.30	\$33.92	\$712.22	Tortuga BCD Large	15% Off	Standard Rate
1	AKB 5926	\$299.00	\$254.15	\$12.71	\$266.86	Akona Evolution	15% Off	Standard Rate

Sub-Total: \$2,612.90
 Tax: \$130.65
 Total: \$2,743.55

Notes:
 New Save Close

Invoice Type
 Employee
 Customer
 Stock Items
 Search
 Items Awaiting Payment
 Import from CSV
 Unpaid Invs
 Payments

You can add or remove items to the invoice. You can edit discount bands or pricing. You are now ready to Receive Payment.

7 CUSTOMERS

The Customers Module allows you to keep track of all your existing and potential customers' details along with all related data - for example, customer invoices, certifications, specialties and interest in con-ed courses and trips attended, etc. All of this information makes customer tracking and contacts available at the touch of a few buttons.

In addition, EVE holds dive club/dive society details and allows the center to embrace new divers (whatever the reason they visit the store) into their schedule of activities. Dive club members can be e-mailed and text messaged straight from EVE, allowing the dive center to keep customers hot with all the latest offers and opportunities.

A digital image of the customer (captured using a scanner, digital camera, etc.) can be inserted into the image file for future club card administration. The image feature eradicates the need to repeatedly ask for passport photos and allows rapid verification of identity. If you have an Internet connection you can upload PIC details of certified customers directly to PADI and print the temporary card straight from EVE.

Use the customer details section to enter details of new customers and find details of existing customers.

7.1 New Customer

Select the Customers Module from the Hierarchy or the Module buttons. Click New Customer to capture a new customer's details or Find Customer to edit/review an existing customer's data.

General

Use the General section to capture name and contact information about a customer. Only the First and Last Name fields are mandatory.

Customer: Sandra Gable

General

Name

First Name* Sandra

Middle Initial Owes \$345.08

Last Name* Gable

Known As

Customer ID 18137

Contact Details

EMail sandra@gmail.com

Phone (H) 123 899-8023

Phone (W)

Phone (M) 123 999 4444

Fax

Pager

Personal Details

Date of Birth 19 May 2014 Age 0

Sex Female

Marital Status Married

Enquiry Source Passed the Shop

Acct Manager

Home Address Local Work Reservation Linked Customers

Country UNITED STATES

Line 1 4507 Grinder Pass

Line 2

City Austin

State Texas

Postcode 78749

Mailing Lists

☒ Be A Diver

☐ Bounced Emails

☐ Boy Scouts

☐ Dog Days

☒ Newsletter

☐ Padi-Dad

☐ Student News

Customer Type

☐ EOL Price

☐ Instructor




☐ Staff

☐ Staff Instructor

☐ Store Sale

☒ Student

If you are planning to upload PIC details from EVE to PADI via the internet you also need to enter the Middle Initial, Date of Birth, Sex, Address and Contact Information.

First Name	Enter the customer's First Name, Middle Initial and Last Name.
Middle Initial	
Last Name	
Known As	
CustID	EVE will automatically generate a unique Customer ID for each customer. This is a system-generated field and cannot be edited.
Owes/Credit	If the customer owes money, the amount owing will be displayed in red. If the customer has a credit on account, the amount of the credit will be displayed in green.
Date of Birth	Personal details for the customer are recorded. You can collect Sex, Marital Status and Enquiry Source from the pop up list boxes.
Sex	
Marital Status	
Enquiry Source	
Account Manager	<p>You can use this to assign a Staff member to the customer. You could use this in various ways. For example:</p> <p>ii) You could use the Update Multi Rows feature to assign a third of your customers to employee 1, another third to employee 2 and the final third to employee 3. In the slow season, employees can then be assigned the task of phoning/emailing their customers to solicit business. Employees can search for all of their customers using the Account Manager pick-list on the Details page of the Customer Search Wizard.</p> <p>ii) In resorts, customers are often referred by agents. Those agents may be paid commission based on sales or trips attended, etc. You can enter those agents as staff members into EVE and then assign them to customers they referred. You can then use the Sales Search wizard to establish the value of sales resulting from a particular agent's referrals. To do this, click on the Customers tab of the Sales Search Wizard and select the agent in the Account Manager pick-list.</p>
Email	Contact details for the customer are tracked.
Phone (H)	<p>If you capture the customer's Email Address you can automatically generate an email to the customer by clicking the  icon.</p> <p>If you capture a Mobile Phone number for the customer you can send an SMS message using TextAnywhere services by clicking the  icon.</p>
Phone (W)	
Phone (M)	
Fax	
Pager	If you are a Skype user (i.e. Internet phones), click the  icon to dial the phone number.
Country	<p>You can track multiple addresses for each customer by entering details on each of the Home, Local and Work Address tabs.</p>
Line 1	
Line 2	

City	
State	
Postcode	
Reservation tab	If you operate a resort where customers visit for a period, you can record when they're due to arrive/leave and where they're staying (hotel and room number).
Linked Customers tab	Sometimes you may want to link customers together. E.g. if you run a swim school, you could enter the mom and 2 children as customers and then link the 2 children to the mom using the Linked Customers tab.
Mailing List	<p>Select the Mailing List(s) you would like this customer to receive. You can create new Mailing Lists in the Data Module (See Section 4.4.24.Mailing Lists).</p> <p>You may want to keep track of mailing lists applicable for each person. If a family joins your club you may want to send only one newsletter to the household even though there are several members of the family on the database. Put a checkmark against Newsletter for one member of the family and leave it unchecked for everyone else. When you do a mail merge in preparation for distribution of the newsletter, search on those people with newsletter checked.</p>
Customer Type	<p>Select the Customer Type(s) relevant to this customer. You can create new Customer Types in the Data Module (See Section 4.4.10.Customer Types).</p> <p>Customer Types drive which discounts are applicable for customers in the Sales Module and allow you to do searches for all people of a particular type - e.g. all Club Members, etc.</p>

7.2 Customer Details

The full power of EVE can only be achieved if you capture additional information for your customers. Use the General, Club and Image sections to maintain additional customer data.

7.2.1 Adding General Customer Details

Details

Use the Details section to capture additional information on your customers and their next of kin/emergency contact. You will use this section to identify if the customer is commissionable and/or exempt from any taxes.

Customer: Sandra Gable

- General
- Details
- Club
- Image
- Sales Related
- Contact Center
- Certifications
- Trips
- Rentals
- Services
- Resort Reservations
- Groups
- Dive Details
- Popup Notes
- Audit Log

Details

Next of Kin / Emergency Contact

Name: Peter Gable

Relationship:

Address Line 1: 4507 Grinder Pass

Address Line 2:

City: Austin

State: Texas

Postcode: 78749

Telephone: 123 899-8023

Copy Address From "Home Address" Copy Address From Another Customer

Doctor's Report

☐ Required? ☐ Received?

On ☐ Monday . May 19, 2014

Notes

User Defined #1:

User Defined #2:

User Defined #3:

Company: Travel Masters

First Language: English

Occupation:

SSN/Div.#:

Passport #:

Fq. Fly #:

PADI ID:

of Dives: 420

Height:

Weight:

Shoe Size:

☒ Commissionable? ☐ Credit Risk? ☒ Receive PADI marketing emails

☐ Unavailable? ☐ Receive PADI Partner mailings

EVE OnLine

Username: PW:

Insurance

Company: No.

Expires ☐ Monday . May 19, 2014

Tax Exemptions

☐ Government

☐ Lake Store

☐ Senior

Last Purch. Date 10/17/2009 10:36:15 AM

Created 10/17/2009 10:33:43 AM

Last Updated 7/8/2010 9:33:45 AM

New Save Close

**Next of Kin /
Emergency Contact
- Name**

Enter contact information for the Next of Kin or Emergency Contact person. If applicable, you can quickly copy the customer's address by using the **Copy Address From Customer** button.

Relationship

Address Line 1

Address Line 2

City

State

Postcode

Telephone

Company

Pick the name of the company for which the customer works. You'll only probably do this if the company regularly sends customers your way.

First Language

You can select the customer's preferred Language from a pop up list box. In multi-lingual locations, you can also indicate which language each Course is taught in so you can match customers to the appropriate course.

Occupation

Enter unique identifying information for the customer.

SSN/Div. #

Freq. Flyer #

Passport #

# of Dives	Enter the number of dives the customer has made
Height	Enter physical characteristics for the customer. This information can be helpful in selecting rental gear. You will need to decide which units to enter each value in for example, meters as opposed to feet, etc. and then stick with those units.
Weight	
Shoe Size	
Commissionable	<p>If employees will receive commission when sales are made to this customer, leave the <i>Commissionable</i> box checked (as defaulted). If this box is checked, employee commissions as set in Employees (See Section 4.4.15. Employees) and the commission on specific Stock Items will be calculated and applied on sales to this customer.</p> <p>Sales to some customers should not contribute towards the commission for the employee responsible. For example, you might remove the check from the <i>Commissionable</i> checkbox, for all employees if you do not want to give commission when they sell items to themselves.</p>
Credit Risk	Put a tick in the box if the customer is a credit risk - i.e. they have proven unreliable at repaying monies owed. When a credit risk customer is added to a new invoice, EVE will show a popup message to inform you (if you have turned that feature on using the Customers tab on the Options form).
Receive PADI Marketing emails	Put a tick in the box if the customer wants to receive marketing emails from PADI.
Receive PADI Partner mailings	Put a tick in the box if the customer wants to receive marketing emails from PADI Partners.
Unavailable	If the customer is no longer to be used, for example, in the event of a death, you can mark the customer as Unavailable. The customer is not deleted from the database but will no longer be displayed in the Customer search box unless you specifically choose to Show All.
EVE OnLine Username	If you use EVE's companion produce EVE OnLine (which lets you sell your products, courses and trips on-line) you can enter the customer's EVE OnLine username and password here.
Password	
Insurance Co.	Enter the Insurance company, insurance number and the date the insurance expires for the customer.
Ins. No.	
Expires	
Doctors Report Required	You can track whether a Doctor's Report is Required and whether it has been Received. If it has been received you can enter the date on which it was received.
Doctors Report Received	
On	
Notes	Enter any Notes that are relevant to this customer specifically. Be careful of data protection laws in your location - in some locations you are required by law to pass on to customers all information you hold about them on request.
Tax Exemptions	Enter any Tax Exemptions this customer is eligible for by checking the Tax Bands that do not apply. You can enter new Tax Bands in the Data Module (See Section 5.1.8. Tax Bands)

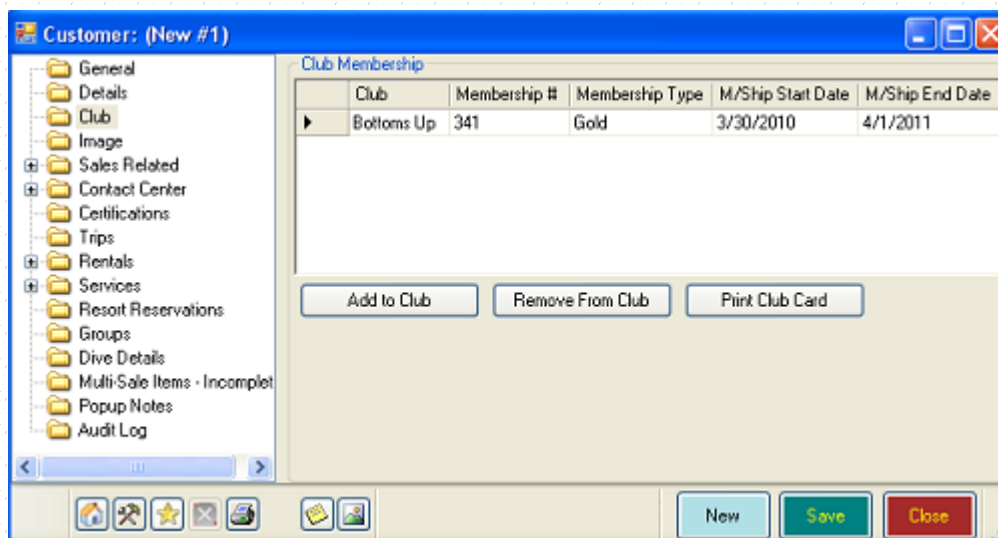
User Defined #1	You can capture information in three <i>User Defined Data Fields</i> . You can right click on the label next to these fields and then click Translate to indicate what the field is used for. E.g. you could call User Defined 1 “Spouse Name”, etc.
User Defined #2	
User Defined #3	
Last Purchase Date	The date of the last purchase by the customer will be displayed. This field is not editable.
Created	The date the customer was originally entered into the system will be displayed. This field is not editable.
Last Updated	The date of the last change to the customer data file will be displayed. This field is not editable.

7.2.2 Adding Club Memberships


Club Membership

Use the Club Memberships section to capture information about any clubs this customer is a member of. For example, if you run a dive club through your store, you can record membership of that. Or you may choose to track membership in the PADI dive society or DAN. You can set up new Dive Clubs in the Data Module (See Section 4.4.3.Clubs).

Note: usually, you will sell club memberships (see section 6.1.11) and, in that case, EVE will automatically add details of the membership here for you.



Highlight the customer and click the **Remove From Club** button to remove the customer from the club. Click the **Print Club Card** button to print cards for dive club members. Click the **Add to Club** button to add this customer to a dive club. Note: adding this way will add the customer directly to the club without charging.

Club	Any Clubs that this customer is a member of are displayed here.
Membership #	The customer’s Membership Number in the club will be displayed. If you have selected the <i>Automatically Set Club Membership Number</i> when setting Customer Options (See Section 4.3.3.Customers Options), club membership numbers will be automatically generated. You can edit the club membership number or use the  icon when the membership # column has focus to automatically generate another number.
Membership Type	The Club Membership Type is displayed. You can pick the membership type from the pop up list box. You can create new Membership Types in the Data

	module - (See Section 4.4.4.Club Membership Types)
Membership Start Date	The club membership Start Date and End Dates are displayed.
Membership End Date	If you have selected the <i>Automatically Set Club Membership Card Dates</i> when Setting Customer Options (See Section 4.3.3.Customers Options), club membership renewal dates will be automatically set based on the options you selected.

7.2.3 Adding an Image

If you plan to print membership cards or upload PIC details using EVE's interface to PADI's PIC OnLine you need to capture a bitmap image of each person. You can do this with a digital camera and/or scanner.

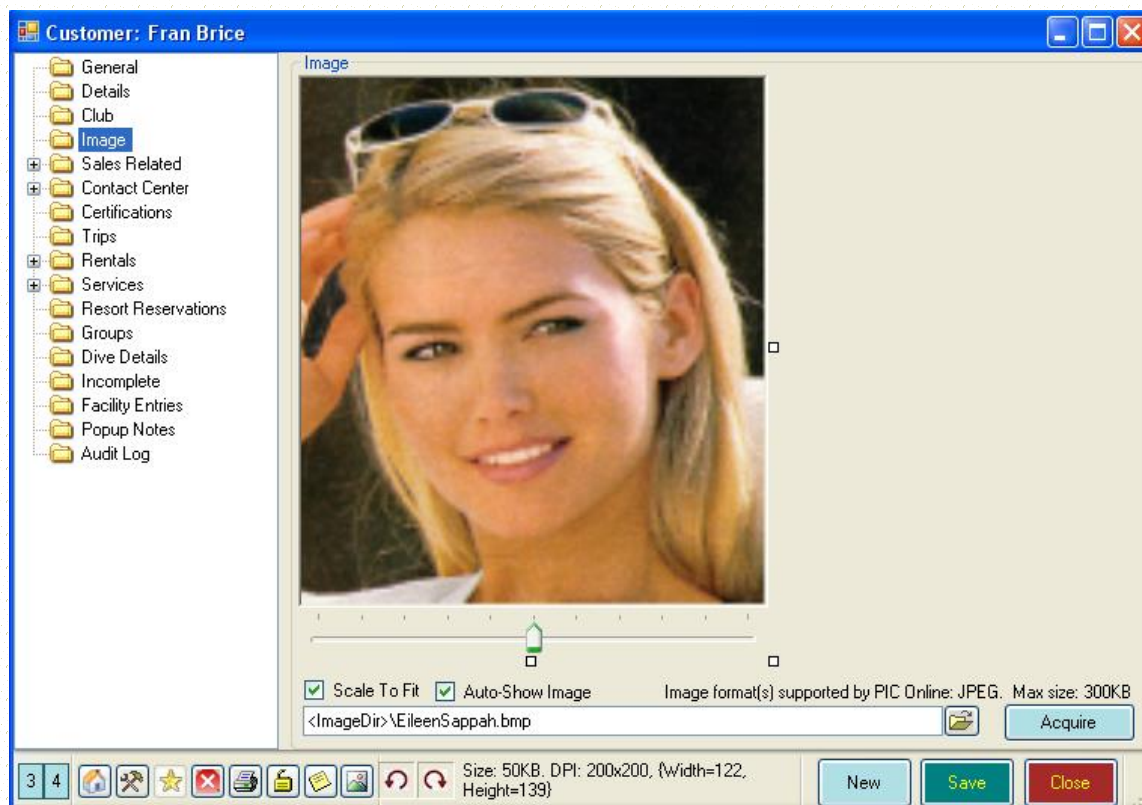
Save the bitmap image (e.g. BMP, JPEG, GIF, TIFF, PNG) into the image file folder on your computer. You can then tell EVE of the location of the image by typing the filename into the text box or by clicking the **Browse for Image** button and selecting the file. You can also drag/drop files from Windows Explorer onto the image display.

If you plan to use EVE's interface to PADI's On-Line PICs, make sure that images sizes are 300kb or smaller as that is the maximum size that PADI allow to be uploaded (at time of writing).


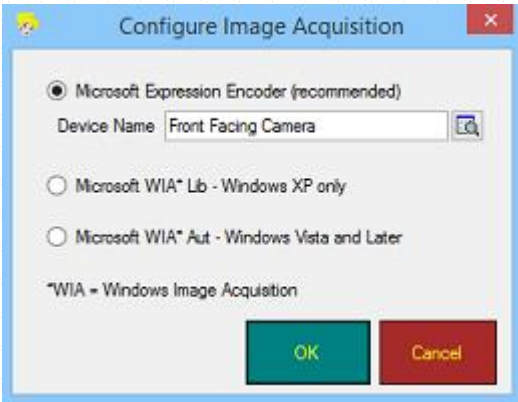


Note: if you have a network and want to view the images on more than one workstation, you should set up the image file folder on each workstation to reference the same folder on the network. For example, you could store all images in a C:\CustomerImages folder on PC#1. Two other PCs may be on the network, one using an H: drive mapping to reference the C: drive on PC#1 and the other using an M: drive mapping. The image file folder on PC#2 will be H:\CustomerImages and on PC#3 will be M:\CustomerImages. Both PCs will access the same images provided images are stored in that folder or a sub-folder of it and the filename specified is of the format <ImageDir>\filename. If you hard-code the folder part of the filename (i.e. you do not use <ImageDir>, but instead specifically use the folder name, for example, H:\customerimages) then only PCs that have an identical H: drive mapping can access the images.

Image

View the customer image in the Image section.



Enter the full pathname to set a pointer to the Image.

Customer Image File	You can set a pointer to the customer's image by entering the file path to the image file. Use the  button to browse your hard drive for the image file.
Scale to Fit	If you want to scale the picture to fit in the screen, select the <i>Scale to Fit checkbox</i> . The original file will not be affected.
Auto-Show Image	If your image files are not stored on your computer (e.g. they're stored on a different computer on your network or on the internet) they may be slow to load. Since you don't want the customer form to be slow to load just because the image is slow, you can remove the tick from Auto-Show Image. In this case, EVE will not load the image each time the customer form is opened. Instead, EVE will show a link "Click Here to Show Image" where the image would be and you can click that link to show the image should you need to.
Acquire	<p>Some scanners and digital cameras have software you can install on your PC. If you have such a device, click the Acquire button to communicate directly with it - i.e. you will be able to capture an image directly from the scanner/camera for insertion into EVE.</p> <p>EVE supports 2 methods of doing this and you can choose which method to use by clicking the Options button at the bottom right of the Customer form and then Configure Image Acquisition:</p>  <p>1/Microsoft Expression Encoder (recommended). Most modern laptops and tablets that have an in-built webcam will support this option and you can click the button to the right of the Device Name field to select the pre-installed driver. If nothing shows in the list you'll need to install a suitable driver first. Note: before using this feature you may need to install the Microsoft Expression Encoder component. EVE will prompt you if you need to do this and you can follow the on-screen instructions.</p> <p>2/Microsoft's WIA (Windows Image Acquisition). You should check your camera or scanner has a WIA interface. iPhones are supported.</p>
 	Click the left of these buttons to rotate the image 90degrees to the left. Click the right of these images to rotate the image 90degrees to the right.

7.2.4 Managing Sales Related Data

Sales history for your customers is displayed in the Sales section. It holds a list of all previous sales transactions (invoices, refunds, gift certificates, etc.) made by the customer. Click on a transaction to show associated details (for example, item(s) purchased, payment method(s) used, employee responsible for the sale, etc.

All Items Purchased

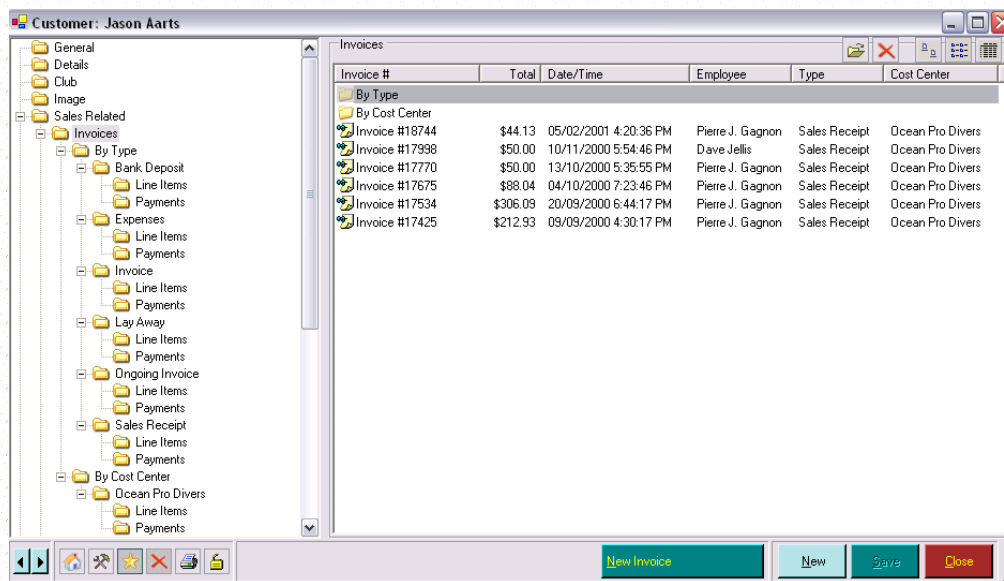
A list of all items purchased by the customer is shown with the most recent at the top of the list.

Invoices

All of the invoices that have been created for a customer are displayed in reverse date order in the Invoices section. Invoices are further classified by type (Bank Deposit, Expenses, Invoice, Lay Away, Ongoing Invoice and Sales Receipts). You can review the line items (i.e. items purchased on an invoice) or the payments (i.e. payment methods and amounts on each invoice). If you have multiple cost centers, invoices are also sorted by Cost Center.

Invoices that have been voided will be shown ~~crossed-out~~.

Select the **New Invoice** button to create a new invoice for a customer as discussed in Selling Stock Items (See Section 6.1.1.Selling Stock Items).



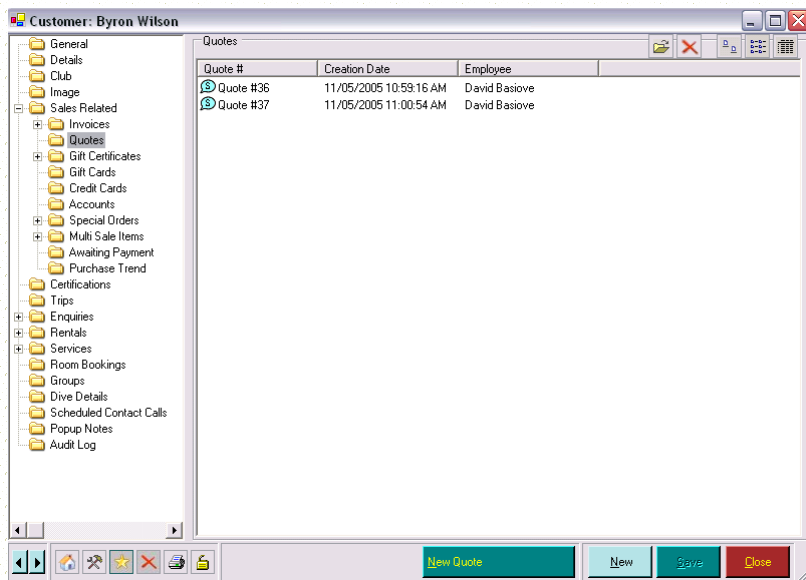
Double click on an invoice to review/edit the specific details on the invoice.

Invoice #	The Invoice # of all invoices is displayed.
Total	The Total amount of the invoice (after taxes) is displayed.
Date/Time	The Date/Time that the invoice was committed to the system is displayed. By default, invoices are displayed in reverse date order (i.e. most recent first). You can change the sort order by clicking on any column header.
Employee	The Employee who originally created the invoice is displayed.
Type	The Type of invoice is displayed. Invoices are automatically categorized by type for easier reviewing.
Cost Center	The Cost Center that the invoice was processed under is displayed. Invoices are automatically categorized by cost center for easier reviewing.

Quotes

All of the quotes that have been created for a customer are displayed in reverse date order in the Quotes section. Quotes that have been voided will be shown ~~crossed-out~~.

Select the **New Quote** button to create a new quote for a customer as discussed in Creating a Quote (See Section 6.4.1.Creating a Quote).



Double click on a quote to review/edit the specific details of the quote. If you want to sell the items on the quote, you will be able to convert the quote to an invoice as discussed in Creating a Quote (See Section 6.4.1.Creating a Quote).

Quote #	The Quote # of all quotes is displayed.
Creation Date	The Date/Time that the quote was committed to the system is displayed. By default, quotes are displayed in reverse date order (i.e. most recent first). You can change the sort order by clicking on any column header.
Employee	The Employee who originally created the quote is displayed.

Gift Certificates

All of the gift certificates that have been created for a customer are displayed in the Gift Certificates section. Gift Certificates are further classified by Outstanding, Used and Expired to make it easier to find the specific gift certificate you wish to review. Gift Certificates that have been voided will be shown ~~crossed-out~~.

You cannot create/edit new gift certificates here. This must be done through the Sales Module as described in Selling Gift Certificates (See Section 6.1.2.Selling Gift Certificates).

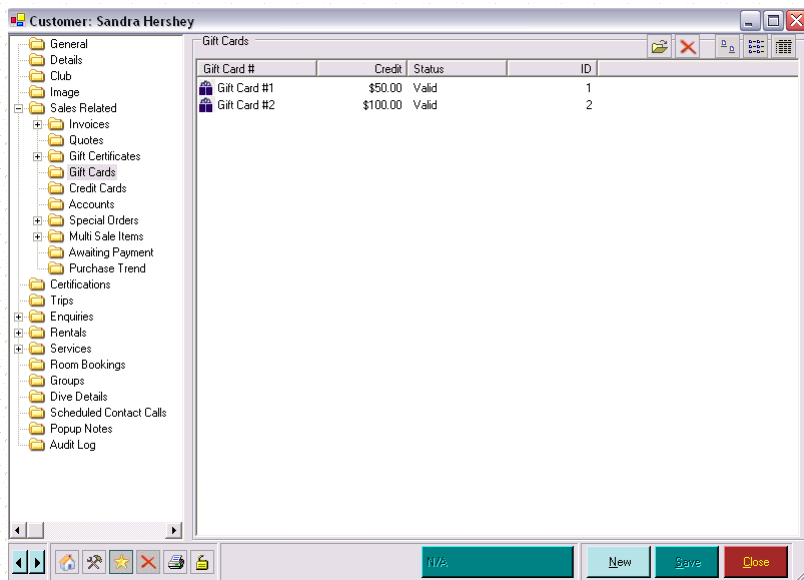
Double click on a gift certificate to review/edit the specific details on the gift certificate.

Gift Certificate #	The Gift Certificate # is displayed.
Value	The original Value of the gift certificate is displayed.
Expiry Date	The Expiry Date of the gift certificate is displayed.

Gift Cards

All of the gift cards that have been created for a customer are displayed in the Gift Cards section. Cards that have been voided will be shown ~~crossed-out~~.

You cannot create/edit new gift certificates here. This must be done through the Sales Module as described in Selling Gift Cards (See Section 6.1.3.Selling Gift Cards).



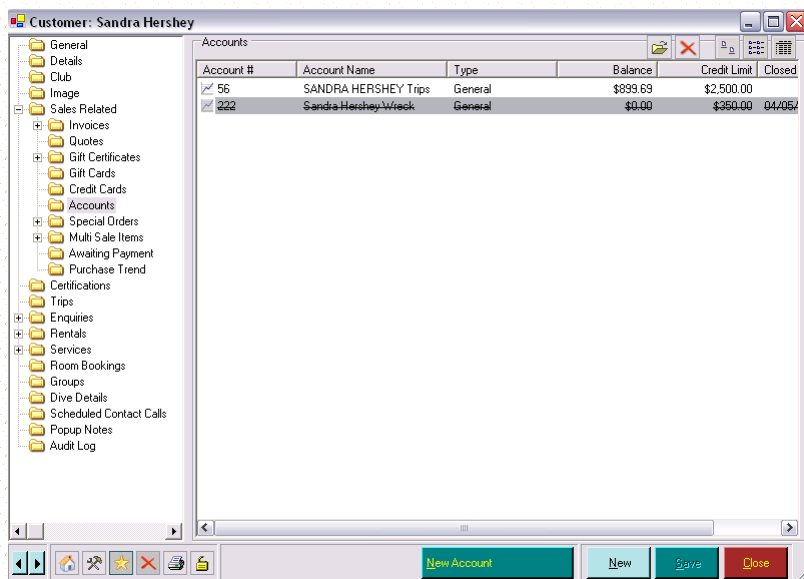
Double click on a gift card to review/edit the specific details on the gift card.

Gift Card #	The Gift Card # is displayed.
Credit	The current Value of the card is displayed. This is the amount that is available to be used for purchases.
Status	The Status of the card (i.e. Expired, Used, Valid, Void) is displayed.

Accounts

A history of customer accounts is displayed here. Accounts that have been closed are marked as ~~crossed-out~~.

Select the **New Account** button to create a new account for a customer as described in Receiving Payment by Account (See Section 6.2.6.Receiving Payments by Account).



Double click on an account to review/edit the specific details of the account.

Account #	The Account Number (as created by EVE) is displayed.
Account Name	The Account Name is displayed. The default name of the account is the

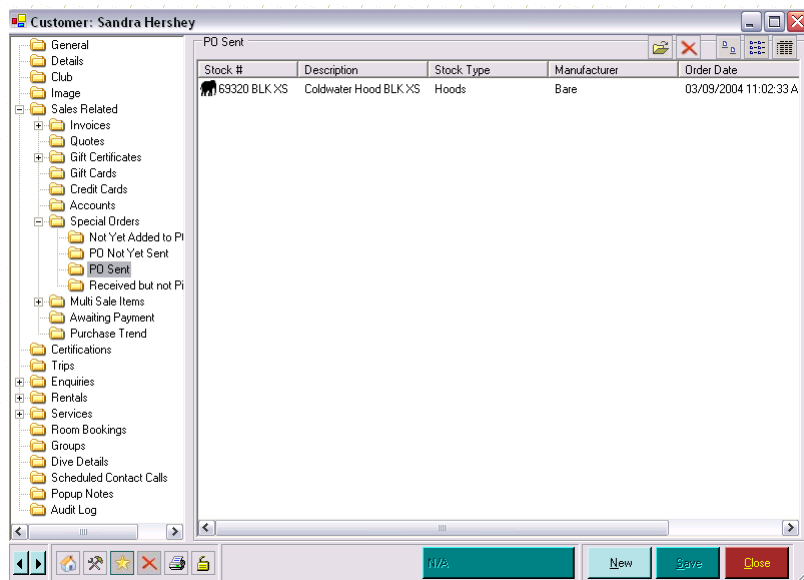
	customer name with a number as the suffix - e.g. "John Smith 1"
Type	You can create accounts for different purposes, for example, trip account, course account, etc. The account Type is displayed here.
Balance	The current Balance of this account will be displayed. If the customer has multiple accounts, the sum of their balances will equal the total amount owing by or owed to the customer.
Credit Limit	The customer is not allowed to accrue sales greater than the Credit Limit value on the account. The total credit limit of the account is displayed.
Closed Date	If this account is no longer active, the Closed Date is displayed here.

Special Orders

When adding an item to the shopping basket you may find that you are temporarily out of stock of a particular stock item and need to order more units. To prevent the newly ordered items from being sold to another customer when they are received, you can set up a customer order (i.e. special order). This reserves the item and marks it as being linked to the customer on the Purchase Order.

You can view the items a customer has on order in the Special Orders section. Special orders are further classified by the following statuses: Not Yet Added to Purchase Order, Purchase Order Not Yet Sent, Purchase Order Sent, Received but not Picked Up. All items that the customer has ordered and that he/she has not yet received are shown. The Purchase Order # column indicates whether the item has been added to a Purchase Order already.

You cannot create/edit new special orders here. This must be done through the Sales Module as described in Selling Stock Items (See Section 6.1.1.Selling Stock Items).



Double click on a special order to review/edit the specific details on the order.

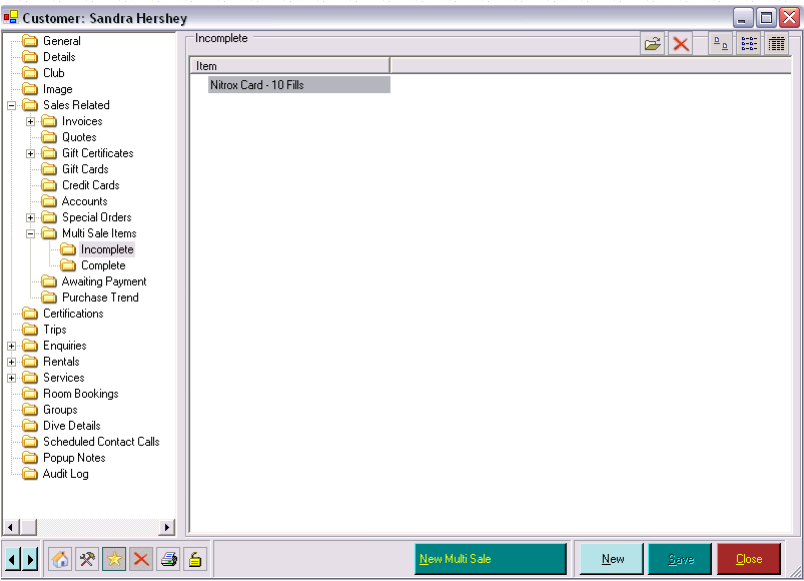
Stock #	The Stock # of the item the customer has ordered is displayed.
Description	The Description of the stock item is displayed.
Stock Type	The Stock Type of the stock item is displayed.
Manufacturer	The Manufacturer of the stock item is displayed.
Order Date	The original Order Date of the stock item is displayed. This is the date the customer ordered the item, not necessarily the date the item was added to a

	Purchase Order.
Qty	The Quantity the customer has requested of this stock item is displayed.
Purchase Order#	If this item has already been ordered from a supplier for the customer, the Purchase Order # used to order the item is displayed.

Multi-Sale Items

All of the multi-sale items that have been created for a customer are displayed in the Multi-Sale Items section.

Select the New Multi-Sale Item to create a new item for a customer as described in Selling Multi-Sale Items (See Section 6.1.9.Selling Multi-Sale Items).

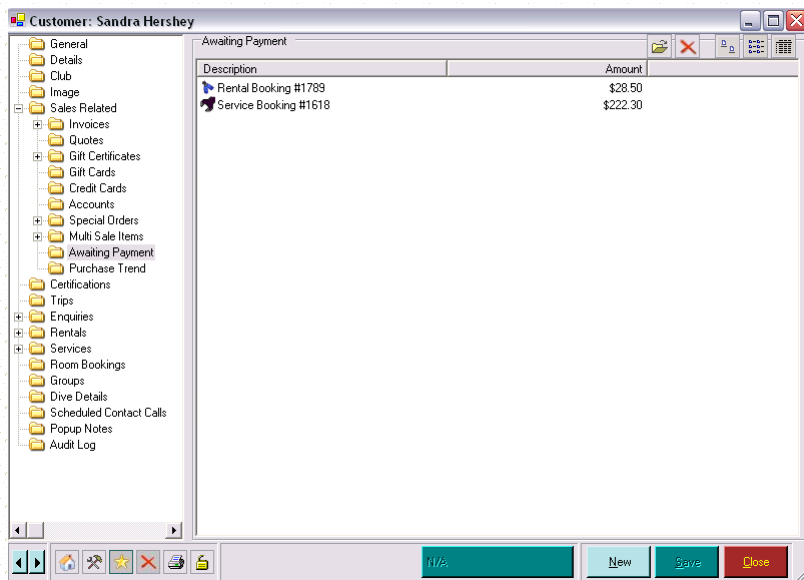


Double click on an item to review/edit the specific details on the item

Item	The description of the Multi-Sale Item is displayed here.
------	---

Awaiting Payment

All rental and service bookings which are currently awaiting payment (i.e. have not been added to an invoice) are displayed.

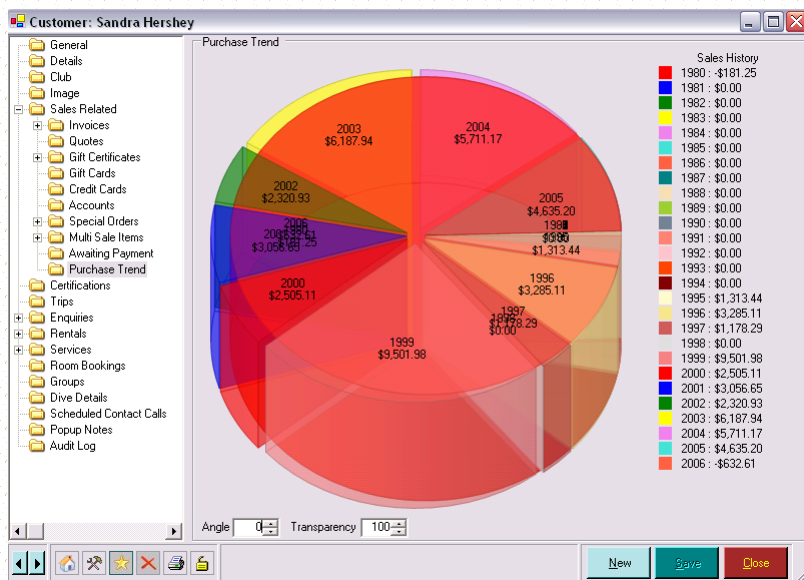


Double click on an item to review/edit the specific details on the item or to send the booking to an invoice and collect payment.

Description	The Rental or Service Booking number is displayed.
Amount	The amount awaiting payment is displayed.

Purchase Trend






The Purchase Trend section gives you a quick view of the purchases associated with this particular customer for the last 10 years (or from the date of the earliest invoice if you imported your data). You can view as a barchart or a pie chart.



7.2.5 Adding Certifications

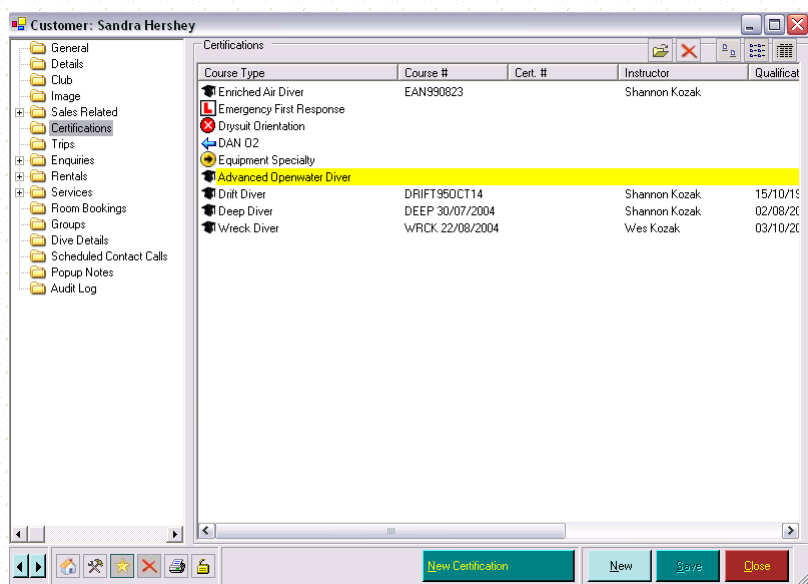
The Certifications section of the Customers Module shows details of courses that the currently selected person has attended and is attending. EVE automatically adds a row when a course is sold in the Sales Module or a person is manually added to a course in the Courses Module.

Certifications

EVE automatically adds a row to the grid for the person when you register him/her on a course (usually done in the Sales Module). Rows that represent a completed certification (i.e. qualified) are marked with a  symbol. Rows that represent a failed certification are marked with a  symbol. Rows that represent ongoing training are marked with a  symbol. Rows that represent a customer that has been referred to another store are marked with a  symbol. Rows that represent a customer that has moved to another course within your store are marked with a  symbol.

The highest certification core level (DSD, Open Water Diver, Advanced Diver, Rescue Diver, Divemaster, Instructor, IDC Staff Instructor, Course Director) for which the customer is certified will be highlighted in yellow. Other certifications (for example, Boat Diver, etc) are not highlighted. You can choose which course types are appropriate for this highlighting and which course types supercede others by assigning a Certification Priority value on the Course Type form - see section 4.4.8.

The customer must be qualified in order for the highlighting to occur (for example, if they are certified in AOW and are taking a Rescue course, the AOW will be in yellow.)



Double click on a Certification line to review/edit the specific details.

Course Type	The Course Type for the specific certification is displayed.
Course #	The Course # for the course the customer took to achieve the certification is displayed.
Cert #	The customer's Certification # for the certification level is displayed.
Instructor	The certifying Instructor is displayed.
Qualification Date	The date the customer was Qualified (i.e. the certification date) is displayed.
Enrollment Status	The Enrolment Status of the customer in the certification course is displayed - this is most useful while the course is still ongoing and indicates whether the customer is enrolled, provisionally enrolled or on the waiting list.
Completion Status	The completion Status of the customer in the course is displayed - i.e. one of Ongoing, Qualified, Failed, Referred, Moved Course.
PIC Status	The status of the PIC processing is displayed. This can be one of Pending (i.e. not yet submitted to the PIC), Notified by On-Line PICs, Notified by Post, Do Not Upload. Only certifications where the customer successfully completed

the course and that are marked as Pending will be uploadable onto On-Line PICs.

Delete a certification by highlighting the row and pressing the Delete key on your keyboard.

New Certification

You can add a row manually for the selected person by using the **New Certification** button. You will probably only want to do this to record certifications obtained by the person prior to your purchase of EVE or for those that obtained their certification at a different store since EVE will automatically add certifications for you during the Course process.

The screenshot shows a software window titled "Certification: (New #1)". It has four tabs: "General", "Enrollment", "PIC Online", and "Money". The "General" tab is active. It contains several input fields: "ID (New #1)" (empty), "Customer*" (John Scarlett), "Course Type*" (Open Water Diver), "Certification #" (9912716576), "Certification Date" (Monday, May 19, 2003), "Instructor" (Briana Salis), and "Status*" (Certified). Each field has a magnifying glass icon for search. To the right of these fields is a large "Notes" text area. Below the fields are buttons for "Attendance Record", "New", "Save", and "Close". At the bottom right, there are labels for "Created" and "Last Updated".

Enter the basic information about customer certifications on the General tab.

Customer	The Customer you have selected is defaulted. You can change the customer by using the Customer Search box.
Course Type	The Course Type for the specific certification is entered. You can select course types from the pop up list box.
Certification #	The customer's Certification Number for the specific certification level is entered / displayed here.
Certification Date	Enter the Date that the customer qualified. When a new record is added, this defaults to today's date. When you mark a course as complete, if the customer successfully completed the course, today's date is used for the Cert Date.
Instructor	Pick the name of the certifying Instructor from the pop up list box.
Status	Enter the Completion Status for the customer. If a customer has been enrolled in the course through the Sales Module and the course is not yet marked as complete, the status will default to Ongoing. If you are entering a New Certification, the status will default to Certified.
Notes	Enter any Notes relevant to the customer's certification.

Enrollment tab

You can enter extended information on the Enrollment tab

Enrollment Status	Select the Enrollment Status for the course from the pop up list box.
Course #	When you register a person on a course by selling it in the Sales Module, EVE puts the Course # in for you. Otherwise, enter the course number here.
E-Learner	Put a tick in the box if the customer is taking the course on-line
Pre-Registration	Put a check mark in this box if the customer was Pre-Registered for certification with PADI.
Took the Course Here?	Check this checkbox if the customer completed their training with you.
Referral?	If the customer was referred from another store, check the <i>Referral</i> checkbox and enter the store number that (s)he was referred from and the Referring instructor number. You can also enter the name of the referring store and its email address.
From Store #	
Referring Instructor #	
Store Name	
Store Email	

PIC OnLine tab

PIC Status	<p>Enter the PIC Processing Status from the pop up list box. PIC Status will default to whatever value you have chosen as the default status on the Courses tab of the Options form - see section 4.3.5. Other alternatives include:</p> <ul style="list-style-type: none"> ❖ Notified by Post: You have already notified PADI about the customer certification by post ❖ Notified On-Line: You have already notified PADI about the certification by uploading data directly over the internet using EVE's interface to PADI's On-Line PICs. ❖ No Notification: PADI are not to be notified about the certification. If you wish, you can choose this option temporarily and then change it to one of
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	<p>the other options at a later date.</p> <p>❖ Pending: PADI have not yet been notified about the certification. i.e. it is available to be submitted.</p>
PIC Card	Choose the type of certification card type the customer wants to receive.
Return Card To	Choose where PADI should return the certification card to. Options are : Instructor, Store, Student.
PIC Sent By	Choose which staff member was responsible for processing the PIC. If you submitted the certification using EVE's interface to PIC Online, EVE will set this to the employee who is logged in.
Date PIC Sent	Enter the Date the PIC was sent to PADI. This date will automatically default when you use EVE's interface to PICs OnLine.
Date Cert Card Rec'd	If certification cards are returned to the store enter the date the card was received by your store.
Picked up by Student	If the card was picked up from the store by the student, enter the date that happened.
Pick-Up Method	
Touch ID	If the student is taking the course using PADI's Touch app, enter their Touch ID here.
Father's Name	It is a requirement in Greece that the Father's name is entered on all PICs sent to PADI. If your store is in Greece a tab called 'Father' will be displayed in the PIC OnLine section and you can enter the Father's name there.

Money tab

Course Price Pre-Tax	When you enroll a customer in a course through the Sales Module, information about the price you charged for the course is displayed here. The full price charged for the course (pre-tax, tax only and total price) is displayed along with any payments the customer has made against the course price. The total Amount Owning is the Total Course Price less the Total Paid.
Course Price Tax	
Course Price Total	
Paid Pre-Tax	
Paid Tax	
Paid Total	
Amount Owed	
Show Invoices	Click this button to see a list of invoice(s) that the enrollment was purchased on. Multiple invoices will be shown if the customer paid in installments.

All of the above fields are optional except the certification level itself. However, if you are planning to upload PIC details from EVE to PADI using PIC Online you need to add at least the certification date and instructor.

Attendance Record

You can use this section to track individual attendance details on a course. Use the **Attendance Record button** to access this form. You can also track attendance in the Courses Module by selecting the specific course and

using the Attendance Record on the Customers tab. When a course is completed, EVE will check to see if the customer has attended all modules and will warn you if module(s) are outstanding..

The Course and the Customer will be displayed at the top of the form.

Module Type	All of the Modules related to this course are displayed.
Attended?	Use the <i>Attended?</i> checkbox to track customer attendance at a particular module. You can click the Select All button and Deselect All button to quickly make your selections.
Test Score	Enter the Test Scores associated with any modules that have exams or quizzes.
Notes	Enter any Notes associated with the specific module.

7.2.6 Reviewing Trip Details

The trips section of the Customers Module shows details of trips that the currently selected person is enrolled on or has attended. EVE automatically adds a row when a trip is sold in the Sales Module or a person is manually added to a trip in the Trips Module.

New trip enrollments cannot be added here but must be added in the Trips Module as described in Creating a New Trip.

Trips

EVE automatically adds a row to the grid for the person when you register him/her on a trip (usually done in the Sales Module).

Customer: Sandra Hershey

Destination	Trip #	Price Paid	Tax Paid	Special Arrange...	Trip Price
Port Hardy - B...	Port Hardy Oct03	\$0.00	\$0.00		\$0.00
Exotic Advent...	Fiji & Vanuatu N...	\$0.00	\$0.00		\$0.00
Hornby Island ...	Hornby Island S...	\$0.00	\$0.00		\$0.00
Hornby Island ...	Hornby Island S...	\$0.00	\$0.00		\$0.00
Hornby Island ...	Hornby Island S...	\$0.00	\$0.00		\$0.00
Port Hardy - B...	Port Hardy Oct01	\$0.00	\$0.00		\$0.00
Chaudiere -	Skookumchuk ...	\$0.00	\$0.00		\$0.00
Hornby Island ...	Hornby Island S...	\$0.00	\$0.00		\$0.00
Hornby Island ...	Hornby Island S...	\$0.00	\$0.00		\$0.00
Exotic Advent...	Cozumel Sep01	\$0.00	\$0.00		\$0.00
Chaudiere -	Chaudiere Oct04	\$95.00	\$6.65		\$95.00
Hornby Island ...	Hornby Island S...	\$389.00	\$27.23		\$389.00
Port Hardy - G...	God's Pocket M...	\$1,049.00	\$73.43		\$1,049.00
Hornby Island ...	Hornby Island S...	\$575.00	\$40.25		\$575.00
Nanaimo - Div...	Cape Breton & S...	\$200.00	\$14.00		\$100.00
Exotic Advent...	Bonaire	\$0.00	\$0.00		\$0.00
Hornby Island ...	Sea Lions Jan 1...	\$399.00	\$27.93		\$399.00
Port Hardy - B...	Port Hardy Sep ...	\$1,395.00	\$97.65		\$1,395.00
Nanaimo - Div...	Nanaimo Aug04	\$100.00	\$7.00		\$100.00
Barkley Sound...	Barkley Sound A...	\$559.00	\$39.13		\$559.00
Port Hardy - G...	Port Hardy May04	\$996.00	\$69.72		\$996.00
Hornby Island ...	Hornby Island S...	\$589.00	\$41.23		\$589.00
Barkley Sound -	Barkley Sound - ...	\$0.00	\$0.00		\$0.00
Gabriola Island...	Gabriola Sep03	\$0.00	\$0.00		\$0.00

Navigation buttons: New, Save, Close

By double clicking on a row, you are taken to the Trip where you can edit trip details.

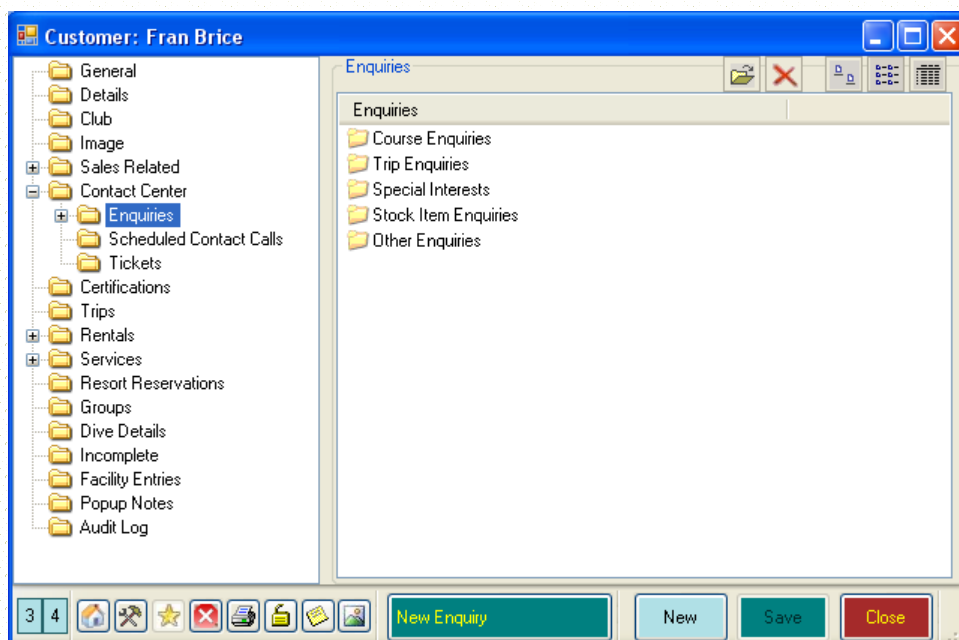
Destination	The Destination associated with the trip you selected will display here.
Trip #	The Trip Number of the specific trip is displayed.
Price Paid	The Price Paid (pre-tax) and Tax Paid will be displayed. This is the amount for the trip that has currently been charged to the customer’s account and may not be the full trip price (for example, if the customer is making payments by deposit or installment)
Tax Paid	
Special Arrangements	Any Special Arrangements that have been identified for the customer are displayed, for example, vegetarian diet, etc.
Trip Price	The Total Price (pre-tax) and Total Tax for the trip will be displayed.
Trip Tax	
Start Date	The Start Date & Time and End Date & Time for the trip are displayed.
End Date	

7.2.7 Tracking Customer Enquires

Use the Enquiries section to track customer interest in courses, trips, stock items, or other areas. You can use this information to analyze your customer’s interest areas and offer products and services to meet their needs. In addition, you can track follow-up activities, schedule reminders and track the results of customer contacts.

Enquiries

Enquiries are further sub categorized into Course Enquiries, Trip Enquiries, Special Interest Enquiries, Stock Item Enquiries, and Other Enquiries.

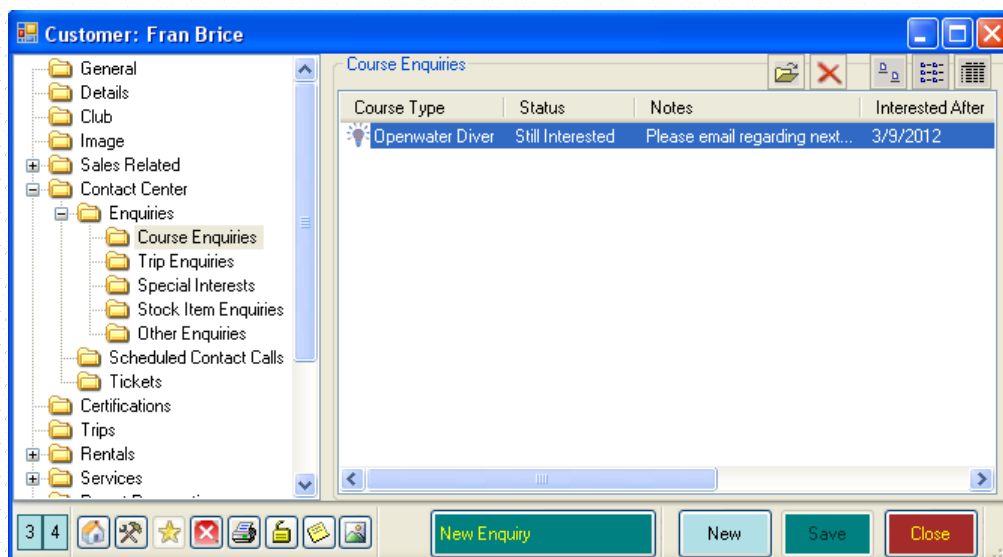


Double click on any of the enquiries folders to view information about the customer's interest in that area.

Course Enquiries

Use this section if a customer enquires about a particular course. You can enter new enquiry details and view existing enquiries made by the customer.

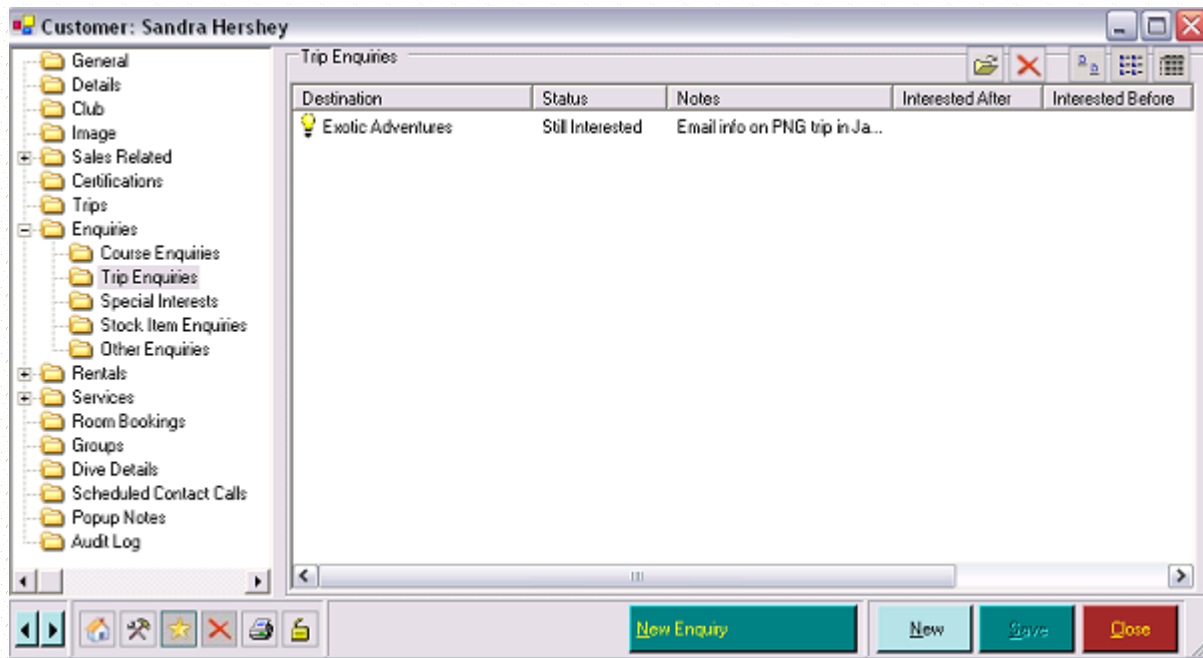
If you checked the *Add Interest on Course Completion* checkbox when Setting Course Options (See Section 4.3.5.Courses Options), each time you set a course status to Complete you will be given the option to Add Interest to con-ed courses to the Customer. Any you specify will be listed here.



Course Type	The Course Type for the specific enquiry is displayed.
Status	The Status of the enquiry is displayed. For example, the customer may be still interested, no longer interested or the enquiry may be resolved.
Notes	Notes regarding the enquiry are displayed.
Interested After	If the customer has a time frame in which their enquiry is valid, the Interested

Interested Before	After and Interested Before dates will be displayed. For example, a customer may be interested in enrolling their child in a Junior Open Water course during summer holidays. You would enter the first date of the holiday in Interested After and the last date of the holiday in Interested Before.
Employee	The Employee who originally captured the enquiry is displayed.

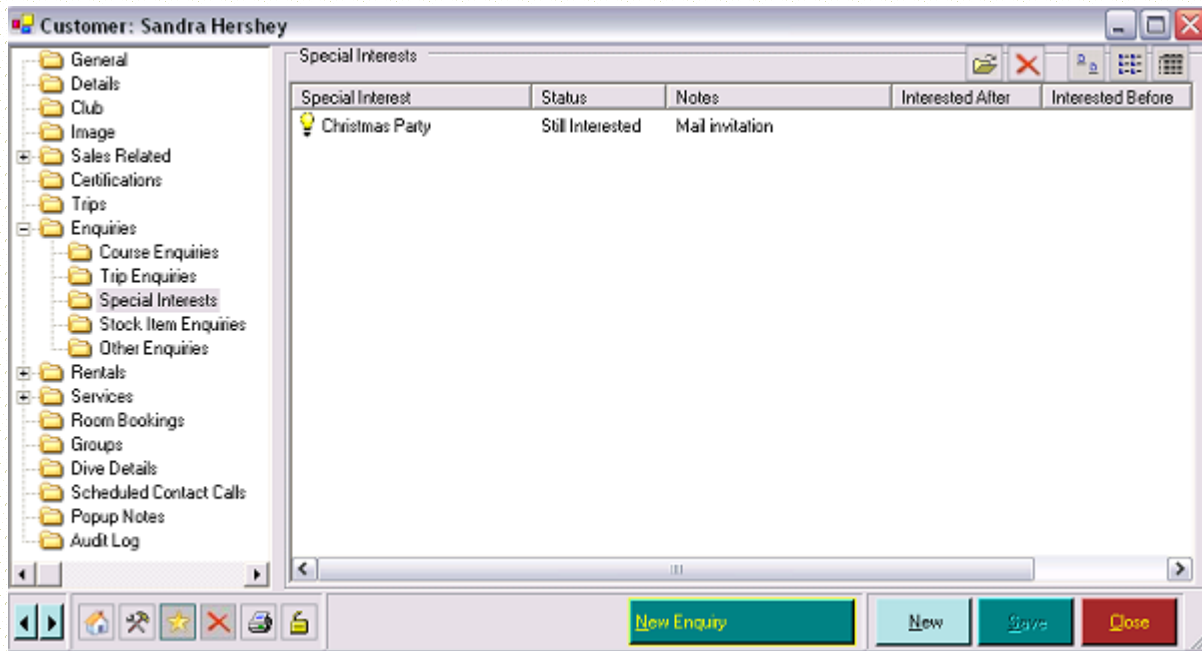
Trip Enquiries



Destination	If the customer has identified a specific Destination on their enquiry, it will be displayed here.
Status	The Status of the enquiry is displayed. For example, the customer may be still interested, no longer interested or the enquiry may be resolved.
Notes	Notes regarding the enquiry are displayed.
Interested After	If the customer has a time frame in which their enquiry is valid, the Interested After and Interested Before dates will display. For example, a customer may be interested in taking a trip during the month of September. You would enter the first of September in Interested After and the last day of September in Interested Before.
Interested Before	
Employee	The Employee who originally captured the enquiry is displayed.

Special Interest Enquiries

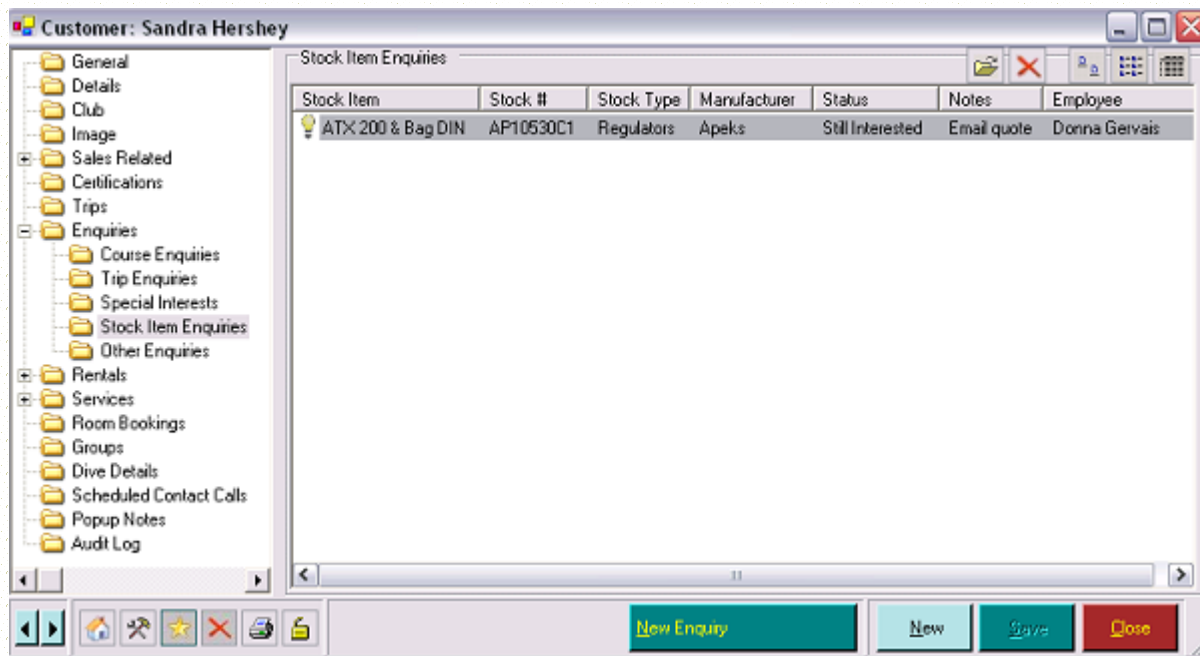
You can track special interests of customers if you want to offer activities outside of diving to your customers - for instance you may organize a golf day or a ski holiday, etc.



Special Interest	The specific Special Interest area the customer is interested in is displayed.
Status	The Status of the enquiry is displayed. For example, the customer may be still interested, no longer interested or the enquiry may be resolved.
Notes	Notes regarding the enquiry are displayed.
Interested After	If the customer has a time frame in which their enquiry is valid, the Interested After and Interested Before dates will be displayed. For example, a customer may be interested in joining you on a golfing/diving adventure but only during the summer months. You would enter the first date of summer in Interested After and the last date of summer in Interested Before.
Interested Before	
Employee	The Employee who originally captured the enquiry is displayed.

Stock Item Enquiries

You can use the Stock Item Enquiries section to track stock items in which the customer has expressed an interest. You can think of this as a Gift Registry area.



Stock Item	The specific Stock Item the customer has enquired about is displayed.
Stock #	The store Stock # associated with the stock item is displayed.
Stock Type	The Stock Type associated with the stock item is displayed.
Manufacturer	The Manufacturer of the stock item is displayed
Status	The Status of the enquiry is displayed. For example, the customer may be still interested, no longer interested or the enquiry may be resolved.
Notes	Notes regarding the enquiry are displayed.
Employee	The Employee who originally captured the enquiry is displayed.

Other Enquiries

Use this section to keep track of any other enquiries the customer has made about your goods or services.

Status	Notes	Employee
Still Interested	Call re: art show at Aquarium	Donna Gervais

Status	The Status of the enquiry is displayed. For example, the customer may be still interested, no longer interested or the enquiry may be resolved.
Notes	Notes regarding the enquiry are displayed.
Employee	The Employee who originally captured the enquiry is displayed.

New Enquiry - General

New Enquiries can be added clicking the **New Enquiry** button.

Employee	Enter the name of the Employee entering the customer interest. If you selected the <i>Default Employee on New Records</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the employee who is logged on will default. You can select a different employee from the pop up list box.
Customer	Enter the name of the Customer making the enquiry. The name of the selected customer will default. You can choose a new customer from the

	Customer Search box.
Contact Method	Enter the method that the customer used to contact you to make the enquiry. You can select Contact Methods from the pop up list box. If the contact method used is not listed, you can add a new one using the New Contact Method button on the pop up list box.
Status	Enter the Status of the enquiry. The status will default to Still Interested on a new enquiry. As you follow up with the customer on this enquiry, change the status to reflect the contact activities.
Enquiry Type	<p>Choose the Enquiry Type. This will be used to categorize enquiries on the summary screen. As you select different enquiry types, additional selection fields may become available.</p> <ul style="list-style-type: none"> ❖ Courses: Course Type selection box becomes active. Select the Course Type from the pop up list box. ❖ Trip: Destination selection box becomes active. Select the Destination from the pop up list box. ❖ Special: Special Interest selection box becomes active. Select the Special Interest from the pop up list box. ❖ Stock Item: Stock Item selection box becomes active. Select the Stock Item from the Stock Search box. Stock Item Description, Stock #, Stock Type and Manufacturer are displayed. ❖ Other: there are no additional fields for this enquiry type
Notes	Add any Notes regarding the enquiry. Usually you will enter the specific question or information the customer is requesting here.
Interest Only If After/Before	The person may only be interested in taking a course or joining a trip if it is run before or after certain dates. Both fields can be left blank if the person has no date restrictions on their enquiry.

New Enquiry - Follow Up

You will usually want to schedule a follow-up call to update the customer with details about their enquiry. Click on the **Follow-Ups** tab to view details of contact calls that have already been scheduled and click on the **Schedule Follow-Up Call/Email button** to create a new one.

The screenshot shows a software window titled "Enquiry: Sandra Hershey (Rescue Diver)". It has two tabs: "General" and "Follow-Ups". The "Follow-Ups" tab is selected, displaying a table with the following data:

Employee	Proposed Date	Actual Date	Action	Notes
Donna Gervais	07/05/2006 10:57:00 ...		Call Back	

Below the table, there is a "Schedule Follow-Up Call/Email" button and three buttons: "New", "Save", and "Close".

Employee	The name of the Employee responsible for the follow-up will be displayed.
Proposed Date	The Proposed Date of the contact is displayed.

Actual Date	The Actual Date of the contact (if completed) is displayed.
Action	The Action to be taken (for example, Send Information, Call Back, etc) is displayed.
Notes	Any Notes regarding the follow up with the customer are displayed.

7.2.8 Adding Rental Data

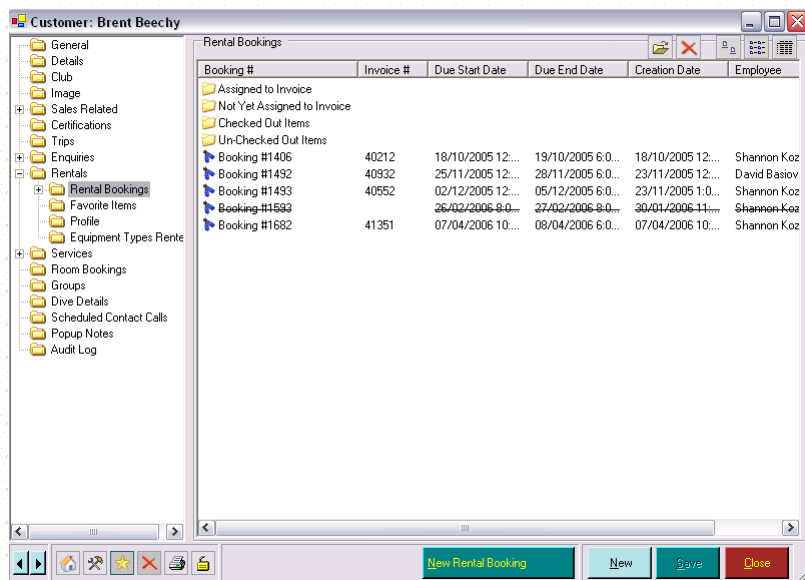
Rental Bookings

A list of all rental bookings associated with this customer is displayed. To help you manage sorting through Rental Bookings, they are further categorized as

- ❖ Assigned to Invoice
- ❖ Not yet Assigned to Invoice
- ❖ Checked Out Items
- ❖ Un-Checked Out Items

Bookings that have been voided are shown ~~crossed-out~~.

You can click **New Rental Booking** to create a new rental booking for the customer as described in Rental Bookings (See Section 11.1.Rental Bookings).

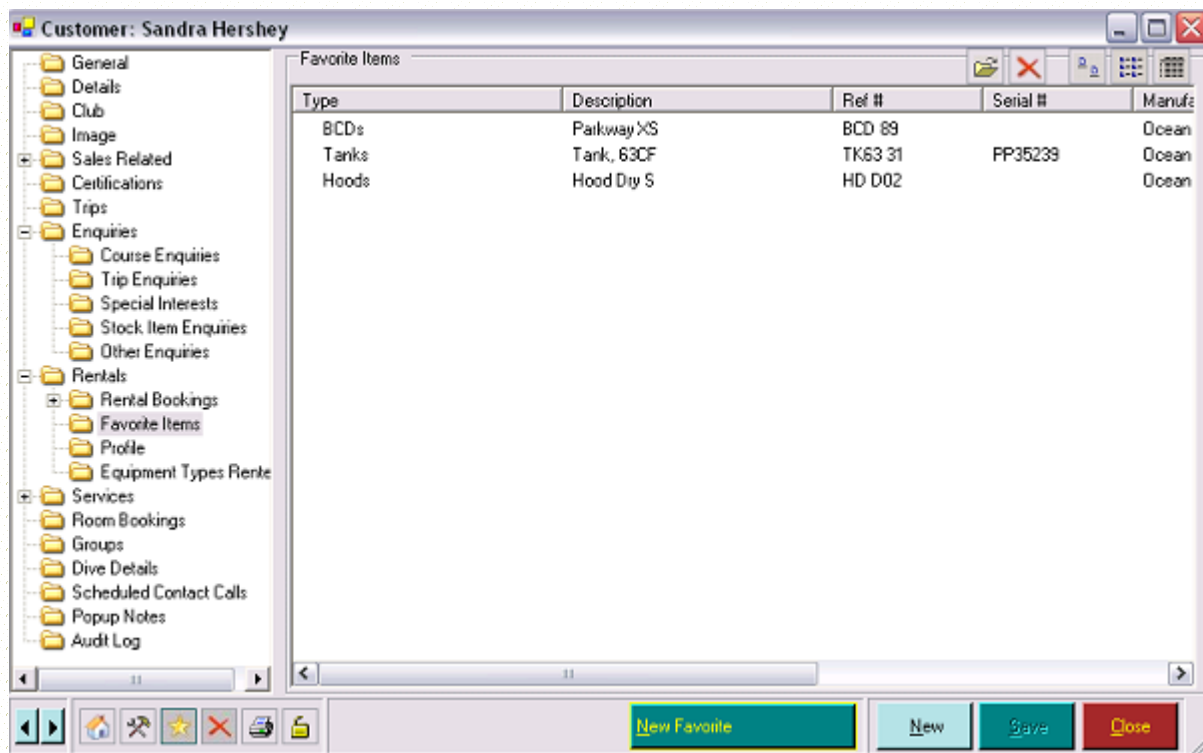


You can double-click on any rental booking to view the specific details about the booking and to make any additions or changes required.

Booking #	The Booking # of the rental booking is displayed.
Invoice #	If the booking has been processed on an invoice, the Invoice # is displayed.
Due Start Date	The Planned Start and End Date of the booking (not necessarily the actual start and end of the rental) are displayed.
Due End Date	
Creation Date	The date that the rental booking was created is displayed.
Employee	The Employee who originally created the rental booking is displayed.

Favorite Items

A list of all of the Favorite Rental items associated with this customer is displayed. You can use Favorites to quickly populate a rental booking with the customer's favorite gear in the Rentals Module.



You can double-click on any item to view the specific details about the item and to make any additions or changes required.

Type	The Stock Type of the equipment item is displayed.
Descriptions	The Description of the stock item is displayed.
Ref #	The specific Reference Number (the unique identifier) is displayed.
Serial #	The Serial Number of the equipment item (if any) is displayed.
Manufacturer	The Manufacturer of the equipment item is displayed.
Size	The Size of the favorite equipment item is displayed.
Primary Colors	The Primary Color of the equipment item is displayed.
Secondary Colors	The Secondary Color of the equipment item is displayed.

New Favorite Item

You can create a new Favorite Item using the **New Favorite** button.

Favorite Rental Item: (New #3)

Customer: Alice Applebaum

Stock Type: Regulators

Favorite Item: Sherwood

Manufacturer: Sherwood

Serial #: RM098679/MM876903

Ref #: 06

Description: Blizzard/Magnum/3 Gauge Conso

Size:

ID: 7

Created:

Last Updated:

Buttons: New, Save, Close

Enter information about the customer's favorite rental gear.

Customer	The Customer you previously selected is displayed.
Stock Type	Select the Stock Type from the pop up list box. Only Stock Types that have been marked For Rent will be displayed here.
Manufacturer	Use the Selection button to select the specific piece of rental gear that is the customer's favorite. Details about the equipment item will be displayed including the Manufacturer, Serial Number, Reference Number, Description, Size and ID number.
Serial #	
Ref #	
Description	
Size	

Profile

Use the Profile to create a standard rental profile for the customer. You will list information about the typical gear the customer rents and which size. This can then be used in the Rentals Module to quickly populate a rental booking with the customer's required equipment and in the Courses and Trips module when creating Requirements.

Customer: Sandra Hershey

- General
- Details
- Club
- Image
- Sales Related
- Certifications
- Trips
- Enquiries
 - Course Enquiries
 - Trip Enquiries
 - Special Interests
 - Stock Item Enquiries
 - Other Enquiries
- Rentals
 - Rental Bookings
 - Favorite Items
 - Profile
 - Equipment Types Rente
- Services
 - Room Bookings
 - Groups
 - Dive Details
 - Scheduled Contact Calls
 - Popup Notes
 - Audit Log

Profile

BCDs		[Any]	S	XS	M	XL	L
Boots		[Any]	07 (S)	08 (M)	06 (XS)	04 (XXXS)	05 (XXXS)
DPVs		[Any]					
Drysuits		[Any]	MLS	ML	MS	MLT	LS
Fins (Closed Heel)		[Any]					
Gloves		[Any]	S	M	L	XL	XXS
Hoods		[Any]	M	L	S	XS	XL
Masks		[Any]					
Tanks		[Any]					

New Save Close

Equipment Types that have been marked *For Profile* when Setting Rental Options (See Section 4.3.7. Rentals Options) will be shown in the profile along with the appropriate sizes for each type of gear (from Stock Types). Highlight the size of the gear that the customer needs by clicking on a specific size box. If the customer does not require a specific size (for example with a regulator) click on the **Any** button. You can make notes in the note box regarding the customer's requirements.

Equipment Types Rented

View the Equipment Types Rented section to see the number of times a customer has rented different types of equipment. You can use this, for example, in your sales pitch to encourage customers to invest in their own gear.

Customer: Steve Dunn

Type	Count	Total Spent
Tanks	3	\$17.18
Drysuits	10	\$91.40
BCDs	13	\$80.09
Regulators	13	\$51.46
Weight Belt & Weights	4	\$45.65

New Save Close

You can double click on any equipment type to edit/update the information associated with that Stock Type.

Type	The various equipment Types are listed. Only those stock types that have been marked For Rent are listed here.
Count	The number of times the customer has rented this type of equipment is displayed.
Total Spent	The Total Amount Spent (including tax) on each equipment type is displayed.

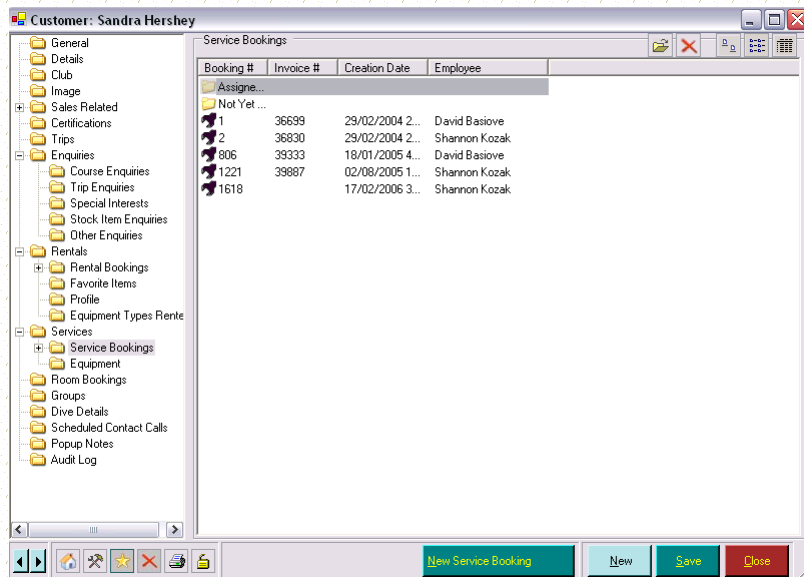
7.2.9 Adding Service Data

Service Bookings

A list of all service bookings associated with this customer is displayed. To help you manage sorting through Service Bookings, they are further categorized as

- ❖ Assigned to Invoice
- ❖ Not yet Assigned to Invoice

You can select New Service to create a new service booking for the customer as described in Service Bookings.

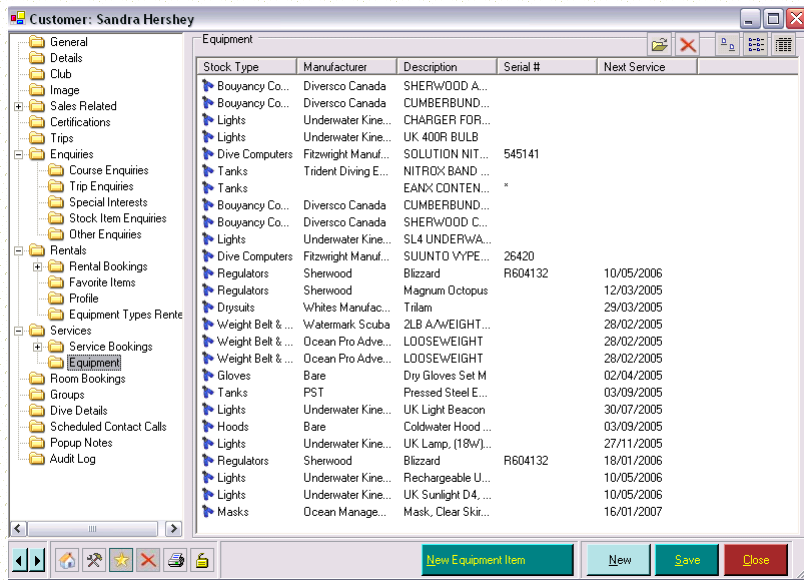


You can double-click on any service booking to view the specific details about the booking and to make any additions or changes required.

Booking #	The Booking # of the service booking is displayed.
Invoice #	If the booking has been processed on an invoice, the Invoice # is displayed.
Creation Date	The date that the service booking was Created is displayed.
Employee	The Employee who originally created the service booking is displayed.

Equipment

A list of all of the Equipment items owned by this customer is displayed. You can use Equipment to quickly populate a service booking with the customer's gear in the Services Module. When you sell an item to a customer that is marked For Service, it will automatically appear in this list.



You can double-click on any piece of equipment to view the specific details about the equipment and to make any additions or change required.

Stock Type	The Stock Type of the equipment item is listed. Only those Stock Types marked For Service are available to be added to the Customer's equipment list.
Manufacturer	The Manufacturer of the customer's equipment item is displayed.
Description	A Description of the customer's equipment item is displayed.
Serial #	If the equipment item has a Serial #, it is displayed here.
Next Service	The Next Service Date for the piece of equipment is displayed here. When you add a piece of equipment, you will identify the next service date. Each time that piece of equipment is brought in for service, you will have the option to set the next service date when you invoice the service booking. If you checked the <i>Automatically Apply Next Service Date And Pickup Date checkbox</i> when Setting Service Options (See Section 4.3.8.Services Options), the next service date will be automatically set based on the service period you identified in Stock Types (See Section 5.1.6.Stock Types).

New Equipment Item

You can create a new Equipment Item using the **New Equipment** button. Note: you would usually create new items of customer equipment as part of the Service Booking process (see section 12.1.1) but you can do it here also if you wish.

Stock Type	Choose the Stock Type of the piece of equipment from the pop up list box. Only types marked as For Service in Stock Types (See Section 5.1.6.Stock Types) are shown in the list.
Manufacturer	Choose the Manufacturer of the equipment item from the pop up list box.
Description	You will probably want to give a Description for the customer's gear. Enter text to identify the item, if appropriate.
Serial #	Enter the item's Serial Number, if applicable
Primary Color	Choose the Primary Color from the pop up list box.
Secondary Color	Choose the Secondary Color from the pop up list box.
Size	Choose the Size from the pop up list box. Only sizes appropriate to the stock type identified above will be listed.
Owner	The Owner will be identified as the Customer you had previously selected. It cannot be changed here.
Date Purchased	Enter the date the equipment item was purchased
Date Sold	If the customer no longer owns the piece of equipment, you can enter a Date Sold.
Next Service	The date the equipment item next needs to be serviced. By booking Customer Equipment in the Services Module, the Next Service date will be set automatically based on the service period you set in Stock Types.
Net Worth	The resale value (before tax) of the item.
Bypass Double Booking Check?	<p>This field is not relevant to customer owned equipment and should be left unchecked.</p> <p>This same form is used to create Rental Equipment as well as Customer Equipment. For Rental Equipment, most items should have the box unchecked to indicate a check will be made when adding it to a new rental or service booking that it is not already booked out in the same period. For some items this check is not relevant, for example, if you have an item called 'Any' to indicate for example, that Any 2lb weight will do for customer X.</p>

Equipment History

Booking Type	Booking #	Due Start Date	Due End Date	Actual Start Date	Actual End Date
Service	2	28/02/2004 2:13 PM	06/03/2004 2:08 PM		29/03/2004 8:35 A
Service	1618	17/02/2006	03/03/2006		14/03/2006 11:40

Rental Count: 0. Service Count: 2

Buttons: Stock Item, New, Save, Close

This page will populate over time as the piece of equipment is booked for service and is not editable. You can view customer equipment history.

7.2.10 Resort Reservations

Resort Reservations

A list of all resort reservations associated with this customer is displayed.

You can add a new resort reservation using the **New Booking** button as described in Resort Reservations (See Section 13.1. Resort Reservations). Normally, however, you would sell a Resort Reservation (see section 6.1.12)

Room Bookings

Arrival Date	Departure Date	Checked In	Checked Out	Hotel	Room #
08/05/2006 10:21:00 AM	12/05/2006 10:21:00 AM			Diversity Dive Hotel	<116>

Buttons: New Room Booking, New, Save, Close

You can double-click on any resort reservation to view the specific details about the booking and to make any additions or changes required.

Arrival Date	The date and time the customer is expected to Arrive & Depart is displayed.
Departure Date	
Checked In	The actual Check In / Check Out date and time is displayed.
Checked out	
Hotel	The Hotel that the customer is staying at is displayed.

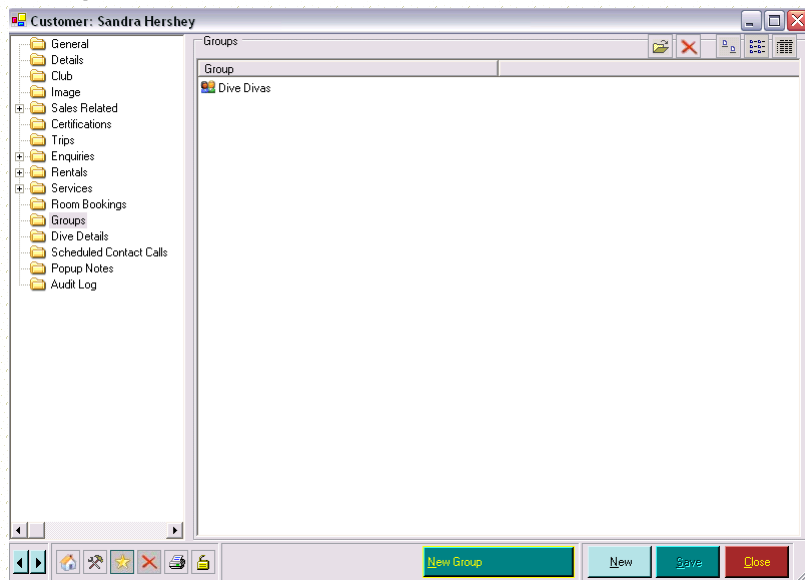
Room #	The specific Room Number the customer is staying in and the nightly rate they are paying is displayed.
Nightly Rate	
Flight # In	Flight Details for the customer are displayed.
Flight # Out	
Flight Arrival Date	
Flight Date Departure	

You can click **New Resort Reservation** to create a new resort reservation for the customer.

7.2.11 Grouping Customers

If the customer is part of a group you can link all members of the group with a common Group name. You could use the name of the group leader as the group's name.

Groups



All of the groups a customer is a member of are displayed.

New Group

You can add new Groups by clicking the **New Group** button.

Group: Dive Divas

ID: 1

Group Name: Dive Divas

Start Date: May 7, 2006

End Date: May 7, 2006

Unavailable? ☐

Created: 07/05/2006 10:23:37 AM

Last Updated: 07/05/2006 10:23:37 AM

Customer	Tel (H)	Tel (W)	Tel (M)
Jennifer Saigle	604 555-7811		604 617-1
Sandra Hershey	604 555 6592		604-555-8
Debra Beard	604 555 8888		
Bonney Gaalaas	780 555 4887		

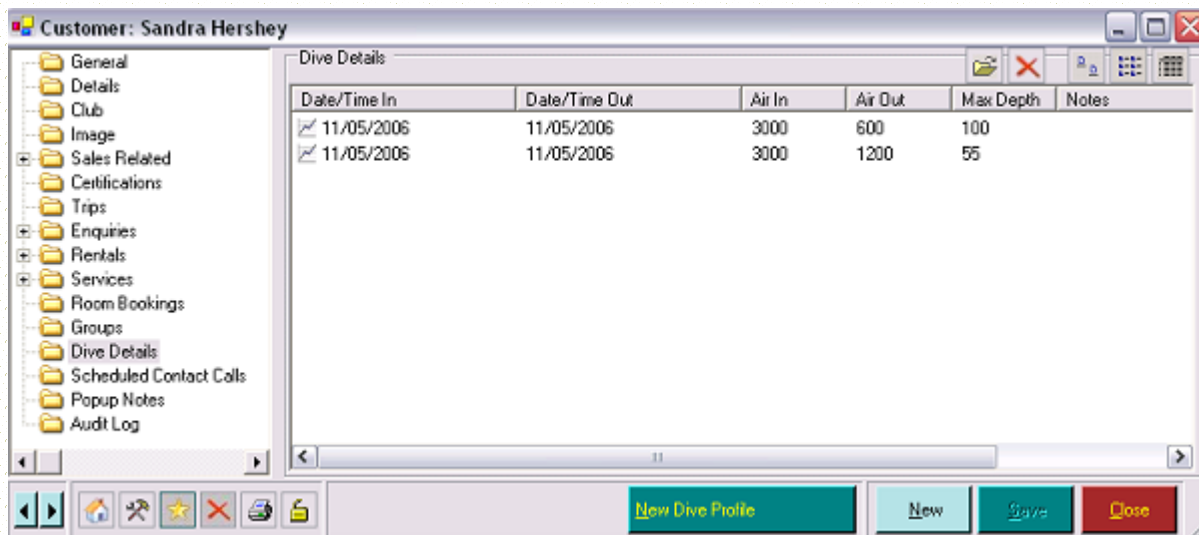
Buttons: Add, Remove, Open Member(s), New, Save, Close

Group Name	Enter the Group Name. This will <i>Default</i> to the format that you identified when Setting Group Options (See Section 4.3.10.Groups Options).
Start Date	If the group has a fixed Start and End Date, enter the dates here. For instance, at a resort a group leader may bring a different group of customers each year so the group is only appropriate within a small date range.
End Date	
Members Customer	<p>You can add Customer's to the group here by clicking the Add button. Highlight a customer and click the Remove button to remove a customer from the group. The Open Member(s) button will open a specific group member's customer file.</p> <p>Contact Details for the member are automatically displayed.</p> <p>Highlight one or more group members and click the:</p> <p> icon to create a New Email to the selected customer(s)</p> <p> icon to send a New Text message to the selected customer(s)</p> <p> icon to Export information on the selected customer(s)</p> <p> icon to create new Invoice(s) for the selected customer(s)</p> <p> icon to create new Rental Bookings(s) for the selected customer(s)</p> <p> icon to create new Service Bookings(s) for the selected customer(s)</p> <p> icon to copy information about the selected customer(s) so you can paste it elsewhere - for example, onto the Invoice Cool bar</p>
Tel (H)	
Tel (W)	
Tel (M)	
Email	

You can add the current customer to a Group by clicking the Options button at the bottom left of the Customer form and then clicking "Add to Group" in the popup menu. The Group Search form is displayed so you can choose which Group to add the customer to.

7.2.12 Adding Dive Details

The Dive Details section of the Customers Module allows you to enter dive profiles and/or incidents relating to the specific customer.



You can double-click on any dive to view the specific details about the dive profile and to make any additions or changes required.

Date/Time In	The dive profile information for each dive entered related to the specific customer will be displayed.
Date/Time Out	
Air In	
Air out	
Max Depth	
Notes	
Employee	The Employee who captured the dive profile information will be displayed.

New Dive Profile

Use the **New Dive Profile** button to capture information about a specific dive.

Employee	Enter the Employee who captured the information about the dive. This will
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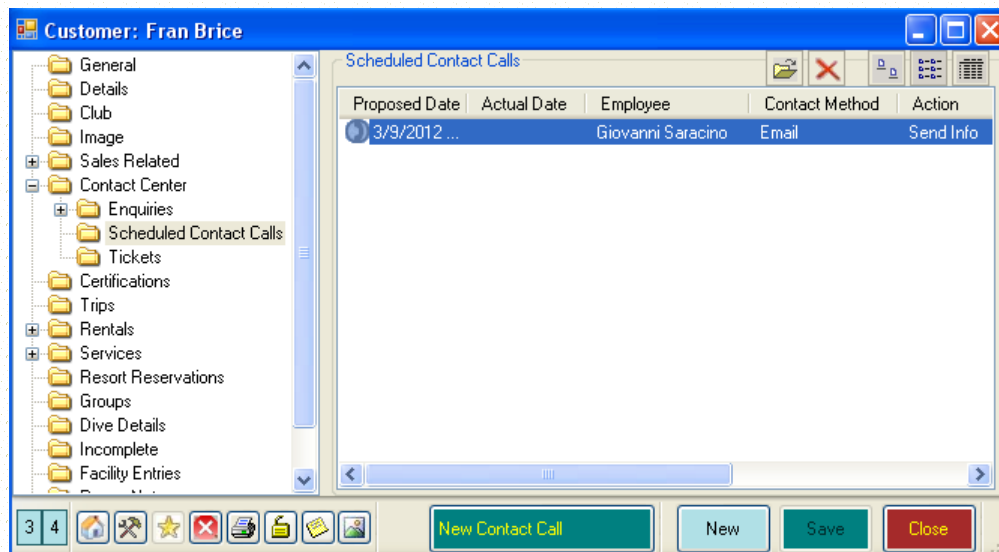
	default to the logged on employee if you checked the <i>Default Employee on New Records checkbox</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options).
Customer	The Customer you selected is defaulted. You can choose a new customer from the Customer Search box.
Dive Site	Pick the Dive Site from the list of Destinations you have setup.
Date	Enter the specific details for this customer about the dive. This information can be used for quality assurance and/or liability management or to assist your customer's with logging their dives.
Time In	
Air In	
Well as Start	
Duration	
Time Out	
Air Out	
Well at End	
Max Depth	
Computer	
Notes	

7.2.13 Scheduling Contact Calls

EVE offers a powerful feature to help you connect with your customers. You can schedule contact calls or emails that will be made to customers. For example, a call could be scheduled to follow up on a continuing education interest expressed by the client. The proposed date/time, actual date/time and employee responsible can be logged.

Scheduled Contact Calls

Details of scheduled customer contacts will be displayed.



You can double-click on any contact to view the specific details about the contact and to make any additions or changes required.

Proposed Date	The originally planned date of the contact will be displayed.
Actual Date	The Actual Date of the contact is displayed. You can use these dates to monitor employee effectiveness in contacting customers.
Employee	The Employee responsible for the contact is displayed.
Contact Method	The Method to be used (i.e. Phone, email, mail) is displayed.
Action	Any follow up Action as a result of the contact is displayed.
Notes	Any Notes regarding the contact are displayed.
Related Interest	If this contact was initiated because of a customer enquiry, the Related enquiry ID is displayed.

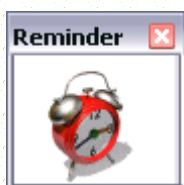
New Contact Call

You can create a new contact by clicking on the **New Contact Call** button.

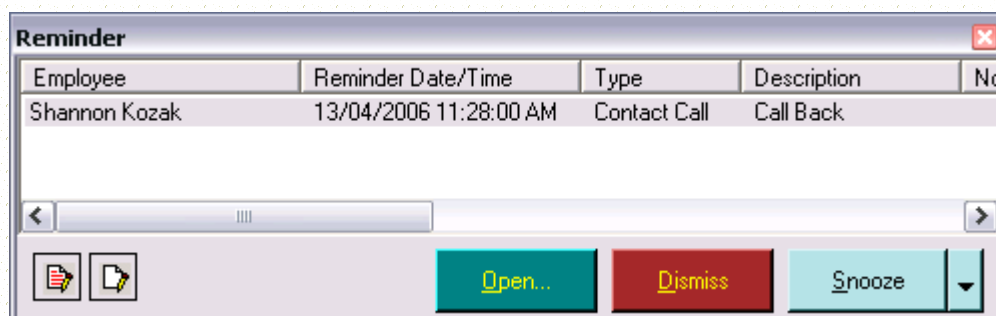
Employee	Enter the name of the Employee responsible for the contact call. The name of the logged on employee will default.
Customer	Enter the name of the Customer to contact. The name of the customer previously selected will default.
Action	Enter the Follow Up Action to be taken from the pop up list box.
Contact Method	Enter the Contact Method to be used for the customer contact.
Notes	Enter any Notes related to the contact. This could include the response to the enquiry that the customer made earlier.
Proposed Date	Enter the Date and Time that the call should be made.
Proposed Time	
Actual Date	Enter the Date and Time that the call is actually made. This indicates the

Actual Time	employee has completed the contact.
Reminder Date	Enter the Date and Time to send a reminder for the employee. You set a period for EVE 5 to <i>Check for Reminders</i> when Setting EVE Options (See Section 4.3.1.EVE Options).
Reminder Time	
PCs where Reminder should be Shown	Select the PC Where the Reminder Should be Shown. If the employee works at multiple locations or if you have multiple PCs at your location, you may choose to Add All. Otherwise you can click the Add button and Remove buttons to select one or more PCs. For example, you may not want reminders to pop up on the main Point of Sale PC in case this interrupts invoice creation.
Related Enquiry ID	This field indicates the link to the Original Enquiry. If you click the Open File button , the original Enquiry will open.

EVE will check for reminders on a periodic basis. When the reminder time comes up, you will get an alarm clock sound - if you *Enabled Sounds* when Setting EVE Options (See Section 4.3.1.EVE Options) and a visual reminder at the PCs you selected earlier.



When you click on the **Reminder screen**, a list of all Reminders is displayed. If you do not click on the **Reminder screen** - the alarm will sound again every minute.



Employee	The Employee responsible for the contact is displayed.
Reminder Date/Time	The Date and Time of the reminder is displayed.
Type	The Type of contact to be made is displayed.
Description	The follow up action required is displayed.
Notes	Any Notes associated with the contact are displayed.

You can click the **Snooze button** to have the Reminder pop up again at a later time. Use the **Dismiss button** to close the reminder permanently.

If you Double-click on the reminder the Contact Call screen will open. You can use the Related Enquiry ID to open the original enquiry and track the follow up results on the general screen. You can view all Follow-Ups to a customer on the Follow-Ups tab.

7.2.14 Adding Popup Notes

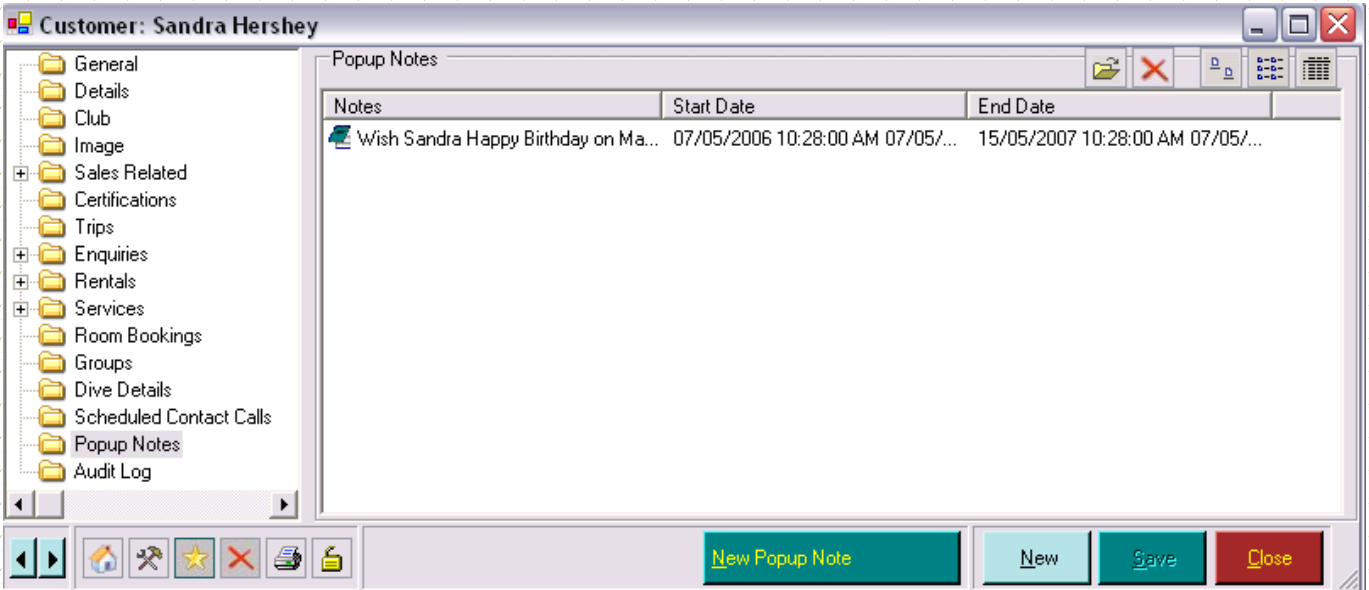
Pop-up notes are a powerful mechanism to allow you to remind employees to give specific customers specific messages. For example, you could use a pop up note to enter a customer's birth date and have the note display

each time the customer is brought up on a new invoice, rental booking, service booking, etc. for one month prior to his or her birthday. Alternatively, if a customer left behind their wallet last time they were in the store you could add a note that will popup to remind you next time they are in.

When you sell a multi-sale item, a pop up note is automatically added so that each time you create an invoice for that customer, you are reminded that the customer has a multi-sale item outstanding.

Pop up Notes

A list of pop up notes for a specific customer is displayed.

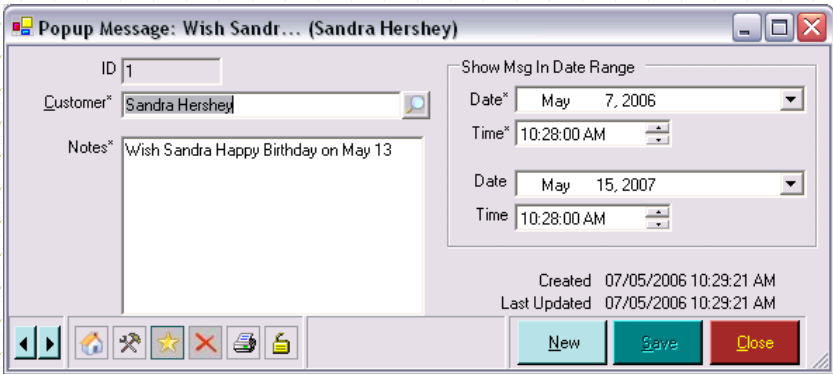


You can double-click on any contact to view the specific details about the contact and to make any additions or changes required.

Notes	The Note content is displayed.
Start Date	The Dates you want the pop-up note to be displayed from and to are displayed.
End Date	

New Popup Note

Click the **New Popup Note** button to create new pop up notes.



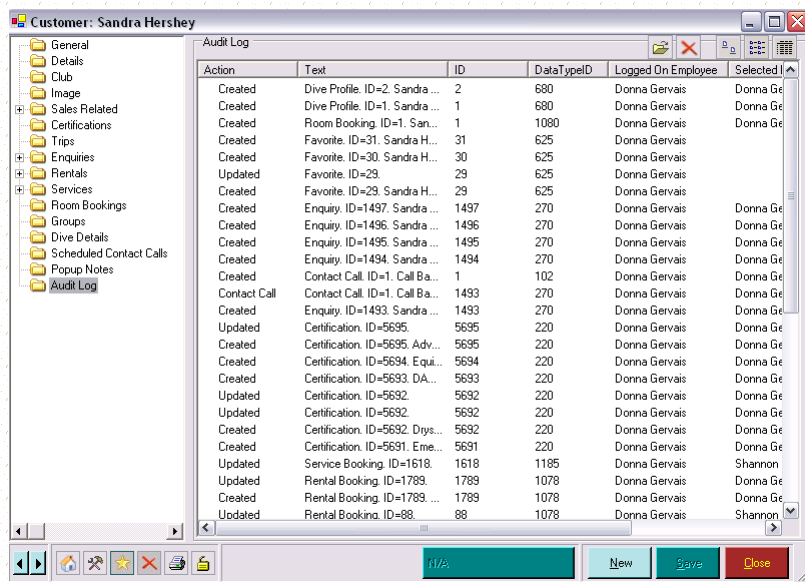
Enter the information you wish to remind employees of in the pop up form.

Customer	The Customer you have selected is displayed. You can select a new customer from the Customer Search box.
----------	--

Notes	Enter the specific pop up Note you wish to be displayed. For example, 'Happy Birthday on March 29' or 'Remind Derek about this summer's Wreck Diving trip'
Date	Enter the start Date and Time along with the end date and time for this specific message. Each time you access the customer file (in any module) during the date range, the pop up note will be displayed.
Time	
Date	
Time	

7.2.15 Reviewing Audit Log

EVE maintains an audit log so privileged users can review activity in EVE. This can be useful when tracking data changes if unexpected results are found - for instance, if an invoice was deleted, you can use the Audit Log to see when it happened and which Employee was logged on at the time.



Action	Indicates the type of activity that occurred - for example, record Created, Deleted, etc
Text	Gives a description of the audit log entry
ID	Identifies the record that was updated/deleted/etc
DataTypeID	Identifies the type of record - for example, Invoice, Customer, Purchase Order, etc
Logged On Employee	Identifies the user that was logged on when the change was made
Selected Employee	In some cases, the employee specified on a record may be different from the one that is logged on - for example, on an Invoice a different Employee may have been chosen. This indicates the name of the Employee on the record if applicable.
Date	The date the audit log entry was created.

7.3 Duplicate Customers

You may find that during day-to-day data input the same customer and/or employee is entered onto EVE more than once by mistake.

Customer Search Box

Highlight the customers you wish to merge in the Customer Search Grid. Right mouse click on the grid and select Merge Customers.

Customer Search

General | Dates

First Name: [A*] Last Name: [A*] Address Line 1: [A*] Zip: [A*] Search

Tel (Home): [A*] Customer ID: [A*] Clear

Tel (Work): [A*] Club M/ship #: [A*] New

Tel (Mobile): [A*] Drivers Lic. #: [A*] Open

Email: [A*] Group Name: [A*] Close

First Name	Last Name	Address Line 1	Tel (Home)	Email	ID	Credit	Sex	Date of Birth	Commissionabl...
C	Williams				5702	\$0.00			Y
K	Williams				5306	\$0.00			Y
m	Williams				5530	\$0.00			Y
b	Williams				5529	\$0.00			Y
Kris	Willcock		604-765-5747	kerina66@hotmail...	5081	\$0.00			Y
Bud	Williams	1461 168th Street	5317724		535	\$0.00	M...	11/04/1955	Y
Buddy	Williams	1461 168th Street	5317724		60	\$0.00	M...	14/06/1983	Y
Cathy	Williams	207 146 East 15th Ave	604 630 9357	c_g_williams@h...	5254	-\$299...	F...		Y
Elaine	New				5615	\$0.00			Y
Jeff	Open...				5411	\$0.00			Y
Kevin	Export...				234	\$0.00	M...	14/03/1974	Y
Martin	Update Multiple Rows...				902	\$0.00	M...		Y
Mike	Print Selected Item(s)...				2600	\$0.00	M...	09/02/1951	Y
Paul	Print Results Grid...				722	\$0.00	M...		Y
Ron	Select All				2165	\$0.00			Y
Steve	Deselect All				4701	\$0.00			Y
Trevor	Copy				4190	\$0.00			Y
Doug	Customize Columns...				4178	\$0.00	M...	03/08/1968	Y
Jason	Delete				2945	\$0.00			Y
Kent	Add Popup Message...				3263	\$0.00	M...	15/03/1941	Y
Lori	Email				4389	\$0.00	F...		Y
Tikeena	Merge Customers...				4521	\$0.00	F...		Y
Jolene					4870	\$0.00			Y
Liam					4884	\$0.00			Y
Jim					4769	\$0.00			Y
Murray					3299	\$0.00	M...	06/09/1944	Y

Found: 26 Do Not Show Unavailable

Merge Customer

The merge customer form will be shown. Select the Master Record and choose merge. All customer details will be merged into the Master including all invoices, rental bookings, service bookings, etc. This process cannot be undone, so proceed carefully.

Merge Customers

This process will merge the data of 2 or more Customers into one. Use this if the same person has mistakenly been entered on to the database more than once.


Before proceeding, please ensure you are the only person running EVE.

Please select the 'Master' record.

ID	Customer
5254	Cathy Williams
5702	C Williams

Merge Close

7.4 Customer Emails

There are a number of ways to email a customer. To email a single customer, find the customer in the Customers Module and click on the  icon next to the customer's email in the General section. A new message will be initiated in your computer's default email client.

Alternatively, you can use the Email form to generate an email to one or more customers wherever a list of customers is shown, including the Customer Search form, the Customers page of the Course and Trips forms, the Groups form and, most importantly, the Customer Search Wizard (See Section 18.4.1.Customer Search Wizard). Find the customer(s) you want to email, select them and right mouse click. Click **Email** and the Email form will open.

7.4.1 Email



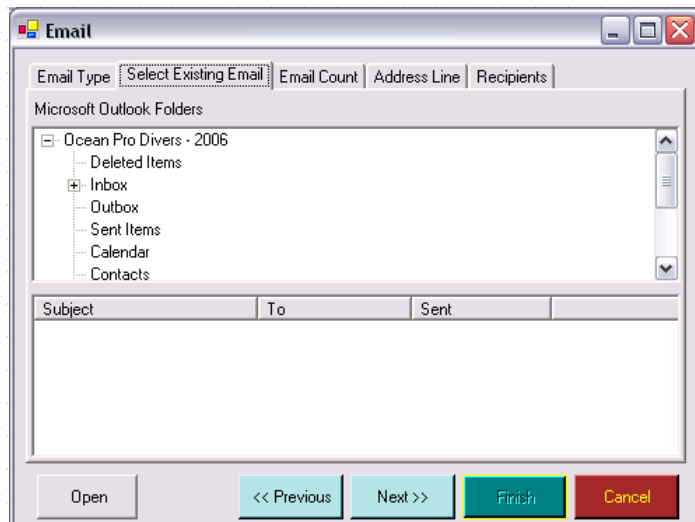
The 'Email Wizard' dialog box is shown. It has a title bar with 'Email' and standard window controls. Below the title bar are three tabs: 'Email Type', 'Address Line', and 'Recipients'. The 'Email Type' tab is active. On the left, there is a graphic with a clock, numbers, and an open book, with the text 'Email Wizard' below it. On the right, the text asks: 'Do you want to create a new email or re-use one you previously saved?'. Below this text is a group box labeled 'New / Existing' containing two radio buttons: 'New Email' (which is selected) and 'Existing Email (Microsoft Outlook Only)'. At the bottom are four buttons: '<< Previous' (disabled), 'Next >>' (disabled), 'Finish' (highlighted in green), and 'Cancel' (highlighted in red).

Select New Email if you want to compose a new email to the selected customers.

Select Existing Email if you want to send an email you prepared earlier and saved into Microsoft Outlook. For instance, you could pre-prepare a 'Congratulations' email and then re-use it each time a course completes inviting customers to a con-ed course. Alternatively, you could pre-prepare your monthly newsletter and then use the Customer Search Wizard to find all those customers on the mailing list that have an email address, etc.

In the following discussion, all tabs are applicable if you are sending an existing email, but only the Email Type, Address Line and Recipients tabs are applicable if you are creating a new email.

Existing Email

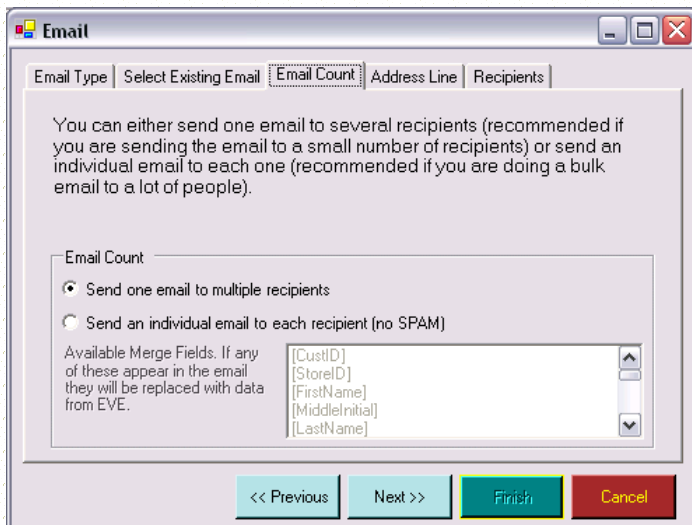


The 'Email Wizard' dialog box is shown with the 'Select Existing Email' tab selected. The 'Email Type' tab is also visible. Below the tabs is a list box titled 'Microsoft Outlook Folders' containing a tree view of folders: 'Ocean Pro Divers - 2006', 'Deleted Items', 'Inbox', 'Outbox', 'Sent Items', 'Calendar', and 'Contacts'. Below the list box is a table with three columns: 'Subject', 'To', and 'Sent'. The table is currently empty. At the bottom are four buttons: 'Open' (highlighted in green), '<< Previous' (disabled), 'Next >>' (disabled), and 'Finish' (highlighted in green) and 'Cancel' (highlighted in red).

For an existing email, you will need to identify where the existing email is held. Find your draft message in the hierarchy shown which lists all folders that you have set up in Microsoft Outlook.

Click the **Open button** to open your message and review the content if required.

Email Count

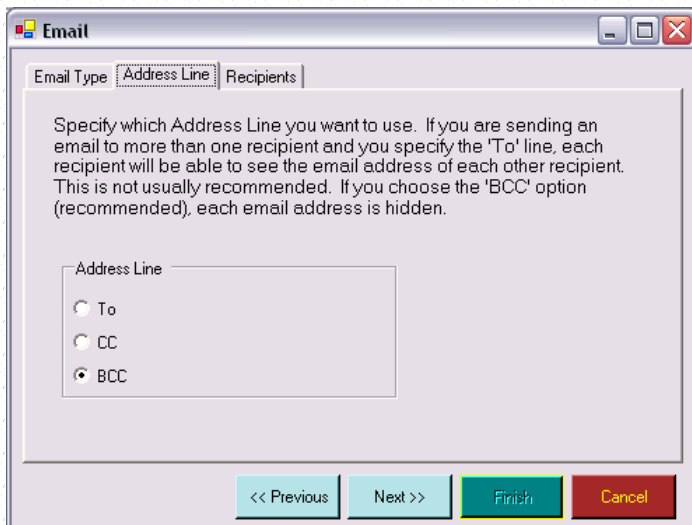


You can choose to Send one email to multiple recipients - i.e. the To, CC or BCC address line on the email will contain a list of the recipients.

More commonly, you will probably choose to send an individual email to each recipient. In this case the same email is sent once to each recipient. This reduces the likelihood of your email being tagged as SPAM and also makes your email appear customized and personally directed. To customize your email even further, you can include Merge Fields in your email content. These Merge Fields will be populated with the appropriate information from EVE for the selected customer(s). Merge Fields must be included in your email in exactly the format shown (i.e. [FirstName] not [firstname] or [first name]). If you enter the [FirstName] text in your email, (for example, you enter "Hi [FirstName]") and then send the email to 2 people called John Smith and Mary Jones, EVE will replace the merge field text with the customer names - for example, Dear John and Dear Mary respectively.

A list of applicable Merge Fields is shown in the list on the Email Count page.

Address Line

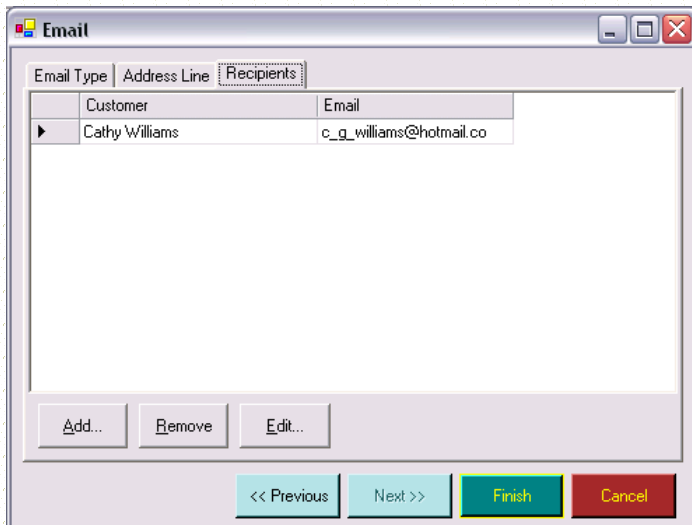


Address Line is only available when you are sending a New Email (from Email Type tab) or if you choose to Send one email to multiple recipients (from Address Line tab).

You can choose to add email addresses in the 'To' list (in which case each recipient will be able to see who else received the email), the 'CC' list (in which case all recipients will be copied on the email and will still be able to see who else received the email) or the 'BCC' list (in which case the recipients cannot see who else received the email). BCC is recommended so you do not distribute email addresses to all recipients without the consent of each recipient.

This option should only be used to email a small number of people at a time.

Recipients



The customer(s) you selected when initiating this email are displayed. You can click the **Add** button to add additional customers. Highlight a customer and click the **Remove** button to remove a customer from this email distribution. If you need to edit a customer, click the **Edit** button to access their customer file.

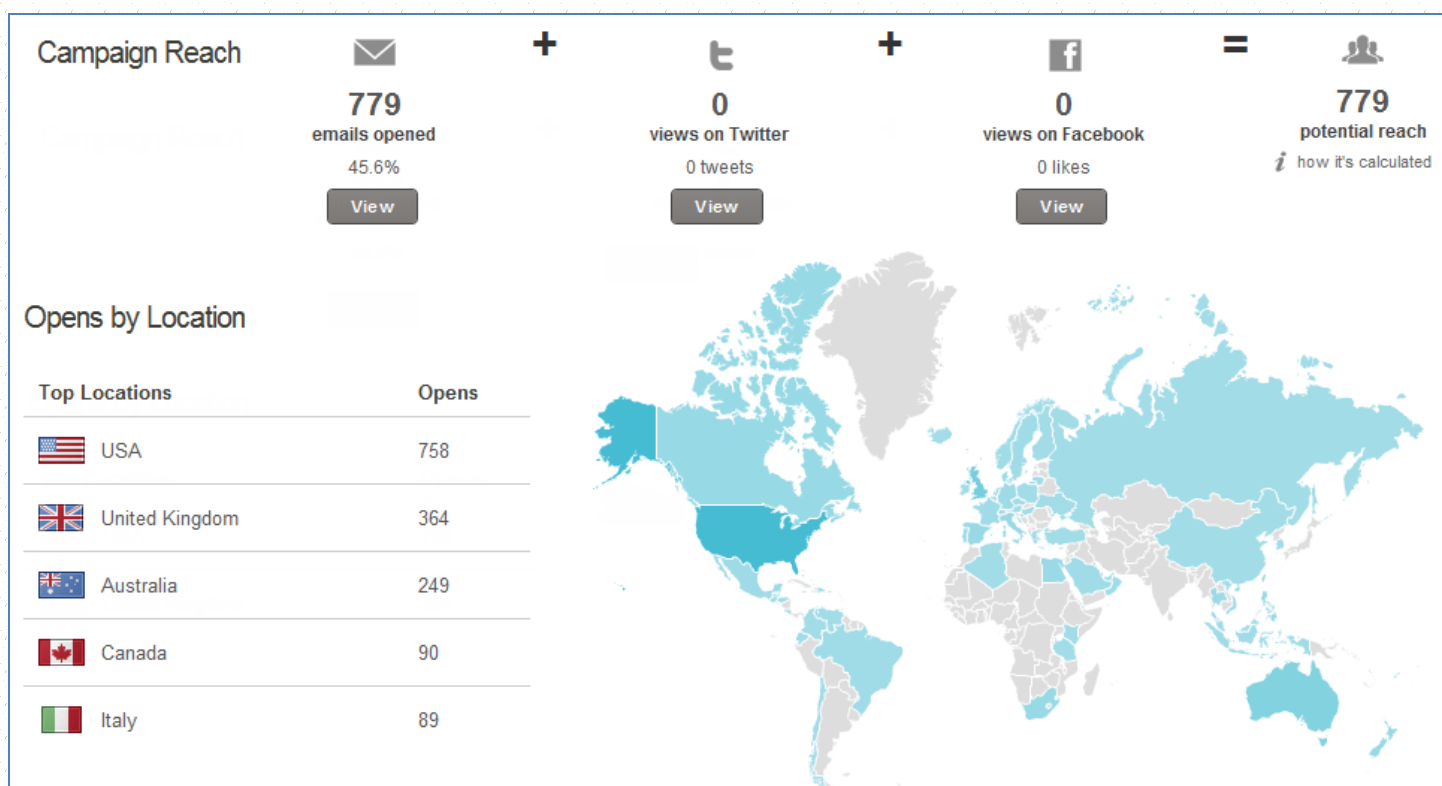
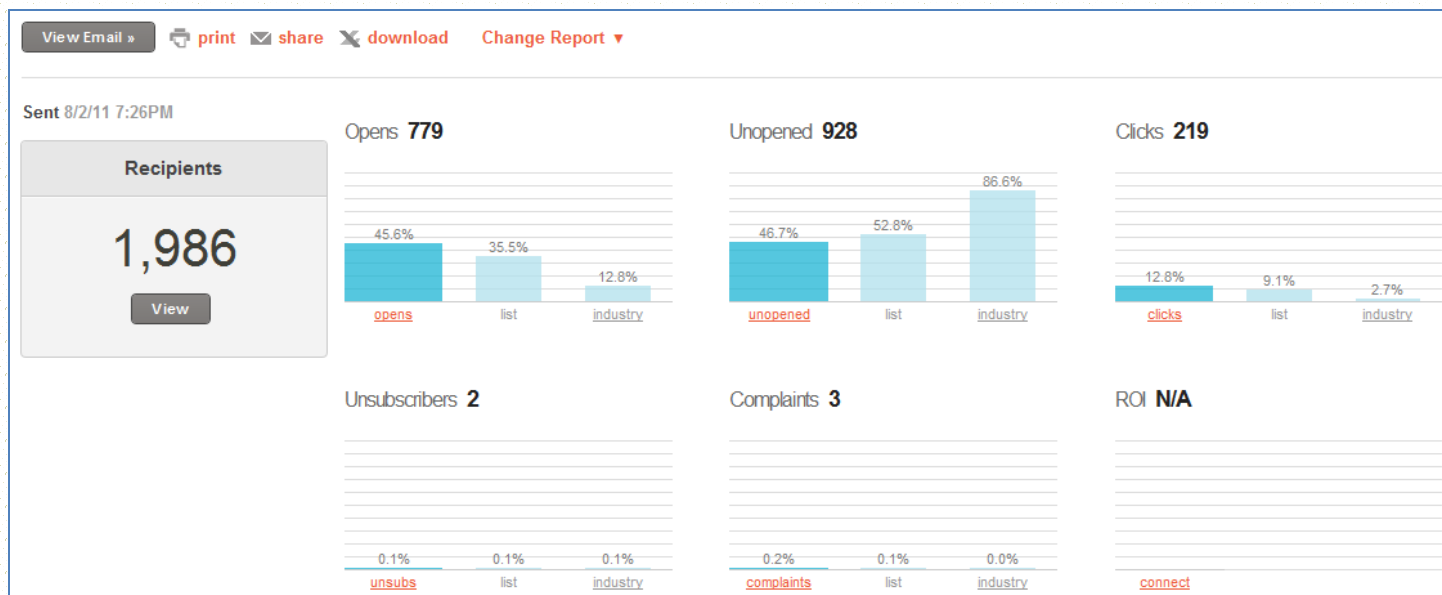
If you are creating a New email, when you click the **Finish** button, an email will be opened up with the customer(s) addresses you identified. Type in the subject line and body content as you normally would.

If you are using an existing email as a template, when you click the **Finish** button, the email(s), will be sent directly to your Outlook Outbox.

7.4.2 MailChimp

Another powerful way to email customers is using EVE's integration with MailChimp (www.mailchimp.com). MailChimp has a number of features that make it an ideal partner for EVE for the sending of marketing emails, e-Newsletters and other emails. MailChimp helps you design email newsletters, share them on social networks and track the results. It's like your own personal publishing platform.

MailChimp is a service that lets you create one or more lists of people to which you want to send emails. Each list will hold the customer's name and email address and other information that you choose. It then lets you create multiple 'Campaigns' (emails) based on those lists. When you send a Campaign from EVE, EVE will export the list of customers that you found by performing a customer search and add them to the MailChimp list. MailChimp will then track all activity associated with the Campaign once it's sent. For instance, you can view who it was sent to, who opened it, who didn't open it, who clicked on which links in the email, who unsubscribed, which email clients were used to open the email, where in the world customers were when they opened the email, etc.



To send emails using MailChimp, first perform a search using either the Customer Search form or the Customer Search Wizard. On the results page, select those customers you want to email, right click on the selected area and click Export.

On the 'Export Type' tab of the Export form, choose the MailChimp option and click Next.

On the 'Data' tab you'll be presented with a list of columns that can be exported. Each exported column contains data that can be used as "Merge Fields" in the email. E.g. if you include FirstName, you can put some text such as "Hi [FirstName]" in your email and MailChimp will substitute [FirstName] with the customer name. Be careful to choose as few columns as possible - in most cases you should include only CustID, FirstName, LastName and Email. You will typically only have a single, or small number, of MailChimp lists. Each time you perform an export and include a column that has not previously been exported, that column will be added to the MailChimp list. MailChimp allows only a finite number of columns on each list (30 at time of writing), so

eventually if you're not careful, the column limit will be reached. At that point you'll need to either delete redundant columns or create a new list.

Click Next. At this point EVE will communicate with your MailChimp account. If this is the first time you have exported to MailChimp, EVE will prompt you for an "API Key". You can generate the key by creating an account at www.mailchimp.com and then clicking "API Keys and Authorized Apps" on the Account menu. Click the "Add a Key" button to generate the key. You can copy and paste that into the prompt in EVE. The key uniquely identifies your MailChimp account so EVE knows which account to communicate with.

Once the key has been entered, EVE will show the MailChimp tab where you'll see a list of all of your unsent MailChimp campaigns. MailChimp campaigns can only be sent once so EVE only shows the unsent ones. You can choose a Campaign and then click "Send Customers to MailChimp". EVE knows which list the selected Campaign is based on so it adds your selected customers to that list. Any columns that exist in the data being exported but do not exist on the MailChimp list are added to the list. Once the customers have been added EVE creates a "Static Segment" in MailChimp that tells MailChimp which customers were just added. When you click "Send Campaign" in EVE, the Campaign is sent to only those people in the Static Segment - i.e. only to those that were just exported. Static Segments let you have one list in MailChimp that is reused each time you send a Campaign. Having only one list is useful for a number of reasons:

1/ MailChimp charges either by the number of emails being sent per month or by the number of customers you have registered in your account. If the same customer is on e.g. 3 lists, (s)he counts as 3 customers and therefore MailChimp may charge you more.

2/ if a customer unsubscribes, they probably want to unsubscribe from all of your marketing emails. Having only one list makes it easier to manage unsubscribers.

Note: MailChimp should be used for marketing emails rather than 'transactional' emails. See this page for more information: <https://apidocs.mailchimp.com/api/how-to/transactional-campaigns.php>

That page mentions a MailChimp add-on product called Mandrill that is one way to send transactional emails. If you need help with Mandrill, please contact Integrated Scuba Systems.

7.5 Address Labels or Mail Merges

EVE data can be exported to several formats:


- ❖ Standard ASCII text file
- ❖ Microsoft Word in the form of a Mail-Merge
- ❖ Microsoft Excel
- ❖ Email using Mail-Merge


Mail Merge allows you to create standard Word documents that can be merged with data to provide personalized Emails, letters, mailing labels, etc. You create the main template document using Microsoft Word and then download data from EVE to it. The data may provide, for example, the name and address of the recipients.

In this way you could compose a standard template email to invite customers to your next Advanced Open Water course. Using the Customer Search Wizard (See Section 18.4.1.Customer Search Wizard), you could find all those customers interested in taking the course and, using Mail Merge, let EVE turn the standard template into an email or letter addressed personally to each one. Alternatively, you could find all those customers interested in going on the next club trip and print out a letter addressed to each one. You can also use Mail Merge to print the address labels to stick on each envelope. Once a template has been created you can use it as often as you like - just export data from EVE to it.

You can create a mail merge for customers wherever a list of customers is shown, including the Customer Search form, the Customers page of the Course and Trips forms, the Groups form and, most importantly, the Customer Search Wizard (See Section 18.4.1.Customer Search Wizard). Find the customer(s) you want to email, select them and right mouse click. Click **Export** and the Export form will open. See Exporting Data for more information (See Section 18.5.Exports).

7.6 Reservation Form

The Reservation Form provides an easy way to move through the key data fields you need to capture about a new customer. Open a New or existing Customer file and press the F9 key (or click the Options button  and then 'Reservation Form') to bring up the reservation form. The form below will be displayed on the left hand side of the screen.



Each time you press the F9 key, you will be taken directly to the next required field on the reservation form. Once you have completed your data entry, save the Customer file.

You can add items to the Reservation form list as follows:

1/ open the Reservation form

2/ on the Customer form, click on a field that you want to appear in the Reservation form. You will see the name of that field shown in the box in the status bar at the bottom of the Customer form. In the graphic below, we clicked on the Last Name field on the Customer form:



3/ using your mouse, drag the box from the status bar and drop it on the Reservation form. The name will be added to the list.

To remove entries from the Reservation form, right click on them and click Delete.



7.7 Loyalty Program

If you wish, you can run a loyalty program using EVE. Under this scheme you can assign credit to favored customers based on their activities at your store/resort. For instance, customers may gain credit for the amount of goods and services they purchased last year, or for the number of trips they attended, etc.

Members of the loyalty program will receive a loyalty card and credit will be assigned to that card. Customers can use their loyalty card as payment for goods and services in the future. Loyalty programs are a good way to encourage customers to return to your store rather than visit a competitor or use the Internet for their purchases.

7.7.1 Adding a Customer to the Loyalty Program

You can choose whether all customers are part of the loyalty program or only those that are members of a particular Club or members of a particular Group. You can choose on the Customers tab of the Options form - see section 4.3.3.

If you choose the Club/Group option, you can add a customer to the loyalty program in most places where customers are displayed. For instance, on the Customer Search form, you can select one or more customers, right click on the selected area and choose the 'Add to Loyalty Program' menu. Alternatively, if a customer record is open, you can click on the Options icon at the bottom left and click 'Add to Loyalty Program'. When you do this, EVE will add the customer(s) to the Group or Club you specified on the Options form.

7.7.2 Assigning Credit to Loyalty Cards

Case 1/ If you have a tick in the "Automatically Assign Loyalty Credit when Invoice Saved" box on the Customers tab of the Options form (section 4.3.3), EVE will add credit to the customer's loyalty gift card whenever an invoice of theirs is saved provided the Invoice Type has a tick in the "Assign Loyalty Credit" box (see section 4.4.21). EVE calculates the credit by looking at each item in the shopping basket and multiplying the Price on the line by the Loyalty Percentage value defined on the stock item and dividing by 100:

$$\text{Price} * \text{Loyalty\%} / 100$$

If you want, you can show the total amount of loyalty credit owned by the customer on their printed receipt. To do that make the fields on the receipt print layout called "LoyaltyCredit" (this represents the credit earned on the current invoice) and "TotalLoyaltyCredit" (this represents the total credit earned by the customer across all invoices) visible.

Case 2/ If however, you do not have a tick in the "Automatically Assign Loyalty Credit when Invoice Saved" box on the Customers tab of the Options form (section 4.3.3), EVE will only add credit to the customer's loyalty gift card when you specifically tell it to do so. You can assign credit to loyalty cards whenever you want, but you may want to do it on a regular basis - e.g. at the end of the week, or month, etc.

To assign credit, first change the User Interface to Administrator by clicking on the UI button on the toolbar on the main EVE form. Then, expand the Customer section by clicking on the + sign next to Customer in the hierarchy on the left. Then, expand the Loyalty Program entry. You will see 3 entries called 'Total Spending in Period', 'Course Count in Period' and 'Trip Count in Period'. When you click on one of these, EVE will show a Specify Date Range form so you can choose which dates to search between for customer activity that deserves credit. When you click OK, EVE will display a list of those loyalty program members that have accrued credit in the period. For instance, if you used the Total Spending in Period option, all those members that have spent money in the period will be listed along with the Net and Gross spent. In addition, a Loyalty Credit column will be shown that indicates how much credit is due based on their spending. By default, \$1 will be due for each \$100 spent. If you want to change this ratio, please contact EVE Diving.

Next, select those customers to whom you want to assign credit (press Ctrl A to select all of them), right click on the selected area and choose the 'Add Loyalty Credit' menu. EVE will add the credit amount from the Loyalty Credit column to each customer's loyalty card. A loyalty card is a special type of Gift Card. I.e. it is a Gift Card with a Type of 'Loyalty Program' rather than 'Standard'. If the customer does not currently own a loyalty card, EVE will automatically create one as part of this process.

7.7.3 Loyalty Program Options

In case 2/ above, when assigning credit to each loyalty card EVE, behind the scenes, creates an invoice for each customer. The invoice has a special invoice type of 'Loyalty Program' and has 2 line items on it. The first assigns credit to the card and the second keeps track of the loss your store is making by giving the bonus credit to the customer. The two line items cancel each other out so no balance is due - i.e. if a credit of \$100 is being applied, the first line item has a positive value of \$100 and the second line item has a negative value of \$100.

You can choose which actual stock items are used for these tasks on the Customer page of the Options form - see section 4.3.3 Customers Options. You are advised to use stock items whose stock types are in different Profit Centers - for instance, the first stock item could be called 'Loyalty Card' and its stock type could be in the 'Gift Certificates' Profit Center. The second stock item could be called 'Loyalty Account' and its stock type could be in the 'Loyalty Program' Profit Center. In this way, your Profit Center Breakdown report will make it obvious how the credit has been assigned.

8 PURCHASE ORDERS

The Purchases Module is used to monitor and maintain stock levels. Top-up orders can be easily produced and printed or e-mailed to the supplier. In this way you need never be out of stock of the faster moving items or over stocked with items temporarily less popular. Using EVE's powerful search engine you can view Suppliers orders and list the items that sold in selected time periods. This allows you to keep track of company spending and negotiate discounts on high volume items.

Typically your Purchase Orders will follow a three-step process.

Purchasing	You identify the need to order inventory and create a Purchase Order. At this point, store stock requirements are reviewed and stock items are added to the Purchase Order. The Purchase Order will be assigned a status of Unsent until you are satisfied that all goods have been added, at which point you will send the invoice to the Supplier and change the status of the Purchase Order to Sent.
Deliveries / Backorders	Goods are received from the Supplier and you accept Delivery of the goods against the Purchase Order. If you only receive a partial delivery, you will set the Purchase Order status to Awaiting Backorders. If you receive all goods on the Purchase Order, you will set the Purchase Order status to All Received.
Invoicing	Invoices are received for the goods that were delivered earlier. You match the invoices against the Purchase Order and when all invoices for a Purchase Order have been received, you will set the Purchase Order status to Complete.

8.1 Purchasing

Select the Purchases Module from the Hierarchy and click New Purchase Order. You can tab through the fields on the form or use the Cool Bar at the right of the form to speed your data entry.

General

311

General Details Deliveries Supplier Invoices

PO # (New #1)

Cost Center Scubaland Adventures, Inc.

Employee* Chris Brame

Supplier* OCEANIC

Ship to Store* North Store

Status* Unsent

Dates

Created

Sent

Completed

Last Updated

Barcode # A Store Stock # A Manuf. Stock # A

	Qty Ordered	Qty Outstanding	No. In Stock	Stock #	Manufacturer's Stock #	Unit Price	Price	Tax	Total	Stock Item
1	1	0	009	009		\$0.25	\$0.25	\$0.00	\$0.25	009 O-RING
2	2	28	05.4400.27	05.4400.27		\$26.00	\$52.00	\$0.00	\$52.00	ACCENT MASK, BLACK/BLACK,
1	1	0	08.7030.14	08.7030.14		\$99.98	\$99.98	\$0.00	\$99.98	AIR XS COMPLETE, 14"
5	5	0	08.7030.20	08.7030.20		\$99.98	\$499.90	\$0.00	\$499.90	AIR XS COMPLETE, 20"
1	1	0	06.4012.07	06.4012.07		\$45.00	\$45.00	\$0.00	\$45.00	ARC 220 LIGHT BLUE
6	6	0	04.2250.79	04.2250.79		\$130.00	\$780.00	\$0.00	\$780.00	B.U.D. (BACK UP DEVICE) BLUE
9	9	0	04.6180.31	04.6180.31		\$36.00	\$324.00	\$0.00	\$324.00	BATTERY 25 PACK, CR2032
1	1	0	04.6180.41	04.6180.41		\$60.00	\$60.00	\$0.00	\$60.00	BATTERY 25 PACK, CR2450

Row Count 8 Qty Count 26 Sub-Total \$1,861.13 Tax \$0.00 Total \$1,861.13

New Save Close

Employee Supplier Store Stock Items Search Re-Stock Top-Up Special Orders PO Status

Purchase Order#	The Purchase Order Number is generated by EVE. It will display as (new #XX) where XX is the number of Purchase Orders created in this session of EVE until you save the Purchase Order at which point EVE will assign a permanent Purchase Order number.
Cost Center	You do not usually need to do anything with the Cost Center field. EVE will assign it based on the items you add to the Purchase Order. However, if an item is appropriate at more than one Cost Center, EVE will ask you which one you want to use. All items added to the Purchase Order must be valid at the same Cost Center. Most locations will only have one Cost Center anyway in which case you will not need to do anything with this field.
Employee	<p>If you selected <i>Default Employee on New Records</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted and you will need to choose one.</p> <p>Choose the employee creating this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Supplier	When creating a new Purchase Order, you will need to select the Supplier. EVE distinguishes between Manufacturers and Suppliers. You may purchase some items directly from the manufacturer, in which case the manufacturer and the supplier for those Stock Items are the same. However, if you purchase some items from a distributor then the manufacturer and the supplier

	<p>(distributor) for those Stock Items are different.</p> <p>When the Supplier is chosen, only Stock Items that can be purchased from that Supplier are listed in the Stock Items. The supplier for each item is identified on the Suppliers tab of the Stock Item form (See Section 5.1.5.Stock Items).</p>
Ship to Store	If you have multiple stores, you will select the store you wish the goods to be delivered to here.
Status	<p>Choose the Status of the Purchase Order. A new Purchase Order will have the default status of Unsent. When you are happy with the details of the Purchase Order, you can change the status to Sent. Purchase Orders must have the status of Sent in order to have deliveries received.</p> <p>Once you have begun to receive goods, you can change the status to Awaiting Backorders or All Received.</p> <p>Once all goods have been received and invoices are matched to the deliveries, you can change the status to Complete.</p>
Created Date	When this Purchase Order is saved, EVE will enter a time stamp into this field.
Sent Date	When you change the status of the Purchase Order to Saved, EVE will enter a time stamp into this field.
Completed Date	When you change the status of the Purchase Order to Complete, EVE will enter a time stamp into this field.
Last Updated Date	Each time you make a change to the Purchase Order (i.e. change the status, add or remove stock items, accept delivery of goods, add an invoice), the Last Updated Date field is updated.

8.1.1 Adding Items to a Purchase Order

Stock Items

Use the Barcode, Manufacturer Stock # or Store Stock # to add items to the Purchase Order.

Barcode #	<p>The Barcode # field is used in conjunction with a barcode reader to quickly add Stock Items to the Purchase Order.</p> <p>Only barcode readers that simulate key strokes when a barcode is swiped are supported.</p> <p>To select stock items within EVE, position the cursor into the Barcode # field (by pressing F9 or by holding down the CTRL key while pressing B or by left clicking in the field) and swipe the barcode. EVE searches for the matching Stock Item and adds it to the Purchase Order.</p> <p>Note: when the barcode is swiped, data is written to whichever field is active. Make the barcode # field active before swiping the barcode to allow the functionality described above to be successful. Most barcode readers can be programmed to send additional characters before and/or after the barcode data. Programming your reader to send an F9 key before the barcode data will automatically set focus to the barcode # field immediately prior to the barcode data being sent.</p> <p>Note: you can use the barcode # field without a barcode reader. Type the barcode number (this is usually displayed beneath the barcode on the label) directly into the barcode # field and press the Enter key.</p>
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Store Stock #	If you know the Store Stock Number (SKU) or Manufacturer Stock Number of the item, type it into the appropriate Stock # field and press the Enter key. EVE searches for the matching Stock Item and adds it to the Purchase Order.
Manuf. Stock #	

Searching for Stock Items

If you do not know the exact Barcode or Stock Number, use the Stock Search function to find the required items. The Search box is displayed

Stock Item Search

General | Dates | Retail Price | ☒ Only show items that can be added to POs?

Stock Type: Sub Stock Type:

Manufacturer: Supplier: **A. P. Valves**

Description: Store Stock #:

Barcode #: Manuf. Stock #:

Primary Color: Secondary Clr:

Size: ID:

Search **Clear** **New** **Open** **Add** **Close**

Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price
_d1	_d1	Accessories	A. P. Valves	7697	\$274.90
25kg Liftbag With Dump	LB25DV	Lift Bags	A. P. Valves	2965	\$6.05
a	a	Accessories	A. P. Valves	7616	\$10.00
a"	a"	Accessories	A. P. Valves	7202	\$13.31
a55	a55	Accessories	A. P. Valves	7617	
a56 ccc	a56	Accessories	A. P. Valves	7618	
abcdef	abcdef	Accessories	A. P. Valves	7661	\$100.00
Ap18 Mouthpiece	AP18	Service Kits	A. P. Valves	2554	\$16.94
Ap200 Full Service Kit	AP200	Service Kits	A. P. Valves	2553	\$16.94
AP66 Comfort Pad	AP66	BCDs	A. P. Valves	2106	\$217.80
asdfsadfsadf	asdfsadfsadf	Masks	A. P. Valves	7189	\$36.30
aSFD44455	ASDF	Accessories	A. P. Valves	7200	\$1.21
Auto Air Full Service Kit	AP100/A	Service Kits	A. P. Valves	2550	\$16.94
Auto Air Main Diaphragm	AP100/5	Service Kits	A. P. Valves	2551	\$16.94
Auto Air Mouthpiece	AP100/4	Service Kits	A. P. Valves	2552	\$16.94
h"	h"	Accessories	A. P. Valves	7203	\$13.31

Found: 29 [Do Not Show Unavailable](#)

If you use the search function, you can use EVE's field matching capabilities. Use the matching option beside the field to set the match criteria:

- ❖ A* - Match start of field
- ❖ *A - Match end of field
- ❖ A - Match any part of field
- ❖ A - Exact Match

Usually, you will want to search bar codes based on an exact match (A), while stock numbers may be on a partial match to the start of the field (A*)

Only those items that have been marked as 'Can be Added to Purchase Orders' on the Stock Levels tab of Stock Items (See Section 5.1.5. Stock Items) are displayed. Items are shown in red if their Number in Stock value has fallen to 0 (or below). All other items are shown in black.

Once you find the item you wish to purchase, double-click on it to add it to the Purchase Order. By default, if an item is already on the Purchase Order and you add it again, the quantity on the Purchase Order is increased. You can override that so that all entries appear on their own line by holding down the Shift key on your keyboard when you add the item.

If an item is added in error select the row (by clicking in the leftmost grey column) and press the Delete key on your keyboard.

Top-Up

Click this button to add those Stock Items to a Purchase Order whose number in stock is below the Ideal Level as defined in Stock Items (See Section 5.1.5.Stock Items). As the name suggests, this performs a top-up order by ordering sufficient supplies to take you up to the ideal level for each item (i.e. the number of units ordered is # in stock subtracted from the ideal #).

Restock

Click the **Restock** button to replace those Stock Items which have been sold within a date range.

Description	Stock #	Stock Type	Manufacturer	ID
-------------	---------	------------	--------------	----

Store	The Store you previously selected is displayed. This is not editable.
Supplier	The Supplier you previously selected is displayed. This is not editable.
From Start of Date	Enter the beginning and end (inclusive) of the date range you want to restock for.
To End of Date	

Click the **Search** button to display the results of your restock search. Highlight those items in the grid that you want to add to your Purchase Order and click the **Add** button.

Special Orders

If a customer has an item on Special Order, as described in Selling a Stock Item (See Section 5.1.5.Stock Items), the **Special Order** button on the Cool bar will be highlighted with red print. Click on it to add the outstanding Special Order items.

Customer	Qty	Stock Item	Store Stock #
GIRARD HAGAN	1	Tubular Valve Micron	T55

Use the **Add** button to add items to the Stock Item grid. These items will be marked with a Special Order Number on the Purchase Order so you can identify them later when the delivery is made.

Stock Item Grid

The following fields will be completed when you add a Stock Item.

Qty Ordered	<p>Qty Ordered is the number of units of the stock item that you want delivered</p> <p>By default, when an item is added to the grid, the quantity shown is one. However, you can overwrite this quantity if you want to stock a different number of units. As items are added to the order grid the totals at the bottom right of the form are updated.</p> <p>If you are returning an inventory item to a vendor, enter a negative number.</p>
Qty Outstanding	<p>This indicates the number of units not yet received from the supplier. When the Purchase Order is first created this value is the same as quantity. As deliveries are made EVE will update the number for you.</p>
No. In Stock	<p>The current number of units in stock.</p>
Stock #	<p>Indicates the Store Stock Number that you have defined to uniquely identify the item. The text is not editable.</p>
Manufacturer's Stock #	<p>Indicates the Manufacturers Stock Number. This is usually the same as the Store Stock number. The text is not editable.</p>
Unit Price	<p>The purchase/cost price before tax of one unit of the Stock Item. When an item is first added to the shopping basket the Unit Price shown is the cost price at your Cost Price Level from this supplier that you defined in Stock Items. You can change the value by typing directly into the grid. Changing the value only affects the cost of the item on this Purchase Order - it does not affect the Cost Prices (i.e. the purchase price of these items in the future) of the Stock Item.</p> <p>When this item is received (delivered), it will be added to inventory at the cost you identify on the Purchase Order unless you amend the cost on the Delivery.</p>
Price	<p>The Price before tax of all units being purchased of the item. This figure is reduced if a discount is being applied. EVE calculates the price based on quantity * unit price but you can override the value by typing directly into the grid - EVE will automatically recalculate the tax.</p>
Tax	<p>The amount of Tax. EVE automatically calculates this (based on the purchase tax band of the item). The value is not editable but you can affect its value by choosing a different Tax Band in the grid if necessary.</p>
Total	<p>The sum of price and tax. EVE automatically calculates this but you can override the value by typing directly into the grid. If you change the value, EVE recalculates the price and tax accordingly.</p>
Stock Item	<p>A description of the Stock Item. This corresponds to the Purchase Order description defined on the Suppliers tab in the Stock Items (See Section 5.1.5.Stock Items).</p>
Tax Band	<p>When a Stock Item is added to an invoice, the tax band is defaulted to the Purchase Tax Band as defined in Stock Items. You can change this by picking an item from the popup list.</p>
Tax Rate	<p>This value is not editable. It indicates the rate of tax for the tax band chosen.</p>
Notes	<p>You may enter a Note that is relevant to the purchase of this specific Stock Item.</p>

Stock Type	Indicates the category of the Stock Item, for example, Wetsuit, snorkel, etc. The text is not editable.
Manufacturer	Indicates the Manufacturer of the Stock Item. The text is not editable.
Size	Indicates the Size of the Stock Item. The text is not editable.
Primary Color	Indicates the Primary Color of the Stock Item. The text is not editable.
Secondary Color	Indicates the Secondary Color of the Stock Item. The text is not editable.
Special Order #	If this item has been added to the Purchase Order in response to a Special Order from a customer, the Special Order Number is displayed. Special Orders are described below.
Last Updated	Indicates the date/time that the entry was last modified. This will usually be the time that the item was added to the Purchase Order.
Subtotal	<p>These boxes show the amount (pre-tax) and tax due on the transaction as a whole. They are not editable. The Sub-total is the sum of all prices in the Purchase Order. The Tax is the sum of all taxes in the Purchase Order. The Total is the sum of the sub-total and tax.</p> <p>If you checked the <i>Perform Rounding of Line Items checkbox</i> when Setting Purchase Options (See Section 4.3.4.Inventory Options), EVE will round the tax and total on every individual line item on Purchase Orders. For example, if the net price of an item is \$97.50 and the tax rate is 17.5% then:</p> <p>If the option is checked, \$17.06 will be written to the Tax column and \$114.56 will be written to the line item Total column.</p> <p>If the option is not checked, no rounding will take place and \$17.0625 will be written to the Tax column and \$114.5625 will be written to the Total column. (EVE will round the figures on display so it will still show \$17.06 and \$114.56 on form, but on the database it will save the additional decimal places.) Rounding does not occur when using this option until everything on the invoice has been totaled.</p> <p>If the checkbox is unchecked, EVE calculates the total invoice tax using unrounded figures and so will not over/under charge. The drawback is that using unrounded tax, it can look as if EVE miscalculates the totals, (if line item tax is shown on the printed receipt, the total tax may differ from the sum of the line items by a penny or two.)</p>
Tax	
Total	

Details

311

General Details Deliveries Supplier Invoices

Shipping Instructions free shipping min order \$1500

Payment Terms Net 30

Notes (will not appear on PO)

Barcode # A Store Stock # A Manuf. Stock # A

	Qty Ordered	Qty Outstanding	No. In Stock	Stock #	Manufacturer's Stock #	Unit Price	Price	Tax	Total	Stock
	1	1	0	009	009	\$0.25	\$0.25	\$0.00	\$0.25	009 C
	2	2	28	05.4400.27	05.4400.27	\$26.00	\$52.00	\$0.00	\$52.00	ACCI
	1	1	0	08.7030.14	08.7030.14	\$99.98	\$99.98	\$0.00	\$99.98	AIR >
	5	5	0	08.7030.20	08.7030.20	\$99.98	\$499.90	\$0.00	\$499.90	AIR >
	1	1	0	06.4012.07	06.4012.07	\$45.00	\$45.00	\$0.00	\$45.00	ARC
	6	6	0	04.2250.79	04.2250.79	\$130.00	\$780.00	\$0.00	\$780.00	B.U.C

Row Count 8 Qty Count 26 Sub-Total \$1,861.13 Tax \$0.00 Total \$1,861.13

New Save Close

Employee Supplier Store Stock Items PO Status Complete Sent Sent by B2B

Shipping Instructions

Use Shipping Instructions to enter any free-text instructions regarding shipping that you wish. The Shipping Instructions are printed onto the Purchase Order. At the top of the Shipping Instructions text box are 5 icons . You can set these to hold text that you commonly add to a transaction. You can then click on the icon to add the text to the Shipping Instructions field.

To define the text for an icon, right click on it. A prompt is shown so you can enter text up to a maximum of two hundred fifty five characters. When creating a transaction next time, click on the text icon and the previously defined text is added to the Shipping Instructions text box.

Payment Terms

Use Payment Terms to enter any free-text instructions regarding payment that you wish. The Payment Terms are printed onto the Purchase Order. At the top of the Payment Terms text box are 5 icons . You can set these to hold text that you commonly add to a transaction. You can then click on the icon to add the text to the Payment Terms field.

Notes (will not appear on Purchase Order)

You can add Notes to the Purchase Order that are for your store use only. These notes will not be displayed on the Purchase Order.

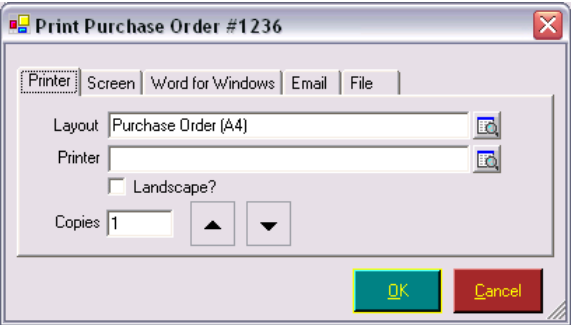
When you are happy that you have added all items to the Purchase Order, click the **Save** button to commit the order to the database.

8.1.2 Printing the Purchase Order

The print dialog is shown when the Purchase Order is saved or when you select the Print Icon from the Navigation buttons.

You can choose to send your invoice to print on a Printer, Screen, Microsoft Word, Email or File.

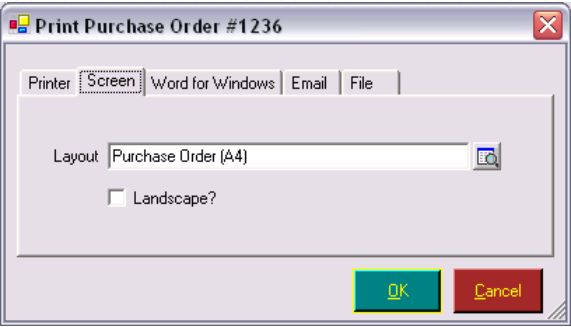
Printer



Click the **OK** button to send the transaction details to the printer shown in the pop up list box. The pop up list box holds a list of all printers installed on your computer with a standard Windows printer driver (whether they be local printers attached to the serial, parallel or USB port, or network printers attached to another PC on the network).

Layout	Select the Layout you want to use for your Purchase Order. All documents within EVE have default print layouts. You can edit the layout using the Print Layouts form (See Section 18.1.Print Layouts).
Printer	Choose the Printer to send your Purchase Order to.
Landscape	If you want the Purchase Order to print in landscape format (i.e. wider than it is tall), choose Landscape. Otherwise the Purchase Order will print in portrait format (taller than it is wide).
Copies	You can choose to print multiple copies by entering the number of copies to print or by using the Up button or Down button.

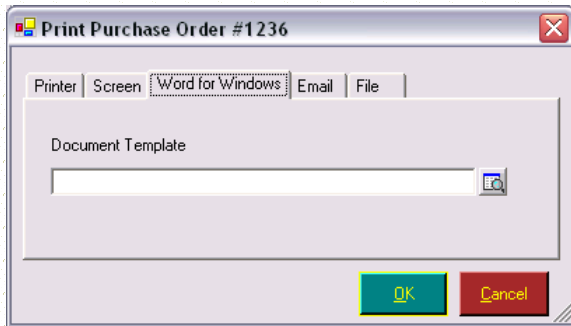
Screen



You will not typically send the print to the screen. This acts like a print preview and shows the general layout of the transaction.

Layout	Select the layout you want to use for your Purchase Order.
Landscape	If you want the Purchase Order to print in landscape format, put a check mark in the Landscape box. Otherwise the Purchase Order will print in portrait.

Microsoft Word

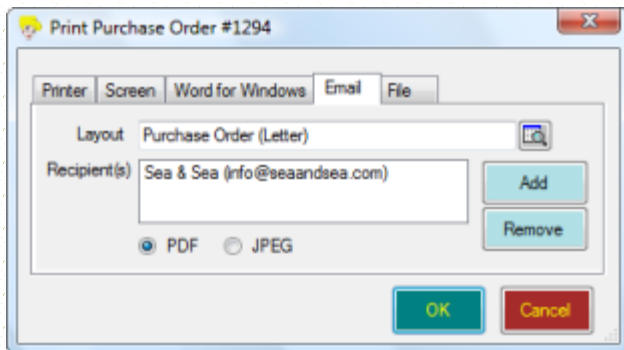


Choose this (not recommended) if you want to keep a saved version of the transaction on disk in Microsoft Word format. When you click the **OK** button, Microsoft Word is started and a document is created showing the Purchase Order details.

Document Template	Choose the Microsoft Word template to use for this report.
--------------------------	--

Email

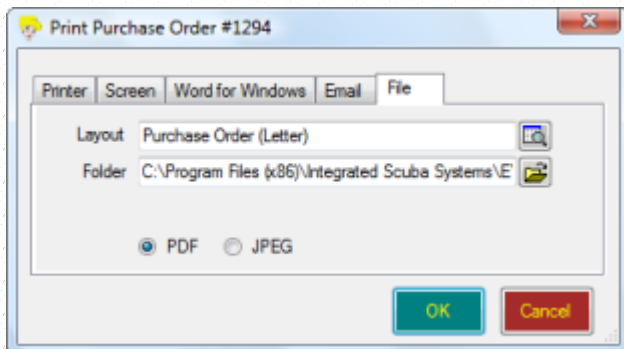
Use the Email option to send the Purchase Order by email to the supplier. The Purchase Order is automatically added as an email attachment in PDF or JPEG image format.



Recipient	Any email addresses for the selected supplier on the Purchase Order will be shown. You can click the Add button or the Remove button to change recipients.
------------------	--

File

If you simply want to save a PDF or JPEG image of the Purchase Order, choose the File tab.



Folder	You can send the document to a file folder.
---------------	---

8.1.3 Deliveries/Back Orders

Use the Deliveries tab to update your stock levels when you receive items from your supplier.

Purchase Order: #3783 (OCEANIC)

GeneralDetailsDeliveriesSupplier Invoices







Delivery #	Date/Time	Received By	Notes
4674	5/18/2014	Chris Brame	
4675	5/22/2014	John Harris	

New DeliveryOpen DeliveryDelete Delivery

Barcode #AStore Stock #AManuf. Stock #A

	Qty Ordered	Qty Outstanding	No. In Stock	Stock #	Manufacturer's	Unit Price	Price	Tax	Total
1	0	1	009	009		\$0.25	\$0.25	\$0.00	\$0.25
2	0	30	05.4400.2	05.4400.27		\$26.00	\$52.00	\$0.00	\$52.00
1	0	1	08.7030.1	08.7030.14		\$99.98	\$99.98	\$0.00	\$99.98
5	0	5	08.7030.2	08.7030.20		\$99.98	\$499.90	\$0.00	\$499.90
1	0	1	06.4012.0	06.4012.07		\$45.00	\$45.00	\$0.00	\$45.00
6	0	6	04.2250.7	04.2250.79		\$130.00	\$780.00	\$0.00	\$780.00

Row Count 8Qty Count 26Sub-Total \$1,861.13Tax \$0.00Total \$1,861.13



NewSaveClose

EmployeeSupplierStoreStock ItemsPO Status

All ReceivedAwaiting Back OrdersComplete

The Deliveries tab displays all of the information regarding previous deliveries (if any) against this Purchase Order. You can click the **Open Delivery** button to review the details of a previous delivery. If a delivery has been entered in error, highlight the delivery and select the **Delete Delivery** button.

New Delivery

Click on the **New Delivery** button to display the Purchase Order Delivery form.

PO Delivery: (New #1)

Delivery # (New #1)PO # 1213

Received By Shannon KozakPO Cost Center Ocean Pro Adventures Ltd.






Date/Time April 18, 2006

NotesCreated Last Updated

Outstanding Items

	Qty Received	Label Qty	Qty Outstanding	Qty Ordered	Cost Price	Stock Item	Stock #	M
1	0	1	1	1	\$200.00	Hawaii - Haw	HAW.	H

All ReceivedPrint LabelsSpecial Orders



NewSaveClose

Delivery #

The Delivery Number is generated by EVE. It will display as (New #XX) where XX is the number of Deliveries created in this session of EVE until you save the

	Delivery at which point EVE will assign a permanent Delivery number.
Received By	<p>If you selected <i>Default Employee on New Records</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted and you need to choose one from the pop up list.</p> <p>The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Date/Time	When this Delivery is saved, EVE will enter a time stamp into this field.
Notes	Enter any Notes associated with the Delivery.
Purchase Order#	The Purchase Order # you are matching this delivery to is displayed here.
Purchase Order Cost Center	The Cost Center associated with the related Purchase Order is displayed here.
Barcode	Swipe a barcode on one of the delivered items to quickly set focus to that line in the Delivery grid.
Qty Received	<p>Enter the Quantity Received to indicate how many units were received. The quantity outstanding (how many units are still awaiting delivery) is automatically updated. Qty Outstanding is equal to Qty Ordered less Qty Received.</p> <p>If all items were delivered, present and correct, click the All Received button. The quantity outstanding value for each item will be updated to zero. EVE automatically updates the stock level when you click Save.</p> <p>Note: When you receive a stock item where serial numbers apply, you will get a pop up message to enter the serial numbers.</p> <p>If you are returning an item to the vendor, enter a negative number received. Your stock will be decremented.</p>
Label Qty	You can print labels to stick on received items containing the part number, price and barcode, etc. EVE defaults the number of labels to be printed to be the same as the Qty Received. You can override this value if you wish to print more or fewer labels.
Qty Outstanding	<p>As you update Qty Received, Qty Outstanding is automatically updated. Qty Outstanding is equal to Qty Ordered less Qty Received. If all units are received the quantity outstanding is zero.</p> <p>EVE automatically updates the Number on Order.</p> <p>When you save the delivery, EVE will check Qty Outstanding for each row in the grid and prompt you to change the status of the Purchase Order as follows: if Quantity outstanding is not set to 0, for each row in the grid, you will get a pop up message asking if you want to change the status to Awaiting Backorders. If all rows are set to 0, you will be prompted to choose either a status of Complete or All Received (but invoices are still outstanding).</p>
Qty Ordered	The original Quantity Ordered on the Purchase Order is displayed.
Cost Price	If the price or tax charged by the supplier is different than the values you defined on the original Purchase Order you can keep track of the new prices by overwriting the price and/or tax values in the grid. Other columns of the grid are not editable. The cost of these specific Stock Items will be maintained and

	used for inventory valuation in Stock Items (See Section 5.1.5.Stock Items).
Stock Item	A description of the Stock Item. Corresponds to the Purchase Order Description on the Suppliers tab of the Stock Items form (See Section 5.1.5.Stock Items).
Stock #	Indicates the unique Store Stock Number. The text is not editable.
Manufacturer Stock #	Indicates the Manufacturer Stock Number. The text is not editable.
Stock Type	Indicates the category of the Stock Item, for example, Wetsuit, snorkel, etc. The text is not editable.
Manufacturer	Indicates the Manufacturer of the Stock Item. The text is not editable.
Size	Indicates the Size of the Stock Item. The text is not editable.
Primary Color	Indicates the Primary Color of the Stock Item. The text is not editable.
Secondary Color	Indicates the Secondary Color of the Stock Item. The text is not editable.

Special Orders

If there are special order items on the Purchase Order, the **Special Order** button flashes when you open the Delivery form. Click it to show a list of items and the customer(s) who reserved them. Choose the **Open** button to open a special order item.

Employee	The Employee who originally created the special order is displayed.
Customer	The Customer who made the special order is displayed.
Store	The Store where the special order was placed is displayed.
Stock Item	A description of the Stock Item.
Customer Notification Date	Since you have now received the customer's item(s), you can notify them of the arrival and enter the Date the customer was notified and the Contact Method used to notify them.
Contact Method	

Location	Enter the Location of the item(s) (for example, behind the cash drawer, in service department, etc.) so you can locate it when the customer arrives to pick it up.
Invoice #	The Invoice # of the invoice on which the special order item was sold is displayed.
Purchase Order #	The Purchase Order # on which the special order was purchased is displayed.
Date Picked Up	When the customer picks up their item(s) you can enter the Date they picked up. This is the final action you need to take in the special order process.
Notes on Purchase Order	Any Notes from the Purchase Order will be displayed here.
Notes Not on Purchase Order	

You can click the **Email Notification of Delivery** to automatically generate an email to the customer to let them know their product has arrived.

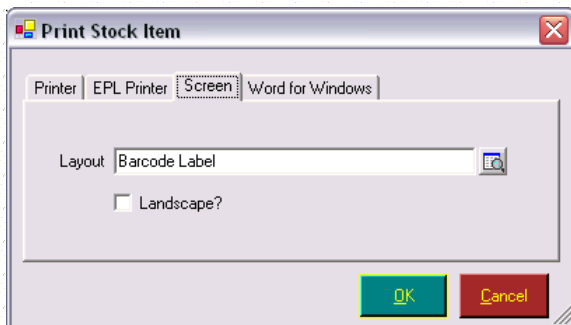
8.1.4 Printing Labels

You can print Labels for each of the stock items you have received. The labels will be printed based on the options you selected when Setting Label Options. (See Section 0.

If you choose Genius, there are additional options.

Merchant Name, Merchant Key, Merchant Site ID	All of these will be assigned to you when you sign up for an account with Cayan.
Genius Device IP	You can find the IP address of the Genius device as follows: 1/ press the 0 button 3 times on the device. 2/ at the prompt, enter the admin password (supplied to you by Cayan). The IP Address is shown at the top of the display.
Display Items on Genius device	Put a tick in the box if you want items added to the shopping basket in EVE to show on the Genius device so the customer can see the price and item description.

Labels Options). By default, labels will be added to a print queue so they can all be printed together in a batch later. Click the **Add to Label Queue button** to add labels for all of the items received on this delivery. The Label Qty you defined above will be used to determine the number of labels to be printed for each stock item. Click **Print Label Queue** to print all labels in the queue.



Choose your print alternative. You can send labels to the Printer, EPL Printer (i.e. Zebra label printer), Screen or Microsoft Word for Windows. All labels in the queue will be printed. If you are running EVE on a network and

labels have been added to the print queue on various PCs, EVE will prompt you to ask if you want to print labels entered on your PC only or for all PCs.

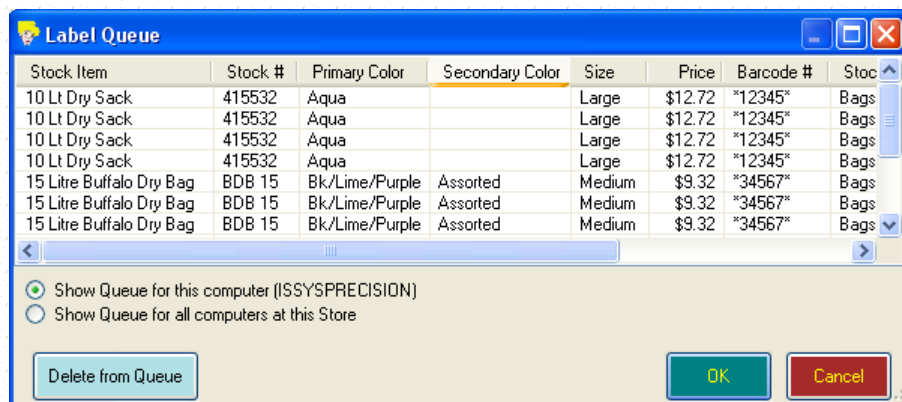
If you print to any destination other than EPL Printer, you will need to have a Barcode Font installed if you want to print a barcode on the label. EVE comes pre-installed with a several barcode fonts called “IDAutomationNNN” where NNN is different for each font and identifies the font size and whether the Human Readable text will be printed underneath the barcode. If you don’t want to use any of these fonts, there are plenty of websites where you can purchase fonts on-line.

EVE has special support for EPL (Eltron Programming Language) printers and will print best quality barcodes that the printer can print. EPL printers have the necessary barcode information programmed into them so you need no external barcode font. EVE Diving recommends using the Zebra GK 420d or and Zebra printer that supports EPL. You can read about these at www.zebra.com. Note: Zebra printers that have a Z suffix in their name do not use the EPL language and therefore will not work using the EPL Printer tab (you can use them to print using the Printer tab but you won’t then get the best quality barcodes).

If you choose to print using Microsoft Word for Windows, you will need to have Word and a barcode font installed. Using this method, you can print onto sheets of Avery (or equivalent) labels.

If you changed the default configuration, so that labels are printed immediately without adding them to a queue, click the **Print Labels** button to print labels for those items in the grid with a value set for the Label Qty. This is only recommended if you have a dedicated label printer.

Label Queue



The label queue will display all labels that are waiting to be printed. You can delete items from the queue by selecting them and pressing the Delete key on your keyboard or using the **Delete from Queue** button.

8.1.5 Supplier Invoices

Use the Supplier Invoices tab to enter information about invoices from your suppliers for the goods received and associated payments you have made for those goods.

Purchase Order: #3783 (OCEANIC)

General Details Deliveries Supplier Invoices

Invoice #	Date	Sub Total	Tax	Freight	Total	Employee	Notes
6338	5/20/2014	\$180.00	0	\$30.00	\$210.00	Chris Brame	

New Invoice Open Invoice Delete Invoice

Barcode # A Store Stock # A Manuf. Stock # A

	Qty Ordered	Qty Outstanding	No. In Stock	Stock #	Manufacturer's	Unit Price	Price	Tax	Total	Stoc
1		0	1	009	009	\$0.25	\$0.25	\$0.00	\$0.25	009
2		0	30	05.4400.2	05.4400.27	\$26.00	\$52.00	\$0.00	\$52.00	ACC

Row Count 8 Qty Count 26 Sub-Total \$1,861.13 Tax \$0.00 Total \$1,861.13

New Save Close

Employee Supplier Get Supplier Open Supplier AB BILLER Store Stock Items PO Status

The Supplier Invoices tab displays all of the information regarding previous invoices (if any) against this Purchase Order. You can click the **Open Invoice** button to review the details of a previous invoice. If an invoice has been entered in error, highlight the invoice and click the **Delete Invoice** button.

New Invoice

If your supplier issues you with an invoice, you can enter details of it and any payments you make against it by clicking on the **New Invoice** button.

PO Invoice: (New #1)

Invoice ID (New #1) PO # 3783

Employee* Chris Brame

Invoice # 6338

Invoice Date* Tuesday, May 20, 2014

Payment Due* Thursday, June 19, 2014

Created Last Updated

Sub-Total* \$180.00

Tax* 0

Freight* \$30.00

Total \$210.00

Notes

Payments

Payment Date	Amount	Payment Method	Payment Number
5/20/2014 4:26 PM	210	Check	3116

New Save Close

Enter details of the supplier invoice(s) in the top part of the form. You may find that suppliers do not always ship all items to you in one go. If there are multiple shipments for one Purchase Order, they may invoice you multiple times. You can enter as many invoices as you like relating to the Purchase Order.

Invoice ID	The Invoice ID is generated by EVE. It will display as (new #XX) where XX is the number of Purchase Order Invoices created in this session of EVE until you save the Purchase Order Invoice at which time EVE will assign a permanent Invoice ID.
Employee	<p>If you selected <i>Default Employee on New Records</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted and you will need to choose one. Choose the employee completing this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Invoice #	Enter the Suppliers Invoice Number here.
Invoice Date	Enter the Date the Invoice was received and processed or if you prefer, you can track the due date of the invoice.
Sub Total	Enter the Sub-Total of the invoice.
Tax	Enter the Tax on the invoice.
Freight	Enter the Freight on the invoice.
Total	EVE will automatically Total the Sub-Total, Tax and Freight.
Purchase Order#	The Purchase Order# that this invoice relates to is displayed.
Notes	Enter any Notes regarding the invoice.

To record details of payments you make relating to the Supplier Invoice(s), type them into the lower half of the form. You can make multiple payments against a single invoice and/or against multiple invoices.

Payment Date	Enter the Date the payment was made. This will default to today's date.
Amount	Enter the Amount of the payment.
Payment Method	Choose the Payment Method from the pop up list box.
Payment Number	Enter in the Payment Number (for example, the check number or other unique identifier).

8.2 Special Orders

Special orders are described in the above processes; however a summary of the process is included here.

1. A customer indicates they want to reserve a stock item because you do not have any in stock so you create a new Special Order in the Sales Module to start the process. At this point the item is marked as reserved but it is not yet added to a Purchase Order.
2. In the Purchases Module, when the supplier of the stock item is selected from the supplier pop up list box, the **Customer Orders** button flashes, to indicate that there are outstanding items reserved. When you click the button a form is displayed which lists all items currently reserved (but not yet added to a Purchase Order) for the supplier.

Select an item and click **Add Item to Purchase Order** to add that item to a Purchase Order (if no Purchase Order is currently selected, a new order is created).

3. During the Delivery process which occurs when items are received from your supplier, if items were reserved for a customer the **Customer Items** button flashes on the Delivery form to show you that you must contact the customer to inform them their item(s) have arrived. Click the button to show a form listing all reserved items. You can indicate the date and notification method for each item.
4. When the customer picks up their item(s) you can update the date picked up to complete the process.

8.3 Purchasing Wizards

8.3.1 PO Top-Up/Restock Wizard

The Purchase Order Top-Up/Restock Wizard provides you a quick and easy mechanism to generate one or multiple Purchase Orders. It can be used in 'Top-Up' mode to bring your inventory levels back to ideal quantities or in 'Restock' mode to replenish items sold in a particular date range (e.g. last week). Access the Wizard by clicking **File** then **Wizards** then **Purchase Order Top-Up/Restock Wizard** on the main EVE screen.

Introduction

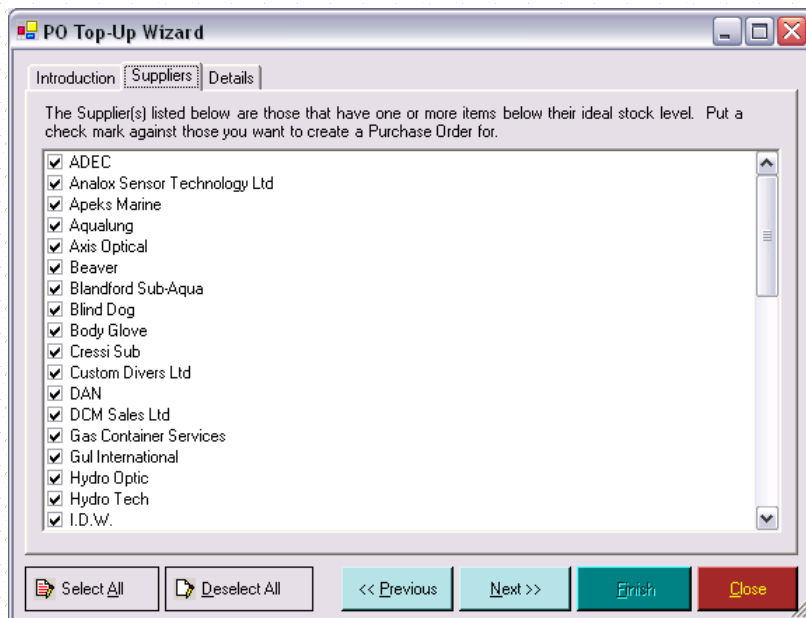
The Introduction Screen explains the purpose of the Wizard and lets you choose whether you want to use it in Top-Up mode or Restock mode. If you choose Restock, you need to choose the date range you are interested in. The Wizard will default to show dates that would restock your inventory based on sales made in the last 7 days, but you can choose whichever date range you wish. You also need to choose a Cost Center. Only items appropriate at that Cost Center will be included.



Suppliers

All of those Suppliers are listed that:

- 1/ in Top-Up mode: have at least one item below ideal stock level.
- 2/ in Restock mode: items have been sold for in the date range supplied.



Select those Suppliers that you want to generate Purchase Orders for by checking the appropriate check box. You can click the **Select All** button and **Deselect All** button to quickly modify your choices.

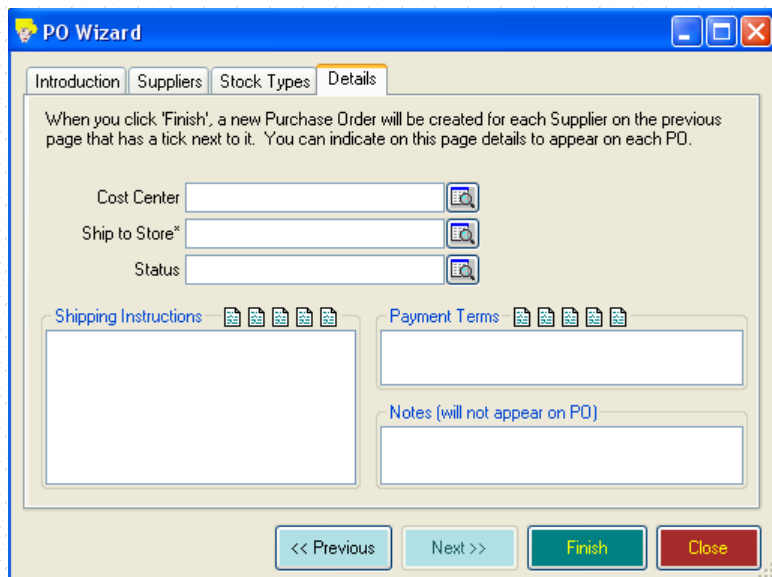
Stock Types

If you only want to order items of a particular Stock Type, choose that stock type in the popup list. Otherwise leave the box blank.

In Restock mode, a check box is visible. Put a check mark in it if you do not want items already ordered in the date range to be ordered again. For instance, if you sold 10 units of a particular item and 4 have already been added to a different Purchase Order, you will only get 6 items added to this Purchase Order. If the box is not checked, 10 will be added.



Details

Use the Details tab to set shipping instructions and payment terms. These details will be written to each Purchase Order you create on this Wizard.



Cost Center

Choose the Cost Center you want the new Purchase Order to relate to.

Ship to Store	If you have multiple stores, you will select the store you wish the goods to be delivered to here.
Status	Choose the Status of the Purchase Order. If you plan to send the Purchase Orders immediately, choose a Status of Sent. Otherwise, if you just want to create the POs now without sending them (for example, if you need to get them checked by an authorized employee or add items over the next few days) choose a Status of Unsent.
Shipping Instructions	<p>Use Shipping Instructions to enter any free-text instructions regarding shipping that you wish. The Shipping Instructions are printed onto the Purchase Order. At the top of the Shipping Instructions text box are 5 icons . You can set these to hold text that you commonly add to a Purchase Order. You can then click on the icon to add the text to the Shipping Instructions field.</p> <p>To define the text for an icon, right click on it. A prompt is shown so you can enter text up to a maximum of two hundred fifty five characters. When creating a Purchase Order next time, click on the text icon and the previously defined text is added to the Shipping Instructions text box.</p>
Payment Terms	Use Payment Terms to enter any free-text instructions regarding payment that you wish. The Payment Terms are printed onto the Purchase Orders. At the top of the Payment Terms text box are 5 icons  . You can set these to hold text that you commonly add to a transaction. You can then click on the icon to add the text to the Payment Terms field.
Notes (will not appear on Purchase Order)	You can add Notes to the Purchase Order that are for your store use only. These notes will not be displayed on the Purchase Orders.

When you click the **Finish** button, multiple Purchase Orders will be generated within the Purchases Module. You can edit each Purchase Order as described above.

8.3.2 Pricing Wizard

The Pricing Wizard provides a quick and easy way to generate Retail Prices across a large number of Stock Items. Access the Wizard by clicking **File** then **Wizards** then **Pricing Wizard** on the main EVE screen.

Introduction

The Introduction tab describes the purpose of the Pricing Wizard.



Task

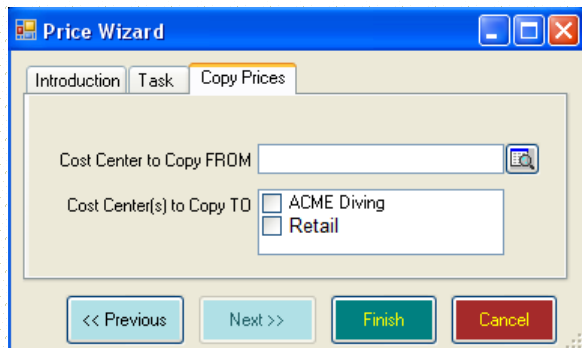
Use the Task tab to identify if you will Copy Retail Prices from one Cost Center to another or if you will be Generating Retail Prices based on a Percentage Mark-up of Cost Price.



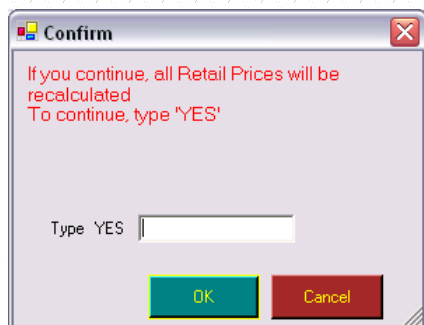
Depending on the option you choose, the final tab will change.

Copy Prices

If you chose Copy Retail Prices from one Cost Center to Another on the Task tab, the Copy Prices tab will be displayed.



Identify the Cost Center you wish to copy prices FROM and the Cost Center(s) you wish to copy prices TO. When you click the **Finish** button, you will be asked to confirm your decision as ALL Retail prices will be recalculated. Any discounts you applied to Retail prices in Stock Items will be automatically applied.



Type YES and EVE will automatically copy the prices. This process may take a few minutes to complete.

Formula

If you chose Generate Retail Prices on the Task Tab, the Formula tab will be displayed.

Price Wizard

Introduction Task **Formula**

Cost Center: ACME Diving

☐ Retail Price = Cost Price + % Use CPs at Store: ACME Diving
☐ Retail Price = Retail Price + %
☐ Retail Price =
☒ Store Sale Price = Student Price + 10 %

<< Previous Next >> **Finish** **Cancel**

Select the Cost Center for which you want to update Retail Prices. You can choose to update Retail Prices based on:

- ❖ **Cost Price plus a Percentage:** For example, suppose you have a Stock Item where the cost price is \$10 and the current Retail Price is \$15. If you choose to change the Retail Price to Cost Price + 72%, then the new Retail Price will be \$17.20.
- ❖ **Retail Price plus a Percentage:** For example, suppose you have a Stock Item where the cost price is \$10 and the current Retail Price is \$15. If you choose to change the Retail Price to Retail Price + 10%, then the new Retail Price will be \$16.50.
- ❖ **Retail Price is a fixed value**
- ❖ You can choose to set a particular Pricing Type to be a percentage of another Pricing Type. In the example in the screenshot above, we're setting the Store Sale price to be the Student Price + 10%

When you click the **Finish** button, you will be asked to confirm your decision as ALL Retail prices will be recalculated. Any discounts you applied to Retail prices in Stock Items will be automatically applied.

Confirm

If you continue, all Retail Prices will be recalculated
To continue, type "YES"

Type YES

OK **Cancel**

Type YES and EVE will automatically copy the prices. This process may take a few minutes to complete.

9 COURSES

The Courses Module helps you to keep track of all your past, present and planned courses. To each course you can assign modules with specific dates & times, instructors, locations and customers. You can use different instructors for each module and also produce training invoices for each course.

You can view customers on courses including amounts paid and owed and see both completed and uncompleted training schedules. When you mark the course as complete, EVE will even prompt you about customers that did not attend all the composite modules before marking them as certified. Use EVE's interface to PADI's PIC On-Line to submit certification data as soon as the course is completed.

You can also track options purchased and expenses associated with the course to ensure your courses are fully profitable. A complete breakdown of the costs incurred for each course can be viewed (instructor salary, pool hire, van hire, fuel costs, etc.). The overall profit is automatically calculated.

9.1 Courses

Select the Courses Module in the Hierarchy or from the Module buttons. Select New Course from the Button Array. The New Course form will be shown. The courses that you set up here will be available when you are Selling Courses (See Section 6.1.4.Selling Courses).

9.1.1 Creating a New Course

General

Use the General tab to enter the most basic information about your course.

General

Modules

Dates

Times

Staff

Locations

Summary

Customers

Options Purchased

Expenses

Stock Items

Requirements

ID 4047

Course Type*

Advanced Open Water Diver

Start Date*

Saturday , May 17, 2014

End Date*

Sunday , May 18, 2014

Course #

AOW 5/17/2014 South

Min No.* 3

Max No.* 6

Status*

Incomplete

Language

More Info

info@scubaland.com

Staff

Staff Member	Role
Brian Akers	Instructor
Jack Ryan	Dive Master

Add

Remove

Notes

Will print on Invoice

WEEKEND

Will NOT print on Invoice

Created 1/14/2014 1:32:09 PM

Last Updated 5/20/2014 5:27:30 PM

Recurrence

◀

▶

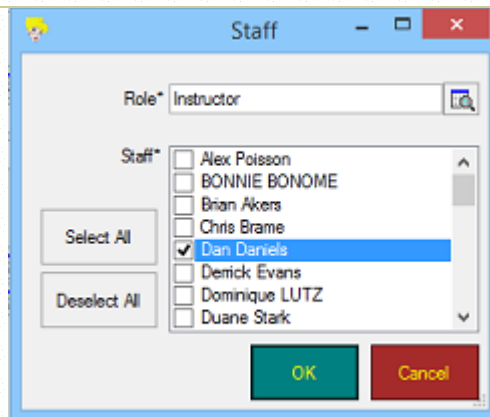
New

Save

Close

Course Type	<p>Select the Course Type from the pop up list box.</p> <p>If the Course Type you need is not listed, click the New Course Type button in the pop up list box and add a new Course Type.</p>
Start / End Date	Set the Start and the End Date for the course.

Course #	The Course # will <i>Default</i> based on the parameters you defined when Setting Course Options (See Section 4.3.5.Courses Options).
Min # / Max #	The Minimum # and the Maximum # will default based on the parameters you defined in Course Types (See Section 4.4.8.Course Types). When selling places on the course, EVE will prompt you if the maximum # is going to be exceeded.
Status	<p>The default Status is Incomplete, which you should not change during the course creation process.</p> <p>When the course is finished, you will change the Status to Complete and you will be prompted to confirm if participating customers are now qualified. You will also be able to start the PIC On Line process.</p> <p>Courses may also be Cancelled, for example if you do not have enough customers enrolled to run the course.</p>
Language	If your store is in a multi-lingual location you may want to choose the Language in which this course will be taught. You can then add customers that speak that language.
More Info	If you use EVE OnLine (the companion product to EVE that lets you sell your products, courses and trips on-line) you can put an email address in the More Info box. Then a link will appear in the Activities widget on your website next to the course and your customers can click it to send an email to you asking for more information.
Notes: Will print on Invoice	Add any Notes that are pertinent to this specific course. These notes will be displayed on the Invoice when Selling Courses (See Section 6.1.4.Selling Courses).
Notes: Will NOT print on Invoice	Add any internal notes that are pertinent to this course. These notes will NOT be displayed on the Invoice - they are for internal use only.
Staff	<p>You can add staff members to the teaching staff for this course by clicking the Add button and selecting them from the pop up list box.</p> <p>If you have checked the <i>Only Staff Allowed to Teach the Course Type can be Added checkbox</i> when Setting Course Options (See Section 4.3.5.Courses Options), only those staff members authorized to teach this specific course in Employees (See Section 4.4.15.Employees) will be listed.</p> <p>Otherwise, only those staff members who have been identified as an instructor or dive master will be displayed. Add all of the staff members who will be involved in teaching any element of the course.</p> <p>Along with the staff member's name, you should pick the Role that they'll play on the course - e.g. Instructor, DiveMaster, etc.</p>



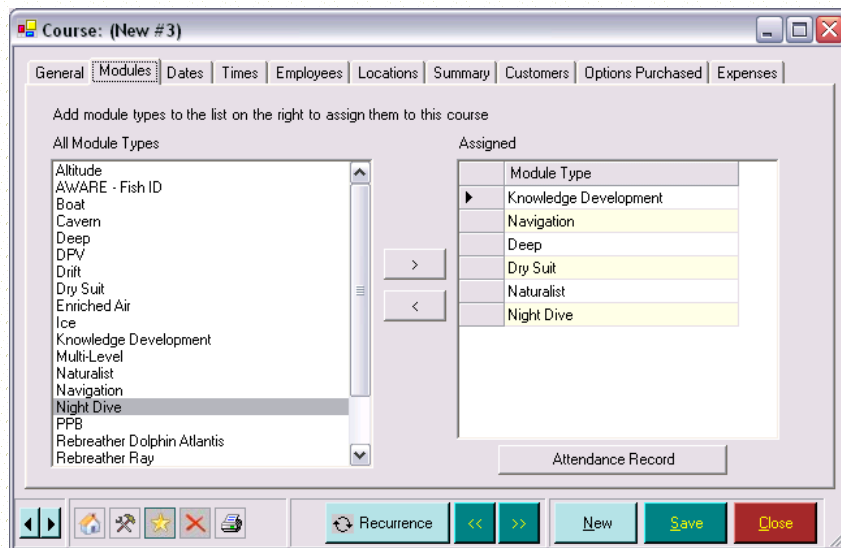
The list of potential roles is taken from the Task Types you have defined that have the “Course Role” box ticked - see section 4.4.33. You can associate a stock item with each Task Type and then run reports to see how much you need to pay each staff member for the courses they have taken (among other things).

To remove a staff member, select them and click the **Remove** button.

9.1.2 Adding Additional Course Data

Modules

If you choose, you can use the Modules tab to identify the modules (for example, each Classroom session, Pool Dive and Ocean Dive may be considered a module), that will be offered for this specific course. Using this functionality will allow you to use the full power of the Calendar and to track customer attendance at each step of the course.



The full list of module types you pre-defined (See Section 4.4.8.Course Types) for the Course Type chosen on the General tab is shown in the All Module Types list. If you checked the *Auto Add to New Course checkbox* for a specific module type in Course Types, it will be automatically added to the assigned list. You can add additional modules by highlighting them in the All Module Types list and clicking the **Add button**.

To remove a module, select the module in the assigned list and click the **Remove button**.

You will not use the Attendance Record when setting up a new course. This functionality is used later to record customer attendance at particular modules in order to track customer progress towards course completion.

Dates

If you wish, you can use the Dates tab to enter the date of each module associated with the course.

General	Modules	Dates	Times	Employees	Locations	Summary	Customers	Options Purchased	Expenses
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
						1	Module Type Start Date		
							Knowledge Development April 4, 2006		
							Navigation April 8, 2006		
							Naturalist April 8, 2006		
							Deep April 9, 2006		
							PPB April 9, 2006		
							Night Dive April 8, 2006		
2	3	4	5	6	7	8			
9	10	11	12	13	14	15			
16	17	18	19	20	21	22			
23	24	25	26	27	28	29			
30									
Year: 2006 Month: April									

The Date tab displays both the calendar for the full course and the individual modules. The Start Date and End Date (set on the general tab) for the entire course will be marked on the calendar with blue boxes around the two dates.

If you defined a Default Day of the Week for a module in Course Types, the start date of the module will be defaulted here based on the Start Date plus the number of days identified. You can edit this date or add a date as follows:

Module Type	Highlight the Module Type on the right hand side of the form and then click on the appropriate date on the calendar to set the date of the module.
Start Date	<p>As you add each module, it will be displayed on the calendar and the Start Date will be filled in.</p> <p>If you checked the <i>Insist on at Least One Module Being on the Course Start Date</i> checkbox when Setting Course Options (See Section 4.3.5.Courses Options), you will receive a message if you try to save this course without this condition being met.</p> <p>If you checked the <i>Insist on at Least One Module Being on the Course End Date</i> checkbox when Setting Course Options (See Section 4.3.5.Courses Options), you will receive a message if you try to save this course without this condition being met.</p>

If more modules are assigned to a single date than can be displayed on the calendar, scrolling arrows will appear on the date. You can scroll through the calendar years and months by using the scrolling arrows at the bottom of the calendar or by selecting a specific year or month from the drop-down lists.

Times

If you wish, you can use the Times tab to enter the specific start and end time of each module associated with the course.

Course: AOW 04/04/2006

General Modules Dates Times Employees Locations Summary Customers Options Purchased Expenses

Start Time 1pm

End Time 4pm

Apply to All Modules

Module Type	Start Time	End Time
Knowledge Development	8:00 AM	7:00 PM
Navigation	8:00 AM	12:00 PM
Naturalist	1:00 PM	4:00 PM
Deep	8:00 AM	12:00 PM
PPB	1:00 PM	4:00 PM
Night Dive	5:00 PM	8:00 PM

Recurrence << >> New Save Close

If you defined a Default Start Time in Course Types, the start time will be defaulted here.

If you defined a Default Duration (Mins) in Course Types the end time will be defaulted here based on the start time plus the duration. You can edit these times or add a time as follows:

Module Type	Highlight the module type(s) on the right hand side of the form.
Start Time	Enter the start time and end time. You can type in the time using either the 24-hour clock or by indicating am or pm.
End Time	Alternatively, you can select a module (or multiple modules) and type the time into the clock section on the left hand side of the form. If the same start or end time applies to all modules, type it into the clock section and click the Apply to All Modules button. The clock will display the start or end time you have identified.

Staff

If you wish, you can use the Staff tab to assign staff to each module associated with the course.

Course: AOW 04/04/2006

General Modules Dates Times Employees Locations Summary Customers Options Purchased Expenses

☐ Donna Gervais

☒ Doug Peabody

Apply Apply to All

Module Type	Employees
Knowledge Development	Donna Gervais+Doug Peabody
Navigation	Donna Gervais
Naturalist	Donna Gervais
Deep	Donna Gervais
PPB	Doug Peabody
Night Dive	Doug Peabody

Recurrence << >> New Save Close

The staff members that you have identified on the General tab will be listed on the left hand side of the form. The modules that you have identified on the Modules tab will be listed on the right hand side of the form.

If you defined a Default Instructor in Course Types that staff member will be defaulted. You can assign other staff as follows:

Module Type	Highlight the Module Type(s) on the right hand side of the form.
Staff Members	Check the staff member and click the Apply button. You may select multiple modules and/or multiple staff members. You may also apply the staff members to all modules by clicking the Apply to All button.

Locations

If you wish, you can use the Locations tab to enter the specific Locations of each module associated with the course.

Module Type	Location
Knowledge Development	Classroom
Navigation	Local Dive Site
Naturalist	Local Dive Site
Deep	Local Dive Site
PPB	Local Dive Site
Night Dive	Local Dive Site

Buttons: Apply to All, Recurrence, New, Save, Close

All Locations that you have created in Locations will be listed on the left hand side of the form. The modules that you have identified on the modules tab will be listed on the right hand side of the form.

If you defined a Default Location in Course Types the location for each module will be defaulted. You can edit these locations or add a location as follows:

Module Type	Highlight the Module Type on the right hand side of the form.
Location	Check the Location. If one location applies to all modules, select the location and then click on the Apply to All button.

Summary

The Summary tab provides a convenient place to check or edit your course set up. All of the information associated with your course is displayed here.

Module Type	Start Date	Start Time	End Date	End Time	Location	Display Order	Module Notes	Dive Profile	Last Updated	Module ID
Knowledge Development	February 29, 200		February 29, 200		Cheil Beach	1			19/02/2002 3:24 PM	344
Navigation	February 29, 200		February 29, 200		Cheil Beach	3			19/02/2002 3:24 PM	345
Deep	March 1, 2000		March 1, 2000		Cheil Beach	4			19/02/2002 3:24 PM	346
Wreck	March 1, 2000		March 1, 2000		Cheil Beach	6			19/02/2002 3:24 PM	347

Employees on Module: Employee, Employee Notes, Pay for Module, Tax, Total, Last Updated

Buttons: Recurrence, New, Save, Close

The top part of the form provides information specific to the modules. In addition to the fields already discussed, you will see:

Display Order	Most modules need to occur in a fixed order (for example, Classroom Session One must be run before Classroom Session Two). By default, modules are sorted in ascending Display Order. The Display Order is not editable here since it will be the same for each course of the same type. It is defined in Course Types (See Section 4.4.8.Course Types).
Module Notes	Make any Notes that are pertinent to this specific module.
Dive Profile	<p>Enter any details specific to the Dive Profile, for example, you may wish to note the maximum depth for a dive or a specific piece of equipment that may be required by all divers.</p> <p>You may also use this field after the course to record specific details about the dive profile that applies to all customers/staff on the dive. Individual dive details are entered in the Customer Module.</p>
Last Updated	This indicates the date/time the record was last modified. It is not editable.

The bottom part of the form provides information specific to the Employees who will teach this course. As you highlight a module at the top of the form, the Employees associated with that specific module will be displayed. In addition to the fields already discussed, you will see:

Employee Notes	Make any notes that are pertinent to this specific employee for the module chosen.
Pay For Module	<p>If you have already defined specific module rates for an employee in Employees (See Section 4.4.15.Employees), the amount will be defaulted here.</p> <p>Otherwise, enter the amount before tax that you will pay the instructor for teaching the module.</p>
Tax	EVE will calculate the Tax based on the tax band you defined for the Instruction Stock Type record in Stock Types (See Section 5.1.6.Stock Types).
Total	<p>EVE will calculate the Total based on the pay for module plus the tax amount.</p> <p>If you prefer, you can enter in the total amount and EVE will calculate the pay for module and the tax.</p>
Last Updated	This indicates the date/time the record was last modified. It is not editable.

Customers

You will not usually use the Customers tab when setting up a new course - instead customers will be automatically enrolled when places on this course are sold in the Sales Module. Having said that, you can click the “Add” button to add customers directly onto the course. The way the Add button works depends on whether you have ticked the “Show Booking Prompt when Customers Added on Course form” box on the Courses tab of the Options form - see section 4.3.5. If that box is ticked, EVE will show the Course Booking Wizard so you can sell a place on the course to the customer. If the box is not ticked, EVE will simply show the Customer Search form so you can add a customer directly without selling it. Regardless of whether the box is ticked or not, you can click the down arrow button to the right of the Add button. EVE will show the 2 options described above on a popup menu so you can choose how the customer should be added.

Options Purchased

You will not use the Options Purchased tab when setting up a new course - instead, you will sell a customer a place on the course and also sell them options associated with the course (additional material, upgrades, equipment, etc.) in the Sales Module. You can use this form to track the specific course options purchased. This section is used later to review and manage purchases associated with a specific course and to manage profitability.

Expenses

You will not use the Expenses tab when setting up a new course. This section is used later to review and manage expenses associated with a specific course and to manage profitability. E.g. you could enter the fuel costs to take students to the dive site and dive-site entry fees, etc.

Stock Items

The Stock Items tab lists any Stock Items that can be used to sell places on the Course. For instance, you could create stock items for Regular Price, Executive Price, etc. You must have at least one stock item listed here or you can't sell places on the Course.

Note: you can set up Stock Item 'Rules' for Courses - see Stock Item Links on page 163. Whenever a new Course is saved (or if you click on the Stock Items tab before saving), EVE runs all stock item rules to determine if any stock items can/should be automatically linked to the Course. E.g. you could have a Stock Item called 'Executive Open Water' and set up the rules so that whenever a new OW Exec course is created, the 'Executive Open Water' item is automatically linked to it.

If you save the new Course and there are no stock items linked to it, EVE shows a prompt asking if you want to create a stock item. EVE comes pre-populated with Stock Items for all PADI course types so you will only see this prompt if you have created your own Course Types - e.g. for Distinctive Specialties.

If the Course is a 'one-off' (unlikely since you probably run multiple courses of the same type), choose the 'It will be used to sell this Course only' option.

If you will run multiple courses of this type at the same price, choose the 'It will be used to sell all Courses that match the following' option and then choose the appropriate options in the lower half of the form.

Requirements

You will not use the Requirements tab when setting up a new course - instead, you will sell a customer a place on the course and also identify their gear requirements for the course in the Sales Module. You can use this form to track the equipment each customer requires for a specific course and use it as a prompt to rent gear or alternatively to assist the customer in making additional gear purchases.

Course: AOW 5/17/2014 South

General	Modules	Dates	Times	Staff	Locations	Summary	Customers	Options Purchased	Expenses	Stock Items	Requirements
Customer	Masks		[Any]	L/XL							
Heath Adkins	Fins		[Any]	S 5-6	XSM	M 6-7	L 10-11				
HAYLEY ADAMS	Snorkels		[Any]								
Hill Abell	BCDs		[Any]	XS/S	10-14	8-12	M/L				
	Regulators		[Any]	S/M							
	Wet Suits		[Any]	Small	Medium	Large	Extra Large				

Recurrence New Save Close

Creating a Recurring Course

You may run courses on a regular basis and find that you can use one course that exactly or closely matches your ongoing needs to create a recurring course and speed up your data entry. For example, you may run an advanced class on the third weekend of every month or you may offer an ice diving certification on the second weekend in March every year.

9.1.3 Creating a Recurring Course

Course: AOW 04/04/2006

General	Modules	Dates	Times	Staff	Locations	Summary	Customers	Options Purchased	Expenses
ID									
Course Type*	Advanced Open Water Diver								
Start Date*	April 4, 2006								
End Date*	April 9, 2006								
Course #	AOW 04/04/2006								
Min No.*	0	Max No.*	8						
Status*	Incomplete								
Language	English								
Notes									

Recurrence

Recurrence

Daily Weekly Monthly Yearly

Every 1 day(s)

Every Week Day

Every Week End Day

Starting On March 25, 2006

Ending On March 25, 2006

OK Cancel

Once you have set up a course that closely or exactly matches your ongoing needs, click the **Recurrence** button to generate multiple identical courses. You can create a recurring course on a Daily, Weekly, Monthly or Yearly basis. Select the option that most closely matches your recurrence, select a starting on and ending on date. The course and all of the data you have attached to it will be duplicated using the dates you defined.

When you click **OK**, a summary page will be displayed that shows a Calendar view of the courses that will be created. Confirm that the dates look as you intended before continuing.

Another way of duplicating courses is by copying and pasting them on the Calendar - see chapter 15

9.2 Customer Enrolment

9.2.1 Enrolling Customers

Generally, you will enroll a customer on a course by Selling Courses (See Section 6.1.4.Selling Courses) to them in the Sales Module. As part of that process, you select the specific course that the customer wants to register on, collect a deposit or full course payment and the customer is automatically enrolled.


Customers


Occasionally you may want to manually add a customer to a course directly on the Courses form by accessing the Customers tab.

Customer	Date Confirmed	Enrollment Status	Completion Status	Tel (H)	Tel (W)	Tel (M)	Email
CASEY PADULA		Enrolled	Ongoing	9332093329	2063423300		CASEY@yahoo.com
CHARLES PADULA		Enrolled	Ongoing	9333562355			CHARLES@yahoo.com
CHRIS JONES		Enrolled	Ongoing	9336633840			CHRIS@yahoo.com
CHRIS PADUANO		Enrolled	Ongoing	9642352408			CHRIS@yahoo.com
DON PADEN		Enrolled	Ongoing	9646288680			DON@yahoo.com
JUAN PADILLA		Enrolled	Ongoing	9333429393	2064477540		JUAN@yahoo.com
TARA PALAZZOTTO		Enrolled	Ongoing	2063235032			TARA@yahoo.com
TONY PALACIOS		Enrolled	Ongoing	9334238835			TONY@yahoo.com
VADIM SAAKOV		Enrolled	Ongoing	5434534534	2626236529		VADIM@yahoo.com

Click the **Add** button to bring up the Customer Search box so you can find the customer(s) to add to the course. Select a customer in the grid and click the **Remove** button to remove him/her from the course. If you need to edit customer details, highlight the customer and click the **Edit Customer(s)** button to bring up the Customer file.

The following information about the customer is displayed.

Customer	The Customer name is displayed. This field is not editable.
Date Confirmed	You can enter the Date you contacted the customer to confirm their course enrollment. Use the F8 key to enter the current date and time.
Enrollment Status	Select or change the Enrolment Status of the customer from the pop up list box. Usually you will leave this set to Enrolled.
Completion Status	You can edit the Completion Status by selecting a new status from the pop up list box. If you use the Course Completion process (See Section 9.2.3.Completing a Course), the status for each customer will be updated by EVE and you will not usually need to change this column manually.
Tel (Home)	Phone and email details for the customer are displayed.
Tel (Work)	Select one or more customers and click the  Email button to send an email them.
Tel (Mobile)	

Email	Select one or more customers and click the  SMS button to send an SMS text message to them. The Mobile phone number displayed here will be used.
Course Price	Details about the course price and amounts paid/owing by the customer are displayed (pre and post tax). The course price includes any options that have been packaged together with the course in Stock Items.
Course Tax	
Course Total	
Paid (Pre-Tax)	
Paid (Tax)	
Total Paid	
Amount Owed	
Certifying Instructor	
Certification Date	
Date PADI Notified	
Date Cert Received	
Cert #	
PIC Status	
Referral?	
Referral Store	
Pre-Registration?	
Notes	
Last Updated	
A/R Balance	
Certification Type	At time of writing this is one of Standard, e-Learner and Touch. The value defines whether a Registration Code should be provided before PIC submission. i.e. EVE will expect a Registration code to be present for an e-Learner and a Touch PIC but not for a standard PIC.

9.2.2 Tracking Attendance

Attendance Record

You can track individual customer attendance for each module of the course by clicking on the **Attendance Record button** on the Modules tab. You can also track customer attendance for a course in the Certifications section of the Customers Module (See Section 7.2.5.Adding Certifications).

Attendance Record

Course: Advanced Open Water Diver / AOW 6/5/2005

Customer: CHARLES PADULA

Module Type	Attended?	Test Score	Notes
Knowledge Development	<input type="checkbox"/>		
Navigation	<input type="checkbox"/>		
Boat	<input type="checkbox"/>		
Cavein	<input type="checkbox"/>		

Select All Deselect All OK Cancel

You can click the **Select All** button and the **Deselect All** button to rapidly change your selections.

Course	The specific Course you are tracking attendance for is displayed.
Customer	The Customer whose attendance you are tracking is displayed.
Module Type	Each of the Modules that form a part of this course is displayed.
Attended	Check the Attended box to indicate that the customer completed the requirements associated with the module.
Test Score	You can track specific Test Scores for each module. Text or numeric data may be entered.
Notes	Enter any Notes specific to the module for the customer.

9.2.3 Completing a Course

When a course is complete, you can edit individual information for each customer on the course or edit the information for the course as a whole (recommended).

Change the status of the course on the General tab to Complete. EVE will show a form that lets you review the Attendance and Completion data for each customer on the course in turn. Customers who have not attended all modules on the course have a note in red on the Attendance record. Customers who have attended all modules on the course have a note in green on the Attendance record.

Course Completion

Student #1: VADIM SAAKOV

Attendance Record: Did NOT complete All Modules

Certifying Instructor: [Field]

Certification Date: April 19, 2006

Mark Student As...

- ☐ Certified
- ☐ Referred to Another Store
- ☐ Moved Course
- ☒ Failed

Add Interest in the following Con-ed Courses

[Field]

Attendance Details Apply Cancel

Student	The Customer Name is displayed. As you complete the information for this customer and Apply the data, the next Customer Name from the course will be displayed.
Attendance Record	<p>The Attendance Record indicates whether or not the customer attended all modules. Customers are highlighted in red if they did not attend all sessions. Customers are highlighted in green if they did attend all sessions. Use the Attendance Record button to make changes as required.</p> <p>Customers can only be certified if they have met the attendance requirements.</p>
Certifying instructor	The Certifying Instructor field is available only if the customer is marked as Certified.
Certification Date	The Certification Date is available only if the customer is marked as Certified. Today's date is defaulted. You can change or edit the date as required.
Mark Student As	You can mark the customer as Certified, Referred to Another Store, Moved Course or Failed. Customers marked as Certified will be moved into the PIC process.
Add Interest in Following Con-Ed Courses	Before clicking the Apply button you can choose to put checkmarks against one or more of the follow-on courses to mark the customer as being interested in them. Courses shown in the list are those that are marked (in the Course Types section of the Data Module - See Section 4.4.8.Course Types) as having the course just completed as a prerequisite.

Once you have applied completion details for each of the customers you can return to the Summary Tab in Courses and review the following fields:

Certifying Instructor	The Certifying Instructor is displayed.
Certification Date	The Certification Date is displayed.
Date PADI Notified	You can track the date that you sent the PIC to PADI. If you use EVE's interface to the automated PIC On-Line process, this field will be defaulted to the PIC processing Date.
Date Cert. Received	Enter the Date the certification card was received at your dive center.
Cert #	Enter the customer's Certification Number.
PIC Status	<p>When a customer is enrolled on a course, their PIC Status is defaulted to Pending.</p> <p>If you use EVE's interface to On-Line PICs, you will not usually need to change the PIC Status since EVE will update it to Notified On-Line for you when a PIC is uploaded.</p> <p>In some cases, you may want to update the status to No Notification temporarily while you get information from the customer. EVE will not add the certification to the PIC in this state.</p> <p>If you send PICs through the post to PADI, you may want to update the PIC Status to Notified by Post.</p>
Referral	If you referred this customer to another store, the <i>Referral checkbox</i> will be checked and you can enter your Store number here.
Referral Store	

Pre-Registration	If the customer has Pre-registered for the course with PADI you can check the pre-registration box.
Notes	Enter any Notes associated with the customer on this course.
Last Updated Date	The Date this information was last updated is displayed. It is not editable
CustID	The Customer's unique ID is displayed.
CustCourseID	This is a system field and cannot be edited.

9.2.4 PIC Online

You can use EVE's interface to the PIC Online process found on the **PADI menu** at any time to submit any outstanding PICs. As customers are processed on courses, EVE checks whether details of the customer certifications are suitable for upload to PADI. The following factors are checked by EVE to determine whether a certification is suitable:

- ❖ The customer is marked as Certified on the course in question
- ❖ The PIC status on the certification is Pending
- ❖ The Course Type of the course in question is marked as Uploadable to PIC (See Section 4.4.8.Course Types)
- ❖ The Course Type of the course in question has a valid PIC Key value set (See Section 4.4.8.Course Types).

System Requirements

Use EVE's On-Line PICs feature to upload details of customer certifications to PADI across the Internet. To use the On-Line PICs you need to have a means of accessing the Internet via an Internet Service Provider (ISP).

Processing PICs

Click the PADI globe or the **PADI menu** and choose the PIC Online option.

The screenshot shows the 'PIC Online' window. At the top, there are search filters for 'Course Type' and 'Instructor', both set to '[Show All]'. To the right, it displays 'Credits for Store Acme Diving, #7016' with 'PIC Credits: 221, EFR Credits: 95, DSD Credits: No Limit'. Below this is a tabbed interface with 'Pending' selected. The main area is a table with the following data:

First Name	Last Name	M	Course Type	Status	Date of Birth	Address Line 1
ANTHONY	ALBERTSON	B	Altitude Diver	-Valid-	8/11/1925	P.O. BOX-0877
Michael	Froggett		Altitude Diver	Student Image File not found.	4/4/1965	6 Bute Gardens
Darin	Milne	T	Advanced Open Water ...	-Valid-	3/25/1968	138 ROCK RD
ED	JONES		Advanced Open Water ...	No Certification Date. No Certifying Instructor.	1/20/1956	82 FOREST LAKE D
KJELO	ERIKSEN		Atlantis/Dolphin Rebre...	-Valid-	1/20/1956	70 BROUGHTON A.
KENNETH	FADDEN		Altitude Diver	-Valid-	5/14/1957	20 HY VUE DR
Roger	Lockwood		Open Water Diver	No Date of Birth. No Address Line 1.		
Peter	Smith		Adventure Diver	-Valid-	12/15/1983	604 WASHINGTON
VAL	AAKINS		Open Water Diver	No Date of Birth. No Certifying Instructor.		415 DELAFIELD AV
BILL	FAGNAN		Discover Scuba Diving	-Valid-	11/22/1959	55 LESTER AVE
ALFRED	HABER		Discover Scuba Diving	-Valid-	4/4/1965	111 GRAND AVE
TERESA	SABATINI		Open Water Diver	-Valid-	3/25/1968	476 SKYLINE LAKE
KRISTA	SARATINI		Open Water Diver	No Date of Birth. No Address Line 1. No State. No Certifying In		

At the bottom right, it says 'Count: 35'. There are four buttons: 'Open Certification Record(s)...', 'Open Customer Record(s)...', 'Send to PIC Online', and 'Close'.

A form will be shown that lists all Pending PICs - including DSDs and EFRs.

The Status column lists any missing information that you need to add to the Customer and/or Certification record before uploading to PADI. Select one or more rows in the grid and click the **Open Certification Records** button to open the selected certifications so you can make changes (e.g. add a Certifying Instructor or

Certification Date, etc.) or click the **Open Customer Records** button to make changes to the customer (e.g. add a Date of Birth, etc).

Above the grid are 2 picklists that let you filter the grid to only show certifications of a particular course type or certifications for a particular instructor. At the top right of the form are shown the number of PIC Credits and EFR Credits that you have available at the active Store.

When you're ready, select the certifications that you want to upload (you can use the red notepad icon at the bottom left to Select All or press Ctrl A) and then click the **Send to PIC Online** button. The PIC Online Policies and Procedures page will be shown and you will have to click 'I Agree' to continue. At this point, the certifications will be uploaded over the Internet to PADI. In a difference to previous versions of EVE, the PADI PIC Online web page is no longer shown - i.e. there is nothing else you need to do at this point.

If a certification is successfully processed, the Student's Certification number will be returned by PADI and will be automatically saved onto the customer's Certification record in EVE. If there is a processing error (e.g. age requirements not met or invalid student image submitted, etc.) the error will be shown in the Status column for that record. You can correct the error and resubmit.

If record(s) are successfully processed, a Print prompt will be shown so you can print temporary card(s). You can print two copies - one for the student and one for yourself. By default, one temporary card will be printed per page. If you want to print 2 per page (and cut the sheet in half) to save paper, please contact EVE Diving. The format of the temporary card layout is not editable.

If, when you use PIC Online for the first time, you find there are certifications listed that you do not want to upload (e.g. because you have already submitted them to PADI by post using the paper PIC form) you can select them, right click on the selected area and then click Update PIC Status. Choose 'Notified by Post' and click OK. click on the **Pending PIC Certification** link (See Section 9.2.4.PIC) and update them in one go to a different PIC status of your choice.

When uploading PICs for the first time, you may see a PIC Credentials form where you are required to enter your PADI Pros Username and Password. If you choose, you can put a tick in the 'Save Credentials to Store record in EVE' box to save the details onto the EVE database so you do not need to enter them again in future.

You can click on the Upload History tab to see details of certifications previously uploaded to PADI. Use the Course Type, Instructor and/or Date filters to find the certifications you are interested in. You can select one or more rows in the results grid and click the Print button to reprint temporary cards. This is only permitted within 3 months of the upload date.

9.3 Course Expenses and Profits

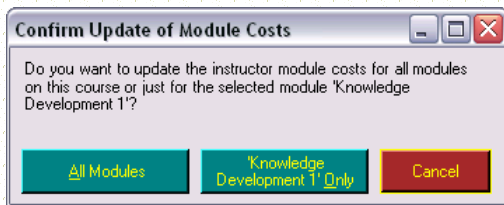
Tracking course profits and expenses is critical to ensuring your education department is run as a profitable profit centre. Course costs and expenses can be found on four key screens.

Summary

The Summary tab holds information on Instructor costs for all modules. You can enter Instructor module costs to calculate the amount you have paid for staffing.

Pay For Module	If you have already defined specific module rates for an employee in Employees (See Section 4.4.15.Employees), the amount will be defaulted here. Enter the amount before tax that you will pay the instructor for teaching the module.
Tax	EVE will calculate the Tax based on the tax band you defined for the Instruction Stock Type record in Stock Types (See Section 5.1.6.Stock Types).
Total	EVE will calculate the Total based on the pay for module plus the tax amount. If you prefer, you can enter in the total amount and EVE will calculate the pay for module and the tax.

If you set the costs up for each module in the Module Costs section of Employees (See Section 4.4.15. Employees), you can use the *Calculate Staff Module Costs* item on the Options menu (See Section 4.3.5. Courses Options) to automatically calculate costs.



Module costs are automatically added to the Summary tab. One row is shown in the list for every instructor + module combination. The amount the store owner needs to pay each instructor for each module is shown.

9.3.1 Tracking Course Revenue

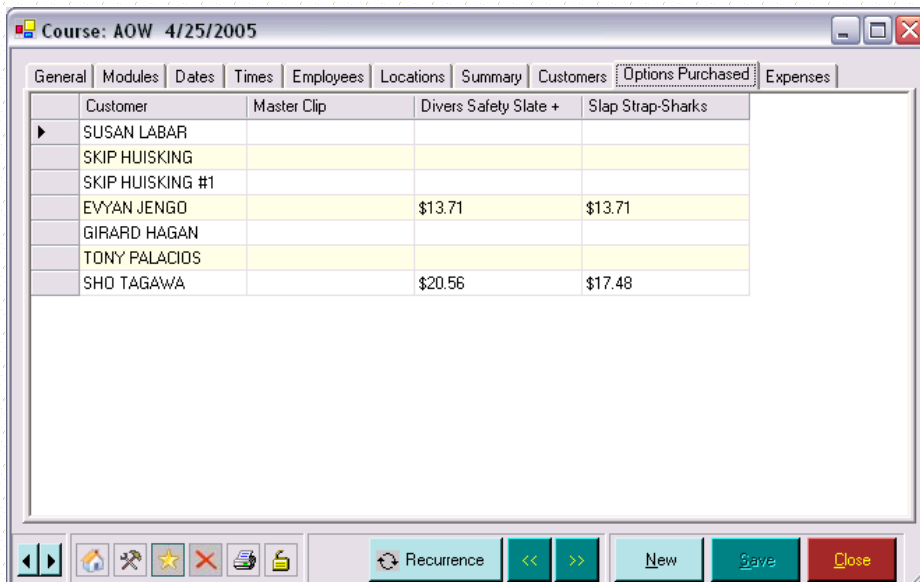
Customers

You can track the amount that customer's have paid for the course on the Customers tab.

Course Price	Details about the course price and amounts paid/owing by the customer are displayed (pre and post tax). The course price includes any options that have been packaged together with the course in Stock Items (See Section 5.1.5. Stock Items).
Course Tax	
Course Total	
Paid (Pre-Tax)	
Paid (Tax)	
Total Paid	
Amount Owed	
Deposit Paid	

Options Purchased

You can track the amount of course costs spent on options purchased. These are items that were packaged together with the course in Stock Items (See Section 5.1.5. Stock Items). When Selling Courses (See Section 6.1.4. Selling Courses) you will be able to sell the options.



Customer	Each of the customers on the course is displayed.
Options	Each of the options packaged with the course stock item is displayed. The amount paid for the option (pre tax) is displayed.

9.3.2 Tracking Course Expenses

Expenses

You can enter expenses associated with the course on the Expenses tab.

Item	Amount	Tax	Total	Tax Band	Tax Rate	Expense Date	Employee
15 Ltr Cylinder Boo	\$10.00	\$0.30	\$10.30	State Tax (3%)	3	06/12/2005 6:31 PM	Shannon Kozak
12 Ltr Cylinder Boo	\$2.00	\$0.06	\$2.06	State Tax (3%)	3	06/12/2005 6:31 PM	Shannon Kozak
12 Ltr Cyl Net	\$33.00	\$0.99	\$33.99	State Tax (3%)	3	06/12/2005 6:31 PM	Shannon Kozak

Sub-Total: **\$45.00** Tax: **\$1.35** Total: **\$46.35**

When you Add an expense item, you will select a Stock Item to add.

Item	The description of the Stock item is displayed.
Amount	<p>Enter the Amount of the item. This may be the cost price if you removed this item from inventory or another amount if you purchased the item outside of your establishment.</p> <p>Note: entering a stock item as an expense does NOT remove the item from inventory / stock amounts at this point. If you to remove the item from inventory you must send the Expenses to an Invoice - see the Invoice # description below.</p> <p>Amounts are sub-totaled and displayed at the bottom of the form.</p>
Tax	<p>The Tax is calculated based on the tax band associated with this Stock Item.</p> <p>Tax is sub-totaled and displayed at the bottom of the form.</p>
Total	<p>The Total is based on the amount plus the tax. If you prefer, you can enter the Total and EVE will calculate the amount.</p> <p>A grand Total is displayed at the bottom of the form.</p>
Tax Band	The Tax Band associated with the item is displayed.
Tax Rate	The Tax Rate associated with the tax band is displayed.
Expenses Date	Enter the Date the expense was incurred.

Employee	<p>If you selected <i>Default Employee on New Records</i> when Setting Data Entry Options, the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted.</p> <p>Choose the employee completing this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Notes	Enter any Notes associated with this expense.
Invoice #	<p>Once you have identified all of the Expenses on the course, you can send them to an invoice. To do this first select those expenses in the grid that you want to send. Then right click on the selected area and click Send To then New Invoice. A new Invoice will be created with an Expenses Invoice Type. Once you have saved the invoice, inventory levels will be updated (if appropriate) and the Invoice number will be shown in the Invoice # column in the Expenses grid.</p>
Created	The date this expense line was created is displayed.
Last Updated	The date the last time this expense line was edited is displayed.

10 TRIPS

The Trips Module helps you to keep track of all your past, present and planned trips. To each trip you can assign dates, notes, employees and customers. The Trips Module is where you will set up trips, record details about them, and also link them to Stock Items, so that they can be found and sold within the Sales Module. You can use the module to set up vacations where you take a number of divers for several days (Vacation Trip) and/or it can be used to set up daily dive boat trips or charters (Day Trip).

10.1 Vacation Trips

Select the Trips Module in the Hierarchy or from the Module buttons. Select New Trip (as opposed to New Day Trip) from the Module Buttons. The New Trip entry form will become active. The trips that you set up here will be available when you are Selling Trips (See Section 6.1.5.Selling Trips).

10.1.1 Creating a New Vacation Trip

General

Use the General tab to enter the basic information about your vacation trip.

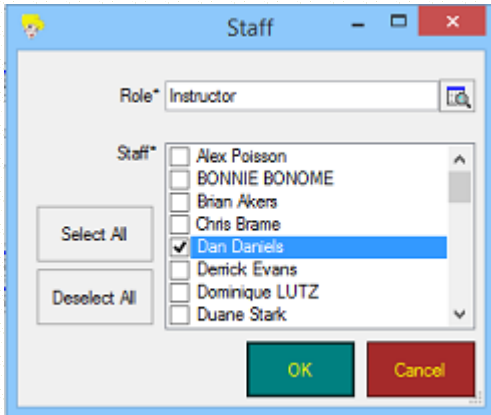
The screenshot shows the 'Trip: (New #1)' form with the following details:

- Tabs:** General, Customers, Options Purchased, Requirements, Expenses, Sub-Trips, Stock Items, Seat Planner.
- General Tab Fields:**
 - ID (New #1)
 - Destination: Texas Flower Gardens
 - Start Date: Wednesday, May 21, 2014; Time: 7:00:00 AM
 - End Date: Thursday, May 22, 2014; Time: 11:00:00 AM
 - Trip #: FG 5/21/2014
 - Status: Incomplete
 - Min. No.: 0; Max. No.: 9
 - More Info
 - Passport Required? ☐
 - Waiver Required? ☒
 - Parent Trip ID
- Staff:**

Staff Member	Role
Chris Brame	Instructor

Buttons: Add, Remove
- Notes:**
 - Will print on Invoice
 - Will NOT print on Invoice
- Buttons:** Recurrence, New, Save, Close

Destination	Select the Destination from the pop up list box. If the Destination you need is not listed, click the New Destination button in the pop up list box and add a new Destination.
Start Date	Set the Start and the End Date and Time for the trip.
Time	
End Date	

Time	
Trip #	The Trip # will <i>Default</i> based on the parameters you defined when Setting Trip Options (See Section 4.3.6.Trips Options).
Status	<p>The default Status is Incomplete, which you should not change during the trip creation process.</p> <p>When the trip is finished, you will change the Status to Complete.</p> <p>Trips may also be Cancelled, for example if you do not have enough Customers registered to run the trip.</p>
Min No.	The Minimum # and the Maximum # will default based on the parameters you defined in Destinations (See Section 4.4.13.Destinations). When selling places on the trip, EVE will prompt you if the maximum # is exceeded.
Max No.	
More Info	If you use EVE OnLine (the companion product to EVE that lets you sell your products, courses and trips on-line) you can put an email address in the More Info box. Then a link will appear in the Activities widget on your website next to the trip and your customers can click it to send an email to you for more information.
Staff	<p>You can add staff members to the trip staff for this trip by clicking the Add button and selecting them from the pop up list box. Along with the staff member's name, you should pick the Role that they'll play on the trip - e.g. Instructor, etc.</p>  <p>The list of potential roles is taken from the Task Types you have defined that have the "Trip Role" box ticked - see section 4.4.33. You can associate a stock item with each Task Type and then run reports to see how much you need to pay each staff member for the trips they have been on (among other things).</p> <p>To remove staff members, select them and click the Remove button.</p>
Notes: Will print on Invoice	Enter some notes, for example, departure times, etc. These notes will be displayed on the Invoice when the trip is sold.
Notes: Will NOT print on Invoice	Add any internal notes that are pertinent to this trip. These notes will NOT be displayed on the Invoice - they are for internal use only.
Passport Required	If a passport is required for this trip, check the <i>Passport Required checkbox</i> .
Waiver Required	If a waiver is required for this trip, check the <i>Waiver Required checkbox</i> . It is useful to identify the documents required for each Destination when creating new Destinations.

10.1.2 Adding Additional Trip Data

Customers

You will not usually use the Customers tab when setting up a new trip - instead customers will be automatically registered when places on this trip are sold in the Sales Module (See Section 6.1.5.Selling Trips). Having said that, you can click the “Add” button to add customers directly onto the trip. The way the Add button works depends on whether you have ticked the “Show Booking Prompt when Customers Added on Trip form” box on the Trips tab of the Options form - see section 4.3.6. If that box is ticked, EVE will show the Trip Booking Wizard so you can sell a place on the trip to the customer. If the box is not ticked, EVE will simply show the Customer Search form so you can add a customer directly without selling it. Regardless of whether the box is ticked or not, you can click the down arrow button to the right of the Add button. EVE will show the 2 options described above on a popup menu so you can choose how the customer should be added.

Options Purchases

You will not use the Options Purchased tab when setting up a new trip - instead, you will sell a customer a place on the trip and also sell them options associated with the trip (additional material, upgrades, equipment) in the Sales Module. You can use this form to track the specific trip options purchased. This section is used later to review and manage purchases associated with a specific trip and to manage profitability.

Requirements

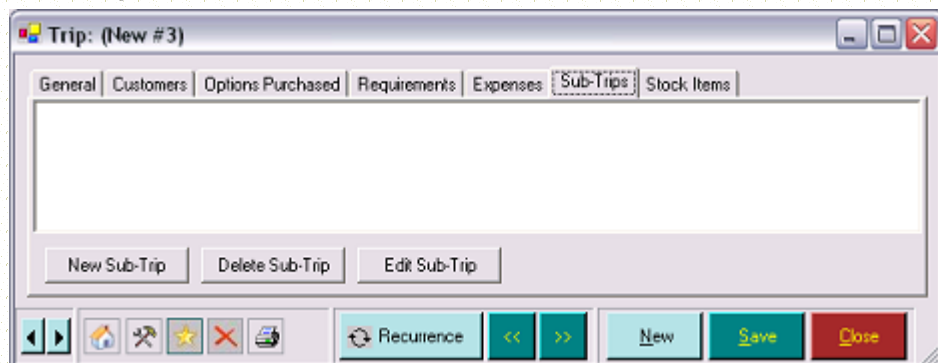
You will not use the Requirements tab when setting up a new trip - instead, you will sell a customer a place on the trip and also identify their gear requirements for the trip in the Sales Module. You can use this form to track the gear each customer requires for a specific trip and use it as a prompt to rent gear or alternatively to assist the customer in making additional gear purchases.

Customer	Masks	Fins	Snorkels	BCDs	Regulators	Wet Suits
Heath Adkins	[Any]	[Any]	[Any]	[Any]	[Any]	[Any]
HAYLEY ADAMS	[Any]	[Any]	[Any]	[Any]	[Any]	[Any]
Hill Abell	[Any]	[Any]	[Any]	[Any]	[Any]	[Any]

Expenses

You will not usually use the expenses tab when setting up a new trip. This section is used later to review and manage expenses associated with a specific trip and to manage profitability.

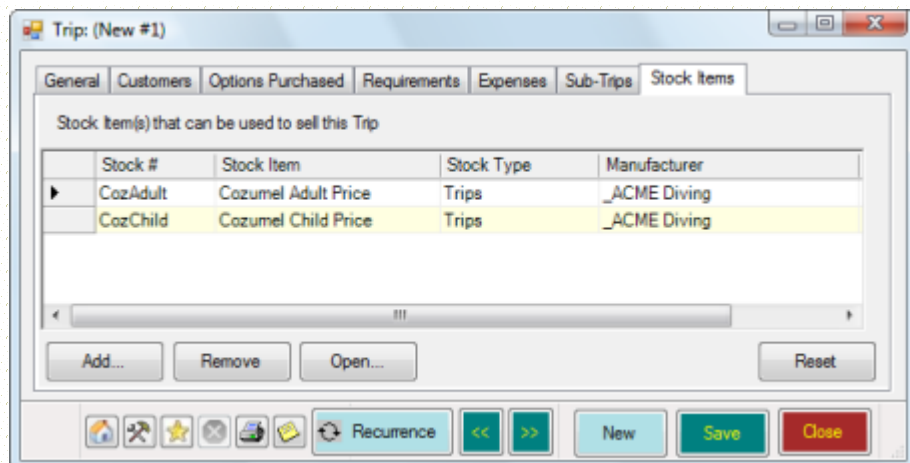
Sub-Trips



You can use the Sub-Trips tab to create a hierarchy among your trips. This is useful, for example, when you are offering a Vacation that has a number of individual trips built into it. For example, you may offer a week long dive trip to Cancun. Within that vacation, you may have a two-day sub-trip to the Caves and another day sub-trip to Cozumel. You can use the sub-trip tab to identify the hierarchy among the trips.

Click the **New Sub-trip** button to add a new sub-trip. Highlight a trip and click the **Delete Sub-Trip** button to remove the trip from the list. If you want to review or edit the trip details, click the **Edit Sub-Trip** button.

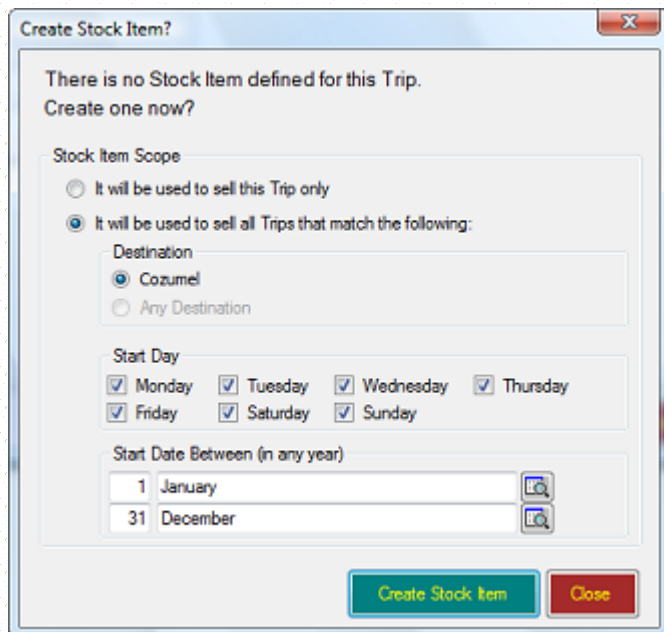
Stock Items



The Stock Items tab lists any Stock Items that may be used to sell places on the trip. For instance, you could create one stock item for Adult Price and another for Child Price. You must have at least one stock item listed here or you can't sell places on the trip.

Note: you can set up Stock Item 'Rules' for Trips - see Stock Item Links on page 163. Whenever a new Trip is saved (or if you click on the Stock Items tab before saving), EVE runs all stock item rules to determine if any stock items can/should be automatically linked to the trip. E.g. you could have a Stock Item called 'Cozumel Adult Price' and set up the rules so that whenever a new Cozumel Trip is created the 'Cozumel Adult Price' is automatically linked to it. This is only appropriate if you run trips to Cozumel frequently for the same price. If the trip is a 'one-off' there is no need to create stock item rules - just create a regular stock item and link it to the trip.

If you save the new Trip and there are no stock items linked to it, EVE shows a prompt asking if you want to create a stock item.



Create Stock Item?

There is no Stock Item defined for this Trip.
Create one now?

Stock Item Scope

☐ It will be used to sell this Trip only

☒ It will be used to sell all Trips that match the following:

Destination

☒ Cozumel

☐ Any Destination

Start Day

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday
☒ Friday ☒ Saturday ☒ Sunday

Start Date Between (in any year)

1 January 31 December

Create Stock Item **Close**

If the trip is a 'one-off', choose the 'It will be used to sell this Trip only' option.

If you will run multiple trips to the same destination at the same price, choose the 'It will be used to sell all Trips that match the following' option and then choose the appropriate options in the lower half of the form.

10.2Day Trip / Charter

Select the Trips Module in the Hierarchy or from the Module buttons. Select New Day Trip (as opposed to New Vacation Trip) from the Button Bar at the top of the form. The New Day Trip entry form will become active. The trips that you set up here will be available when you are Selling Trips (See Section 6.1.5.Selling Trips).

10.2.1 Creating a New Day Trip/Charter

General

Use the General tab to enter the basic information about your vacation trip.

Day Trip: GS 5/22/2014

General Customers Options Purchased Requirements Expenses Sub-Trips Stock Items Seat Planner

ID 51

Boat Giant Stride

Destination Big Reef

Start Date* Thursday, May 22, 2014

Time 8:00:00 AM

End Date* Thursday, May 22, 2014

Time 1:30:00 PM

Arrive 15 minutes before Departure

Trip #* GS 5/22/2014

Status* Incomplete

Meeting Point Main Jetty

More Info info@acomediving.com

Min. No.* 3 Max. No.* 6

Parent Trip ID

Waiver Required? ☐

Passport Required? ☐

Staff

Staff Member	Role
Brian Akers	Boat Captain
Dan Daniels	Dive Master

Add Remove

Notes

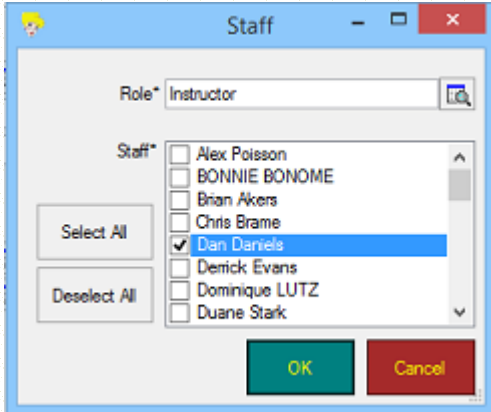
Will print on Invoice

Will NOT print on Invoice

Created 5/22/2014 4:14:22 PM
Last Updated 5/22/2014 4:14:22 PM

Recurrence New Save Close

Boat	Select the Boat from the pop up list box. If the Boat you need is not listed, click the New Boat button in the pop up list box and add a new Boat.
Destination	Select the Destination from the pop up list box. If the Destination you need is not listed, click the New Destination button in the pop up list box and add a new Destination.
Start Date	Set the Start and the End Date and Time for the trip.
Time	
End Date	
Time	
Arrive __ Minutes before Departure	Use this field to identify how early you want customers to arrive at the boat. For example, you may want the customers to arrive at the dock, 45 minutes prior to the boat departure to allow for registration, waiver signing and gear set up.
Trip #	The Trip # will <i>Default</i> based on the parameters you defined when Setting Trip Options (See Section 4.3.6.Trips Options).
Status	The default Status is Incomplete, which you should not change during the trip creation process. When the trip is finished, you will change the Status to Complete. Trips may also be Cancelled, for example if you do not have enough Customers registered to run the trip.
Meeting Point	Enter a description of the meeting point for customers.
More Info	If you use EVE OnLine (the companion product to EVE that lets you sell your products, courses and trips on-line) you can put an email address in the More

	Info box. Then a link will appear in the Activities widget on your website next to the trip and your customers can click it to send an email to you for more information.
Min No.	The Minimum # and the Maximum # will default based on the parameters you defined in Boats (See Section 4.4.1.Boats). If no boat is specified, the values will default based on the parameters you defined in Destinations (See Section 4.4.13.Destinations). When selling places on the trip, EVE will prompt you if the maximum # is exceeded.
Max No.	
Staff	<p>You can add staff members to the day-trip by clicking the Add button and selecting them from the pop up list box. Along with the staff member's name, you should pick the Role that they'll play on the trip - e.g. Boat Caption, Instructor, etc.</p>  <p>The list of potential roles is taken from the Task Types you have defined that have the "Trip Role" box ticked - see section 4.4.33. You can associate a stock item with each Task Type and then run reports to see how much you need to pay each staff member for the trips they have been on (among other things).</p> <p>To remove staff members, select them and click the Remove button.</p>
Notes	Enter some notes, for example, departure times, etc. The three notepad symbols by the side of the notes box can be configured to hold standard text that you need to add to multiple trips. For example, you could define some text that lists important information customers need to know about all trips. To add the standard text to the new trip, click on the notepad symbol - the text will be copied to the notes text box. To define the standard text, right click on the notepad. A prompt pops up so you can enter the text.
Passport Required	If a passport is required for this trip, check the <i>Passport Required checkbox</i> .
Waiver Required	If a waiver is required for this trip, check the <i>Waiver Required checkbox</i> . It is useful to identify the documents required for each Destination when creating new Destinations.

10.2.2 Adding Additional Day Trip/Charter Data

Customers

You will not use the Customers tab when setting up a new trip - instead customers will be automatically registered when places on this trip are sold in the Sales Module (See Section 6.1.5.Selling Trips). You can use this form to review all of the customers registered in this trip.

You will not usually use the Customers tab when setting up a new day-trip - instead customers will be automatically registered when places on this day-trip are sold in the Sales Module (See Section 6.1.5.Selling Trips). Having said that, you can click the “Add” button to add customers directly onto the day-trip. The way the Add button works depends on whether you have ticked the “Show Booking Prompt when Customers Added on Trip form” box on the Trips tab of the Options form - see section 4.3.6. If that box is ticked, EVE will show the Trip Booking Wizard so you can sell a place on the day-trip to the customer. If the box is not ticked, EVE will simply show the Customer Search form so you can add a customer directly without selling it. Regardless of whether the box is ticked or not, you can click the down arrow button to the right of the Add button. EVE will show the 2 options described above on a popup menu so you can choose how the customer should be added.

Options Purchases

You will not use the Options Purchased tab when setting up a new trip - instead, you will sell a customer a place on the trip and also sell them options associated with the trip (additional material, upgrades, equipment) in the Sales Module. You can use this form to track the specific trip options purchased. This section is used later to review and manage purchases associated with a specific trip and to manage profitability.

Requirements

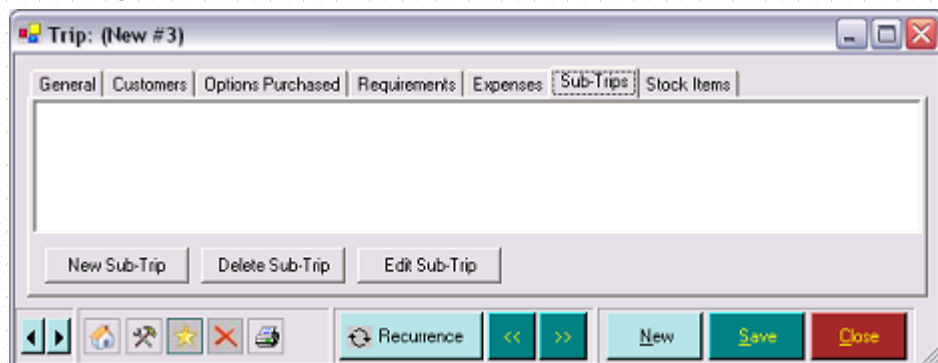
You will not use the Requirements tab when setting up a new trip - instead, you will sell a customer a place on the trip and also identify their gear requirements for the trip in the Sales Module. You can use this form to track the gear each customer requires for a specific trip and use it as a prompt to rent gear or alternatively to assist the customer in making additional gear purchases.

Customer	Masks	Fins	Snorkels	BCDs	Regulators	Wet Suits
Heath Adkins	[Any]	[Any]	[Any]	[Any]	[Any]	[Any]
HAYLEY ADAMS	L/XL	S 5-6	[Any]	XS/S	S/M	Small
Hill Abell	XSM	M 6-7	[Any]	10-14	8-12	Medium
		L 10-11		M/L		Large
						Extra Large

Expenses

You will not usually see the Expenses tab when setting up a new trip. This section is used later to review and manage expenses associated with a specific trip and to manage profitability.

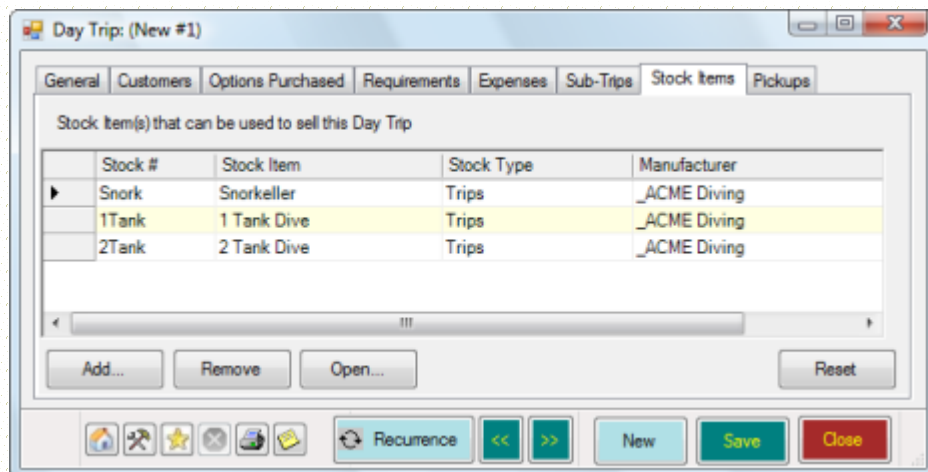
Sub-Trips



You can use the Sub-Trips tab to create a hierarchy among your trips. This is useful, for example, when you are offering a Day Trip with individual trips built into it. For example, you may offer a day trip to Molokai Island. Within that trip, you may offer a single dive in the Cathedral. You can use the Sub-Trip tab to identify the hierarchy among the trips.

Click the **New Sub-trip** button to add a new sub-trip. Highlight a trip and click the **Delete Sub-Trip** button to remove the trip from the list. If you want to review or edit the trip details, click the **Edit Sub-Trip** button.

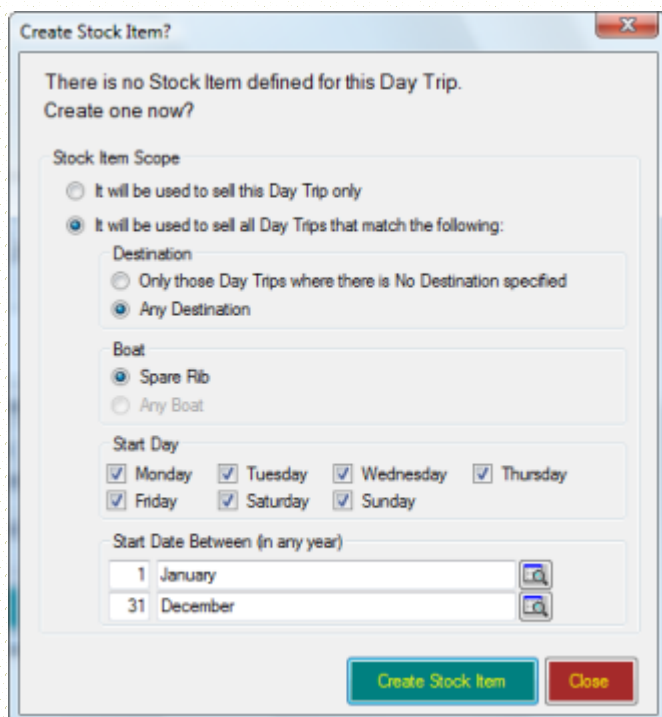
Stock Items



The Stock Items tab lists any Stock Items that can be used to sell places on the Day Trip. For instance, you could create stock items for 2 Tank Dive, 1 Tank Dive, Snorkeller, etc. You must have at least one stock item listed here or you can't sell places on the Day Trip.

Note: you can set up Stock Item 'Rules' for Day Trip - see Stock Item Links on page 163. Whenever a new Day Trip is saved (or if you click on the Stock Items tab before saving), EVE runs all stock item rules to determine if any stock items can/should be automatically linked to the Day Trip. E.g. you could have a Stock Item called '2 Tank Dive' and set up the rules so that whenever a new Day Trip is created for the Sun-Surfer dive boat the '2 Tank Dive' item is automatically linked to it.

If you save the new Trip and there are no stock items linked to it, EVE shows a prompt asking if you want to create a stock item.



Create Stock Item?

There is no Stock Item defined for this Day Trip.
Create one now?

Stock Item Scope

☐ It will be used to sell this Day Trip only

☒ It will be used to sell all Day Trips that match the following:

Destination

☐ Only those Day Trips where there is No Destination specified

☒ Any Destination

Boat

☒ Spare Rib

☐ Any Boat

Start Day

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday

☒ Friday ☒ Saturday ☒ Sunday

Start Date Between (in any year)

1 January

31 December

Create Stock Item **Close**

If the Day Trip is a 'one-off' (unlikely since you probably run day trips at the same price every day), choose the 'It will be used to sell this Day Trip only' option.

If you will run multiple day trips to the same destination/on the same boat at the same price, choose the 'It will be used to sell all Day Trips that match the following' option and then choose the appropriate options in the lower half of the form.

Pick Ups

You will not use the Pick Ups tab when setting up a new trip - instead customers will be automatically listed when places on this trip are sold in the Sales Module. You can use this form to indicate which customers need a pick up and which vehicle you will use to organize transportation.

10.3 Recurring Trips

You may run trips on a regular basis and find that you can use one trip that exactly or closely matches your ongoing needs to create a recurring trip and speed up your data entry. For example, you may offer a week in Mexico every March or a daily boat trip on one of your resort's boats. The process for setting up a recurring trip is the same for Vacation Trips and for Day Trips.

Recurrence

The screenshot shows the 'Trip: Wind 29/04/2006' form with the 'Recurrence' dialog box open. The 'Recurrence' dialog has tabs for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Daily' tab is selected, showing options for 'Every 1 day(s)', 'Every Week Day', and 'Every Week End Day'. The 'Starting On' and 'Ending On' dates are both set to 'April 26, 2006'. The 'OK' and 'Cancel' buttons are at the bottom right of the dialog.

Once you have set up a trip that closely or exactly matches your ongoing needs, click the **Recurrence** button to generate multiple trips. You can create a recurring trip on a Daily, Weekly, Monthly or Yearly basis. Select the option that most closely matches your recurrence; select a Starting On and Ending On date. The trip and all of the data you have attached to it will be duplicated using the dates you defined.

When you click **OK**, a summary page will be displayed that shows a Calendar view of the trips that will be created. Confirm the dates look as you intended before continuing.

10.4 Customer Registration

Generally, you will register a customer on a trip by Selling Trips (See Section 6.1.5. Selling Trips) to them in the Sales Module. During the sales process EVE prompts you to select the specific trip that the customer wants to register on, you can collect a deposit or full trip payment and the customer is automatically registered.

Customers

You can manually add a customer to a trip directly on the Trips form by accessing the Customers tab.



The screenshot shows the 'Trip: Wind 29/04/2006' form with the 'Customers' tab selected. The 'Customers' tab displays a table with the following data:

Customer	Date Confirmed	Enrollment Status	Tel (H)	Tel (W)	Tel (M)	Email	Trip Price (Pre T)	Trip Tax	Trip Total	Paid (Pre Tax)	Paid (T)
SUSAN VACCARO		Enrolled	2063966454			SUSAN@yahoo.com	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
KEN BABCOCK		Enrolled	9643828639			KEN@yahoo.com	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

At the bottom of the form, there are buttons for 'Add', 'Remove', and 'Edit Customer(s)'. The 'Places Taken' counter shows '2'.

Use the **Add button** to bring up the Customer Search box and add a customer to the trip. Select a customer in the grid and click **Remove button** to remove him/her from the trip. If you need to edit customer details, highlight the customer and click the **Edit Customer(s) button** to bring up the Customer file.

The following information about the customer is displayed.

Customer	The Customer name is displayed. This field is not editable.
Date Confirmed	You can enter the Date you confirmed the trip with the customer. Click the F8 key on your keyboard to enter the current date and time.
Enrollment Status	Select or change the Enrolment Status of the customer from the pop up list box.
Tel (H)	Phone and email details for the customer are displayed.
Tel (W)	Click the  Email button to send an email to the selected customer(s).
Tel (M)	Click the  SMS button to send an SMS text message to the selected customer(s).
Email	
Trip Price	Details about the trip price and amounts paid/owing by the customer are displayed (pre and post tax). The trip price includes any options that have been packaged together with the trip in Stock Items.
Trip Tax	
Trip Total	
Paid (Pre-Tax)	
Paid (Tax)	
Total Paid	
Amount Owed	
Deposit Paid	
Special Arrangements	Enter a free text description of arrangements relating to the selected customer. Here you could enter, for example, the customer's hotel name and address, flight times, etc.

Requirements

Customers may have specific gear requirements for a vacation or a day trip. Use the Requirements tab to keep track of which item(s) are required by which customer. The Requirements tab here shows the same information as that entered in the Sales Module if you used the Requirements tab when registering the customer on the trip (See Section 10.4.Customer Registration).

A list is shown of all Stock Types that have the Trip Requirement option checked. You can enter free text or click on a specific size or [Any] size item. In the text box, for instance, you could enter the quantity of those items the customer will need or you could enter reference number(s).

Pick-Ups

If you provide pickups for your customers, you can choose between 2 ways of tracking them in EVE.

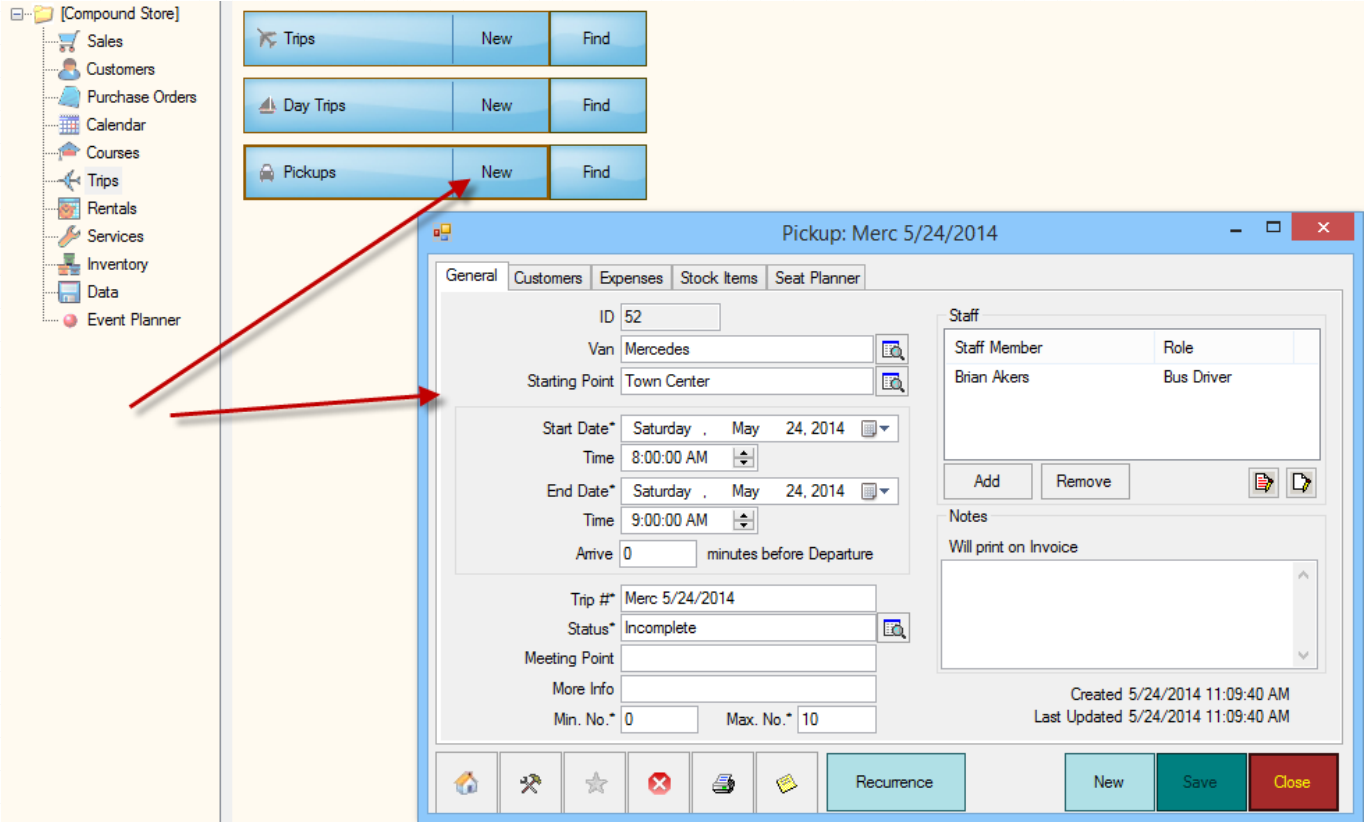
Option 1. On the Trips tab of the Options form, put a tick in the *Use "Classic" Style Pickups* box. Then, on the Pick Ups tab of the Day-Trips form you can identify the specific pick up and transportation arrangements required by each customer. You can later look at each Van/Bus to review the pick-up arrangements by vehicle by date.

Customer	Pickup Required?	Van	Pickup Location	Pickup Time
William Haake	<input checked="" type="checkbox"/>	Mercedes	Hilton	08:00
Scott jackman	<input checked="" type="checkbox"/>	Mercedes	Hilton	08:00
Toby Faber	<input checked="" type="checkbox"/>	Honda	Best Western	07:30

Customer	The name of each customer registered on the trip is displayed.
Pick Up Required	Check the Pick Up Required check box to indicate that the customer requires transportation.
Van	Choose a Van/Bus from the pop up list box. If the Van/Bus you require is not displayed, you can add another Van using the Add Van button on the pop up list box.
Pick Up Location	Choose a Hotel from the pop up list box.

	If the Hotel you require is not displayed, you can add another Hotel using the Add Hotel button.
Pick Up Time	Enter the time of the pick up.

Option 2. On the Trips tab of the Options form, remove the tick from the Use “Classic” Style Pickups box. Now you can create Pickup records to keep track of the pickup information. Pickup records are much like Day-Trips in that you can create a pickup, assign a driver and other staff (if appropriate) and then add customers to the pickup. If you don’t see the Pickups button in your Button Array, you can add it by modifying your User Interface (see section 4.4.34). Pickups are most useful if you run multiple vans/buses and especially if you use EVE’s Event Planner feature that lets you drag and drop customers onto Trips/Day-Trips and Courses. You can quickly drag customers from the day-trip they’re already registered on to the appropriate Pickup. See section 10.6



10.5Trip Expenses and Profits

Tracking trip profits and expenses is critical to ensuring your travel department is run as a profitable profit center. Trip costs and expenses can be found on three key screens.

10.5.1 Tracking Revenue

Customers

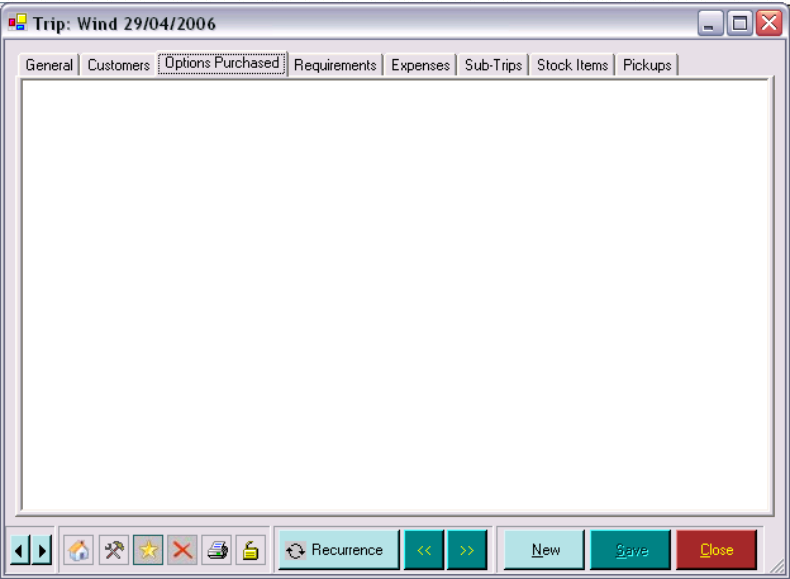
You can track the amount that customer’s have paid for the trip on the Customers tab.

Trip Price	Details about the trip price and amounts paid/owing by the customer are displayed (pre and post tax). The trip price includes any options that have been packaged together with the trip in Stock Items.
Trip Tax	
Trip Total	

Paid (Pre-Tax)	
Paid (Tax)	
Total Paid	
Amount Owed	
Deposit Paid	

Options Purchased

You can track the amount of trip costs spent on options purchased. These are items that were packaged together with the trip in Stock Items. When Selling Trips (See Section 6.1.5.Selling Trips) you will be able to sell the options.



Customer	Each of the customers on the trip is displayed.
Options	Each of the options packaged with the trip stock item is displayed. The amount paid for the option (pre tax) is displayed.

10.5.2 Tracking Expenses

Expenses

You can enter expenses associated with the trip on the Expenses tab.

When you Add an expense item, you will select a Stock Item to add.

Item	The description of the Stock item is displayed.
Amount	<p>Enter the Amount of the item. This may be the cost price if you removed this item from inventory or another amount if you purchased the item outside of your establishment.</p> <p>Note: Entering a stock item as an expense does NOT decrement the item in your inventory / stock amounts. If you want to remove the item from inventory, you must send the Expenses to an Invoice.</p> <p>Amounts are sub-totaled and displayed at the bottom of the form.</p>
Tax	<p>The Tax is calculated based on the tax band associated with the Stock Item.</p> <p>Tax is sub-totaled and displayed at the bottom of the form.</p>
Total	<p>The Total is based on the amount plus the tax. If you prefer, you can enter the Total and EVE will calculate the amount.</p> <p>A grand Total is displayed at the bottom of the form.</p>
Tax Band	The Tax Band associated with the item is displayed.
Tax Rate	The Tax Rate associated with the tax band is displayed.
Expenses Date	Enter the Date the expense was incurred.
Employee	<p>If you selected <i>Default Employee on New Records</i> when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted.</p> <p>Choose the employee completing this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Notes	Enter any Notes associated with this expense.

Invoice #	Once you have identified all of the Expenses on the trip, you can send them to an invoice. To do this first select those expenses in the grid that you want to send. Then right click on the selected area and click Send To then New Invoice . A new Invoice will be created with an Expenses Invoice Type. Once you have saved the invoice, inventory levels will be updated (if appropriate) and the Invoice number will be shown in the Invoice # column in the Expenses grid.
Created	The Date this expense line was created is displayed.
Last Updated	The Date the last time this expense line was edited is displayed.

10.6 Event Planner

The Event Planner is a helpful tool to quickly sell places on courses, trips and pickups, assign seats to customers and to move customers from one course or trip or pickup to another. Note: the Event Planner will only let you work with Pickups if you have removed the tick from the "Use 'Classic' style pickups" box on the Trips tab of the Options form - see section 4.3.6

To access the Event Planner, select Event Planner from the **View** menu on the main screen or click the Event Planner button on the top toolbar or right click on a day in the Calendar that contains a trip or course and then click **Event Planner** or click **Event Planner** in the Hierarchy window on the main EVE form. The form will open showing courses and/or trips and/or pickups scheduled for the date shown at the bottom left.

In the above example two Day-Trips are scheduled for the 7th March. 7 customers are already registered on the Beamer trip (3 signed up for the 2 tank dive, 2 for the 1 tank dive and 2 for snorkeling) and 3 customers are already registered on the Thrust trip. On the right hand side is a list of customers that are currently in the

'resort' - i.e. that have a Resort Reservation on the 7th March. You can select one or more customers in that list and drag them onto the 'activity' (e.g. Snorkellers) that they want to purchase on the trip.

Each of the 'activities' shown on the trip is a Stock Item. EVE will display all the stock items that you have linked to the trip as a colored box that customers can be drag-dropped onto. When you drop a customer onto an activity EVE will open the standard Booking Wizard (see section 6.1.4 and 6.1.5) so you can define options for the booking - e.g. assign trip requirements, sell add-ons, etc. Alternatively, you can configure EVE using the Settings button (see below) so the Booking Wizard is not shown. In this case, the Booking Wizard is opened 'invisibly' and EVE chooses the default settings from each page of the Wizard. This is very powerful as all add-ons, requirements, etc. will be added in the background while the booking happens quickly and easily.

You can click on the down arrow on any activity box to show the customers that signed up for that activity and, you can click on the down arrow on one of those customers to show contact details of that customer.

Beamer 07 Mar 8:40 AM
7 of 23 places taken. 16 place(s) available
Staff: David Armstrong

2 Tank Dive x3
[Drag Customer Here to Add]

1 Tank Dive x2
[Drag Customer Here to Add]

Snorkellers x2
[Drag Customer Here to Add]

Beamer 07 Mar 8:40 AM
7 of 23 places taken. 16 place(s) available
Staff: David Armstrong

2 Tank Dive x3
[Drag Customer Here to Add]

Karin Kalisvaart

Remco Kalee

Janet Kalberer

1 Tank Dive x2
[Drag Customer Here to Add]

Snorkellers x2
[Drag Customer Here to Add]

Beamer 07 Mar 8:40 AM
7 of 23 places taken. 16 place(s) available
Staff: David Armstrong

2 Tank Dive x3
[Drag Customer Here to Add]

Karin Kalisvaart

Remco Kalee

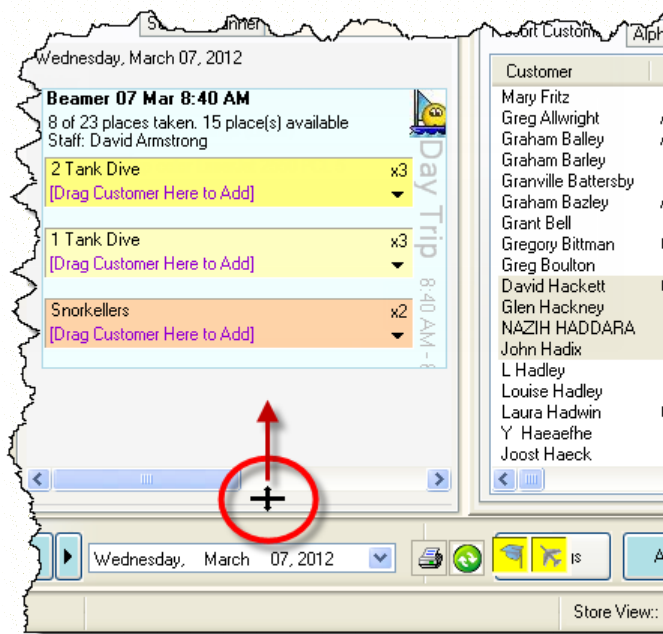
Janet Kalberer

1 Tank Dive x2
[Drag Customer Here to Add]

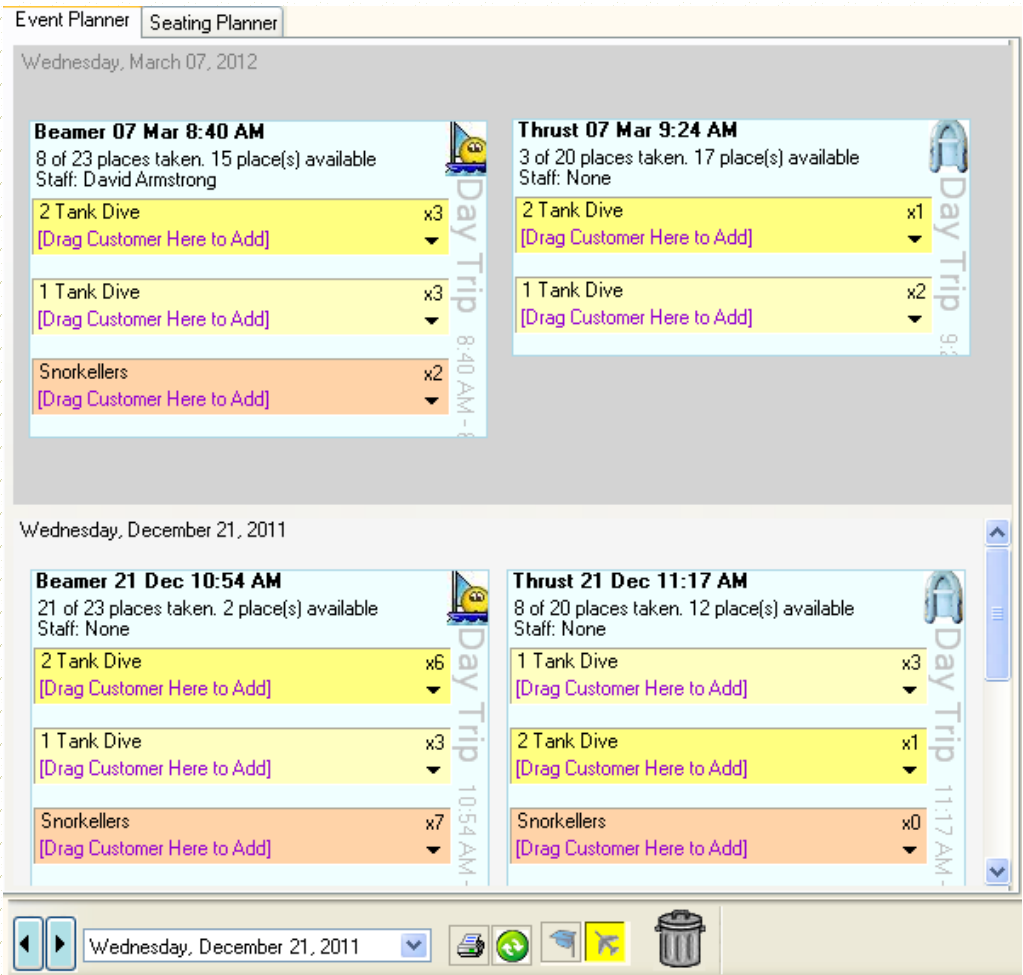
Snorkellers x2
[Drag Customer Here to Add]

remco.kalee@gmail.com
M: 345 678 9012
H: 123 456 7890
REMCO Road
Chatahoochee
13134
NETHERLANDS


Sometimes it may be useful to show the events of more than one day in the planner. This could be useful, for instance, so you can view the customers of the trip from yesterday and drag them onto tomorrow's trip. To view more than one day, use your mouse to drag the planner upwards from just above the bottom status bar.




The planner will show 2 days split horizontally - see screenshot below. Click on the background of either split to make it active (the active split is shown in light gray and the inactive split in dark gray) and then use the date section at the bottom to change the date of that split.



By default, when you drag a customer from one trip to another, the customer will be moved between trips.

During the drag process, the cursor will appear like this that indicates a Move operation is taking place: 

Sometimes you may want to Copy customers from one trip to another. To do this, hold down the Ctrl key on your keyboard while you drag. The cursor will now show a + symbol on the bottom to indicate a Copy operation

is being performed. 

The cursor will always show the + symbol when you drag from the customer list on the right since in that case a Move makes no sense - the customer is always Copied onto the trip.

Drag customer(s) from a course or trip or pickup onto the Trash can icon at the bottom to remove them from the course/trip.

Right click on an Activity to show a popup menu with the following options:

Open Stock Item	Open the Stock Item record
Change ForeColor	Change the color of the displayed Text. This will change the text color whenever the stock item is displayed in the Event Planner (i.e. on all

	courses/trips/pickups)
Change BackColor	Change the color of the background. This will change the background color whenever the stock item is displayed in the Event Planner (i.e. on all courses/trips/pickups)
Select All	Highlight all of the customers enrolled on the activity. This may be useful so you can print all of those customers' invoices or to make an add-on sale to all of them.
Deselect All	De-highlight all of the customers enrolled on the activity
Paste	If you have copied customers from elsewhere - e.g. from another course, trip or pickup or from the Customer Search form, you can paste them onto the course/trip

Right click on a Customer to show a popup menu with the following options:

Open Customer(s)	If no customers are selected, this will open the customer record of the customer you right clicked on. If multiple customers are selected, this will open the customer records of all them.
Open Ongoing Invoice(s)	If no customers are selected, this will open the Ongoing Invoice(s) of the customer you right clicked on. If multiple customers are selected, this will open the Ongoing Invoice(s) of them all.
Print Ongoing Invoice(s)	If no customers are selected, this will print the Ongoing Invoice(s) of the customer you right clicked on. If multiple customers are selected, this will print the Ongoing Invoice(s) of them all. You could use this when the boat captain has called the store to let you know the boat will arrive back at the dock shortly so you have all invoices printed out ready.
Merge Ongoing Invoice(s)	The will merge the ongoing invoices of the selected customers. You could use this, e.g. if a family were booked on a trip and each one had their own Ongoing Invoice to handle their purchases. At payment time you could merge them on so a parent can pay for everyone.

Right click on the background of the Planner to show a popup menu with the following options:

Add Course	Click this to show the Course/Trip/DayTrip Search form so you can add one of those to the planner. You could do this if you wanted to drag and drop customers from a Course/Trip/DayTrip scheduled on a different day.
Add Trip	
Add Day Trip	
Add Group	Click this to show the Group Search form so you can find a Group to add to the planner. You could then drag and drop multiple members of the group onto a Course/Trip/DayTrip
Paste	If you had already copied a Course/Trip/DayTrip onto the clipboard - e.g. from the Calendar or from a Search form, you could paste them onto the planner.
Refresh	Reload the day's events. If you're running in a store with multiple computers doing bookings you'll need to Refresh regularly so you can see changes made on other PCs.

Click on the Seating Planner tab at the top to change the way that courses and trips and pickups are displayed in the planner.

You'll see each course, trip and pickup displayed with a number of seats that matches the Maximum number of places you set on the course/trip/pickup. On day-trips, if you have assigned a graphic to the boat in question (see section 4.4.1) then the graphic will be displayed on the day-trip. In Seating Planner view, you can assign seats to each customer by dragging and dropping them. If you drag a customer from one seat to another on the course/trip/pickup, all that will happen is their seat number will be reassigned. If you drag a customer from the customer list on the right onto a seat, the customer will be enrolled and assigned the seat. Whether an item is added to an invoice as well depends on the option you have chosen on the Settings form - see later in this section.

Pan Aqua Diving

User Interface
Advanced Data Entry UI

Event Planner Seating Planner

Wednesday, March 07, 2012

Beamer 07 Mar 8:40 AM

Captain: --Unassigned--

Boarding Step Equipment Storage

22 --Unassigned-- 21

20 --Unassigned-- 19

18 --Unassigned-- 17

16 --Unassigned-- 15

14 --Unassigned-- 13

12 --Unassigned-- 11

10 --Unassigned-- 09

08 --Unassigned-- Amanda Walker 07

06 Hannah Walgate Ian Wadland 05

04 Simon Wades Janet Kalberer 03

02 Remco Kalee Karin Kalisvaart 01

Stern

Resort Customers Alphabetical Course Customers

Customer	Cert. Level	No. of Dives
Mary Fritz		34
Greg Allwright	Advanced ...	254
Graham Bailey	Advanced ...	143
Graham Barley		20
Granville Battersby		
Graham Bazley	Advanced ...	54
Grant Bell		3
Gregory Bittman	Openwater ...	27
Greg Boulton		22
David Hackett	Openwater ...	
Glen Hackney		
NAZIH HADDARA		16
John Hadix		
L Hadley		
Louise Hadley		165
Laura Hadwin	Openwater ...	
Y Haeaehe		144
Joost Haec		
Jeffrey Kainz		
Andreas Kaiser		
David Kalberer		
Janet Kalberer		
Remco Kalee		
Karin Kalisvaart		
Leo Kalisvaart		
Hanny Kalk		
Ronald Kalk		
Gisela Kalkstein		
Simon Wade		0
Simon Wades		0
Ian Wadland		0

Wednesday, March 07, 2012

Store View:: [Compound Store]

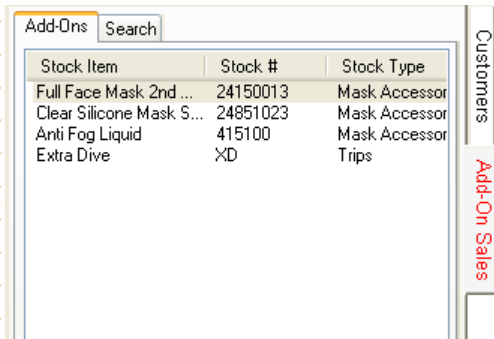
The Customers section on the right hand side has a number of tabs. Each tab lists people that can be drag-dropped onto a course/trip/pickup. You can configure EVE so that only one person can be dragged at a time or so that multiple people can be dragged at once - change that option on the General tab of the Settings form - see below.

Resort Customers

This lists all customers in the resort on the date showing at the bottom left of the Planner - i.e. those people that have a Resort Reservation covering that

	day.
Alphabetical	This lists all customers in the database alphabetically. You can choose to list them alphabetically by First Name or Last Name using the option buttons above the list. Click on one of the buttons to the left of the list that is marked with a letter to show customers whose FirstName/LastName starts with that letter.
Activity Customers	The lists all customers who are enrolled on a course or trip on the date shown. This makes it easy to drag customers onto trips on the boat for their open water components or to drag customers onto a pickup from the trip on which they're registered.
Search	Using the Search tab you can search on First Name or Last Name for customers to show.
Staff	This lists all staff at the store. You can use this tab to assign crew members to a trip.

On the far right of the Customers section are 2 vertically aligned tabs called Customers and Add-On Sales. If you click on Add-On Sales you'll see 2 more tabs at the top called Add-Ons and Search. You can use these to find stock items that you might want to sell to customers while they're on the trip or course. You can drag stock items from the list onto the appropriate customer(s). EVE will add those items to the customers' Ongoing Invoices.



Settings

Click the Settings button at the bottom of the Planner to show the form in the screenshot below. You can use this to define how the Planner works.

10.6.1.1.1 General Tab

The screenshot shows a 'Settings' window with the following configuration:

- General Tab:**
 - Items to Show:** ☐ Courses, ☒ Trips, ☐ Pickups
 - Color Coding:** ☒ By Gender, ☐ By Activity Type, ☐ By Group, ☐ None
 - Default Planner tab:** ☒ Event Planner, ☐ Seating Planner
 - Default Customer tab:** ☐ Resort, ☐ Alphabetical, ☐ Activity Customers, ☒ Search
 - ☐ Allow Multi-Select on Customer list
 - ☐ Allow Multi-Select on Stock Item list
 - Invoice Type:** Ongoing Invoice

Items to Show	Put a tick in Courses and/or Trips or Pickups to indicate which types of event you want to be automatically displayed when you load the planner. All courses and/or trips and/or pickups on the date specified at the bottom of the planner will be shown. The Pickups option will only be present if you have removed the tick from the "Use 'Classic' style pickups" option on the Trips tab of the Options form - see section 4.3.6
Default Planner tab	Indicate whether you want the Event Planner or the Seating Planner to be shown when you first view the planner. You can switch between the views at any time.
Color Coding	Indicate how you want each customer box to be colored. If you choose 'By Gender', male customers will be shown in blue and female in pink. If you choose 'By Activity Type', each customer will be colored the same as the activity they enrolled on. You can change that color by right clicking on the activity on a course or trip and clicking Change ForeColor and/or Change BackColor. If you choose 'By Group', each customer that is a member of a Group will be shown in the color specified in the Calendar Colors section on the Group.
Default Customer tab	Indicate which Customer tab you want to be the active one when the planner is shown. Choose from Resort, Activity Customers, Alphabetical and Search.
Allow Multi-Select on Customer list	Put a tick in the box if you want to be able to select multiple customers in the Customers section. This may be useful so you can select e.g. 5 customers and drag them all together onto a course or trip. You can select multiple customers by holding down the Ctrl or Shift key while you left click with your mouse. Note: when dragging multiple customers, you must drag from a customer name, not from white space next to the customer in the list. Leave the box unticked if you want single-selection on the customer list.
Allow Multi-Select on Stock Item list	Put a tick in the box if you want to be able to select multiple stock items in the Add-Ons section. This may be useful so you can select e.g. 5 stock items and drag them all together onto a customer. You can select multiple stock items by holding down the Ctrl or Shift key while you left click with your mouse. Note: when dragging multiple stock items, you must drag from a stock item name, not from white space next to the stock item in the list.

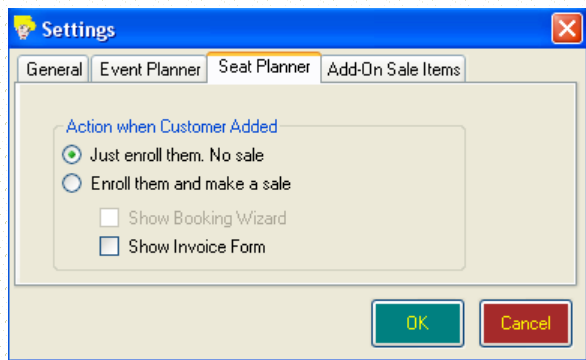
	Leave the box unticked if you want single-selection on the stock item list.
Invoice Type	Choose which type of invoice you want to be created by the planner when you drag a customer onto a course or trip. The default is Ongoing Invoice. This is the best invoice type to use as, if you sell add-ons to the customer, all will be added to the same Ongoing Invoice.

10.6.1.1.2 Event Planner tab

Show Booking Wizard	Put a tick in the box if you want the Booking Wizard to be displayed when you drag a customer onto a course or trip. You can use the Booking Wizard to define options about the booking - such as choosing package items and defining equipment requirements for the customer on the course/trip. Leave the box unticked if you want EVE to keep the Booking Wizard hidden during the booking. In this case EVE will use the default options from the Booking Wizard.
Show Invoice Form	Put a tick in the box if you want the Invoice form to be shown each time you drag a customer onto a course or trip. You might want this to happen if you charge for the trip up-front so you can take the payment. If you charge when then trip is complete (so you can include add-on sales or you are in a resort where the customer pays for everything at the end of their stay) you may want to leave the box unticked. EVE will then add items to the invoice but not show the invoice form each time.
Include 'No Stock Item' items	In some cases you may not want to charge customers when you enroll them on the course or trip. E.g. you may want to enroll course customers onto a boat for their open water dives and the boat trip is included in their course price. In this case, you can either link a Stock Item to the trip called e.g. Course Customers (this will cause a Course Customers activity box to be added to the trip in the planner) and leave the price at zero, or you could put a tick in the "Include 'No Stock Item' items". This latter, will add a colored activity box to the trip called No Stock Item. This will hold all customers who enrolled on the trip without paying.

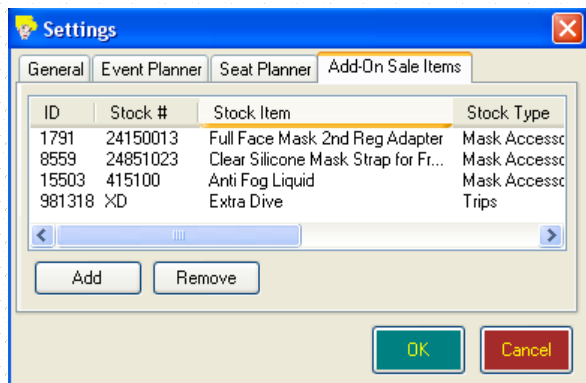
Allow Dragging of Customers to 'No Stock Item'	If the "Include 'No Stock Item' items" box is ticked, you can use the "Allow Dragging of Customers to 'No Stock Item'" box to determine if customers can be dragged onto the No Stock Item box to enroll them at no charge. If not ticked, you can just see who enrolled without paying. If ticked you can enroll people by dragging them onto the activity.
Expand Stock Item lists when Events are loaded	By default, when the planner is loaded, all of the Activity boxes are not expanded - i.e. the customer(s) already enrolled on the activities are not displayed (and you must click on the down arrow on the Activity to show the customers). Put a tick in the box if you want each Activity to be automatically expanded to show its customers when the planner is loaded.
Expand Customer Lists when Events are loaded	If the box above is ticked, you can decide whether you want each customer to be expanded when the planner is loaded to show customer details.
Customer Detail	Choose what information you want to be displayed about each customer on the course/trip. Put a tick in "(Show Certification Level)" to show the current certification level of the customer. Put a tick in <Show Course Enrollments> to show any course(s) the customer is currently enrolled on. Note: enrollments are shown in round brackets () and course enrollments are shown in angled brackets <> to distinguish between the 2 if you have both options turned on. Put a tick in [Show First Language] if you want that to appear.
Documents	Indicate how you want Document(s) (e.g. releases, waivers, etc.) to be handled if any are linked to the stock item that you're enrolling customer(s) on. Choose Auto-Print if you want EVE to automatically print them. Choose Show Prompt if you want EVE to show the standard Printer dialog box each time so you can choose at the time if you want to print the documents or not. Choose Do Nothing if you want EVE to ignore all documents.

10.6.1.1.3 Seat Planner tab



Action when Customer Added	On the Seating Planner (as opposed to the Event Planner), indicate what you want to happen when a customer is dragged onto a Seat.
-----------------------------------	--

10.6.1.1.4 Add-On Sales Items tab



Add-On Sale Items tab

Use the Add-On Sale Items tab to add items that are commonly sold to customers when they're on a course or trip. These will appear on the Add-Ons tab on the planner so you can quickly drag and drop them onto a customer on the planner to sell them the item(s).

11 RENTALS

A large outlay for most dive centers is the purchase of school diving equipment. The Rentals Module allows you to keep track of your investment and reduce the possibility of lost or non-returned items.

Equipment available in the storeroom can be booked for a fixed period to a diver, either for immediate or future use. The selected items are automatically removed from the available list for the period specified. A checklist of items can be printed to ensure all items are collected and returned. Book customer equipment required for each module on a course and copy a previous customers booking to a future date. Any items unavailable for the new date will be highlighted and alternative items suggested.

Busy dive centers may want to add barcodes to individual items so that single swipe bookings can be performed. Details of overdue items can be shown and offenders e-mailed directly from EVE.

For regular customers, a record of their size profiles and any preferred items can be stored. The available grid will only show those items that match the diver's profile. All favorite items can be booked with a single mouse-click.

11.1 Rental Bookings

There are a number of different ways your dive centre may handle the equipment rental process - some book specific items up-front, some take payment up-front and want to indicate types of equipment required but assign specific items later, some don't assign specific items at all. Some of the more common ways of handling rental bookings are described below.

Select the Rentals Module in the Hierarchy or from the Module buttons. Select New Rental Booking from the Button Bar at the top of the form. The New Rental Booking entry form will become active. The bookings that you set up here will be available when you are Selling Rental Bookings.

General



Booking

The booking number is generated by EVE. It will display as (New #XX) where XX is the number of bookings created in this session of EVE until you save the booking at which point EVE will assign a permanent booking number.

Employee

If you selected *Default Employee on New Records* when defining Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted.

	<p>Choose the employee completing this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).</p> <p>If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.</p>
Customer	<p>If you have selected <i>Search by Typing First Name First</i> when you defined Customer Options (See Section 4.3.3.Customers Options), you would enter the customer's first name. Otherwise, enter the customer's last name. As soon as you begin typing, the Customer Search box will open allowing you to filter your data and search more effectively for the customer making the purchase.</p> <p>If this is a new customer making a purchase, click the New button and you will be able to Create a New Customer.</p>
Start Date	<p>Enter the booking start and end dates and times. When the Rental Booking form loads, today's date and time is shown for both the start and end dates.</p> <p>Alternatively, you can click the Start Date and Booking Period buttons on the Cool Bar to set the Start/End Date/Time. From the Cool Bar, you can start bookings Now (used when a customer walks into the dive center to rent gear) or on any date in the next six days. When you select the date from the Cool Bar, the start time will automatically default to the Rental Start Time you identified for the Store (See Section 4.4.32.Stores) within which you are making the booking.</p> <p>From the Cool Bar, you can set the booking period to the End of Day. The end time will be automatically defaulted to the Rental End Time you identified for the Store (See Section 4.4.32.Stores) within which you are making the booking. Alternatively you can select a booking period of 1 through 7, 14, 21 or 28 days and the end time will be based on a 24 hour rental for the number of days selected.</p> <p>Note: EVE does not allow overlapping bookings of the same item of rental equipment. If you attempt to double-book an item EVE asks you whether it should search for an equivalent item (i.e. of the same type and size, and preferably from the same manufacturer).</p>
Start Time	
End Date	
End Time	
Booking period (days)	<p>When dates and/or times are changed, EVE recalculates the booking period to the nearest half-day. You can override EVE's value, either by just typing the number of days, or by clicking on one of the day items on the Cool bar.</p> <p>Whenever the booking period changes, EVE keeps the payment period in step. The payment period is used to calculate the rental cost. You can override EVE's value.</p> <p>You might want to do this, for example, if you rent equipment for the weekend. A customer may rent the equipment from Friday evening to Monday morning but you only want to charge for two days use. In this case override EVE's default value by typing 2 into the payment period box.</p> <p>Note: if you charge for rentals when customers return the equipment based on how long they had it for you can select all items in the grid, right click on the selected area and then click Recalculate Rental Prices.</p>
Payment Period (days)	
Status	EVE defaults the Status to Valid on new rental bookings. You will not usually want to change this.
Bag #	If you track your rental bookings by bag #, enter the Bag # that will contain the booking items here.
Invoice	When you sell this rental booking on an invoice, EVE will automatically link the

	invoice to the rental booking and display the Invoice # here. You can use the  icon to open the related invoice.
Notes	<p>Use Notes to enter any free-text comments that you wish. The Notes are printed onto the invoice. At the top of the Notes text box are 5 icons . You can set these to hold text that you commonly add to a transaction. You can then click on the icon to add the text to the Notes field.</p> <p>To define the text for an icon, right click on it. A prompt is shown so you can enter text up to a maximum of 255 characters. When creating a booking next time, click on the Notes icon and the previously defined text is added to the Notes text box.</p>

11.1.1 Adding Gear to the Dive Bag

Specific Fields

Use the dive bag to add items to the customer's rental. You can enter items using the Bar Code, Ref # or Serial #. For any of these fields, you can search using EVE's field matching capabilities. Use the matching option beside the field to set the match criteria:

- ❖ A* - Match start of field
- ❖ *A - Match end of field
- ❖ A - Match any part of field
- ❖ A - Exact Match

Barcode #	<p>The Barcode # field is used in conjunction with a barcode reader to quickly add Stock Items to the dive bag.</p> <p>Only barcode readers with a keyboard wedge interface are supported. A keyboard wedge interface implies that the barcode reader attaches to the keyboard of your computer and simulates key strokes when a barcode is swiped.</p> <p>To select equipment items within EVE, position the cursor into the Barcode # field (by pressing F9 or by holding down the CTRL key while pressing B or by left clicking in the field and swipe the barcode. EVE searches for the matching Item and adds it to the dive bag.</p> <p>Note: when the barcode is swiped, data is written to whichever field is active. Make the barcode # field active before swiping the barcode to allow the functionality described above to be successful. Most barcode readers can be programmed to send additional characters before and/or after the barcode data. Programming your reader to send an F9 key before the barcode data will automatically set focus to the barcode # field immediately prior to the barcode data being sent.</p> <p>Note: you can use the barcode # field without a barcode reader. Type the barcode number (this is usually displayed beneath the barcode on the label) directly into the barcode # field and press the Enter key.</p>
Ref #	If you know the reference number of the item, type it into the Ref # field and press the Enter key. EVE searches for the matching item and adds it to the dive bag automatically.
Serial #	If you know the serial number of the item, type it into the Serial # field and press the Enter key. EVE searches for the matching item and adds it to the dive bag automatically.

Search for Equipment

If you do not know the bar code #, ref # or serial # of the specific item you are selling, you can search for it using the Equipment search located on the Cool Bar. See Searching for Data for more information. There are a few special comments on Rental Equipment searches below.

Stock Type	On the General Tab, you can identify Stock Type. This pop up list box holds a list of all Stock Types that are marked For Rent (See Section 5.1.6.Stock Types). If you select one, Equipment Items are filtered to show only those items that relate to that Stock Type.
Equipment Owner	On the Detail Tab, you can identify the Equipment Owner. Only those equipment items that have the owner ‘.Rental. .Equipment.’ are displayed. When you add new Equipment items to EVE, EVE automatically assigns this owner for all rental pieces. Do not change this value for rental bookings.
Only Show Rental Items Not Booked	On the Detail Tab, you can choose to show only those items not booked between the rental dates you set on the rental booking. If you uncheck this checkbox, all equipment items, whether they are booked or not, will be displayed. Note: Any Equipment items that have the <i>Bypass Double Booking Check checkbox</i> checked will be displayed regardless of if the item is already booked.
Match Profile	If you have set up a Profile (See Section 7.2.8.Adding Rental Data) for the customer (i.e. indicated which size he/she uses for different stock types), you can put a check mark in the Match Profile box to instruct EVE to only show items of the size that matches the profile size when the equipment search is performed.

Once you find the item you wish to book, double-click on it to add it to the customer’s dive bag. The item is automatically marked as booked and will not be available for future bookings during this time period (unless the item has the *Bypass Double Booking Check checkbox* checked). The following information is displayed in the grid.

Stock Type	The category of item (for example, Wet Suit, Snorkel, etc.) is displayed.
Ref #	Your store’s reference number for the item is displayed. You can use your own numbering system, for example, BCD1, BCD2, etc.
Serial #	The serial number of the item if there is one.
Manufacturer	The manufacturer of the equipment item.
Description	A description of the item.
Size	The size of the specific piece of equipment is displayed.
Primary Color	The primary color of the piece of equipment is displayed.
Secondary Color	The secondary color of the piece of equipment is displayed.
Price	The amount before tax owed by the renter for the rent of the equipment item for the period specified is displayed.
Tax	For rentals, EVE calculates the tax based on the tax band you have assigned to the Equipment Rental Stock Type. The tax value cannot be changed in the Rentals Module. Instead, you can update it when you add the booking to an invoice in the Sales Module.
Total	Total due to be paid for the rental of the equipment item. Again, this can be changed in the Sales Module.

Actual Start Date	Date/time the item was checked out to the customer. If you are booking items to be taken away immediately this will be the same as the due date start
Actual End Date	Date/time the item was checked back in.
Sub Total	These boxes show the amount (pre-tax) and tax due on the booking. They are not editable. The sub-total is the sum of all prices in the dive bag grid. The tax is the sum of all taxes in the dive bag grid. The total is the sum of the sub total and tax.
Tax	
Total	

Equipment Profile

On the Rental Booking Cool bar, click the **Profile** button to load the Profile form.

The profile identifies the equipment a customer needs to rent on an ongoing basis. You can pre-define the profile on the Customer form (See Section 7.2.8.Adding Rental Data) or you can click on sizes here on the Profile form, both to book equipment for this booking and to set up the Profile for future reference. You can identify specific sizes of gear or alternatively indicate that any size of a gear type will do. Only gear that has been marked *For Profile* when Setting Rental Options (See Section 4.3.7.Rentals Options) will be shown.

Beneath the profile items are some options that identify what will happen when you click on a **Size** button

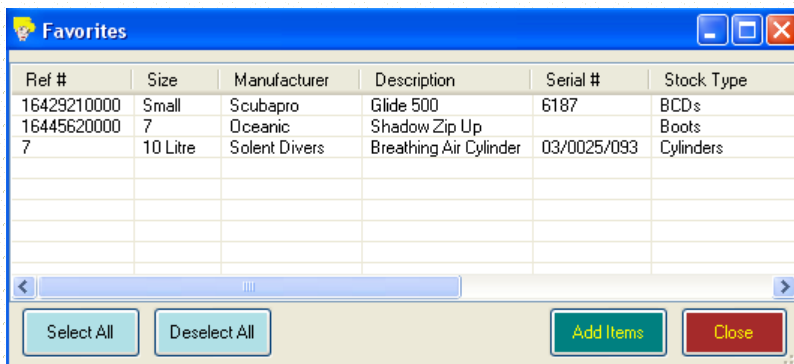
Show a List of Matching Items	The Equipment Search box is displayed and filters are put in place by EVE that match the stock type and size clicked. For example, if you click on the highlighted Small box in the BCD line - only Small BCDs will be displayed in the Equipment Search. If you click on Any - all items matching the Equipment Type will be displayed.
Choose a Matching Item for Me	EVE will automatically add an item to the customer's dive bag that matches the selection you make. For example, if you click on the highlighted Small box in the Gloves line, a small set of gloves will be automatically added to the Dive bag. If no matching items are found, the Equipment Search box is opened so you can choose different criteria to find an alternative item.
Indicate Any Item of this Type and Size is Required	This option adds a 'generic' item to your rental booking with the Stock Type and Size indicated. For example, with this option selected, if you click on the highlighted Small Medium Long box in the Semi Dry Suit line, a line indicating that any size Small Medium Long Semi Drysuit is required is added to the rental booking. This is useful for dive centers that do not track the specific item that

	customer's rent. Larger stores may want to sell rentals up-front and at that time, with the customer present, just create a rental booking to indicate that for example, John Smith needs Any Large BCD and Any Extra Large Wet Suit, etc. Later, the rental department can bring up the rental booking that was created and assign a particular Large BCD and a particular Extra Large Wet Suit, etc.
Only include Items Available in the Booking Dates	Use this checkbox to limit the search on Equipment items to those that are available during the required booking period. You will usually want to keep this box checked.

Note: As you select items in the profile, the selected box is changed from red to blue. This does not necessarily indicate an item has been added to the booking, but rather that you have processed this item already. It is highly recommended that you review the rental booking to ensure each item you require has been added.

If you make changes to the items on the customer profile, you will be given the option to save the changes to the Customer file so the size information is loaded next time the customer wants a rental.

Favorites



The screenshot shows a window titled "Favorites" with a table of equipment items. The table has six columns: Ref #, Size, Manufacturer, Description, Serial #, and Stock Type. There are three rows of data. Below the table is a scroll bar and four buttons: "Select All", "Deselect All", "Add Items", and "Close".

Ref #	Size	Manufacturer	Description	Serial #	Stock Type
16429210000	Small	Scubapro	Glide 500	6187	BCDs
16445620000	7	Oceanic	Shadow Zip Up		Boots
7	10 Litre	Solent Divers	Breathing Air Cylinder	03/0025/093	Cylinders

Renters may have particular items of rental equipment that they favor (for example, a wetsuit that fits well, or a computer with a large display). You can assign these as favorite items by adding them to the Customer file. Then, when making a rental booking for that person, book all favorite items with one click of the mouse. Only one favorite can be assigned per equipment type per customer.

When a renter with previously defined favorite equipment, makes a booking, click the **Favorites** option on the Cool Bar menu. EVE cycles through each favored item and adds them to the booking. In this way, all favored items may be quickly booked to the selected person between the required dates, if available.

Copy from Booking

Copy Booking Items

Existing Bookings

Booking #	Start Date/Time	End Date/Time	Notes
8658	27/10/2005 1:43:00 PM	27/10/2005 8:00:00 PM	
8673	15/12/2005 8:02:00 AM	16/12/2005 8:02:00 AM	
8683	20/12/2005 5:53:00 PM	20/12/2005 8:00:00 PM	Late Return Penalty
8682	20/12/2005 5:53:00 PM	20/12/2005 8:00:00 PM	
8688	20/12/2005 8:35:12 PM	20/12/2005 8:35:12 PM	Late Return Penalty
8694	15/02/2006 4:28:00 PM	16/02/2006 4:28:00 PM	
8695	15/02/2006 4:30:00 PM	16/02/2006 4:30:00 PM	
8697	15/02/2006 4:36:00 PM	15/02/2006 8:00:00 PM	
8754	05/03/2006 7:51:00 PM	05/03/2006 8:00:00 PM	

Equipment on Booking

Description	Ref #	Serial #	Stock Type	Manufacturer
	M4		Masks	Sherwood
	M3		Masks	Oceanic
Black	30<L	73	BCDs	Beaver

Select All Deselect All Add Items Close

You may also choose to use a previous rental booking as the basis for this rental booking. Select **Copy from Booking** from the Cool Bar and a list of existing rental bookings will be displayed for the customer. When you highlight a booking, the specific items listed on the booking are displayed. You can click the **Select All** and **Deselect All** buttons to quickly add or remove Equipment Items from your booking. Click the **Add Items** button to add your selections to the new rental booking.

Import from CSV

Select File

Look in: DVD/CD-RW Drive (D:)

File name:

Files of type: Comma Separated (*.CSV)

Open Cancel

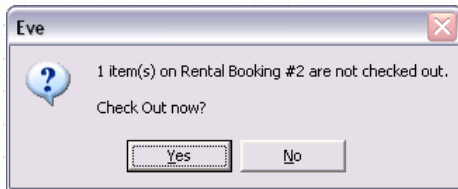
EVE supports barcode devices that can scan and store barcodes. If your rental equipment has barcodes attached to it, you can create a rental booking by scanning each item the customer requires and then docking the device to your computer and using the **Import from CSV** button to load the items onto a new rental booking. Please contact EVE DIVING for information about the barcode devices that are supported.

11.1.2 Checking Out Rental Equipment

Once you have created a rental booking for a customer, you are ready to check the gear out. The check-out procedure marks the gear as having left the dive center. It will not be available for use on other bookings and if you try to book the equipment you will get a warning message that the equipment has been checked out to another customer and has not yet been returned.

Select a booking and click the **Check-Out button** to check-out all equipment items on the booking. EVE sets the actual start date for each item to be the current date/time. If you prefer, you can check out each piece of equipment individually by entering a date in the Actual Start Date field.

Alternatively, you may check out rental equipment when you are Selling Rental Bookings (See Section 6.1.6.Selling Rental Bookings). When you add the Rental Booking to an invoice, EVE will check to see if you have selected the *Show Checkout Prompt* when Setting Rental Options (See Section 4.3.7.Rentals Options), and, if so, will ask if you want to check out the items now. If the items have already been checked out, no action will be taken.



By selecting Yes, all items on the rental booking will be marked with an Actual Start Date.

11.1.3 Selling Rental Bookings

See Selling Rental Bookings (See Section 6.1.6.Selling Rental Bookings). You can initiate a rental booking sale from the Sales Module or alternatively by creating a rental booking and clicking the **Send to New Invoice button** on the rental booking form.

You can use the Awaiting Payment section (See Section 7.2.8.Adding Rental Data) on the Customer file to view all Rental bookings which have been checked out but not yet sent to an Invoice.

11.1.4 Returning Rental Equipment

When a customer returns the rental gear, you will want to mark it as returned using the Check-In procedure.

Open the booking and click the **Check-In button** to check-in equipment items on the booking.

Penalty Charge	Customer	Booking #	Ref #	Serial #	Description	Due Start Date	Due End Date	Actual Start Date	Actual End Date
<input checked="" type="checkbox"/> 0	Shannon Kozak	8800	Cb3		C3	22/03/2006 5:3...	22/03/2006 7:0...	04/05/2006 9:1...	

The Check-In form shows all equipment items on the booking that have not yet been checked in. To check an item back in, select it and click the **Check-In button**. To check in all items click the **Select All button** and click the **Check-In button**.

If the item is overdue, it will be shown in red. Use the *Penalty Charge checkbox* to indicate whether or not you wish to charge a fee for the overdue item. Penalty fines for rental equipment are defined in the Late Return Penalty Price when creating new pieces of Equipment (See Section 4.4.16.Equipment Items). The number next to the *Penalty Charge checkbox* indicates the penalty charge amount. You can override the default penalty if you wish on the Rental Booking.

The penalty payment (if there is one) is added to the Sub-Total on the Rental Booking. Use the **Send to New Invoice button** to create a new invoice to collect the penalty charges.

If you have a busy rental department, you may want to check in all items across several different bookings. To do this use the Check In report: on the main EVE form, click **File** then **Reports** then **Rentals** then **Checked Out Items**. All items that are currently checked out are listed and you can check them in as described above.

12 SERVICES


The Services Module handles all equipment servicing. Both rental equipment and customer equipment can be booked in for service. Fault symptoms can be logged along with details of repair parts required and actions taken to repair the fault, name of the staff member dealing with the repair, etc. When the equipment is returned, the details of repair are listed along with the technician details prior to placing the item back into service.

12.1 Service Booking

Select the Services Module in the Hierarchy or from the Module buttons. Select New Service Booking from the Button Bar at the top of the form. The New Service Booking entry form will become active. The bookings that you set up here will be available when you are Selling a Service Booking (See Section 6.1.8.Selling Service Bookings).

General


Booking #	The booking number is generated by EVE. It will display as (New #XX) where XX is the number of bookings created in this session of EVE until you save the booking at which point EVE will assign a permanent booking number.
Cost Center	This will be set by EVE to be the Cost Center associated with the Equipment Servicing Stock Type.
Employee	<p>If you selected <i>Default Employee on New Records</i> when defining Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted.</p> <p>Choose the employee completing this booking from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees.</p>

	If the employee you require is not shown in the pop up list box, you can add a new Employee using the New Employee button in the pop up list box.
Customer	<p>If you have selected <i>Search by Typing First Name First</i> when you defined Customer Options (See Section 4.3.3. Customers Options), you would enter the customer's first name. Otherwise, enter the customer's last name. As soon as you begin typing, the Customer Search box will open allowing you to filter your data and search more effectively for the customer making the purchase.</p> <p>If this is a new customer making a purchase, click the New button and you will be able to Create a New Customer.</p>
Status	EVE defaults the Status to Valid on new service bookings. You will not usually want to change this.
Invoice #	When you sell this service booking on an invoice, EVE will automatically link the invoice to the service booking and display the Invoice # here. You can use the  icon to open the related invoice.

Receiving Item

Service bookings will usually be processed in 2 parts. Initially, when the customer requests the service, the service booking will be created by the sales employee and the items that need to be serviced/repaired will be 'received' and added to the booking along with a description of the work required. Later, a technician will open the booking, enter details about the work performed and add any parts they used to the booking.

When the sales person adds an item to the service booking, it appears in the Equipment grid and a tab is created for it in the tab control. The following information may be added when the item(s) are received:

Due Start Date	Enter the date the service is expected to start and when it will be finished.
Due End Date	
Booking Notes	<p>Use Notes to enter any free-text comments that you wish. The Notes are printed onto the service booking. At the top of the Notes text box are 5 icons . You can set these to hold text that you commonly add to a service booking. You can then click on the icon to add the text to the Notes field.</p> <p>To define the text for an icon, right click on it. A prompt is shown so you can enter text up to a maximum of two hundred fifty five characters. When creating a booking next time, click on the Notes icon and the previously defined text is added to the Notes text box.</p>

12.1.1 Adding Gear to the Service Booking

Search for Equipment

You can search for the customer's equipment, using the Equipment search located on the Cool bar. See Searching for Data for more information. There are a few special comments on customer Equipment searches below.

Stock Type	On the General Tab, you can identify Stock Type. This pop up list box holds a list of all Stock Types that are marked For Service (See Section 5.1.6. Stock Types). If you select one, Stock Items are filtered to show only those items that relate to that Stock Type.
Equipment Owner	On the Detail Tab, the Equipment Owner is automatically defaulted to the selected customer. Only those equipment items that are owned by the selected customer are displayed.

If the equipment item is not displayed, you can add a new equipment item using the **New Item button**. Use the **Remove button** to remove an item from the service booking that has been added in error (the item is not deleted - just removed from the current booking). To review/edit information about an item, click the **Open Item(s) button**.

Equipment Booked for Service/Repair

Stock Type	The category of item (for example, Wet Suit, Snorkel, etc.) is displayed.
Ref #	Your store's reference number for the item is displayed. You can use your own numbering system, for example, BCD1, BCD2, etc.
Serial #	The serial number of the item if there is one.
Manufacturer	The manufacturer of the equipment item.
Description	A description of the item.
Size	The size of the specific piece of equipment is displayed.
Primary Color	The primary color of the piece of equipment is displayed.
Secondary Color	The secondary color of the piece of equipment is displayed.

12.1.2 Tracking Service Details & Parts

Equipment Details

As each piece of gear is added to the service booking, a new tab for the equipment is created. Use this tab to track specific service information for the piece of equipment.

Service Booking: #350 (Miss J Hall)

Booking # Status*

Cost Center Invoice #

Employee*

Customer*

Created 6/10/2011 4:32:28 PM
Last Updated 6/10/2011 4:32:28 PM

Receive Item(s) Summary

General **Cylinder Specific Information**

Technician

Work Started

Work Ended

Next Service

Date Picked Up

Int. Pressure (Regulators) Before After

Instructions/Fault

Full Service

Action Taken

Sent for Repair To

Name/Address

RMA #

Date Sent

Due Back

Actually Back

Amounts

Estimate \$0.00

Labor \$0.00

Handling \$0.00

Parts \$21.59

Tax \$0.65

Total \$22.24

Parts

Barcode # *A* Stock # *A*

Qty	Stock Item	Stock #	Warranty #	Stock Type
1	Assembly MPV	4465		Cylinder Accessory
1	3L Cylinder Boo	800TRUB3		Cylinder Accessory

Send To New Invoice New Save Close

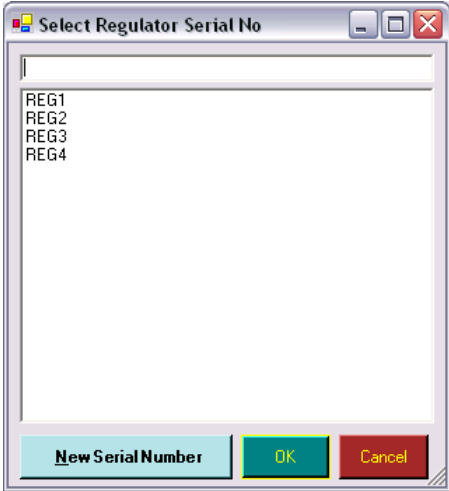
Technicians
Action Taken
Parts
Search
Certification Materials
Childrens Equipment
Clothing
Computer Accessories
Computers

Technician	Select the Technician from the pop up list box. Only those employees who have been marked as Technicians (See Section 4.4.15. Employees) will be shown.
Work Started	Enter the date and time that the service actually started and when it actually finished. If the equipment is an item of rental equipment it will be available for rent again immediately after the completion date/time.
Work Ended	
Next Service	The next service date will automatically be set to the number of months after the Work Ended date as identified when creating the Stock Type (See Section 5.1.6. Stock Types) associated with this equipment item. It can be overridden if required.
Date Picked Up	Enter the date the customer picked up the item when work was complete
Int. Pressure Before	This applies only to regulators.
Int. Pressure After	
Instructions / Fault	Enter a description of the work required. You can enter up to 255 characters
Action Taken	Enter a description of the work carried out to service/repair the equipment
Sent Repair to Name	If you need to send the equipment away to get it repaired enter the name and address of its destination.
RMA #	Enter the return authorization or other identifying number for the item that was sent away.
Date Sent	Enter the date it was sent

Due Back	Enter the date it is due back
Actually Back	Enter the date it was actually received back.

Parts

Use the form to assign parts required for the service. You can search for Parts using the Search on the Cool Bar or using the blue search fields above the Parts grid. The Stock Item Search box will be displayed. Double click on items to add them to the parts list.

Qty	The number of units of the part in the parts list. When an item is selected, this defaults to one. You can type in another amount if you choose. Each time you double-click on the Stock Item in the Search box the quantity will be incremented. If using a barcode reader the quantity is incremented during multiple swipes.
Stock Item	A description of the Part. Corresponds to the invoice description defined in the Stock Items (See Section 5.1.5.Stock Items).
Stock #	Indicates the unique stock number. The text is not editable.
Serial #	<p>If you select a Part that requires a serial number as defined in Stock Items (See Section 5.1.5.Stock Items), you will be prompted to identify the serial number of the product by selecting it from the select serial number pop up list box.</p>  <p>If the serial number for the Part is not shown, you may add one using the New Serial Number button.</p> <p>The Part description in the parts list will be modified to reflect the serial number of the item you have used.</p>
Warranty #	If the part is under warranty, enter the warranty number. If you enter any value here, the item will be marked with the Under Warranty Discount Band when the service booking is added to an invoice in the Sales Module. This makes the part free of charge to the customer.
Warranty Date	If the part is under warranty enter the warranty date
Stock Type	Indicates the category of the Part, for example, Wetsuit, Snorkel, etc. The text is not editable.
Manufacturer	Indicates the manufacturer of the Part. The text is not editable.
Primary Color	Indicates the primary color of the Part if applicable. The text is not editable.

Secondary Color	Indicates the secondary color of the Part if applicable. The text is not editable.
Size	Indicates the size of the Part if applicable. The text is not editable.
Unit Price	The price before tax of one unit of the Part. When an item is first added to the shopping basket the unit price shown is the retail price before tax that you defined in Stock Items.
Price	The price before tax of all units being purchased of the item. EVE calculates the price based on quantity * unit price.
Tax	The amount of tax. EVE automatically calculates this based on the tax band of the items Stock Type.
Total	The sum of price and tax for the item. EVE automatically calculates this.
Cost Price	The cost price of the item.
Tax Band	These values indicate the actual rate of tax for the tax band chosen
Tax Rate	
Estimate	Enter the amount (pre tax) you expect to charge the customer
Labor	Enter the amount (pre tax) you will charge for labor
Handling	Enter the amount (pre tax) you will charge for handling
Parts	The total amount (pre-tax) of all parts used in the service booking is displayed.
Tax	The total amount of tax (from labor, handling and parts) is calculated and displayed.
Total	The total amount of labor, handling, parts and tax is displayed. When this Service Booking is sent to invoice, this is the amount that will be applied to the Service Booking.

If the equipment item is a Cylinder (or more specifically, if the item's stock type has a tick in the 'Show Cylinder Info' box) then another tab will be visible called 'Cylinder Specific Information'. The information that appears on this tab depends on your country, but the screenshot below shows the full tab. All entries are optional.

Service Booking: (New #1)

Booking # [New #1] Ticket # [] Status* Valid []
 Cost Center Acme Diving Invoice # []
 Employee* Conor Straker [] Created []
 Customer* Chris Dale [] Last Updated []

Receive Item(s) Summary Cylinders SN:1234

General **Cylinder Specific Information**

External Examination
 Paint Condition []
 Location and depth of 0.015" gouges, []
☐ Fire or Heat Damage ☐ Odor
☐ Line Corrosion ☐ Bulges
 Abrasions / Scratches
☒ None ☐ Minor ☐ Serious
☒ Pass ☐ Fail ☐ Marginal

Internal Examination
 Aluminium Condition []
 Amount and composition of contents []
 Description of internal surface []
 Location and depth of any pitting []
☐ Approved ring fitted (ROC)
 ROC Color []
☒ Pass ☐ Fail ☐ Marginal

Threading
 Description of Thread Condition []
 Number Damaged []
 Crack Access []
 O-Ring Surface []
☒ Pass ☐ Fail ☐ Marginal

Valve
☐ Burst disc replaced
☐ Valve 'O' Ring replaced
 Other service needed []

Hydro
 MPE [] Buret reading at re []
☐ Equipment accuracy verified
☐ Approved ring fitted (ROC)
 ROC Color []
 Hydro ☒ Pass ☐ Fail ☐ N/A
 Repeat Vis ☒ Pass ☐ Fail ☐ N/A

Cylinder Condition
☒ Pass ☐ Fail ☐ HAZNO Sticker Attached
☐ Tumble ☐ Hydro ☐ Discard
 Action Taken []
 Periodic Certificate Number [] []

Technicians
 Alison May
 Dave Underwood
 David Armstrong
 David Spade
 Greg Prior
 John French
 Laura Pretlove
 Lesley Boost
 Q B
 Q C
 Q V
 R W
 Roger Lockwood
 Action Taken
 Parts

Send To New Invoice New Save Close

12.1.3 Booking Rental Equipment for Service

Occasionally, you will need to book rental equipment for service, either to repair it or as part of your regular service process. To do so, follow the same steps described in Creating a New Service Booking. You will identify the customer as '.Rental. .Equipment.' Only Equipment in your rental department will be available for booking.

As you book each piece of equipment, it will automatically be made unavailable for booking in the rental module for the dates you set on the Service Booking. It will remain unavailable until the Work Ended date has been reached.

12.1.4 Selling a Service Booking

See Selling Service Bookings (See Section 6.1.8.Selling Service Bookings) for information on this process. You can initiate a service booking sale from the Sales Module (by selling an item with the stock type of Equipment Servicing) or alternatively by creating a service booking and using the Send to **New Invoice** button on the service booking form.

You can use the Awaiting Payment section on the Customer file (See Section 7.2.8.Adding Rental Data) to view all Service bookings that have been completed and picked up but not yet sent to an Invoice. See Customers for more information.

13 RESORT RESERVATIONS

EVE now provides you the ability to book rooms for customers in your resort or to track resort reservations for customers traveling to and from your location. Track customer arrival and departure dates to ensure smooth check in and check out procedures. Book customers into specific rooms based on room availability. Sell Resort Reservations in the Sales Module and track the profitability of your resort.

13.1 Resort Reservations

13.1.1 Creating a New Resort Reservation

Select the Resort Reservations Module in the Hierarchy or from the Module buttons. Select New Resort Reservation from the Button Bar at the top of the form. The New Resort Reservation entry form will become active. Note: if you don't see the Resort Reservations module, you can turn it on as follows: click on the UI button at the top right of the program and then click Open UI Config. Click on the EVE Form Nodes tab and put a tick in the Resort Reservations box. Click Save.

General

The screenshot shows a software window titled "Room Booking: (New #1)". It contains several input fields: "Booking #" with a dropdown showing "(New #1)", "Employee*" with a text box containing "Shannon Kozak" and a small icon, and "Customer*" with an empty text box. There are also "Invoice #" and "Notes" fields. Below these are tabs for "Due Dates", "Hotel/Room", "Actual Dates", and "Flight". The "Due Dates" tab is selected, showing "Due to Arrive" and "Due to Leave" sections. Each section has a "Date*" dropdown (both showing "April 26, 2006") and a "Time*" dropdown (both showing "1:38:36 PM"). At the bottom right are "Created" and "Last Updated" labels. The bottom of the window has a toolbar with icons and three buttons: "New", "Save", and "Close".

Employee

If you selected *Default Employee on New Records* when Setting Data Entry Options (See Section 4.3.9.Data Entry Options), the name of the currently logged on employee will default here. Otherwise, no employee will be defaulted.


Choose the employee completing this transaction from the pop up list box. The pop up list box holds a list of all individuals that have been identified in Employees (See Section 4.4.15.Employees).

If the employee you require is not shown in the pop up list box, you can add a new Employee using the **New Employee** button in the pop up list box.

Customer

Enter the customer's name here.

If you have selected *Search by Typing First Name First* when you defined Customer Options (See Section 4.3.3.Customers Options), you would enter the customer's first name. Otherwise, enter the customer's last name. As soon as you begin typing, the Customer Search box will open allowing you to filter your data and search more effectively for the customer making the purchase.

	If this is a new customer making a booking, click the New button on the Search form and you will be able to Create a New Customer.
Invoice #	If this resort reservation was sold through an invoice, the related Invoice will be listed here. Click on the  icon to open the invoice.
Arrival Due Date	Enter the date and time you expect the customer to arrive at your resort/hotel.
Arrival Due Time	
Departure Due Date	Enter the date and time you expect the customer to depart from your resort/hotel.
Departure Due Time	
Notes	Enter any notes which you wish to track related to this customer's resort reservation.

Hotel Room


Room Booking: (New #1)

Booking #


(New #1)

Employee*


Shannon Kozak



Customer*



Invoice #




Due Dates

Hotel/Room


Actual Dates

Flight

Hotel



Room #










Rate per Night

Availability

Notes

Created

Last Updated



New

Save

Close

Hotel	Select the Hotel (See Section 4.4.20.Hotels) from the pop up list box. You may wish to include only the hotel at your resort or all of the hotels which your customer's stay at.
Room #	If you defined specific rooms for the Hotel, this selection box will become available. Select the room from the pop up list box.
Rate per Night	You will use this field to track hotel rates at resorts other than your own. This field is for information purposes only and cannot be added to an invoice. To charge your customers for a room, you will want to set up a Resort Reservation stock type, specific stock items for each room type and use the Selling Resort Reservations process.

Room Availability

To check the availability of a specific room, click the **Availability** button.

Room#	Room Type	Monday 01	Tuesday 02	Wednesday 03	Thursday 04	Friday 05	Saturday 06	Sunday 07	Monday 08
1	Single								
10	Double			<< HAAF	HAAF	HAAF	HAAF	HAAF	HAAF
11	Double								
12	Double				<< BABCOCK	BABCOCK	BABCOCK	BABCOCK	>> BABCOCK
13	Double								
15	Twin								
18	Twin								
19	Suite								

Hotel: Resort Self Catering Rooms Room Type: Year: 2006 Month: May New Booking

All of the rooms that match the selected hotel are displayed. Availability for the current month is displayed. Rooms that are booked will be marked with the customer's last name. Rooms that are available are blank.

Use the scroll bar at the bottom of the screen to see additional dates within the current month. Use the **Forward** and **Backward** buttons on the bottom right of the screen to move the calendar to future (or past) months. Alternatively, you can select the Year and the Month you wish to view from the drop down list boxes. You can identify the specific Room Type or change the Hotel is you choose.

Use the **New Booking** button to quickly add another booking.

Actual Dates

Booking # [New #1]

Employee* Shannon Kozak Invoice #

Customer*

Due Dates Hotel/Room Actual Dates Flight

Actually Checked In

Date April 26, 2006 Time 1:38:36 PM

Actually Checked Out

Date April 26, 2006 Time 1:38:36 PM

Notes

Created Last Updated


New Save Close


Actual Check In Date	Enter the date and time the customer actually arrived at your resort/hotel.
Actual Check In Time	
Actual Check Out Date	Enter the date and time the customer actually checked out of your resort/hotel.
Actual Check Out Time	


Flight

Room Booking: (New #1)

Booking #

Employee* 

Customer* 

Invoice # 

Due Dates | Hotel/Room | Actual Dates | **Flight**

Arrival Details

Date

Time







Departure Details

Date

Time

Notes

Created
Last Updated

Flight Arrival Date		Enter the date and time of the customer's arrival flights
Flight Arrival Time		
Flight Date	Departure	Enter the date and time of the customer's departure flights.
Flight Time	Departure	

14 MANAGING STAFF TASKS

EVE provides a number of tools that you can use to manage your staff members and ensure they are both productive and effective. Use EVE to schedule staff members for work at your dive center as well as to assign them to courses and to trips. Assign tasks to staff members and send reminders to their desktops. Schedule follow up contact with customers and assign contacts to specific staff members.

14.1 Staff Schedules

Load the Employee Schedule Wizard in one of the following ways:

- ❖ Right click on a day in the Calendar and then select New Employee Schedule on the pop up menu
- ❖ Right click on an existing employee schedule in the Calendar and then select Properties on the pop up menu.

The form shown below is loaded so you can create a new employee schedule and assign times and locations, etc.

Staff Schedule

The screenshot shows a software window titled "Staff Schedule: (New #1)". Inside the window, there are several input fields: "ID" with the value "(New #1)", "Staff Member*" with "Giovanni Saracino", "Date*" with "Tuesday, March 13, 2012", "Start Time*" with "09:00 AM", "End Time*" with "07:00 PM", and "Location" with "Stoney Cove". There is also a "Notes" text area and a "Recurrence" button. At the bottom of the window, there are three buttons: "New", "Save", and "Close".

Staff Member	Choose the staff member from the pop up list box.
Date	Enter a date using the Calendar control.
Start Time	Enter the Start and End times.
End Time	
Location	Optionally, pick the Location at which the staff member will be working.
Notes	Optionally, enter any Notes relating to the staff member's schedule
Recurrence	Once you have set up a schedule that closely or exactly matches your ongoing needs, click the Recurrence button to generate multiple schedules.

Recurrence

☒ Daily
 ☐ Weekly
 ☐ Monthly
 ☐ Yearly

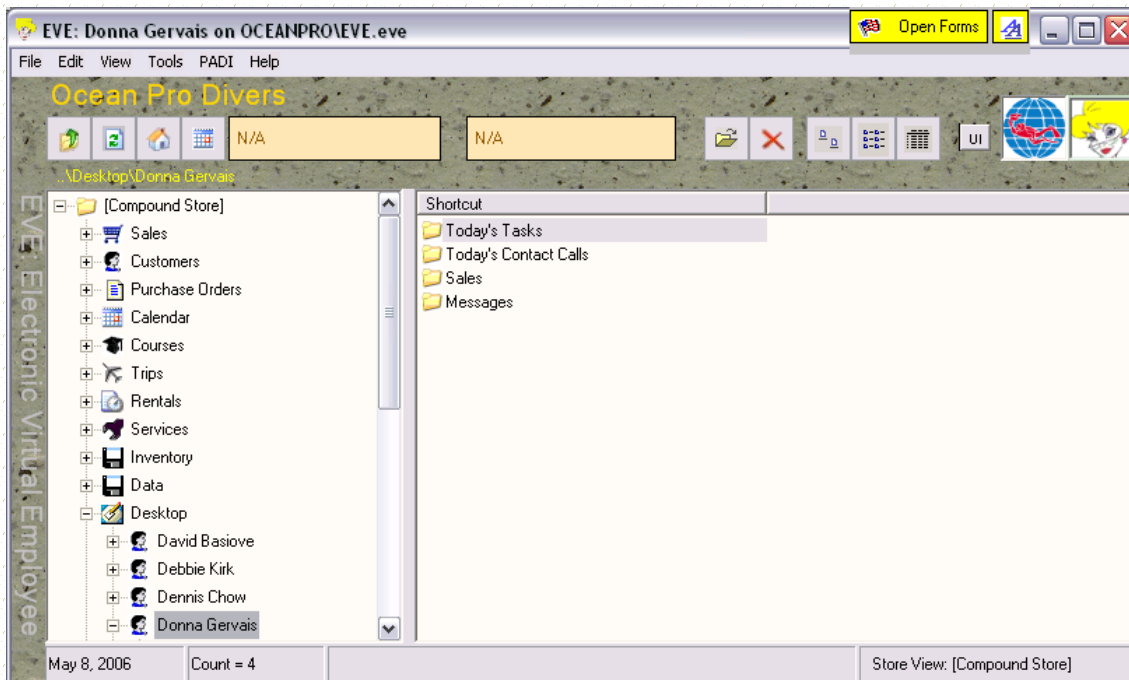
☒ Every 1 day(s)
 ☐ Every Week Day
 ☐ Every Week End Day

Starting On: May 8, 2006
 Ending On: May 8, 2006

You can create a recurring schedule on a Daily, Weekly, Monthly or Yearly basis. Select the option that most closely matches your recurrence, select a starting on and ending on date. The schedule and all of the data you have attached to it will be duplicated using the dates you defined.

14.2 Desktop

Each staff member is assigned their own desktop in the Desktop Module. The desktop includes today's tasks and contact calls. A summary of the staff member's sales and any messages that the staff member should read is displayed.



14.2.1 Assigning Tasks

EVE offers a powerful feature to help you manage staff member tasks. You can schedule specific tasks that need to be completed. The proposed date/time, actual date/time and employee responsible can be logged.

Tasks

The screenshot shows the 'Task: (New #2)' window. It has a title bar with standard window controls. The main area is divided into several sections:

- Task ID:** A text field containing '(New #2)'.
- Task Type:** A dropdown menu.
- Employee:** A text field containing 'Shannon Kozak'.
- Status:** A dropdown menu containing 'Not Started'.
- Due:** A section with 'Date*' (April 26, 2006), 'Start Time*' (1:35:47 PM), and 'End Time*' (1:35:47 PM).
- Actual:** A section with 'Date*' (April 26, 2006), 'Start Time*' (1:35:47 PM), and 'End Time*' (1:35:47 PM).
- Notes:** A large text area.
- Reminder:** A section with 'Date*' (April 26, 2006) and 'Time*' (1:35:47 PM).
- PCs where Reminder should be shown:** A list box with 'Add All', 'Add', and 'Remove' buttons.

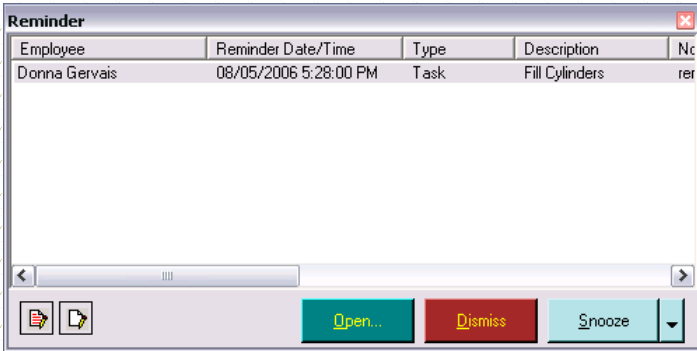
 At the bottom, there is a toolbar with icons for navigation and a set of buttons: 'Recurrence', 'New', 'Save', and 'Close'.

Task Type	Select the Task Type from the pop up list box. If the task type you require is not displayed, you can click the New button on the pop up list box to create a new task type.
Employee	Enter the name of the Employee responsible for the contact call. The name of the logged on employee will default.
Status	Select the Status of the task. Generally, new tasks will have a status of Not Started. As employees progress on a task, they can change the status to Started, Completed or Void. You can add new task statuses on the pop up list box.
Due Date	Enter the date you want the task to be completed. You can enter a specific start and end time if you choose.
Start Time	
End Time	
Actual Date	Employees will track the actual date the task is completed along with a start and end time if appropriate. You can use these dates to monitor employee effectiveness.
Start Time	
End Time	
Notes	Enter any Notes related to the task.
Reminder Date	Enter the Date and Time to send a reminder for the employee. You set a period for EVE 5 to <i>Check for Reminders</i> when Setting EVE Options (See Section 4.3.1.EVE Options).
Reminder Time	
PCs where Reminder should be Shown	Select the PC Where the Reminder Should be Shown. If the employee works at multiple locations or if you have multiple PCs at your location, you may choose to Add All. Otherwise you can click the Add button and Remove buttons to select one or more PCs.

EVE will check for reminders on a periodic basis. When the reminder time comes up, you will get an alarm clock sound - if you *Enabled Sounds* when Setting EVE Options (See Section 4.3.1.EVE Options) and a visual reminder at the PCs you selected earlier.



When you click on the Reminder screen, a list of all Reminders is displayed. If you do not select the Reminder screen - the alarm will sound again every minute.



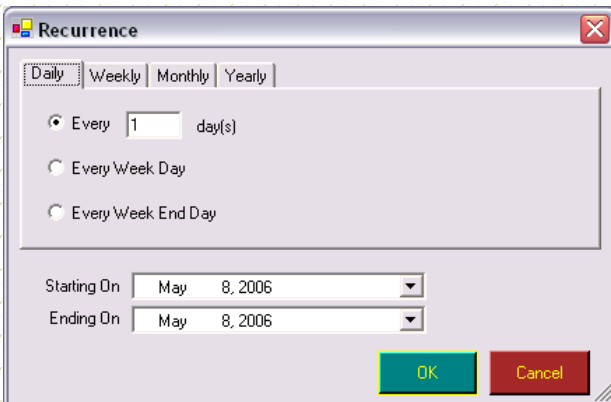
Employee	The Employee responsible for the task is displayed.
Reminder Date/Time	The Date and Time of the reminder is displayed.
Type	The Type of task to be made is displayed.
Description	The follow up action required is displayed.
Notes	Any Notes associated with the task are displayed.

You can choose **Snooze** button to have the Reminder pop up again at a later time. Use the **Dismiss** button to close the reminder permanently.

If you Double-click on the reminder detail form will be loaded.

Recurrence

Once you have set up a task that closely or exactly matches your ongoing needs, click the **Recurrence** button to generate multiple tasks.



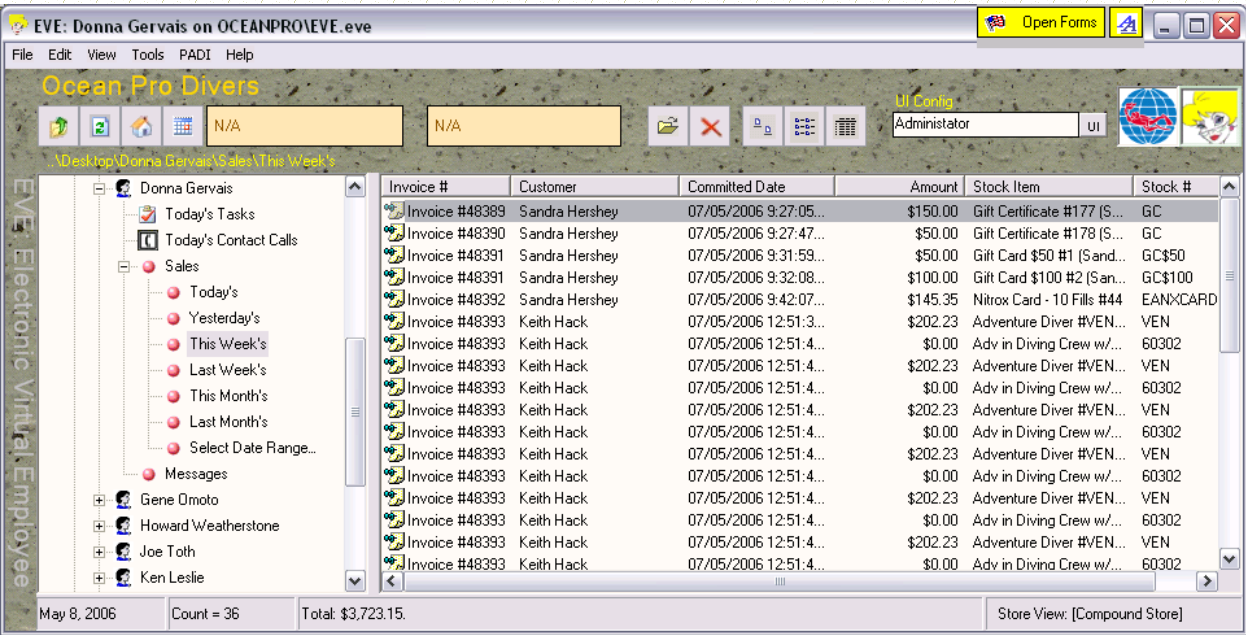
You can create a recurring task on a Daily, Weekly, Monthly or Yearly basis. Select the option that most closely matches your recurrence, select a starting on and ending on date. The task and all of the data you have attached to it will be duplicated using the dates you defined.

14.2.2 Assigning Contact Calls

EVE offers a powerful feature to help you connect with your customers. You can schedule contact calls or emails that will be made to customers. For example, a call could be scheduled to follow up on a continuing education interest expressed by the client. The proposed date/time, actual date/time and employee responsible can be logged. Contact Calls are fully described in Customers (See Section 7.Customers).

14.2.3 Tracking Sales

The Sales section of the staff desktop provides the opportunity for employees to review their sales for a specified period.

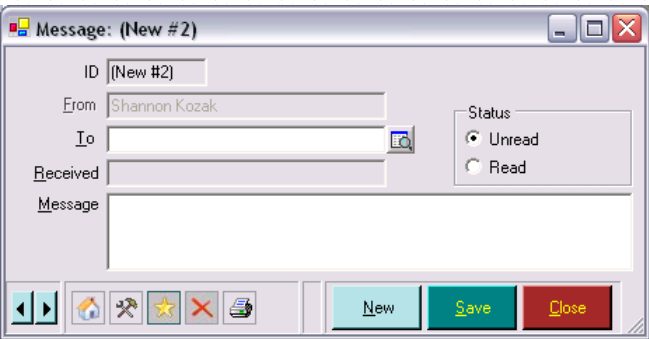


All sales in the period are listed along with the individual amounts of the sales. The total items sold and the total value of the sales (including taxes) is displayed in the status bar. Set targets for employees and they can review their sales to see how they are tracking!

14.2.4 Sending/Receiving Messages

Create a new message by using the Message option under File / New / Desktop.

Message

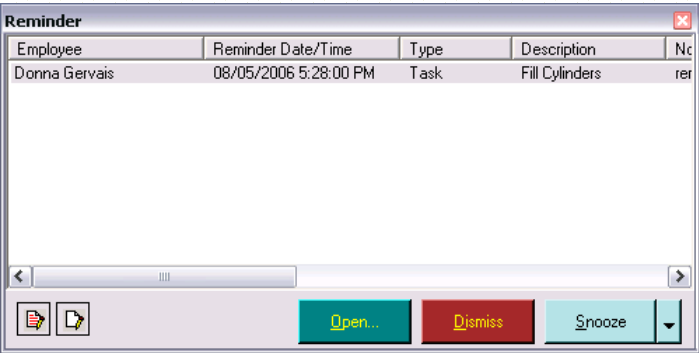


From	The message will be created by the logged on employee. This cannot be edited.
To	Select the name of the employee for whom the message is for.
Received	When the employee opens the message, EVE will automatically populate the

	Received field with the system date and time.
Message	Type the message for the employee.
Read/Unread	New messages are marked as unread. When the employee read the message, he or she can mark it as read so it will no longer appear in the Reminders list.

14.2.5 Managing Reminders

Reminders for Contact Calls and Tasks will be automatically sent by EVE to the identified computer. Employees may choose to review reminders at any time by selecting Reminders from the **View menu**.



Employee	The Employee responsible for the task is displayed.
Reminder Date/Time	The Date and Time of the reminder is displayed.
Type	The Type of task to be made is displayed.
Description	The follow up action required is displayed.
Notes	Any Notes associated with the task are displayed.

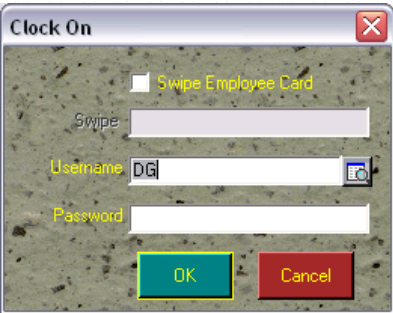
You can choose Snooze to have the Reminder pop up again at a later time. Use the **Dismiss button** to close the reminder permanently.

If you Double-click on the reminder the detail form will be shown.

14.3Clock On/Off

You may ask your employees to clock on and off to indicate their arrival and departure time from work. This is especially effective if you pay your employees based on hours worked. The Clock On option allows employees to mark their arrival without actually logging on to EVE (which may change the user privileges on the system).

When an employee clock's on or off by using the Clock On or Clock Off option under the **File menu**, the Clock On screen is displayed.



Employees can clock on using their password or swipe card. The logged on user is not updated.

The following form is created in the background and can be reviewed in the Calendar.

The screenshot shows a software window titled "Clock On/Off: Shannon Kozak". The form contains the following fields and controls:

- ID**: A text box containing the value "924".
- Employee***: A text box containing the name "Shannon Kozak" with a search icon to its right.
- Clock On***: A date and time selector showing "May 8, 2006" and "5:49:24 PM".
- Clock Off**: A date and time selector showing "May 8, 2006" and "5:49:47 PM".
- PC***: A text box containing "OCEANPRO" with a search icon to its right.
- Store**: A text box containing "Ocean Pro Divers".
- Notes**: A large, empty text area on the right side of the form.
- Buttons**: At the bottom, there is a row of icons (back, forward, home, search, star, delete, print, lock) followed by three buttons: "New" (light blue), "Save" (teal), and "Close" (red).

You can use this to examine the times that your employees clocked on and off. When a user clocks on to the system in the morning, a new record is added specifying the user name and clock on time. The clock off time is left blank. When the user clocks off (using the clock off menu option) the Clock Off time is entered. You can run the Attendance report (See Section 18.2.7.Admin Reports) to see total attendance times for each employee in the period you request.

15 CALENDAR

Load the calendar by clicking on the Calendar icon  on the main screen or by clicking View then Calendar.

The calendar lets you view and create courses, trips, staff work schedules, hours worked, tasks, resort reservations and contact calls using a familiar calendar month view. Each colored block on the calendar represents one appointment. An appointment may be a course module, or one day of a trip or one block of scheduled work for an employee.

You can move between months using the year and month pop up list boxes or by clicking on the left and right arrows to move to the previous and next month respectively. You can return to the current month by clicking on the **This Month** button.

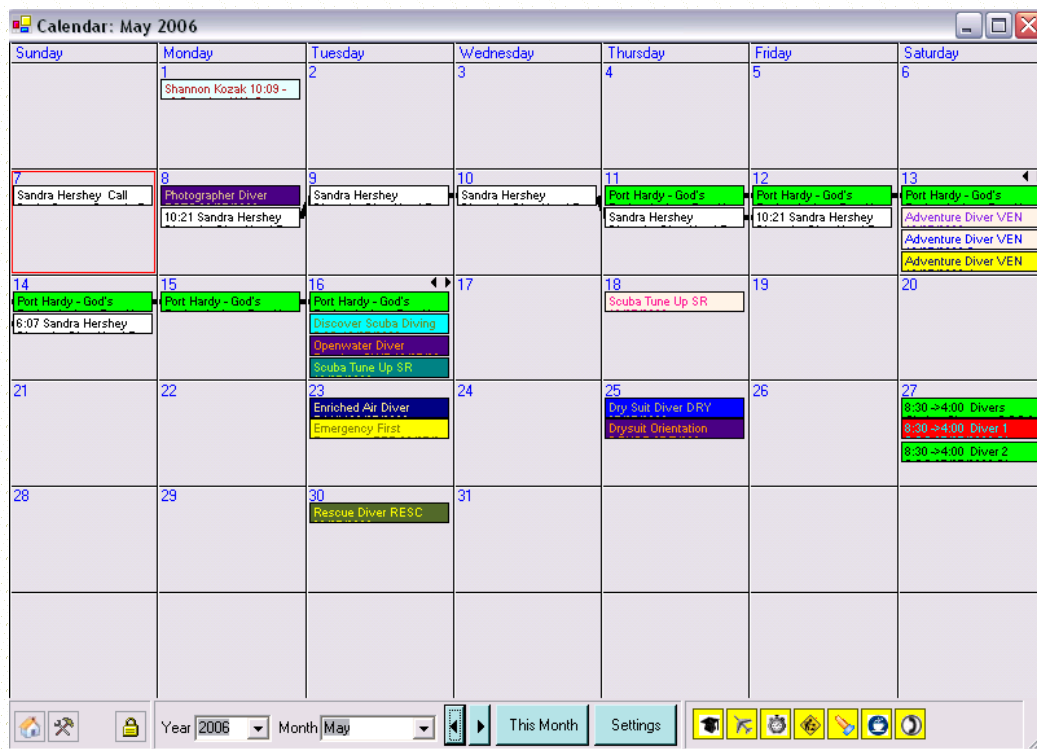
Click on the padlock to unlock the calendar. Once unlocked, you can reschedule appointments by dragging them to a different day using your mouse.

If you right click on an appointment box the appointments menu will pop up. If you right click on the calendar background the calendar menu will pop up.

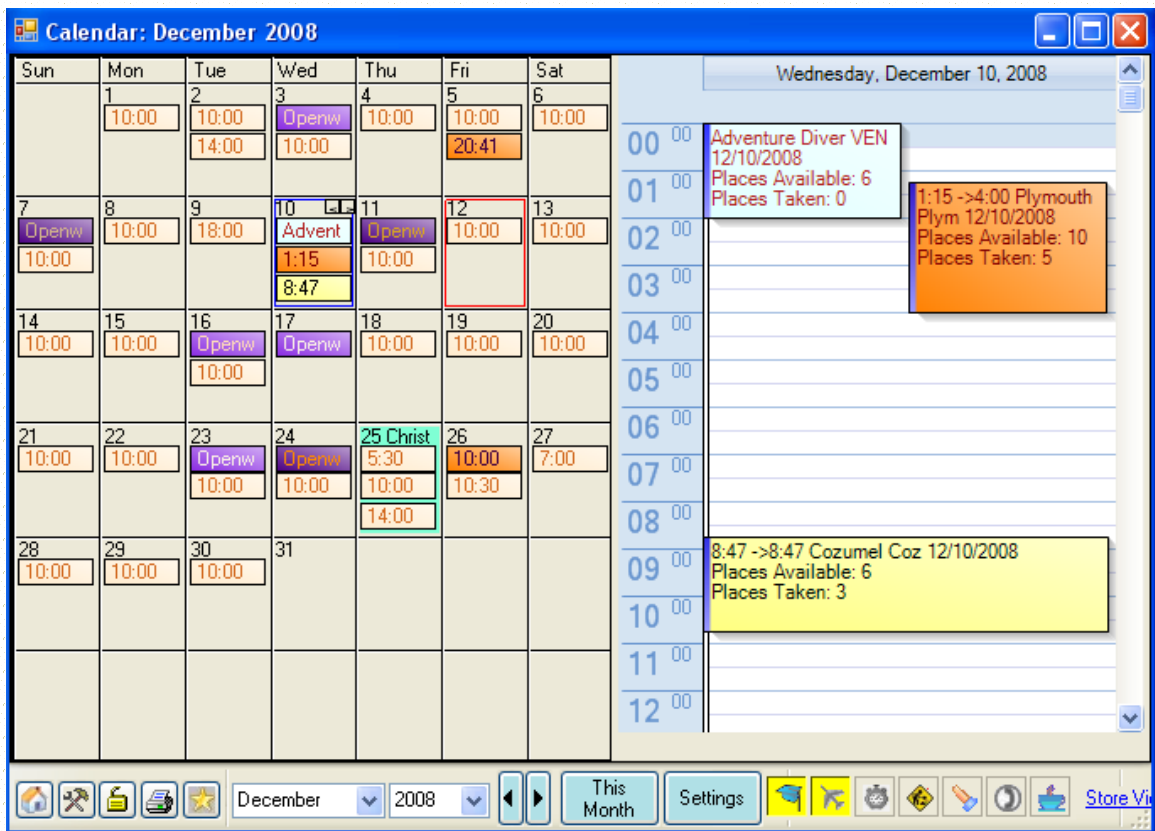
Print the calendar by clicking on the **Print button**. This will print to your default windows printer.

Once you have selected what information to show on the Calendar you can filter the information by using the

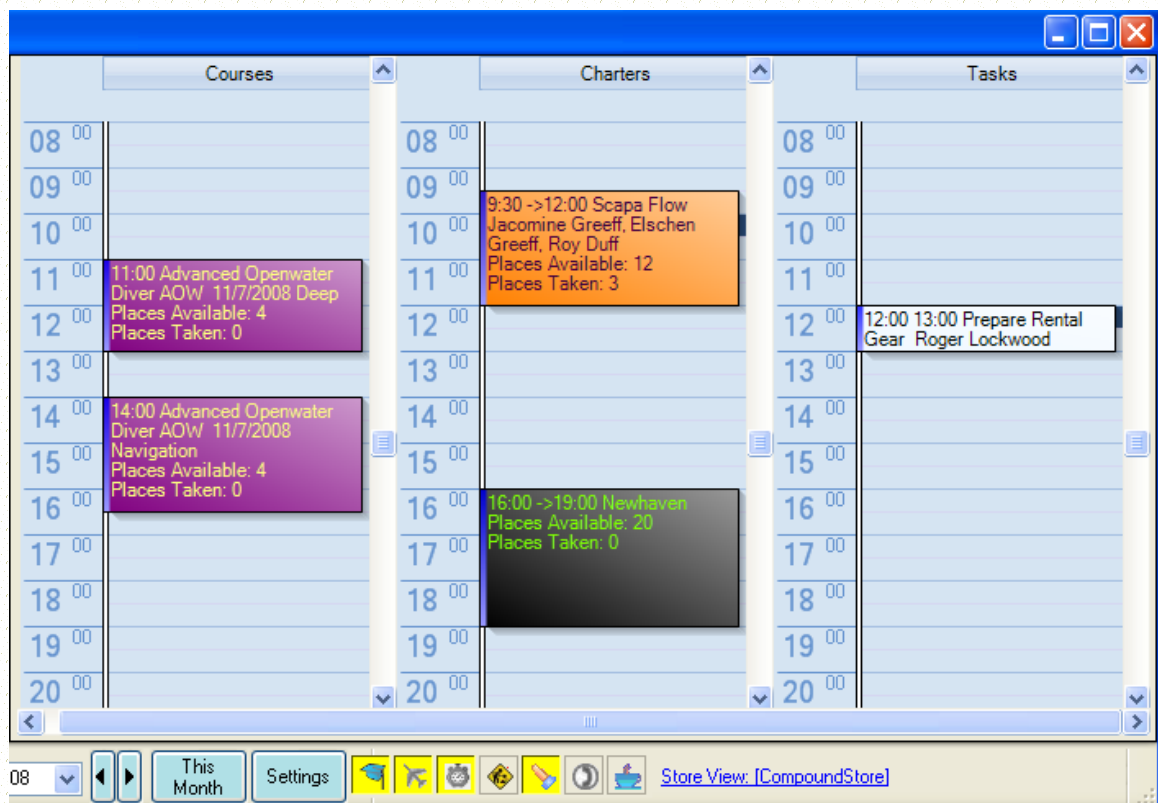
Filter buttons at the bottom of the screen.  Click on each button to show or hide associated data from the display. Each button has a yellow background if that type of data is currently turned on and displayed on the calendar, otherwise it has a gray background.



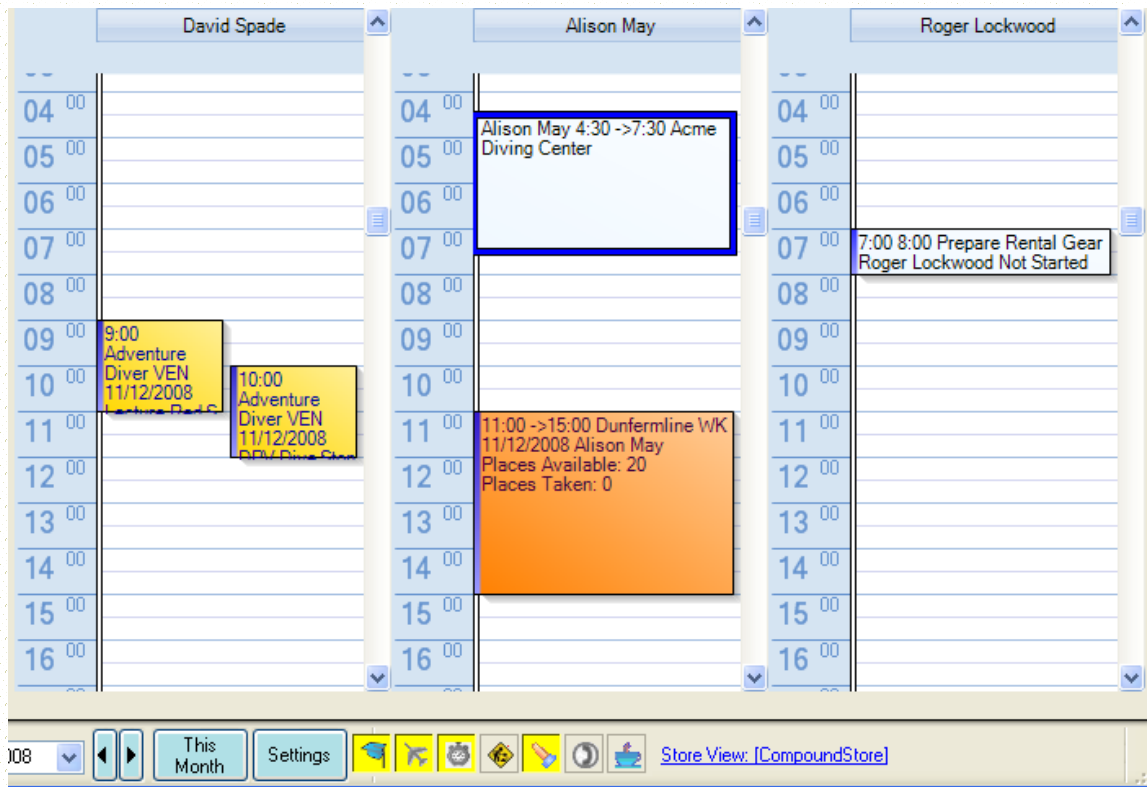
In addition to the main Calendar, you can turn on one or more Day Views. These show more detailed information about the day selected on the main Calendar.



Different views can be set up to show different information in each view. E.g. below, EVE has been configured to show Courses, Charters and Tasks side-by-side in different Day Views.



...and below, Day-Views have been configured for individual Staff Members.



15.1 Calendar Settings

15.1.1 Setting up the Calendar

Click the **Settings** button at the bottom of the screen to change which information will appear in the Calendar and how that information looks - for example, you could show only courses, or only appointments involving a certain employee, or location, etc.

General

There are several sections on the General tab of the Settings form:

Information to Show	Put a check mark in one or more of the boxes to make that information appear in the Calendar. For example, you could put a check mark in the Show Courses and Show Trips boxes to make courses and trips appear in the calendar but not employee schedules, etc.
Day Views	<p>Count: Set the Count to zero if you do not want to see the Day View control. Otherwise, enter a value greater than zero to show that many Day View controls. Each Day View could be configured to show different information. E.g. you could have one showing Courses on the selected day, and one showing Trips. Alternatively, you could have one showing information relating to employee John Smith and another showing information for Mary Jones.</p> <p>Total Width: this is the combined width of all Day Views.</p> <p>Minimum Width: If you resize the main Calendar, the Day Views will resize as well to fit the available space. The Minimum Width indicates the smallest width that each Day View will size to.</p> <p>Synch when Scrolling: If multiple Day Views are shown and this box is checked, when you scroll one Day View, they will all scroll together - i.e. they will all show the same time of day.</p> <p>Time Period: Choose one of the time periods from 5 to 30 minutes. The day will be broken down into slots of that period. E.g. if you need to schedule appointments down to the nearest 15 minutes, choose 15.</p> <p>Header: One row will appear in the Header section for each Day View. You can click onto the Row and then click again to put the row into Edit mode so you can change the text that will appear above that Day View in the Calendar. E.g. the first header may be 'Courses' and the second 'Trips', or the first header may be 'John Smith' and the second 'Mary Jones'. If you leave the default header name (i.e. DayView1, DayView2, etc.) the selected date will appear in the Day View's header when it is shown in the Calendar.</p>
Start of the Week	By default, the Calendar will show the week starting on Sunday (i.e. Sunday will be in the first column). You can change which day will appear in the first column by selecting that day in the 'Start of Week' pop up list box.

Calendar Height	<p>You can set the default height of each Day in the Calendar form by choosing the Fixed Height option and typing the new height (in pixels) into the box. If you type a height value that results in later days of the month falling off the bottom of the screen, you can use your mouse to drag the Calendar down to make those days visible.</p> <p>If you choose Scale to Fit, EVE will set the height of the Days so each one is on display.</p>
Calendar Width	<p>You can set the default width of each Day in the Calendar form by choosing the Fixed Width option and typing the new width (in pixels) into the box. If you type a width value that results in days falling off the right hand side of the screen, you can use your mouse to drag the Calendar to the right to make those days visible.</p> <p>If you choose Scale to Fit, the Days will automatically size themselves so each one is on display.</p>
Colored Boxes	<p>Change the value of the Height box to change the height of each colored appointment box in the Calendar.</p> <p>An alternative (and easier way) to change the box height is, on the Calendar itself, to drag your mouse over the lower portion of an appointment. The cursor will change into a 2-headed arrow. Click and hold down the Left Mouse button and then drag the mouse up or down. The box will resize accordingly. Release the Left Mouse button when the box is the required height. All boxes in the Calendar will resize to be the same height.</p> <p>Change the value of the Font box to change the font size used on each appointment label.</p> <p>If there are too many appointments on one day to fit, a set of scroll bars will be displayed at the top of the day box. Click on this to scroll across to see more appointments.</p>

Courses

Use the Courses tab to further filter which courses will be displayed in the Calendar - for example, you could set it temporarily to only show Complete Open water courses that involved a particular employee, etc.

There are several sections on the Courses tab of the Settings form:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Start Date Only	By default, the Calendar will show one appointment box for each module comprising a course - for example, for an open water course you would see one box for the Induction lecture, one for Classroom Session 1, one for Classroom Session 2, one for Confined Water Session 1, etc. If you only want to see one appointment box that marks the start date of the whole course, put a check mark in the "Start Date Only" box.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want each course type to appear in a different color so that, for example, Open Water courses appear with a red background and Advanced Open Water courses appear with a green background. Alternatively, you may want all course modules being taught in Classroom 1 to appear in yellow, whilst those in Classroom 2 to appear in blue. Alternatively, you may want courses with places (spaces) available to show in green and those that are full in red. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Completion	By default, the Calendar will show courses whether they are complete or not. If you only want to see Complete courses, click on the Complete option in the Completion section. If you only want to see incomplete courses, click on the Incomplete option.
Course Type	By default, the Calendar will show courses of all types. You may want to change this behavior so that, for example, only Open Water courses are shown, or Open Water and Advanced courses, but no others. Put a check mark against each Course Type that you want to appear.
Employees	By default, the Calendar will show courses regardless of who the instructor is. You may want to change this behavior so that, for example, only courses being taught by a particular instructor or group of instructors are shown. Put a check mark against each Instructor whose courses you want to appear.

Locations	By default, the Calendar will show courses regardless of what location they are held at. You may want to change this behavior so that only courses being held at a specific location(s) are shown.
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One important point to Note and this relates to all types of data on the Calendar, not just Courses: if one or more Day Views are turned on, you will see a tab for each Day View in the Filters section on the right hand side of the Settings form. You can set different filters for each Day View on display. The Filter criteria work based on the criteria defined on the main Filters tab. I.e. if the Filters tab is restricted to show only Open Water Courses, then the Day Views will also only show Open Water Courses - and you may further restrict the Day Views then e.g. so the first Day View only shows OW courses for staff member 1 and the second Day View only shows OW courses for staff member 2.

Trips

Use the Trips tab to further filter which trips will be displayed in the Calendar - for example, you could set it temporarily to only show incomplete trips to Aruba, etc.

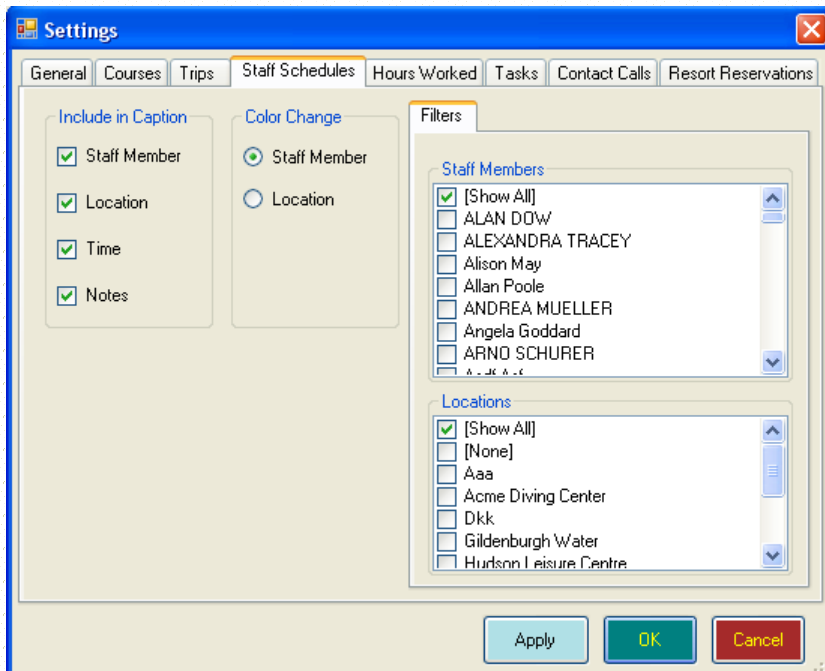
There are several sections on the Trips tab of the Settings form:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want trips to each Destination to appear in a different color so that, for example, Cayman Brac trips appear with a red background and Cozumel trips appear with a green background. Alternatively, you may want trips with places (spaces) available to show in green and those that are full in red. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Completion	By default, the Calendar will show trips whether they are complete or not. If you only want to see Complete trips, click on the Complete option in the Completion section. If you only want to see incomplete trips, click on the Incomplete option.
Destinations	By default, the Calendar will show trips to all Destinations. You may want to change this behavior so that, for example, only trips to Cayman Brac are shown, or Cayman Brac and Grand Cayman trips, but no others. Put a check mark against each Destination that you want to appear.

Boats	By default, the Calendar will show trips on all Boats. You may want to change this behavior so that, for example only trips on your boats are shown and not those on any charter operator that you hire. Put a check mark against each Boat that you want to appear.
Employees	By default, the Calendar will show trips regardless of which employees are attending. You may want to change this behavior so that, for example, only trips being attended by a particular employee or group of employees are shown. Put a check mark against each Employee whose trips you want to appear.

Staff Schedules

Use the Staff Schedules tab to further filter which schedules (i.e. scheduled work hours) will be displayed in the Calendar - for example, you could set it temporarily to only show those relating to a particular employee and/or location, etc.



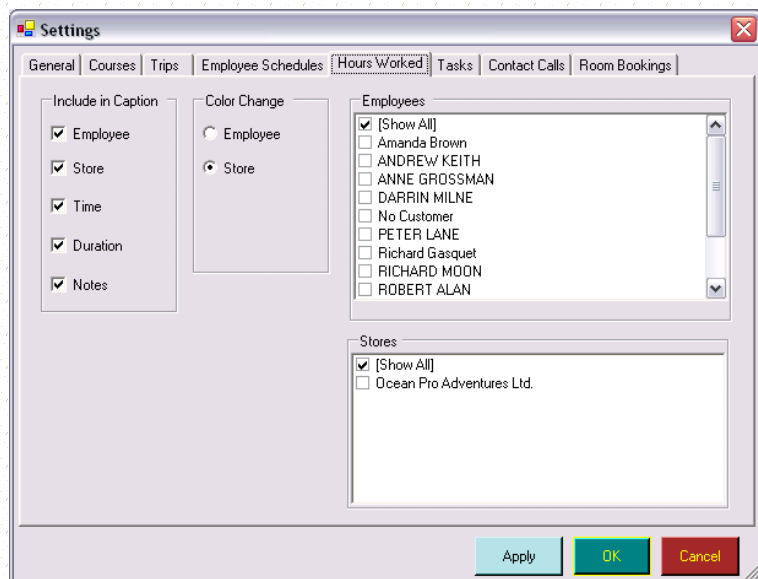
There are several sections:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want scheduled work periods for each employee to appear in a different color so that, for example, Peter Smith's schedule appears with a red background and Mandy Jones' schedule appears with a green background. Alternatively, you may want all schedules occurring in Classroom 1 to appear in yellow, whilst those in Classroom 2 to appear in blue. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Staff Members	By default, the Calendar will show all employee work schedules regardless of who the employee is. You may want to change this behavior so that, for example, only the schedule of a particular employee or group of employees is shown. Put a check mark against each Employee whose schedules you want to appear.

Locations	By default, the Calendar will show work schedules regardless of the Location. You may want to change this behavior so that, for example, only work schedules in Classroom 1 are shown, or Classrooms 1 and 2, but no others. Put a check mark against each Location that you want to appear.
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Hours Worked

Use the Hours Worked tab to further filter which information will be displayed in the Calendar - for example, you could set it temporarily to only show those hours worked by a particular employee.

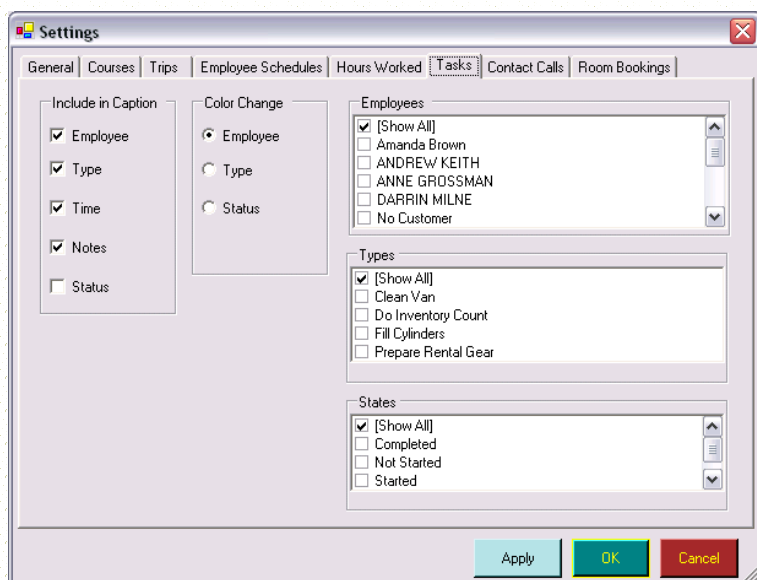


There are several sections:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want hours for each employee to appear in a different color so that, for example, Peter Smith's hours appear with a red background and Mandy Jones' hours appears with a green background. Alternatively, you may want all hours worked in one store to appear in yellow, whilst those in another store appear in blue. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Employees	By default, the Calendar will show all employee hours regardless of who the employee is. You may want to change this behavior so that, for example, only the hours of a particular employee or group of employees is shown. Put a check mark against each Employee whose hours you want to appear.
Store	By default, the Calendar will show hours worked regardless of the Store. You may want to change this behavior so that, for example, only hours worked at Store 1 are shown, or Store 1 and 2, but no others. Put a check mark against each Store that you want to appear.

Tasks

Use the Tasks tab to further filter which tasks will be displayed in the Calendar - for example, you could set it temporarily to only show Complete Inventory Count tasks that involved a particular employee, etc.

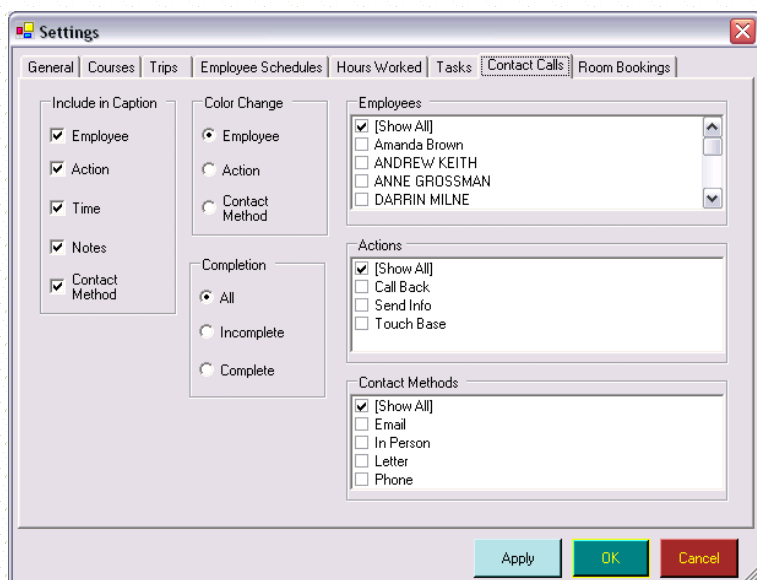


There are several sections:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want tasks for each employee to appear in a different color so that, for example, Peter Smith's tasks appear with a red background and Mandy Jones' tasks appear with a green background. Alternatively, you may want all tasks of one type to appear in yellow, whilst those of another in blue. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Employees	By default, the Calendar will show all employee tasks regardless of who the employee is. You may want to change this behavior so that, for example, only the tasks of a particular employee or group of employees are shown. Put a check mark against each Employee whose tasks you want to appear.
Types	By default, the Calendar will show all tasks regardless of what type of task it is. You may want to change this behavior so that, for example, only tasks associated with the store operations are shown or those associated with teaching and running trips are shown. Put a check mark against each Type of task you want to appear.
States	By default, the Calendar will show all tasks regardless of what state the task is in (i.e. Complete, Incomplete). You may want to change this behavior so that, for example, only incomplete tasks are shown. Put a check mark against each task State you want to appear.

Contact Calls

Use the Contact Calls tab to further filter which scheduled contact calls will be displayed in the Calendar - for example, you could set it temporarily to only show incomplete calls scheduled for a particular employee, etc.

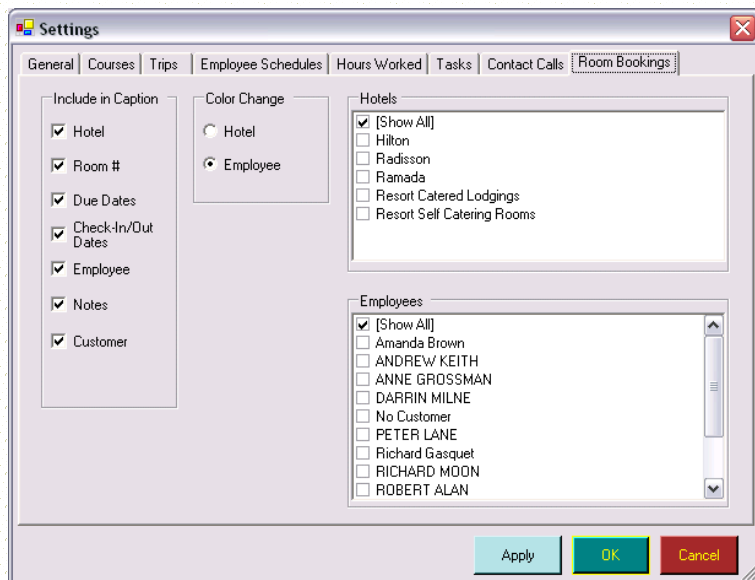


There are several sections:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want contact calls for each employee to appear in a different color so that, for example, Peter Smith's contact calls appear with a red background and Mandy Jones' contact calls appears with a green background. Alternatively, you may want all contact calls of one action type to appear in yellow, whilst those of another in blue. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Completion	By default, the Calendar will show contact calls whether they are complete or not. If you only want to see Complete contact calls, click on the Complete option in the Completion section. If you only want to see incomplete contact calls, click on the Incomplete option.
Employees	By default, the Calendar will show contact calls regardless of which employees are responsible. You may want to change this behavior so that, for example, only contact calls associated with a particular employee or group of employees are shown. Put a check mark against each Employee whose contact calls you want to appear.
Actions	By default, the Calendar will show all contact calls regardless of what action is required. You may want to change this behavior so that, for example, only callbacks are shown. Put a check mark against each contact call Action you want to appear.
Contact Methods	By default, the Calendar will show all contact calls regardless of what method is required. You may want to change this behavior so that, for example, only phone calls are shown. Put a check mark against each contact call Method you want to appear.

Resort Reservations

Use the Resort Reservations tab to further filter which bookings will be displayed in the Calendar - for example, you could set it temporarily to only show those bookings at the Hilton, etc.



There are several sections:

Include in Caption	Put a tick in a box in this section if you want the associated data to appear in each colored appointment box in the Calendar.
Color Change	You can decide how you want the colors to look on appointment boxes in the Calendar. For instance, you may want resort reservations at each Hotel to appear in a different color so that, for example, Hilton resort reservations appear with a red background and Radisson resort reservations appear with a green background. Alternatively, you may want resort reservations taken by Peter Jones shown in red while those booked by Mary Smith are shown in blue. Choose how you want the color change to occur by selecting the corresponding option in the Color Change section.
Hotels	By default, the Calendar will show resort reservations at all Hotels. You may want to change this behavior so that, for example, only resort reservations at the Hilton are shown, or Hilton and Radisson resort reservations, but no others. Put a check mark against each Hotel that you want to appear.
Employees	By default, the Calendar will show resort reservations regardless of which employees made the booking. You may want to change this behavior so that, for example, only resort reservations booked by a particular employee or group of employees are shown. Put a check mark against each Employee whose resort reservations you want to appear.

15.2 Calendar Views

15.2.1 Adding Calendar Appointments

To add information to the calendar, you can:

- ❖ Right mouse click on any date and select **New** (course, trip, day trip, etc) from the pop up option box. A new data item will be started and the start date will default to the date you right mouse clicked on.
- ❖ Double-click on an item of the same type (to open the item) and select **New** at the bottom of the pop up form. For example, you can select an existing course on the Calendar and click the **New Course button** at the bottom of the form to create a new one.
- ❖ Create a new data item from the appropriate module. For example, you can open the Trips module and create a new trip. It will automatically be added to the calendar.

To edit information on the calendar, you can:

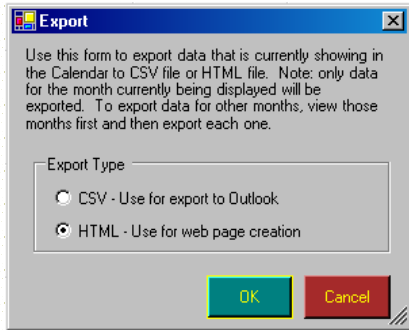
- ❖ Double-click on an item to open the item and edit the information directly in the pop up form.
- ❖ Find the data item from the appropriate module. For example, you can open the Trips module and find a specific trip. Any edits you make will be automatically displayed on the calendar.

15.2.2 Calendar Menu

Calendar Menu

Right click on the Calendar's background to show the Calendar menu.

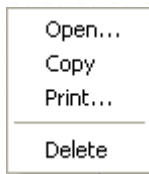


New ...	The top 8 items are covered above.
Paste	Click on Paste after copying an existing appointment to copy it to another day. For example, you could create a course and then right click on it in the Calendar, click Copy , then right click on a different day in the Calendar and click Paste . An exact copy of the course will be created starting on that day.
Export	<p>Data from the Calendar can be exported. When you click Export, the following form will be displayed:</p>  <p>Use the CSV option to create a Comma Separated file containing the calendar information. This is in a suitable format for importing into Microsoft Outlook. You could therefore use the Settings form to filter the calendar data to only show information relating to a particular employee, export the information to CSV and email the resulting file to the employee so he can import it into his Outlook schedule.</p> <p>Use the HTML option to create a file suitable for adding to your web site. For instance, you could use the Settings form to filter the calendar data to only show course and trip information, export it to HTML and add it to the web site so people can see your schedule. In addition, you can export to HTML and then use your browser's print option to print a hard copy of the calendar.</p>
Event Planner	Right click on a day that contains course or trip appointments and then click Event Planner to load those appointments onto the Event Planner. For example, if you have multiple boats at your resort, you could use this option to quickly load all of tomorrow's day trips/charters onto the Event Planner so you

	can assign divers to the appropriate boat.
Refresh	This option reloads all appointments for the current month onto the Calendar. You will only usually need to use this if you use EVE on multiple PCs and a user on a different PC has created a new course, trip, etc. while you already have the Calendar open. Click Refresh to make that new course/trip appear. Note: every time the Calendar is loaded and every time you display a different month in the Calendar, an automatic refresh is performed so you will rarely need to use this option.
Locked	Most appointments can be dragged from one day to another. For instance, if you have created an Employee Schedule for an employee and they cannot make it on that day, you can drag the schedule (by clicking and holding down the Left Mouse button on the appointment and dragging it) to a different day. Appointments can only be dragged once the Calendar has been Unlocked. Click on this option so that no tick appears next to it to unlock. This is the same as clicking on the Padlock icon at the bottom left of the Calendar.
Settings	This option does the same as clicking on the Settings button.

Appointment Menu

Right click on an appointment in the Calendar to show the Appointment menu.



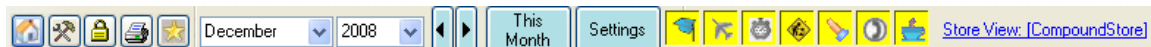
Click **Open** to open the detail form for the appointment.

Click **Copy** and then right click on the Calendar background on a different day and Paste to create a duplicate of the appointment on a different day.

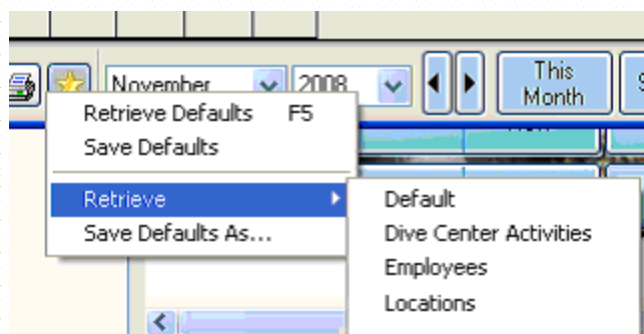
Click **Print** to print the appointment using one of the print layouts.

Click **Delete** to delete the appointment - you will need the requisite privilege before EVE will allow this.

15.2.3 Calendar Button Bar



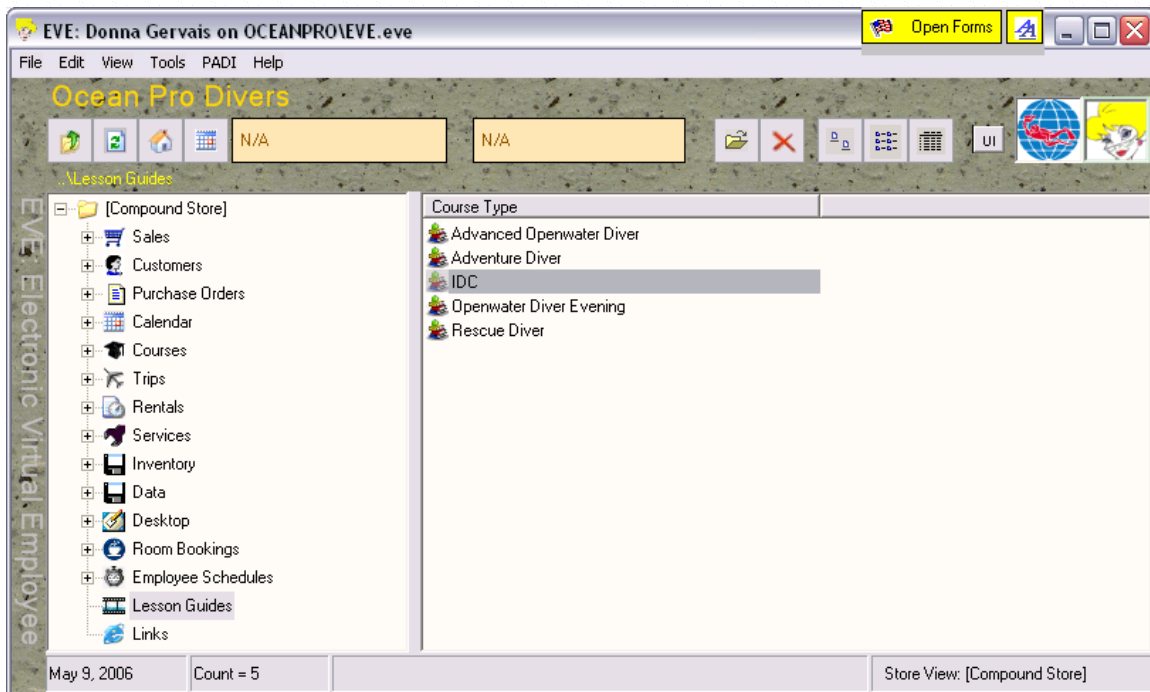
At the bottom of the Calendar is a bar with useful buttons on it. Click on the House icon to show the standard Windows menu so you can switch between open forms. Click the Options icon to show a popup menu that lets you save the size and position of the Calendar, open the Event Planner and Save the Store View (this is only applicable if you have multiple stores - it lets you save whether information from all stores or just the current store should be displayed in the Calendar). Click the padlock icon to lock/unlock the Calendar. Once unlocked, you can drag appointments about using your mouse to reschedule them. Click the printer icon to print the calendar. Click the Star (Defaults) icon to save or retrieve a set of Calendar settings. In this way you could have one set of Defaults that shows a Day View for each Employee and another set of Defaults that only shows one Day View. You can quickly switch between the views using the Defaults button.



16 LESSON GUIDES

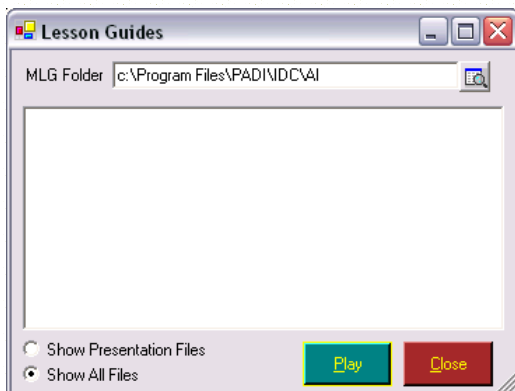
16.1 Introduction

If you have purchased one or more Modular Lesson Guides from PADI you can run them using the Lesson Guides module.



The list shows all course types that have a check mark in MLG? in the Course Types section of the Data Module (See Section 4.4.8.Course Types). Double click on a course type or right click on it and click Open MLG Folder.

Lesson Guides



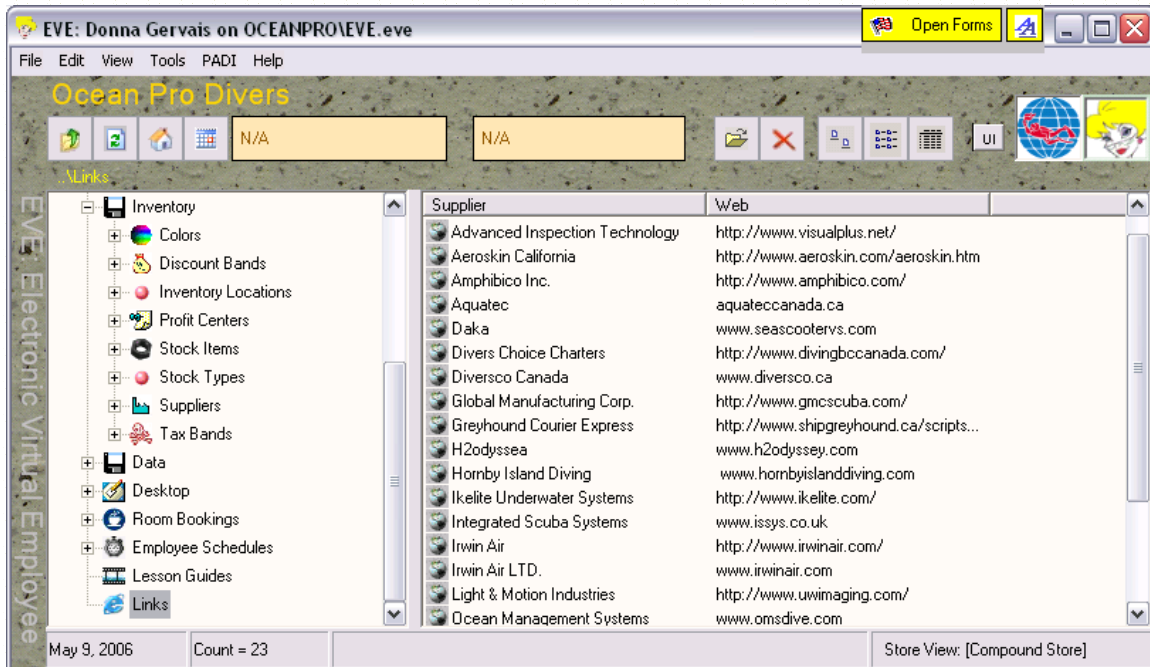
If you identified an MLG folder in Course Types, it will be displayed here. Otherwise, you can search for the folder by browsing your desktop.

The list box shows all MLG files in the folder. To show all files (not just MLG files) select Show All Files instead of Show MLG Files. To play an MLG, double click it or select it and click **Play**.

17 LINKS

17.1 Introduction

You can use the Links Module to get quick access to your supplier's websites. If you have identified a web address for a supplier (See Section 5.1.7. Suppliers), it will be displayed here.



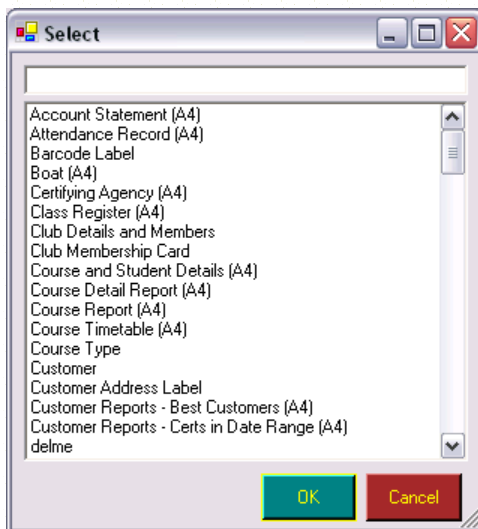
18 REPORTING

18.1 Print Layouts

Click **Tools** then **Print Layouts** on the main EVE form to change the formatting and contents of your print outs throughout EVE. For example, you can change how your invoices, gift certificates, quotes, rental bookings, etc. are printed. You can add/remove fields, change the font, colors, positions, add graphics, lines, etc.

18.1.1 Selecting a Print Layout

Choose the Print Layout you want to change from the pop up list box. Each of these Print Layouts come pre-defined with EVE and can be customized for your use. You can also create your own layouts if you have a specific reporting requirement.



When you click the **OK** button, the Layout form is loaded showing the print layout you selected.

18.1.2 Modifying the Print Layout

Layout

On the right of the form is a graphical representation of the print layout. Each turquoise box (called a 'field' in this description) represents a placeholder for an item of data on the report. For example, in the Course Timetable layout shown above, the CoName field represents how your Company Name will appear when a Course Timetable is printed. You can change the location of the field by clicking and holding down the Left Mouse button on the CoName box and then dragging the mouse. Release the Left Mouse button when you have reached the new position. When you next print a Course Timetable, the company name will print at the new location. Similarly, you can change other 'properties' of each field. The properties are described below. Fields can be made 'active' by clicking on them with your mouse. The active field has black squares at its extremities. In the figure above, the Title field is active. You can resize it by using the mouse to drag the black squares. Properties of the active field are shown in the Field Properties section on the left of the form, for example, Font Size, Alignment, etc.

There are 6 different types of field that can appear on the layout:

Label	When the report is printed, Label text appears just as it does on the layout. In the figure above, examples of Labels are 'Course #' and 'Start Date'. You can add as many Labels to your layout as you like.
Text	<p>Each Text field on a layout corresponds to a specific piece of information that EVE can print to the report. In the figure above, most fields are Text fields. When the Course Timetable described by the layout in the figure is printed, EVE replaces the 'Module' field with the actual name of the Module - for example, Classroom Session 1. The Module field describes how the module name will look (i.e. it describes the font size, position, etc).</p> <p>New Text fields cannot be added to the layout. EVE must know how to 'translate' each field - i.e. it needs to know what data to replace the field with. For example, there is no point in being able to create a 'Customer Salary'</p>

	field, as that type of data is not captured by EVE.
Graphic	You can add as many graphic fields to the layout as you like. A graphic field can be used to print your logo(s) or other static images. Each one can be as large or small as you like. Each graphic field must have a corresponding graphic file. There is one graphic field shown in the figure above displaying an image of EVE.
ImageFile	In some report layouts, you can add image files. These will display different images depending on which record is being printed. For example, if you print a customer record, you could add an ImageFile so the customer's image will be printed.
Line	You can add as many horizontal lines to the layout as you like. These can be used to separate different sections of the report. Lines can be 1 pixel high if you want to underline a section, or can be resized to a fixed height to, for example, put a border around some other text.
Ask Prompt	You can position Ask fields on the layout. When a report is printed, EVE will prompt you and you can enter some text at that time that will appear on the print out. The text is not saved anywhere - just printed. You could use this for ad-hoc information that is unknown until print time.
SQL	<p>You can position SQL fields on the layout. When a report is printed, EVE will run the SQL and print the results at the location of the SQL box. Only one value can be returned by the SQL. The SQL can reference other fields on the Layout, e.g. the following SQL would print the stock type of each stock item that appears on a Receipt.</p> <pre>SELECT Top 1 STStockTypeTx FROM T_STStockType INNER JOIN T_SIStockItem ON STStockTypeID = SISockTypeID WHERE SISockNoTx='[StockNo]'</pre> <p>To set the SQL, create a SQL box and then right click on it and click Edit SQL.</p>

The layout is broken into different 'sections'. Each section has a name at its top in double brackets, for example <<Report Header>>, <<Page Header>>, etc. Each section governs where on the report, the field(s) contained on it, are printed. Commonly used sections are described here.

Report Header	All fields that are in the <<Report Header>> section are printed at the top of the first page of the report. If the report extends to 2 or more pages, the report header fields only appear on page 1. You might want to put a report title and print date in the Report Header.
Page Header	All fields that are in the 'Page Header' section are printed on every page of the report. On page 1, the Page Header fields are printed beneath the Report Header fields. On subsequent pages, the Page Header fields are printed at the top of the page. You might want to put column titles in the Page Header section.
Line Items	All fields that are in the 'Line Items' section are printed beneath the fields in the Page Header section. This section contains the 'detail' of the report - for example, the individual line items on the quote. The section will be printed continuously (so that one line item prints beneath another) until all line items on the quote have been printed. If the bottom of the page is reached, the section will continue where it left off on page 2, then page 3, etc. Of course, on subsequent pages the Page Header will first be printed, and then the Line Items. You might want to put fields representing the Item Description,

	Quantity, etc. in the Line Items section.
Page Footer	Fields in the 'Page Footer' section will be printed at the bottom of every page. You might want to put Page Number, etc. in the Page Footer section.
Report Footer	Fields in the Report Footer section will be printed beneath the Grand Total.

Other sections may be used depending on which print layout you are viewing.

Beware when dragging fields from one section to another. For instance, it would make no sense to drag the Title Text field into the Line Items section as this would force the report title to print once for every line item on the print-out. Usually, you would only want to move fields between the Report Header, Page Header, Page Footer and Report Footer sections.

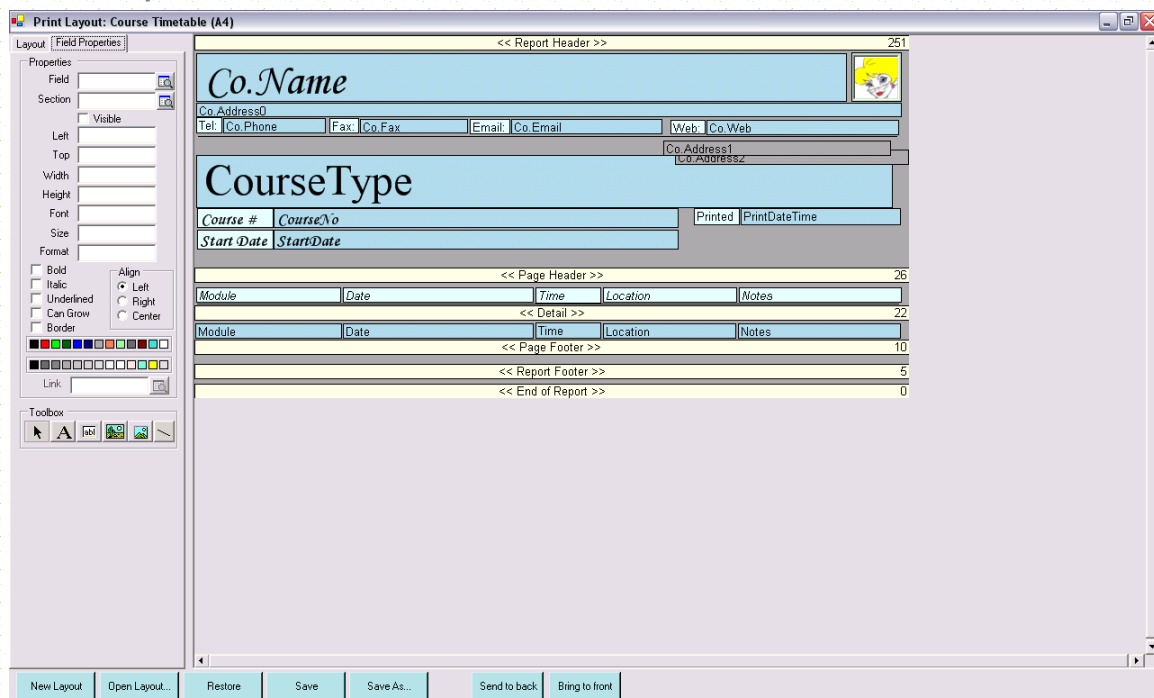
To the left of the layout area are the Layout and Field Properties tabs. The Layout tab shows which print layout you are modifying and the type of report it relates to - both are read-only. You can have multiple print layouts defined for a single report type - for instance the 'Invoice' report type has 2 layouts defined by default called Receipt (A4) and Receipt (Paper Roll 3"). You can choose which layout to use when you print an invoice. The Paper Size field can be used to indicate the type of paper the report is intended for - when you change the value you will see the dimensions of the layout section change. Click on the button to show the pop up list of available sizes. If the size you use is not listed, click on the **New Paper Size button** on the popup list to add it. The Default Destination field indicates how the report will be printed by default, i.e. whether the default behavior is to send it to the Printer, the Screen, Microsoft Word or Email. Most reports will use the Printer option, but you could use the Screen option if you usually just need to see the report on screen and don't need a hard copy. If you need to save the report to a file, consider using the Microsoft Word option. Some reports may be emailed by default - for instance, if most of your account holders have an email address, you may choose to email them the monthly account statements.

Set a value for the Default # of Copies if you wish. The default value is 1 but some reports may work better if you increase the value. For example, when printing receipts you may want to print one copy for the customer and one for your records.

Put a check mark in the Landscape box if you want the report to print across the page, so it is wider than it is high. Otherwise the report will print in Portrait form, higher than it is wide.

Use the Zoom option to make the layout on the right hand side of the form smaller or larger.

Field Properties








When you make a field active by clicking on it, all properties of the field are shown in this frame. Different field types have different properties:


Property	Applies To	Description
Section	All Field Types	Read-Only: this indicates which section the field is in. The value is updated by EVE if you drag a field from one section to another.
Visible	All Field Types	Indicates whether the field will be visible when the report is printed. You can choose to delete fields (by making them active and then pressing the Delete key on your keyboard - not recommended) or make them invisible (recommended). Invisible fields still show on the layout form (with a green background rather than turquoise) so you can make them visible again if you wish later.
Left	All Field Types	The horizontal offset from the left of the page where the field will be printed. The units are measured in hundredths of an inch. For example, if you are using a paper size that is 4 inches wide for your receipts, a field with a Left value of 200 will start printing in the middle of the paper horizontally.
Top	All Field Types	The vertical offset from the top of the page where the field will be printed. The units are measured in hundredths of an inch, so if a field has a Top value of 100, the top will be printed an inch from the top of your report. Note: some printers do not print right up to the

		edge of the paper so there may be a slight variation in the offset.
Width	All Field Types	The width of the field in hundredths of an inch. If the text in a Label or Text field does not fit in the Width supplied, the text will be truncated unless the Can Grow property is set - see below.
Height	All Field Types	The height of the field in hundredths of an inch.
Font	Label, Textbook	The font name, for example, Arial, Times New Roman. You can choose from a list of all fonts currently installed on your PC. Note: the print layout is saved to the database and will be used to print reports on all PCs on a network. You may have a font installed on the PC where you save a new print layout that is not installed on a different PC where you print the report. In this case Windows will use the nearest matching font that is installed on that PC.
Size	Label, Textbook	The font size to use.
Format	Label, Textbook	Some text (for example, Phone numbers, and dates) can be formatted to appear differently. For example a date may be formatted to appear as '10 th January 2003' or '10 Jan 03', etc. You can specify a format to apply to the field. Please contact EVE Diving if you have a particular format you need to use.
Bold	Label, Textbook	Indicates whether the font will appear Bold or Normal
Italic	Label, Textbox	Indicates whether the font will appear <i>Italicized</i> or Normal.
Underlined	Label, Textbox	Indicates whether the font will be <u>underlined</u>
Can Grow	Label, Textbox	If this option is not checked, any text that does not fit into the space allotted by the field width will be truncated. If the option is checked the field will expand in height so that all text can be shown. The width will not be affected.
Align	Label, Textbox	This can be one of the following values: ❖ Left Aligned ❖ Right Aligned ❖ Center Aligned
Color	Label, Textbox, Line	Click on one of the color boxes to change the color of the field. Note: Line fields will always appear black on the print layout form regardless of which color you click on. However, when the report is printed the correct color will be used

Filename	Graphic	Indicates the filename of the graphic to show.
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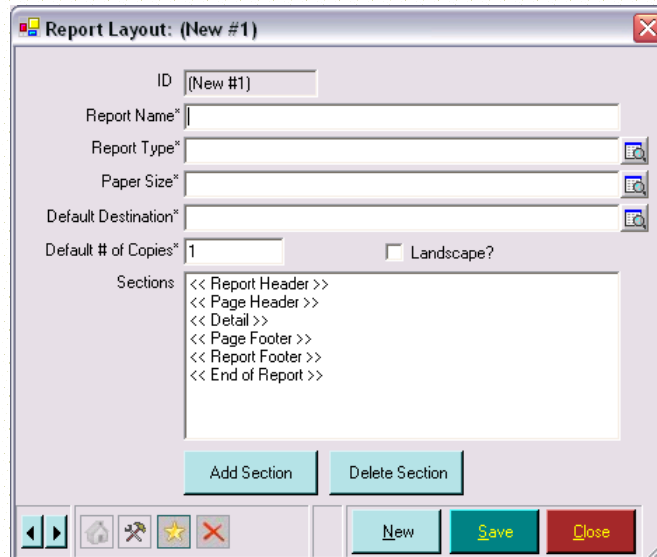
If you want to add a new field to the print layout, first click on the appropriate 'tool' in the Toolbox and then move your mouse onto the layout to the right. Click and hold down the Left Mouse button at the top left of the position you want the new field to appear. Drag the mouse down and to the right and release the Left Mouse button at the bottom right position. A new field will appear. You can then set its properties.

- ❖ To create a new Label field, use the  tool.
- ❖ To create a new Text field, use the  tool.
- ❖ To create a new Graphic field, use the  tool.
- ❖ To create a new Image field,  use the tool.
- ❖ To create a new Line field, use the  tool

The tool will stay active until you replace it with a different one. This means a new field will be created each time you click on the layout area. To prevent this from happening click on the Select tool .

At the bottom of the form are 7 buttons:

Restore Defaults	Factory	If you make a lot of changes to a layout and then realize you made a mistake and want to start again, click this button. The default fields with default properties will be reloaded from file.
Send to Back		If 2 or more fields overlap you can use this button to send the active field behind all overlapping ones
Bring to Front		If 2 or more fields overlap you can use this button to bring the active field in front of all overlapping ones
New Layout		Click this to create a new print layout. You will not usually need to do this. The following screen will appear.



Report Type: Pick the report type from the popup list, e.g. Invoice, Rental Booking, etc.

	<p>Paper Size: Choose the size of paper the report will print on from the popup list</p> <p>Default Destination: one of Email, Printer, Screen, Word for Windows</p> <p>Default # of Copies: the default number of copies when printed</p> <p>Sections: this lists the report sections that will be created when you save the new record.</p>
Open	Click this to open an existing print layout. EVE will prompt you to save changes if you have made any.
Save	Click this to save any changes you have made to the print layout. The changes are saved to the back end database and so will affect the printing of the associated report on all PCs that use the database.
Save As	Click this to create a copy of the active layout with a different name.

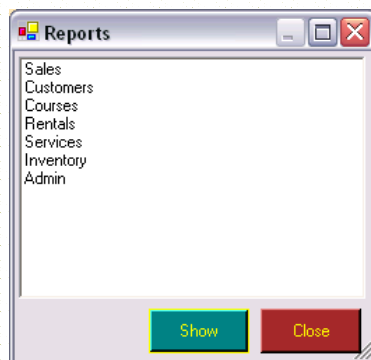
Field Descriptions

CoAddress0	Report Header	Full company address. This is taken from data in the Stores section of the Data Module
CoName	Report Header	Name of your store. This is taken from the Stores section of the Data Module
CustAccRec	Report Header	Customer's Accounts Receivable Balance i.e. the amount owed by or to the customer
CustHomeAddress	Report Header	Customer's address
CustName	Report Header	Customer name
CustTelHome	Report Header	Customer's home phone number
Employee	Report Header	Employee responsible for the transaction
PrintDate	Report Header	Date the transaction was printed.
PrintDateTime	Report Header	Date and Time the transaction was printed
CoEmail	Page Footer	Your store's email address. This is taken from the Stores section of the Data Module
CoFax	Page Footer	Your stores Fax number. This is taken from the Stores section of the Data Module
CoPhone	Page Footer	Your store's telephone number. This is taken from the Stores section of the Data Module
CoSlogan	Page Footer	A slogan to appear on the transaction. This can be any text you like for example, As seen on TV or No refunds, etc. This is taken from the Stores section of the Data Module
CoWeb	Page Footer	Your store's Web site address. This is taken from the Stores section of the Data Module
Page <X>	Page Footer	Page number

CoRegNo		Your store's Company Registration number. Taken from the Cost Centers section of the Data Module
CoTaxRegNo		Your store's Company Tax Registration number. Taken from the Cost Centers section of the Data Module
CoStoreNo		Your store's PADI store number. Taken from the Stores section of the Data Module

18.2 Reports

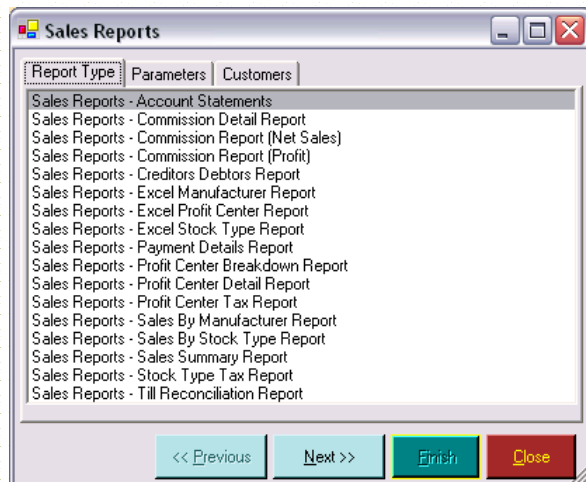
EVE comes pre-configured with a number of reports that you will find useful in managing your business. These reports can be accessed from the Reports item under the **File** menu.



Select the report type you would like to access from the Reports list and click **Show**.

18.2.1 Sales Reports

Report Type



Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

A/R Aging	This report shows outstanding customer accounts receivable balances group into time periods of 30 days (by default). You can use it to see at a glance which
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	customers have owed you money for an extended period of time.
Account Statements	This report shows the account history for all open accounts that have had activity during the period you define. Details include Purchases Made, Payments Made, current amount due and payment due by date. You can send this to account holders, for example, at the end of every month. The report can be printed and sent through the post or emailed straight from EVE.
Charts	This report lets you produce Bar and Pie charts for all sales in a specified period - i.e. not just for a particular stock type, manufacturer or stock item
Commission Detail Report	This report shows details of the invoices that contribute to the commission earned by an employee that you select. Details listed are date/time, invoice number, customer, net sales, commissionable net sales (i.e. the sum of the items on the invoice after the commission rate applicable for each stock item has been applied).
Commission Report (Net Sales)	<p>This lists all employees, the net sales each has been responsible for and the total commission due. Each employee and each stock item has a Commission Rate assigned to them. The Net Sales Commission figure is calculated by the following formula:</p> $(\text{Employee commission rate}) * (\text{Stock Item commission rate}) * (\text{Price at which the Stock Item was sold [including any discounts applied]})$ <p>For example:</p> <ul style="list-style-type: none"> ❖ Employee X has a Commission Rate of 5% ❖ Stock Item Y has a Commission Rate of 3% ❖ The Retail Price (before tax) of Stock Item Y is \$100 ❖ Employee X sells 2 units of Stock Item Y applying a 10% discount (i.e. the price before tax = $2 * 90 = \\$180$) ❖ Net Sales Commission due on the sale is $(5/100 * 3/100 * 180) = \\0.27 <p>NOTE: Some customers are not 'commissionable'. For example, if an employee sells himself a wet suit he is probably not due any commission on the sale. See Customers for more information (See Section 7.1.New Customer).</p>
Commission Report (Profit)	<p>This report is very similar to the one above. However, instead of showing net sales and the commission on those sales, it shows net profit and the commission due on the profit. You can choose which report to use when calculating employee commission.</p> <p>The Profit Commission figure is calculated by the following formula:</p> $(\text{Employee commission rate}) * (\text{Stock Item commission rate}) * (\text{Net Profit}).$ <p>Where Net Profit is calculated by the following formula:</p> $(\text{Quantity sold}) * [(\text{Retail Price before tax}) - (\text{Cost Price before tax})]$ <p>For example:</p> <ul style="list-style-type: none"> ❖ If the Cost Price of Stock Item Y is \$50, the profit on the sale used in the previous example is: $(2 * [90 - 50]) = \\$80$ ❖ The Profit Commission due on the sale is $(5/100 * 3/100 * 80) = \\0.12
Creditors Debtors	The parameters and period section are ignored for this report. It lists all people

Report	<p>who owe, or who are owed, money.</p> <p>Lines shown in red indicate money owed by the customer; lines in blue indicate money owed to the customer. The Credit column indicates the amount (positive values indicate money owed by the customer; negative values indicate money owed to the customer).</p> <p>By default, both creditors and debtors are shown. Uncheck either of the check boxes at the bottom of the form to remove associated records from display.</p> <p>Details of individual accounts are shown. Therefore, if a customer has two accounts that both have a non-zero balance, two rows will be shown for that customer.</p> <p>Click the Export button to send the data to EVE'S standard Export module (See Section 18.5.Exports). You might want to do this, for example, in order to email debtors that payment is due.</p> <p>Click Open to view details of the selected Account.</p>
Excel Manufacturer Report	Use this report to export sales data to Microsoft Excel for a fixed time period. In Microsoft Excel you will get one worksheet for each Manufacturer whose products you sold in the period. There will be one row for each invoice line item. In addition, the first sheet will show a summary of the amounts on each subsequent worksheet.
Excel Profit Center Report	Use this report to export sales data to Microsoft Excel for a fixed time period. In Microsoft Excel you will get one worksheet for each Profit Center in which sales were made in the period. There will be one row for each invoice line item. In addition, the first sheet will show a summary of the amounts on each subsequent worksheet.
Excel Stock Type Report	Use this report to export sales data to Microsoft Excel for a fixed time period. In Microsoft Excel you will get one worksheet for each Stock Type in which sales were made in the period. There will be one row for each invoice line item. In addition, the first sheet will show a summary of the amounts on each subsequent worksheet.
Open Invoices	Use this report to show a list of invoices put on an in-store account that are still unpaid.
Payment Details Report	This lists all payments made in the period, grouped by payment method. The following information is shown: Payment Method, Number (i.e. check number, credit card number, etc.), Invoice Number, Payment Type (always Regular Payment in this version of EVE) and Amount.
Profit Center Breakdown Report	<p>This gives a summary of your sales in the period, broken down by Profit Center. The report shows the net sales, tax, gross sales and COGS (Cost of Goods Sold) for each Profit Center.</p> <p>Profit Centers appear in the Memo section underneath the main report if they have a checkmark in the Appear in Profit Center Breakdown Report's Memo Section box on the Profit Center form (See Section 5.1.4.Profit Centers).</p>
Profit Center Detail Report	This report shows details of all items sold that fall within the profit center selected in the date range selected. First select a profit center in the Profit Center pop up list box, choose the date range you are interested in and then run the report. Details shown are date, invoice number, stock type, stock item, COGS (Cost of Goods Sold), price, tax and total. You can run the report without

	first selecting a profit center, but be prepared for a lot of data!
Profit Center Tax Report	This report shows taxable and non-taxable sales and tax collected for each tax band by profit center for the time period you identify.
Sales By Manufacturer Report	This shows the net sales and Cost of Goods Sold in the period grouped by Manufacturer
Sales By Stock Type Report	This shows the net sales and Cost of Goods Sold in the period grouped by Stock Type
Sales Summary Report	Use this report to export sales data to Microsoft Excel for a fixed time period. The data will include one row in Microsoft Excel for each stock item on file (whether it was sold in the period or not). There is a column that indicates the number of units of each stock item sold - it will be blank if none were sold.
Stock Type Tax Report	This report shows taxable and non-taxable sales and tax collected for each tax band by stock type for the time period you identify.
Till Reconciliation Report	This gives a summary of the money taken in the period, broken down by payment method. The report has 2 sections for payments (i.e. money taken on invoices) and refunds (i.e. money paid on refunds).

Parameters

Sales Reports - Excel Stock Type Report

Report Type: Parameters

Period

In Year: 2006

☒ From the Start of the Day
☐ From the Start of the Week
☐ From the Start of the Month
☐ From the Start of the Year
☐ Yesterday
☐ Last Week
☐ Last Month
☐ Last Year
☐ Specify Range

From Start of: April 19, 2006

To End of: April 19, 2006

Store: Ocean Pro Adventures Ltd.

Cost Center:

Profit Center:

Employee:

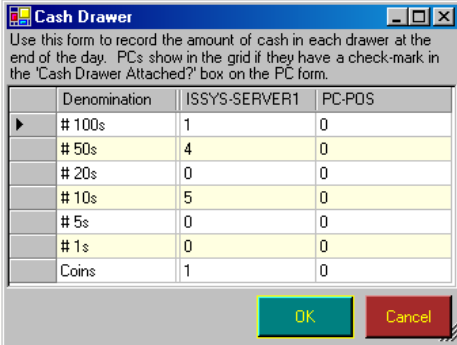
PC:

☐ Show Pie Chart ☐ Show Cash Drawer Form

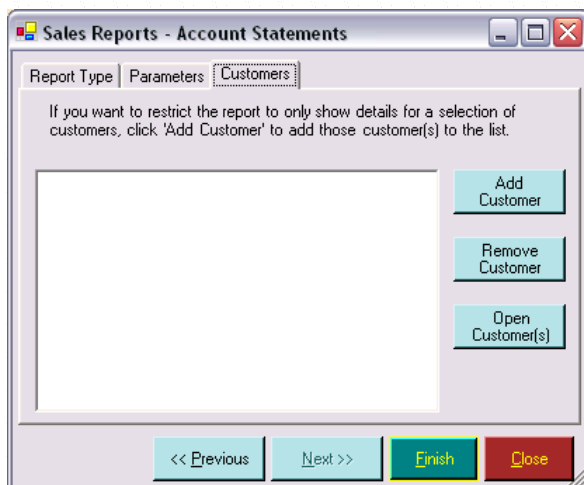
<< Previous Next >> Finish Close

Select the Parameters to narrow the results of your query.

Period	<p>Use the Period section to define the timescale, over which, data is included in the report.</p> <p>Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.</p>
---------------	--

Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report
Cost Center	Choose a Cost Center from the pop up list box so that only data relating to the chosen cost center is included in the report
Profit Center	Choose a Profit Center from the pop up list box so that only data relating to the chosen profit center is included in the report
PC Name	Choose a PC Name from the pop up list box so that only data relating to the chosen PC (i.e. point of sale) is included in the report
Employee	Choose an Employee from the pop up list box so that only sales created by the chosen employee are included in the report
Show Pie Chart	Tick this option if you want to see a pie chart in addition to the raw numbers. EVE will print the standard report first and then the pie chart.
Show Cash Drawer Form	<p>This is only applicable to the Till Reconciliation report. If you put a check mark in the box and then run the Till Reconciliation report, EVE will prompt you to enter the number of bills in the cash drawer of each denomination.</p>  <p>One column will be shown in the grid for each PC that has a check mark in the <i>Cash Drawer Attached</i> checkbox on the PC form (See Section 4.4.27.PCs).</p> <p>EVE will write these values to the report.</p>

Customers



Sales Reports - Account Statements

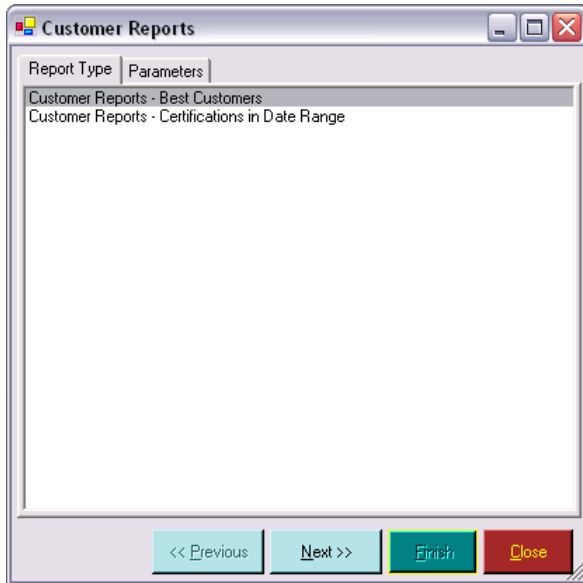
Report Type | Parameters | **Customers**

If you want to restrict the report to only show details for a selection of customers, click 'Add Customer' to add those customer(s) to the list.

This option is not available for all reports. Use the **Add Customer button** if you only want to include the sales of specific customers in the report. Highlight a customer and click the **Remove Customer button** to exclude a previously selected customer from the report. To review or edit customer information, click the **Open Customer button**. If no customers are in the list, sales information for all customers is included in the report.

18.2.2 Customers Reports

Report Type



Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Best Customers		This report shows your top purchasers for a specified time period. Net purchases, gross purchases, email and phone number are included.
Certifications Date Range	in	All customers who have participated in a course during a specified time period are displayed along with the course type and number, the certification date, the instructor and the status.

Parameters

Select the Parameters to narrow the results of your query.

Period	Use the Period section to define the timescale, over which, data is included in the report. Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.
Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report
Top Customers	Identify how many customers you want to appear in the report results (Available only for Best Customers). For example, if you want to see your best 100 customers, enter the number 100.

18.2.3 Courses Reports

Report Type

Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Course Details Report	This report is similar to the Course Report below except that it also lists each customer registered on the courses.
Course Report	This report lists all courses that are taking place between 2 dates that you

	provide. You can choose to run the report for a particular instructor or for all instructors. You can also choose whether to run the report for a particular course type or all course types.
Enrollments by Month	This report shows the number of students registered on different courses in a specified year.
Instructor Invoice Report	<p>Instructors can use this report as an invoice to give to the store owner. The report shows a breakdown of all modules and costs on the courses that they taught in the date range selected.</p> <p>Instructors will use this report if, instead of being paid for each course, they are paid per week /month for all the modules they taught. Two prompts are shown so you can pick the instructor and enter the date range. A breakdown is shown of all modules the instructor taught in the period, with associated costs.</p>

Parameters

Course Reports: Course Detail Report

Report Type: Parameters

Period

In Year: 2006

☐ From the Start of the Day
☐ From the Start of the Week
☒ From the Start of the Month
☐ From the Start of the Year
☐ Yesterday
☐ Last Week
☐ Last Month
☐ Last Year
☐ Specify Range

From Start of: April 1, 2006

To End of: April 30, 2006

Employee: [Show All]

Course Types

☒ [Show All]
☐ Advanced Open Water Diver
☐ Adventure Diver
☐ Altitude Diver
☐ Atlantis/Dolphin Rebreather
☐ Basic Scuba
☐ bbbc
☐ bbbd
☐ Bloodbourne Pathogens Awareness
☐ Boat Diver

<< Previous Next >> Finish Close

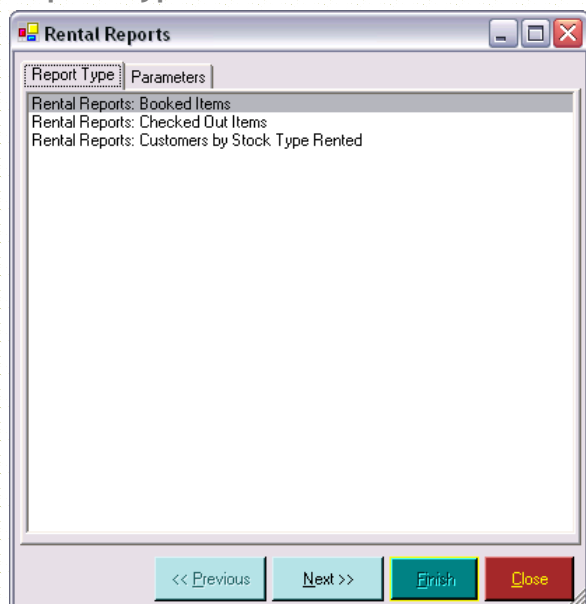
Select the Parameters to narrow the results of your query.

Period	<p>Use the Period section to define the timescale, over which, data is included in the report.</p> <p>Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.</p>
Employee	Use the employee to limit the course reports to courses run by a specific instructor.

Course Types	Use the Course type to filter the report for only those course types which you are interested in.
---------------------	---

18.2.4 Rentals Reports

Report Type



Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Booked Items	<p>Used the Booked Equipment report to load a form similar to the Checked Out Items report below. This time, items that are booked out between the specified dates are shown. Click on the Export button to load the standard Export form (See Section 18.5.Exports). You could use this to send a list of all the equipment booked for the coming weekend to Microsoft Excel, so you can print it out.</p>
Checked Out Items	<p>The grid lists all rental booking items that have a Checked-Out date but no Checked-In date. Items are shown in red if the Due End Date is in the past - i.e. they are overdue.</p> <p>You can check-in items from this screen using the Check-In button. All items that have a checkmark next to them will be checked in. If a Penalty Charge is shown, EVE will create a rental booking containing the penalty payment under the name of the customer on the booking that is late. You will need to add this to an invoice if you want to claim the payment. You can change the penalty amount on this form by clicking once on the Penalty Charge column and then clicking again a couple of seconds later - do not double click as this will show the detail form instead.</p> <p>Click the Import from CSV button if you have a barcode device that allows barcodes to be stored on it. In this case, you can scan the barcode of each item returned, dock the device to your PC and then upload the barcode information onto the Check In form. EVE will use the barcodes to find and check in those items. You will then be left with any outstanding items showing in the list</p>

Customers by Stock Type Rented

Periodically you may want to contact people who frequently rent equipment to see if they want to purchase it instead. You can use the 'Customers by Equipment Type' option to find people who have rented particular types of equipment and the amount they have spent on rentals.

Parameters

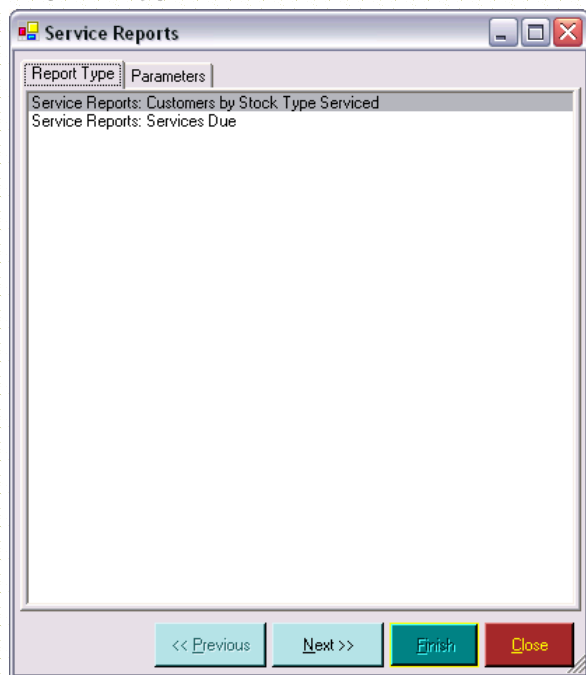
The screenshot shows a software window titled "Rental Reports: Booked Items" with a "Parameters" tab selected. The "Report Type" is set to "Parameters". The "Period" section includes a date picker for "In Year" set to "2006". Below this are radio buttons for "From the Start of the Day", "From the Start of the Week", "From the Start of the Month", "From the Start of the Year", "Yesterday", "Last Week", "Last Month", "Last Year", and "Specify Range". The "Specify Range" option is selected, with "From Start of" and "To End of" both set to "April 26, 2006". Below the "Period" section are three text boxes for "Store" (containing "Ocean Pro Adventures Ltd."), "Stock Type", and "Manufacturer", each with a search icon. At the bottom are four buttons: "<< Previous", "Next >>", "Finish", and "Close".

Select the Parameters to narrow the results of your query.

Period	Use the Period section to define the timescale, over which, data is included in the report. Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.
Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report
Stock Type	Choose a Stock Type from the pop up list box so that only data relating to the chosen Stock Type is included in the report.
Manufacturer	Choose a Manufacturer from the pop up list box so that only data relating to the chosen Manufacturer is included in the report.

18.2.5 Services Reports

Report Type



Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Customers by Stock Type Serviced	This report displays customers who have had a specific type of equipment serviced and the amount they have spent on the service during a specified time period.
Services Due	<p>Use this option to get a list of equipment items that require a service within the date range specified.</p> <p>By default, both rental equipment and equipment owned by customers are shown. Check the appropriate boxes on the parameters tab to include the information you want.</p> <p>Click Export to send the data to the standard Export form. You could then send an email or a letter to those people whose equipment needs to be serviced.</p>

Parameters

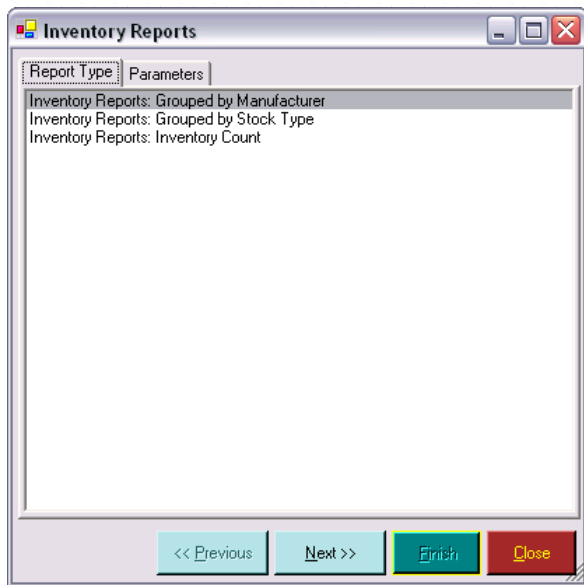
The screenshot shows a software window titled "Service Reports: Customers by Stock Type Servi...". Inside, there's a "Parameters" tab. Under "Period", there's a section for "In Year" with a dropdown set to "2006". To the right are radio buttons for "From the Start of the Day", "Week", "Month", "Year", "Yesterday", "Last Week", "Last Month", "Last Year", and "Specify Range". Below these are "From Start of" and "To End of" date pickers, both set to "April 26, 2006". Further down are text boxes for "Store" (containing "Ocean Pro Adventures Ltd."), "Stock Type", and "Manufacturer". At the bottom are two checked checkboxes: "Include Rental Equipment" and "Include Customer Equipment". Navigation buttons at the very bottom are "<< Previous", "Next >>", "Finish", and "Close".

Select the Parameters to narrow the results of your query.

Period	Use the Period section to define the timescale, over which, data is included in the report. Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.
Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report
Stock Type	Choose a Stock Type from the pop up list box so that only data relating to the chosen Stock Type is included in the report.
Manufacturer	Choose a Manufacturer from the pop up list box so that only data relating to the chosen Manufacturer is included in the report.
Include Rental Equipment	Use the Include Rental Equipment and Include Customer Equipment boxes to define which equipment owners you wish to include in the list. For example, on the Services due report, you may wish to only include customer equipment and then send an email to all customers with outstanding service requirements.
Include Customer Equipment	

18.2.6 Inventory Reports

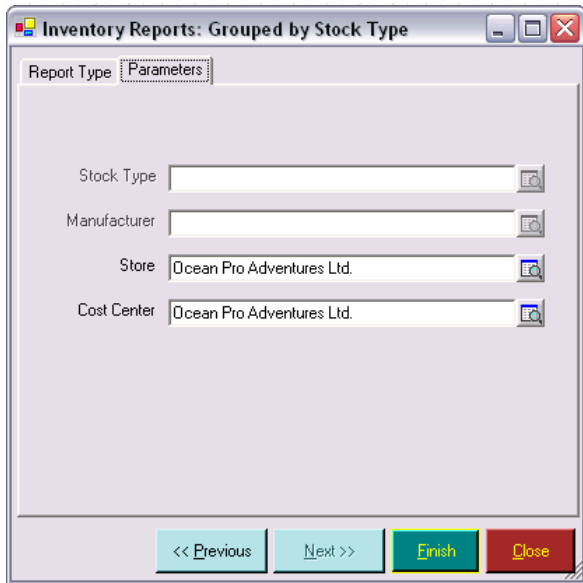
Report Type



Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Grouped by Manufacturer	This report displays your inventory summarized by Manufacturer. Each row contains a summary of the stock items for the manufacturer.
Grouped by Stock Type	This is an inventory summary report. Each row contains a summary of the stock items for the stock type
Inventory Count	Use this report to assist you in counting your inventory process. Each stock item (with stock type, manufacturer and stock number) is displayed along with the number that EVE currently thinks are in stock. Record the new number in stock for each item after you have counted the physical inventory in your storeroom. To speed this process, if you have a device that allows barcodes to be scanned and saved (contact EVE Diving for details), you can scan the barcodes of items in stock, dock the device to your computer and use the Import from CSV button on the Inventory Count form to upload the stock level information onto the report. EVE will automatically calculate the difference between the existing and new stock levels. Once you have completed your inventory count, click Save to commit the new stock levels to the database.

Parameters

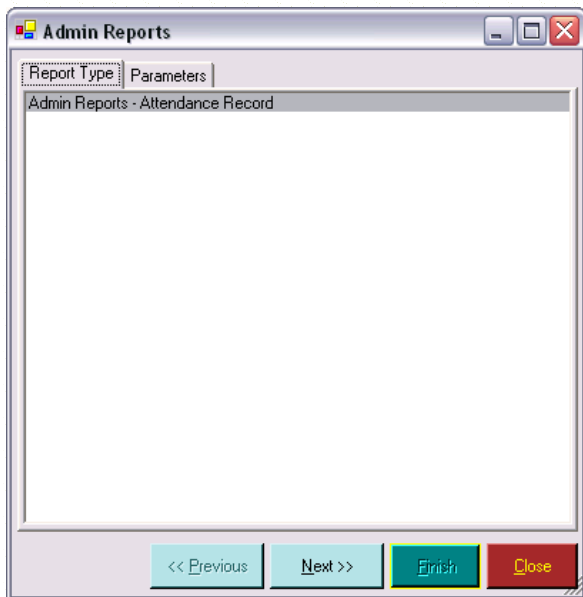


Select the Parameters to narrow the results of your query.

Stock Type	Choose a Stock Type from the pop up list box so that only data relating to the chosen Stock Type is included in the report.
Manufacturer	Choose a Manufacturer from the pop up list box so that only data relating to the chosen Manufacturer is included in the report.
Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report
Cost Center	Choose a Cost Center from the pop up list box so that only data relating to the chosen cost center is included in the report

18.2.7 Admin Reports

Report Type

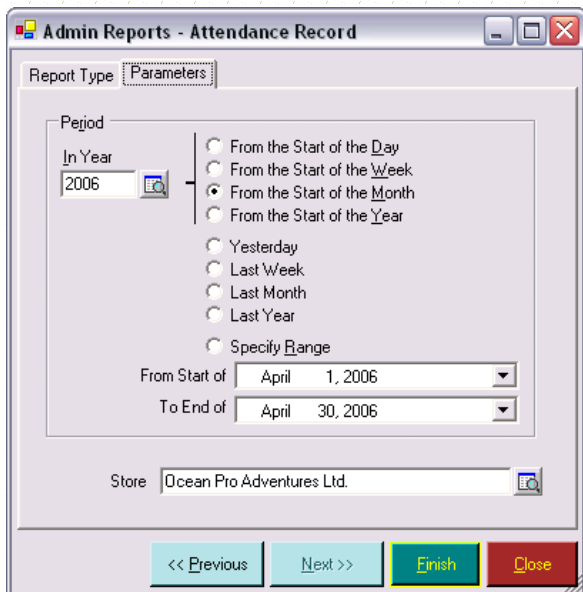


Select the Report you wish to produce from the Report Type list. A full description of reports is found below.

Attendance Record

The hours worked of each employee are shown along with clock on and clock off times. You can use this to calculate employee pay.

Parameters



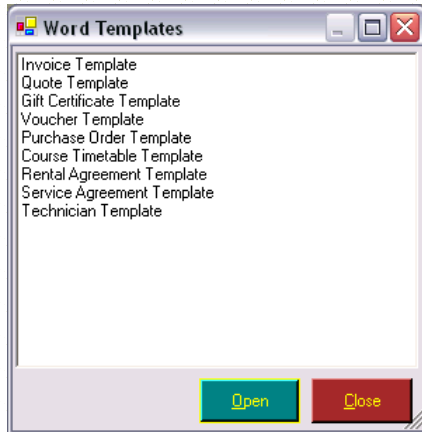
Select the Parameters to narrow the results of your query.

Period

Use the Period section to define the timescale, over which, data is included in the report.

	Choose 'Specify Range' and enter 2 dates if you want to view a report for a specific date range.
Store	Choose a Store from the pop up list box so that only data relating to the chosen store is included in the report

18.3 Word Templates



Click this to show a form that lists all Word templates that EVE uses - for example, Invoice template, Course Timetable template, etc. These are the documents that will be used when you print information to Microsoft Word. This is most useful if you want to save and/or email a report to someone.

This is less important than in previous versions of EVE as, in EVE version 5 and later, you can save print-outs to JPEG image files, which is a much faster option.

Select a template in the list and click **Open** to show the template in Microsoft Word. Edit as you see fit and save the document.

Invoice Template	This is the standard EVE invoice that includes all items in the shopping basket, totals by item and for the full invoice and payment methods.
Quote Template	Similar to the invoice, the quote includes all stock items in the shopping basket along with totals, however, payment information is not included.
Gift Certificate	Use this template to print gift certificates for customers. Lines for staff signature and date are provided
Voucher	Use this template to print credit vouchers for your customers. Room for a staff signature and date is provided.
Purchase Order	A Purchase Order suitable for faxing to your suppliers is provided.
Course Timetable	This template summarizes course module, start / end time, location and instructor for a specific course. Use it to provide course details for a customer.
Rental Agreement Template	This template is used when a customer rents equipment from you. It should be edited to ensure the language meets your specific dive center's requirements.
Service Agreement Template	Use this template to print the service agreement that the customer must sign along with details of each item to be serviced and the work required.
Technician	This template is used to summarize the work required by technician. Use it to

18.4 Search Wizards

A number of search wizards are available to help you mine your database and find customers, invoices, Purchase Orders or inventory that meet specific criteria. Each wizard is described below; however, all of the wizards have some common features.

Entering Criteria

Criteria can be entered into one or more fields on each tab within a wizard to perform a search for the sub-set of data on the database that match the criteria. Fields are displayed in turquoise until you enter search criteria at which time they turn to bright yellow. When you are satisfied with your criteria, click the **Search button** to instruct EVE to perform the search. The results tab displays the results of your search.

The **Clear button** becomes available when you are in the Wizard. Click on it to clear all search-criteria and the results grid. The button has no effect on data in the database - it simply clears previously entered search criteria from the screen. Click on the **Search button** again after clearing the criteria to show all the data held on the database (not recommended if you have a large database).

You can enter criteria into controls on any of the tabs, or on a combination of tabs. If more than one criteria type is set, the data that matches all criteria will be returned.

Click the **Next button** to go to the next page and the **Previous button** to go back a page.

Wildcards

Some fields require an exact match before the data will be found. Other fields will allow you to search on close data matches. These fields are marked as follows:

- ❖ A* - Match start of field
- ❖ *A - Match end of field
- ❖ A - Match any part of field
- ❖ A - Exact Match

The wildcard characters *, >, <, >=, <= can be used in some text boxes. If you use a wildcard character it overrides the wildcard control described above. A wildcard can be used to match against several records in the following way:

- ❖ Use * to match any combination of characters. Thus, entering Sm* as a criterion in the Last name field will match against all people whose last name starts with 'Sm', for example, Smith, Small, Smart, etc. The wildcard could be placed at the start, (for example, *son will find all people whose name ends with 'son', for example, Anderson, Patterson, Robinson, etc.) or in the middle, (for example, Cha*ell will find Chappell, Channell, etc). If you enter * alone in a text box, all people that have any data at all in that field will be found. You may want to do this, for example, to find those people who have an email address specified. Conversely, if you enter "" (i.e. open and close double-quotes with nothing in-between) in a text field then only people who have no data specified in that field will be found. You could use this to find those people with no email address - these people could receive a written letter while those with an email address could get an email.
- ❖ >, <, >=, <= can be used in text, date or numeric fields to match on data that is greater than, less than, greater than or equal to or less than or equal to the criterion specified, respectively. So to find all people whose name starts with the letter M or later (i.e. N, O,

P, etc) enter >M in the Last Name field. This can be useful if you are running a large mail-merge to break the mail-merge into manageable sections.

When not in the Wizard, check boxes can take one of two values (i.e. checked or unchecked) to represent True/False (Yes/No). In the Wizard a third state is added: Grayed. This means 'match on either True or False'. Without this state the search would always include the value specified in the check box, for example, it would always search for people whose Doctor's Report is required, or not required, as the case may be. In a grayed state the Doctor's Report Required check box is ignored in the search.

18.4.1 Customer Search Wizard

You may want to view a sub-set of the people on the database (for example, to Email specific people about an upcoming course or event). You can perform searches for people using the Customer Search Wizard, which can be opened by clicking **File** then **Wizards** then **Customer Search Wizard**.

Introduction



Details of the criteria you can set on each of the tabs are described in its own section here:

General

Customer Search Wizard

Introduction **General** Details Club Certifications Trips Enquiries Stock Items Rentals Results

Name

First Name* A*

Middle Initial

Last Name* A*

Known As A*

Customer ID

Personal Details

DOB between 19 Apr 2006 And 19 Apr 2006

B/Day within days

Sex

Marital Status

Company

On Mailing List

On ☐ Newsletter ☐ Student News

Not On ☐ Newsletter ☐ Student News

Home Address Local Work

Country

Line 1 A*

Line 2 A*

City A*

Region

Zip A*

Contact Details

Phone (H) A*

Phone (W) A*

Phone (M) A*

Fax A*

EMail A*

Pager A*

Customer Type

Held ☐ Captain ☐ Club Member ☐ Dive Master ☐ Employee ☐ Instructor

Not Held ☐ Captain ☐ Club Member ☐ Dive Master ☐ Employee

<<Previous Next>> Search Clear Close

On the General Tab you can enter criteria into any of the fields. For instance, to find all people with last name 'Smith' type 'Smith' into the Last name field and click **Search**. Only those people whose last name starts with 'Smith' will now appear in the customer grid. You can enter criteria into a combination of fields. Thus, if you wanted to find all the Smiths who have a birthday in the next 30 days, add '30' to the B/Day within Days field. The system will find all those people whose last name starts with Smith AND whose birthday is coming up.

To find all people who are to receive the Newsletter put a check mark against that in the Mailing Lists box. If you check more than one Mailing List entry, people who are to receive any of the checked items are found.

A B/Day within X days field also becomes available. You can use this to search for all people whose birthday is coming up. For example, type 7 to find all birthdays in the next week. You could email an e-card (perhaps including a special offer to encourage them into your store) to those that have an email address straight from EVE and print out a paper card for the others.

Details

Customer Search Wizard

Introduction General **Details** Club Certifications Trips Enquiries Stock Items Rentals Results

Last Purchase Date

From Start of 19 Apr 2006 To End of 19 Apr 2006

Creation Date

From Start of 19 Apr 2006 To End of 19 Apr 2006

Last Updated Date

From Start of 19 Apr 2006 To End of 19 Apr 2006

Next of Kin Name A*

Notes A*

Enquiry Source

Freq. Flyer # A*

Passport # A*

First Language

☐ Unavailable? ☒ Commissionable? ☒ Doctor's Report Required? ☒ Doctor's Report Received?

User Defined #1

User Defined #2

User Defined #3

Tax Exemptions

☐ Standard Rate ☐ State Tax (3%)

<<Previous Next>> Search Clear Close

You can search for customers who made purchases between a specific set of dates or who were updated between two dates. Use the User Defined fields to search on data specific to your location. These *Field Labels* are created when setting Customer Options (See Section 4.3.3. Customers Options) and are displayed on the Customer Details tab.

Club

Customer Search Wizard

Introduction | General | Details | **Club** | Certifications | Trips | Enquiries | Stock Items | Rentals | Results

Club

Club M/ship # A*

Membership Type

Membership Start Date

From Start of 19 Apr 2006

To End of 19 Apr 2006

Membership End Date

From Start of 19 Apr 2006

To End of 19 Apr 2006

<<Previous Next>> Search Clear Close

On the Club Tab you can enter criteria into any of the fields. For instance, to find all people who are members of the 'Ocean Floor' club, pick that club from the pop up list box.

Certifications

Customer Search Wizard

Introduction | General | Details | Club | **Certifications** | Trips | Enquiries | Stock Items | Rentals | Results

Instructor

Status

Certified

Between April 19, 2006

And April 19, 2006

PIC Status

Certifications Obtained

- ☐ Advanced Open Water Diver
- ☐ Adventure Diver
- ☐ Altitude Diver
- ☐ Atlantis/Dolphin Rebreather
- ☐ Basic Scuba
- ☐ bbbc
- ☐ bbbd
- ☐ Bloodborne Pathogens Aware
- ☐ Boat Diver
- ☐ Bubble Maker
- ☐ Cavern Diver
- ☐ Coral Reef Conservation
- ☐ Deep Diver
- ☐ Discover Enriched Air Nitrox
- ☐ Discover Scuba Diving
- ☐ Distinctive Specialty
- ☐ DiveMaster
- ☐ DPV Diver
- ☐ Drift Diver

Certifications NOT Obtained

- ☐ Advanced Open Water Diver
- ☐ Adventure Diver
- ☐ Altitude Diver
- ☐ Atlantis/Dolphin Rebreather
- ☐ Basic Scuba
- ☐ bbbc
- ☐ bbbd
- ☐ Bloodborne Pathogens Aware
- ☐ Boat Diver
- ☐ Bubble Maker
- ☐ Cavern Diver
- ☐ Coral Reef Conservation
- ☐ Deep Diver
- ☐ Discover Enriched Air Nitrox
- ☐ Discover Scuba Diving
- ☐ Distinctive Specialty
- ☐ DiveMaster
- ☐ DPV Diver
- ☐ Drift Diver

<<Previous Next>> Search Clear Close

On the Certifications tab in the Wizard, you can put a check mark against one or more entries in the Certifications Obtained list to find those people who have been certified in any one of the course-types specified. You can also put a check mark against one or more entries in the Certifications NOT Obtained list to find those people who are not certified in any of the course types specified. You can use both lists together, for example to find those people who are certified in Open Water but who are not certified in Advanced Open Water.

The Instructor pop up list box can be used to find those people who had a particular instructor on their course.

The Status pop up list box defaults to 'Certified' as soon as any certification is checked to indicate that you are only interested in finding certified people. You can override this to search on one of the other states if you wish. You could, for example perform a search to find all those people currently enrolled on Open Water courses (click Open Water in the Certifications Obtained list and click 'Registered on a Course' in the Status pop up list box).

The Between and And dates can be used to find people who were certified between certain dates.

The PIC Status pop up list box can be used to search for people with certifications in a particular status. For instance, to find all those people with a certification, about which PADI has not yet been notified, choose Pending from the pop up list box.

If a combination of criteria is set, only people who match ALL the criteria for a particular course will be found. This means that if, for example, 'Advanced' is checked in the Certifications Obtained list and 'Pam Jones' is picked as the instructor, a person who qualified in 'Advanced' with 'Mark Hurst' will NOT be found. Equally, a person who qualified in 'Open Water' with 'Pam Jones' will NOT be found. A person who qualified in 'Advanced' with 'Pam Jones' WILL be found.

NOTE: the search criteria on the Certifications tab are used to find people - not certifications. For example, if you search for people that have taken a Scuba Review, those people that have taken multiple scuba reviews will only be shown once in the results. This applies equally to the Enquiries and Trips tabs.

Trips

The screenshot shows the 'Customer Search Wizard' window with the 'Trips' tab selected. The window has a tabbed interface with 'Introduction', 'General', 'Details', 'Club', 'Certifications', 'Trips', 'Enquiries', 'Stock Items', 'Rentals', and 'Results'. The 'Trips' tab is active, showing two columns: 'Destinations Visited' and 'Destinations NOT Visited'. Each column contains a list of destinations with checkboxes. The 'Trip Date' is set to 'Between April 19, 2006' and 'And April 19, 2006'. At the bottom, there are buttons for '<<Previous', 'Next >>', 'Search', 'Clear', and 'Close'. The 'Search' button is highlighted in green.

The Trips tab in the Wizard behaves in a similar way to the Certifications tab. You can search for people who visited a particular destination using the Destinations Visited list and find those people that have not visited a particular destination using the Destinations Not Visited list.

You can find those people who went on trip(s) between certain dates.

Enquiries

Customer Search

Introduction | General | Details | Club | Certifications | **Trips** | Enquiries | Stock Items | Rentals | Services | Results

Employee who Registered the Enquiry:

Contact Method:

Interested Between: Wednesday, December 15, 2010 And: Wednesday, December 15, 2010

Enquiry Notes:

Courses Interested in Taking

- ☐ Advanced Open Water Diver
- ☐ Adventure Diver
- ☐ Altitude Diver
- ☐ Atlantis/Dolphin Rebreather
- ☐ Basic Scuba
- ☐ Bloodbore Rebreather

Courses - No Interest Indicated

- ☐ Advanced Open Water Diver
- ☐ Adventure Diver
- ☐ Altitude Diver
- ☐ Atlantis/Dolphin Rebreather
- ☐ Basic Scuba
- ☐ Bloodbore Rebreather

Trips Interested in Attending

- ☐ Akumal
- ☐ Aruba
- ☐ Australia: Cairns
- ☐ Bahamas
- ☐ Bermuda

Trips - No Interest Indicated

- ☐ Akumal
- ☐ Aruba
- ☐ Australia: Cairns
- ☐ Bahamas
- ☐ Bermuda

Special Interests Held

- ☐ Cycling
- ☐ Golf
- ☐ Photography
- ☐ Skiing
- ☐ Sky Diving

Special Interests NOT Held

- ☐ Cycling
- ☐ Golf
- ☐ Photography
- ☐ Skiing
- ☐ Sky Diving

Search << >> Clear Close

The Enquiries tab in the Wizard behaves in a similar way to the Certifications tab. You can search for people with or without a particular interest using the Courses Interested in Taking and Courses - No Interest Indicated lists. This is also true for Trips and Special Interests Enquiries. You can pick an employee from the pop up list box to find those people who registered their interest with that employee. You can choose a Contact Method to find enquiries that originated by that method. You can find those people interested in attending courses/trips/special events between certain dates.

Stock Items

Customer Search Wizard

Introduction | General | Details | Club | Certifications | Trips | Enquiries | **Stock Items** | Rentals | Results

Stock Types Purchased

- ☐ Accessories
- ☐ Advertising Merchandise
- ☐ Air Fill
- ☐ Air Tank Service Parts
- ☐ Airtanks
- ☐ Bags
- ☐ Bank Deposits
- ☐ Batteries
- ☐ BCDs
- ☐ Books
- ☐ Boots
- ☐ Buoys
- ☐ Cameras
- ☐ Carriage
- ☐ Certification Materials
- ☐ Clips
- ☐ Club Trips
- ☐ Compasses
- ☐ Computers
- ☐ Consultancy

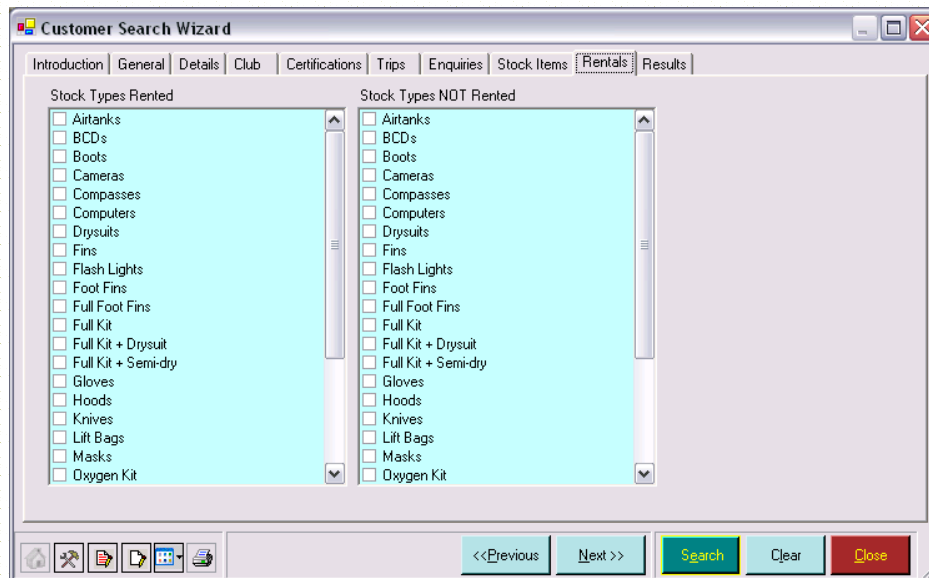
Stock Types NOT Purchased

- ☐ Accessories
- ☐ Advertising Merchandise
- ☐ Air Fill
- ☐ Air Tank Service Parts
- ☐ Airtanks
- ☐ Bags
- ☐ Bank Deposits
- ☐ Batteries
- ☐ BCDs
- ☐ Books
- ☐ Boots
- ☐ Buoys
- ☐ Cameras
- ☐ Carriage
- ☐ Certification Materials
- ☐ Clips
- ☐ Club Trips
- ☐ Compasses
- ☐ Computers
- ☐ Consultancy

<<Previous Next>> Search Clear Close

Use the Stock Items tab to identify the specific types of Stock Items a customer has purchased. For example, you could highlight all of those customers who have purchased a wetsuit but not a dry suit and contact them about a Dry suit Orientation night you are hosting.

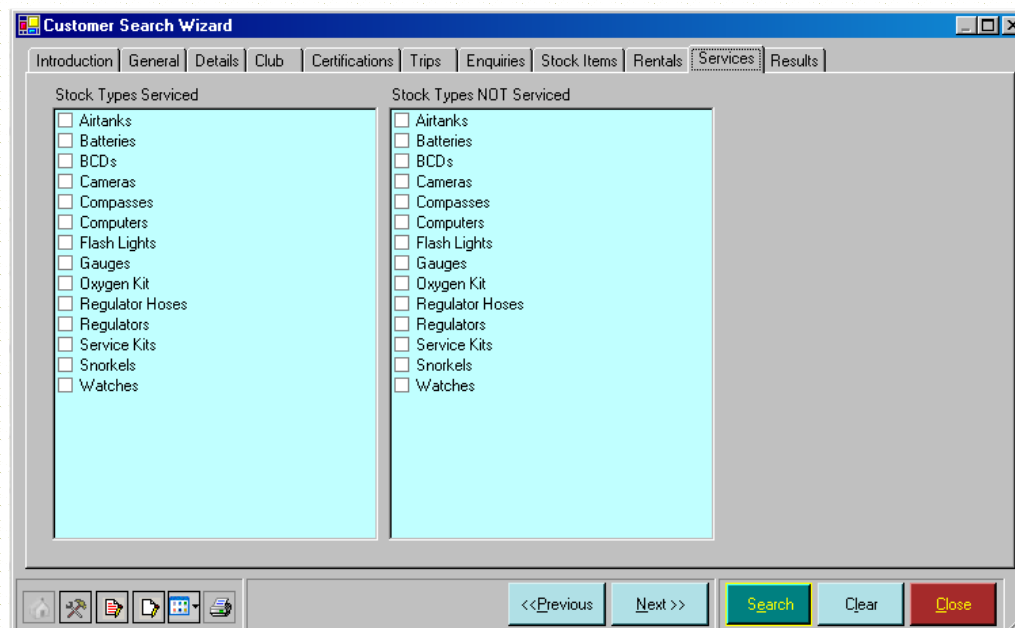
Rentals



The screenshot shows the 'Customer Search Wizard' window with the 'Rentals' tab selected. The window has a tabbed interface with tabs for Introduction, General, Details, Club, Certifications, Trips, Enquiries, Stock Items, Rentals, and Results. The 'Rentals' tab is active, displaying two columns: 'Stock Types Rented' and 'Stock Types NOT Rented'. Both columns contain a list of equipment types with checkboxes next to them. The 'Stock Types Rented' column lists: Airtanks, BCDs, Boots, Cameras, Compasses, Computers, Drysuits, Fins, Flash Lights, Foot Fins, Full Foot Fins, Full Kit, Full Kit + Drysuit, Full Kit + Semi-dry, Gloves, Hoods, Knives, Lift Bags, Masks, and Oxygen Kit. The 'Stock Types NOT Rented' column lists the same items. At the bottom of the window, there are buttons for '<<Previous', 'Next>>', 'Search', 'Clear', and 'Close'.

Use the Rentals tab to identify the specific types of equipment a customer has rented. For example, you could highlight all of those customers who have rented a wetsuit but not a dry suit and contact them about a Dry suit Specialty class you are hosting.

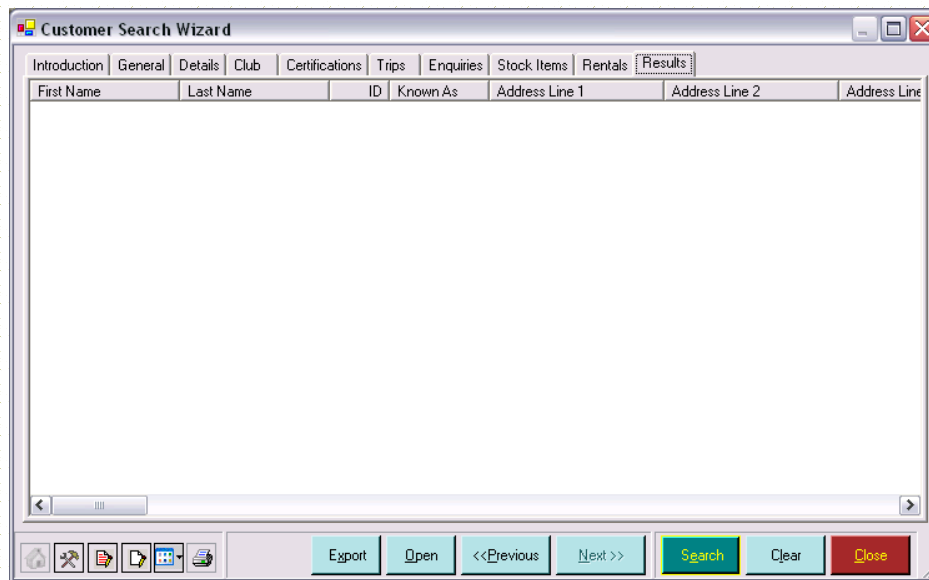
Services



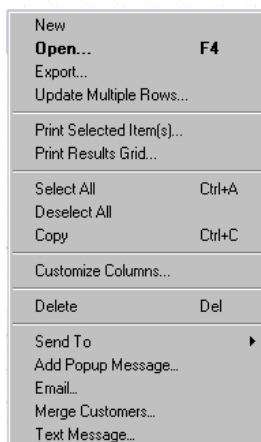
The screenshot shows the 'Customer Search Wizard' window with the 'Services' tab selected. The window has a tabbed interface with tabs for Introduction, General, Details, Club, Certifications, Trips, Enquiries, Stock Items, Rentals, Services, and Results. The 'Services' tab is active, displaying two columns: 'Stock Types Serviced' and 'Stock Types NOT Serviced'. Both columns contain a list of equipment types with checkboxes next to them. The 'Stock Types Serviced' column lists: Airtanks, Batteries, BCDs, Cameras, Compasses, Computers, Flash Lights, Gauges, Oxygen Kit, Regulator Hoses, Regulators, Service Kits, Snorkels, and Watches. The 'Stock Types NOT Serviced' column lists the same items. At the bottom of the window, there are buttons for '<<Previous', 'Next>>', 'Search', 'Clear', and 'Close'.

Use the Services tab to identify the specific types of equipment a customer has had serviced.

Results



The results tab lists all of the customers who meet the search criteria you have previously identified. From this screen, you can Export results to Microsoft Excel or Microsoft Word, you can open a specific customer to review the details of that customer, or you can email all or some of the customers by selecting them in the list and right mouse clicking to bring up an email option. The Results tab lists all of the customers who meet the search criteria you have previously identified. From this screen, you can Export results to Microsoft Excel or Microsoft Word; you can open a specific customer to review the details of that customer. Select one or more customers and then right click on the selected area to display the popup menu shown below which includes the powerful Email option, which you should use on a regular basis:



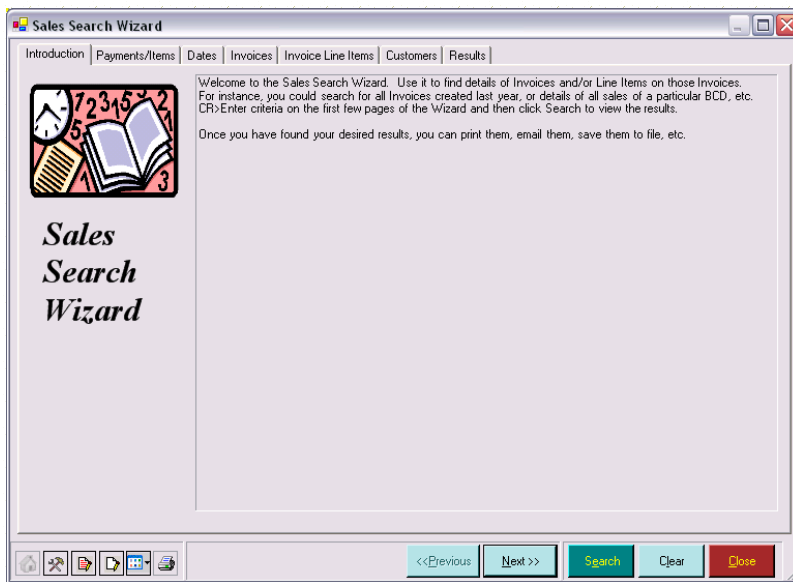
New	Create a new Customer record
Open...	Open the selected Customer record(s)
Export...	Opens EVE's standard Export form (See Section 18.5.Exports) so you can create letters, emails, Excel files, etc
Update Multiple Rows...	Opens EVE's standard form for updating multiple records at a time (See Section 20.1.Update Multiple Rows).

Print...	Prints the selected records. Depending on the report layout you choose when you click Print, the resulting print will either be of one page for each item selected (e.g. if you have 3 invoices selected, 3 pages will be printed with one invoice on each), or will be one page showing all the selected items in a grid (if the same 3 invoices were selected, 1 page would be printed showing one line for each invoice).
Select All	Selects all records in the results grid
Deselect All	Deselects all records in the results grid
Copy	Copies records that are selected in the results grid so you can Paste them elsewhere - e.g. onto the Invoice Cool Bar.
Customize Columns...	Allows you to change which columns appear in the results grid
Delete	Deletes selected record(s)
Send To -> Sales Search Wizard	Sends selected customers in the results grid to the Customers page of the Sales Search Wizard. In this way you could, for example, do a search using the Customer Search Wizard for all people that attended OW courses this year and send the results to the Sales Search Wizard so you can search on the sales generated by those people.
Add Message... Popup	Use this to assign a popup message that will be displayed when the customer is added to an invoice, rental booking or service booking. For instance, you could do a search for all people that work at a nearby company and add a popup message so the sales staff are reminded to offer them a discounted place on trips when they are next in the store.
Email...	You should use this option frequently to target your customers. It loads the powerful Email wizard (See Section 7.4.Customer Emails)
Merge Customers...	If the same customer has mistakenly been added more than once, you can select those records in the results grid and use this option to merge them into one. This process will assign all invoices, rental bookings, course enrolments, etc that relate to all records being merged to the 'master' customer record.
Text Message	Use this option to send an SMS Text Message to the cell phone of the selected customers.

18.4.2 Sales Search Wizard

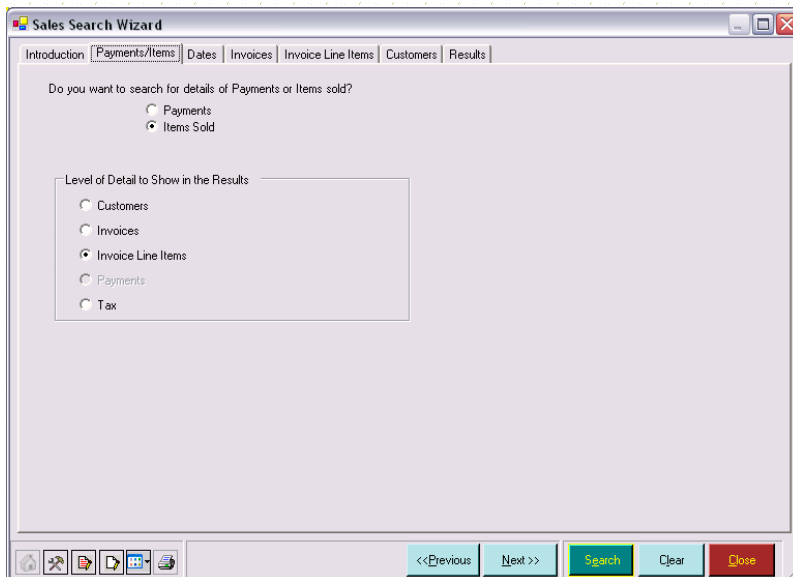
Load the Sales Search dialog clicking the **File** menu and then Wizards and then Sales Search Wizard. The form allows you to perform complex searches through your existing sales transactions. For instance, you could search to see how much profit you have made on Dive Computers so far this year, and compare with the same period last year; you could search to see how much revenue a particular employee has generated; you could search to see the total value of Mares stock sold and compare with the equivalent value of Aqualung stock, etc.

Introduction



The dialog is presented as a Wizard to help you to specify criteria for the search. You are presented with a series of tabs of information and you can indicate whether you want to specify search criteria based on each page's contents. A description of each page follows:

Payments/Items



You can either perform a search for items sold or payment made. Your choice will determine whether the Invoice Line Items page or Payment Methods page is shown.

Tax Groups

Before describing the Items Sold option we will give a description of tax groups used in EVE. You can ignore the following paragraph if you pay tax to only one tax authority.

Depending on your location, you may pay tax to more than one authority. For instance, in some American States, City tax and State tax are both charged on the sale of a single item. EVE caters for this by allowing you to define tax groups. For example, imagine that in your location both City tax (2%) and State tax (4%) are charged on wet suits. A tax group called

'City/State' (6%) could be defined. When a wet suit is sold, the default tax band applied would be 'City/State'. On the invoice the tax is calculated at 6%. In the background, EVE stores individual tax components calculated at 2% and 4% of the net price and you can run reports to see these values.

Items Sold

If you choose Items Sold, you must specify the level of detail that will be shown in the results. This can be one of the following: Customers, Invoices, Invoice Items and Tax. There is an implied 'hierarchy' in the search results:

❖ Customer >> Invoice >> Invoice Item >> Constituent Tax

The hierarchy implies that each customer can have several invoices; on each invoice there can be several invoice items (i.e. items bought); each invoice item may comprise more than one tax component.

Consider the following example:

- ❖ Suppose that Samantha Anderson is a regular customer and makes 3 separate purchases (i.e. she has 3 invoice invoices). On Invoice 1 she buys a wet suit and a snorkel (i.e. there are 2 invoice items). The wet suit has a tax group (City tax and State tax). The snorkel does not. On Invoice 2 she buys a mask and some fins (i.e. there are 2 invoice items). On Invoice 3 she buys a weight belt, some weights and a regulator (i.e. there are 3 invoice items).
- ❖ Bill Brandt makes 1 purchase of a wet suit (i.e. there is 1 invoice item)

If you perform a search and specify 'Customer' as the level of detail, the results will appear as follows:

- ❖ Samantha Anderson
- ❖ Bill Brandt

Only columns showing customer details are shown. Each customer record is only shown once.

NOTE: Although only customer details are shown in the results, you can still search using invoice or invoice item search criteria. For example, you could search for all customers that bought a Dive Computer last year. If your intention is to email those people, you would want to specify Customer as the level of detail so the same customer does not appear more than once if they bought more than one computer.

If you perform a search and specify 'Invoice' as the level of detail, the results appear as follows:

- ❖ Samantha Anderson Invoice 1
- ❖ Samantha Anderson Invoice 2
- ❖ Samantha Anderson Invoice 3
- ❖ Bill Brandt Invoice 4

Details of customers and their invoices are shown. If a customer has more than one invoice, their customer details are repeated for each one. Details of each invoice are shown once.

If you perform a search and specify 'Invoice Item' as the level of detail, the results appear as follows:

- ❖ Samantha Anderson Invoice 1 Wet Suit
- ❖ Samantha Anderson Invoice 1 Snorkel
- ❖ Samantha Anderson Invoice 2 Mask

- ❖ Samantha Anderson Invoice 2 Fins
- ❖ Samantha Anderson Invoice 3 Weight Belt
- ❖ Samantha Anderson Invoice 3 Weights
- ❖ Samantha Anderson Invoice 3 Regulator
- ❖ Bill Brandt Invoice 4 Wet Suit

Details of customers, their invoices and each item purchased on the invoices are shown. Each set of customer and invoice details may be shown more than once.

If items are displayed that were sold with a tax group, the tax group is shown - the constituent bands are not shown.

If you perform a search and specify 'Tax' as the level of detail, the results appear as follows:

- ❖ Samantha Anderson Invoice 1 Wet Suit City Tax
- ❖ Samantha Anderson Invoice 1 Wet Suit State Tax
- ❖ Samantha Anderson Invoice 1 Snorkel City Tax
- ❖ Samantha Anderson Invoice 2 Mask City Tax
- ❖ Samantha Anderson Invoice 2 Fins City Tax
- ❖ Samantha Anderson Invoice 3 Weight Belt City Tax
- ❖ Samantha Anderson Invoice 3 Weights City Tax
- ❖ Samantha Anderson Invoice 3 Regulator City Tax
- ❖ Bill Brandt Invoice 4 Wet Suit City Tax

Details of the tax incurred on each item are shown. If you are in a location that does not have tax groups then this level of detail is not required (as non tax group information is shown at the Invoice Item level) and so the search option is not available.

Payments

If, instead of Items Sold, you choose Payments then another hierarchy is implied:

Customer >> Invoice >> Payments

This hierarchy implies that each customer can have several invoices; on each invoice there can be several payments made.

Suppose that in the previous example:

- ❖ Samantha Anderson paid for Invoice 1 using a gift certificate and made up the balance with cash, Invoice 2 using a credit card, Invoice 3 half on credit card and half with cash.
- ❖ Bill Brandt paid for Invoice 4 with a check.

If you perform a search and specify 'Customer' or 'Invoice' as the level of detail, results appear as for the equivalent Items Sold search.

If you perform a search and specify 'Payments' as the level of detail, the results appear as follows:

- ❖ Samantha Anderson Invoice 1 Gift Certificate
- ❖ Samantha Anderson Invoice 1 Cash
- ❖ Samantha Anderson Invoice 2 Credit Card
- ❖ Samantha Anderson Invoice 3 Credit Card

- ❖ Samantha Anderson Invoice 3 Cash
- ❖ Bill Brandt Invoice 4 Check

Details of customers, their invoices and each payment method on the invoices are shown. Each set of customer and invoice details may be shown more than once.

Dates

If you want to narrow the search by entering a date range, choose Yes at the 'Do you want to set dates for the Search' prompt. Controls at the bottom of the page become enabled so you can choose the appropriate date range. If you choose No at the prompt, dates are ignored in the search (i.e. details are shown irrespective of when the sale was made).

Choose 'From the Start of the Day' to include only data for sales that occurred today. If you save a configuration and specify 'From the Start of the Day', the day in question is the day that the search is run, not the day the configuration was saved. This is useful as you can save a configuration and then run it at the end of every day to see the sales activity for that day.

The same applies for the alternatives 'From the Start of the Week', 'From the Start of the Month' and 'From the Start of the Year'.

You can compare data in previous years by choosing a year from the 'In Year' pop up list box.

For example, if today is 10th December 2006, and 'From the Start of the Day' is selected, you can choose 2005 to see the value of sales on 10th December 2005, choose 2004 to see the value of sales on 10th December 2004, etc.

You can do the same thing for the week, month and year periods.

Choose 'Specify Range' and enter 2 dates if you want to do a search for a specific date range.

Invoices

Sales Search Wizard

Introduction | Payments/Items | Dates | **Invoices** | Invoice Line Items | Customers | Results

Transaction Details

Cost Center

Store

Invoice Type

PC

Employee

Status **Valid**

Invoice #

Closing ID

Accounting Period #

<<Previous Next>> Search Clear Close

On the Invoices page of the Wizard, you can specify criteria relating to the Invoices.

Enter additional invoice related criteria if you wish. Choose a Cost Center from the pop up list box if you only want to see results of sales in that Cost Center. Choose a Store from the pop up list box if you only want to see results of sales at a particular store. Choose an Invoice Type if you only want to see results of sales on, for example, Ongoing invoices or Bank Deposits. Choose a computer name from the PC pop up list box if you only want to see results of sales that were dealt with on that computer. Choose an Employee from the pop up list box if you only want to see results of sales that were handled by that employee. Choose a Status (i.e. one of Valid or Void) from the pop up list box to show only details where the invoices have that status. Enter an invoice number if you only want to see data relating to that invoice. Enter a Closing ID if you only want to show information that appeared on a particular set of closing reports (a Closing ID is set every time you run the end of day Closing reports). Enter an Account Period # if you only want to see data relating to that period (an account period is set every time you run the QuickBooks export feature. The first time you run the export, all invoices that were included in the export file are marked as being in accounting period #1, the second time you run the export, all included invoices are marked as being in accounting period #2, etc.) If you want to see details of invoices not yet exported to QuickBooks, put in empty double-quotes - i.e. ""

Invoice Line Items

The screenshot shows the 'Sales Search Wizard' window with the 'Invoice Line Items' tab selected. At the top, there is a question: 'Do you want to restrict the Search to show data relating to a particular Invoice Line Item of collection of Line Items?' with radio buttons for 'Yes' and 'No' (selected). Below this, there are several input fields for search criteria: 'Profit Center', 'Stock Type', 'Manufacturer', 'Tax Band', 'Discount Band', 'Stock #', and 'Location in Store'. Each field has a small icon to its right. Below these fields is a section titled 'Search on this list of Stock Items' which contains a table with columns: 'Stock Item ID', 'Stock Item', 'Stock #', 'Stock Type', and 'Manufacturer'. To the right of the table are two buttons: 'Add Stock Item(s)' and 'Remove Stock Item(s)'. At the bottom of the window are navigation buttons: '<<Previous', 'Next>>', 'Search', 'Clear', and 'Close'.

The Invoice Line Items page of the Wizard is only available if you previously chose 'Items Sold' on the Payments/Items page.

Choose No, at the top of the page, if you are not interested in specifying invoice item related search criteria. Choose an item from one or more of the pop up list boxes to restrict the search results to data that matches. Enter a Stock Number (SKU) to find data relating to that item.

Payment Methods

The screenshot shows the 'Sales Search Wizard' window with the 'Payment Methods' tab selected. On the left side, there is a list box containing the following payment methods: American Express, Cash, Check, Discover, Gift Card, Gift Certificate, Master Card, On Account, and Visa. Each item has a checkbox next to it. The rest of the page is empty. At the bottom of the window are navigation buttons: '<<Previous', 'Next>>', 'Search', 'Clear', and 'Close'.

The Payment Methods page of the Wizard is only available if you previously chose 'Payments' on the Payments/Items page.

Choose No at the top of the page if you are not interested in specifying payment method related search criteria. Otherwise choose Yes, to enable the list box. Put a check mark against one or more payment methods that you are interested in.

Customers

Sales Search Wizard

Introduction | Payments/Items | Dates | Invoices | Invoice Line Items | **Customers** | Results

Do you want to restrict the Search to show data relating to particular Customer(s)

☐ Yes
☒ No

Customers
Search on this list of Customers

Mailing Lists
☐ Newsletter
☐ Student News

Enquiry Source

Last Purchase Date
From Start Of: April 19, 2006
To End Of: April 19, 2006

Add Customer Remove Customer Open Customer

<<Previous Next>> Search Clear Close

Choose No at the top of the page if you are not interested in specifying customer related search criteria. Otherwise choose Yes, to enable the controls in the lower half of the page.

If you want to search for data relating to particular customers, click the **Add Customer** button to add those customers to the list. You can enter dates into the 'From Start Of' and 'To End Of' fields in the Last Purchase Date section to search for records where the customer last purchased goods between those dates.

Put a check mark against one or more entries in the Mailing Lists box to find customers on those mailing lists (an 'OR' search is performed if more than one mailing list is checked- i.e. all customers on mailing list 1 OR mailing list 2 are found).

Results

Sales Search Wizard

Introduction | Payments/Items | Dates | Invoices | Invoice Line Items | Customers | **Results**

Sub-Total Tax Total CDGS Net Profit

Export Open <<Previous Next>> Search Clear Close

Once you have entered all of your search criteria, click the **Search** button to see the results. Data is displayed in the grid and the columns shown depend on the alternatives you chose on the Payments/Items page of the Wizard.

Below the grid is an **Export button**. Click this to send the search results to the standard Export. By this method, you could send customer details to the Export form in preparation for a mail shot, or send transaction item details to the Export form ready to export to Microsoft Excel for further analysis of your sales figures.

Select one or more records and right click on the selected area to show further alternatives as described in Exports (See Section 18.5.Exports).

18.4.3 Purchases Search Wizard

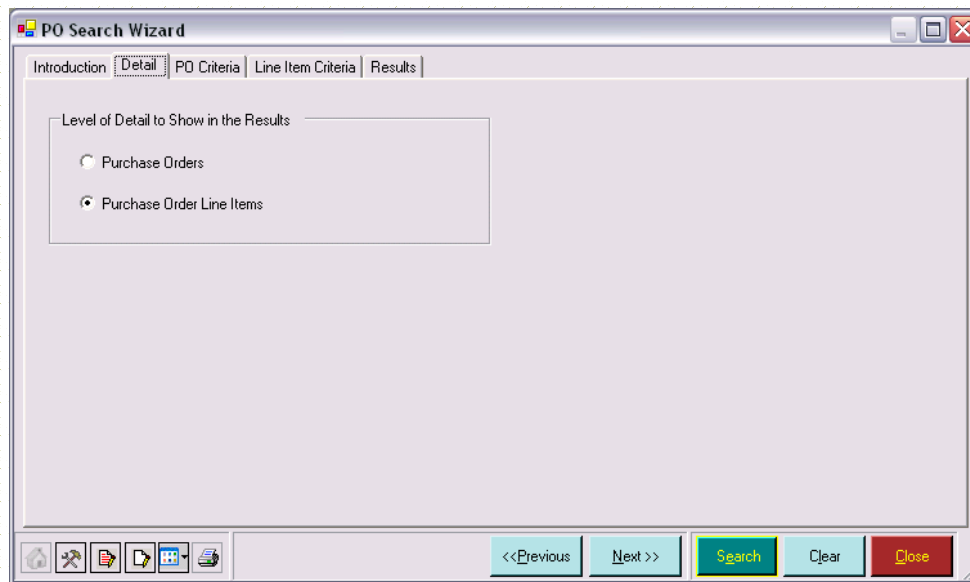
Use the Purchases Search Wizard to set criteria and perform searches through existing Purchase Orders.

Introduction



The dialog is presented as a Wizard to help you to specify criteria for the search. You are presented with a series of tabs of information and you can indicate whether you want to specify search criteria based on each page's contents. A description of each page follows:

Detail



The level of detail shown in the results depends on which checkboxes are checked in the Details section. There is an implied 'hierarchy' in the search results:

- ❖ Supplier >> Purchase Order >> Purchase Order Item

The hierarchy implies that each supplier can have several Purchase Orders; on each Purchase Order there can be several line items.

Consider the following example:

- ❖ Suppose that Aqua Tec is a regular supplier and you have created 3 Purchase Orders. On Purchase Order#1 are 5 wet suits and 8 dry suits (i.e. 2 order items). On Purchase Order#2 are 3 wet suits, 10 masks and 10 snorkels (i.e. 3 order items). On Purchase Order#3 are 3 dry suits and 4 pairs of fins (i.e. 2 order items).
- ❖ There is also 1 Purchase Order for Northern Diver for 7 dry suits.

If you perform a search with Purchase Orders Line Items checked in the Details of section, the results will appear as follows:

- ❖ Aqua Tec Purchase Order#1 5 * Wet Suit
- ❖ Aqua Tec Purchase Order#1 8 * Dry Suit
- ❖ Aqua Tec Purchase Order#2 3 * Wet Suit
- ❖ Aqua Tec Purchase Order#2 10 * Mask
- ❖ Aqua Tec Purchase Order#2 10 * Snorkel
- ❖ Aqua Tec Purchase Order#3 3 * Dry Suit
- ❖ Aqua Tec Purchase Order#3 4 * Fins
- ❖ Northern Purchase Order#4 7 * Dry Suit

Note that data in the 'upper' levels of the hierarchy is repeated.

If you perform the search with only Purchase Orders checked, the results will appear as follows:

- ❖ Aqua Tec Purchase Order#1

- ❖ Aqua Tec Purchase Order#2
- ❖ Aqua Tec Purchase Order#3
- ❖ Northern Purchase Order#4

Details of stock items are no longer shown and the number of rows is decreased as each Purchase Order is only shown once now.

Purchase Order Criteria

The screenshot shows the 'PO Search Wizard' dialog box with the 'PO Criteria' tab selected. The dialog has a tabbed interface with 'Introduction', 'Detail', 'PO Criteria', 'Line Item Criteria', and 'Results'. The 'PO Criteria' tab contains several input fields and a status list.

Fields on the left:

- Supplier: [Text box]
- Purchase Order #: [Text box]
- Shipped to Store: [Text box]
- Employee: [Text box]
- Invoice #: [Text box]
- Shipping Instrcts.: [Text box]
- Payment Terms: [Text box]

Status section:

- ☐ All Received
- ☐ Awaiting Back Orders
- ☐ Complete
- ☐ Sent
- ☐ Unsent
- ☐ Void

Dates section (right):

- Created:**
 - Between Start of: [April 19, 2006]
 - And End of: [April 19, 2006]
- Sent:**
 - Between Start of: [April 19, 2006]
 - And End of: [April 19, 2006]
- Completed:**
 - Between Start of: [April 19, 2006]
 - And End of: [April 19, 2006]

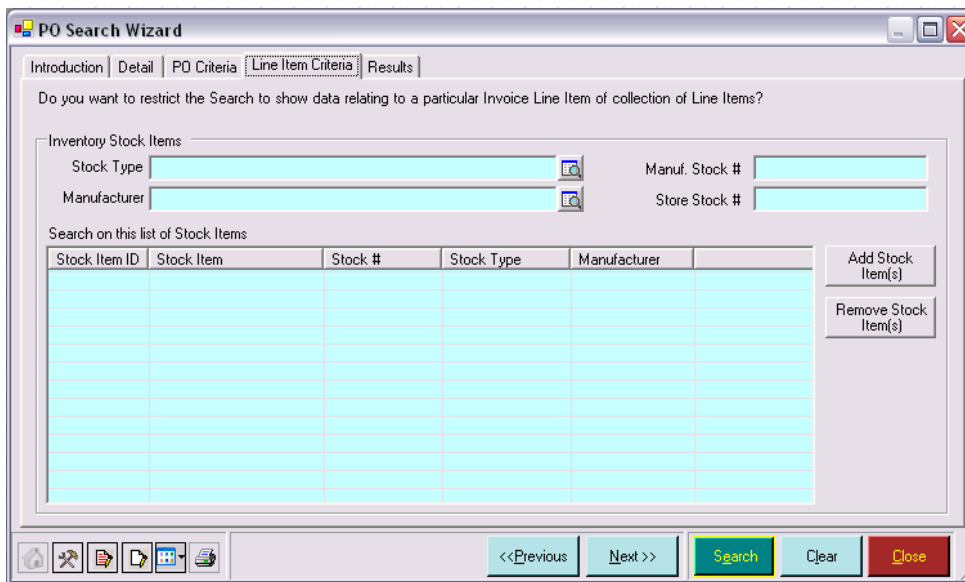
Buttons at the bottom: <<Previous, Next>>, Search, Clear, Close.

Use the fields on the Purchase Order Criteria tab to define your search criteria. If you are only interested in seeing data relating to a particular supplier, choose that supplier from the Supplier pop up list box. If you are only interested in seeing data relating to a particular Store, choose that Store from the Shipped to Store pop up list box.

Enter a Purchase Order number if you only want to see data relating to that order. Enter dates in the Between and And Dates section to see only data on Purchase Orders between those dates. Select one or more entries in the Status list to show data relating to orders with those states.

Enter an invoice number to find data relating to that invoice. Pick an Employee from the pop up list box to find details of Purchase Orders created by that employee.

Line Item Criteria



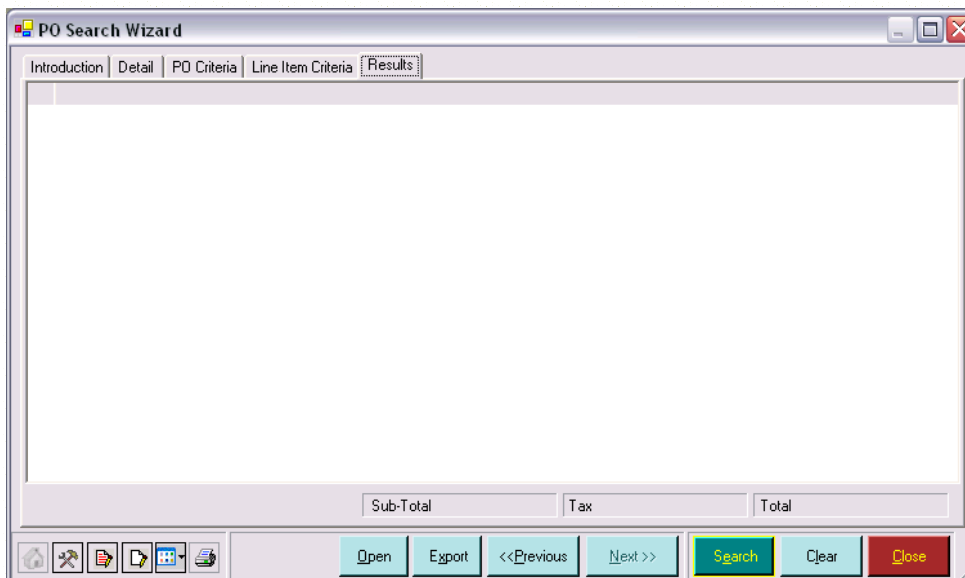
The screenshot shows the 'PO Search Wizard' window with the 'Line Item Criteria' tab selected. The window has a tabbed interface with 'Introduction', 'Detail', 'PO Criteria', 'Line Item Criteria', and 'Results'. Below the tabs, a question asks: 'Do you want to restrict the Search to show data relating to a particular Invoice Line Item or collection of Line Items?'. Under this, there's a section 'Inventory Stock Items' with two text boxes: 'Stock Type' and 'Manufacturer', each with a magnifying glass icon. To the right are two more text boxes: 'Manuf. Stock #' and 'Store Stock #'. Below these is a section 'Search on this list of Stock Items' containing a table with columns: 'Stock Item ID', 'Stock Item', 'Stock #', 'Stock Type', and 'Manufacturer'. The table is currently empty. To the right of the table are two buttons: 'Add Stock Item(s)' and 'Remove Stock Item(s)'. At the bottom of the window is a toolbar with icons for home, back, forward, print, and save, followed by navigation buttons: '<<Previous', 'Next>>', 'Search' (highlighted in green), 'Clear', and 'Close' (highlighted in red).

You can search on individual stock items ordered. To do this, click the **Add Stock Item(s) button** to add them to the grid.

If you are only interested in particular stock types or manufacturers, pick those from the appropriate pop up list box.

Results

All the search fields can be used together. For example, if you choose Aqua Tec as the Supplier and Wet Suit as the Stock Type, only data relating to Aqua Tec Wet Suits is shown in the results grid. When you have defined all your search criteria, click the **Search button**. Matching data is shown in the Search Results grid.



The screenshot shows the 'PO Search Wizard' window with the 'Results' tab selected. The window has the same tabbed interface as the previous screen. The main area is a large empty grid for displaying search results. At the bottom of the grid area are three text boxes: 'Sub-Total', 'Tax', and 'Total'. Below these is a toolbar with icons for home, back, forward, print, and save, followed by navigation buttons: 'Open', 'Export', '<<Previous', 'Next>>', 'Search' (highlighted in green), 'Clear', and 'Close' (highlighted in red).

18.4.4 Inventory Search Wizard

The Inventory Search Wizard is used to find specific Stock Items on the database.

Introduction



The dialog is presented as a Wizard to help you to specify criteria for the search. You are presented with a series of tabs of information and you can indicate whether you want to specify search criteria based on each page's contents. A description of each page follows:

Items

Inventory Search Wizard

Introduction **Items** Results

Store: **Ocean Pro Adventures Ltd.**

Stock Levels

Include only if More than in Stock

Include only if Less than in Stock

Period

☒ Show Current Inventory Values

☐ Show Inventory Values at Start of Day on...

April 19, 2006

Retail Prices

☒ Show Max Cost Center Price

☐ Show Min Cost Center Price

☐ Show Price for Cost Center

Ocean Pro Adventures Ltd.

Stock Types

- ☐ Accessories
- ☐ Advertising Merchandise
- ☐ Air Fill
- ☐ Air Tank Service Parts
- ☐ Airtanks
- ☐ Bags
- ☐ Bank Deposits
- ☐ Batteries
- ☐ BCDs
- ☐ Books
- ☐ Boots
- ☐ Buoys
- ☐ Cameras
- ☐ Carriage
- ☐ Certification Materials
- ☐ Clips
- ☐ Club Trips
- ☐ Compasses
- ☐ Computers
- ☐ Consultancy
- ☐ Contract Services
- ☐ Courses
- ☐ Courses Administration M
- ☐ Courses Technical
- ☐ Dive Center Recognition M

Manufacturers

- ☐ A. P. Valves
- ☐ ADEC
- ☐ Allprint
- ☐ Analox Sensor Technok
- ☐ Apeks Marine
- ☐ Aqua Tec
- ☐ Aqualung
- ☐ Aquion
- ☐ Arndale Inc
- ☐ Avis
- ☐ Axis Optical
- ☐ Beaver
- ☐ Blandford Sub-Aqua
- ☐ Blind Dog
- ☐ Body Glove
- ☐ Citizen Watch (UK) Ltd
- ☐ Cobra
- ☐ Cressi Sub
- ☐ Custom Divers Ltd
- ☐ DAN
- ☐ DCM Sales Ltd
- ☐ Dive Magazine
- ☐ G & H Engineering
- ☐ Gas Container Services
- ☐ Gul International

Select All Deselect All Select All Dese

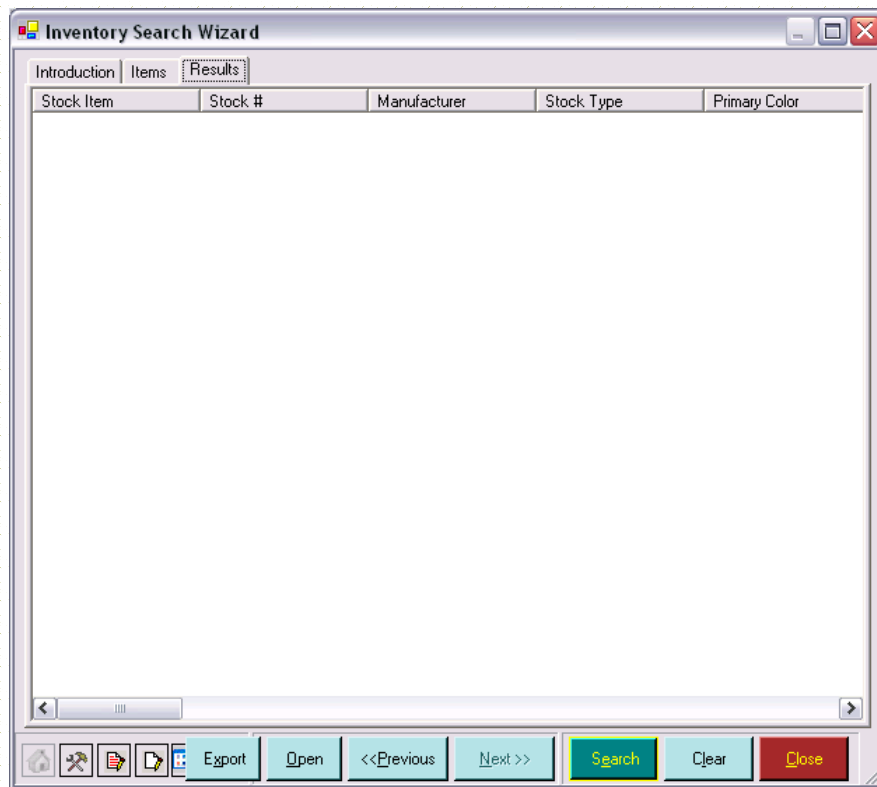
<<Previous Next>> Search Clear Close

You can search for stock items at a particular store. You can limit your search to items where you may be over or under stocked by indicating the number of items you have in stock. You can search for stock belonging to a specific Stock Type or to a specific manufacturer.

When results are displayed, you can choose to show the current inventory value of the stock or the Inventory value on a particular day in the past. This is useful, for example, if you depreciate your unsold stock items or if you need to get inventory values at your tax end date and it is now some time after that date.

EVE lets you sell the same items through multiple Cost Centers (for example, if you have a store and a mail-order company) and the retail price may be different at each store. You can choose which cost center price to display or choose the maximum price, minimum price or the price.

Results



When you have defined all of your search criteria, click the **Search** button. Matching data is shown in the Search Results grid.

18.5 Exports

You can use the power of Microsoft software to enhance your business sales; for example, all transaction histories can be exported to Microsoft Excel, where sales reports and graphs can be produced from the information supplied.

The EVE mail merge function allows you to mail customers using Microsoft Word. For example, if a group of Open Water customers have completed their course at the weekend, underpin your instructor's sales pitch by sending out a personalized invitation for them to book onto an advanced Open Water course. Mail merge can even produce the address labels for you to stick on the envelopes! Alternatively, send a personalized e-mail directly from the customer's grid.

You can use the Export option from any Search box within the system by selecting the rows you wish to export and right mouse clicking to bring up the Export option. In addition, a number of the reports (discussed above) offer an Export option. Finally, you can export the results of any search you complete using a search wizard.

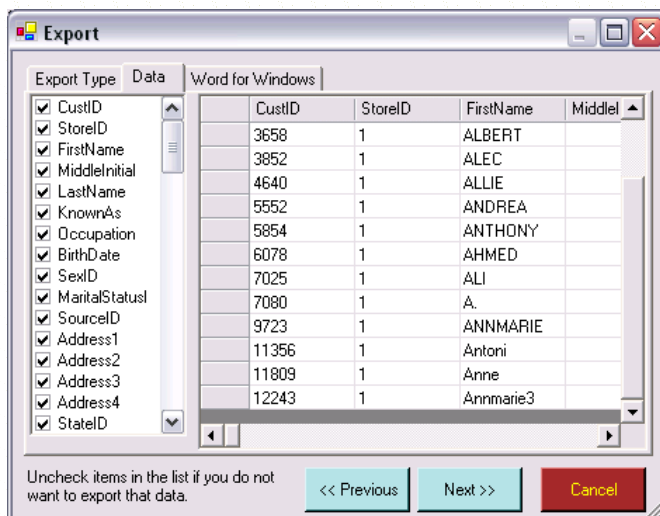
General



The 'Export Wizard' window is shown with the 'General' tab selected. It features a title bar with 'Export' and standard window controls. Below the title bar are three tabs: 'Export Type', 'Data', and 'Word for Windows'. The 'Export Type' tab is active, displaying a graphic of a clock and an open book with the text 'Export Wizard'. To the right, a message says 'Choose the type of export file you want to create'. Below this, the 'Export Type' section contains four radio buttons: 'Word for Windows (Mail Merge)' (selected), 'Email (Using Word Mail Merge)', 'Microsoft Excel', and 'Text File'. At the bottom are three buttons: '<< Previous', 'Next >>', and 'Cancel'.

Choose the type of Export you require (Microsoft Word, Microsoft Excel, etc.).

Data



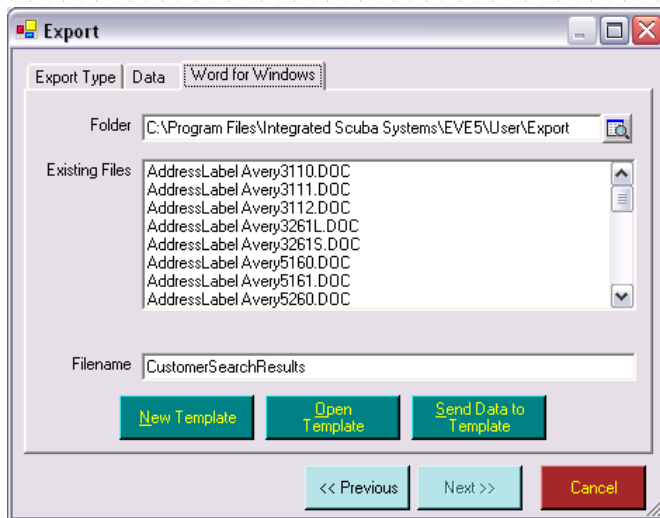
The 'Export Wizard' window is shown with the 'Data' tab selected. It features a title bar with 'Export' and standard window controls. Below the title bar are three tabs: 'Export Type', 'Data', and 'Word for Windows'. The 'Data' tab is active, displaying a list of columns on the left and a data grid on the right. The list on the left includes: CustID, StoreID, FirstName, MiddleInitial, LastName, KnownAs, Occupation, BirthDate, SexID, MaritalStatus, SourceID, Address1, Address2, Address3, Address4, and StateID. All items are checked. The data grid has columns: CustID, StoreID, FirstName, and Middle. It contains 10 rows of data. At the bottom, a message says 'Uncheck items in the list if you do not want to export that data.' Below this are three buttons: '<< Previous', 'Next >>', and 'Cancel'.

CustID	StoreID	FirstName	Middle
3658	1	ALBERT	
3852	1	ALEC	
4640	1	ALLIE	
5552	1	ANDREA	
5854	1	ANTHONY	
6078	1	AHMED	
7025	1	ALI	
7080	1	A.	
9723	1	ANNMARIE	
11356	1	Antoni	
11809	1	Anne	
12243	1	Annmarie3	

When the Export form opens, data in all columns that can be exported are shown in the grid. If you do not want to export data from certain columns remove the check mark from the column titles in the list on the left hand side of the form. The columns are made invisible and the data for those columns will not be exported.

NOTE: there is no harm in exporting the data from columns in which you are not interested. However, if you are exporting a lot of data the process is speeded up if you only export what is necessary.

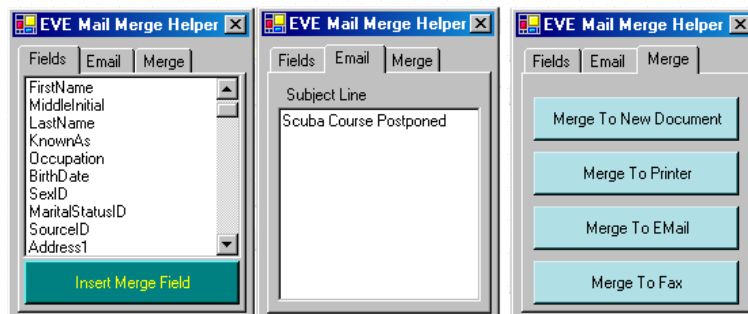
18.5.1 Microsoft Word or Email Exports



A list of available Microsoft Word documents is displayed. The left button's caption changes to 'New Template' and the right button's caption changes to 'Send Data to Existing Template'. An **Open Template** button is also available.

New Template

If you click **New Template**, Microsoft Word is opened automatically and a new blank mail merge document is created with the name specified. A data file is automatically created containing the data you are exporting and attached to the new document. You can now type your letter/document using Microsoft Word and insert merge-fields to act as placeholders that will be replaced by data by EVE. For information on how to do this, please read the Microsoft Word documentation. An EVE Mail Merge Helper form will be displayed to assist you in the process.



The first page shows a list of fields that are included in the export data file. You can double click on these (or select them and click **Insert Merge Field**) to add them to your Microsoft Word document. For instance, if you are writing a letter, you could start by typing "Dear " into the letter and then double clicking on **FirstName** in the Mail Merge Helper. EVE will insert **{{FirstName}}** into the letter and this will be replaced by data from EVE when you perform the Merge later, i.e. you will get multiple letters starting for example:

- ❖ Dear John
- ❖ Dear Mary, etc.

If you are creating an email, the second page the Mail Merge Helper is where you would type the Subject line of the email

The final page of the Helper is where you indicate which action you want to take. The options are:

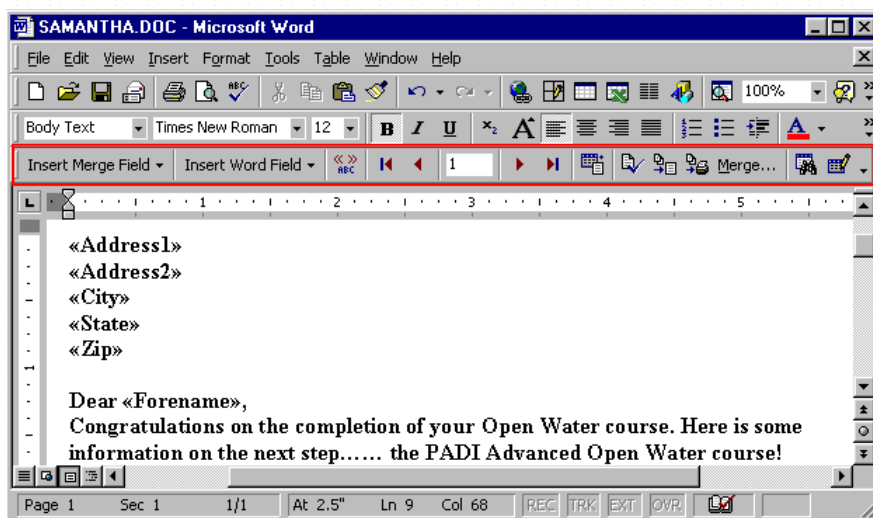
Merge to New Document:	Creates a new document in Microsoft Word containing one letter for each row of data you exported from EVE. Each letter is separated by a Section break so when you print it, each one will be printed on a different sheet of paper
Merge to Printer	Bypasses the new document stage and prints the document straight away. Again, one letter will be printed for each row of data you exported
Merge to Email	Sends one email for each row of data exported. Obviously this option is only appropriate if you exported customer data and is not appropriate if you exported e.g. Purchase Order information
Merge to Fax	Similar to Merge to Printer, this will send pages to your Fax machine rather than the printer.

Note: the Mail Merge Helper just helps you perform actions that can all be performed directly in Microsoft Word. If the security settings on your computer are set to strict, Windows may issue you with security warnings when you use the Mail Merge Helper to send emails since Windows does not know whether the process sending the emails is malicious or not. If this happens and you do not want to reduce the security settings on your computer, you may choose to use Microsoft Word directly to send the emails.

Creating Mail Merge Emails

Microsoft Word can be used in conjunction with EVE to create personally addressed letters and emails. Here is a very brief overview of some features of Microsoft Word that you may find useful. Please read your Microsoft Word documentation for a complete description.

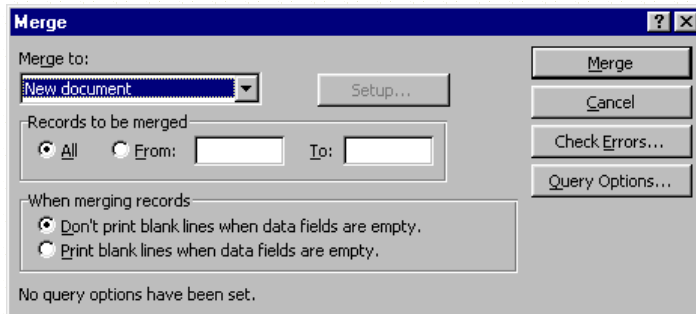
Type your mail-merge letter (or email) as you would any other letter.



To insert personal data (for example, the customer's name, address, etc.) use EVE's Mail Merge Helper as described above or click on the **Insert Merge Field** toolbar button in Word. A pop up list box appears, listing all the available data names that may be inserted. When you click on one a 'placeholder' is inserted into the letter. In the image above, six placeholders have been inserted for <<Address1>>, <<Address2>>, <<City>>, <<State>>, <<Zip>> and <<Forename>>. To get an idea of how the final letter (or email) will appear, you can click on the **Merge button**. One line of data is merged with the document - i.e. the placeholders are replaced with real data. This button (and most other **Mail Merge buttons**) is disabled until at least one merge field (placeholder) has been added to the document.

If you are composing a letter, when you have completed formatting it, do the final merge by clicking on the **Merge to New Document** button.

If you are composing an email, to send it to all people in the mail-merge data file that have a valid email address, click on the **Merge** button. A form is displayed.



By default, Word inserts the text of the resulting merged document in the e-mail message. If you want to preserve the formatting of a merged document, click **Setup...** and put a check mark against Send document as an attachment check box. In this case, Word sends each merged document as a separate Word document that is attached to the e-mail message. Click on the **Merge** button to send the email(s).

Creating Mail-Merge Label Documents

In Word, click on the **Tools** menu and select Mail Merge... The Mail Merge Helper dialog box is displayed. Click the **Create** button and select Mailing Labels from the popup menu. A message is displayed with two buttons. Choose Change Document Type. Click on the **Setup...** button on the Mail Merge Helper dialog box. Another dialog box called Label Options is displayed. A list of available label formats is shown. Choose the appropriate one for your label paper - if Avery produces your labels then there is probably a reference number on each label sheet that matches an item in the list. Click **OK**. Another dialog box called Create Labels is displayed. Click **Insert Merge Field** and select the fields that you want on your labels (probably Address1, Address2, Address3, Address4, State and Postcode). Press the Enter key after selecting a field so that each one appears on a different line. Click **OK**.

Close the Mail Merge Helper (by clicking the **Close** button) and the document in Word should now show all the data 'placeholders' that you selected. Continue with the Mail Merge as described above.

NOTE: this is a 'once-only' procedure. When you have created the labels template you can re-use it any number of times.

Existing Template

If you click **Send Data to Existing Template** Microsoft Word is opened automatically, the template specified is opened and a data file is merged with the existing document.

Several example mail merge documents are supplied with EVE that allow you to print standard letters and mailing labels. You can modify these as you wish.

Labels.doc and the AddressLabelAveryXYZ.doc documents allow you to print mailing labels. If you use label sheets with different dimensions than those in these files, use Microsoft Word to modify the document appropriately (i.e. add more label entries by copying and pasting existing entries or delete entries and resize the table cells). Alternatively, create a new labels template from scratch.

Several of the example documents contain address fields. When sending letters to addresses overseas you will want to include the Country in the address, but you will want to omit it for home country addresses. Labels.doc gives an example of how to achieve this. A Word Field

has been added that compares the country in the address data with that of your dive center. If they are the same, the country is omitted. Because EVE does not know in which country your dive center is located you will need to modify Labels.doc by inserting your home country into the document. Open Labels.doc in Microsoft Word and click on the **Tools** then **Options** menu. On the View tab put a check mark in the Field Codes box and click **OK**. You should now see several instances of the following text:

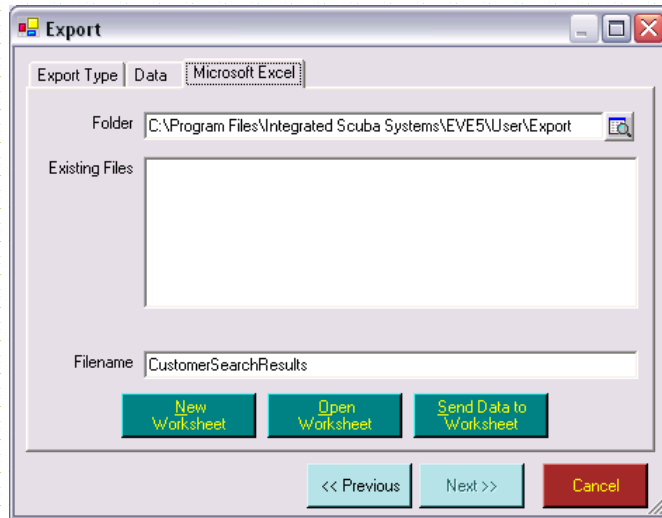
```
{IF {MERGEFIELD Country} = "HOME COUNTRY" "" {MERGEFIELD COUNTRY}}
```

Replace each occurrence of "HOME COUNTRY" with the name of your country exactly as it appears in the Stores section of the Data Module, enclosed in double quotes.

Open Template

If you select Open Template, the template is opened without any data being merged. You can review the template document and make any required changes.

18.5.2 Microsoft Excel Exports



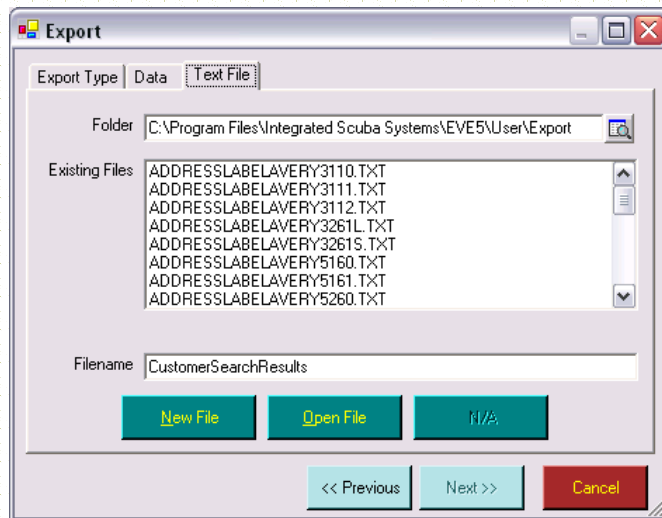
When you are exporting data to Excel, the left button's caption changes to 'New Worksheet' and the right button is labeled 'Send Data to Worksheet'. An 'Open Worksheet' option is also available.

If you click **New Worksheet**, Microsoft Excel is opened automatically and a new blank worksheet is created containing your data with the name specified.

If you click **Send Data to Worksheet**, a form is shown so you can choose at which column and row you want the data to be inserted. Then, Microsoft Excel is opened and the data inserted. You might want to use this option, for example, if you have a pre-prepared spreadsheet that contains special formatting or charts that are based on data held elsewhere in the spreadsheet. Then, you can periodically send data to the same worksheet and see the charts adjust based on the new data.

If you select Open Worksheet, the template is opened without any data being merged. You can review the template document and make any required changes.

18.5.3 Text File Exports



A list of available text files is displayed. You can select the **Open File** button to open an existing file or click **New File** to create a new comma separated text file containing the export data. If the file exists already, you will be asked if you are prepared to 'Overwrite' the existing information and should choose Yes.

You may want to use this type of file to export information from EVE to import into another compatible package.

18.6 Report Groups

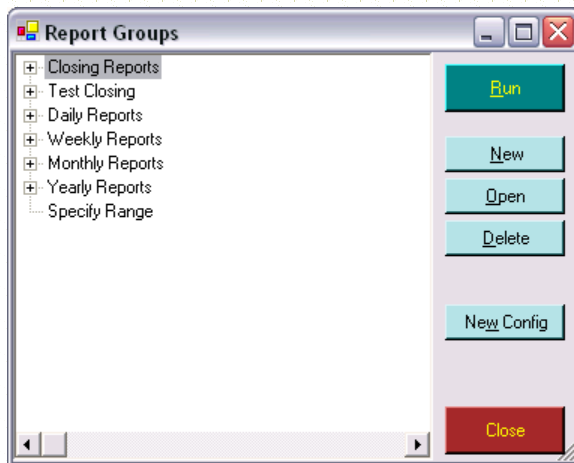
Periodically, you may want to run a selection of reports. For instance, at the end of each day you might want to run the Till Reconciliation report, Profit Center Breakdown report and Commission Report. At the end of each week, you might want to run the Tax Breakdown report and Manufacturer report, etc. Use the Report Groups form to group together a selection of reports that can all be run off together. By default, EVE is supplied with 6 standard groups:

- ❖ Closing (and Test Closing)
- ❖ Daily Reports
- ❖ Weekly Reports
- ❖ Monthly Reports
- ❖ Yearly Reports
- ❖ Specify Range

Load the Report Groups form by selecting Report Groups from the **File** menu.

You can define which reports are included in each group. You can also create new groups and delete or modify existing groups.

18.6.1 Running Period Reports

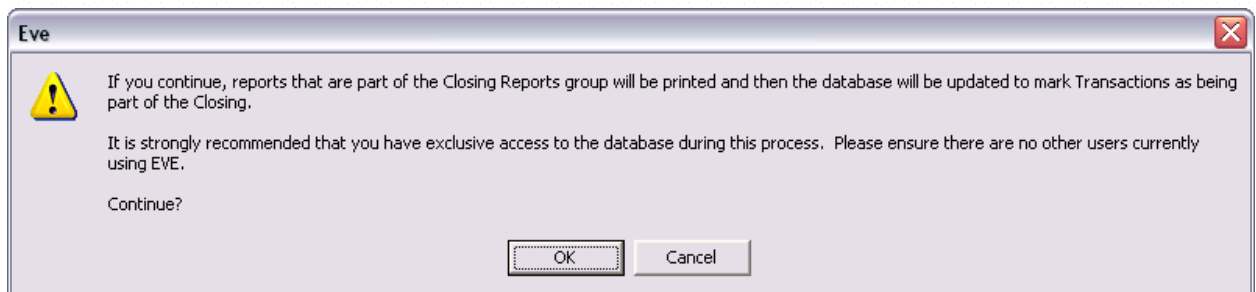


Click the **Run** button to run the selected report group.

Closing

This is the report group that you will use most often - usually at the end of every day. When this report group is run, EVE runs each constituent report and includes all data that was added since the report group was last run. So, if you run the report group at the end of the day and then again immediately, all reports from the first run will contain data and all reports from the second run will contain no data.

It is strongly recommended that you have exclusive access to the database when running closing reports.



These reports must be sent to the printer, email or text file. If you want to review the reports before completing the closing, run Test Closing and choose to output them to the screen.

Daily

When this report group is run, EVE runs each constituent report and includes all data that was added today.

Weekly, Monthly & Year End

When these report groups are run, EVE runs each constituent report and includes all sales data that was added during the week, month or year respectively.

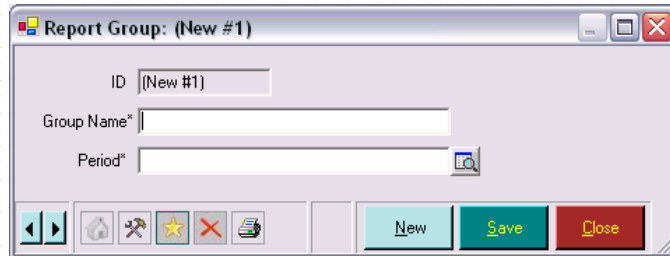
Specify Range

When this report group is run, EVE prompts you to enter a date range. It then runs each constituent report and includes all data that was added in the range.

18.6.2 Creating a New Report Group

New

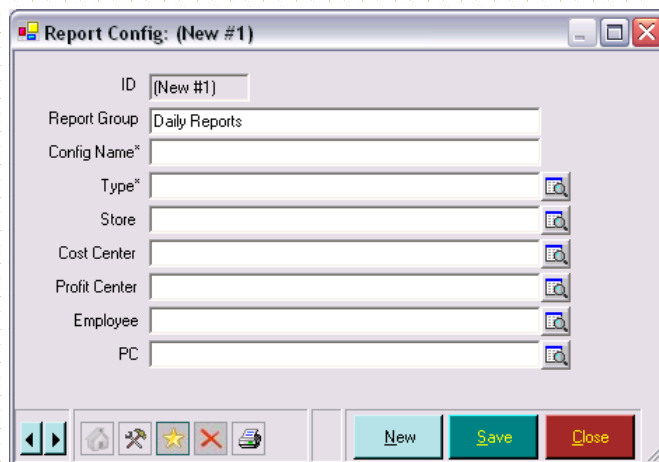
Click **New** to create a new report group. You will not usually need to do this since EVE probably contains all the report groups you will need.

The screenshot shows a dialog box titled "Report Group: (New #1)". It has three input fields: "ID" with the value "(New #1)", "Group Name*" which is empty, and "Period*" which is empty. Below the fields is a toolbar with icons for navigation and actions. At the bottom right are three buttons: "New" (light blue), "Save" (green), and "Close" (red).

EVE prompts you to enter a name for the new group and to specify a period type. If you choose 'Specify Range', whenever you run the new report group in future, EVE will prompt you to enter a date range. All reports in the group will include data in that date range. If you choose 'Start of the Day', all reports in the group will include data entered on the day the group is run, etc.

New Configuration

Select a report group and then click **New Config** to create a new report that is part of the group.

The screenshot shows a dialog box titled "Report Config: (New #1)". It has several input fields: "ID" with the value "(New #1)", "Report Group" with the value "Daily Reports", "Config Name*" which is empty, "Type*" which is empty, "Store" which is empty, "Cost Center" which is empty, "Profit Center" which is empty, "Employee" which is empty, and "PC" which is empty. Each field from "Type*" down to "PC" has a magnifying glass icon to its right. At the bottom right are three buttons: "New" (light blue), "Save" (green), and "Close" (red).

Choose a Report Type (for example, Payment Details Report or Commission Detail Report, etc.) and specify any parameters you choose. The Period section of the form is not shown, as the report will inherit its period from the report group. You must specify a Config Name to identify the report.

18.6.3 Editing Report Groups

Open

What happens when you click the **Edit** button depends on what type of entity is selected when you click it.

Report Group: Daily Reports

ID: 3

Group Name*: Daily Reports

Period*: From the Start of the Day

Buttons: New, Save, Close

If a report group is selected, the above form is shown and you can edit the group name and/or the period.

Report Config: Daily Payment Details Report

ID: 6

Report Group: Daily Reports

Config Name*: Daily Payment Details Report

Type*: Sales Reports - Payment Details Report

Store:

Cost Center:

Profit Center:

Employee:

PC:

Buttons: New, Save, Close

If a report is selected, the form above is shown so you can edit the report parameters.

Delete

If you click **Delete** when a report group is selected, the group and all of its associated reports will be permanently deleted from the database. If you click it when a report is selected, only that report will be deleted.

19 QUICKBOOKS

19.1 Setting up QuickBooks

19.1.1 Introduction to QuickBooks

EVE can export sales data to the QuickBooks accounting program from Intuit.

EVE exports data by 3 categories: profit centers, payment method, and tax band. When the export is run, EVE first groups together all sales information based on the profit centers of each item sold in the period. It then groups together all payments in the period based on the payment method. Finally, it groups together all tax items in the period based on the tax band. You can link each profit center, payment method and tax band to those accounts you have pre-defined in QuickBooks. When data is exported, it is added as a number of general journal entries in QuickBooks.

QuickBooks expects all sales data to be imported as a series of “transaction” lines. Each transaction line will have one or more “distribution” lines associated with it. The sum of the values on the distribution lines will balance the value on the associated transaction line. Each transaction line and each distribution line will reference a (usually different) QuickBooks account.

Note: a QuickBooks “transaction” in this case is an import record and should not be confused with an EVE transaction (i.e. an invoice, refund, etc) - for example, a QuickBooks “transaction” may represent the sum of all diving equipment sales on invoices in the period all grouped together into one line for import.

For example, imagine an invoice is created for a Wetsuit and a Course. The Wetsuit costs \$150 and the course costs \$300. Let us assume that the Wetsuits stock type is in a Diving Equipment profit center which is linked to a Product Sales account in QuickBooks and the Courses stock type is in a Course Revenue profit centers in EVE which is linked to a Dive Lessons account in QuickBooks.

Imagine the customer paid \$200 on his visa card and \$250 in cash. Let us assume that the Cash payment method has been linked to a Cash account and the Visa payment method has been linked to a Credit Card account in QuickBooks. In this case there is no way for EVE to tell how much of the cash amount went towards paying for the Wetsuit and how much went towards paying for the Course. The same applies to the Visa payment. The way that EVE produces its QuickBooks transaction and distribution lines is as follows:

- ❖ The transaction line for all sales information credits an accounts receivable account. The associated distribution line debits the appropriate account (governed by the Profit Centers -> account link) by the same amount.
- ❖ The transaction line for all payments debits the same accounts receivable account. The associated distribution line credits the appropriate account (governed by the payment method -> account link) by the same amount.

In the example given above:

	Transaction Type	Account	Amount
Transaction Line	General Journal	Accounts Receivable	\$150
Distribution Line	General Journal	Product Sales	-\$150

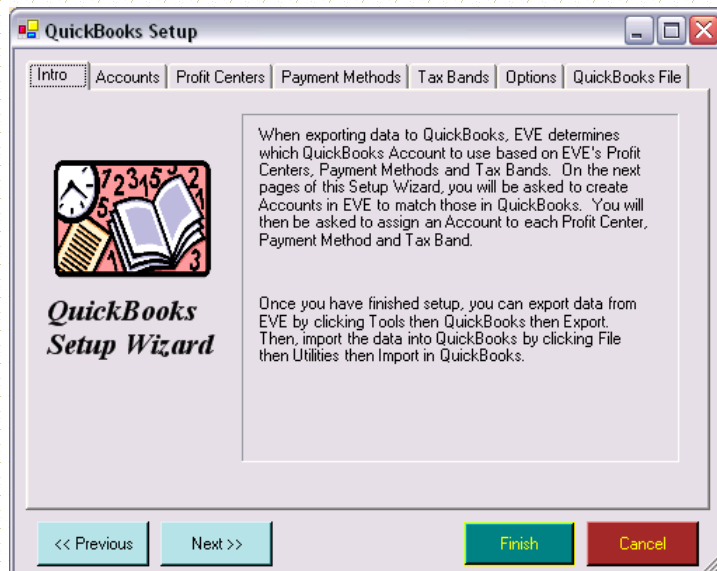
Transaction Line	General Journal	Accounts Receivable	\$300
Distribution Line	General Journal	Dive Lessons	-\$300
Transaction Line	Deposit	Credit Card	\$200
Distribution Line	Deposit	Accounts Receivable	-\$200
Transaction Line	Deposit	Cash	\$250
Distribution Line	Deposit	Accounts Receivable	-\$250

The accounts receivable account acts as a “storage area”. In each transaction/distribution combination one half of the equation credits or debits the accounts receivable account and the other half credits or debits a different account by the same amount. The end balance on each account in this example is shown below:

Account	Balance
Product Sales	-\$150
Dive Lessons	-\$300
Credit Card	\$200
Cash	\$250
Accounts Receivable	\$0

19.1.2 QuickBooks Setup Wizard

Access the QuickBooks Setup Wizard in the **Tools** menu under QuickBooks.



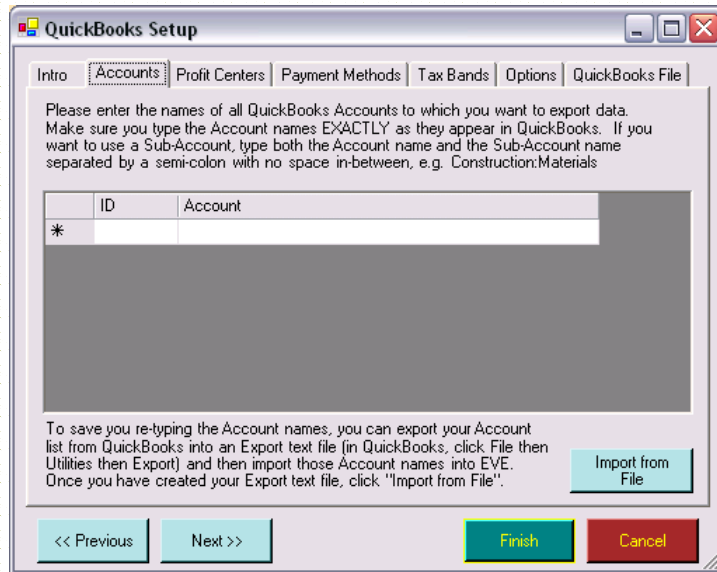
Before running the QuickBooks export feature in EVE for the first time, you must use the QuickBooks Setup Wizard. This allows you to inform EVE of the way you want the data to appear in QuickBooks.

The Wizard comprises a number of tabs.

Introduction

The Introduction tab gives an introduction to the way the following tabs work.

Accounts



Use the Accounts tab of the Setup Wizard to enter details of the account names you pre-defined in QuickBooks. EVE will export data to these accounts. You can either add account names by typing straight into the grid (enter new records by scrolling to the first blank row at the bottom of the grid), or by importing the names using the **Import from File** button (recommended). To use this method, first export your account names from QuickBooks. Do this as follows:

- ❖ Start QuickBooks and load your company file.
- ❖ Click **File** and then **Utilities** and then **Export**
- ❖ Click **Chart of Accounts** and then **OK**
- ❖ Enter a filename and save the file
- ❖ Switch back to EVE and load the Accounts tab of the QuickBooks Setup Wizard
- ❖ Click **Import from File**. Select the filename you used above and click **Open**.

Note: Sub-accounts will show in the grid with their parent account, separated by a colon. For example, Cash:Checking or Sales:Dive Lessons, etc.

EVE does not need to know the type of each QuickBooks account - it will just export data to the accounts you specify regardless of the type.

Profit Centers

The Profit Centers in EVE will determine to which QuickBooks Account sales information is exported. Please assign to each Profit Center the appropriate QuickBooks Account name.

Profit Center	Sales Account	COGS Account
▶ Air Fills (4060)		
Charters (4070)		
Courses (4040)		
Diving Equipment (402		
Freight		
Gift Certificates		
Instructional Material (
Misc		
Other Retail (4020)		
Pay Outs		
Payment on Account		

<< Previous Next >> Finish Cancel

In EVE, each stock item (i.e. SKU) has a Stock Type and each Stock Type has a Profit Center. Many Stock Items can be linked to one Stock Type and many Stock Types can be linked to one Profit Center.

EVE can therefore determine which profit center each stock item relates to. Whenever a stock item is sold in the Sales Module, EVE keeps track of which profit center was credited.

Using the Profit Center tab of the QuickBooks Setup Wizard you can assign a QuickBooks account to each EVE profit center. When data is exported, EVE groups together all sales by profit center and then exports one row to that Profit Centers account.

For example, sales of Stock Items that fall in the “diving equipment” profit center could be linked to your “sales: product sales” account while sales of Stock Items that fall in the “classes” profit center could be linked to your “sales: dive lessons” account. More than one profit center can be linked to the same account.

For example, sales of Stock Items that fall in the “diving equipment” and “classes” profit centers could both be linked to your “sales: product sales” account - it is your choice.

You will want to link most Profit Centers to accounts that are defined as income accounts in QuickBooks. However, if you have a pay outs profit center in EVE or equivalent (i.e. one that is used to hold transactions representing money leaving the cash drawer, for example, to purchase drinks for the sales staff, etc.) You could link this to an expense account. We advise that you link the gift certificates profit center to an account called Unredeemed Gift Certificates, or equivalent, which has an account type of Other Current Liability.

Each EVE profit center must also be linked to a COGS (Cost of Goods Sold) account and to an Inventory account. EVE will credit the COGS account with the sum of the amounts that you purchased the items for from your suppliers. The inventory account will be debited by the same amount.

Payment Methods

The Payment Methods in EVE will determine to which QuickBooks Account payment information is exported. Please assign to each Payment Method the appropriate QuickBooks Account name.

Payment Method	Account
Cash	
Check	
Debit Card	
Gift Card	
Gift Certificate	
Master Card	
On Account	
Other - See Notes	
Visa	
Voucher	

<< Previous Next >> Finish Cancel

When a payment is made in EVE, it must always have a payment method, for example, cash, Visa, etc. Using the payment methods tab of QuickBooks Setup Wizard you can assign a QuickBooks account to each EVE payment method. When data is exported, EVE groups together all payments by payment method and then exports one row to that payment methods account.

For example, payments made by “cash” could be linked to your “cash: checking” account. Payments made by “Visa” could be linked to your “cash: credit cards” account. More than one payment methods can be linked to the same account. For example, payments made by “MasterCard” and “Visa” could both be linked to your “cash: Credit Cards” account - it is your choice.

You will want to link most payment methods to accounts that are defined as bank accounts in QuickBooks. One exception is the “On Account” payment method which should be linked to an Accounts Receivable account.

Tax Bands

The Tax Bands in EVE will determine to which QuickBooks Account tax information is exported. Please assign to each Tax Band the appropriate QuickBooks Account name.

Tax Band	Account	Tax Agency
GST		
GST & PST		
No Sales Tax		
PST		

<< Previous Next >> Finish Cancel

Use the Tax Bands tab of the Setup Wizard to link all tax bands in EVE to a QuickBooks account. Each tax band must also have a tax agency. You can choose the tax agency from a drop down list that comprises all entries on the supplier file (you can add a new supplier in the suppliers section of the Data Module (See Section 5.1.7.Suppliers)).

Options

The screenshot shows the 'Options' tab of the QuickBooks Setup wizard. It contains the following fields and options:

- Accounts Receivable Account:** Accounts Receivable
- Accounts Payable Account:** Accounts Payable
- Account to hold Unredeemed Gift Certificates:** Unredeemed Gift Certificates
- Account to hold Unredeemed Gift Card Sales:** Unredeemed Gift Card Sales
- Account to hold Unredeemed Vouchers:** Unredeemed Vouchers
- Account to hold Freight on PO Invoices:** Freight Out
- Customer Name to apply to Accounts Receivables (e.g. 'EVE A/R'):** EVE A/R
- Vendor Name to apply to Accounts Payables (e.g. 'EVE A/P'):** EVE A/P
- Date format (e.g. MM/dd/yy in US, dd/MM/yy in UK, etc):** MM/dd/yy
- Export Options (all checked):**
 - ☒ Export Sales Data
 - ☒ Export COGS Data
 - ☒ Export Purchasing Data
- Amalgamation of Values when Accounts match:**
 - ☒ None
 - ☐ Simple
 - ☐ Extended

Navigation buttons at the bottom: << Previous, Next >>, Finish, and Cancel.

Use the options tab of the Wizard to inform EVE of:

- ❖ The name of your accounts receivable account - usually this will be called “Accounts Receivable”.
- ❖ The name of your accounts payable account - usually this will be called “Accounts payable”. This is only used if you export Purchasing data
- ❖ The name of the account you want to receive information about unredeemed gift certificates (this will usually be an account of type “other current liability”).
- ❖ The name of the account you want to receive information about unredeemed gift cards (this will usually be an account of type “other current liability”).
- ❖ The name of the account you want to receive information about unredeemed vouchers (this will usually be an account of type “other current liability”). This is only present for backwards compatibility with EVE4 as Vouchers are not supported in EVE5.
- ❖ The name of the account you want to receive information about Freight on Invoices raised against Purchase Orders - i.e. amounts entered on the PO Invoice form in the “Freight” box.
- ❖ The name of the customer you want all imported Sales data to be linked to. Make sure a customer with this name exists in QuickBooks before you do your first export from EVE.
- ❖ The name of the vendor you want all imported Purchase Order data to be linked to. QuickBooks requires all imported transaction data to be linked to a vendor. You could use the name of your store, or simply Store Closing. Make sure a vendor with this exact name exists in QuickBooks before you do your first export from EVE.
- ❖ The format of dates. The format you use will depend on how your computer is set up in the regional settings of your control panel. You will usually use either MM/dd/yy or dd/MM/yy. If you are unsure, you can run a test export from EVE and then import the

data into a copy of your QuickBooks company file. QuickBooks will give an error if it does not like the Date Format used.

- ❖ Indicate the types of information you want to export. By default, Sales, COGs and Purchasing information is exported.
- ❖ As mentioned above, information is grouped by profit center before being exported. If you want to, you can link multiple profit centers to the same QuickBooks account. E.g. if you have profit centers called 'Diving Equipment', 'Swimming Equipment' and 'Surfing Equipment' you could link them all to a QuickBooks account called e.g 'Equipment Sales'. This would result in 3 general journal entries being created in the Equipment Sales account in QuickBooks, one for each profit center. To change this behavior so only one general journal entry is created in this case, choose the "Simple" option in the "Amalgamation of Values..." section. Choose the "Extended" option if you want to export the results with only one Accounts Receivable Transaction line and multiple Distribution lines representing the other accounts being exported.

Below is an example of a file created with the "None" option in the "Amalgamation of Values..." section.

	A	B	C	D	E	F	G	H	J
1	ITRNS	TRNSID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
2	ISPL	SPLID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
3	ENDTRNS								
4	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	795.58	#36. 30Jul12:Diving Equipment
5	SPL		GENERAL JOURNAL	7/30/2012	Sales:Product Sales		ACME Diving	-795.58	#36. 30Jul12:Diving Equipment
6	ENDTRNS								
7	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	229.79	#36. 30Jul12:Classes
8	SPL		GENERAL JOURNAL	7/30/2012	Sales:Dive Lessons		ACME Diving	-229.79	#36. 30Jul12:Classes
9	ENDTRNS								
10	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	400	#36. 30Jul12:Childrens Equipment
11	SPL		GENERAL JOURNAL	7/30/2012	Sales:Product Sales		ACME Diving	-400	#36. 30Jul12:Childrens Equipment
12	ENDTRNS								
13	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	127.6	#36. 30Jul12:State Tax
14	SPL		GENERAL JOURNAL	7/30/2012	Sales Tax Payable	Customs & Excise	ACME Diving	-127.6	#36. 30Jul12:State Tax
15	ENDTRNS								
16	TRNS		GENERAL JOURNAL	7/30/2012	Cash:Checking	EVE A/R	ACME Diving	752.97	#36. 30Jul12:Cash
17	SPL		GENERAL JOURNAL	7/30/2012	Accounts Receivable		ACME Diving	-752.97	#36. 30Jul12:Cash
18	ENDTRNS								
19	TRNS		GENERAL JOURNAL	7/30/2012	Cash:Checking	EVE A/R	ACME Diving	800	#36. 30Jul12:Check
20	SPL		GENERAL JOURNAL	7/30/2012	Accounts Receivable		ACME Diving	-800	#36. 30Jul12:Check
21	ENDTRNS								

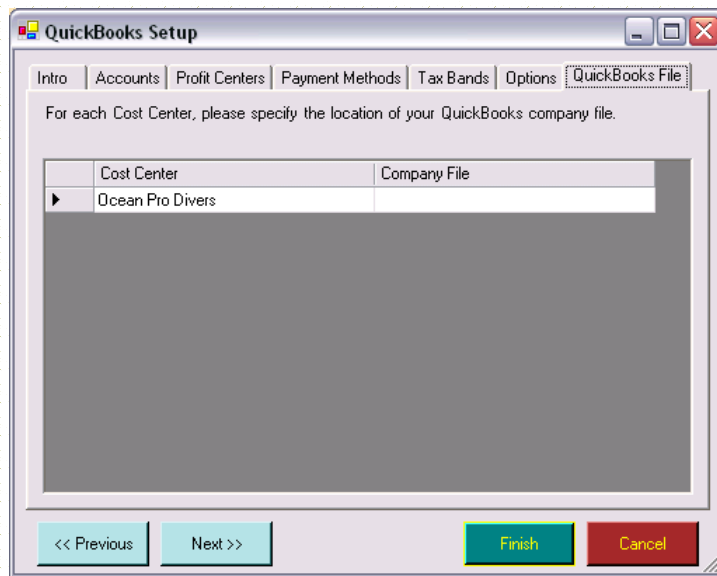
Below is an example of a file created with the "Simple" option. Note: the Diving Equipment and Childrens Equipment lines have been merged and so have the Cash and Check lines.


	A	B	C	D	E	F	G	H	J
1	ITRNS	TRNSID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
2	ISPL	SPLID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
3	ENDTRNS								
4	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	1195.58	#36. 30Jul12:Diving Equipment/Childrens Eq
5	SPL		GENERAL JOURNAL	7/30/2012	Sales:Product Sales		ACME Diving	-1195.58	#36. 30Jul12:Diving Equipment/Childrens Eq
6	ENDTRNS								
7	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	229.79	#36. 30Jul12:Classes
8	SPL		GENERAL JOURNAL	7/30/2012	Sales:Dive Lessons		ACME Diving	-229.79	#36. 30Jul12:Classes
9	ENDTRNS								
10	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	127.6	#36. 30Jul12:State Tax
11	SPL		GENERAL JOURNAL	7/30/2012	Sales Tax Payable	Customs & Excise	ACME Diving	-127.6	#36. 30Jul12:State Tax
12	ENDTRNS								
13	TRNS		GENERAL JOURNAL	7/30/2012	Cash:Checking	EVE A/R	ACME Diving	1552.97	#36. 30Jul12:Cash/Check
14	SPL		GENERAL JOURNAL	7/30/2012	Accounts Receivable		ACME Diving	-1552.97	#36. 30Jul12:Cash/Check
15	ENDTRNS								

Below is an example of a file created with the "Extended" option.

	A	B	C	D	E	F	G	H	J
1	ITRNS	TRNSID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
2	ISPL	SPLID	TRNSTYPE	DATE	ACCNT	NAME	CLASS	AMOUNT	MEMO
3	ENDTRNS								
4	TRNS		GENERAL JOURNAL	7/30/2012	Accounts Receivable	EVE A/R	ACME Diving	0	#36. 30Jul12:
5	SPL		GENERAL JOURNAL	7/30/2012	Sales:Product Sales		ACME Diving	-1195.58	#36. 30Jul12:Diving Equipment/Childrens Eq
6	SPL		GENERAL JOURNAL	7/30/2012	Sales:Dive Lessons		ACME Diving	-229.79	#36. 30Jul12:Classes
7	SPL		GENERAL JOURNAL	7/30/2012	Sales Tax Payable	Customs & Excise	ACME Diving	-127.6	#36. 30Jul12:State Tax
8	SPL		GENERAL JOURNAL	7/30/2012	Cash:Checking	EVE A/R	ACME Diving	1552.97	#36. 30Jul12:Cash/Check
9	ENDTRNS								

QuickBooks File(s)



The grid on the company files tab of the Setup Wizard will have one row for each Cost Center you have defined in EVE. A Cost Center corresponds to a company - some stores have multiple companies set up to run their store - for example, they may have one called Acme Retail to run their shop and another called Acme Training to run their classes. Typically, each Cost Center will correspond to an individual QuickBooks company file. Highlight a row in the grid and click on the  button in the Company File column to link the Cost Center to the appropriate QuickBooks company file.

19.2 Exporting Data to QuickBooks

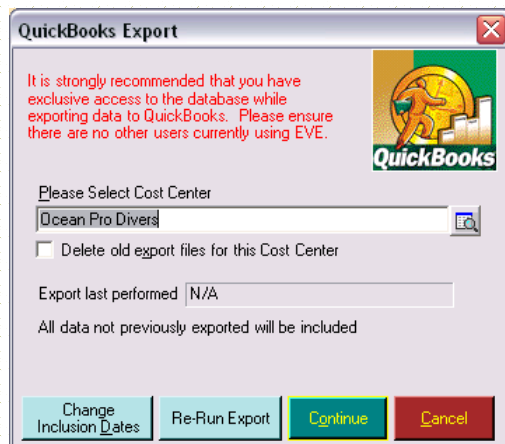
19.2.1 Running the QuickBooks Export

When you have completed all tabs of the QuickBooks Setup Wizard, you are ready to try the export. It is a two-stage process:

- ❖ Export the data from EVE to a file. This file has an IIF extension.
- ❖ Import the data into QuickBooks. Do this by loading your company file in QuickBooks and then clicking **File** then **Utilities** then **Import**.

To perform stage one, use the Export option under QuickBooks in the **Tools** menu.

QuickBooks Export

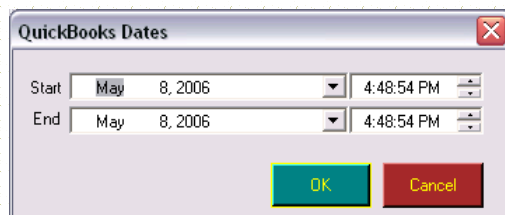


The list will have one entry for each Cost Center you have defined in EVE. If you have more than one Cost Center you will need to run the export for each one (as each Cost Center corresponds to a different physical company). Select the Cost Center you want to deal with. Each time you run the export, an export file is produced. By default the file is located in c:\Program Files\Integrated Scuba Systems\User\Export and is called qb_***_yyy.iif where *** is the name of the Cost Center and yyy is the date/time the export was performed. As mentioned above, once the export file is created, you need to import it into QuickBooks. EVE has no way of knowing when and if you have imported that data, and so it cannot delete the file at this time. If you are not careful you may end up with a number of IIF files in your export folder so be careful to import the correct one. If you check the delete old export files for this Cost Center box, EVE will delete all existing IIF files for the Cost Center before running the new export.

Usually, you will click **Continue** at this point to export all data that has not previously been exported. As part of the export process, EVE will assign an accounting period (comprising a unique ID and the date/time of export). Each EVE transaction included in the export file will be updated with the accounting period ID. This allows you, at a later date, to determine exactly which transactions were included.

Change Inclusion Dates

In some circumstances, you may want to create an export file containing data in a specified date range. In this case, click **Change Inclusion Dates**.



Choose your date range and click **OK** to create the export file.

Re-Run Export

In some cases you may want to re-run an export for a particular accounting period. In this case, click **Re-Run Export**. This lists all previous accounting periods so you can choose one. When you then click **Continue** to start the export, data that is part of the selected accounting period will be exported.

20 OTHER BUSINESS TRANSACTIONS

20.1 Update Multiple Rows

Sometimes you need to update multiple rows of data at once. For instance, maybe you have decided to split your boot inventory into Tropical boots and Cold Water boots.

You can use the Update Multiple Rows option. First, select the type of data you want to update. You will be able to access the Update Multiple Rows option in any Search box within the system. For example, if you have decided to split your boot inventory into Tropical boots and Cold Water boots, you would open Stock Items from within the Inventory Module and use the Find option to bring up the Stock Item Search box. From there you would set the Stock Type filter to Boots.

The screenshot shows the 'Stock Item Search' window with the 'General' tab selected. The 'Stock Type' is set to 'Boots'. The search results table is as follows:

Stock Item	Stock #	Stock Type	Manufacturer	ID	Retail Price	No. In
3mm HD Tropical Boot BLK 04	044907 BLK...	Boots	Fitzwright Man...	25629	\$54.95	
3mm HD Tropical Boot BLK 05	044907 BLK...	Boots	Fitzwright Man...	25630	\$54.95	
3mm HD Tropical Boot BLK 06	044907 BLK...	Boots	Fitzwright Man...	25631	\$54.95	
3mm HD Tropical Boot BLK 07	044907 BLK...	Boots	Fitzwright Man...	25632	\$54.95	
3mm HD Tropical Boot BLK 08	044907 BLK...	Boots	Fitzwright Man...	25633	\$54.95	
3mm HD Tropical Boot BLK 09	044907 BLK...	Boots	Fitzwright Man...	25634	\$54.95	
3mm HD Tropical Boot BLK 10	044907 BLK...	Boots	Fitzwright Man...	25635	\$54.95	
3mm HD Tropical Boot BLK 11	044907 BLK...	Boots	Fitzwright Man...	25636	\$54.95	
3mm HD Tropical Boot BLK 12	044907 BLK...	Boots	Fitzwright Man...	25637	\$54.95	
3mm HD Tropical Boot BLK 13	044907 BLK...	Boots	Fitzwright Man...	25638	\$54.95	
3mm Surf Socks BK M	202550BK M	Boots	Oceaner Sporti...	22849	\$34.95	

At the bottom of the window, it says 'Found: 76' and 'Do Not Show Unavailable'.

If you want to update all rows of a particular data type, set focus to the search box and press CTRL+A to highlight all rows. Otherwise, use the mouse and click on the items while holding down the CTRL or Shift keys to highlight a subset of the rows. Once you have selected the rows you wish to update, right mouse click on the selected area to bring up an Options pop up box and choose Update Multiple Rows.

Update Multiple Rows

Please be **VERY CAREFUL** when using this form. You could irreparably damage your data if you are not careful. We recommend you take a database backup before proceeding and that you test your update on one or two rows first before applying it to a lot of rows.

Use this form to change a number of rows of data at once. For example, you could change all First Names and Last Names to be Upper Case.

Column(s) to Update

- ☐ StockItemID
- ☐ StockItem
- ☐ StockNo
- ☐ ManufacturerID
- ☐ StockTypeID
- ☐ SubStockTypeID
- ☐ PrimaryColorID
- ☐ SecondaryColorID
- ☐ SizeID
- ☐ Unavailable
- ☐ BarcodeNo

☒ Change Value To:

☐ Change Case To:

The list at the top shows one entry for each column in the search results grid. Put a check mark against each that you want to update. Next, choose the operation you want to perform by selecting one of the options: Change Value To or Change Case To. To change the actual data values in the column(s), use the first option. To change the case (i.e. upper case, lower case or mixed case) choose the second option. In our example, we would select the StockTypeID and choose the Change Value To option. At this point, we would enter in the ID number of the Tropical Boots stock type or the Cold Water boot stock type as appropriate. Click **Update**.

Be very careful when using this form as you may irreparably damage your data if you are not careful. If you are updating a large number of rows we recommend you take a backup of your Back-End database before using the form.

When using the Change Value To options there are certain points to bear in mind:

- ❖ To perform a simple update of values, type the new value into the box next to the 'Change Value To' option. For example, to update the Commission Rate for all employees to be 5%, put a tick against 'Commission Rate' in the list at the top, type 5 into the 'Update Value To' box and click **Update**.
- ❖ In some columns, EVE uses ID values. For instance, each Stock Item has a Manufacturer. You will notice that if you change the name of the Manufacturer in the Suppliers section of the Data Module, the Manufacturer of each stock item that references it changes as well in the Stock Items section. This is because EVE stores the ID value of the Manufacturer against the Stock Item, not the name of the Manufacturer. For instance, let us assume that PADI has an ID of 2 in the Suppliers section. Behind the scenes, all PADI stock items reference ManufacturerID = 2. Every time EVE displays a stock item, it looks to see what the ID of the Manufacturer is and translates it to show 'PADI' rather than 2. If you want to update the Manufacturer (or any other column that uses ID values) on a number of Stock Items you must use the ID value in the 'Change Value To' box rather than the name - for example, enter 2 rather than 'PADI'.
- ❖ Sometimes you may want to update the data in one column to be the same as the data in another. For example, you may want to update the 'Known As' field on certain customers to be the same as the 'First Name'. To do this, put a check mark against Known As in the list and click the button to the right of the Change Value To box. EVE displays a list of all column names. Choose '[First Name]': EVE inserts [First Name] into the box. When you click the **Update** button, EVE cycles through each person that was selected. For each

person, it looks to see what his or her First Name is and updates the Known As field to be the same.

Be careful when using this form that you do not get duplicates. For instance, if you try to update the Barcode Number on all Stock Items to be 123456, EVE will report a Duplicate Error, because the Barcode Number on each stock item must be different.

21 PROTECTING YOUR DATA

21.1 User Privileges

One way to protect your data is to ensure unauthorized individuals do not gain access to your system. Setting user passwords will help protect you against this. Once you allow an individual access to EVE, you need to further restrict their ability to make changes within EVE. The following section describes how to limit access.

Open the Employee form for the user you are interested in. Click on the Employee item in the list on the left of the Employee form. If this is not visible, make sure there is a tick in the Employee entry in the Customer Type list.

Select the type of security privilege you wish to define. There are four editing types of security that will allow you to create, edit, delete or void data. In addition, there are privilege types for each module type.

Click on each type in turn and a set of privileges appropriate for that type appears in the privileges list. Put a checkmark against whichever privileges you want to assign and then click **Save**.

When an employee logs on to EVE the privileges associated with that employee dictate how EVE is used. It is the privileges of the logged on user that drive how EVE will behave.

If you want to assign all of the privilege associated with a specific type, you can use the Select All button. To clear all the privileges associate with a specific type, use the Deselect All button. Use the Copy Privileges button to copy privileges from one employee to another.

If the user tries to perform an action that they are not authorized to perform (e.g. they try to delete an invoice), EVE will either show an error message or show an Authorization form that lets another user authorize the action by entering their username and password. This just authorizes the one action - it does not log that authorized user in. So, if the same user tries to delete another invoice, the same authorization form will be shown. Rather than authorizing a series of actions like this, the authorized user can, of course, log in himself instead.

Below is a description of the privileges that can be set for each type.

21.1.1 Editing Privileges

Can Create New ...	Choose the type of data that the user can enter into EVE. Each data element in EVE, regardless of the module in which it is found, is listed here.
Can Find...	Choose the type of data that the user can search upon.
Can View Saved...	Choose the type of data that the user can open the Data Entry form for.
Can Edit Saved ...	Choose the type of data that the user can edit. Each data element in EVE, regardless of the module in which it is found, is listed here.
Can Delete ...	<p>Choose the type of data that the user can delete. Each data element in EVE, regardless of the module in which it is found, is listed here.</p> <p>Note: when data is deleted it is deleted permanently. You may want to deny this privilege from all but a select few users. Records in the Data section of EVE can be made Unavailable which means they will not be accessible elsewhere in EVE but are still on the database - for example, if you no longer sell a particular brand of wet suit, you can make the stock item Unavailable so it no longer appears when you search for items to add to a new invoice. You</p>

	<p>may want to allow users to make items Unavailable but not to allow them to Delete records.</p> <p>EVE has strong “referential integrity”. This means that different types of data have relationships between them. For instance there is a relationship between Stock Types and Stock Items. If you try to delete a Stock Type that is referenced by one or more Stock Items, EVE will disallow it. You will need to update the Stock Item(s) first to use another Stock Type before you can delete the Stock Type.</p>
Can Mark As Void ...	Choose the type of data that the user can mark as Void. Only those data elements that have a void option are listed here.
Can Use Store View...	This is only appropriate if you use EVE in a multi-store environment. At the bottom right of each Search form in EVE is a link called Store View. By default this is set to Compound Store which means you can see all entries on the database regardless of which store you’re in and which store the data was created in. If you have the ‘Can Use Store View’ privilege for the Data Type that matches the Search form you’re using, you can click the Store View link and change to view information at a different store - e.g. you could perform a search for customers that were registered at the North Store.

21.1.2 Sales Privileges

Can Save Transactions With No Customer	This privilege allows the user to save invoices without recording the customer details
Can Save Transactions With No Employee	This privilege allows the user to save transactions without specifying the employee responsible
Can Create Refunds	This privilege allows the user to click on the Refund button at the bottom of the invoice form to create a new Refund - i.e. Return.
Can Sell On-Account to Credit-Risk Customers	This privilege allows the user to sell items using the On Account payment method to customers that have been marked as a credit risk - i.e. they have a tick in the Credit Risk box on the Details page of their Customer record.
Can Create Accounts for Credit-Risk Customers	This privilege allows the user to create new Accounts for customers that have been marked as a credit risk.
Can Change The Customer On An Existing Invoice	If an invoice was mistakenly saved with no customer or the wrong customer, you can assign a customer to it at a later date. This privilege allows the user to perform the action.
Can Manually Override Invoice Prices	EVE calculates prices based on the quantity of items being bought, retail price, tax band and Discount Band. This privilege allows the user to override the calculated value. You may want to deny this privilege to most users and instead give them the ‘Can Use Manual Discount Prices’ privilege, which lets them choose a pre-defined Discount Band.
Can Set Line Item Creation Date	The privilege allows the user to change the creation date of individual stock item lines in the shopping basket on an invoice.

Can Accept Gift Certificates, Gift Cards, Vouchers From Non-Owner	By default, when a customer wishes to use a gift certificate or voucher as the payment method, EVE provides a list of valid certificates/vouchers owned by the customer. This privilege allows the user to show all valid certificates/vouchers, even those owned by other customers. This may be useful, for example, if the spouse of the gift certificates owner wants to use the certificate.
Can Use Payment Methods Where Authorization Required	Some payment methods require the user to be authorized to use them (See Section 4.4.26.Payment Methods). This privilege provides that authorization.
Can Use Low Discount Bands / Can Use Medium Discount Bands / Can Use High Discount Bands	These privileges allow the user to override the default Discount Band used on invoices. You can group discount bands into 3 levels (see section 5.1.2 Discount Bands) and then indicate which users can use discount bands in each level. E.g. you could assign the 10% Off and 20% Off discount bands into the 'High Discount Bands' level and only give the store manager the 'Can Use High discount bands' privilege.
Can See Invoice Total on Search form	If this privilege is held by the logged-in user, the Invoice Total will be displayed at the bottom of the Invoice Search form whenever an invoice search is performed.
Can Change Account Owner on Account with Activity	This privilege is required for the user to be able to change the owner on an account that has a history to it - i.e. invoices were put on the account and/or account payments were made.
Can Close Accounts	You may choose to close accounts when they reach a zero balance or alternatively if you will not collect the balance on an account. Only users with this privilege can close accounts.
Can Add Account Payments	This privilege allows the user to accept account payments from customers.
Can Open Cash Drawer	This privilege allows the user to manually open the cash drawer if one is attached to the computer by pressing F4 or by clicking File then Open Cash Drawer .
Can Export Data	This option is required to export sales information.
Can Use Invoice Profit Menus	If you click the Options button at the bottom left of the Invoice form, you'll see 2 options on the popup menu called 'Show Invoice Profit' and 'Show Line Item Profit'. Those options calculate the difference between the price the item(s) are being sold at and the cost price of the item(s). The menu options are only available if the user has the 'Can Use Invoice Profit Menus' privilege.

21.1.3 Customer Privileges

Can View Personal Privileges	Allows the user to view his/her own privileges
Can Change Personal UserID And Password	Allows the user to change his/her own password

Can Change All UserIDs And Passwords	Allows the user to change the password of any user
Can Change All Privileges	Allows the user to view the privileges of any user
Can View All Privileges	Allows the user to see the privileges of any user.
Can Export Data	This privilege allows the user to export data from this module.

21.1.4 Purchase Order Privileges

Can Modify Completed Purchase Orders	Once all items on a Purchase Order have been received you can mark it as complete. This privilege allows the user to modify Purchase Orders even after they are complete. This is probably not a privilege you will want to grant to all users.
Can Edit Purchase Order Deliveries	When supplies are received from the vendor you can check them in. This updates stock levels and helps you track what is outstanding. This privilege allows the user to use the check in functionality.
Can Edit Purchase Order Invoices	When invoices are received from the vendor you can record them against a Purchase Order. This privilege allows the user to use the invoice functionality.
Can Export Data	This privilege allows the user to export data from the Purchases Module

21.1.5 Calendar Privileges

Can View Calendar	This privilege allows the user to see the Calendar.
Can Unlock Calendar	You can reschedule appointments on the Calendar by dragging them from day to day with your mouse. Before doing this you must unlock the Calendar by clicking the padlock at the bottom left until the padlock opens. This privilege grants the ability to unlock the calendar.
Can Change Settings	This privilege allows the user to change calendar settings which control the information displayed on the calendar and the way in which it is displayed.
Can Export Data	This privilege allows the user to export data from the Calendar.
Can Use Stores Link in Default Store Mode	This privilege is only applicable if you use EVE in multi-store mode. At the bottom of the Calendar is a Store View link. The user can click on that link to change which information is shown in the Calendar based on which store it applies to, provided they have the 'Can Use Stores Link in Default Store mode' privilege.

21.1.6 Courses Privileges

Can Add Students To Courses	This privilege enables the user to add customers directly to a course from the Courses Module. You may want to deny this privilege to users if you want to force employees to sell the course to the customer in the Sales Module (recommended). Allowing users to add customers to courses in the Customers Module prevents EVE from keeping track of the amount each customer has
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	paid for the course.
Can Exceed Max Number Of Students On a Course	This privilege allows the user to override the parameter that restricts the number of customers allowed on a course. A warning will be shown that the maximum number will be exceeded but the action will still be allowed provided this privilege is held.
Can Change Instructor Costs	This privilege allows the user to change the amount that instructors will charge the store for teaching a course module.
Can Modify Certification PIC Status	The notification status of a certification indicates whether details of the certification have been sent to PADI, and by what method (for example, post, internet, etc.). EVE maintains the value and you should not usually need to change it. However, this privilege indicates whether the user is authorized to change it.
Can Use On-Line PIC	This privilege indicates whether the user is authorized to upload certification details over the internet to PADI using EVE's interface to On-Line PICs.
Can Modify Completed Courses	This privilege allows the user to modify details of a course even after it has been marked as complete
Can Change Student Amounts	Allows the user to manually update the amount paid by the customer for the course. Note: this is not to be advised as the original invoice, if there is one, is not updated.
Can Move Students Between Courses	If a customer is registered on the wrong course you can move them to the correct course by adding and removing them from the courses table or by using the Event Planner. This privilege is required to be able to do it.
Can Remove Students From Courses	This privilege gives the user access to the Remove button in the Courses Module. The button removes a customer from a course. This is not recommended. A better solution is to refund the original invoice - EVE will prompt you to see if you want to remove the customer if the refund results in the customer having paid you no money towards the course.
Can Export Data	This privilege allows the user to export details of customers attending a course.

21.1.7 Trips Privileges

Can Add People To Trips	Allows the user to add customers directly to a trip in the Trips Module. You may want to deny this privilege to users, as you will typically sell the trip to customers in the Sales Module. Allowing users to add customers to trips in the Trips Module prevents EVE from automatically keeping track of the amount each customer has paid for the trip
Can Exceed Max Number Of People On Trips	Allows the user to override the amount the parameter that restricts the number of customers allowed on a trip. A warning will be shown that the maximum number will be exceeded but the action will still be allowed provided this privilege is held.
Can Move Customers Between Trips	If a customer is registered on a trip you can move them to another trip by adding and removing them from the trips table or by using the Event Planner. This privilege is required to be able to do it.

Can Remove People From Trips	Allows the user to remove customers from trips. This is not recommended. A better solution is to refund the original invoice - EVE will prompt you to see if you want to remove the customer if the refund results in the customer having paid you no money towards the trip.
Can Change Customer Amounts	Allows the user to manually update the amount paid by the customer for the trip. Note: this is not to be advised as the original invoice, if there is one, is not updated.
Can Modify Details Of Completed Trips	Allows the user to update details of a trip that has been marked as complete.
Can Export Data	Allows the user to export data from the Trips Module

21.1.8 Rentals Privileges

Can Modify Bookings After Being Added To Invoice	This privilege allows the user to make changes to bookings that have been saved and added to an invoice.
Can Check-Out Rental Items Before Booking Is Added To Invoice	You can reserve equipment items for a customer and then check them out to that customer when they pick them up. This will sometimes/usually happen at the same time - i.e. the customer will try on the equipment and then pay for the rental and take it away with them. When this happens, EVE prompts you whether you want to check out the items to the customer when the rental booking is added to an invoice. Occasionally you may want to check out the items before adding the booking to an invoice (by clicking on the Check Out button in the Rentals module) and this privilege gives the necessary authorization.
Can Export Data	This privilege allows the user to export data from the Rentals module

21.1.9 Services Privileges

Can Modify Bookings After Being Added To Invoice	This privilege allows the user to make changes to bookings that have been saved and added to an invoice.
Can Export Data	This privilege allows the user to export data from the Services module
Can Manually Override Service Part Prices	As described in section 12.1.2 Parts, you can assign parts to a Service Booking. The Price of those parts is automatically added to the Parts grid based on the price defined for the stock item being added. If the user has the 'Can Manually Override Service Part Prices' privilege, they can change the assigned price.
Can Assign Periodic Number	This is only applicable in certain regions. On the 'Cylinder Specific Information' tab of the Service Booking form is a text box called 'Periodic Certificate Number'. The user must assign a unique number to that box when performing a service on a cylinder by clicking on the button with an exclamation mark. The 'Can Assign Periodic Number' privilege must be held by the user clicking the button.

21.1.10 Data Privileges

Can Use Data and Data2 tabs on Store form	The Data and Data2 tabs on the Stores form let you indicate at which stores particular items are available. E.g. you may sell Surf Boards at stores 1 and 2 but not 3. This privilege must be held for you to be able to use these sections.
Can Export Data	This privilege allows users to export information from the Data module.
Can Use Update Multiple Rows Form	Allows the user to use the update multiple rows form. This allows him/her to update multiple rows of data in one go. This privilege should only be given to trusted employees.

21.1.11 Desktop Privileges

Can View All Staff Desktops	This privilege allows users to view all desktops, not just their own desktop.
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21.1.12 Inventory Privileges

Can Edit Retail Price	This privilege allows the user to update the value of the retail price of Stock items
Can Edit Cost Price	This privilege allows the user to update the value of the cost price of Stock Items
Can Edit No In Stock	<p>Allows the user to manually change the value for the # in stock of an existing stock item. Note: a user without this privilege can still create new Stock Items and assign the initial value for the no in stock as long as they have the can add/modify Stock Items privilege.</p> <p>In addition, a user can still receive deliveries on Purchase Orders (which will automatically update stock levels) without this privilege.</p>
Can Edit No On Order	This privilege allows the user to update the value of the # on order of Stock Items
Can Create Duplicate Store Stock # and Barcode #	EVE forces both the Store Stock # and the Barcode # to be unique i.e. no 2 stock items can have the same stock number and no 2 stock items can have the same barcode number. This privilege allows the user to create stock items with duplicate stock numbers and / or barcodes.
Can See Cost Price	This privilege allows the user to see the cost price information on the Stock Item form.
Can Export Data	Allows the user to export data from the Inventory Module
Can Update Stock Level History	Allows the user to make changes to the History on the Stock Levels tab of the Stock Item form

21.1.13 Report Privileges

Can Print Sales Reports	This privilege allows the user to print the identified reports
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Can Print Customer Reports	
Can Print Purchase Reports	
Can Print Course Reports	
Can Print Trip Reports	
Can Print Rental Reports	
Can Print Service Reports	
Can Print Inventory Reports	
Can Print Admin Reports	
Can Use Reports Module	This privilege allows the user to access the Report Module.
Report Groups: Can Create Configs	This privilege allows the user to define report configurations that can be saved and re-run at a later date. This allows you to define a set of interesting criteria (for example, equipment sales for a particular employee) and then re-run the same report for different time periods without having to set the same series of search criteria each time.
Report Groups: Can Delete Configs	This privilege allows the user to delete report configurations.
Can Create User Defined Reports	This privilege allows the user to define reports that can be saved and re-run at a later date and then re-run the same report for different time periods without having to set the same series of search criteria each time.
Report Groups: Can Print Closing Reports	This privilege allows the user to print the identified reports
Report Groups: Can Print Dated Report Groups	

21.1.14 Admin Privileges

Can Import Data	This privilege governs whether the user is authorized to import data into the program.
Can View Credit Card Numbers	For security reasons, only the last four digits of customer's credit card numbers are usually displayed in the program. This privilege allows an authorized user to view the entire number (by right clicking on the credit card

	number).
Can View Clock On Times	Allows the user to view the times that users were clocked on to EVE
Can Use Options Form 1/ All PCs 2/ All PCs at this Store 3/ This PC Only	Allows the user to change the options section in the admin module for 1/ All PCs on the database 2/ All PCs at the store that the active PC is in 3/ Just the active PC
Can Use EVE Folders Form	The EVE Folders Form, accessed from the Tools menu , allows you to identify where EVE can find key documents and applications. This privilege allows the user access to the folder.
Can Change Employee	This privilege allows the user to update and change employee information including system privileges.
Can Change Print Layouts	You may want to change the look and feel of certain EVE reports (for example, to add your own logo). This privilege gives you access to the print layouts.
Can Use Raw Data Form	EVE is written using SQL. This privilege gives the user access to the back end tables and SQL commands. It should only be given to an administrator with appropriate system experience.
Can Use QuickBooks Setup Wizard	This privilege gives the user access to the financial side of EVE and in particular allows them to set up and link to QuickBooks accounts.
Can Export To QuickBooks	This privilege gives the user the ability to export data to QuickBooks.
Can Log On Anywhere Regardless Of Store	EVE allows users to access the system via the internet or over a network. This privilege allows user to log on to EVE from any location.
Can Change Store View	This privilege allows the user to change the look and feel of EVE at the store level (see User Configurations for more data).
Can Use Customer Search Wizard	These privileges allow the user to access the search wizards and mine the database for information.
Can Use Sales Search Wizard	
Can Use Purchases Search Wizard	
Can Use Inventory Search Wizard	
Can Manually Log On at all times	Some locations may only want to allow login using a swipe card. This privilege lets users manually login as well by typing their username and password.

Can Change Store View	
Can Use Stores tab on Data Entry forms	Some data entry forms have a Stores tab which indicates at which store(s) the item being viewed is available. This privilege is required to be able to make changes to information on the Stores tab.
Can View EVE OnLine Sales from Popup	If EVE OnLine (i.e. the e-Commerce product) is being used in conjunction with EVE, a popup will be shown in EVE whenever an on-line sale is made. This privilege allows the user who is logged on in EVE to view details of the new sale.
Can Change User Interface	At the top right of EVE is a UI (User Interface) button. It can be used to change the look-and-feel of EVE. This privilege is required to change the UI.
Can Organize Links	When the UI is set to Advanced Data Entry, there is a Links button on the toolbar at the top of EVE. When clicked a popup menu is shown that lets you link quickly to your favorite programs and websites. You can add and remove links from the menu provided you have the 'Can Organize Links' privilege.
Can View Audit Log	If you click the View menu at the top of EVE and then Audit Log, you can view information about who made changes to data and when, provide you have the 'Can View Audit Log' privilege.
Can Upload Files using FTP	If you click the EVE icon at the top right of the program and then 'Upload File to EVE' you can upload a file to us - perhaps a database file or log file, etc. You can only do that if you have the 'Can Upload Files using FTP' privilege.
Can Merge Records	It is sometimes useful to be able to merge multiple records into one - e.g. a customer John Smith may have mistakenly been entered twice onto the database. You can merge records (by selecting more than one record in the results list on a Search form, right clicking on the selected area and then clicking Merge) provided you have the 'Can Merge Records' privilege.
Can Translate Form Text	You can translate or rename certain text on EVE forms by right clicking on them and then clicking Translate provided you have the 'Can Translate Form Text' privilege.
Can Change Field Properties	Some information is mandatory in EVE when you create records - e.g. on the Customer form you must enter a First and Last name before EVE will let you save the record. You might want to make other information mandatory - e.g. the Email field. To do that you can right click on the Email text and click the Mandatory option on the popup menu - provided you have the 'Can Change Field Properties' privilege.
Can Access Saved EVE Website Password when Renewing	
Can Change Store.	
Can Use Web Admin	

21.2 Backups

Database Backups can be made in one of two ways in EVE.

1/ Using the EVE Client. I.e. you can configure EVE to automatically take a database backup when EVE closes and you can manually take a backup whenever you want by clicking the EVE icon at the top right of EVE and then clicking Backup Now. See section 4.3.18 for more information

2/ Using the EVE Database Utilities application that is installed with the EVE Server feature (i.e. it resides on the same PC as your database). Using this application you can schedule backups to occur automatically at a fixed time every day. See section 21.4 for more information.

21.3 Data Integrity

21.3.1 Database Section

Two databases are installed with EVE. The live database is called eve and this is the one you will use on a day-to-day basis. The second database is called eveTraining and you will use this when experimenting with EVE and for staff training purposes. The 2 databases are completely independent so you can enter whatever data you want into the eveTraining database without affecting your live database.

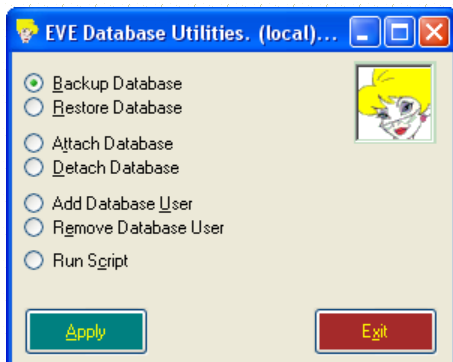
By default, the databases are saved by the setup process to: C:\Program Files\Integrated Scuba Systems\EVEDB

Each time EVE starts it prompts you so you can choose the database to use. You can turn this feature off so the same database is used each time using the *Show Database Selector* when setting options (See Section 4.3.1.EVE Options).

21.4 EVE Database Utilities

The EVE Database Utilities application is installed with the EVE Server feature (i.e. it resides on the same PC as your database). Using EVE Database Utilities you can perform database tasks such as backing up and restoring the database, running scripts, adding database users, etc.

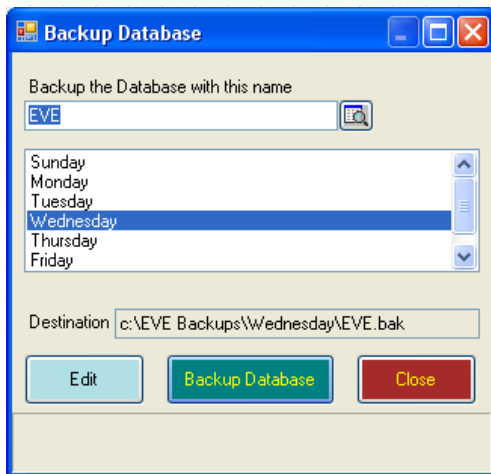
Start the program by clicking your Start button, then ISSYS then EVE Database Utilities. You will be presented with a Connection screen. Usually you can just click OK to Connect, but if you want to administer a database on a different server, you'll need to change the connection settings.



The form shown above will be displayed. Choose what action you want to perform and click Apply.

21.4.1 Backup

Enter the name of the database you want to backup or click the Browse button to choose the database from a list. You can choose to have backups created in different locations for different days of the week. For instance, the Monday backup could go to a removable flash drive, the Tuesday backup could go to the C: drive, the Wednesday backup could go to a different computer on the network, etc. You can choose the locations by clicking on a day of the week in the list and then clicking Edit. A standard Folder browser dialog box will be displayed so you can choose the new location. Please note: backups are always saved to a location relative to the computer where SQL Server is installed. So, if SQL Server is installed on PC#1 and you are running EVE Database Utilities on PC#2, and you specify c:\EVE Backups as the backup location, backups will be saved into the c:\EVE Backups folder on PC#1 NOT on PC#2.



The EVE Database Utilities program can be run from a command line with parameters to indicate what action to perform. One of the benefits of this is that you can create a Windows Scheduled Task to automatically create backups for you on a fixed schedule. In fact, by default, when you install the EVE server component, a Scheduled Task is created for you. This will create backups at 11:00 am every day and save them into the c:\EVE Backups folder on the server computer. You should ensure that this process is setup correctly by periodically examining the contents of the c:\EVE Backups folder to ensure the dates on the backup files are recent (i.e. less than a week old). FYI the command that is run by the Scheduled Task is as follows:

```
"C:\Program Files\Integrated Scuba Systems\EVEDB\EVEDBUtills.exe" backupdb (local)\EVE * * 1 eve
```

The parameters to EVEDBUtills.exe are as follows:

Parameter	Description
#1:	the command to run. One of: backupdb, startsqlserver, stopsqlserver, attachdb, detachdb
#2:	Data Source - usually this is (local)\EVE or .\EVE to indicate that the EVE instance of SQL Server installed on the local PC should be used.
#3:	Username with which to connect to SQL Server. This is only applicable if you choose to connect using SQL Server Authentication. Usually you will connect using Integrated Security (see parameter #5) so this parameter is not required and you can just specify an asterisk (*).

#4:	Password with which to connect to SQL Server. This is only applicable if you choose to connect using SQL Server Authentication. Usually you will connect using Integrated Security (see parameter #5) so this parameter is not required and you can just specify an asterix (*).
#5:	Use Integrated Security: use the value 1 if you want to connect using Integrated Security (i.e. using authentication based on the user that is currently logged onto Windows). Use the value 0 if you want to connect using SQL Server authentication - in this case you will need to enter a valid username and password in parameters #3 and #4.
#6	The name of the database to backup.

21.4.2 Restore

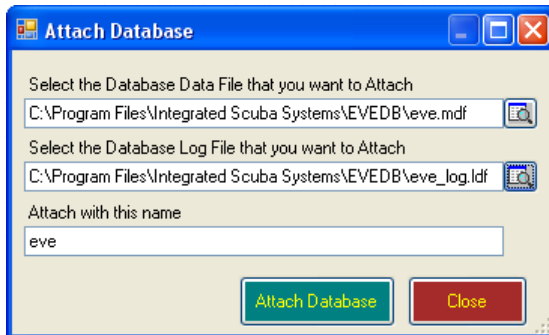
Should you ever want to Restore your database from backup, use the Restore option.

Select the Database Backup File that you want to Restore from	In the top box, type the name of the backup file you want to restore from or click on the browse button to the right and select the file.
Restore as database	Enter the name that you want to call the database when it is restored. If you enter the name of an existing database, that database will be OVERWRITTEN by the backup, so choose your name carefully.
Backup Position	Multiple backups can be saved into one backup file. Enter the position of the backup you want to restore from. The first backup written to the file has position 1, the second has position 2, etc. Note: when backups are created by EVE or by EVE Database Utilities only one backup is saved into the backup file, so you will always use the value 1 here. However, if you are restoring from a backup saved using another program you may need to specify a value other than

	1.
Data File Logical Filename	Enter a name that will be used internally by SQL Server to reference the database data file The default value for an eve database is EVE_dat and the default name for an eveTraining database is EVETraining_dat
Data File Physical Filename	<p>SQL Server databases have 2 main files: a Data file and a Log file. For instance, the eve database has 2 files called eve.mdf and eve.ldf or eve_log.ldf. Your data is stored in the mdf file and the ldf file holds information relating to database transactions that are in the process of being saved. Both files are equally important and your database will not work unless both are present.</p> <p>Enter the path of the main database file (i.e. the mdf file). This file will be created by the Restore process and is the file that contains the bulk of your data so please remember the location that you specify. At time of writing, the default path specified in EVE Database Utilities is c:\Program Files\Integrated Scuba Systems\EVEDB\eve.mdf. However, you are advised to create a folder called EVEDB in the root of your C: drive (i.e. c:\EVEDB) and use that instead. I.e. set the Physical Filename to c:\EVEDB\eve.mdf</p>
Log File Logical Filename	Enter a name that will be used internally by SQL Server to reference the database log file The default value for an eve database is EVE_log and the default name for an eveTraining database is EVETraining_log
Log File Physical Filename	Enter the path of the log file (i.e. the ldf file). This file will be created by the Restore process. At time of writing, the default path specified in EVE Database Utilities is c:\Program Files\Integrated Scuba Systems\EVEDB\eve.ldf. However, you are advised to use c:\EVEDB instead. I.e. set the Physical Filename to c:\EVEDB\eve.ldf

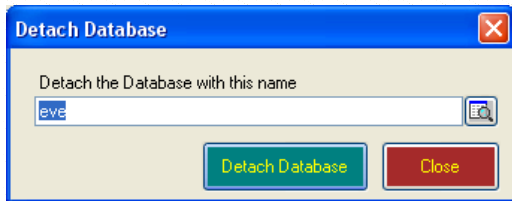
When you are ready, click Restore Database. EVE will ask you to confirm by typing the word 'yes' since there is a danger of overwriting an existing database with the backup file.

21.4.3 Attach Database



You will not usually want to use the Attach Database command. However, it is present to let you attach a database to SQL Server that was detached from this or a different instance of SQL Server. Enter the locations of the MDF and LDF files, supply a name for the database once it is attached and click Attach Database.

21.4.4 Detach Database

A dialog box titled "Detach Database" with a close button (X) in the top right corner. It contains a text field labeled "Detach the Database with this name" with the text "eve" entered. To the right of the text field is a magnifying glass icon. At the bottom are two buttons: "Detach Database" (green) and "Close" (red).

You will not usually want to use the Detach Database command. However, it is present to let you detach a database from SQL Server so you can perhaps attach it to another instance of SQL Server. Enter the name of the database you want to detach and click Detach Database.

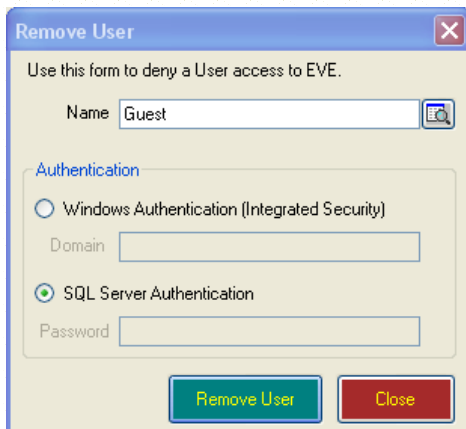
NOTE: the database will no longer be useable until you re-attach it so use this command with caution!

21.4.5 Add Database User

A dialog box titled "Add Windows/NT User" with a close button (X) in the top right corner. It contains a text field labeled "Name" with the text "Guest" entered. Below this is a section titled "Authentication" with two radio buttons: "Windows Authentication (Integrated Security)" (unselected) and "SQL Server Authentication" (selected). Below the radio buttons is a text field labeled "Domain" and another labeled "Password" with masked characters "xxxxxxxx". At the bottom are two buttons: "Add User" (green) and "Close" (red).

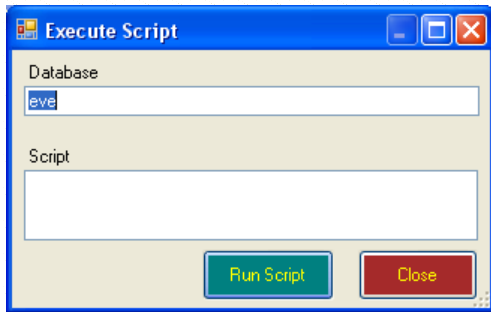
You will not usually need to use this command but it lets you create a new SQL Server user. Note: this is NOT the same as a user of EVE. You can create EVE users using the Employee form in the Data section in EVE.

21.4.6 Remove Database User

A dialog box titled "Remove User" with a close button (X) in the top right corner. It contains a text field labeled "Use this form to deny a User access to EVE." with the text "Guest" entered. Below this is a section titled "Authentication" with two radio buttons: "Windows Authentication (Integrated Security)" (unselected) and "SQL Server Authentication" (selected). Below the radio buttons is a text field labeled "Domain" and another labeled "Password". At the bottom are two buttons: "Remove User" (green) and "Close" (red).

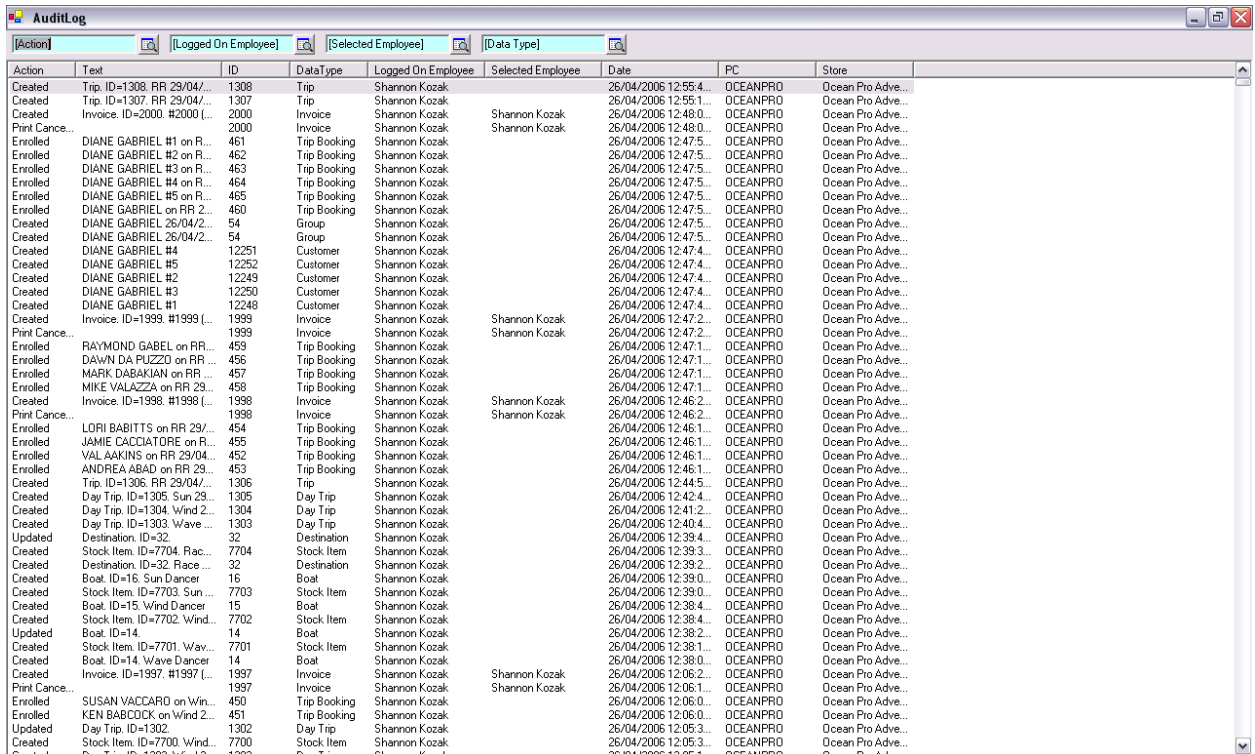
You will not usually need to use this command. It lets you remove a database user. Note: this is NOT the same as a user of EVE. You can delete EVE users using the Employee area in the Data section in EVE.

21.4.7 Run Script



Use this command to run a database script to update data and/or the database schema. Use with extreme caution as a badly composed script could irreparably damage your database. This command is only for use by experienced SQL Server programmers.

21.5 Audit Logs



Action	Text	ID	Data Type	Logged On Employee	Selected Employee	Date	PC	Store
Created	Trip, ID=1308, RR 29/04/...	1308	Trip	Shannon Kozak		26/04/2006 12:55:4...	OCEANPRO	Ocean Pro Adve...
Created	Trip, ID=1307, RR 29/04/...	1307	Trip	Shannon Kozak		26/04/2006 12:55:1...	OCEANPRO	Ocean Pro Adve...
Created	Invoice, ID=2000, #2000 (...)	2000	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:48:0...	OCEANPRO	Ocean Pro Adve...
Print Cancel...		2000	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:48:0...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL #1 on R...	461	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL #2 on R...	462	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL #3 on R...	463	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL #4 on R...	464	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL #5 on R...	465	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Enrolled	DIANE GABRIEL on RR 2...	460	Trip Booking	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL 26/04/2...	54	Group	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL 26/04/2...	54	Group	Shannon Kozak		26/04/2006 12:47:5...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL #4	12251	Customer	Shannon Kozak		26/04/2006 12:47:4...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL #5	12252	Customer	Shannon Kozak		26/04/2006 12:47:4...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL #2	12249	Customer	Shannon Kozak		26/04/2006 12:47:4...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL #3	12250	Customer	Shannon Kozak		26/04/2006 12:47:4...	OCEANPRO	Ocean Pro Adve...
Created	DIANE GABRIEL #1	12248	Customer	Shannon Kozak		26/04/2006 12:47:4...	OCEANPRO	Ocean Pro Adve...
Created	Invoice, ID=1999, #1999 (...)	1999	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:47:2...	OCEANPRO	Ocean Pro Adve...
Print Cancel...		1999	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:47:2...	OCEANPRO	Ocean Pro Adve...
Enrolled	RAYMOND GABEL on RR...	459	Trip Booking	Shannon Kozak		26/04/2006 12:47:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	DAWN DA PUZZO on RR...	456	Trip Booking	Shannon Kozak		26/04/2006 12:47:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	MARK DABAKIAN on RR...	457	Trip Booking	Shannon Kozak		26/04/2006 12:47:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	MIKE VALAZZA on RR 29...	458	Trip Booking	Shannon Kozak		26/04/2006 12:47:1...	OCEANPRO	Ocean Pro Adve...
Created	Invoice, ID=1998, #1998 (...)	1998	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:46:2...	OCEANPRO	Ocean Pro Adve...
Print Cancel...		1998	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:46:2...	OCEANPRO	Ocean Pro Adve...
Enrolled	LORI BABITTS on RR 29/...	454	Trip Booking	Shannon Kozak		26/04/2006 12:46:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	JAMIE CACCIATORE on R...	455	Trip Booking	Shannon Kozak		26/04/2006 12:46:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	VAL AAKINS on RR 29/04...	452	Trip Booking	Shannon Kozak		26/04/2006 12:46:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	ANDREA ABAD on RR 29...	453	Trip Booking	Shannon Kozak		26/04/2006 12:46:1...	OCEANPRO	Ocean Pro Adve...
Created	Trip, ID=1306, RR 29/04/...	1306	Trip	Shannon Kozak		26/04/2006 12:44:5...	OCEANPRO	Ocean Pro Adve...
Created	Day Trip, ID=1305, Sun 29...	1305	Day Trip	Shannon Kozak		26/04/2006 12:42:4...	OCEANPRO	Ocean Pro Adve...
Created	Day Trip, ID=1304, Wind 2...	1304	Day Trip	Shannon Kozak		26/04/2006 12:41:2...	OCEANPRO	Ocean Pro Adve...
Created	Day Trip, ID=1303, Wave ...	1303	Day Trip	Shannon Kozak		26/04/2006 12:40:4...	OCEANPRO	Ocean Pro Adve...
Updated	Destination, ID=32	32	Destination	Shannon Kozak		26/04/2006 12:39:4...	OCEANPRO	Ocean Pro Adve...
Created	Stock Item, ID=7704, Rac...	7704	Stock Item	Shannon Kozak		26/04/2006 12:39:3...	OCEANPRO	Ocean Pro Adve...
Created	Destination, ID=32, Race ...	32	Destination	Shannon Kozak		26/04/2006 12:39:2...	OCEANPRO	Ocean Pro Adve...
Created	Boat, ID=16, Sun Dancer	16	Boat	Shannon Kozak		26/04/2006 12:39:0...	OCEANPRO	Ocean Pro Adve...
Created	Stock Item, ID=7703, Sun ...	7703	Stock Item	Shannon Kozak		26/04/2006 12:39:0...	OCEANPRO	Ocean Pro Adve...
Created	Boat, ID=15, Wind Dancer	15	Boat	Shannon Kozak		26/04/2006 12:38:4...	OCEANPRO	Ocean Pro Adve...
Created	Stock Item, ID=7702, Wind...	7702	Stock Item	Shannon Kozak		26/04/2006 12:38:4...	OCEANPRO	Ocean Pro Adve...
Updated	Boat, ID=14	14	Boat	Shannon Kozak		26/04/2006 12:38:2...	OCEANPRO	Ocean Pro Adve...
Created	Stock Item, ID=7701, Wav...	7701	Stock Item	Shannon Kozak		26/04/2006 12:38:1...	OCEANPRO	Ocean Pro Adve...
Created	Boat, ID=14, Wave Dancer	14	Boat	Shannon Kozak		26/04/2006 12:38:0...	OCEANPRO	Ocean Pro Adve...
Created	Invoice, ID=1997, #1997 (...)	1997	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:06:2...	OCEANPRO	Ocean Pro Adve...
Print Cancel...		1997	Invoice	Shannon Kozak	Shannon Kozak	26/04/2006 12:06:1...	OCEANPRO	Ocean Pro Adve...
Enrolled	SUSAN VACCARD on Win...	450	Trip Booking	Shannon Kozak		26/04/2006 12:06:0...	OCEANPRO	Ocean Pro Adve...
Enrolled	KEN BABCOCK on Wind 2...	451	Trip Booking	Shannon Kozak		26/04/2006 12:06:0...	OCEANPRO	Ocean Pro Adve...
Updated	Day Trip, ID=1302	1302	Day Trip	Shannon Kozak		26/04/2006 12:05:3...	OCEANPRO	Ocean Pro Adve...
Created	Stock Item, ID=7700, Wind...	7700	Stock Item	Shannon Kozak		26/04/2006 12:05:3...	OCEANPRO	Ocean Pro Adve...

EVE maintains an Audit Log. When you make changes to the data in EVE, an audit record is saved. You can view the audit log to see when data changed and who changed it. For instance, if you find an Invoice has been deleted, you can see when it was deleted and which Employee was logged on at the time. Open the Audit Log form by clicking **View** then **Audit Log**. At the top of the form are various popup lists that you can use to filter the information that is shown.

22 POINT OF SALE HARDWARE

EVE supports a variety of point of sale hardware configurations. The following section describes supported hardware.

22.1 Barcode Scanners

EVE supports barcode scanners that emulate keystrokes i.e. they must either:

a/ plug into the keyboard port of your computer along with the keyboard and mimic keystrokes when you scan a barcode. The barcode scanner will come with a Y cable so both it and the keyboard can use the same port, or

b/ plug into a USB port and mimic keystrokes when you scan a barcode.

It is recommended that one be used that allows a 'prefix' to be programmed into it. Then, when a barcode is scanned, the prefix character is appended to the output from the scanner before it is sent to EVE. In this way an F9 prefix can be used so EVE automatically sets focus to the barcode field when a barcode is scanned. This avoids the necessity of manually clicking into the Barcode field each time before the code is scanned.

Metrologic Voyager scanners - principally the [MS9520/40 VoyagerCG](#) - are used by many centers. A wireless scanner that some stores use is the [MS1633 FocusBT 2D Imager Bluetooth](#). You can see more on these at <http://www.honeywellaidc.com>

22.2 Wireless Barcode Scanners

EVE supports barcode devices that allow multiple barcodes to be scanned, saved onto the device and then uploaded into EVE. This can be useful when doing inventory counts or checking in rental gear, etc. Devices are supported that create a CSV (Comma Separated Values) output file containing the barcode information on the computer when the data is uploaded. Contact EVE Diving for a list of recommended manufacturers.

22.3 Cash Drawers

EVE supports several types of cash drawer:

- 1) Those that have a Serial interface,
- 2) Those that have an OPOS (OLE for Point Of Sale) driver.
- 3) Those that are designed to be used with an accompanying receipt printer and will open automatically when a receipt is printed.
- 4) Those that connect to a receipt printer and open when a command is sent from EVE to the printer.

22.4 Customer Pole Displays

Customer Pole Displays must have a Serial interface or have an OPOS driver.

22.5 Receipt Printers

Receipt printers can have a Serial, Parallel or USB interface provided it has a Windows printer driver. More options for the receipt layout will be available if a Parallel or USB interface is used.

Note: a receipt printer is not a requirement. Some people prefer to use a regular desktop printer and print receipts on Letter or A4 sized paper.

22.6 Label Printer

EVE supports barcode label printers that use EPL - Eltron programming language. We usually recommend the Zebra TLP2844 or Zebra LP2844. These are described at www.zebra.com

NOTE: Zebra also sell printers with a 'Z' suffix - i.e. Zebra TLP2844Z and Zebra LP2844Z. Do not purchase these as they are not supported in the same way by EVE.

Other label printers are supported provided they have a Windows printer driver - however a barcode font will be required if barcodes are to be printed (this is not required with the Zebra printers described above). A demo barcode font is included with EVE that may be sufficient for some users.

22.7 Magnetic Stripe Reader

Magnetic Stripe Readers must be Keyboard Wedge or have an OPOS driver (recommended).

23 APPENDIX

23.1 Features of Microsoft Windows Useful in EVE

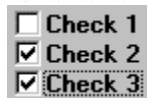
This section covers standard keyboard and mouse techniques used within EVE.

For the sake of brevity clicking on the left mouse button will henceforth be referred to as clicking while clicking with the right mouse button will be termed right clicking. Two very quick, successive clicks with the left mouse button will be termed double clicking.

23.1.1 Controls used in EVE

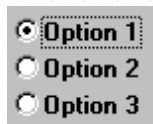
A control is any object appearing on the form with which you can interact using the mouse or keyboard. Descriptions of some of the controls used in EVE are given here. Experienced users of Windows may wish to skip this section.

Check Box



A checkbox displays a tick when selected; the tick disappears when the checkbox is cleared. This control indicates a true/false or yes/no option. Put a check in a checkbox by either clicking on it or by setting focus to it and pressing the space bar.

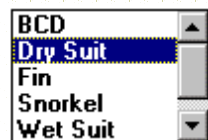
Option Button



Option buttons are used when one choice only must be made from a small number of options. Once any of the option buttons has the focus you can change which option is selected using the up and down arrow keys on the keyboard. Alternatively, click on the required option.

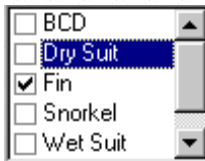
Checkboxes and option buttons function similarly but with one important difference: any number of checkboxes in a group can be selected at the same time while only one option button in a group can be selected.

List Box



A list box holds a list of items, usually sorted alphabetically. Click on an item to select it. Alternatively, once the list has focus, use the up and down arrow keys to change the selection, or press the key corresponding to the first character of an item. If there are multiple entries with the same first letter then each will be selected in turn as the letter is pressed. Some list boxes allow only one item to be selected at a time, others allow multiple selections (achieved by holding down the CTRL or shift keys while clicking on multiple items).

List boxes will sometimes respond to a double click - the response depends on the particular list box. Frequently, double-clicking will move an entry from one list to another.

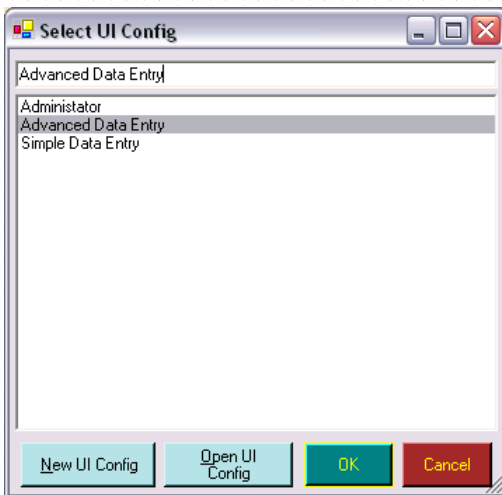


Some list boxes have a checkbox next to each item. Click on the checkboxes to check them. With this type of list box the selection (i.e. the highlighting, as for Dry Suit shown) is irrelevant - it is the Checkmark that indicates whether the item is selected or not.

Text Box

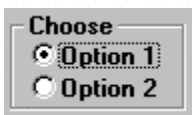
A text box is a rectangular area into which text can be typed. A blinking cursor indicates the insertion point. Use the left and right arrow keys to move the insertion point within the text. If some or all of the text is highlighted (i.e. selected) then further typing will overwrite the selected text.

Pop Up List Box



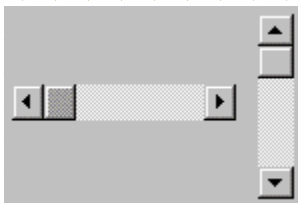
A pop up list box is a box that pops onto the screen when you have a choice among several alternatives, one of which must be chosen.

Frame



Frames are boxes used to group together other controls. In the diagram the frame has a caption Choose and is being used to group together two option buttons.

Scroll Bar



Often, there is too much information to display in a list or grid at one time. Scroll bars can be used to navigate through the list, showing only a portion of the data at one time. Scroll bars may be aligned horizontally or vertically depending on the direction that you will move through the data. Click on one of the arrows to scroll the data by one notch. Click on the bar to scroll the data by several notches. Drag the marker (by clicking and holding down the left mouse button when the mouse pointer is over the marker and then moving the mouse) to position the data at a point in proportion to the distance dragged.

Tab Control



A tab control behaves like an address book - click on the tab that sticks out at the top to be taken to that page. In the diagram, tab one has been clicked to reveal an option button, a label and a text box. Tabs 2 and 3 may contain a different set of controls.

Menu



Click on one of the items (or hold down the ALT key and press [on the keyboard] the letter that is underlined) to show a menu containing further options. In the example shown, the **File** menu has been clicked.

Most controls in EVE can be right clicked upon to show a popup menu. Much of the power in EVE is obtained using these popup menus.

Grid

There are 2 types of grids used in EVE,

- ❖ Those that are editable like the Shopping Basket on the Invoice form and
- ❖ Those that are not editable like the results grid on Search forms.

	Qty	Stock #	Unit Price	Price	Tax	Total	Stock Item
	1	OR-BS111	\$13.31	\$13.31	\$0.67	\$13.98	10x New Type O Ring
▶	1	64072200	\$242.00	\$242.00	\$12.10	\$254.10	5mm Stek Steamer S

Editable Grid

Click on a cell on an editable grid and the cell will act like a Textbox - see above. You can type into the text box to enter data straight into the grid. Some columns are read-only (e.g. the Tax column in the Shopping Basket). If you click on a cell in that column, the background of the cell will appear gray and your typing will be ignored.

To select a row in an editable grid, click on the gray column at the far left. You can select multiple rows by selecting one row first and then by holding down the Ctrl or Shift keys while you click on the grey column of another row.

Stock Item	Stock #	Stock Type	Manufacturer
Ladies Lontra 7mm Full Med	LD475503	Wet Suits	Cressi Sub
Ladies Lontra 7mm Full Med/larg	LD475504	Wet Suits	Cressi Sub
Ladies Lontra 7mm Full Med/small	LD475502	Wet Suits	Cressi Sub
Ladies Lontra 7mm Full Small	LD475501	Wet Suits	Cressi Sub
Ladies Lontra 7mm Jac Larq	LD475605	Wet Suits	Cressi Sub

Not Editable Grid

Highlight a single row in a non-editable grid by clicking anywhere on it - the row turns dark blue. You can highlight more than one row. First, highlight a single row. Then hold down the control key (usually labeled Ctrl on the keyboard) and click on another row. Both rows will now be highlighted. If, instead, you hold down the shift key (usually marked on the keyboard) while clicking, all rows in-between are also highlighted.

Most grids (editable or non-editable) allow a row to be deleted by highlighting the row (or rows) and pressing the Delete key on your keyboard.

Grids will sometimes respond to a double click- the response depends on the particular grid. The width of grid columns can be changed by moving the mouse pointer over a column separator in the grey title area at the top of a grid so the mouse pointer changes to a double-headed arrow. Press and hold down the left mouse button and move the mouse; the column separator moves as well. When the column is the desired width, release the mouse button.

Grids have a context menu - i.e. a set of options that pop-up when you right click on the grid. With non-editable grids you can right click anywhere on them to show the context menu. With editable grids, if you right click on a cell when it has focus you will get the standard Textbox context menu, which gives options relating to the text in the cell. If you right click on the grid's gray column at the far left, or right click on a row when it is selected, you will get the grid's context menu, which has different options on it depending on which grid is involved.

You can sort the data in a grid by clicking on a column header. Data will be sorted by data in that column. This does not affect data on the database - just the way the data is displayed.

23.1.2 Moving Between Controls

Set the focus to any control on the current form by clicking on it. Alternatively, move the focus to the next control by pressing the tab key () or to the previous control by holding down the shift key () while pressing the tab key.

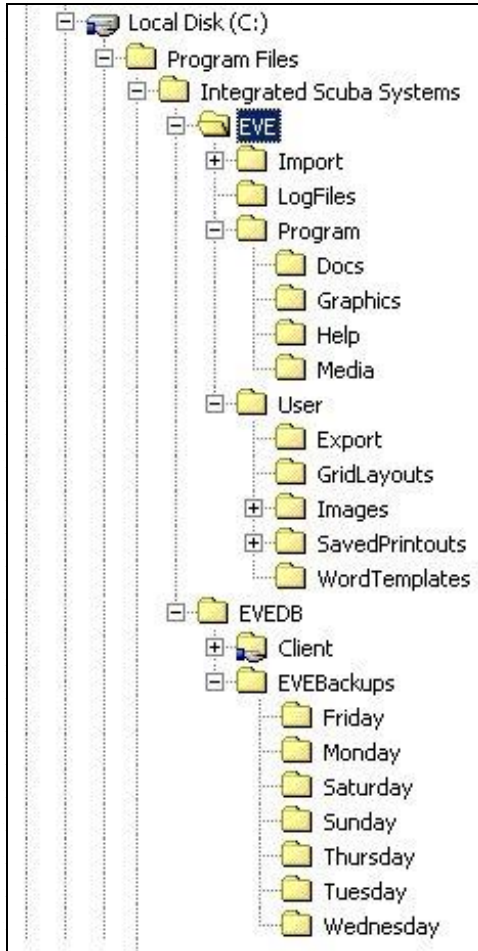
If a control has a description in which one letter is underlined, hold down the ALT key and press the appropriate key to activate that control.

This affects different controls in different ways:

- ❖ Text boxes, pop up list boxes, list boxes, grids and frames gain the focus,
- ❖ Check boxes become checked if they were unchecked, and vice-versa,
- ❖ Option buttons become selected,
- ❖ Menus and buttons perform the action associated with them (as if you clicked on them),
- ❖ Tab controls change to show the appropriate tab

23.2 EVE Folders

The installation program creates several folders on your hard-disk. By default these are created within the c:\Program Files\Integrated Scuba Systems folder. The folders are described here.



EVE is a 'Client/Server' application - i.e. there are 2 components: a Client (the front-end that a user sees) and a Server (the database and associated files). You can install both components on a single PC if you want to or you can install the Server component on one (and only one) PC, and the Client component on one or more other PCs.

The Client component is, by default, installed into c:\Program Files\Integrated Scuba Systems\EVE and the Server component is, by default installed into c:\Program Files\Integrated Scuba Systems\EVEADB.

There are three main branches to the EVE folder structure: Import, Program and User. The Import branch is where Excel and PADI import files should be copied prior to importing the data. The User branch holds all files that are created or modified by EVE. You can back up this folder and all its sub-folders. The Program branch holds all system files that the program needs to run - these will not usually change. You can get these back off the EVE CD so there is usually not much point in backing them up on a regular basis.

Docs

In EVE you can link documents (e.g. Word for Windows or PDF files, etc) to records so the documents can be shown and/or printed when those records are being processed - e.g. you

could link a Waiver document to Trips so a copy can be printed for the customer to sign when trips are sold. All documents should be stored in the Docs folder.

Graphics

This folder holds all program image files. This includes toolbar images, start-up 'splash' screen graphics, etc. NOTE: it does not hold student image files as those must be backed up to prevent loss and are therefore located in the User branch.

Help

Holds this manual and associated files.

Media

This folder holds Sound files that are played at various points in EVE - e.g. the kerching sound when an invoice is saved.

Export

All export files created using the Export utility are saved to the Export folder by default.

GridLayouts

All grids in EVE use Grx files to provide default grid layout information, e.g. column captions, format of data to appear in each column, etc. Each grid has one corresponding Grx file.

Images

If you create student bitmap images (e.g. for use with On-Line PICs and club membership cards) you should save them to the Images folder. In addition, if you use stock item images those should be saved in a StockItems sub-folder of Images

SavedPrintouts

You can choose to save JPEG images of various print-outs in EVE. For instance, you could configure EVE so an image of each invoice saved is stored. Those images will be saved to the PrintLayouts folder. Subfolders will be created by EVE for each data type, e.g. Invoices, PurchaseOrders, etc.

WordTemplates

Some report types (e.g. Invoices, Purchase Orders, etc) can be printed using Word for Windows. A template DOC file is used for each data type and these are stored in the WordTemplates folder.

23.3 Troubleshooting

The following section describes procedures for correcting problems that may arise in EVE.

23.3.1 Setup Program Will Not Run

The Setup program uses Microsoft Windows Installer. If you are running on Windows NT4 then service pack 3 or above is required. You can download NT service packs from <http://www.microsoft.com/networkstation/downloads/default.asp>

23.3.2 Date/Time Problems

If you experience problems with dates and/or times (e.g. the day and month appear the wrong way around, or errors are reported by EVE when you input dates and/or times, etc.), check the formats of dates and times in your computer's Windows Control Panel. Double click on Regional Settings and check that your dates and times have valid formats. You may need to remove the AM/PM settings under the Time definition.

23.3.3 Currency Problems

If currency values are shown with the wrong currency symbol (e.g. you are located in the United Kingdom and a Dollar symbol is shown rather than the Pound Sterling symbol) check the date format in your Windows Control Panel in the Regional Settings section.

23.3.4 Synchronizing Dates/Times

If you are running EVE on a network, you need to ensure that the Dates and Times of each workstation PC is the same otherwise it will be confusing if you get invoices created at the same time on different PCs that show a different date. On each PC start the Windows Control and double click on Date/Time. Change the date and/or time if necessary and click OK.

Alternatively, use the *Synchronize Date and Time with Server* option when setting EVE options (See Section 4.3.1.EVE Options). If this option is checked, EVE will set the date and time to be the same as that on the database server when EVE starts. This guarantees all PCs will have the same date/time and is recommended.

23.3.5 Forms Appear Misaligned with Controls not Visible

EVE requires the DPI setting of your display to be set to Normal Size (96 DPI). Any other setting will result in forms being misaligned and will not function properly. You can set this value as follows: right click on your Windows Desktop and click **Properties**. Click **Settings** and then **Advanced**. The DPI Setting is shown in the Display section.

23.3.6 Images and Graphics Do Not Display Correctly

EVE displays several graphics and images using many colors. If these appear 'washed-out' or overly grainy, try increasing the number of colors that your monitor displays by doing the following:

- ❖ Start the Windows Control Panel by clicking the **Start button** and then clicking **Settings** and **Control Panel**.
- ❖ Double click on the **Display** icon and choose the **Settings** tab.
- ❖ In the Colors section choose the last item in the combo box.
- ❖ Click **OK**.

23.3.7 Stock Items are displayed in Data Module but not in Sales or Purchases Modules

Stock items are shown in the Data module whether they are Unavailable or not. However, Unavailable Stock items are not shown in the Sales or Purchases modules.

In addition a Stock item must have the Can be Added to Purchase Orders box (See Section 5.1.5.Stock Items) checked to appear in the Purchases module.

23.3.8 Error on Startup

If you receive the following error when EVE starts: *“An error occurred creating the form. See Exception.InnerException for details. The error is: Root element is missing.”* then the configuration information has been lost from the following file: c:\Program Files\Integrated Scuba Systems\EVE\EVEMain.cfg

You can either replace this file with a copy from the following location:

C:\Program Files\Eve 5.X.X Setup Files\program files\Integrated Scuba Systems\EVEDB\Client\program files\Integrated Scuba Systems\EVE

Where 5.X.X depends on the version of EVE you are using, e.g. it may be 5.0.1 or 5.2, etc.

This will reset your Connection details to their default values so when you see the initial Connection screen next time you start up EVE, you will need to click Edit Settings to tell EVE the location of your database (unless the database is on the PC you are using).