

EVE 5.7 Enhancements

New PIC Online

Features of the new PIC Online process:

- As well as standard and EFR PICs you can now upload DSDs as well.
- No particular browser is required; when you click 'Send to PICs OnLine' the certification is uploaded directly with no Next, Next, Next requirement through the web pages as before.
- The Student number is returned immediately upon successful processing and the Certification record in EVE is updated accordingly.
- You can choose to upload all certifications at once, or filter by Course Type or Instructor.
- Batch process: simply click Select All (or select those certifications you're interested in) then click Send to PICs OnLine.
- Missing / Invalid information is shown in the Status column. Open the Certification or Customer form directly from the Pending list to add or modify information.
- Multi-Stores: can choose to upload certifications just for the current store or, if authorized, for all stores at once.
- The Upload History tab lists previously uploaded certifications so you can see when and by whom certifications were uploaded. Filter by course type, instructor and/or date range. From here you can reprint temporary cards.

First Name	Last Name	Course Type	Status
Robert	Grant	Deep Diver	No Image.
Austen	Constantinou	Deep Diver	-Valid-
Samantha	Zimmerman	Discover Scuba Diving	-Valid-
Anabel	Veranci	Discover Scuba Diving	No Date of Birth. No Tel (Home). No Email.
Zinedine	Smith	Discover Scuba Diving	-Valid-
IAN	LACK	Discover Scuba Diving	-Valid-
Chris	Smith	Discover Scuba Diving	-Valid-
STEPHEN	Wood	Discover Scuba Diving	-Valid-
Anthony	Craig	Discover Scuba Diving	-Valid-
Arabelle	Allum	Drift Diver	No Certifying Instructor.
Kevin	Maggs	Dry Suit Diver	-Valid-
Harry	Adams	Dry Suit Diver	-Valid-
Hannah	Abrahams	Dry Suit Diver	Student Image File not found.
Chris	Wood	Emergency First Response	-Valid-
Erica	Orro	Emergency First Response	-Valid-
Pippa	Barfield	Emergency First Response	-Valid-
Anne	Smith	Enriched Air Diver	-Valid-
Andrew	Woollams	Openwater Diver	-Valid-
Belinda	Wetherell	Openwater Diver	-Valid-

Missing / Invalid PIC information is indicated by a red exclamation mark when you open the Customer or Certification form.

Customer: Mark Cooper

General

Name

First Name* Mark

Middle Initial

Last Name* Cooper

Known As

Customer ID 2804

Personal Details

Date of Birth 09 Sep 2010

Sex !

Marital Status !

Occupation

Company !

Contact Details

EMail Mark.Cooper2@gmail.com

Phone (H) (280) 207496

Phone (W)

Phone (M) (280) 384148

Fax

Pager

Skype Name

Home Address Local Work

Country !

Line 1 2804 Cooper Road

Line 2

City !

Region

Postcode !

Mailing Lists

Deep Diver

Student News

All News

Customer Type

Career Development Centre

Club Member

Current Member

Swipe

New Save Close

X-Charge

This section is only relevant if you use X-Charge in conjunction with EVE to process credit card transactions (North America only).

X-Charge has introduced the ability to process 'partial payments'. In the past, if a customer wanted to purchase goods worth \$100 but their bank only authorized \$90, the transaction would be declined. Now, EVE will display a prompt describing the situation so you can ask the customer if they want to continue to put \$90 on the card and pay the balance with an alternative payment method.

IMPORTANT: This change requires that you use the most up-to-date version of X-Charge. You can upgrade free of charge at www.x-charge.com

New User Interface

A new UI called 'Customer' has been added so busy stores can provide a computer on the sales floor for customers to enter their own contact information into EVE. It should be used with the new User provided called 'Customer' so the customer is not permitted to do anything in EVE other than add a new customer record.

In addition, the feature that lets an authorized user choose which fields are Mandatory on data entry forms has been enhanced so you can indicate that a particular field is mandatory in e.g. the Customer User Interface but not in other UIs. In this way you can ensure that customers using EVE have to enter all relevant PIC information but Employees using EVE do not need to capture all that information - e.g. it is not necessary for an Employee to capture full contact details for a customer purchasing a small item like sun-screen.

EVE: Customer Entry on ISSYSPRECISSION\EVE._ACMEDiving

File View

Customers New Find

EVE: Electronic Virtual Employee 5.7

Customer: (New #2)

General

Name

First Name*

Middle Initial

Last Name*

Known As

Personal Details

Date of Birth 05 Nov 2010

Sex*

Marital Status

Occupation

Company

Contact Details

EMail*

Phone (H)*

Phone (W)

Phone (M)

Fax

Pager

Skype Name

Home Address Local Work

Country* UNITED STATES

Line 1*

Line 2

City*

State*

Postcode*

Mailing Lists

Newsletter

Seal Team

New Save Close

User Interfaces can now be linked to Employees

If you choose, you can link individual Employees to their preferred UI. e.g. when a new temporary employee logs in, EVE could automatically change to a UI that only includes the New Invoice and New Customer buttons.

Auto-Email Agent Jobs

A new Auto-Email Agent job with a subject line of “Congratulations on Discovering Scuba” has been added so stores can automatically send a congratulations email to people that just completed a Discover Scuba Diving course. The email contains the Scuba Connect number and any other promotions the store chooses to run. A second Auto-Email Agent job with a subject line of “Welcome to the underwater world of Diving” can be used to send an email to Hot-Leads imported from Excel data supplied by PADI of DSD participants that live in your area.

The image illustrates the process of an auto-email agent. It starts with an Excel spreadsheet containing a list of participants with their names, certification levels, and email addresses. This data is imported into the EVE application. The application then triggers an auto-email agent, which sends out personalized emails. One example email is shown, congratulating a customer on completing a Discover Scuba Diving course and promoting further diving opportunities.

First Name	Last Name	Cert Level	Mailing Lists	Email
DELANEY	DISHER	Discover Scuba Diving	DSD Hot Leads	delaney.disher@gmail.com
WALKER	JEZEK	Discover Scuba Diving	DSD Hot Leads	walker.jezek@yahoo.com
WESTON	JEZEK	Discover Scuba Diving	DSD Hot Leads	westonj@cingcity.com
JAI	BARNDT	Discover Scuba Diving	DSD Hot Leads	winson_lvl@hotmail.com
ALEXANDRA	JASHINSKY	Discover Scuba Diving	DSD Hot Leads	a.jashinsky@gmail.com
HANNAH	STEFFAN	Discover Scuba Diving	DSD Hot Leads	hannahs@hotmail.com
JENNIFER	HARTMAN	Discover Scuba Diving	DSD Hot Leads	jenny_hartman@gmail.com
MARCE	LUCK	Discover Scuba Diving	DSD Hot Leads	marce.luck@yahoo.com

A third Auto-Email Agent job with a subject line of “Module Successfully Completed” has been added to send an email to students when they complete individual course modules. You can, of course, change those subject lines to whatever you want – just make sure a Draft email exists with exactly the same name in Outlook. In the past, jobs in the Auto-Email Agent were shown even when Unavailable – they were shown with a line through them to indicate they were Unavailable. Now they will be hidden. You can make them visible again using the link at the bottom right of the main form.

PDFs

In the past, when emailing e.g. Invoices or Purchase Orders, the email attachment was in the form of a JPEG. It is now possible to choose between JPEG and PDF.

Sales Reporting

New options have been added to the Invoice Type form to give you more control about what counts as a 'sale'. Choose 'Show as a Sale' if you want invoices created with the Invoice Type to be treated as a 'sale' when you run reports. Choose 'Show as a Non-Sale' if you want invoices created with the Invoice Type to appear on sales reports in the 'Non-Sale' section. Choose 'Do Not Show' if you don't want invoices created with the Invoice Type to appear on sales reports at all.

Invoice Type: Sales Receipt

ID: 1

Invoice Type*: Sales Receipt

Ticket # Prefix:

Sales Reporting

Show as a Sale

Show as a Non-Sale

Do Not Show

Export to QuickBooks?

You could, for example, mark Sales Receipts as 'Show as a Sale' (the default) and mark Lay Aways as Show as a Non-Sale. When final payment is taken on the Lay Away, you can convert it to a Sales Receipt so it is treated as a Sale at that point.

<i>Profit Center Breakdown Report</i>							Closing #	
							Printed 16/05/2011 10:34:52 AM	
Store	Abyss Scuba Diving							
Cost Center								
Profit Center								
Employee								
PC								
From Start Of	1/05/2011							
To End Of	16/05/2011							
Profit Center	Sales		Returns		Total	COGS	Non-Sales	
	Sub-Total	Tax Accrued	Sub-Total	Tax Accrued			Sub-Total	Tax
.Default	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Anglis	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Cammeras	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Classes	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Diving Equipment	\$103.64	\$10.36	\$0.00	\$0.00	\$114.00	\$52.00	\$109.05	\$10.90
Miscellaneous	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Pay Outs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Professional Training	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Rentals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Servicing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Materials	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Technical Diving	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel Overseas	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Wetsuits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals	\$103.64	\$10.36	\$0.00	\$0.00			\$109.05	\$10.90
						Total Net:	\$103.64	\$109.05
						Total Tax:	\$10.36	\$10.90
						Total Gross:	\$114.00	\$119.95
						Total COGS:	\$52.00	\$50.50

A second new option called 'Update Reporting Dates when Converted to Sales Receipt' has been added to the Invoice Type form. If checked, then when, in the example above, a LayAway is converted to a Sales Receipt, the date on the LayAway will be set to Today's date so the sale is registered as happening today rather than when the LayAway was first created.

The screenshot shows a software window titled "Invoice Type: Ongoing Invoice". It contains several input fields and checkboxes. The "ID" field contains the number "3". The "Invoice Type*" dropdown menu is set to "Ongoing Invoice". Below it is a "Ticket # Prefix" field. A "Sales Reporting" section contains three radio buttons: "Show as a Sale", "Show as a Non-Sale" (which is selected), and "Do Not Show". Below this are several checkboxes: "Export to QuickBooks?", "Update Stock Levels?" (checked), "Locked On Load?", "Invoice Must Balance?", "Show 'Converted to Sales Receipt' Prompt?" (checked), and "Update Reporting Dates when Converted to Sales Receipt" (checked and highlighted with a red box). At the bottom, there is an "Invoice Tabs" section with checkboxes for "Unpaid Invoices (Unsaved)", "Unpaid Invoices (Saved)", "Paid Invoices (Unsaved)", "Paid Invoices (Saved)", "Payments (Unsaved)" (checked), and "Payments (Saved)" (checked). The window has a standard Windows-style title bar and a toolbar at the bottom with icons for navigation and buttons for "New", "Save", and "Close".

A third option called 'Update Stock Levels' has been added to the Invoice Type form. With this, you can choose whether items are removed from inventory when invoices of that Invoice Type are saved. In the example above, you could leave the box unchecked on Lay Aways. Inventory levels will then not be updated until final payment is taken and the invoice is converted to a Sales Receipt.

Student Image Capture

EVE has had the ability for several years to communicate with suitable cameras so a student image can be captured and linked to the customer on the Customer form. However, the feature was only previously supported in XP. It is now supported in Vista and Windows 7 as well.

Gift Card Search

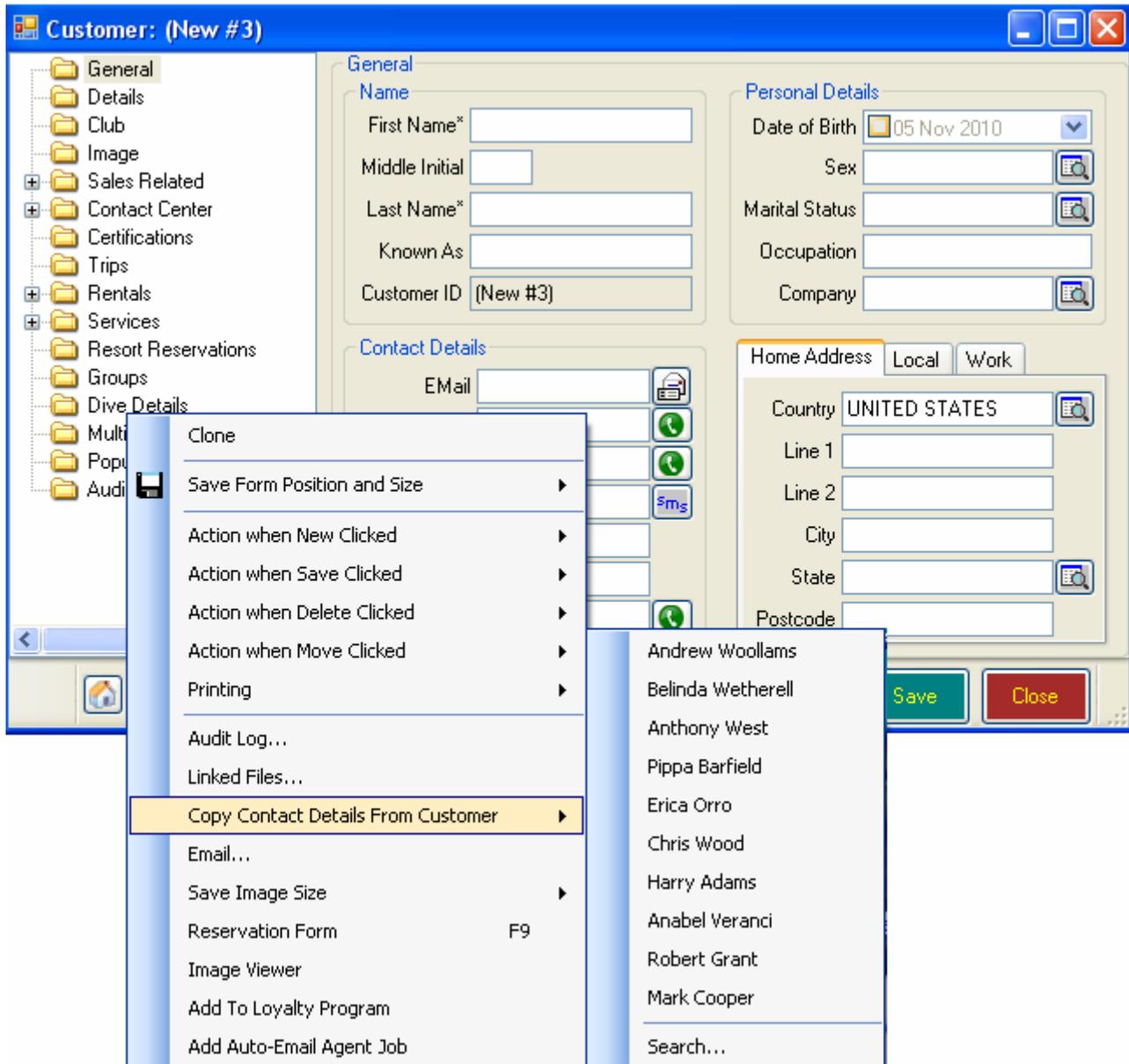
New search criteria have been added to the Gift Card Search form so you can search on cards with Credit >0, =0, etc.

Popup Notes

Two new options have been added in the 'Show Popup Notes when a Record is opened' section on the Popup Notes tab within the Customers tab on the Options form. Put a tick in the first one (Rental Booking) to make the Popup Note form appear when an existing Rental Booking is opened. Put a tick in the second one (Service Booking) to make the Popup Note form appear when an existing Service Booking is opened.

New 'Copy Contact Details' option

A new option has been added to the Customer form so you can quickly copy Address, Email, Phone details, etc. from another customer. You can either copy from one of the recently added customers that are listed, or do a Search to copy from another customer.



Store Sales

Previously, to set prices for e.g. the End of Season Sale the store provided a discount band on each stock item. This worked fine but was restrictive in what prices could be set for the sale. A new way to define sale prices has been added that lets the user define one or more 'Pricing Types' called e.g. "End of Season Sale" or "Holiday Season Sale". These appear in the price list on the Prices tab of the Stock Item along with the other pricing types (e.g. Student Price, Club Member Price, etc). Prices can then be defined in the same way as for any other pricing type in EVE - i.e. by applying a discount band to the stock type, by manually entering a price, by importing prices from Excel, or by using the Pricing Wizard. In addition, the Sale start and end date can be defined on the Options form.

Ongoing Invoices

Ongoing Invoices can now be Merged. So, if e.g. 2 Ongoing Invoices were created for husband and wife, you can merge them into one.

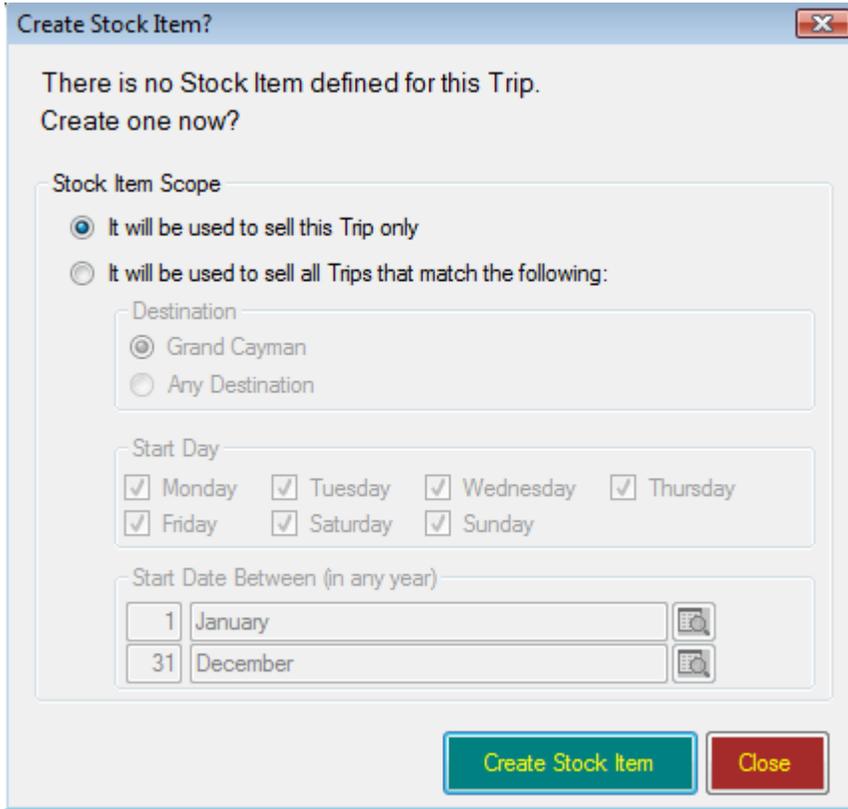
EVE Background

It has always been possible to add a background graphic to EVE. This has been extended so you can now use an HTML page as the background. This could include graphics or links to other sites, etc. You can create a simple HTML page and store it on the computer to use for the background or you could use e.g. your website as the background (assuming you have a fast and reliable Internet connection).

The screenshot shows the ACME Diving software interface. The title bar reads "Rog: Roger. Lockwood on ISSYSPRECISION\EVE._ACMEDiving". The menu bar includes "File", "Edit", "View", "Tools", "PADI", and "Help". The main window title is "ACME Diving". On the left, there is a vertical sidebar with the text "EVE: Electronic Virtual Employee 5.7 Beta1" and a tree view containing: "[Compound Store]", "Sales", "Customers", "Purchase Orders", "Courses", "Trips", "Rentals", "Services", "Inventory", and "Data". The main area contains buttons for "Courses" (New, Find) and "Certifications" (New, Find). A "Background" dialog box is open, showing options to "Choose Background": "Graphic", "HTML File / Web Site" (selected, with path "C:_Demo\Background\VideoBackground.html"), and "No Background". The background of the main window features a video player showing a clownfish, with a "PADI eLearning" banner at the bottom. The banner text reads: "PADI eLearning. Come dive in and start your adventure today with the PADI Open Water Diver course online." Below the banner, there are links: "Visit our website", "View our Course Schedule", and "Sales Counter Busy? Book a Course or Trip here".

New Stock Item prompt when a Course or Trip is created

When a course or trip is saved, EVE does a search for stock items that can be used to sell it. I.e. it looks at the 'Rules' defined on the Links tab of all stock items to see if the new course/trip matches those rules. If so, the stock item is linked to the new course/trip and can be used to sell it in future. If there are no stock items that can be linked in this way, EVE will now show a prompt so you can quickly create a Stock Item to sell the new course/trip. You can choose whether the stock item should be used to sell just this new course/trip or all similar courses/trips as well.



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

- Grand Cayman
- 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**

Employee Filter added to Attendance Record report

In the past, the Attendance Record report (accessed by clicking File then Reports then Admin) could only be run for all staff at the store. A new filter has been added so you can now run it for individual employees.

Staff Desktop: Sales section

Additional information has been added to the Sales section of the Staff Desktop. Your staff can use the report to see how much commission they have earned in the specified period. In addition, it is now possible to print the report.

Desktop: Roger. Lockwood

ROBBY DE KANTER
ROBERT GSCHWEND
Roger. Lockwood
Today's Tasks
Today's Contact Calls
Calendar
Sales
Today's
Yesterday's
This Week's
Last Week's
This Month's

Invoic...	Customer	Qty	Total Unit...	Price	Tax	Total	Total Cos...	Net Profit	Stock Item
60776	Simon Baxter	2	\$1,019.57	\$887.03	\$155.23	\$1,042.00	\$0.00	\$887.03	DC500 Digi camera elit...
60777	Flavia Bertolini	3	\$137.87	\$137.87	\$24.13	\$162.00	\$116.85	\$21.02	Gates white balance sl...
60778	Aaliyah .	1	\$100.00	\$100.00	\$17.50	\$117.50	\$12.17	\$87.83	5mm Delta Short Boot ...
60778	Aaliyah .	1	\$10.00	\$10.00	\$0.00	\$10.00	\$6.75	\$3.25	Explorer Boot Blk/Blue...
60778	Aaliyah .	1	\$17.87	\$17.87	\$3.13	\$21.00	\$11.89	\$5.98	1.5mm Tropic Glove
60779	Shelley Bayliss...	1	\$126.81	\$126.81	\$22.19	\$149.00	\$85.00	\$41.81	Alpha 8/SP5 with Blac...
60779	Shelley Bayliss...	1	\$0.00	\$0.00	\$0.00	\$0.00	\$8.10	(\$8.10)	Battery Kit (pack 1) - F...
60780	Anthony Craig	1	\$55.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Basdf. : Any Destinati...
60781	Roy Darling	1	\$55.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Basdf. : Any Destinati...
60782	Astron Dog Trai...	1	\$55.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Basdf. #Basdf. 2/12/2...
60783	Fran Brice	1	\$18.72	\$18.72	\$3.28	\$22.00	\$12.17	\$6.55	5mm Delta Short Boot ...

Unit Price: \$1,595.84. Price: \$1,298.30. Cost Price: \$252.93. Profit: \$1,045.37. Commission on Net Sales: \$6.15.
Commission on Profit: \$5.45.

N/A Close

Stock Item Changes

The Stock Item form has been slightly re-jigged. The 'Details' tab has been renamed to 'EVE OnLine' and there are sub tabs for Product Details, General, Links and Related Products. The Product Details tab now allows HTML or plain Text to be used.

The Related Products tab can be used to indicate which other items are displayed at the bottom of EVE OnLine when a product is viewed – e.g. you could show a Mask Defog item when details of Masks are viewed. The Links tab let you link together similar items into one – e.g. if you have 3 items in EVE to represent the different sizes of the same product (Small, Medium and Large), you can link them so the product only shows up once in EVE OnLine and the user can choose the size they want from a pick list.

Stock Item: 3mm Pacific Steamers Full

General Stores Suppliers Prices Stock Levels Serial Nos Packages Links Documents EVE OnLine Chart History

Product Details General Links Related Products

Information entered here will appear in the Product Details section in EVE OnLine Text HTML

Times New Roman 3 **B I U**



Description

Our profile family of steamers offers a perfect blend of style and function. Available in 3mm thickness, in men's and women's sizes.

- Back zipper steamer for good water sealing and great ergonomic look and fit.
- Smooth-cut collar neck line provides unprecedented comfort compared to traditional roll edged collars.
- Double blind stitched outer seams and single blind stitched inner seams for durability and comfort.
- Metal main zipper slider is sturdy yet easy to operate.
- Nylon webbing thumb loop at base of all back zippers for easy donning.
- Integrated tatex Kneepads offer abrasion resistance.

New Save Close

Rental Power Links

In previous versions of EVE, the Power Links at the bottom of the Rental section (*Today's Rental Bookings*, *Yesterday's Rental Bookings* and *Tomorrow's Rental Bookings*) were driven off the Creation Date of rentals. Now, they use the rental Due Start Date.

Contact Method

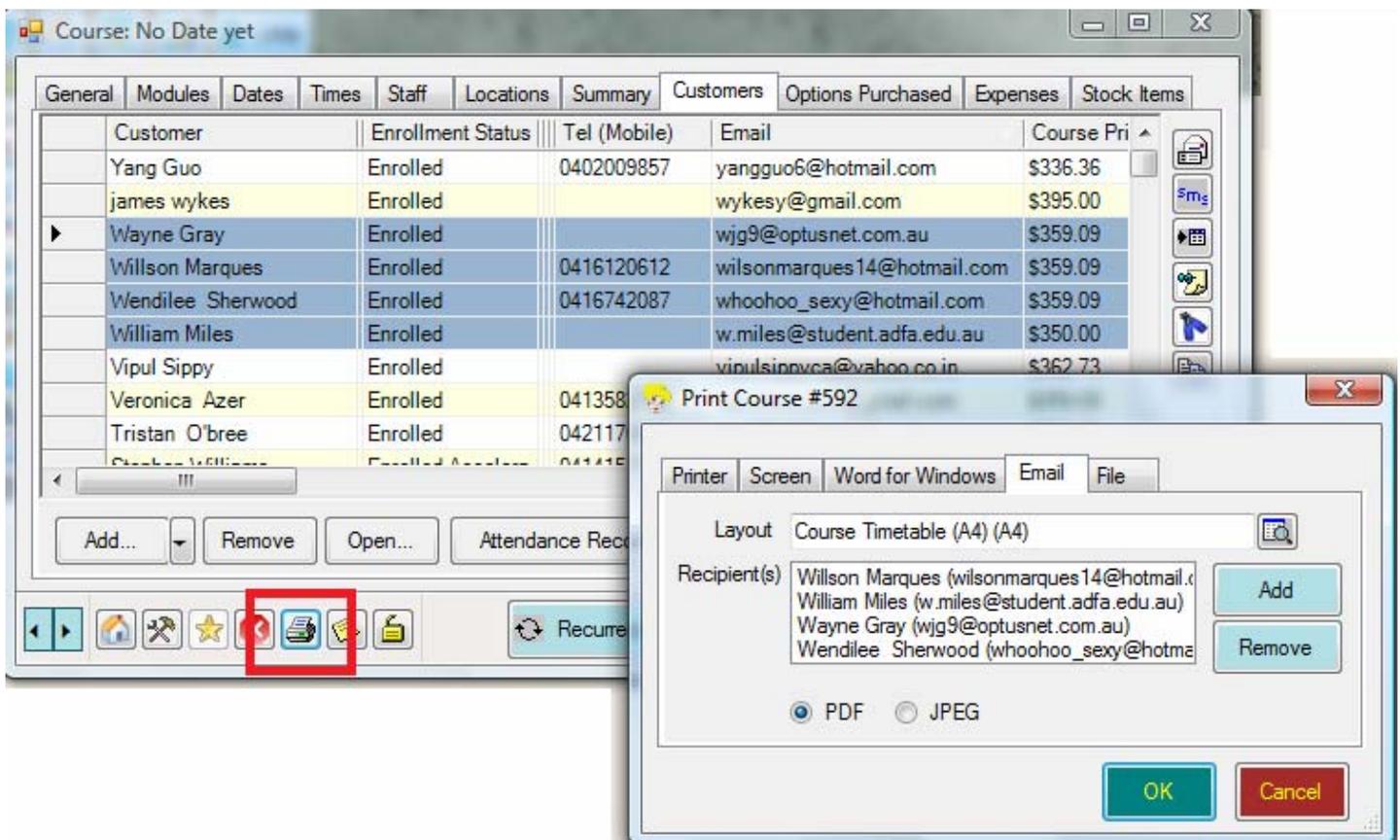
A Contact Method pick list has been added to the Enquiries tab of the Customer Search Wizard so you can search by the method that customers contacted the store.

Calendar

The Calendar has been reworked to display faster and use fewer Windows resources

Printing Course and Trip reports

Now, when you highlight one or more customers in the grid on the Course or Trip form and then click the Print button, the email addresses of those customer(s) will be automatically added to the email list. This makes it quicker and easier to email details of the course/trip to its participants.



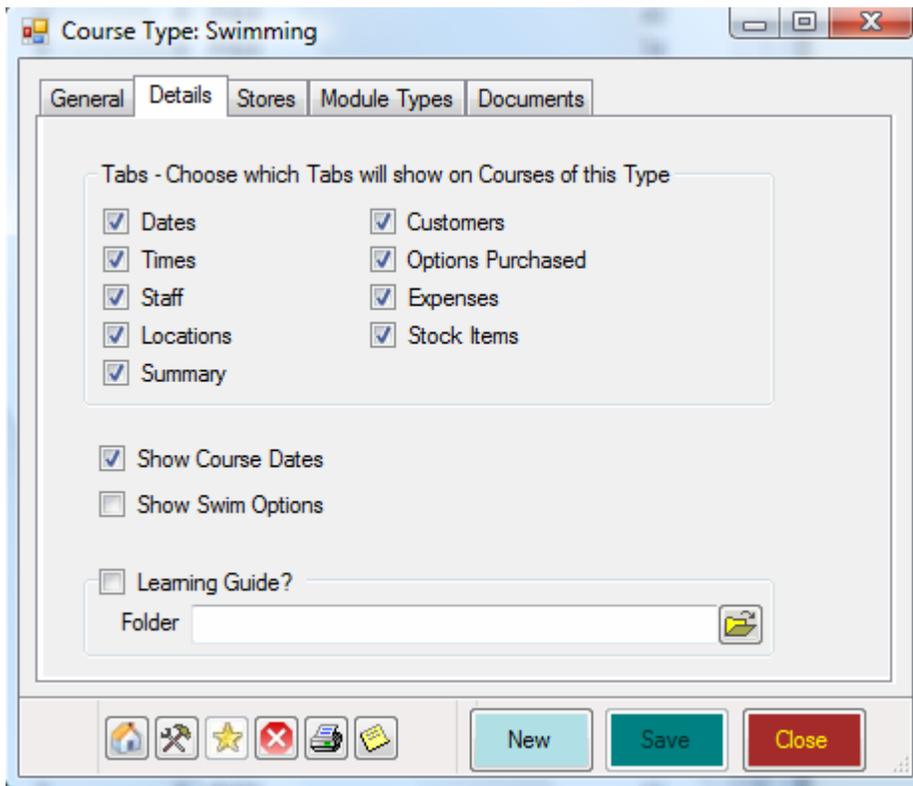
Course Options

A new tab called 'Details' has been added to the Course Type form. This contains a section called 'Tabs'. You can use the Tab check boxes to indicate whether the tab of that name should be shown when you create Courses of that type. E.g. for Swimming courses, you may want to turn off some of the tabs that you use for Scuba courses.

There is also a check box called 'Show Course Dates'. Remove the tick if you don't want to see the Start and End Date boxes on courses.

There is also a 'Show Swim Options' checkbox. Put a tick in that to turn on Location and Term boxes on courses of that type.

From now on, Brazil and Mexico are treated as containing States in the same way that USA, Canada and Australia have in the past – i.e. when one of those countries is selected, a pick list of States is displayed to choose from rather than a free text box.



Others

An 'Owes' column has been added to the results list on the Certification Search form. You can use this to see at a glance who still owes money for their course.

When issuing a Refund using the Transport merchant services application, the Reference number from the original Invoice is now automatically applied to the Refund.

It is now possible to have multiple Transport merchant services accounts setup on the same PC and to configure different Stores to use different accounts.

Issues Resolved

Previously, if you saved the Size and Position of the Multi-Sale form, the OK and Cancel buttons disappeared on the Multi-Sale prompt shown when selling an Air-Fill. This has been resolved.

Previously, if you saved the Size and Position of the Course or Trip Booking Wizard, the buttons at the bottom right of the form disappeared when the form was next opened. This has been resolved.

The Excel tab on the Print Dialog displayed on Search Results forms now works correctly.

Under some conditions, when typing a month or a year into the date selections at the bottom of the Calendar form in a leap year, a series of error messages resulted. This has been resolved.

Previously, if you selected a number of courses/trips on the Calendar, right clicked and Sent to Invoice when one of the courses/trips didn't have a Stock Item linked to it, an error resulted. This has been resolved.

Previously, an error resulted when importing/exporting using Excel if the computer was setup to use non-English Regional settings. This has been resolved.

Previously, an "Incorrect Syntax" error resulted when using the Sales Charts reports with certain parameters. This has been resolved.

Previously, information entered onto the Customers tab of the Account Statement report was ignored. This has been resolved.

Previously, an error resulted when Voiding a transaction that was paid for using the *Transport* merchant services application. This has been resolved.

Previously, tax was still charged on Service Booking parts for customers that were tax exempt.

Previously, when using the Recursion feature to create multiple courses or trips, the Start Day was incorrectly set when using the First XXXday of the month option.

The manner in which the Inventory Search Wizard calculates inventory values on a particular date has been changed.

Previously, when merging Stock Types and Trip Requirements referenced the Slave record an error resulted. This has been resolved.

Previously, under certain conditions when printing Barcode Labels using the Print Layout, multiple blank labels were printed after the first page. This has been resolved.

Previously, an 'Object Variable not set' error resulted when selling courses or trips that had documents linked to them that didn't exist. This has been resolved.