

ITCube CRM 2026.2 documentation



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Summary

The ITCube CRM is a comprehensive and easy-to-use internal process management tool. It gives you easy access to information important for your business and allows your business processes to be formalised. The software can be used to generate a full history of the operation of your business, regardless of the changes taking place within the company. ITCube CRM not only simplifies many time-consuming tasks, but it also offers unique options that other similar tools do not provide.

The ITCube CRM facilitates customer service processes and supports sales processes covering both products and services. This is achieved through quick and easy access to all information about your customers, suppliers or contact persons, a straightforward offer generator functionality and a sales plan management functionality. In addition, the software allows you to monitor long-term projects, to keep records of corporate documents or to create e-mailing campaign. It can also formalise your internal communication processes and establish channels for exchanging information with your business partners. Furthermore, the ITCube CRM system offers many unique features. These include, to name just a few, the option to connect a CRM system with a servicing module, or browser access to the application, plus an electronic mail module integrated with any IMAP email client. With a clear and intuitive control panel, the system is easy to use even for beginners.

The ITCube CRM is intended primarily for medium-size businesses, although it can be useful for small, thriving companies. It can exceptionally useful for companies with many customer service processes, with plenty of customer data to process, or with many personalised offers to prepare. Suppliers of equipment that needs professional post-sales servicing will find it the system very helpful. The ITCube CRM system can help you deal with your customers professionally and control your internal business processes. As a result, your processes will be streamlined, your costs reduced and your customer satisfaction levels improved.

Introduction

In the Information Age, it is difficult to imagine a modern business without professional IT infrastructure. Standard hardware and/or software solutions are no longer sufficient. To be able to compete on the market and meet your customers' expectations, your business needs specialist software. Employers to improve their business processes and to protect valuable information resources, some of which may be vital, against loss. Loss of customer information as a result of errors or mistakes made by your people or, for example, when a member of your staff that keeps plenty of information in their head leaves your company, can lead to serious operating disruptions. Attempts to retrieve information can be very long and expensive, and it is not unusual for some

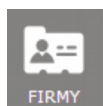
information to be lost irreversibly. For these reasons, having good software and using it effectively are fundamental to the efficiency of your company's operation.

In response to the expectations of our customers, ITCube Software has developed a comprehensive solution, called ITCube CRM. ITCube CRM is an IT system that integrates information management processes, creates new and properly formalised internal and external communication channels and offers telemarketing support.

Symbols used in the documentation

- The headings marked with an asterisk (*) indicate instructions that are visible only to the system administrator.
- Italicised text within sentences indicates the names of fields and system controls.
- Bolded text indicates the system's main menu items, i.e. a line of icons located at the top of the screen.

IMPORTANT: Most of the icons of the main menu are described. The option described in the documentation as **Companies->Add company** means you should click on this icon:



and then choose *Add company* from a drop-down menu.

Some of the icons of the main menu are not described. Below is a list of these icons and their descriptions.



- by clicking on this icon, you will be taken to the *Main Panel*;



- the Reports icon. The options described in the documentation as beginning with the word **Reports** indicate that you should click on this icon.



- the Users icon. The options described in the documentation as beginning with the word **Users** indicate that you should click on this icon.







- the System icon. The options described in the documentation as beginning with the word **System** indicate that you should click on this icon.

Icons used in the forms

Below is a list of the icons used in the process of entering data in the system.

- ☰ If you click on this icon, you will see a context menu with the options available within the context of a particular object. This icon will be displayed in the first column of search

engines and the view window of each record.

-  Click on this button
 - to see the system calendar. This icon is available next to each data fields. By clicking on this button, the system calendar will be displayed. Use it to define a date and time range, or a date and time.
 - to add existing objects to a form (e.g. Company, Project, Files, Sales Document items);
-  Use this button to add new objects (e.g. Company, Project, File) to a form. This button is displayed next to 
-  Use this button to delete data from a form. You can use
 - to delete entries in fields such as *Date, Files, Relations, Product Categories, Features*;
 - to delete items from trade documents and service documents;
 - to delete email attachments.

Terminology

All the names, messages and descriptions used in the system are configurable in system files and may have been modified during the implementation of the system so that they are easier to understand for the users. For this reason, when reading this document, you may find a phrase that is different in the system and different in the documentation. **This is normal and should not be interpreted as an error.**

In the documentation, the name of the ITCube CRM program is often used in the abbreviated version - ITCube.

The ITCube Software team thank you for your interest in the ITCube system. We hope you enjoy the efficiency of the software. If you have any questions or comments, please share them with us by email at support@itcube.pl.

Your first steps in ITCube CRM

Login procedure

To start using the ITCube CRM system, you need to log in to the system. In the *Login* window, enter your *account name*, *password* and *the interface language* and left-click on *Log in* or press *Enter*.

If you log in from your mobile phone, you will be offered an interface adapted to the screen dimensions of your mobile device. It contains the most important functions of *CRM*, *MAIL* and

PROJECTS modules. If you want to have access to all functions you should additionally check the option *FULL VERSION*.

IMPORTANT: The system administrator will provide each ITCube user with a unique user name and password.

IMPORTANT: Access to all the options in the system is allowed only to the person logged in as the system administrator. Other users will not have access to some of the options.

IMPORTANT: If you enter incorrect password for an account many times, it will be temporarily blocked. The number of incorrect attempts and the time of blocking is defined in *itcube.ini* file.

IMPORTANT: If the *itcube.ini* file defines the validity period of passwords, the effect of correct logging in may be to be forwarded to the mandatory password change form.

IMPORTANT: If the *itcube.ini* file also enables a two-step authentication mechanism then after the correct password is entered, an email token will be sent to the logging user's address. Only its correct entry in the second step will result in a correct login into the system.

Once you are logged in, *the Main Panel* of the *ITCube* system will be displayed, where you will have quick access to all the main options of the system.

Interaction with ITCube

You can interact with the system through

- *The Main Menu* of the system, which contains all the options available in ITCube: **Extranet, Service, Trade, Products, Companies, Files, Projects, Notes, Tasks, Mail/Fax, Intranet, Reports, Users, System;**
- *The Context Menu* you will find in different forms within the ITCube system;
- A personalised *Main Panel*, where you have quicker access to those options which are the most important for you;

ITCube CRM Main Panel

Once you are logged in to *ITCube*, you will be redirected automatically to the *Main Panel*, which is the 'management centre' of the system. It displays all the messages that apply to the user. These may include tasks that the user is supposed to complete soon, or a list of the most frequently used records for your contractors, contact persons or files, as well as information generated by the system in interaction with other users (e.g. costs for approval, notices, delegated tasks). The

Main Panel gives you very easy access to your key system resources. You will also be kept informed of all new events (e.g. email received, delegated/new/delayed tasks) that apply to you directly.

The Main Panel contains the following frames:

ITCUBE CRM

This frame displays licence and software version information, as well as details of the person logged in to the system, including the person's *first name* and *surname* and *names of the groups* that the person belongs to. If the user logged in to the system is the system administrator, the ITCUBE frame will also show the free memory and memory usage information for the computer on which the system is installed.

SEARCH

In this frame, you can search the system database for a contractor, a contact person, a product or service, a file, an order, an offer, a project or a device, or you can search the entire database (all the above categories). When you enter a phrase in the field provided and click on *Search*, the system will display a window with a list of the records that contain the phrase.

NEWS

Notice List

The *Notice* section contains links to all the notices entered in the system (with the entry date and a short description of the content). A particular notice will be displayed to a user that belongs to a group with the authorisation to read to the notice. The notice will be available to read for a time period set by the person that added the notice. If you click on the link, the ITCube system will display a window with the full details of the notice.

Absence List

The *News* frame also contains a subsection headed *Absences*, where the system displays a list of all the people currently absent, including details of when their absence periods will end. In addition to the current absences, future absences are also displayed (the timeframe is defined by the system administrator in the *itcube.ini* file).

Exchange Rates

The *Exchange Rates* section contains a list of the currencies available in the system, including the current exchange rates for the currencies (the rates in the system are downloaded from the servers of the National Bank of Poland). This option will be active only if the ITCube can connect to the Internet and if the automatic data exchange mechanism is enabled in the *itcube.ini* file.

TO DO

This frame displays information about new email/fax messages received and on new orders/service requests and tasks entered in the system. The tasks displayed on the screen are grouped by status (*New*, *Delayed*) and by deadline. Looking from the top, there are the following sections:

- **Orders / Service Requests / Email/Fax.** In this window, users with an Extranet authorisation are informed of new orders and service requests made through the Extranet module. Similarly, the user responsible for a particular order or service request entered in a CRM system will be updated on the order or service request, if the status of the order is set as "Active" or the status of the service request is set as "Active").

IMPORTANT: A user without the authorisation to View sales/purchases made by other users may, after clicking on the link on new orders, receive a number of orders that is different from that given in the brackets. This is because in this configuration, the Owner field value is limited to a person logged in to the system. Similar rules apply to providing users with information on active service requests.

Additionally, all users of the system are informed of new emails or faxes sent to them and stored in in-box. In the case of fax messages, a user with the authorisation to *Manage new faxes* are informed of the faxes that have been assigned to any other users. A user without the authorisation to *Manage new faxes* will only be informed of new faxes previously assigned to them by a person responsible for distributing fax messages internally.

- **New tasks/service tasks.** This section contains all the activities in respect of which the decision to carry them out has not been made yet (tasks with the *New* status). When you click on a link in this section, the system will display a window with all the details of a particular activity. More information is available in the section on **activities accepted**;
- **Delayed tasks/service tasks.** This window contains links to all the activities accepted but not completed before the deadline. If you click on one of the links, the ITCube system will display a form with the full details of a particular activity.
- **Tasks/Service tasks for today.** This section contains links to all the activities which have been accepted and for which the deadline is the current date (= today). If you click on one of the links, the ITCube system will display a form with the full details of a particular activity.
- **Tasks/Service tasks for tomorrow.** This window contains links to all the activities for which the deadline is the following date (= tomorrow). If you click on one of the links, the ITCube system will display a form with the full details of a particular activity.

IMPORTANT: To prevent the system from printing, in *Main Panel*, the details of all activities, the system has been designed to display only those activities which are labelled as *Important* or *Very*

Important. In the *itcube.ini* configuration file, it is possible to define the type of activities to be printed in the *Main Panel*.

- **Calendars.** In this window there is a system calendar showing the number of accepted tasks/activities for each day. Additionally, by clicking on a selected day you can check if there are any records with tasks/activities or absences related to you under the selected date. When you click on a date, the ITCube system will display a new window with a graphic presentation of how different activities are delegated for that day.

DASHBOARD

This section contains information for senior personnel about analytics and approval of the tasks performed by their subordinates. The first four sections (offers/costs/absences and mailings to approve) will display offers, mailings, costs and absences reported by those users who are subordinates of the person logged in on a particular workstation. More information about how to build a corporate structure (particularly in manager/subordinate relations) can be found [in the Adding a new user section](#).

Offers to approve

This window displays all links directing the user logged in on a particular workstation to a table with offers waiting to be approved by the user. If you click on one of the links, the ITCube system will display a table containing all the offers waiting to be approved.

Purchases to approve

This window displays all links directing the user logged in on a particular workstation to a table with purchases waiting to be approved by the user.

Costs to approve

This window displays all links directing the user logged in on a particular workstation to a table with costs waiting to be approved by the user.

Mailings to approve

This section contains links to all mailings to be approved or rejected by the person logged in on a particular workstation.

Absences to approve

This window displays all links directing the user logged in on a particular workstation to a table with offers waiting to be approved by the user.

Reports

This window displays reports accessed by a user logged in to the system. The first report is the *Dashboard (Sales)*, which displays the current status of sales. For the defined timeframe, the

following information is displayed: a sales pipeline, a breakdown of sales by month, a breakdown of sales by employee and a breakdown of sales by product category. Additionally, there is a list of offers and sales sorted by document value. Note that next to the *Generate* button, there is the option to narrow the scope of the report to be generated, e.g. to cover a particular product category, department or individual user (according to the document operator).

IMPORTANT: The Dashboard (Sales) report is visible only to users authorised to "*Generate the dashboard (sales/global) report*" or "*Generate the dashboard (sales/own department)*" report. If a user is authorised to generate a sales dashboard, but only for their own department, that user must, of course, be assigned to that department.

The second report is the *Dashboard (projects)* report, which shows the most important information relating to activities carried out within the context of projects. For the defined timeframe, the following information, in particular, is displayed: a breakdown of sales by project coordinator, a breakdown of sales by project template, the total working time with breakdown by project coordinator and the total working time with a breakdown by project template. Additionally, this report shows the projects / project phases that require immediate action as a result of delayed performance or an upcoming deadline. Note that next to the *Generate* button, there is the option to narrow the scope of the report to be generated, e.g. to cover a particular department only. If you select a particular department, the analysis will cover only entries made by users assigned to that department (according to the project coordinator).

IMPORTANT: The Dashboard (projects) report is visible only to users authorised to "*Generate the dashboard (projects/global) report*" or "*Generate the dashboard (projects/own department)*" report. If a user is authorised to generate a project dashboard, but only for their own department, that user must, of course, be assigned to that department.

The third report is the Dashboard (service) report, which shows the most important information relating to the maintenance department. For the defined timeframe, the following information, in particular, is displayed: the maintenance staff's working time (for maintenance tasks), a list of the maintenance tasks by type, the costs/income generated by the maintenance department by month. The report also shows tasks requiring immediate action (delayed tasks), tasks for which the deadline has expired or is soon to expire (all service requests other than *Closed* are displayed). Below, the report displays information useful for managing rentals and a ranking list of rentals. The first of the reports allows you to track rentals in progress (not returned) (all rentals other than *Returned* are listed). The second report is a *Ranking list of the longest-rented products* and displays the products (device types) that are rented out most frequently.

At the bottom of the maintenance manager dashboard there are ranking lists of guarantees and contracts broken down by man-hours (the analysis covers the working time for service tasks linked with a particular guarantee or contract for the defined timeframe). Note that next to the

Generate button, there is the option to narrow the scope of the report to be generated, e.g. to cover a particular department only. If you select a particular department, the analysis will cover only entries made by users assigned to that department (according to service request, guarantee, contract coordinator or service task performer).

IMPORTANT: The *Dashboard (service)* report is visible only to users authorised to “*Generate the dashboard (service/global) report*” or “*Generate the dashboard (service/own department)*” report. If a user is authorised to generate a maintenance dashboard, but only for their own department, that user must, of course, be assigned to that department.

The fourth available report is the *Offer funnel* report, which presents the capital accumulated in the various phases of offers. For users without *Generating trend analysis/offer funnel* rights a reduced version of this report will be presented, showing only the documents handled by the logged in user.

The fifth available report is the *Trend analysis* report for comparing selected indicators on a month-to-month and quarter-to-quarter basis. For users without *Generating trend analysis/offer funnel* rights a reduced version of this report will be presented, considering only the records handled by the logged in user.

The sixth report is the *Private sales plans report*, which shows the status of sales plans assigned to a particular user logged into the system.

IMPORTANT: The *Private sales plans report* is visible to users logged into the system if there is at least one sales plan meeting the following criteria:

- it is marked as *Active*,
- it includes the particular user logged into the system,
- the *Reporting* field contains the group to which the particular user is assigned.

PROJECTS

This window displays information about all the projects for which a particular user logged into the system has created a short name. In such a case, the ITCube system will display the short names of all projects with bookmarks created by the particular user. The name of the project will also serve as a link to a window showing the full details of the project.

Next to name of the project, there is a button you can use for quick access to a number of options related to that project.

BOOKMARKS

This window contains various information generated by the user for better comfort of work.

Bookmarks Contractors

In the *Main Panel of the ITCube* system, you can choose to create bookmarks (links) to those contractor records that you use most frequently. This is to make your work easier. To create a bookmark for a contractor, use the **Companies->Company list** option. Then click on the button next in field *No.* to select the *Add to bookmarks* option. Now, in the *Main Panel*, a link to the bookmarked contractor record will be displayed. In addition, to left of the name of the contractor, you will find a button that you click on to open a context menu for that contractor.

Bookmarks Contact persons

In addition to bookmarks for contractors, in the *Main Panel of the ITCube* system, you can choose to create bookmarks (links) to those contact person records that you use most frequently. To create a bookmark for a contact person, use the **Companies->Contact list** option. Then click on the button next in field *No.* to select the *Add to bookmarks* option. Now, in the *Main Panel*, a link to the bookmarked contact person's record will be displayed.

Bookmarks Files

The ITCube system also allows you to create bookmarks for those documents (files) that you use most frequently. To create a bookmark for a document (file), use the **Files->Document/Shortcut list** option. Then click on the button next in field *No.* to select the *Add to bookmarks* option. Now, in the *Main Panel*, a link to the bookmarked document (file) will be displayed.

Bookmarks Reports

The ITCube system also allows you to create bookmarks for those reports that you use most frequently. To create a bookmark for a report, check the *Bookmark this report on the main page* option while adding a report. Now, in the *Main Panel*, a link to the bookmarked report will be displayed. In addition, to the left of the name, you will find a button that you click on

- to generate a report (*Generate report*);
- to delete a bookmark (*Delete bookmark*).

System options

ITCube CRM help

When you click on **System->Help**, you will have access to the documentation of the ITCube system in PDF format.

Main panel

The **System->Main panel** allows you to go to the *Main Panel of the ITCube* system at any time.

Search the database

In the ITCube system, you can search many areas of the system for a particular phrase. You can use this functionality if, for example, you are looking for a particular resource, but you only have fragmentary information about that resource, especially if you can't remember where the resource is available within the system. To use the search function, choose **System->Search the database**. The ITCube system will open a new form with two sections.

In the first section, you can enter a search phrase and define the areas of the system to be searched. In the second section, the search results are displayed. Note that the more areas you define (particularly the 'electronic mail' area), the more time the system will need to complete the search. It is, therefore, recommended that all the search areas should be defined in exceptional cases only. When you enter the search phrase and define the areas to be searched, you can also define the number of results to be displayed. This is defined for each type of information. Also, you can instruct the system to sort the results by enabling the *Sort the results within the group* option. As this function will normally slow down the search process, the default setting of this function is 'disabled'. If you know that the resource you are looking for is one that you entered yourself, you can check the *Search only my records* option to speed up the search process. When you have defined all the search criteria, click on *Search*. The search results will be displayed in separate sections, each for a different search area.

Graphics repository

To define the graphics to be used to send emails or print sales documents, use the **System->Graphics repository** functionality. The *Graphics repository* form contains two sections. The first section (*Add a graphics*) allows you to register a graphic file in the ITCube system. To select a file, click on *Search*. Click on *Add* to confirm your choice. If you click on the *Cancel* button, you will be taken to the *Main Panel* of the ITCube system, which means that the selected graphic file will not be registered.

The section section (*Modify/delete graphics*) allows you to change the name and/or type of a graphic file registered in the ITCube system. To change the name and/or type of a graphic file, select the file from a drop-down list in the *File* field and enter the new details. If you want the graphic file to be available only to you, choose *Private* in the *Type* field. If the file is to be available to all users, choose *Public* in the *Type* field. Click on *Save* to confirm your choice. Similarly, to delete a graphic file, select the file from a drop-down list in the *File* field and click on *Delete*. You can view each graphic file at any time by clicking on the icon next to the *File* field.

Configure automations (*)

The ITCube system allows you to define actions to be performed automatically when the set conditions are met. To manage automations, use the **System->Configure automations** option.

After selecting this option, the system will open a window consisting of two sections. In the first section, select the type of automation you want to configure. There are five types to choose from (depending on the modules you have):

- If a SALE DOCUMENT has been entered delegate the TASK
- If a COMPANY has been entered delegate the TASK
- If a MAIL CORRESPONDENCE has been received delegate the TASK
- If a SALE DOCUMENT has been entered send the MAIL CORRESPONDENCE
- If a COMPANY has been entered send the MAIL CORRESPONDENCE

After selecting a specific type, the system will display a section below that allows you to define the details of the indicated automation. You can associate up to five independent actions with each automation type. To see the details of a particular action, first select the *Active* option. The definition of each action consists of parameters describing the conditions that must be met for the action to be executed and data describing the result of the action execution.

As an example, let's select the type *If a SALE DOCUMENT has been entered delegate the TASK* and in the first section select *Active* checkbox. On the left side of the section we get a set of parameters describing the sales document. So, for example, in the *Type* field we can select the value *Offer* and additionally in the *Minimum value* field enter *10 000*. The action condition defined in this way means that the action will be executed only if an offer has been added whose total value in the system currency exceeds 10,000 PLN net. On the right side of the section we get a set of parameters describing the task object. Thus, in the *Type* field let's choose *Reminder*, while in the *Task date* field let's indicate the value of *One week after addition the sales document*. If we leave the values of the other fields unchanged, it means that as a result of performing the action, a task will be entered into the system, the delegator of which is the person adding the offer, while the executor is the person handling the offer. The date of a task of the *Reminder* type will be set with an offset of 7 days from the date of adding the offer, and its subject will contain a copy of the subject of the sales document.

Additional forms (*)

The ITCube system allows you to create forms. To create a new form or to modify an existing one, choose the **System->Additional forms** option. When you choose this option, the system will open a new window with two sections. In the first section you must enter information describing the form to be modified.

- *Form* (mandatory). This is a drop-down list with a list of the forms to be modified. In this fields you can also choose to create a new form. To do so, click on *Add new form*. When you have selected a form to be modified, the system will fill in the following field so that you can modify them.

- Choose from the *Form*, *Auto Form*, *Calculation* options to define how the form is to be used, i.e.
 - a standard form,
 - an auto form: the values of some fields in the form will be calculated automatically using specified formulas;
 - calculation: the form will be used when creating an offer/order for automatic price calculation.
- *Object name*: use this field to enter the name of the object described by the form (e.g. questionnaire).
- *Active* button: a button that activates a form;
- *Mobile* button: a button that activates a form also within mobile interface context;
- *Form name*: use this field to enter a new name for a form (this name will be displayed in the main menu of the ITCube system, where you will be able to enter information in the form, e.g. **Add questionnaire**);
- *Form list name*: use this field to enter a new name for a form viewer (this name will be displayed in the main menu of the ITCube system, where you will be able to view/search information entered in forms, e.g. **Questionnaire list**);
- *Active* button: a button that will activate the option to search information entered through the form you are adding;
- *Mobile* button: a button that will activate the option to search information entered through the form you are adding also within mobile interface context;
- *Form note*: use this field to provide a description of the form.
- *Visibility*: this is a multiple-choice field where you can define which user groups will have access to the form you are adding. The form will not be available to users outside the defined access group(s).
- *Add/Modify records*: this is a multiple-choice field where you can define which user groups will be able to add/edit records in the form. Users outside the defined access group(s) will only be able to view the information entered through the form, but will not be able to add or modify any records.
- *Menu*: use this field to choose where you would like to use two additional options, i.e. adding and viewing the information entered through the form you are defining.
- *Company context menu*: use this button to activate the option to add information to this form from the context menu for a contractor.
- *Project context menu*: use this button to activate the option to add information to this form from the context menu for a project.
- *Product context menu*: use this button to activate the option to add information to this form the context menu for a product.
- *Service context menu*: use this button to activate the option to add information to this form the context menu for a service request.
- *Document context menu*: use this button to activate the option to add information to this form the context menu for a file document.

- *Insert auto-numbering section:* the system will automatically number your forms, using the format set in the itcube.ini file (the standard form is YYYY/MM/RR);
- *Insert a Company/Contact section:* this allows to create a link with a contractor/contact person.
- *Insert a project/project stage section:* this allows to create a link with a project and a project phase.
- *Insert a product section:* this allows you to select a product using a products viewer.
- *Insert a service section:* this allows you to select a service request using a service requests viewer.
- *Insert an operator section:* this allows you to select an operator from the full list of system users.
- *Insert a date section:* use this to add a time range section.
- *Insert document section:* use this to add a *Files* field to a form.
- *History settings:* use this to define whether the information entered through the form you are defining is to be sent to the historical parts of the objects represented by the above active sections.

The *Calculation definition* window is active only if the *Calculation* option is checked. Use this window to define the following calculation settings.

- *Company groups:* use this field to select a contractor subgroup to which the calculation will apply.
- *Product category:* use this field to select a product subgroup to which the calculation will apply.
- *Formula:* use this field to define the algorithm for the calculation to modify a particular item in an offer. The language used to record the user's choices is the Javascript language. This language allows you to use also the following variables specific to the ITCube system:
 - !ProductName!
 - !ProductShortName!
 - !ProductNote!
 - !ProductCode!
 - !ProductOfferAmount!
 - !ProductOfferAmount!
 - !ProductUnit!
 - !ProductVat!
 - !ProductCost!
 - !ProductCostCurrency!
 - !ProductPriceBeforeDiscount!
 - !ProductPrice!

- !ProductPriceCurrency!
- !ProductDiscount!
- !ProductAddField1!,...,!ProductAddField10!
- !Field1!,...,!Field50! - (variables describing the content of the fields of the calculation form).

The last window is used to define up to fifty fields within a particular form. This window has fifty rows, each describing one of form field and contains the following information:

- *Name*: field name.
- *Type*: field type. The following field values are available: *Inactive*, *Text field*, *Numeric field*, *Note field*, *Drop-down list*, *Date field*, *Link field*, *Hidden field*. Additionally fields from 51 to 60 offer all the above types in an encrypted version, i.e. saved in the database with the use of AES cryptographic algorithm. If the field is a drop-down list, the content of the field must also be defined. You can do it using The **System->Additional dictionaries** option.
- *Separator* - if the field contains a non-empty value prior to the field, an additional graphic section header will be generated. This section will be valid for the next field with a defined separator content. The mechanism allows for graphical grouping of thematically related fields.
- *Obligatory*: use this button to check that the field is obligatory.
- *List*: use this button to check that the field is to be part of the viewer of the information entered through the form you are adding.
- *Subject*: use this button to check that the field is to be displayed in the primary object history information as a short description.

IMPORTANT: At the bottom of the page, you can activate fields such as *Number*, *Company*, *Project*, *Product*, *Service* and *Operator* in the viewer for the form you are defining.

IMPORTANT: When you have defined a new form, log in to the system again so that the new form is displayed in the main menu.

The information recorded through additional forms can be viewed using automatically generated viewers. Importantly, these viewers can also be used to export records into a CVS file. This functionality is available to users authorised to *Export additional forms*.

Additional dictionaries (*)

The ITCube CRM allows you to define additional fields in most of the forms available in the system. Additional fields can be defined by the system administrator in the *itcube.ini* file, entering the field name, indicating whether it is an obligatory field, setting the position of the field within the form and defining the field type. If such an additional field is to be a drop-down list, the content of the field must be defined. To do this, use the **System->Additional dictionaries**

option. When you choose this option, the system will open an *Additional dictionaries* form with two sections. Use the first one to add list-type items to additional fields. To do this, select the name of a form with an additional field, select the name of a field and enter the name of the item. To modify the details of a drop-down list item defined in the *itcube.ini* file, use the second section.

IMPORTANT: In the *Additional dictionaries* form, the administrator can also define the values of the drop-down lists used in the defined additional forms.

Integration setup (*)

The *Integration setup* form allows you to set up and configure a link between the ITCube system and your external ERP software. Currently, the ITCube systems supports the following software: Comarch ERP Optima, Comarch ERP XL, WF-MAG, Subiekt GT, Symfonia 2.0, SAGE ERP, Enova365 and StreamSoft Prestiż. Depending on the integration controller used (the *SynchronizerClass* field in the *itcube.ini* file), this form can contain different fields. When you enter information in the form and click *Save*, you will be able to verify whether the information in the form is correct. To do so, click the *Preview* button. A diagnostic page will be displayed.

Integration links (*)

The *Integration links* form allows you to manually link objects (*Companies, Products, Users*) saved in the ITCube system with objects in an external ERP system with which ITCube has been integrated. To link, for example, two companies, select an ITCube company that is not registered in the external ERP system. Then select a company from the database of external ERP software. Click the *Save* button. The system will link the two contractors.

IMPORTANT: You can only link unlinked companies. The *Companies/Products* list of external ERP software will include only objects not linked with any ITCube records. To change a link quickly, delete the existing link (this option is available in the context menu for the linked company: *Unregister from ERP*) first and set up a link with a new object then.

IMPORTANT: This option is available only if the system is integrated with the following software: Comarch ERP Optima, Symfonia 2.0, SAGE ERP and WF-MAG.

Importing company lists (*)

The ITCube system allows you to enter information about contractors in two ways. One is to use the **Company->Add company** option. The other is to import a ready-to-use text-file contractor list into the system. This file will only be recognised by the system if it is formatted as follows:

- Each line must describe one contractor only;
- All record fields must be separated with a tabulator.
- Each string of more than one word must be contained in inverted commas;

- The sequence of details in the file is fixed, as follows: Name*, Headquarters, Group, Industry, Discount, Acquisition date, Legal personality, VAT ID, REGON No., Bank account, Street, Town/City, Postcode, Region, Country, Phone (area code), Phone, Phone (ext.), Email list, Domain name list, Operator, Short name, Additional phone (area code), Additional phone, Additional phone (ext.), Fax (area code), Fax, Fax (ext.), Website, Status, Acquisition type, Potential, Description, Active (values: Yes/No), Default price, Owner (Login)* and additional fields defined in the implementation phase.
- All fields marked with an asterisk (*) must be completed;
- Each date must have the following format: RRRR-MM-DD (e.g. 2014-09-25);
- In the case of systems based on MySQL, use the Windows-1250 code page. If the system is based on MariaDB, save the file using the UTF-8 code page.

Examples: "Coca-Cola" "" Customer ICT "10" "2018-02-02" "sp. z. o. o"
 677-174-38-56 356234213 "1234-243234-123421-86868" "Street 5/6" Cracow 22-
 133 "Lesser Poland" Poland 12 34534534 22 "tomek@intelligent.pl,
 t.kowalczyk@iteligent.pl" intelligent.pl MarekC CocaCola 12 86575676 444
 12 6789567 333 http://intelligent.pl Potential Extranet High
 "This is a contractor description. Yes Wholesale price 1 MarekC
 "Additional field 1" "Additional field 2" "Additional field 3" "Additional field 4"
 "Additional field 5"

IMPORTANT: Take special care when preparing files to be used to import data. If the above information is incorrect (e.g. because a non-existent industry name is provided), no data will be imported by the system. In addition, the incorrect record will be marked with a red icon and the incorrect value will be marked in red.

Not all fields must be completed. If a file line does not contain all the columns, these will be completed automatically with empty entries. If a column contain an empty entry (=an empty string of characters or a sequence of empty characters (e.g. spaces), the ITCube system will use default values. Below is a list of default values.

- The *Active* column: *Yes*;
- The *Default price* column: *Retail price*;
- The *Owner* column: *Admin*;

When you have created a correct file with all the required fields, you can proceed to import the file. To do so

- select the **System->Company import** option from the system menu.
- A *Company Import* form will be displayed. Press *Search* to specify the location of the contractor information file to be imported.
- Press the *Next* button below the *File name* field. Pressing the button will open a viewing screen where you can check if the file is correct. If all the information is entered in the

correct sections and there are no red marks, press *Import*. The file will be uploaded into the system. You can also set the following authorisations: *Read*, *Write* and *History* for each contractor imported into the system. To do this, use the *Rights* section, where you can set user authorisations in respect of each imported record before you press *Import*.

- When the import process is completed, the system will display a report containing all the imported records. Each record will be assigned one of two statuses: *OK*, indicating that the record has been added to the database successfully or *Data error*, meaning that the record has not been added because it contains incorrect data.

Importing contact person lists (*)

The ITCube system allows you to enter information about contractors in two ways. One is to use the **Company->Add contact** option. This is described in the Companies section. The other is to import a ready-to-use text-file contact person list into the system. Of course, this file will only be recognised by the system if it is formatted as follows:

- Each line must describe one contact person only;
- All record fields must be separated with a tabulator.
- Each string of more than one word must be contained in inverted commas;
- The sequence of details in the file is fixed, as follows: Surname*, First name, Company, Sex, Age, Title, Acquisition date, Communication channel, Phone (area code), Phone, Phone (ext.), Email list, Street, Town/City, Postcode, Region, Country, VAT ID, National Person ID, Fax (area code), Fax, Fax (ext.), Mobile phone (area code), Mobile phone, Superior, Department, Position, Speciality, Importance, Description, Extranet Login, Extranet password, Extranet account active (values: *Yes/No*), Active (values: *Yes/No*), Acquisition type, Status, Operator (*Login name*), Owner (*Login name*)*, Link, Communicator number plus five additional fields defined in the implementation phase.
- All fields marked with an asterisk (*) must be completed;
- Each date must have the following format: RRRR-MM-DD (e.g. 2018-09-25);
- In the case of systems based on MySQL, use the Windows-1250 code page. If the system is based on MariaDB, save the file using the UTF-8 code page.

Examples: Krause Bartosz "Private individual" Male 20-24 MA
 "2018-03-05" "Phone" 12 5555555 444 t.kowalczyk@intelligent.pl
 "Main street 5/6" Cieszyn 43-400 "Lesser Poland"Poland 677-174-38-21
 400780522 33 7777777 333 501 393169None Network
 Programmer "JAVA, C++" VIP "This is a contact person description." MarekC
 Password Yes Yes Telemarketing "Potential customer" PrzemekC
 MarekC 12345 Krause "Additional field 1" "Additional field 2" "Additional
 field 3" "Additional field 4" "Additional field 5"

Not all fields must be completed. If a file line does not contain all the columns, these will be completed automatically with empty entries. If a column contain an empty entry (=an empty

string of characters or a sequence of empty characters (e.g. spaces), the ITCube system will use default values. Below is a list of default values.

- The *Extranet Account Active* column: *Yes*;
- The *Active* column: *Yes*;
- The *Owner* column: *Admin*;

When you have created a correct file with all the required fields, you can proceed to import the file. To do so

- Select the **System->Contact import** option from the system menu.
- A *Contact persons import* form will be displayed. Press *Search* to specify the location of the contact person information file to be imported.
- Press the *Next* button below the *File name* field. Pressing the button will open a viewing screen where you can check if the file is correct. If all the information is entered in the correct sections and there are no red marks, press *Import*. The file will be uploaded into the system. You can also set the *Read* and/or *Write* authorisations for each contact person imported into the system.
- When the import process is completed, the system will display a report containing all the imported records. Each record will be assigned one of two statuses: *OK*, indicating that the record has been added to the database successfully or *Data error*, meaning that the record has not been added because it contains incorrect data.

Importing note lists (*)

In addition to contractors and contact person, you can import notes into the system. The note file to be imported must be prepared as follows:

- Each line must describe one note only;
- All record fields must be separated with a tabulator.
- Each string of more than one word must be contained in inverted commas;
- The sequence of details in the file is fixed, as follows: Date (from)*, Time (from)*, Date (to)*, Time (to)*, Type*, Subject, Company, Contact person (*Full name*), Project, Project stage, Note, Owner (*Login name*)* plus ten additional fields defined in the implementation phase;
- All fields marked with an asterisk (*) must be completed;
- Each date must have the following format: RRRR-MM-DD (e.g. 2018-09-25) and time must have the following format: HH-MM (e.g. 09:03). If the *Date (from)/Date (to)* fields are left empty, the system will insert the current date in them.
- In the case of systems based on MySQL, use the Windows-1250 code page. If the system is based on MariaDB, save the file using the UTF-8 code page.

Examples: "2018-01-11" "09:00" "2018-02-11" "19:00" "Business trip"
"Note subject " "Coca Cola" "Smith John" "AD portals" "Press ads" "Note
description" "admin" "Additional Field 1" ... "Additional Field 10"

IMPORTANT: If the *Company field contains an incorrect entry, the system will mark red the Company and Contact person.*

Not all fields must be completed. If a file line does not contain all the columns, these will be completed automatically with empty entries. If a column contain an empty entry (=an empty string of characters or a sequence of empty characters (e.g. spaces), the ITCube system will use default values. Below is a list of default values.

- The *Time (from)* column: *08:00*;
- The *Time (to)* column: *08:00*;
- The *Date (to)* column: *The Date (from) column*;
- The *Type* column - default value *Note*;
- The *Subject* column: **No subject**;
- The *Owner* column: *Admin*;

When you have created a correct file with all the required fields, you can proceed to import the file. To do so

- Select the **System->Note import** option from the system menu.
- A *Note import* form will be displayed. Press *Search* to specify the location of the note information file to be imported.
- Press the *Next* button below the *File name* field. Pressing the button will open a viewing screen where you can check if the file is correct. If all the information is entered in the correct sections and there are no red marks, press *Import*. The file will be uploaded into the system. You can also set the *Read* and/or *Write* authorisations for each note imported into the system.
- When the import process is completed, the system will display a report containing all the imported records. Each record will be assigned one of two statuses: *OK*, indicating that the record has been added to the database successfully or *Data error*, meaning that the record has not been added because it contains incorrect data.

Importing product lists (*)

To import products into the ITCube system, follow these rules to prepare a file:

- Each line must describe one product/service only;
- All record fields must be separated with a tabulator.
- Each string of more than one word must be contained in inverted commas;
- The sequence of details in the file is fixed, as follows: Name*, Code, Type, Category, Sales VAT, Purchase VAT, Active discount (values: Yes/No), Retail price, Currency (of the retail price), Purchase price, Currency (of the purchase price), Wholesale price 1, Currency (of wholesale price 1), Wholesale price 2, Currency (of wholesale price 2), Wholesale price 3,

Currency (of wholesale price 3), Promotional price, Currency (of the promotional price), Additional price, Currency (of the additional price), Minimum quantity (from), Maximum quantity (to), Package size (in), Description, Primary package (unit of measurement), Secondary package (unit of measurement), PKWiU code, ERP Id, Catalogue number, EAN, Producer, WWW, Supplier, Supplier description, Coordinator (*Login name*), Active (values: *Yes/No*), Owner (*Login name*), Additional field 1, Additional field 2, Additional field 3, Additional field 4, Additional field 5, Translation of the name 1, Translation of description 1, Translation of name 2, Translation of description 2, Translation of name 3, Translation of description 3, Translation of name 4, Translation of description 4, Translation of name 5, Translation of description 5.

- All fields marked with an asterisk (*) must be completed;
- Each product has six prices, and there is a currency linked with each price. Not all prices must be given, but even if you do not enter a price, you must fill in all the currency columns (e.g. by entering PLN);
- For prices, always use the dot (.) sign instead of the comma (e.g. 178.99);
- In the case of systems based on MySQL, use the Windows-1250 code page. If the system is based on MariaDB, save the file using the UTF-8 code page.

Examples: "Monitor" "" "Product" "/" 22% 7% "Yes" "499.59"
 "PLN" 180 "USD" 480 "PLN" 170 "EUR" 475 "PLN" 170 "EUR" 170
 "EUR" 2 0 1 "This is a product description. " "PIECE"
 "UNIT" "Code" "ERP Id" "CAT. NO." "EAN" "Manufacturer" "URL" "Belinea"
 "Belinea Poland" "admin" "Yes" "admin" "Field 1" "Field 2"
 "Field 3" "Field 4" "Field 5" "English name" "English description"

Not all fields must be completed. If a file line does not contain all the columns, these will be completed automatically with empty entries. If a column contain an empty entry (=an empty string of characters or a sequence of empty characters (e.g. spaces), the ITCube system will use default values. Below is a list of default values.

- Column *Type* - default value *Product*;
- Column *Category* - default value: */*;
- Column *Purchase VAT/Sales VAT* - default value: *22%*;
- Column *Active discount* - default value: *Yes*;
- Columns *Currency* - default value: *PLN*;
- Columns *Price* - default value: *0*;
- Column *Minimum quantity (from)/Maximum quantity (to)/Package size (in)* - default value: *1*;
- Column *Active* - default value: *Yes*;
- Column *Coordinator/Owner* - default value: *Admin*;

When you have created a correct file with all the required fields, you can proceed to import the file. To do so

- select the **System->Products import** option from the system menu.
- A *Products import* form will be displayed. Press *Search* to specify the location of the products/services file to be imported.
- Press the *Next* button below the *File name* field. Pressing the button will open a viewing screen where you can check if the file is correct. If all the information is entered in the correct sections and there are no red marks, press *Import*. The file will be uploaded into the system. You can also set the following *Read* and *Write* authorisations for each of the products/services imported into the system.
- When the import process is completed, the system will display a report containing all the imported records. Each record will be assigned one of two statuses: *OK*, indicating that the record has been added to the database successfully or *Data error*, meaning that the record has not been added because it contains incorrect data.

IMPORTANT: You can use the *Product import* to enter only basic information about a particular product. All other content (such as active promotions, photographs, files) should be added using the **Products->Product/Service list** option and the selected record should then be modified using the *Edit record* option.

IMPORTANT: You can also use the *Product import* to update records. A record is updated by overwriting all the fields (or only the price list field), if the imported file contains an entry with an identical code or catalogue number. To complete an import process in the update mode, check the *Update existing records* option.

Importing documents (*)

The ITCube system allows you to import an entire file directory previously set up on a computer used as a server for the ITCube system. Once you prepare all the files to be registered in the system, you can proceed to import them. To do so :

- Copy the files into the *ITCube_Home/fileBuffor* directory (where *ITCube_Home* means the location where the ITCube system is installed);
- Select the **System->Document import** option from the system menu.
- Pressing the button will open a viewing screen where you can check the content of the directory to be imported. In this screen, you can also specify the target folder, the owner of the imported files and to decide whether the files correctly imported should be deleted physically from the import directory. You can also set the *Read* and/or *Save* authorisations for each document imported into the system. Additionally, the system will allow us to perform optimization operations on graphic files in BMP, PNG and JPG-RGB format (other file formats are not modified). To adjust the dimensions to the recommended values, select the appropriate value in the *Scale graphic* field. The drop-down list contains the recommended

maximum dimensions of the graphics for the product icon, contact person/employee photo and company logo. Additionally, it also contains a list of all document directories for which the preferred sizes have been defined. This option is worth using as it often allows you to reduce the volume of the binary file several times while maintaining sufficient quality for the ITCube system.

- If the directory contains all the required files, you can press the *Import* button. All the files will be registered in the system. When the import process is completed, the system will display a report containing all the imported records. Each record will be assigned one of two statuses: *OK*, indicating that the record has been added to the database successfully or *Data error*, meaning that the record has not been imported because a document with the same name has been found in the selected folder.

Interface personalisation

The *Configure interface* form allows you to decide what information should be displayed on the main panels for individual users and choose interface color schemes/wallpapers. To change the settings of the account to which you are logged in, select the **System->Configure interface** option. The ITCube system will open a new form with four fields. In the first of them you can define which sections are to be displayed on the main panel. The second field allows you to enter any number of website addresses to be displayed as quick links. All these addresses must be separated with a comma. The next fields allow you to select the color scheme and wallpaper of the system.

IMPORTANT: If you are logged in as an administrator, the *Configure interface* form will contain an additional field (*Owner*). As an administrator, you can use this field to configure the desktop for any user.

Company details

The *Company details* form allows you to save all contact and registration information of the ITCube system owner. This data is used by the Trade module when printing sales documents and when integrating with the KSeF system. It is possible to define several companies and then indicate them in the templates of sales documents.

Changing passwords

The *Change passwords* form allows you to change the passwords linked with the account you are logged in to. To change the password for access to the account and the related SMTP and IMAP passwords, select the **System->Change passwords** option. The ITCube system will open a new form with the following fields:

- *Your old ITCube password*
- *Your new ITCube password*

- *Confirm the new ITCube password*
- *Your new STMP password (or OAuth2.0 token if ITCube OAUTH module is enabled)*
- *Your new IMAP password (or OAuth2.0 token if ITCube OAUTH module is enabled)*

If all the fields have been filled in correctly, the ITCube system will change the passwords and re-open the main panel of the system. If any of the fields has been filled in incorrectly, you will be asked to fill the entire form again (for security reasons). All the fields filled with incorrectly will be marked in red.

IMPORTANT: If you wish to change only one of the above passwords, all you need to do is to uncheck the *Change* option in all the other items.

IMPORTANT: Please note that the login names and passwords in the ITCube system are case-sensitive.

IMPORTANT: If the mechanism of storing the history of passwords is enabled, the system will not allow us to define a new password that has already been used in the past. The number of past passwords checked during this process is defined in *itcube.ini* file.

Session history

The administrator and any other user of the ITCube system with the authorisation to view the session history can view open or closed sessions. They are also allowed to access a full log of the events that happened as part of each session. Use the **System->Session history** option to view the session history. When you choose this option, the system will open a *Session history* form with the following columns:

- *No.*
- *Date*
- *User*
- Additional information (this contains additional information). For a session, this is the location from which the user was connected; for events, the additional information is a full description of the event.

At the bottom of the form, you can choose whether you are wish to view a *closed session* or an *active session*, or a particular *event*. In the case of events, you can narrow down the results to a specific type of events. Examples include: adding, editing, updating, viewing and exporting.

The administrator will be able to delete events older than a specified date. As the system will normally gather a large amount of information about events, this operation should be performed at certain intervals, e.g. annually.

In the first column on the left (No.), which contains the record number, you will find a button. If you click this button, a handy menu will be displayed to give you access to a full list of the events as part of a particular session. Alternatively, you can close the session using the menu.

Closing the session

To close the ITCube system session, use the **System->Logout** option. A login page will be displayed as an effective way to prevent unauthorised persons from access to the resources of the system.

IMPORTANT: For security reasons, every time you stop using the ITCube system, you should logout by using the **System->Logout** option.

System users

Before starting to use the ITCube system, it must first be set up as necessary. Setting up the system means entering all the necessary details for the company (e.g. defining user groups, setting new user accounts, describing company departments etc.).

Company departments (*)

To manage the Company department dictionary, use the **Users->Dictionary->Department**. A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The Company departments dictionary does not allow you select a default value.

User groups (*)

To manage the User Group dictionary, use the **Users->Dictionary->User group**. A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The information entered in this form will be used in the system, e.g. when setting a new user account, you will be able to assign the user to a particular user group.

IMPORTANT: ITCube system user groups are very important in terms of the availability of database records. When adding any records, access authorisations (read, write or history) are given to user groups.

IMPORTANT: In the ITCube system, a default user group (*Default Group*) is pre-defined. All users not assigned to any other user group in the system will be assigned to this default group automatically. This user group cannot be deleted.

IMPORTANT: In the ITCube system, a group called **Only authorised users** is pre-defined. If a user is assigned to this group, they have access to those records which authorizations the owner designated as **Only authorised users**.

IMPORTANT: The User groups dictionary does not allow you to select a default value.

User competences (*)

To manage the "User competences" dictionary, use the **Users->Dictionary->Competence**. A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The *Users competence* dictionary does not allow you to select a default value.

IMPORTANT: The information entered in this form will be used in the system, e.g. when setting a new user account, you will be able to define any number of competences for that user. The system also provides you with a tool you can use to search the system database for people with specific skills.

Adding a new user

The *Add user* allows you to add new users to the system. To register a new user, you must provide the user's personal details, occupation/position and authorisations assigned to the user. To add a new user, choose the **Users->Add user** option from the menu and then fill in this form:

- Surname (mandatory);
- *First name*;
- *Login* (mandatory) – the value in this field must be unique;
- *Password (mandatory)* - a sequence of letters and numbers (in the ITCube system the password is case-sensitive). Together with a login name, the password is used to identify a particular system user. Below the password, there is a password strength meter, which is a graphical representation of how secure the password is. A password is secure if it consists of at least 8 characters, including letters (A-Z and a-z), numbers (0-9) and special characters: !@#\$%^&*()_+ -=[]{};,;:./?. Whether the system will accept a password that fails to meet the password strength criteria is set up in the *itcube.ini* file. If the ITCube Active Directory module is active, the LDAP option will be displayed next to the password field. If you check this field, the database of an external Active Directory will be used (its address is defined in the *itcube.ini* file). In such a case, it is important for the user's *Login Name* to be the same in both databases. A typical user login form in the Active Directory database is *itcube@local.domain*;

- *Approval* - checking this field will activate a mechanism to monitor the actions taken by each user. If this field is not checked (although the user has defined accepting persons in the fields below), this mechanism will be inactive;
- *Absence approver* - is the person responsible for approving/rejecting absences entered by the added user;
- *Marketing campaign approver* - is the person responsible for approving/rejecting marketing campaign entered by the added user;
- *Cost approver* - is the person responsible for approving/rejecting costs entered by the added user;
- *Purchase approver* - is the person responsible for approving/rejecting purchase documents entered by the added user. Approval is required only for purchase documents whose total value in the system-defined currency exceeds the amount given in the *Value greater than* field. For example, if zero (0) is left in this field, all purchases must be approved.
- *Offer approver* - is the person responsible for approving/rejecting offers entered by the added user. Approval is required only for offers whose total value in the system-defined currency exceeds the amount given in the *Value greater than* field or the total percentage profit margin is lower than the value entered in the *Profit margin below* field. For example, if you wish to activate the approval of offers with a value of over PLN 100,000 and you do not need the percentage profit margin parameter, enter *100,000* in the *Value greater than* field and in the *Profit margin below* field, enter *100* (the percentage profit margin must never fall below this limit).

IMPORTANT: Obviously, the user database will contain only the first names and surnames of those users who were previously added using the *Add a user* option. Therefore, it seems logical that when creating a user database, it is advisable to begin with the highest management level and to continue adding users, with the those without managerial responsibilities and those without subordinates to be added at the end.

- *Photo* - a field which allows to associate a graphic symbol which will be presented in selected places of the system in order to improve legibility (e.g. preview of user data, employee's search engine, main panel absence/acceptance list). Depending on the settings in the *itcube.ini* file, the size of the file used may be subject to size restrictions.
- *Custom color* - a field to define the color with which the user will be highlighted (e.g. drop-down lists with users, calendars, user browser, etc.). If not indicated a random color will be used.
- *Position*;
- *Department*;
- *Competence* - assigning a list of skills to a particular user. To select more than one competence, hold the *Ctrl* or *Shift* keys;
- *User group* - assigning a newly created user to user groups;

IMPORTANT: User groups make it much easier to manage authorisations to access database records. Records can easily be made available for reading/writing to all users assigned to a particular group.

- *Rights* (mandatory) - it is a list of authorisations that can be assigned to a new user in the system. By checking/unchecking selection fields, the person being added to the system can be granted the following authorisations:
 - To access the Extranet module;
 - To access the Intranet module;
 - To access the Email module;
 - To access the Fax module;
 - To access the Service module;
 - To access the Projects module;
 - To access the Forms module;
 - To access the CTI module;
 - To access the REPORTS module;
 - To access the SMS/ICAL module;
 - To edit "Closed - failure" projects;
 - To edit "Closed - success" projects;
 - To access other users' projects calendars;
 - To manage sales;
 - To manage purchases;
 - To manage sales/purchases of other users;
 - To manage invoices;
 - To manage invoice settlements;
 - To edit invoices;
 - To edit active orders/purchases;
 - To edit closed orders/purchases;
 - To edit individual discounts;
 - To edit individual item prices in a sales/purchases;
 - To manage products/services;
 - To read purchase prices of products/services;
 - To manage exchange rates;
 - To manage companies/contact persons;
 - To manage company duplicates;
 - To perform company group actions;
 - To manage marketing campaigns;
 - To manage users;
 - To manage substitutions;
 - To manage internal support;
 - To generate statistics/analyses and exports;

- To generate general exports;
- To generate project exports;
- To generate service exports;
- To generate exports of additional forms;
- To manage plans;
- To generate plans;
- To generate the manager's dashboard (trade/global);
- To generate the manager's dashboard (trade/your department);
- To generate the manager's dashboard (projects/global);
- To generate the manager's dashboard (projects/your department);
- To generate the manager's dashboard (service/global);
- To generate the manager's dashboard (service/your department);
- To manage record rights;
- To manage file documents;
- To manage other users' file documents;
- To manage other users' absences;
- To modify bygone absences;
- To delete your own absences;
- To manage other users' intranet costs;
- To manage other users' emails and letters;
- To delete your own emails and letters;
- To manage other users' faxes;
- To delete your own faxes;
- To manage new faxes;
- To manage other users' notes;
- To manage other users' tasks/calendars/kanban;
- To manage your department's users' tasks/calendars/kanban;
- To re-delegate received tasks/service tasks;
- To change the date of received tasks/service tasks;
- To change each field of received tasks/service tasks;
- To modify closed tasks;
- To manage other users' service;
- To edit closed service tasks;
- To read session history logs;
- To search the database;
- To read trade documents from the external ERP application;
- To read stock levels from the external ERP application;
- To update trade records in the external ERP application;
- To edit signed service request;
- To accept extranet service request;
- To accept extranet orders;

- To delete your own notices;
- To delete your own reservations;
- To delete your own rentals;
- To delete any records.

IMPORTANT: Special care must be taken when assigning authorisations to users. This includes, in particular, the authorisation to manage users. A user with such an authorisation is free to modify users' details, which means modifying users' authorisations. Special-risk authorisations include: Deleting any records (Any record can be deleted from the system), Managing group correspondence (A user with such an authorisation is free to send emails to all of the company's contractors and contract persons), report generation authorisations (Reports contain sensitive business information and the information contained in them can be exported to external systems). The last important authorisation is the authorisation to perform group actions. A user with such an authorisation is free to modify/delete an entire dataset of contractors with a click of the mouse.

When you have assigned *Authorisations* to a user, the user's *Default rights* to read, write and create history must be defined. The default rights will be set in each form added by the user. The system allows you to separately define default rights for records regarding various objects (companies, projects, service, tasks/notes, sales, document files and other objects).

When the user's basic details are provided, you can enter other contact and address details so that the database of employees in the system is more extensive and more practical. In the *Additional user data* you can add information such as street, town/city, postcode, region, country, telephone number, e-mail account settings for the user being added and generally any information that you think may be useful. All these details can be entered in fields with the same names. Note that these details are not obligatory, but providing them will help increase the efficiency of the system. However, please note the *Share calendars* field, which allows you to narrow down the set of user groups that will have access to the calendar of the account being configured. Additionally, the following fields must be completed if you are going to use the EMAIL module:

- *Calendar email* - address to which the system will send tasks in the form of ICalendar invitations;
- *IMAP server* - the IMAP server is the server with the IMAP email accounts for the user being added. You can specify whether the server requires SSL/TLS encryption. Additionally you can ask for leaving copies of all sent messages on the server;
- *IMAP account* - the name of the account on the above server which is owned by the user;
- *IMAP password* - is the password for access to the above email account. If the ITCube OAUTH module is active, in addition to the usual IMAP password we will also be able to select the Gmail and MSO token options here. In this case, the mechanism allowing for one-time authorization of OAUTH 2.0 in Google or Microsoft network for a given account / email address will be active. If the ITCube Active Directory module is active, the LDAP option will

be displayed next to the field. If you check this option, then every time you log in to the ITCube system, which uses Active Directory authentication, this field will be overwritten with the password that is used.

- *SMTP Server/Port* – is the name of the smtp server used to send electronic mail. You can specify whether the server should be authenticated or encrypted using the SSL/TLS protocol. Additionally, if the server uses non-standard port, the port must be set in the *Port* field. If a standard port is used, this field should be left empty.
- *SMTP account* – is the name an account on the smtp server that is used to send electronic mail.
- *SMTP password* - is the password for to the above email account. If the ITCube OAUTH module is active, in addition to the usual SMTP password we will also be able to select the Gmail and MSO token options here. In this case, the mechanism allowing for one-time authorization of OAUTH 2.0 in Google or Microsoft network for a given account / email address will be active. If the ITCube Active Directory module is active, the LDAP option will be displayed next to the field. If you check this option, then every time you log in to the ITCube system, which uses Active Directory authentication, this field will be overwritten with the password that is used.
- *Email signature* - A signature template that can be automatically inserted when drafting email correspondence.
- *Mailbox* - the section where you can assign rights *To read* and *To write* the electronic mail database of the user being added.

IMPORTANT: The ITCube system also allows you to register an inactive user. You can do this by disabling the *Active* option to the right of the *Surname* field at the top of the form. It is also an easy way to block a user's account temporarily.

To finish the process of adding a new user to the system, click on the *Save* button. If you choose not to add the new user to the system for some reasons, click on the *Cancel* button to abort the process.

Managing users

The administrator and a user with the necessary authorisations are free to review the system user database at any time. They can also make the necessary corrections to the database. To do so, use the **Users->User list** option. The system will open a *User list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). To search for users, use the **Users->User list** option. This search form consists of the following columns: Login Name, First name/Surname, Department, Competence and Groups.

IMPORTANT: You can search for records containing active, inactive or deleted users. To select a user type, check the appropriate field: *Active*, *Inactive* or *Deleted* on the left side of the *Search* button.

Viewing, modifying and deleting records

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If the *Admin* account is edited, only the *Default rights* section is displayed.

Cancelling the deletion of a user

A user that has been deleted from the system can be re-added at any time. To do so, search for a deleted user (by checking the *Deleted* option at the bottom of the user viewer) and left-click the action symbol next to the record number and select *Edit record / Cancel the deletion*. The *ITCube* system will open a separate window with an *Edit user* form. In the form, enter your login name. The deleted user will be visible in the system again.

Adding a user based on an existing user

Each record may, at any time, be used as the basis for a new user. To do so, please left-click on the action symbol next to the record number and select the *Add user*. A form will be opened where you will be able to add a new user. Most of the fields in the form will be auto-populated with values from an existing account. This function is very useful when creating accounts with similar parameters (e.g. accounts for employees in the same department).

Define worker signature

This function is used to define a graphic signature of the user. Subsequently, this signature will be used on the service request printout provided that the option "*Date and seller's signature*" is selected in the service request template.

Managing substitutions

The *ITCube* system offers a tool that allows you to re-assign duties for users of the system. This is useful in the case of long-term absences or when an employee leaves the company. The term 'duties' means objects such as Tasks in progress, projects in progress/project stages, Offers being dealt with, Service requests/tasks in progress.

To open a replacement management form, select the **Users->Substitutions** option. The first step is to define the person to be replaced and the replacement. If the absence is temporary, provide the dates in the *Substitution period* field. If you want the replacement to become the owner of the records (only the performer, operator and coordinator fields are changed by default), check the *Change the record owner too* option. This will give the replacement wider access to the

records, but the information on the original record owner will be lost. As this may make it difficult to interpret historical data in the future, this field should, as a general rule, be left unchecked.

The final step is to define the objects (*Task, Projects, Project stages, Trade documents, Service requests, Service tasks*) to be linked with the new user. You will be able to define the type of each object and the progress status. The default values for the object type and progress status describe the situation where the performer is to be changed regardless of the object type, but only for records linked with “unclosed” activities. The last step is to complete the performer change action by clicking the *Save* button.

Types of user notes (*)

The ITCube system allows you to keep a full employment history relating to a particular employee. However, before you proceed to enter new notes about system users in the system (**Users->Add user note**), it seems logical to define, within the database, a user note structure according to note content (e.g. A reprimand note, ‘coming late’ note etc.).

To manage the “Note type” dictionary, use the **Users>Dictionary->Note type** option. A detailed description of how to manage dictionaries can be found in [separate section](#).

Adding a new user note

To enter a user note, use the **Users->Add user note** option. A new *Add user note* form will be opened where you will be able to define all the parameters of the new user note. The form contains the following fields:

- *Date from/to* (mandatory) – use these fields to set the period of time covering the new user note.
- *Type* (mandatory)
- *User* (mandatory) - use this field to specify the user to whom the note relates
- *Company*
- *Contact person*
- *Project/Project phase*
- *Owner(*)*
- *Description* - the note itself

IMPORTANT: In the *Owner* field, the system administrator will be able to specify the record owner.

Managing user notes

A user with the necessary authorisations within the ITCube system may, at any time, view a particular record and, where necessary, correct it. To do it, use the **Users->User note list** option. The system will open a *User note list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). To search for notes, use the **Users->User note list** option. This search form consists of the following columns: *Owner, User, Date* and *Type*.

Viewing / Modifying / Deleting records

A description of how to view, modify and delete records can be found in a [separate section](#).

User reports - workload statistics

The first user report is *Workload statistics*. This report will tell you how many notes, tasks, offers, emails etc. are linked with particular users within the set period of time. The tabular form makes it easier to compare employees performance statistics. The workload statistics can be generated using the **Reports->Users->Workload statistics** option. The system will open a form where you will be able to define criteria for the inclusion of information in the report :

- *Date from/to* – use these fields to define the period of time to be covered by the report.
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department.

The second part of the form contains fields where you can narrow down the scope of projects to be analysed by setting criteria. The following field values are available:

- *Date from/to* – the time period of the project
- *Project owner*
- *Coordinator*
- *Template*
- *Project*
- *Project stage*

The last part of the form contains field where you can narrow down the contractor analysis to those contractors who meet certain criteria. The following parameters can be defined in this part of the form:

- *Company* – contractor name;

- *Group*
- *Industry*
- *Status*
- *Acquisition type*
- *Town/City*
- *Region*
- *Country*
- *Potential*
- *Acquisition date (from/to)*
- *Operator*
- *Owner*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

User reports - sales profit statistics

The second user report is called *Profit statistics*. This report will tell you how much loss/profit a particular user has generated. This information will be broken down by offer, order and income/costs. This report is presented in tabular form to make it easier for you to compare profitability statistics for different employees. The sales profit statistics can be generated using the **Reports->Users->Profit statistics** option. The system will open a form where you will be able to define criteria for the inclusion of information in the report:

- *Date from/to* – use these fields to define the period of time to be covered by the report.
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Currency* - use the field to narrow down the scope of the report to documents issued in a particular currency;

The second part of the form contains fields where you can narrow down the scope of projects to be analysed by setting criteria. The following field values are available:

- *Date from/to* – the time period of the project
- *Project owner*
- *Template*
- *Project*
- *Project stage*

The last part of the form contains field where you can narrow down the contractor analysis to those contractors who meet certain criteria. The following parameters can be defined in this part of the form:

- *Contractor* – contractor name.
- *Group*
- *Industry*
- *Status*
- *Acquisition type*
- *Town/City*
- *Region*
- *Country*
- *Potential*
- *Acquisition date (from/to)*
- *Operator*
- *Owner*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

Delegating and performing tasks

The ITCube system offers many functions that facilitate group work within the company. The main group work tool is the task management tool. Tasks can be added, delegated or viewed in the **Tasks** menu.

Types of tasks (*)

Before you can add or delegate tasks, you need to set up dictionary values for tasks. The *Task types (Tasks->Dictionary->Task type)* form allows you to enter different types of tasks in the ITCube system and use them later to delegate tasks to other users. The different types of tasks can be linked with graphic symbols to emphasise their importance and meaning. Additionally for each type of task we can define a default duration, which significantly improves the quality of reports analyzing the employees' working time.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The Task types dictionary is used not only when adding a task, but also in calendars, search engines and to export contractors or contact persons information.

Progress of tasks (*)

Another important dictionary related to tasks is description of its progress. The *Task progress* form (**Tasks->Dictionaries->Task progress**) allows you to enter phases into the ITCube system, into which you can divide the completion of a task with the status Accepted. As the entered phases describe the progress of the task, their order is important, which is determined by the value of the Serial Number field.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The *Task progress* dictionary is used not only when adding a task but is also the basic information based on which the KANBAN table is generated.

Days off work (*)

The *Day off work* form (**Tasks->Dictionary->Day off work**) can be used to enter a set of bank holiday dates. Such dates will be marked in red in all system calendars (including those not related directly to tasks).

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The ITCube system allows you to enter bank holiday dates in two ways. One is to enter the full date, i.e. the year, month and day, e.g. 2018-01-01. To enter only the month and day, e.g. 12-24. In the latter case, this is the date repeated annually.

IMPORTANT: The *Days off work* dictionary does not allow you to select a default value.

Delegating and performing tasks

The ITCube system allows you not only to send information to particular user groups. You can also use it to assign a task to a particular user registered in the system and to supervise the performance of the task. Additionally, which is very important, you can use the system to exchange comments and suggestions.

For a good understanding of how tasks are delegated in the system, you need to look at how tasks move between users and how users can use them. To put it briefly, the process is as follows:

1. A user delegates a task to another user. As a result, the delegating user will have the role of assessing the performance of the task and deciding whether the task has been completed successfully or otherwise.

2. The user to whom a task was delegated will be informed of it by the system (in the *To do* -> *New tasks* section in the *Main panel* of the ITCube system and information available by using the **Tasks->Received task list**) option.
3. The performer will decide on what to do and inform the delegating person by setting an appropriate task status in the *Status* field and by stating the reasons for the decision.
4. The delegating user will view information entered by the performer using the **Tasks->Delegated task list** option and either accepts the performer's decisions or orders the performer to deal with the task again, giving their reasons in the edition field.

IMPORTANT: A user may assign themselves to be the performer of a task. In this way, the ITCube system can also serve as a private calendar.

To delegate a task to another system user, select the **Tasks->Add/Delegate task** option. The ITCube system will open a new window with a form containing the following fields:

- *Subject* (mandatory) - use this field to give a name to the task you are creating. This field is very important and it will be used when the task is displayed on the main desktop, in calendars, in reminders and a history of other objects.
- *Type* - this is a drop-down list with the types of tasks and corresponding icons you can enter in the system using the **Tasks->Dictionary->Task type** option;
- *Date* (mandatory) - use this field to define the start and completion dates (and completion time) of the task. To enter the dates, use the system calendar, which can be accessed by clicking on the button to the right of the *Date* field. Using calendar has additional advantage, that it presents in graphical way workload (small, medium, big) of logged user for particular days in context of chosen task type. Default task duration is calculated based on the type of task. If the task you are adding is spread over a number of days, modify the completion date manually;
- *Series/To* - use these fields to enter series, i.e. tasks repeated periodically. Here you can also assign a task to many users, if you select the *Multiuser* value in the first field. The Performer field will be changed to display multiple values. If you select a periodic series, the frequency of repeating the task (daily, weekly, monthly etc.) will be defined in this field. If you select the daily basis, the system will also allow you to specify the days of the week. The "To" field contains the completion date of the series period;
- *Performer* (mandatory) - use this drop-down menu to select a registered system user to be the person responsible for the task being created. The *Department* drop-down list additionally allows you to narrow the list of users to those working in the selected department which is useful if you have a large number of employees;
- *Delegator*(*) - this field allows the administrator to change the person delegating the record being edited;
- *Priority* - this is a drop-down menu where you can give a level of priority to the task being delegated;

- *Delegator reminder* - this is a drop-down list that allows you to decide whether the system will inform the delegating person of the completion of the delegated task. Additionally, the delegating person can be notified of delay in the completion of the task or of the acceptance of the task by the performer. If you want the system to notify the delegating person of the completion or acceptance of the delegated task, select the *Task closed/accepted* option. Task acceptance is defined as the performer's decision to accept or reject the task. If you want the system to notify the delegating person of delay in the completion or of the completion of the delegated task, select the *Task closed/delayed* option. Task completion delay is defined as no decision whether to close the delegated task when the deadline for its completion has expired. In both cases, task closing is defined as the decision to set the task status as either *Closed-success* or *Closed-failure*. If the ITCube system notifies the delegating person of the completion or delay in the completion of the delegated task, you can select the *Disable reminding* option, in which case the system will no longer send such notifications;
- *Performer reminder* - this is a drop-down list where you can decide when the system is to notify the person responsible for performing a task. If you want the performer to be notified by email in addition to the standard notification method, select the *Email* option. If the ITCube SMS/ICAL module is active, you can instruct the system to send a text message to the performer to remind them of the task to be performed or to send a task as an email with an iCalendar invitation. Such an email can be imported automatically into the calendar of your mobile device that supports this format;
- *Delegator note* - use this field to enter, for example, an instruction for the performer of a task;
- *Status* - use this drop-down menu to check the current status of a task. There are five options to choose from:
 - *New* - a task that has only just been entered in the system.
 - *Rejected* - a task not accepted for performance
 - *Accepted* - a task accepted for performance
 - *Closed-success, Closed-failure* - a task that has been closed as either a success or a failure;
- *Progress* - a drop-down menu which is visible only if the *Status* field contains the value *Accepted*. It provides an opportunity to select the stages of task progress entered into the system using the **Tasks->Dictionaries->Task progress**
- *Company, Contact* - this allows you to **link the form with a contractor and a contact person**;
- *Project, Project stage* - this allows you to **link the form with a project and a project stage**;
- *Sale/Purchase* - this drop-down menu can be used to link a task with a sales or purchase document;
- *Inbox* - this drop-down menu can be used to link a task with a mail from an inbox;
- *Files* - this field allows you to link any files with a particular task. This is described in a **separate section**;
- *Performer note* - use this field to describe the work done by the performer.

- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

In the *Add/Delegate task* form, you can fill in additional fields defined during the implementation of the system. You can only view this section if the field addition mechanism is enabled in the *itcube.ini* file.

IMPORTANT: When adding/delegating a task, you can smoothly switch to adding new objects: notes, resource reservations, sales documents, projects, absences. For example, if you have added a task and want to go directly to the form where you define notes (where most fields will be auto-populated), check the *Add note* field at the bottom of the form.

IMPORTANT: At the bottom of the form, there is *Update project/stage "Connected to" filed* option. By checking this option, the contractor linked with a particular task will be added to the list of contractors linked with a project. If the contractor is already entered in the list of contractors linked with that project, that contractor will be ignored.

IMPORTANT: At the bottom of the form, there are two more fields you can use to save a task in the ITCube database despite a possible conflict with other tasks or absences. The fields are: *Ignore task collision* and *Ignore absence collision*.

For a record to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. If you click on the *Cancel* button, the system will reject all the information you have entered about a particular task.

Monthly calendar

The ITCube system allows you to view tasks easily for a particular month. In this way you can check on which day you have many things to do and when you have relatively little work to do. To check such information, use the **Tasks->Monthly calendar** option. The system will open a *Monthly calendar* window with a table showing your tasks for different days. Each cell in the table represents one day (the day number is given in the left top corner), and all the tasks set for that day are shown in that cell. In the calendar, you can view all tasks or important/very important tasks, depending on the system settings. In the case of one-day tasks, the timeframe for the performance of the task will be shown next to the name of the task. However, in the case of tasks spread over a number of days, the details shown include the start time of the task (on the first day of its performance). The days between the start date and the completion date are marked with *dots*.

The *Monthly calendar* also allows you to add tasks quickly. To delegate a task, click on the action button next to the number of the day on which you wish to delegate the task. The next step is to define the hours during which the task is to be completed and click on the *Add task* button. The

system will open a new window identical with the one opened when you select the **Tasks->Add/Delegate task** option. The action button also allows you to add absences quickly.

If a user has the *Other users calendars management (department)* authorisation, then two additional fields will appear at the bottom of the *Monthly calendar*. The two fields are *Performer/Absent* and *Delegator*. These fields allow you to view and delegate tasks to other ITCube system users. If the user also has the *Other users calendars management (all)* authorisation, then a third additional field (*Department*) will appear. You can use it to narrow down records to those for the employees of the selected department.

If you want the *Monthly calendar* to include also system users' absences or service tasks, check the *Absence* or *Service tasks* fields, respectively, at the bottom of the form.

The monthly calendar also offers the possibility to change the date of objects using Drag&Drop technology (on browsers and operating systems that support this technology)

Weekly calendar

The ITCube system allows you to view tasks graphically for a particular week. In this way you can check on which day you have many things to do and when you have relatively little work to do. To check such information, use the **Tasks->Weekly calendar** option. The system will then open a *Weekly calendar* window with a table showing your tasks for different days.

The *Weekly calendar* also allows you to add tasks quickly. To delegate a task, click on the action button next to the number of the hour on which you wish to delegate the task. The next step is to define the hour by which the task is to be completed and click on the *Add task* button. The system will open a new window identical with the one opened when you select the **Tasks->Add/Delegate task** option. The action button also allows you to add absences quickly.

As in the case of the monthly calendar, a user with the required authorisations can view tasks by *Performer/Absent* and *Department*, and can view absences and service tasks.

The calendar functionality also allows you manage task performance time, using the drag and drop technology. This means that you do not need to open an edition window to modify the duration of a particular object. To change the start time for an object, move the cursor onto the left edge of the symbol representing the object, click the right button of the mouse and drag the edge to the required position. In the left column of the calendar, the current date is displayed all the time. When you release the right button of the mouse, the new time will be saved. To change the completion time, follow the same steps, except that you operate on the right edge of the symbol representing the object. By operating on the middle part of the symbol, you can change both the start time and the completion time. To modify the date, you can use the option that

allows you to move the object by a set number of days forwards or backwards. To do so, operate on the bottom or top edge of the symbol representing the object.

IMPORTANT: The functionality that allows you to manage task performance time using the drag and drop technology is not available for multi-day tasks.

Daily task calendar

The ITCube system allows you to view tasks graphically for a particular day. In this way you can check instantly at the which times on a particular day you have many things to do and at which you have relatively little work to do. To check such information, use the weekly or monthly calendar and select a particular day. The system will then open a *Daily calendar* window with a graphical presentation of the tasks for the selected day, divided into hour units.

The *Daily calendar* also allows you to add tasks quickly. For a description of this option, please refer to the previous section (the monthly and weekly calendars).

As in the case of the monthly/weekly calendars, a user with the required authorisations can view tasks by *Performer/Absent* and *Department*, and can view absences and service tasks.

The calendar functionality also allows you to manage task performance time, using the drag and drop technology. This, too, is described in the previous section.

IMPORTANT: The functionality that allows you to manage task performance time using the drag and drop technology is not available for multi-day tasks.

KANBAN table

Calendars are a convenient tool for planning and organizing events over time. However, they are not ideal for managing processes that have a specific end date and the main focus is on monitoring work progress and timely completion. In such a case, a more useful approach is to use a KANBAN table, which allows you to organize tasks in columns. The columns correspond to task statuses and additionally contain information about the total number of tasks. The Accepted status is further broken down into progress phases defined in the system, e.g. "In progress", "To be checked" or "Completed". Moving a task between columns is possible by editing it or using "Drag and Drop" technology - which allows easy and convenient management of the progress of all tasks that need to be completed on time.

Managing received tasks

All tasks assigned to a particular user are immediately recorded in a special table containing a list of the tasks received. You can view the table by selecting the **Tasks->Received task list** option from the system menu.

Data search

When you select the **Tasks->Received task list** option, the system will produce a list of all the tasks assigned to the person that is logged in to a particular workstation.

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). You can search for data in the following columns: *Delegator, Performer, Date from, Date to, Type, Company* and by the *Additional* column, which contains practically all the fields from the task form.

Additionally, at the bottom there are buttons for the status and priority of the task. You can choose from the following statuses: *All, New, Rejected, Accepted, Closed-success, Closed-failure*. The priority values are as follows: *All, Low, Medium, High*.

Viewing and modifying received tasks

A description of how to view and modify records can be found in a [separate section](#).

IMPORTANT: Please note that, as a rule, the performer cannot change all of the fields if the performer is not the person who delegated the task. In particular, such a performer cannot change the *Date* and *Performer* fields. The performer will only be able to make such changes with the following authorisations: *"Received tasks/service tasks redelegation"* or *"Received tasks/service tasks date change"* or *"Received tasks/service tasks full edit"*.

Exporting tasks to iCal format

If the SMS/ICAL module is on, the context menu for each task contains the Export to iCal option. Calling this option allows you to download the task in a format that is accepted by most mobile devices. As a result, the task can be automatically recorded in the internal calendar of the mobile device.

Deleting tasks (*)

To delete a record, left-click on the action button next to the record number and select the *Delete record* option. The *ITCube* system will ask you to confirm your decision to delete the particular record. If you confirm your decision (by clicking the *Yes* button in the selection window), the record will be removed from the database. If the task is part of a series, which means it was generated automatically as part of a cyclic task, an additional options *Delete series (all tasks)* and *Delete series (unclosed tasks)* appears. The first of these two options allows you to delete all the

records relating to a particular cyclic task. The other option allows you to delete only records not marked as *Closed*.

Managing delegated tasks

As in the case of received tasks, you can, at any time, view a table with all the tasks assigned to a particular user. You can view the table by selecting the **Tasks->Delegated task list** option from the system menu.

Data search

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). You can search for data in the following columns: *Delegator, Performer, Date from, Date to, Type, Company* and by the *Additional* column, which contains practically all the fields from the task form.

Additionally, at the bottom there are buttons for the status and priority of the task. You can choose from the following statuses: *All, New, Rejected, Accepted, Closed-success, Closed-failure*. The priority values are as follows: *All, Low, Medium, High*.

Viewing and modifying delegated tasks

A description of how to view, modify and delete records can be found in a [separate section](#).

Activity plans

The ITCube system allows you to define and analyse activity plans. In very brief terms, defining a task plan means defining a time period and the quantity targets that individual employees (or a whole team) are expected to achieve within that time period. Depending on the authorisations, the task plan analysis means checking tasks plans to be achieved by other employees or viewing only your own plans.

To create or modify a task plan, use the **Tasks->Activity plans->Add/Edit activity plans**. The system will open a form with two sections. In the *Add/edit activity plan* section, you will be able to add a new plan or modify an existing plan. If you want to add a new activity plan, then in the *Activity plan* field, leave the default value, i.e. *Add new activity plan*. Otherwise, use the drop-down list to select an existing plan you wish to modify. By default, this drop-down list shows only active plans. If you wish the list to include all the plans whenever added to the database, check the *Include inactive*.

The second section contains details of the activity plan to be added/edited. It contains the following fields:

- *Subject* (mandatory)
- *Date* (mandatory) - use this field to enter the time period for the activity plan.

- *Active/Inactive* - use this field to decide whether you wish the plan to be visible in activity plan analysis tools or not. As a general rule, all plans relating to a present activity should be set as active plans, and those relating to past activities should be set as inactive. As a result, the analysis reports will not include those task plans that you no longer want to be analysed.
- *Reporting* - this is a multiple-choice field containing the user groups that can display plan analysis reports;
- *Company/Group* - use this field to narrow down the analysis to the records for a particular contractor or particular contractors from the selected group;
- *Limit type* - use this field to decide whether the analysis should include events recorded as tasks or notes. Additionally, you can select a particular type of task or note.
- *User/Limit* - this is a list of fields where you can set a limit for each user. The limit is the number of records linked with a particular user. Importantly, you do not need to set such limits for all your employees. Each task plan will only apply to those employees who are checked in the first column.
- *Global limit* - this is the limit for all the employees with limits set. This global limit does not have to add up to the sum of the individual limits. However, if this is the case, you can use the icon next to that field. If you click on the icon, the field will show the sum of all the individual limits.

When all the fields have been completed, save the changes by clicking on the *Save* button. Once the new plan has been added, you will be able to use plan progress analysis tools. Two basic tools are available. One is used to analyse plans globally, i.e. for all employees. The other tool can only be used by a user currently logged in to the system and only to track their plan delivery progress.

The results of the global analyses will be presented in a report you can generate by selecting the **Tasks->Activity plans->Report activity plans** option. This tool is available only to users with the authorisation to *Plans reporting*. When you select this option, you will have to decide which of the active plans is to be analysed. Importantly, you will be able to select only those plans in respect of which you have the authorisation to generate. When you have selected a plan, you will receive a report with delivery progress information for that plan and for all the users engaged in its delivery.

The plan reporting mechanism can be activated by selecting the **Tasks->Task plans** main menu or, as an alternative, in the contractor's context menu. In this case, the available plans will be narrowed down to those with a particular company named in the *Company* field.

For a private analysis, use the report available on the user's main desktop in the *Dashboard->Reports->Private activity plans* section. When you have selected this option, a particular employee will be able to view his own delivery progress information regarding the plans linked with them. Importantly, the employee will be able to view only those plans in respect of which they have the authorisation to generate.

Task statistics

The ITCube system offers mechanisms for detailed analyses of the time spent on dealing with contractors. You can choose between an analysis of any customer service type that was defined using the **Tasks->Dictionary->Task type** option. To generate statistics/rankings of the time spent on dealing with the selected contractors or groups of contractors, use the **Reports->Tasks->Task ranking** and **Reports->Tasks->Task statistics** options.

IMPORTANT: The ITCube system is designed to perform statistical calculations based on various data combinations. The data to be included in such statistics are selected in individual fields. If you select or enter any value in any field, the system will treat that value as important and include it in the statistics. However, if a field is left empty, it will be ignored by the statistics generation mechanisms.

When you have selected the **Reports->Tasks->Task statistics** option, the system will open a form where you will be able to compare the time spent on the performance of the tasks of a specific type for a defined group of contractors. *Task statistics* will be presented in tabular form.

The *Task statistics* form contains three windows. The first allows you to define the parameters of the tasks being analysed. The following fields can be found in this form:

- *Date from/to* – the time period of the analysis;
- *Delegator* - use this field to narrow down the analysis to the user that delegated the tasks;
- *Performer* - use this field to narrow down the analysis to the user that performed the tasks;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Type (mandatory)* - use this menu to select task types to be included in a comparative analysis.
- *Status* - use this field to narrow down the analysis to a particular task status;

The second part of the form contains fields where you can narrow down the scope of projects to be analysed by setting criteria. The following field values are available:

- *Date from/to* – the time period of the project
- *Owner*
- *Coordinator*
- *Template*
- *Project*
- *Project stage*

The last part of the form contains field where you can narrow down the analysis to those contractors who meet certain criteria. The following parameters can be defined in this part of the form:

- *Company*
- *Group*
- *Industry*
- *Status*
- *Acquisition type*
- *Town/City*
- *Region*
- *Country*
- *Potential*
- *Acquisition date*
- *Operator*
- *Owner*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

Task rankings

Another statistical tool available in the ITCube system that can be used for analyses of the time spent on dealing with contractors is the *Task ranking*. It can be used to compare contractor groups in terms of the amount of time spent on dealing with them.

As in the case of the task statistics tool, the *Task ranking* form contains three windows. The first one contains the following fields:

- *Date from/to* – the time period of the analysis;
- *Delegator* - use this field to narrow down the analysis to the user that delegated the tasks;
- *Performer* - use this field to narrow down the analysis to the user that performed the tasks;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department.
- *Type* - use this field to narrow down the analysis to a particular task type;
- *Status* - use this field to narrow down the analysis to a particular task status;
- *Sort (mandatory)* - use this drop-down menu do select how the statistics in tabular form are to be presented. There are two sorting options available: *Descending order* or *Ascending order*.

- *Result limit (mandatory)* - use this drop-down menu to define the number of results records to be displayed in the statistics table.

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the tasks are linked. The following fields can be found in this part of the form:

- *Date from/to*
- *Owner*
- *Coordinator*
- *Template*
- *Project*
- *Project stage*

The last part of the form contains field where you can define grouping criteria. The following parameters can be defined in this part of the form:

- *Company*
- *Group*
- *Industry*
- *Status*
- *Acquisition date*
- *Town/City*
- *Region*
- *Country*
- *Potential*
- *Acquisition date*
- *Operator*
- *Owner*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*. The system will display a table where you can compare different contractor groups in terms of the time spent on dealing with them. To make this comparison even easier, all the records will be arranged in the table according to *Duration* column. The system will also use a darker colour to mark those records that meet the criteria set in the *Grouping criteria* window.

File documents

When using the ITCube system, you will be able to attach different files to newly created records. For example, when you record a new product or service in the system, you may want to attach a graphic file or a file with technical documentation. This functionality is all the more important because it makes the system itself more helpful and a resource of complete and diverse information. You can also use this functionality to build a central resource of your company's documents to make graphic files or draft contracts easily available to all your personnel. Note that the ITCube system also allows you to manage shortcuts of documents physically kept outside the system's database (on a file server, an FTP server or a website).

Tasks, notes and sent correspondence can also be linked with documents. Therefore, a document is similar to a contractor or a project in the sense that it has its own history, i.e. a record of the actions taken in relation to the document.

However, to be able to attach files to records, the files must be first be registered in the system. All the necessary options can be found in the **Files** menu. In this way, a user with the authorisation to add documents in the system (the *Files management* was enabled when the user's account was created) can

- register a new document in the system,
- register a new shortcut of a document in the system,
- view documents already registered in the system,
- update documents registered in the system.

Document directories (*)

Before you can add documents to the system, it seems advisable to set up folders structure for files so that they are easier to find when needed.

Adding / modifying / deleting document directories

Document directories can be managed by using the **Files->Document folders** option. When you select this option, a form will be opened where you will be able:

- to add a new folder by entering its name in the *Name* field, assigning the authorisations to *Read* and *Write* documents into the folder, indicating the suggested maximum dimensions of image files, and defining whether the files which are in the directory can be used as graphics when sending an e-mail. Above fields can be found in the *Add document folder* window. When you have selected the necessary options, confirm your choice by clicking on the *Add* button;
- to change the name and access authorisations for an existing folder, by selecting the name of the folder to be modified from the drop-down menu in the *Delete/Modify document folder*. The selected name will appear in the *New name* field, where you will be able to change it. You can also change the authorisations to save/write the selected folder, the

suggested maximum dimensions of image files and define whether the files which are in the directory can be used as graphics when sending an e-mail. The change will be saved in the system only if you confirm it using the *Save* button;

- to delete an existing document folder by selecting the name of the folder to be deleted from the drop-down menu in the *Name* field and confirming your choice by clicking on the *Delete*.

IMPORTANT: Remember that when you delete a folder, all the files in that folder will also be deleted.

IMPORTANT: In addition to the folder set up by users, the system has the *Main Folder*, which contains documents not saved in any other folder. This folder cannot be deleted.

Adding a new document

To add new documents to the system, use the **Files->Add document** option. The document registration process is divided into two stages. At stage one, you will be asked to enter the access path for the files to be uploaded. To select files, click on the *Search* button in the *Path* field. For browsers that support *Drag and Drop* technology for file fields (Chrome and Firefox), you can also drop files within the *Drag and Drop files to be registered* field. In both cases, the maximum number of simultaneously registered files may not exceed 10. Additionally, the system will allow us to perform optimization operations on graphic files in BMP, PNG and JPG-RGB format (other file formats are not modified). To adjust the dimensions to the recommended values, select the appropriate value in the *Scale graphic* field. The drop-down list contains the recommended maximum dimensions of the graphics for the product icon, contact person/employee image and company logo. Additionally, it also contains a list of all document directories for which the preferred sizes have been defined. This option is worth using as it often allows you to reduce the size of the binary file several times while maintaining sufficient quality for the ITCube system.

To confirm your choice, click on *Next*. You will then go to stage two. If you click on *Cancel*, you will be taken to the *Main Panel* of the ITCube system, which means that the selected document will not be registered in the system. At stage two of the document registration process, you will be asked to fill in a form with details of the documents you wish to import. The following fields must be completed:

- *Name* (mandatory) – name of the document. The default name is the original name of the file;
- *Type* - this is the file extension, telling the system which application to use to open the file. The default extension is the original extension of the file;
- *Number* - this unique field will be completed automatically by the system, using the format set in the itcube.ini file (the standard form is YYYY/MM/RR);

IMPORTANT: If you register more than one file, the *Name*, *Type* and *Number* fields will be duplicated and marked with the corresponding ordinal number.

- *Folder* (mandatory)
- *Operator*
- *Extranet* - use this checkbox to decide whether a particular file will be visible in the Extranet module (this checkbox will be displayed if the licence covers the Extranet module);

IMPORTANT: Files checked using the *Extranet* button will be available only to contractor groups selected from the list opposite or for the contractor named in the *Company* field.

- *Company, Contact* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Owner(*)*
- *Note*
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

If all the necessary fields have been completed, confirm your decision to register the document in the system by clicking on the *Save* button. Otherwise, the document will not be displayed in the system. Additionally, immediately before saving the document, you can check the options to add a note or a task. If you check one of these options, the document will be saved and you will be automatically taken to the process of adding these objects. All the objects added at this stage will be displayed in the history of the document.

Adding a new shortcut

To add a new shortcut for a document not registered in the database of the system, use the **Files->Add shortcut** option. Then complete the following fields:

- *Name* (mandatory)
- *Type*
- *Folder* (mandatory)
- *Number* - this unique field will be completed automatically by the system, using the format set in the itcube.ini file (the standard form is YYYY/MM/RR);
- *Path* - use this field to enter the complete file path for the resource. Examples of correct entries include: <http://company.com/image.jpg> and <ftp://server.com/document.doc>, <\\LocalServer\Docs\File.txt>. If a correct access path (URI) is entered in this field, then in the view mode, it will serve as active link for quick access to the resource. If your Internet browser allows you to get a file path using a dialogue window, a button will be displayed next to the edition field. Click on that button to open a window where you can search for local resources. However, some Internet browsers do not offer this option for security reasons.

- *Operator*
- *Company, Contact* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Owner(*)*
- *Note*
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

If all the necessary fields have been completed, confirm your decision to register the document in the system by clicking on the *Save* button. Otherwise, the document will not be displayed in the system. Additionally, immediately before saving the short name, you can check the options to add a note or a task. If you check one of these options, the document will be saved and you will be automatically taken to the process of adding these objects. All the objects added at this stage will be displayed in the history of the document shortcut.

Managing documents and shortcuts

A user with the necessary authorisations within the ITCube system in respect of a record may, at any time, view a particular document or shortcut and, where necessary, correct it. To do it, use the **Files->Document/Shortcut list** option. The system will open a form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). You can search for documents and shortcuts in the following columns: *Owner, Operator, Registration date, Folder, Name, Company* and by the *Additional* column, which contains practically all the fields from the document/shortcut form.

Additionally, at the bottom of the form, there are buttons you can use to narrow down the search only to shortcuts or only to documents, or to instruct the browser to display both documents and their shortcuts (the *All* option). You can also search for data using the *Type* field.

Options available in the context menu for documents/shortcuts

In the first column on the left (*No.*), in the search engine for documents and shortcuts, there is an action button you can click on for the system to display a handy menu with options such as showing file content, editing the data attached to documents in the registration process, updating documents, deleting files from the system and bookmarking files in the *Main Panel* of the *ITCube system*.

Displaying, viewing and modifying files

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If you select the *View record* option, a description of a document or shortcut will

appear. To see the content of the file, in new window, click on the name link or the symbol of magnifying glass. In the first case, the browser will propose to download the file while in the second case to open it directly in the browser (if the file format allows it).

IMPORTANT: When displaying file content, the ITCube will use applications installed on the computer used by the user logged in to the system. For example, to view the content of a MS Excel spreadsheet, you need the right software to open such a file installed on your computer. If no such software is installed, the document will be saved on the computer's local disk in a location specified by the user.

IMPORTANT: In the document viewing mode, note the *New/Previous versions* sections, where you find links to the newer or older versions of the file. Below, in the *File history* section, you can find links to the notes, tasks, emails sent and additional forms where the registered file has been used.

Updating a file

Each file registered in the system can be updated. To do so, please left-click the action symbol next to the record number and select the *Update document* option. The ITCube system will open a separate window with a form identical to that you were asked to fill in at stage one of the process of registering the document in the system (**Files->Add document**). When you have selected a file from the disk and clicked on *Next*, the file will be updated, but no information describing the record will be changed. All the previous or newer versions of the document will always be available from the document form in the *Previous versions* and *New versions* sections.

Adding tasks/notes

The system allows you to record a note or a task as connected to a particular document / shortcut. The task/note will then be displayed in its history section. To link a task or a note with a document for such a purpose, select the *Add/Delegate task* or *Add note* options.

Adding correspondence

The system allows you to send a document as an attachment or enclosure in correspondence. The email/letter will then be displayed in its history section. To link an email/letter with a document for such a purpose, select the *Send email* or *Send letter* options.

Faxing documents

If the fax module is enabled and the format of the document to be faxed is supported by the Email2Fax server (e.g. PDF or JPG), you will be able to send the document by fax. For more information on faxing documents, please refer to the FAX module section.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

Bookmarking files

Any file may be bookmarked at any time, i.e. recorded in a dedicated area of the *Main Panel* of the *ITCube* system. As a result, your most important files will be displayed in a visible place and made easily available. To do so, please left-click on the action symbol next to the record number and select the *Add to bookmarks*.

Deleting bookmarks

To delete a bookmark, click on the action symbol to the right of the file name (in the *Main Panel* of the system), select the *Delete bookmark* option and confirm your choice.

Contractors and contact persons

When you have finished entering the details of the system users and the company's infrastructure, the next important step is to enter details of your company's contractors in the database of the *ITCube* system. All the related options can be found in the **Companies** menu. You can use the options available in that menu:

- to add a new contractor (**Companies->Add company**) or a contact person (**Companies->Add contact**);
- to create a list of contact persons for each contractor;
- to view, modify or modify records (**Companies->Company list** , **Companies->Contact list**);
- to bookmark the most important records in the *Main Panel* of the *ITCube* system;
- to define dictionaries for contractors/contact persons.

Contractor industries (*)

Before you proceed to enter new contractors in the system, it seems logical to define contractor industries. The **Companies->Dictionary->Company industry** option allows you to enter, in the *ITCube* system, the names of all the industries represented by your contractors. This information will then be used to create a record for each contractor to assign the contractor to a particular industry. This will be important for reporting purposes.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Contractor groups (*)

Before you proceed to enter new contractors in the system, it seems reasonable to define contractor groups. The **Companies->Dictionary->Company group** option allows you to enter, in the ITCube system, contractor groups or categories (e.g. key customers, regular customers, suppliers, competitors etc.). This information will then be used to create a record for each contractor to assign the contractor to a particular group. This will be important for reporting purposes. Searching for contractors by contractor group will help you find them. In addition, you will be able to make documents available to contractor groups and to send information to particular contractor groups, using the *Extranet* module or through an email campaign.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Contractor/Contact person statuses (*)

Before you proceed to enter new contractors or contact persons in the system, you will need to define a *Statuses* dictionary. To do so, use the **Companies->Dictionary->Company/Contact Status** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Potential Levels (*)

The **Companies->Dictionary->Company potential**, option allows you to manage the *Potential Levels* dictionary, which is used in both contractor records and contact person records.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Contractor/Contact person features (*)

The **Companies->Dictionary->Company/Contact feature** option allows you to categorise contractors/contact persons according to any criteria (e.g. competence, financial capacity, marketing). The *Features* field is displayed as checkboxes, which means you can check the features valid for a particular contractor or contact person. The features can also be grouped into sections. The groups will be presented graphically in both contractor records and contact person records. There is no default value in this dictionary.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Acquisition types (*)

Before you proceed to enter new contractors or contact persons in the system, you will need to define an *Acquisition type* dictionary which describes how they were acquired. To do so, use the

Companies->Dictionary->Company/Contact acquisition type option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Communication types (*)

The **Companies->Dictionary->Contact communication type** option allows you to manage the available channels of communications with your contact persons.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Contractor<->Contractor relations (*)

The **Companies->Dictionary->Company relation** option allows you to define contractor relations (e.g. cooperating contractor, subcontractor, group of companies).

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Contractor<->Contact person relations (*)

The **Companies->Dictionary->Contact relation** option allows you to define contractor contact person relations (e.g. former employee, shareholder).

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Countries (*)

The ITCube system has a pre-defined database of countries. The **Companies->Dictionary->Company/Contact country** option allows you to manage the system's country dictionary. In this dictionary, in addition to the country name, you can enter the country code and the translation of the name to be used in the printouts.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Regions (*)

The ITCube system has a pre-defined database of regions. The **Companies->Dictionary->Company/Contact region** option allows you to manage the system's region dictionary.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Name declensions (*)

The ITCube system has a pre-defined database of name declensions. The **Companies->Dictionary->Name declension** option allows you to manage name declension dictionary.

A detailed description of how to manage dictionaries can be found in a [separate section](#).


Geographic locations (*)

If you wish to use the route planning functionality available in the system, you will need to define geographic locations as starting locations (these will normally be your company's locations). To do use, use the **Companies->Dictionary->Geographic location** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Adding a new contractor

The *Add company* (**Companies->Add company**) form allows you to add your company's new contractors to the database of the system. To register a new contractor, you will need to provide the address information about the contractor, including details of the contractor's legal status, as well as additional information. To add a new contractor, select the **Companies->Add company** option. Complete all the required fields in the form, i.e.:

- *Name* (mandatory) – the full name of the contractor;
- *Short* - the short name of the contractor;
- The *Active* button to the right of the *Name* field, which you can use to set the newly created record as either an active record in the system (the button is checked) or an inactive/archival record (the button is not checked);
- *Headquarters* - use this drop-down menu to pick the head office for that contractor. If you press the button , a new window will be displayed with tables showing the contractors already entered in the system. You can select the head office by left-clicking the name of the location you wish to be the head office for the contractor you are entering in the system.
- *Status* - use this drop-down menu to set the status of each contractor. To define a contractor status, click on the **Companies->Dictionary->Company/Contact status** option.
- *Operator* – use this drop-down menu to select a member of your company's personnel to be responsible for communication with the contractor you are adding to the system;
- *Phone 1, Phone 2, Fax, WWW* - use these fields to add new contact and address information;
- *Email* - this field contains a list of email addresses, each separated by a comma. The email sending module in the ITCube system uses only the first email address. Therefore, the main email address should be the first address in the list. The email receiving module of the ITCube uses all the addresses to identify the incoming emails. In this way, an email received from an address entered in the E-mail field will automatically be linked with the correct contractor.

- *Street, City, Code, Region, Country, Coordinates* - these are standard edition fields you can use to enter your contractor's contact address information and geolocation coordinates. These fields will then generate a mailing address to be used, for example, when printing address labels. You can enter the coordinates manually or use the mechanism to automatically download them from free Open Street Maps servers. Additionally, in preview mode they allow to present the client's location on the map. The City link presents the client's location on the map of the country using Google Maps, the Street link shows the exact address on the city plan using Google Maps and the Coordinates link presents a report of companies located near the client's location using Open Street Maps.

IMPORTANT: An alternative to manually entering contact and address details is automatic retrieval of such information from the database of GUS (the Polish national statistics office). To use this functionality, use the field described as *Search GUS by VAT ID* you will find in the heading of the *Additional company details/Billing information* section. When you have entered the VAT ID and clicked on the search icon, the system will connect to the servers operated by GUS (the Polish national statistics office) and attempt to download its records for that number. The same number may be linked with many entities. The system allow you to select the entity whose details are to be entered in the billing information and the entity whose details are to be entered in the contact information fields. The billing information fields include: *Name/Short name, VAT ID, REGON (INDUSTRY ID NO.), Billing address (street, postcode, city, region, country)*. The contact information fields include: *Name/Short name, mailing address (street, postcode, city, region, country), phone, fax, email, WWW*.

IMPORTANT: If you do not use the auto-population functionality using information from the database of GUS (the Polish national statistics office), then it is advisable to complete the *Postcode* field before you complete the *City* and *Region* fields. The ITCube system comes with a database of over 20 thousand Polish postcodes. If the postcode entered is found in the database, the *City* and *Region* fields will be auto-populated.

- *Domain* - this field contains a list of the company's domain names, each separated by a comma. This field allows the email receiving module of the ITCube system to link an email with a company if the email was sent from any of the email addresses entered in the system. This also allows you to avoid having to enter a large number of email addresses in the Email field. Copying the full email address from the *email* field into the *domain* field will automatically convert the email address into a domain address;

IMPORTANT: The domain names entered in the *Domain* field can only be the domain names purchased by the company concerned. Therefore, do not enter domain names such as gmail.com, yahoo.com or onet.pl etc. in this field.

- *Acquisition date* – when the contractor was acquired on;

- *Acquisition type* - this is a drop-down menu that allows you to define how the contractor was acquired. The acquisition methods can be defined using the **Companies->Dictionary->Company/Contact acquisition type** option;
- *Industry* - this is a drop-down menu with contractor industries. You can choose from the industries previously entered in the system using the **Companies->Dictionary->Company industry** option.
- *Group* - use this drop-down menu to assign a new contractor to an appropriate group. Contractor groups can be managed by the administrator using the **Companies->Dictionary->Company group** option;
- *Potential* - this is a drop-down menu with previously defined potential levels for contractors;
- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to the records is described in more detail in a [separate section](#);

When you have completed all the fields, you can finish editing the form or proceed to enter additional contractor information in the *Additional company details/Billing information* section. This window contains the following fields to be completed:

- *Features* - this window allows you to select attributes that describe the contractor. Contractor attributes can be defined using the **Companies->Dictionary->Company/Contact feature** section. You can select more than one attribute by checking the appropriate fields.
- *Product categories* - this window allows you to define the product categories that the contractor is interested in;
- *Outgoing relations/Incoming relations* - use these fields to define the links between the record being added or edited and other contractors entered in the database. Relations can be defined using the **Companies->Dictionary->Contractor relation** option;
- *City, Code, Region, Country* - billing information;
- *Logo* - a field which allows to associate a graphic symbol which will be presented in selected places of the system in order to improve legibility (e.g. preview of company data, contractor search engine, identification of the calling party). Depending on the settings in the *itcube.ini* file, the size of the file used may be subject to size restrictions.
- *Due date/Account* - use this field to set a due date (deadline for payment) relating to a particular contractor. This information will then be used to generate sales documents. In the field next to it, enter the contractor's bank account number;
- *VAT ID, REGON (INDUSTRY ID NO.), Legal status*;
- *Price level* - use this drop-down list to define the default price for the contractor you are adding to the database. The default price will be used to generate offers/purchase orders and to place orders in the *Extranet* module.

- *Global discount* - the discount granted to the contractor by default. This discount can be combined with other discounts that may be defined in respect of a particular product. The global discount will be used to generate sales documents and to place orders in the *Extranet* module.
- *Individual discounts* - this field will be displayed only when editing or viewing the details of a contractor already entered in the database. If you click on the link above, you will be taken to a page where you will be able to set individual discounts in respect of different types of products and for the contractor you are editing. For each product type, you can set an individual discount or use the default discount defined in the product type form.

In the *Add company* form, you can fill in additional fields defined during the implementation of the system. You can only view this section if the field addition mechanism is enabled in the *itcube.ini* file.

IMPORTANT: When adding a contractor, you can also check whether the database contains an entry for a contractor with a similar name, VAT ID or email address. You can check this by clicking on the button you will find to the right of the *Name*, *Email* or *VAT ID* fields.

IMPORTANT: When adding a contractor, you can also check the *Update email links* option. If this field is checked, the ITCube system will mark all the emails exchanged with the contractor so that they can easily be tracked in the system (these emails will be linked with the contractor). E-mails are linked with a contractor using the *Email* and *Domain Name* fields.

IMPORTANT: When adding a contractor, you can check the *Register in ERP* field. As a result, the contractor being added will be registered in an external sales management system. This will apply to the following sales management systems: Comarch Erp Opt!ma, Comarch Erp XL, WF-MAG, Symfonia 2.0 or Sage ERP.

IMPORTANT: When adding a contractor, you can also choose to enter a contact person linked with the contractor or to add a note, task or project related to that contractor. To do so, check the following fields, as needed: *Add contact*, *Add note*, *Add task*, *Open project*.

When you have completed all the required fields, confirm the addition of the new contractor to the database by clicking on *Save* or cancel the process and go back to the *Main Panel of the ITCube* system by clicking on the *Cancel* button.

Managing contractors

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record or correct it. To do it,

use the **Companies->Company list** option. The system will open a *Company list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching for, viewing, editing and deleting data](#). You can search for data in the following columns: *Owner, Operator, Status, Name/Short name, Address* and by the *Additional* column, which contains practically all the fields from the contractor form.

Additionally, at the bottom of the form, there are buttons you can use to narrow down the search only to active or inactive companies. Next to the *Search* button, there are additional search criteria: *Group, Industry, Acquisition type* and *Potential*.

If the system is integrated with external applications such as: Comarch Optima, Wf-Mag, Symfonia 2.0 or SAGE ERP software, the search engine will also allow you to search for contractors registered and unregistered in the sales management system.

Options available in the context menu for context contractors

In the first column on the left (*No.*), in the contractor viewer, there is an action button you can click on for the system to display a handy menu with options such as displaying record content, editing the data in the record, deleting the record from the system, adding a contractor note, delegating a tasks, sending an email to the contractor and bookmarking the record in the *Main Panel* of the *ITCube* system.

Viewing and modifying a contractor

A description of how to view and modify contractor records can be found in a [separate section](#).

In the contractor record view mode, in addition to the information entered through the *Add company* form, the system will display information about the contact persons. Additionally, the *Company history* window contains the following contractor information: *Notes, Tasks, Emails/Faxes received, Emails/Faxes sent, Group correspondence, Sales/Purchases, Income/Costs, Projects, Guarantees/Service contracts, Files, Reservations*. You can decide whether the information in the history window should be sorted by object type, object date or object owner. In addition, there is also an edition field and a magnifying glass symbol. If you enter a phrase in the edition field and click on the magnifying glass symbol, the entire contractor history will be searched for the phrase.

Below the contract history information, there is a section describing all the documents and reservations related to that contractor. If you have purchased a licence for the INTEGRATOR module, the system will also display details of the sales documents registered in your external

sales management software (e.g. Symfonia 2.0, SAGE ERP, Comarch ERP Opt!ma, Comarch ERP XL, WF-MAG, Subiekt GT, ENOVA).

IMPORTANT: When editing a contractor record, you can update certain details of the contact persons linked with that contractor record. To do so, check the appropriate buttons next to the *Save* icon before you save the record. You can update the following details: operator, address details of contact persons and their statuses.

Adding a contact person

For each contractor, you can add a contact person. To do so, please left-click on the action symbol next to the record number and select the *Add contact* option. The ITCube system will open a form identical with the one you use to add a contact person using the **Companies->Add contact** option.

Viewing the structure

At any time, you can view the graphical structure of the company, showing the company's personnel hierarchy. To do so, please left-click on the action symbol next to the record number and select the *View structure* option.

Printing a label

At any time, you can print a sticker with details of a contractor's address. To do so, please left-click on the action symbol next to the record number and select the *Print label* option. The ITCube system will open a form where you will be able to define print settings. For more information about printing labels (stickers) for envelopes, please refer to the section with information on [printing envelopes](#).

Adding a sales document

To do so, please left-click on the action symbol next to the record number and select the *Add offer/order/invoice* option. The ITCube system will open a form identical with the one you use to add a sales document using the **Trade->Add offer/order/invoice** option.

Adding a purchase document

To add a purchase related to a particular contractor, please left-click on the action symbol and select the *Add purchase* option. The ITCube system will then open a form identical with the one you use to add a purchase using the **Trade->Add purchase** option.

Recording an income/cost

At any time, you can record a revenue item or a cost item and link it with a contractor. To do so, left-click on the action symbol next to the record number and select the *Add income/cost* option. The ITCube system will open a form identical with the one you use to add an income/cost using the **Trade->Add income/cost** option.

Adding a task

You can link a task with any contractor. To do so, please left-click on the action symbol next to the record number and select the *Add/Delegate task* option. The ITCube system will open a form identical with the one you use to delegate a task using the **Tasks->Add/Delegate task** option.

Adding a note

You can link a note with any contractor. To do so, left-click on the action symbol next to the record number and select the *Add note* option. The ITCube system will open a form identical with the one you use to add a note using the **Notes->Add note** option.

Adding a document/shortcut

You can link a document or a shortcut with any contractor. To do so, please left-click on the action symbol next to the record number and select the *Add document* or *Register shortcut* option. The ITCube system will open a form identical with the one you use to register a document using the **Files->Add document** or, in the case of shortcuts, the **Files->Add shortcut** option.

Opening a project

At any time, you can open a new project linked with a particular contractor immediately. To do so, please left-click on the action symbol next to the record number and select the *Open project* option. The ITCube system will open a form identical with the one you use to open a project using the **Projects->Open project** option.

Sending correspondence

You can send a letter, an email or a fax to any contractor. To do so, please left-click on the action symbol next to the record number and select the *Send letter* or *Send fax* or *Send email* option. The ITCube system will open a form identical with the one you use to send an email using the **Mail/Fax->Send letter** or **Mail/Fax->Send email** or **Mail/Fax->Send fax** option. Additionally, the *Contractor* and *address* fields will be auto-populated with the details of the contractor you wish to send a letter to (an email or a fax).

Adding a service contract / guarantee

At any time, you can add a new service contract/guarantee linked with a particular contractor immediately. To do so, please left-click on the action symbol next to the record number and select the *Add service contract* or *Add guarantee*. The ITCube system will open a form identical with the one you use to register a service contract using the **Service->Add contract** or **Service->Add guarantee** option.

Adding a service request

At any time, you can add a new service request linked with a particular contractor immediately. To do so, please left-click on the action symbol and select the *Add service request* option. The

ITCube system will open a form identical with the one you use to register a service request using the **Service->Add service request** option.

Adding a rental

As in the case of service requests, you can, at any time, add a new rental linked with a particular contractor immediately. To do so, please left-click on the action symbol and select the *Add rental* option. The ITCube system will open a form identical with the one you use to register a new rental using the **Service->Add rental** option.

Bookmarking records

Any record may be bookmarked at any time, i.e. placed in a dedicated area of the *Main Panel* of the *ITCube* system. As a result, your most important records, e.g. those you use frequently, will be displayed in a visible place and made easily available. To delete a bookmark, click on the action symbol to the right of the contractor name (in the *Main Panel* of the system), select the *Delete bookmark* option and confirm your choice (by clicking on *Yes* in the selection window).

Registering/Unregistering a contractor from the external software

If you have purchased the INTEGRATOR module, you can register / unregister a contractor in/from your external sales management system (i.e. Comarch Erp Opt!ma, Comarch Erp XL, WF-MAG, Symfonia 2.0 or Sage ERP). To do so, please left-click on the action symbol and click on the *Register in Erp* or *Unregister from Erp*. If you select either option, the contractor will be added to or deleted from the database.

IMPORTANT: If you have registered a contractor in your external sales management system, the change may not be displayed immediately.

IMPORTANT: These options are available only to the administrator and users with the authorisation to *Update external ERP database*.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

IMPORTANT: If you delete a contractor, all the records linked to that contractor (such as emails, tasks, sales documents, notes, projects, files, guarantees, reservations, service requests/tasks/contracts and additional forms) will be deleted too.

IMPORTANT: Deleting a contact person will not mean deleting the records linked with that person. The records linked with the contact person will continue to be linked with the contractor and displayed in the ITCube system.

Managing duplicate entries

When entering information in the contractor database, it may be the case that the same contractor is entered more than once, but with slightly different names. This is often detected when each such contractor has its own history in the system. The ITCube system allows you to detect duplicate entries in the contractor database and, if such entries are found, to delete them or to combine them. These options are available only to the administrator and users with the authorisation to *Company duplicates management*, which may be assigned in the user's record (**Users->Users**).

To use the duplicate management form, select the **Companies->Manage duplicates** option. The system will display two sections. The first allows you to combine any two contractors using a standard browser. The other section automatically displays a list of entries which are suspected to be duplicate entries. The criteria used by the system during the search for duplicate entries are set in the *Group by* field. For example, if you check the *Phone 1* option, the system will recognise, as duplicates, entries with the same or only a slightly different phone number (differences may include spaces, brackets, zeros before the number etc.). If the database search returns no duplicate entries, the system will display the *No duplicate entries found* message. However, if any duplicates are found, the system will show them in a list. This list contains sections with contractor details and all the database entries recognised as duplicate entries. For each listed record, there is a context menu that allows you to delete the entry or combine the other entries within the section. If you want the system to detect duplicate entries only in a selected group of companies, fill in the *Name* field. The system will search for duplicate entries among company names containing the characters entered in this field.

Importantly, when combining records, one of the combined records will always be treated as the priority record. The target record will contain all the contact and address details of the priority contractor, but the history and contact persons will be a sum of the history and contact persons of all the combined records.

Adding a new contact person

The term 'contact person' means a person delegated by a contractor to communicate with your company, so these are the people to be turned to if you want to contact the contractor. To build a database of your contractor's contact persons, use the *Add contact* form (**Companies->Add contact**) The contact persons entered in the database of the ITCube system will be linked with e.g. notes, tasks, emails etc. When you have selected the **Companies->Add contact** option, you will have to fill in the following fields:

- *Surname* (mandatory):
- *First name*;

- The *Active* button to the right of the *Surname/First name* field, which you can use to set the newly created record as either an active record in the system (the button is checked) or an inactive/archival record (the button is not checked);
- *Title*;
- *Position* – use this field to enter the position held by a particular contact person within the company (this field is important because it is displayed in the list of contact persons for a particular contractor);
- *Department*
- *Speciality*;
- *Company* – this allows you to link the contact person with a contractor;
- *Status* – select a status from the status dictionary.
- *Operator*;
- *Next contact/Comments/Reminder* - use this field to describe the next contact with a company's employee;

IMPORTANT: The reminder window for a contact will be displayed to the person responsible for that contact – which means its *Operator*. If the contact is not assigned to any operator, the system will display a reminder window to the record owner.

- *Phone, Mobile, Fax* - phone and fax numbers;
- *Email* - this field contains a list of email addresses for a contact person, each separated by a comma. The email sending module in the ITCube system uses only the first email address. Therefore, the main email address should be the first address in the list. The email receiving module of the ITCube uses all the addresses to identify the incoming emails. In this way, an email received from an address entered in the E-mail field will automatically be linked with the correct contractor.
- *City, Code, Region, Country* - use these fields to enter the full contact and address details of a contact person. Additionally, in the view mode, the location can be shown on a map.

IMPORTANT: It is advisable to complete the *Code* field before you complete the *City* and *Region* fields. The ITCube system comes with a database of over 20 thousand Polish postcodes. If the postcode entered is found in the database, the *City* and *Region* fields will be auto-populated.

- *VAT ID*;
- *PERSON ID*;
- *Sex*;
- *Age*;
- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to the record is described in more detail in a [separate section](#).

In the *Additional data* section, you can complete the following fields:

- *Communication* - a drop-down menu that allows you to select your preferred method of communication with the contact person. To create a communication channels, use the **Companies->Dictionary->Communication type** option;
- *Photo* - a field which allows to associate a graphic symbol which will be presented in selected places of the system in order to improve legibility (e.g. preview of contact person data, contact person search engine). Depending on the settings in the *itcube.ini* file, the size of the file used may be subject to size restrictions.
- *Acquisition date/type* - this is a drop-down menu that allows you to define how the contact person was acquired. The acquisition methods can be defined using the **Companies->Dictionary->Company/Contact acquisition type**.
- *Superior/VIP* - these drop-down menus allows you to set the level of importance of the contact person within the company concerned. In regard to *VIP* field one can choose from the following options: P (person) for a regular employee, IP (important person) for an important person VIP (very important person). The *VIP* field is taken into account when the company's structure report is displayed;
- *Link, Communicator* - use these fields to enter social media links and instant messaging (IM) numbers.
- *Login Name, Password (Extranet)* - use these fields (displayed if the *Extranet* module is enabled) to set a password and a login name to allow the contact person access to the *Extranet* and to identify the person in the system. The contact person will be able to use the account as soon as the *Active* to the right of the *Login name* field is checked;
- *Product categories*;
- *Features* - this window allows you to select attributes that describe the contact person. Contact attributes can be defined using the **Companies->Dictionary->Company/Contact feature**.
- *Outgoing relations* - use these windows to define the links between the record being added or edited and other contractors in the database. Relations can be defined using the **Companies->Dictionary->Contact Relation** option;

IMPORTANT: A contact person not assigned to a contractor will not be allowed to log in to the *Extranet* module, although the *Login Name* and *Password* fields have been completed and the *Active* button is checked.

You can fill in additional fields defined during the implementation of the system. You can only view these fields if the mechanism is enabled in the *itcube.ini* file.

IMPORTANT: When adding a contact person, you can also check the *Update email links* field. If this field is checked, the ITCube system will mark all the emails exchanged with the contact

person so that they can easily be tracked in the system (these emails will be linked with the contact person).

When you have completed all the required fields, confirm the addition of the new contact person to the database by clicking on *Save* or cancel the process and go back to the *Main Panel of the ITCube* system by clicking on the *Cancel* button.

Managing contact persons

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do so, use the **Companies->Contact list** option. The system will open a *Contact list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#). You can search for data in the following columns: *Owner*, *Operator*, *Status*, *Contact* (first name and surname), *Company* (Contractor's name), *Address* and by the *Additional* column, which contains practically all the fields from the contact person form.

Additionally, at the bottom of the form, there are buttons you can use to narrow down the search only to active or inactive contact persons.

Options available in the context menu for contact persons

In the first column on the left (*No.*), in the contact person viewer, there is an action button you can click on for the system to display a handy menu with options such as displaying record content, editing the data in the record, deleting the record from the system, adding a note, delegating a tasks, sending an email to the contact person and bookmarking the record in the *Main Panel* of the *ITCube* system.

Viewing and modifying contact person

A description of how to view and modify contractor records can be found in a [separate section](#).

Printing a label

At any time, you can print a sticker with details of a contact person's address. To do so, please left-click on the action symbol next to the record number and select the *Print label* option. The ITCube system will open a form where you will be able to define print settings. For more information about printing labels (stickers) for envelopes, please refer to the section with information on [printing envelopes](#).

Exporting electronic business cards

The ITCube system allows you to export a contact person's contact and address details into the vCard format. To do so, please left-click on the action symbol and select the *Export to vCard* option. The ITCube system will open a window where you will be able to save the file in VCF format.

Adding a sales document

To add an offer, an order or an invoice related to a particular contact person, please left-click on the action symbol next to the record number and select the *Add offer/order/invoice* option. The ITCube system will open a form identical with the one you use to add an offer/order/invoice using the **Trade->Add offer/order/invoice** option.

Adding a purchase document

To add a purchase related to a particular contact person, please left-click on the action symbol and select the *Add purchase* option. The ITCube system will then open a form identical with the one you use to add a purchase using the **Trade->Add purchase** option.

Recording an income/cost

At any time, you can record a revenue or a cost and link it with a contact person. To do so, please left-click on the action symbol and select the *Add income/cost* option. The ITCube system will open a form identical with the one you use to add an income/cost using the **Trade->Add income/cost** option.

Delegating tasks

You can link a task with any contact person. To do so, please left-click on the action symbol and select the *Add/delegate task* option. The ITCube system will open a form identical with the one you use to delegate a task using the **Tasks->Add/Delegate task** option.

Adding a note

You can link a note with any contact person. To do so, please left-click on the action symbol and select the *Add note* option. The ITCube system will open a form identical with the one you use to add a note using the **Notes->Add note** option.

Adding a document/shortcut

You can link a document and/or shortcut with any contact person. To do so, please left-click on the action symbol next to the record number and select the *Add document* or *Add shortcut* option. The ITCube system will open a form identical with the one you use to register a document or a shortcut.

Opening a project

At any time, you can open a new project linked with a particular contact person immediately. To do so, please left-click on the action symbol next to the record number and select the *Open project* option. The ITCube system will open a form identical with the one you use to open a project using the **Projects->Open project** option.

Sending correspondence

You can send a letter, an email or a fax to any contact person. To do so, please left-click on the action symbol next to the record number and select the *Send letter* or *Send fax* or *Send email* option. The ITCube system will open a form identical with the one you use to send an email using the **Mail/Fax->Send letter** or **Mail/Fax->Send email** or **Mail/Fax->Send fax** option. Additionally, the *Contractor/Contact person* and *address* fields will be auto-populated with the details of the contact person you wish to send a letter to (an email or a fax).

Adding a service contract / guarantee

At any time, you can add a new service contract / guarantee linked with a particular contact person immediately. To do so, please left-click on the action symbol and select the *Add contract/guarantee* option. The ITCube system will open a form identical with the one you use to register a service contract using the **Service->Add contract** or **Service->Add guarantee** option.

Adding a service request

To add a new service request linked with a contact person, please left-click on the action symbol and select the *Add service request* option. The ITCube system will open a form identical with the one you use to register a service request using the **Service->Add service request** option.

Adding a rental

As in the case of service requests, you can, at any time, add a new rental linked with a particular contact person immediately. To do so, please left-click on the action symbol and select the *Add rental* option. The ITCube system will open a form identical with the one you use to register a new rental using the **Service->Add rental** option.

Bookmarking records

Any record may be bookmarked at any time, i.e. placed in a dedicated area of the *Main Panel* of the ITCube system. As a result, your most important records, e.g. those you use frequently, will be displayed in a visible place and made easily available. To delete a bookmark, click on the action symbol to the right of the contact name (in the *Main Panel* of the system), select the *Delete bookmark* option and confirm your choice (by clicking on *Yes* in the selection window).

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

Planning travel routes

ITCube CRM makes route planning easier. The route is displayed using the publicly available Google Maps server. To use route planning functions, select the **Companies->Route planning** option.

When defining via points, you can choose one of two options. The first one is to manually define the companies to be visited. The other one is to instruct the system to the job for you. In the other case, the system will use the tasks and service tasks recorded in the system to plan the route.

To enter via points manually, use the *Starting location* and *Destination* fields. In the *Starting location* field, select your company's location (locations are entered by the administration using the **Companies->Dictionary->Geographic location**) option.

IMPORTANT: If your Internet browser supports HTML 5 (the latest versions of Google Chrome, Firefox do) and if you give the location permission to your browser, then the *Starting point* drop-down list may also include the *Current position* option. This function is particularly important if you use mobile devices during a business trip.

Then proceed to the *Destination* fields to select the contractor locations to be visited as part of the route. These locations will be marked on the map in the order of the fields. Additionally, for each company there are two buttons you can use to move up and down the location list. This allows you to change the order of the locations on the map.

To use the automatic definition of via points, use the *Use tasks to fill locations* option. Use that option to define the period for tasks that are to be used. Also, you need to name the person responsible for carrying out the tasks, the task types (not more than three) and the task statuses. When you have completed the fields, confirm your choice by clicking on the *Add* button. The fields in the *Destination* will be auto-populated with the names of the companies linked with the tasks that meet the specified criteria.

IMPORTANT: If no value has been selected in the *Starting point* field, the initial location will be the first location named in the *Destination* field.

When you have completed the location list, click on the *Generate* button. The route map will be displayed.

Actions affecting a group of contractors

The ITCube system allows you to perform actions affecting groups of contractors. This mechanism allows you to change vocabulary fields for all contractors in a pre-defined group. Actions on

contractor groups may be performed by the administrator or any user with the authorisation *Company group action management*. To define a group of contractors, select the **Companies->Group actions->Company group action**. If you select this option, a new form will be opened where you will be able to set the criteria according to which contractors will be added to the group. The following fields can be found in this form:

- *Group name (mandatory)* - use this field to enter the name under which the contractor group criteria will be saved;
- *Owner(*)* - use this field to allow the administrator to name the owner of the contractor group;
- *Company list* - use this field to define enumerative contractor groups. These (enumerative) contractor groups are not set up according to the criteria to be met by its members. Instead, they are made of individual records you specify. The *Company list* field is a list of contractors in such a group. This group may be narrowed down by completing the other fields (e.g. *Industry, Group*). If this field is left empty, the system will assume that the group should be set up based on the parameters defined in the other fields for all records.
- *Company*;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City, Region, Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Operator*;
- *Company owner*;
- *Last contact* - a set of fields where you can select only contractors contacted with in a specified timeframe. In addition to the timeframe, you can enter the type of entry to be used as the description of the most recent contact with a particular customer.

Example 1. If you wish to select the contractors you have contacted over the last three months ('contacted' means the receipt of an email or the performance of a task related to the contractor);

- In the *Last contact* field in the *Contact* subsection, select 3 months.
- In the Notes field, do not select any value. In the Tasks and Correspondence fields, select **Any type** and *Incoming correspondence*, respectively.

Example 2. If you wish to select the contractors you have not contacted over the last twelve months ('contacted' means the receipt or sending of an email and a *Call made* type of note), then

- In the *Last contact* field in the *No contact* section, select *Year*.

- In the Tasks field, do not select any value. In the Notes and Correspondence fields, select *Call made* and **Any type**, respectively.

IMPORTANT: Remember that when defining a *Contact within the last* contractor group, the *Tasks*, *Notes* and *Correspondence* fields are linked using the word *Or*. However, if you are defining a *No contact within the last* contractor group, these fields are linked using the word *And*.

- *Project participation* - use this field to narrow down the number of contractors to those who participated in the specified projects. In addition, you can specify whether a particular contractor participated in all the specified projects (the *and* field is checked), or at least one of the projects (the *or* field is checked). Please note that you can also use this field to specify individual stage of each project. If you wish to select a particular project stage, then with the project viewer displayed, go to the context menu of the project and select the *Attach project stage to the form* menu. This menu contains a list of all the phases of the project. Importantly, the *Project participation* field may contain entries about projects as well as individual project stages;
- *Features* - use this field to select a number of attributes describing the contractor. In addition, you can specify whether the contractor must have all these attributes (the *and* field is checked), at least one of the attributes (the *or* field is checked) or none of them (the *not* field is checked).
- *Product category* - this field allows you to select a number of product categories that the contractor is interested in. In addition, you can specify whether the contractor is to be interested in all the selected product categories (the *and* field is checked), at least one of them (the *or* field is checked) or none of them (the *not* field is checked).
- *Range* - use this field to define a range of records from the entire database of records.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the contractor is to be included in the contractor group you are setting up.

IMPORTANT: If the additional contractor field definition mechanism is enabled, you can use these fields (if they are drop-down lists) to specify the contractor group you are setting up.

When you have defined the settings for your contractor group, you can proceed to set up the group. To do do, click on the *Add* button. The contractor group settings will be saved.

To perform an action affecting a contractor group, select a contractor group in the *Group preview section* window and click on the *Action* button. The ITCube system will open a new window where you will be able to modify your contractor group details and, most importantly, you can select the fields to be modified. You can modify the following fields: *Group*, *Industry*, *Status*, *Acquisition type*, *Potential*, *Operator*, *Owner* and *Price level*. In addition to the above modifications, the group

action mechanism allows you to add/delete a feature, a product category or a group of authorisations for all the defined records. Confirm your choice by clicking on *Save*. However, if you click on *Delete*, the system will delete records. As a result, the values of the fields in the selected records will not be changed, but deleted irreversibly.

IMPORTANT: Before performing any action affecting a contractor group, it is advisable to make a backup copy on a server, as such actions are irreversible. What is more, by clicking on the *Delete* button, you can delete the entire database.

In addition, you can always delete the contractor group definition by selecting a name in the *Group preview section* window, in the *Group name* and clicking on the *Delete* button.

Actions affecting a group of contact persons

As in the case of contractor groups, the ITCube system allows you to perform actions affecting groups of contact persons. To define a group of contact persons and perform an action affecting the group, select the **Companies->Group actions->Contact group action**. If you select this option, a new form will be opened where you will be able to set the criteria according to which contact persons will be added to the group. The following fields can be found in this form:

- *Group name (mandatory)* - use this field to enter the name under which the contact person group criteria will be saved;
- *Owner(*)* - use this field to allow the administrator to name the owner of the contact group;

The following are fields for the contractor linked with the contact person to be added to the contact person group:

- *Company list;*
- *Project participation;*

IMPORTANT: The *Company list* and *Project participation* fields are described in the previous section.

- *Company;*
- *Group;*
- *Industry;*
- *Status;*
- *Acquisition type;*
- *City, Region, Country;*
- *Potential;*
- *Acquisition date (from/to);*

- *Operator;*
- *Owner;*

Fields regarding directly the contact person:

- *Surname/Name;*
- *Sex;*
- *Age;*
- *Company;*
- *Status;*
- *Acquisition type;*
- *City, Region, Country;*
- *Acquisition date (from/to);*
- *Operator;*
- *Owner;*
- *Last contact;*
- *Project participation;*
- *Features;*
- *Product categories;*
- *Range.*

IMPORTANT: The *Last contact*, *Features*, *Product Categories* and *Range* fields are described in the previous section.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the contact person is to be included in the contractor group you are setting up.

IMPORTANT: If the additional contact person field definition mechanism is enabled, you can use these fields (if they are drop-down lists) to specify the contact person group you are setting up.

When you have defined the settings for your contact person group, you can proceed to set up the group. To do, click on the *Add* button. The contact person group settings will be saved. You can always view the contact person group definition in the *Group preview section* window by clicking on the *Preview* button.

To perform an action affecting a contact group, select a contact group in the *Group preview section* window and click on the *Action* button. The ITCube system will open a new window where you will be able to modify your contact person group details and, most importantly, you can select the fields to be modified. You can modify the following fields: *Communication channel*, *Status*, *Operator*, *Acquisition type*, *Importance* and *Owner*. In addition to the above modifications, the group action mechanism allows you to add/delete a feature, a product category or a group of

authorisations for all the defined records. Confirm your choice by clicking on *Save*. However, if you click on *Delete*, the system will perform the deletion action. As a result, the values of the fields in the selected records will not be changed, but deleted irreversibly.

In addition, you can always delete the contact group definition by selecting a name in the *Group preview section* window, in the *Group name* and clicking on the *Delete* button.

Notes

The ITCube system allows you to add different notes and to link them with contractors, contact persons, projects and project stages. The options you can use to add, modify, delete and view notes and statistics are available in the **Notes** menu.

Types of notes (*)

Before you proceed to enter new notes in the system (**Notes->Add note**), it seems reasonable to divide notes by content (e.g. Warning, Call, Complaint, RFQ). The different types of notes can be linked with graphic symbols to emphasise their importance. The **Notes->Dictionary->Note type** option allows you enter, in the ITCube system, the types of notes to be used in the system.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Entering a new note

To enter a note, use the **Notes->Add note** option. A new *Add note* form will be opened. You can use it to define all the parameters of the new note. The form contains the following fields:

- *Subject*;
- *Date* (mandatory) – use these fields to set the period of time the new note covers.

IMPORTANT: When adding a note, you can use the system's stopwatch to measure the time taken to perform a particular action (e.g. to have the conversation with a customer that you are describing in the note). Look to the left of the Date field to find a stopwatch icon.

- *Type* - use this very important menu to define the type of your new note;
- *Files* - this field allows you to add files to your note. A description of how to do this can be found in a separate section.
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Sale/Purchase* - this drop-down menu can be used to link a note with a sales or purchase document;

- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

In the *Add note* form, you can fill in additional fields defined during the implementation of the system. You can only view this section if the note field addition mechanism is enabled.

IMPORTANT: When adding a note, you can decide that the next step will be to add a task or a project thematically linked with the note you are entering (some of the fields in the form will have been auto-populated). To do so, check the following fields, as needed: *Add task* or *Open project*, which can be found at the bottom of the form.

IMPORTANT: At the bottom of the form, there is an *Update project/stage "Connected to"* field option. By checking this option, the contractor linked with a particular note will be added to the list of contractors linked with the project. If the contractor is already entered in the list of contractors linked with that project, that contractor will be ignored.

When you have completed all the required fields, confirm the addition of the new note to the database by clicking on *Save* or cancel the process and go back to the *Main Panel* by clicking on the *Cancel* button.

Managing notes

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do use, use the **Notes->Notes** option. The system will open a *Note list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for notes in the following columns: *Owner*, *Date*, *Type*, *Subject*, *Company* and by the *Additional* column, which contains practically all the fields from the notes form.

Viewing, modifying and deleting notes

A description of how to view, modify and delete records can be found in a [separate section](#).

Interaction analysis

Any CRM system is designed primarily to help you analyse your company's contact with your contractors. Therefore, the ITCube offers you tools you can use to analyse various forms of

contact with our contractors (these forms are pre-defined using the **Notes->Dictionary->Note type**) option. To generate statistics/analyses for the selected contractors or groups of contractors, use the **Reports->Notes->Interaction analysis** and **Reports->Notes->Interaction rankings** as well as **Reports->Notes->Interaction statistics** options.

When you selected the **Reports->Notes->Interaction analysis** option, the system will open a form with three windows. The first window allows you to define the value to be analysed and contains the following fields:

- *Date from/to* - use this field to enter the timeframe for statistical calculations;
- *Owner* – use this field to specify the note user to be analysed;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Type* – this is a drop-down list where you can select the note type to be analysed statistically;

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the notes are linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Project owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The third part of the form contains fields where you can set criteria for statistical calculations based on contractor groups. The following fields can be found in this part of the form:

- *Company*;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Owner*.

IMPORTANT: The ITCube system is designed to perform statistical calculations based on various data combinations. If you select or enter any value in any field, the system will treat that value as

important and include it in the statistics. However, if a field is left empty, it will be ignored by the statistics generation mechanisms.

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. The system will open a window, where you see the number of notes meeting the report criteria for each day.

Interaction statistics

Another report on interactions with your contractors is an interaction statistics report, which you can generate using the **Reports->Notes->Interaction statistics** option. You can use this report to compare a number of types of interactions within the defined contractor group. The *Interaction statistics* results are presented in tabular form, not as a graph (as in the case of *Interaction analysis*).

The *Interaction statistics* form contains three windows. The first window allows you to define the parameters of the notes being analysed. The following fields can be found in this form:

- *Date from/to* - use this field to enter the timeframe for statistical calculations;
- *Owner* - use this field to specify the note user to be analysed;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Type (mandatory)* - use this menu to select values to be included in a comparative analysis.

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the notes are linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The third part of the form contains fields where you can set criteria for statistical calculations based on contractor groups. The following fields can be found in this part of the form:

- *Company*;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;

- *Potential*;
- *Acquisition date (from/to)*;
- *Owner*.

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

Interaction rankings

The last statistical tool available in the ITCube system that can be used for analyses of interactions with contractors is the *Interaction rankings*. It can be used to compare contractor groups in terms of the number of notes of a particular type.

As in the case of the interaction analysis or statistics tools the *Task rankings* form contains three windows. The first one contains the following fields:

- *Date from/to* - use these fields to enter the timeframe for statistical calculations;
- *Owner* - use this field to specify the note user to be analysed;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Type (mandatory)* - use this drop-down menu to select values to be included in a statistical analysis.
- *Sort (mandatory)* - use this drop-down menu do select how the statistics in tabular form are to be sorted;
- *Results limit (mandatory)* - use this drop-down menu to define the number of records to be displayed in the statistics table.

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the notes are linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The third part of the form contains fields you can use to define contractor grouping criteria. The following fields can be defined in this part of the form:

- *Company*;
- *Group*;

- *Industry;*
- *Status;*
- *Acquisition type;*
- *City;*
- *Region;*
- *Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Owner.*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*. The system will display a table where you can compare different contractor groups in terms of the selected type of interaction. To make this comparison even easier, all the records will be arranged in the table according to number of notes. The system will also use a darker colour to mark those records that meet the criteria set in the *Grouping parameters section window*.

Products

When you have finished entering the details of the employees and the company's infrastructure, the next important step is to enter details of your company's products/services in the database of the ITCube system. All the related options can be found in the **Products** menu. You can use the options available in that menu

- to add a new product or a new service,
- to view your database of products or services,
- to define categories reflecting the links between products/services;
- to define units of measurement;
- to define currency symbols;
- to manage exchange rates;
- to set VAT rates;
- to configure types of products/services.

Product categories (*)

The **Products->Product category** option allows the system administrator to describe the links between different types of products. For instance, a 15' LG 57i monitor can be classified under the *LG monitors* category, and this category can be part of the *15' monitors* category, and this one can be a subcategory of the main *Monitors* category. This categorisation will make it considerably easier for you to use, for example, the online store module that is an integral part of the ITCube system or to search for specific records.

Adding / modifying / deleting product categories

If you wish to create product categories specific to your company's requirements, select the **Products->Product category** option from the main menu.

To add a new product category in the system:

- select the name of the category by entering the name in the *Name* field;
- define the key category in the *Parent category* field (start building the structure from 'the top', i.e. from the broadest categories);
- define the logical links between different categories, using the *Links* field. You will be able to use these links to offer product bundles in the *Extranet* module. For instance, if you link the *Textile printing designs* category with the *T-shirts* category, visitors to your online store who are looking for a T-shirt will be informed that they should considering choosing a printing design for the T-shirt. You can also link a particular category with a number of categories by selecting appropriate items and holding the *Ctrl* key;
- to describe the new category by completing the *Note* field;
- to select the user groups authorised to read/write the category. For a user to have access to a particular product, they must have the authorisation in respect of that product itself and the category to which the product belongs;
- to approve the information entered using the *Add* button.

To modify an existing category,

- select the name of the category from the drop-down menu in the *Name (Delete/Modify product category)* section);
- make the necessary modifications using the following fields: *Name* (to change the category name), *Links* (to change the logical links) and *Note* (to change the category description);
- to approve the modifications by clicking on the *Save* button.

To delete a product category from the system,

- select the name of the category from the drop-down menu in the *Name (Delete/Modify product category)* section);
- confirm your choice by clicking on the *Delete* button.

IMPORTANT: If you delete the top category, all the products entered under that category and all its subcategories will be deleted.

IMPORTANT: Due to the risk of distortion of the category structure, it is impossible to modify the category/subcategory structure. Therefore, it is very important to plan these links well before you enter any information into the system.

The *ITCube* system also allows you to decide whether a particular category is to be displayed in the *Extranet* module. To do so, check the *Available in Extranet* field.

IMPORTANT: If a particular category is not displayed in the online store, none of its subcategories will be displayed either, regardless of whether or not the *Available in Extranet* field was checked when setting up that category.

Types of products (*)

The **Products->Dictionary->Products/Services type** field allow you to manage different types of products/services registered in the *ITCube* system and the related discounts.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: When entering or editing a product/service type, you can also define a default discount.

Product features (*)

The **Products->Dictionary->Features** option allows you to categorise products according to any criteria. The *Features* field is displayed as checkboxes, which means you can check the features valid for a particular product or service. The features can also be grouped into sections. The groups will be presented graphically. There is no default value in this dictionary.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Units of measurement (*)

The **Products->Dictionary->Measurement unit** allows you to manage the units of measurements used in the system when adding a product or a sales document. With this dictionary, you can also enter translations of the entries. These will be used when printing sales documents and in the *Extranet* module.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Currency symbols (*)

The **Products->Dictionary->Currency symbol** allows you to manage currency symbols used in the *ITCube* system. If you select this option, the system will open a *Currency symbol* form which the system administrator can use:

- to add a new currency name,
- to define currency symbols;

- to add a default exchange rate, by entering a default rate in respect to the system currency;
- activate/deactivate an existing currency;

IMPORTANT: If you want to use a particular currency for invoicing, pay attention to the *Symbol* fields (e.g. PLN, gr). This information is used when printing invoices.

IMPORTANT: If you issue an invoice in a currency other than PLN, you need to enter exchange rates too.

IMPORTANT: The ITCube can synchronise these exchange rates with the rates published by the National Bank of Poland. The system will not be able to download the exchange rates published by the National Bank of Poland if the currency *Symbol* in the system are not the same as those used by the National Bank of Poland;

VAT rates (*)

The **Products->Dictionary->VAT rate** option allows you to define VAT rates to be used in the ITCube system.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: At the bottom of the form, next to the *Add* and *Save* buttons, there are two additional options you can use to change the VAT rates for existing products. This applies to both sale and purchase transactions. This is particular important when new VAT rates are introduced.

Exchange rates

The **Products->Exchange rate** option allows the administrator and users with the authorisation *Exchange rates management* in the user record (**Users>Users**) to manage the exchange rates used in the *ITCube* system. Exchange rates are used to generate sales statistics/analyses if the sale or purchase prices are given in different currencies. If you select this option, the system will open an *Exchange rates* form which the system administrator or a user can use :

- to add a new exchange rate by selecting a currency symbol, entering the start date from which the exchange rate will apply and providing the quoted exchange rates against the system currency (e.g. 1 USD = 3.96 PLN). To complete the process of adding a new exchange rate, click on the *Add* button;
- to change an exchange rate, by selecting the name of the exchange rate to be modified from the drop-down menu in the *Delete/Modify exchange rate*. Make the necessary modifications and confirm them by clicking on *Save*;

- to delete an existing exchange rate by selecting it from the drop-down menu in the *Currency/Exchange rate* field in the *Delete/Modify exchange rate* section and click on the *Delete* button.

Adding a new product

The **Products->Add product/service** option allows you to create records containing descriptions of the products or services offered by your company. Such records are used by, for example, the system's sales and analysis modules. They can also be used in the online store if the *Available in Extranet* field is checked for the category to which they belong.

If you select that option, the system will open a new *Add product/service* form. This form contains the following fields:

- *Name* (mandatory)
- The *Active* button to the right of the *Name* field, which you can use to set the newly created record as either an active record in the system (the button is checked) or an inactive/archival record (the button is not checked);
- *Code* - a unique product code;
- *Type* (mandatory);
- *Category* (mandatory) - a drop-down menu that allows you to add a product to any category. This will help you organise your product base into a structure. This is essential for the *Extranet* module to operate properly;

IMPORTANT: The database will only contain categories previously created by the administrator using the **Products->Product category** option.

- *CPA / Catalogue No.* - statistical and catalogue number;
- *U.M.* - Unit of measurement;
- *Qty. from/in/to* (mandatory) - these three fields can be used to define the minimum quantity, package size and maximum quantity of the product or service to be sold. If you enter zero in any of these fields or leave it empty, the system will ignore the field.
- *Sale/Purchase VAT* (mandatory);

IMPORTANT: The database will only contain VAT rates previously created by the administrator using the **Products->Dictionary->VAT rates** option.

- The *Apply contractor's discount* field allows you to decide whether the system should take the contractor's discount into account as you define an offer/purchase order relating to the product you are adding (the button is checked). If this button is not checked, the system will automatically ignore the contractor's discount.
- *Purchase price*;

IMPORTANT: Purchase prices (both in product records and when creating a sales document) can only be viewed by users with the authorisation to View purchase prices.

- *Retail price;*
- *Wholesale price;*
- *Price 1;*
- *Price 2;*
- *Price 3;*
- *Price4;*

IMPORTANT: When entering prices, remember that all prices are exclusive of VAT. When entering prices in different currencies, you also need to select the appropriate currency symbol(s) (using the drop-down menu on the right);

IMPORTANT: In addition to product prices, there are buttons you can use to decide which of the prices is to be used the default price for the product you adding.

- *Owner(*);*
- *Note;*
- *Translations* - click on this link for the system to display a new window. In this window, you will be able to enter up to 5 translations of both the name and description of the product being added;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

When entering a new product/service, you can provide, in the standard description, additional information so that the database in the system contains as many details as possible. The *Product/Service additional information* section contains the following options:

- *Features* - a section enabling the identification of selected features that formally describe the properties/variants of the offered assortment;
- *Additions* - this field allows to create logical links within a product database. These links are used in **Trade** module to auto-populate *Items* field if requested;
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Image* - use this option to add a graphic file to a product/services (e.g. a photograph of the product). This file is used by the mechanisms in the *Extranet* module;
- *Icon* - use this option to add a small graphic symbol of a product to a particular product/service. Both icons and images are used in the *Extranet* module. *Icon* - this is also used when printing an offer/purchase order;

- *ERP Id* – this field can be used as a placeholder for a unique product number in an external application;
- *EAN*;
- *GTU* – GTU number;
- *CN* – CN number;
- *WWW* - use this field to enter the address of the webpage with a description of the product.
- *Coordinator* – use this drop-down list to select the person responsible for the product/service on behalf of your company;
- *Producer*;
- *Supplier* - this is a drop-down list from which you can select a supplier of the product;
- *Supplier description* – use this option to provide an additional description of the supplier;
- *Promotion* – activate a promotion mechanism, which is used in the *Extranet* module. To define promotion fill in the following fields:
 - *Start date* - use this field to set the start date of the promotion;
 - *End date* – use this field to set the end date of the promotion.

IMPORTANT: If you choose not to set the start and end dates of the promotion, the promotion will be unlimited in time.

- *Note* - use this field to provide a description of a particular promotion (this description will be printed on the product record in the *Extranet* module);

In the *Add product/service* form, you can fill in additional fields defined during the implementation of the system. You can only view this section if the product/services field addition mechanism is enabled in *itcube.ini* file.

When you have completed all the required fields, confirm the addition of the new product/service to the database by clicking on *Save* or cancel the process and go back to the *Main Panel* by clicking on the *Cancel* button.

Managing products

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do it, use the **Products->Product/Service list** option. The system will open a *Product/services list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for products in the following columns: *Owner*,

Category, Name/Code, Price and by the *Additional* column, which contains practically all the fields from the product/service form.

Additionally, at the bottom of the form, there are buttons you can use to narrow down the search only to active or inactive records. Additionally, you can instruct the viewer to display product icons (the *Show icons* option). If you are searching for products in a particular category, you can also check the *Include subcategories* field. In such a case, the viewer will display the products and services included in the selected category and all its subcategories.

Viewing, modifying and deleting products

A description of how to view, modify and delete records can be found in a [separate section](#).

Sales and purchases

If your company sells/purchases products or services, the system's module that allows you to control your sale and purchase processes is a very useful feature of the ITCube system. You can use the options available in the **Trade** menu to do the following:

- to define the delivery methods, methods of payment and offer stages;
- to set up templates for printing trade documents;
- to define and work on offers;
- to create an order and monitor its processing and delivery;
- to issue an invoice related to the order;
- to monitor the payment of the invoice;
- to record purchase orders;
- to record simple income/cost items;
- to issue guarantee documents for orders;
- to search the database containing all the sales and purchases records;

Delivery methods (*)

The **Trade->Dictionary->Shipping type** option allows you to manage the delivery methods in respect for each product. With this dictionary, you can also enter translations of the entries. These will be used when printing sales documents and in the *Extranet* module.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The *Shipping type* dictionary allows you to enter not only the name of a delivery method, but also to provide its description, which will be displayed in the *Extranet* module.

Payment methods (*)

The **Trade->Dictionary->Payment type** option allows you to manage your payment methods in respect of a particular product or service. With this dictionary, you can also enter translations of the entries. These will be used when printing sales documents and in the *Extranet* module. In addition, there is an option to mark the payment as "Deferred payment" and indicate the due date in days.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: The *Payment type* dictionary allows you to enter also a payment method description, which will be displayed in the *Extranet* module.

Offer stages (*)

The **Trade->Dictionary->Offer stage** option allows you to add, delete or modify offer phases. This information will be used in the sales module when you choose to define a new offer or edit an existing one. When you choose this option, the system will open an *Offer stages* form where you will be able to manage the offer stages.

Adding a new offer stage

To register a new offer stage in the system, you need to complete the following fields in the *Add offer stage* window:

- *Name* – use this field to give a name to the offer phase in the system;
- *Ongoing, Negative, Positive* - flags with which we can mark individual stages, giving them additional context for use in analysis (e.g. offer conversion analysis) and automation (automatic change of stage to Winning when an order is added on the basis of an offer);
- *Ordinal number* - use this field to arrange your offer phases (from the smallest value to the largest one). This field will be used to arrange your offer phases when the system displays statistical calculations (*Sales funnel*);
- *Sale probability* - use this field to assign a sale probability percentage value to each offer phase. This field will be used in *Sales funnel* reports, providing you with a more reliable estimate of the expected profits from your offers.

When you have completed all the fields, click on the *Add* button to cancel the addition of the offer phase by clicking on the *Cancel* button.

Modifying/deleting offer stages

The system administrator may, at any time, modify an offer stage record or delete the record from the system. To modify an offer phase record, select the name of the record from the drop-down menu in the *Name* field of the *Delete/Change dictionary value* section and correct the name (the *New name* field), the offer phase number displayed in the field below (the *New ordinal*

number field) and the sale probability (the *New sale probability* field). To confirm your modifications, click on the *Save* button. To delete a record, click on the *Delete* button.

Templates for printing sales documents (*)

Trade->Dictionary->Offer/Order/Invoice template option allows you to add, delete and modify templates for printing or emailing sales documents. As templates for sales documents and purchase documents are defined according to the same rules, only sales documents will be discussed now.

Adding a new template

To register a template for an offer/order/invoice, you need to fill the fields in three windows. In the first window, you can provide information related to any type of document:

- *Name* - the template name;
- *Default value* - use this selection field to set the item being added as the default value;
- *Eligible division* - drop-down list allowing to restrict the use of the printout template to the specified department. Indicating a particular department also allows the global default value to be overridden.
- *Use translation* - use this field to select the language of the product name/description to be used when defining a sales document;
- *Bank Name, SWIFT Number, Account Number* - fields into which you can enter transfer data. Then these data will be placed on the invoice printout;
- *Company* - a list of companies defined in the system using the *System-Company data* option. When changing the issuing entity, the following field (*Company data*) is immediately completed, which can be supplemented with additional data to be printed on the sales document;
- *Company data* - this field allows you to enter the address and contact details of the issuer of the document;
- *Note* - use this field to enter a text description of the document, which will appear before the main product table. This value will be suggested automatically as you are creating a document linked with the template. You will be able to modify/add this value when you are creating a particular offer/order/invoice;
- *Summary* - use this field to enter a text description of the document, which will appear below the main product table. This value will be suggested automatically as you are creating a document linked with the template. You will be able to modify/add this value when you are creating a particular offer/order/invoice;
- *Invoice/Correction series* - use this field to decide how VAT invoices and Correction invoices linked with the template should be numbered;
- *Invoice note* - use this field to set the default value for the comments field in the invoice document. You will be able to modify/add this value when you are creating a particular invoice;

The second window is dedicated to offers and orders:

- *Style* - use this drop-down list to select a printing style. The following field values are available: *Classic style, Modern style, Compact style*;
- *Colors* – a section where you can define the colors used in the printout of the offer and order in compact style.
- *Logo* - use this field to select a graphic file to be used in your offer/order as your company's logo. The files displayed are those previously registered in the system using the **System->Graphics repository** option.
- *Currency* - use this field to decide whether all the items printed are to be given in the same, **document currency** or in the original currencies of the different items. In the second case, all the currencies used in the document will be grouped in summary sections.
- *Words* - use these fields to specify the words to be used in the printed document;
- *Sections* - use these fields to define the words and related types of information to be added to the printed document. The following field values are available: *Seller, Contractor, Recipient, Sale date, Submission date, Operator, Shipping type, Payment type, Document number, Date and Signature*;
- *Subject* – use this field to enter the text to be displayed below the document number. You cannot change this text when entering a record;
- *Heading* - use to field to enter the text to be displayed before the document *Note*. You cannot change this text when entering a record;
- *Footer* - use to field to enter the text to be displayed at the end of the document. You cannot change this text when entering a record;
- *Columns* - in addition to a text description, each offer/order can contain a section with a list of all its items, with prices, discounts, product photos etc. Which of the information recorded in the system will be displayed and how it will be described will depend on the settings in the above section;

The last section is dedicated to the invoice document (only sales templates):

- *Style* - use this drop-down list to select a printing style. The following field values are available: *Classic style, Modern style, Compact style*;
- *Colors* – a section where you can define the colors used in the printout of the invoice in compact style;
- *Logo* - use this field to select a graphic file to be used in your invoice as your company's logo;
- *Words* - use these fields to specify the words to be used in the printed document;
- *Sections* - use these fields to define the words and related types of information to be added to the printed document. In this section, we can decide whether to print the amount to be paid in words on the invoice printout (only polish version), the exchange rate used to

convert the document currency to PLN (applies to foreign currency invoices) and the summary of VAT rates in PLN (applies to foreign currency invoices). For the KSeF module, we can additionally indicate whether to print the KSeF invoice number and the Annotations sections. You can also specify whether the *Annotations* section should be translated into English as well.

- *Proforma footer* - use to field to enter the text to be displayed at the end of the pro forma document. You cannot change this text when entering a record;
- *Footer* - use to field to enter the text to be displayed at the end of the invoice document. You cannot change this text when entering a record;
- *Columns* - in addition to a text description, each invoice obviously contains a section with a list of all its items, with prices, discounts, etc. The headings of the different columns will depend on the settings in the above section;

If you want to fill in the above fields on the basis of a template that has already been entered into the system database, simply select such a template in the *Delete/Modify template section* and then click on the icon in the right-hand corner of the title bar *Copy data to Add template section*

When you have completed all the fields, click on the *Add* button to save data. By clicking on the *Cancel* button you can discard entered information.

Modifying/deleting printing templates

The system administrator may, at any time, modify a document template record or delete the record from the system. To modify a template record, select the name of the record from the drop-down menu in the *Name* field of the *Delete/Modify template section* and correct the selected fields appearing below. To confirm your modifications, click on the *Save* button. To delete a template record, click on *Delete* button.

Adding a sales document

Once you have defined the basic dictionaries to be used by the **Trade** module and a database of products/services offered by your company has been set up in the system, you can proceed to manage your sales documents using the ITCube system.

To define and enter new offers, orders and invoices in the system, use the **Add offer/order/invoice** option in the **Trade** menu. When you have selected one of the above options, the system will open a form with the following fields:

- *Type* (mandatory) - use this drop-down list to select the type of the record to be added. The following field values are available: *Offer, Active order, Closed order, Invoice, Amount correction invoice, Value correction invoice*. As the ITCube system allows you enter each sales document using the same form, you can smoothly switch from an offer to an order

and from an order to an invoice. Corrective invoices are only available when adding a document based on an existing invoice;

- *Offer stage* - this is a drop-down list from which you can select offer phases. This field is displayed only in the process of entering an Offer-type record;
- *Approver* - this is a drop-down list from which you can select the person to be responsible for approving the document. This field is displayed only in the process of entering an Offer-type record;
- *Subject* (mandatory)
- *Operator* (mandatory) – this is a drop-down list of system users from which you can select the person to be responsible for a particular sale;
- *Sub./Sale Date (mandatory)* - submission date / sale date;
- *Document currency (mandatory)* - this drop-down list allows you to select a global currency to apply to your sales document. This currency will be used when printing your sales document, unless the original currencies were selected for the printing template;
- *Payment* - use this drop-down menu to define the payment method. There are options to choose from these entered using the **Trade->Dictionary->Payment type**;
- *Shipment* - use this drop-down menu to define the delivery method. There are options to choose from these entered using the **Trade->Dictionary->Shipping type**;
- *Contractor note*
- *Operator note*
- *Company* (mandatory), Contact person – this allows you to **link a sales document with a contractor and a contact person**;
- *Recipient/Contact person*;
- *Project/Project stage* – this allows you to **link a sales document with a project and its stage**;
- *Service request* - use this drop-down list to link a sales document with a service request;
- *Files* - this field allows you to link any files with a particular form. This is described in a **separate section**;
- *Owner*(*)
- *Items* - this section allows you to define the products and services to be included in the sales document. To add products to your offer or order, click on **^**. The system will open a product viewer where you will be able to add products to your sales document directly, by entering in the Quantity column and clicking on the product. The system will automatically insert the product/service in the *Items* field. Subsequently, when the product viewer has been closed, click on the *Add* button. The products will be added your basket with the default prices. If *Include additions* option was checked *Items* field with be supplemented with records logically linked with chosen products. It is also possible to add a new product to an offer/order which is not entered in the ITCube database. In such a case, check the *New product* field to the left of the *Add* button. The selected items will be added to your sales document in the position specified in the *No.* field. If you leave the *No.* field empty, the product will be added to the end of the current item list. To add a product not entered in the ITCube database to your sales document and register the product in the database, use

the **+** button. The system will open an *Add product/service* window where you will be able to enter the parameters of the new product. The option to add products at a particular position allows you to group them in logical units (e.g. sets). Also, if you want your product groups to have a subsummary section, separate them with a *Separator*. To do so, check the *Group separator* field to the left of the *Add* button.

- *Template* - this is a drop-down list form which you can select the format in which the printable version is to be displayed. You can choose from a simple description, a standard product list or an extended list (with product descriptions and product photographs added). The template will also determine whether the original names/descriptions of products or their translations will be used when the products are added to a sales document. To define printing templates, use the **Trade->Dictionary->Offer/Order/Invoice template;**
- *Note* - this field contains a description of the sales document. This field will be auto-populated with a value taken from the template;
- *Summary* - this field contains a summary of the sales document. This field will be auto-populated with a value taken from the template;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

A very useful tool is the so-called *Basket*, which contains a detailed description of the added items with the following details:

- the item number (*No.*);
- the name of the product/service (*Name*);
- the quantity of the products offered (*Offer Quantity*);
- the actual quantity of the products ordered (*Order Quantity*);
- unit of measurement (*U.M.*);
- purchase price - visible only if the user has the authorisation to read purchase prices;
- catalogue price;
- the discount for a particular item (*Discount*);
- the final price (*Net price*);
- the VAT rate (*VAT*);
- the net total;
- the gross total;
- the margin/profit total;
- the currencies of the purchase price and the sale price.

You can use the *basket* to modify all the values if you have the required authorisations. The product/service price can be modified manually or using a discount calculator. Additionally, clicking on the **≡** button will give you access to the price list. You can select from six prices defined in the process of adding the product and a profit/margin calculator. At the end of each row in the table, there is the **×** button. If you click in this button, the item in that row will be deleted from the document. Next to the *Name* field, you will also find a button you can use to edit

additional details of the item: *Product code, CPA code, GTU number, CN number, Alternative icon, Product note* and 10 additional general fields. If you select an alternative icon, it will replace the icon in the product record.

In addition to operations on individual items, the *Basket* also offers a *Global Operations* mechanism, i.e. updating selected data for all items. The corresponding menu is located in its upper/right corner and allows, among other things, to update prices and discounts based on current price conditions or to overwrite the discount with a selected value.

The basket also offers the possibility to change the order of items using drag and drop technology (on browsers and operating systems that support this technology).

IMPORTANT: Due to the mechanism for automatically calculating discounts for contractors, the price entered in the *Net price* when the item was added may be different from the price displayed in the price list.

IMPORTANT: If the *Apply contractor's discount* field in a product record is unchecked, the ITCube system will not include the discount when the product is added to the *basket*.

IMPORTANT: If you have no authorisation to *Edit trade document item prices*, you will not be allowed to modify manually the prices suggested by the system. In such a case, you will only be able to change the price level.

IMPORTANT: For correction invoices, the user will not be able to modify all fields manually. Depending on the type of correction invoice, it will be possible to edit the corresponding fields related to the quantity of products or to the selling prices.

IMPORTANT: If you are using the profit margin calculator for a product where the currency of the sale price is different from the currency of the purchase price, it is necessary to use the required exchange rates. The most up-to-date rate will be used which means this rate is not linked with the value of the *Sale date* field.

In the case of orders, there is also a section where you can enter the information needed to issue a pro forma invoices or a VAT invoice. Also, invoice-related fields will be available. The fields are:

- *Number* - this field is active only in the case of Invoice documents. The invoice number will be inserted automatically by the system. The standard format set in the *itcube.ini* file is YYYY/MM/RR for invoices and YYYY/MM/RR/'K'/' for correction invoices;
- *Payment* - this field allows you to monitor the payment process. When you have received payment, you can record it in the system as *Paid*. If the payment is made in parts, you can record it using the *Partly paid* option, entering the amount paid;

- *Issue date* – the issue date;
- *Payment date* – the time limit for the payment of the invoice. This value must be entered in days. In the view mode, this field can also tell you about overdue payments;
- *Settlement date* – the date when the invoice was fully paid. In the view mode, this field can also tell you about overdue payments in the past;
- *Comments*;
- *Seller/Contractor/Recipient* - these text fields contain the address and contact details of the seller and the purchaser. The *Seller* field is auto-populated with information included in the selected template. The *Contractor* and *Recipient* fields will be auto-populated with the address and contact details of the contractor selected in the *Company* and *Recipient* field. The content of all the above fields can be refreshed easily at any time. To do so, click on the refresh symbol to the left of the section name.

When the *KSeF* module is enabled, an *Annotations* section appears, containing the following data:

- Sections related to reduced VAT rates. If the rate 0%, N/A, or ZW is selected on an invoice item, the legal basis related to the applied VAT rate must be provided.

IMPORTANT: The legal basis related to the reduced VAT rate applies to the entire invoice, not to a specific item. This information is required in order to correctly send the invoice to KSeF.

- *Receiver role* – in this field you must indicate how the company specified in the *Receiver* field should be interpreted. The available values include: *Factor, Receiver, Primary entity, Paying part, JST – receiver, GV – receiver*.

IMPORTANT: If a company is selected in the *Receiver* field, one of the values in the *Receiver role* field must also be selected. When the value "JST – Recipient" is selected, the company will be marked with the JST indicator when the invoice is sent to KSeF system. Similarly, when the option "GV – Recipient" is selected, the company will be marked as "GV."

- *Order* – a section where the customer's order number and date can be entered.
- *Agreement* – a section where the agreement number and date with the customer can be entered.
- *Split payment* – an option to mark the invoice payment as Split Payment.
- *Cash method* – an option to mark the invoice with the "Cash Accounting Method" indicator.
- *Other annotations* – an option to enter the WZ document number related to the invoice.

When you have completed all the required fields, the last step is to save the record in the database of the ITCube system. To do, click on the *Save* button. You can cancel the process of adding a purchase order at any time by clicking on the *Cancel* option.

Adding a purchase document

To define and enter new purchase orders in the system, use the **Add purchase** option in the **Trade** menu. When you choose this option, the system will open a form with the same fields as those in the process of adding a sales document. The following fields are available:

- *Type* (mandatory) - use this drop-down list to select the type of the record to be added. You can choose from the following values: *Active purchase*, *Closed purchase*;
- *Approver* - this is a drop-down list from which you can select the person to be responsible for approving the purchase.
- *Subject* (mandatory)
- *Operator* (mandatory) – this is a drop-down list of system users from which you can select the person to be responsible for a particular purchase;
- *Sub./Purch. date* (mandatory) - *submission date / purchase date*;
- *Document currency* (mandatory) - this drop-down list allows you to select a global currency to apply to your purchase document. This currency will be applied in the “to be printed for the supplier” version of the purchase order;
- *Payment*;
- *Shipment*;
- *Contractor note*;
- *Operator note*;
- *Company* (mandatory), *Contact person* – this allows you to **link a form with a contractor and a contact person**;
- *Recipient/Contact person*;
- *Project, Project stage* – this allows you to **link the form with a project and a project stage**;
- *Service request* - use this drop-down list to link a sales document with a service request;
- *Files* - this field allows you to link any files with a particular form. This is described in a **separate section**;
- *Owner*(*);
- *Items* - this section and the Basket mechanisms are described in detail in the previous section, i.e. the section about adding sales documents;
- *Template* - this is a drop-down list form which you can use select the format in which the printable version is to be displayed. You can choose from a simple description, a standard product list or an extended list (with product descriptions and product photographs added). The template will also determine whether the original names/descriptions of products or their translations will be used when the products are added to a purchase document. To define printing templates, use the **Trade->Dictionary->Purchase template**;
- *Note* – this field contains a description of the purchase document. This field will be auto-populated with a value taken from the template;
- *Summary* – this field contains the summary description of the purchase document. This field will be auto-populated with a value taken from the template;

- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

IMPORTANT: If you have no authorisation to *Edit trade document item prices*, you will not be allowed to modify manually the prices suggested by the system.

The last section is a description of the invoice related to the purchase. In the case of a purchase order, the invoice is an external document registered in the supplier's system. The fields in that section include:

- *Number* - this field is inactive because the purchase order is not linked with an invoice registered in the database of the ITCube system;
- *Payment* - this field allows you to monitor the payment process. When the payment has been made, you can record it in the system as *Paid*. If the payment is made in parts, you can record it using the *Partly paid* option, entering the amount paid;
- *Issue date*;
- *Due date*;
- *Settlement date*;
- *Notes*.

When you have completed all the required fields, the last step is to save the record in the database of the ITCube system. To do do, click on the *Save* button. You can cancel the process of adding an offer / purchase order at any time by clicking on the *Cancel* option.

Approving sales documents

Purchase documents and offers are assigned an additional status describing that the document has been approved or rejected by the person named in the *Approver* field. The *Approver* field can be selected manually. Note, however, that the value in this field can be changed by the system automatically directly before the document is saved. This will be the case if the person adding the document has a named superior and automatic control defined the system for documents that meet the specified criteria.

The general rule is as follows: When creating or editing a document, if you do not name an approver and the system does not appoint an approver automatically, the document will be assigned the *Approved* status. If an approver is named, the document will be assigned the *No decision* status. The approver will be notified of the document in their main desktop and will be able to assign either the *Approved* or *Rejected* status. When the decision is made, the approver will not be allowed to change it. The decision may only be changed by the system administrator.

IMPORTANT: To calculate total profit margins or profits, it is necessary to import exchange rates and to convert the calculated amounts into the system currency. The most up-to-date rate of all

the exchange rates available in the database will be used. This rate is not linked with the value of the *Sale date* field.

Invoice settlements

The system's invoice settlement report is an analysis of the payments related to the invoices issued. The report shows all the invoices with a specified settlement status that were issued within a specified period of time. For each invoice, the following information is given:

- Issue date;
- Invoice number;
- Contractors name;
- Due date;
- Days overdue;
- Net amount;
- Amount to pay;
- Paid.

For each sales documents displayed, you can perform a related action. Standard actions include editing, settling or sending/printing a request for payment.

Managing sales documents

A user with the required authorisations in the ITCube system may, at any time, view all the offers/orders/invoices entered in the system, update such offers, modify record types (by switching smoothly from an offer to an order and from an order to an invoice) and record the payment of the invoices. To manage sales documents, you can use the following options: **Trade->Offer list**, **Trade->Orders list** and **Trade->Invoice list**. When you select one of these options, the system will open a form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for sales documents in the following columns: *Owner*, *Operator*, *Sale/Issue date*, *Company*, *Number* and by the *Additional* column, which contains practically all the fields from the sales document form.

At the bottom of the form, there are fields with additional settings. You can decide whether the viewer should display only offers, active orders, closed orders or invoices. Additionally, you can search for sales documents containing a particular product. To do so, use the first field on the left to enter part of the name, code or description of the product. On the right side of the field, you can specify the field according to which the system should perform the search.

IMPORTANT: Depending on the type of the documents viewed, you may have the option to narrow down the search results. In the case of offers, you will be able to select the approval status and the approver. If *INTEGRATOR* module is active, you will be able to define the registration status in an external sales management system.

Managing purchase documents

A user with the required authorisations in the ITCube system may, at any time, view all the purchase orders entered in the system. To manage purchase documents, you can use the following options: **Trade->Purchase list**.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for purchases in the following columns: *Owner, Operator, Purchase date, Company, Number* and by the *Additional* column, which contains practically all the fields from the purchase form.

At the bottom of the form, there are fields with additional settings. You can decide whether the viewer should display active purchases or closed purchases. Additionally, you can search for purchase documents containing a particular product. To do do, use the first field on the left to enter part of the name, code or description of the product. On the right side of the field, you can specify the field according to which the system should perform the search.

Processing trade documents

In the first left-hand column of the trade document viewer, there is a button you can click to open a handy menu with options such as displaying the entire sales document, editing the document record, printing the sales document, downloading as PDF file, emailing/faxing the sales document, deleting the document record and registering the sales document in an external sales management system, as well as adding a related guarantee document.

Viewing and editing trade documents

A description of how to view and modify sales records can be found in a [separate section](#).

Adding a new trade document

Each trade document entered in the database can be used as the starting document for a new record. This allows you to add offers or orders very similar to those already registered quickly and easily. To create a new sales document based on a record from the database, select, from the context menu of that record, the *Add offer/Add order/Add invoice/Add purchase* option. The ITCube system will open a separate window with a form where you can edit the sales document. Many of the fields of the form will have been auto-populated. Note that the system will remember that the new record is based on a record already registered in the database. For information on all

the documents based on the same record (i.e. documents logically linked with that record), use the document view mode and its *Trade history* section. Each record based on another document will be described as such in the *Derived from* field.

Adding a new correction document

Any VAT invoice document saved in the database can be used as a "starting point" for a correction invoice document. In order to create a new correction invoice document on the basis of a record saved in the database, select the *Add amount correction/Add value correction* option from the context menu associated with this record. After performing the above-mentioned operation, the ITCube system will open a separate window with a pre-prepared form for adding a correction invoice. In the case of amount correction, the fields related to product prices taken from the base document will be blocked and the product amounts will by default be the negation of those from the base invoice (total correction, cancelling the base document). Similarly, in the case of value correction, the blockage will apply to fields related to the amount of products for individual items, while prices will be set to 0 (no price change). Importantly, the system will remember the fact that the newly added record was created on the basis of the existing one in the database. Information about all documents created from a given record (that is, logically related) is available on the document preview in the document history section. In addition, each record that was created on the basis of another document will have such information noted in the Base document field

IMPORTANT: If the base invoice has been edited while adding a correction invoice, adding the correction invoice will be blocked and it will be necessary to add it from scratch. For a given invoice it is possible to add multiple correction invoices, but they must be of the same type (amount or value). If you add even one correction invoice, you will not be able to edit the base invoice in the future. Deleting an invoice also deletes all related correction invoices.

Printing a trade document

Each trade document entered in the database can be printed at any time. To do so, please left-click the action symbol next to the record number and select the *Print offer/order/invoice/purchase* option. The ITCube system will open a separate window with a printable version of the trade document for the end customer or supplier.

Printing an order confirmation/purchase confirmation

For each order/purchase entered in the database, you can print a confirmation at any time. To do so, please left-click the action symbol next to the record number and select the *Print confirmation* option. The ITCube system will open a separate window with a printable version of the confirmation for the end customer or supplier.

Printing an invoice duplicate / pro forma invoice

For each order document, you can additionally print a pro forma invoice. For each invoice document, you can additionally print a duplicate. To do so, please left-click the action symbol next to the record number and select the *Print pro forma invoice* or *Print duplicate* option. The ITCube system will open a separate window with a printable version of the selected document.

Downloading documents/confirmations as PDF file

Each trade document entered in the database and any confirmation can be downloaded as PDF file at any time. To do so, please left-click the action symbol next to the record number and select the *Download as PDF* option.

Sending printed documents/confirmations by email, fax or post

Each trade document entered in the database and any confirmation can be emailed or faxed at any time. To do so, please left-click the action symbol next to the record number and select the *Send via email/fax* option. The ITCube system will open a separate window with a form identical to that you were asked to fill in to send an email or fax. Depending on the system settings, the sales document to be sent will be placed in the correspondence content section or in the PDF attachment section.

In the case of sales documents with the *Invoice* status, it is possible to record the posting of a sales document by letter. If you select the *Send via letter* option from the context menu of the invoice, the ITCube system will open a separate window with a form identical to that you were asked to fill in to send a letter (**Mail/Fax->Send letter**). Additionally, in the 'content' field will contain a specially prepared sales document and mechanisms that allow you to print it and to print labels related to a particular contractor/contact person.

Adding tasks/notes/emails/guarantee documents

For each trade document, you can add a task or a note, or send an email related to the document. In the case of orders or invoices, you can also add a guarantee document. To do so, use the following options: *Add note*, *Add/Delegate task*, *Send email*, *Add guarantee*. They are available in the context menu of each record. The objects added in this way will be recorded in the history of the sales document.

Signing orders

In the case of an order document, it is possible to attach a graphic signature of the customer. To bring up the form allowing you to place a graphic signature, select the *Sign order* option. Once the signature has been placed, it will be visible in the order preview. In addition, order editing will be restricted to selected fields so that no substantive changes can be made to the order after it has been signed.

Sending invoices to KSeF

In the case of an invoice document, it is possible to register it in the National e-Invoice System (additional ITCube KSeF module required). To register the document, select the *Send invoice to KSeF* option. The registration process is not immediate and usually takes a few minutes. Therefore, calling up the above function only confirms that the invoice has been correctly submitted for registration. The actual confirmation of the completion of the registration process is the appearance of the value in the *KseF Number* field on the invoice preview. Until the above number appears, the transitional statuses of the registration process are described by the value of the *KseF Status* field. Editing an invoice registered in KSeF will be limited to selected fields so that it is not possible to make substantive changes to the document after its registration.

Cancelling invoices/orders

A user with the necessary authorisation can cancel any invoice or order. The system will not delete the whole record, but will change the status of the sales document from *Invoice* to *Order* or from *Order* to *Offer*. Invoices may only be cancelled by the administrator or a person with the authorisation *Invoice modification*. To cancel an invoice, please left-click the action symbol next to the record number and select the *Cancel invoice* option. The ITCube system will register the record as order and release the invoice number. Follow the same steps to cancel a sales order. The order will be converted into an offer, and the sales order number will be released.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

Registering a sales document in an external sales management system

If the *INTEGRATOR* module is activated, you can register a sales order in a sales management system, e.g. Comarch Erp Opt!ma, Comarch Erp XL, WF-MAG, Symfonia 2.0 or Sage ERP. To register an order in such a system correctly, all the products in the order must be registered in the sales management system (this applies to Comarch ERP Optima and WF-MAG systems). An order registered in the Comarch ERP Opt!ma system will be displayed as a *Recipient's Reservation* or *Pro forma Invoice*. In the case of the WF-MAG and Symfonia 2.0/SAGE ERP systems, an order from ITCube will be displayed in the sales management system as an *External Order*.

Recording an income/cost item

In many cases, you do not need to define and process an order, but only to record a particular amount representing your revenue or cost. To record an income/cost item, use the **Trade->Add income/cost** option in the system menu. The system will open a new form you can use to add a revenue or cost item. It contains the following fields:

- *Subject* (mandatory)
- *Worker* (mandatory) – this is a drop-down list of system users from which you can select the person linked with the revenue/cost item you are adding.

- *Reg./Proc. Date.* (mandatory) – registration/processing date;
- *Income/Cost* - use these fields to enter specific revenue or cost amounts;
- *Currency* - this is the currency to be used to display the values of in the *Income/Cost* fields;
- *Payment/Shippment*;
- *Note*;
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Files* - this field allows you to link any files with a particular form. This is described in a [separate section](#);
- *Owner(*)*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

When you have completed the above fields, click on the *Save*. To register more than one record with similar values, then check the *Add income/cost* before clicking on the *Save* button. In such a case, when the current record has been saved, the system will take you back to the form where you will be able to add a new revenue or cost item. This form will be auto-populated.

Managing income/cost items

To view all the records containing descriptions of the income/cost items entered in the system, select the **Trade->Income/Costs list** option from the system menu.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for revenue and cost items in the following columns: *Owner, Worker, Processing date, Subject, Company* and *Additional*.

Viewing, modifying and deleting income/cost items

A description of how to view, modify and delete records can be found in a [separate section](#).

Sales plans

The ITCube system allows you to define and analyse sales plans. In very brief terms, defining a sales plan means defining a time period and the financial targets that individual employees (or a whole team) are expected to achieve within that time period. Depending on the authorisations, the sales plan analysis means checking that sales plans are achieved by other employees or viewing only your own plans.

To create/modify a sale plan, use the **Trade->Sale plans->Add/Edit sale plans** option. The system will open a form with two sections. In the *Add/edit sale plan* section, you will be able to add a new sale plan or modify an existing sale plan. If you want to add a new sale plan, then in the *Sale plan* field, leave the default value, i.e. *Add new sale plan*. Otherwise, use the drop-down list to select an existing sale plan you wish to modify. By default, this drop-down list shows only active sale plans. If you wish the list to include all the sale plans whenever added to the database, check the *Include inactive*.

The second section contains details of the sale plan to be added or edited. It contains the following fields:

- *Subject* (mandatory)
- *Date* (mandatory) - use this field to enter the time period for the sale plan.
- *Active/Inactive* - use this field to decide whether you wish the sale plan to be visible in sale plan analysis tools or not.
- *Reporting* - this is a multiple-choice field containing the user groups that can display sale plan analysis reports;
- *Company/Group* - use this field to narrow down the analysed sales documents to records linked with a particular contractor or particular contractors from the selected group;
- *Limit type* - use this field to define whether the values to be entered as limits for individual employees should be taken by the system as defined product quantities, revenue or profit only. In addition, you can narrow down the analysis to a particular type of sales document (e.g. only invoices).
- *User/Limit* - this is a list of fields where you can set a limit for each user. Depending on the value in the previous field, this limit can be interpreted as either revenue or profit and will be given in the system currency. Importantly, you do not need to set such limits for all your employees. Each sales plan will only apply to those employees who are checked in the first column.
- *Global limit* - this is the limit for all the employees with limits set in the system. This global limit does not have to add up to the sum of the individual limits. However, if this is the case, you can use the icon next to that field. If you click on the icon, the field will show the sum of all the individual limits.
- *Product category* - this field allows you to narrow down the sale plan to only sales of products in the selected categories. By holding the *CTRL* key, you can select any number of categories.
- *Product* - this field allows you to narrow down the sale plan to only sales of the one, specific product.

When all the fields have been completed, save the changes by clicking on the *Save* button. Once the new sale plan has been added, you will be able to use plan progress analysis tools. Two basic tools are available. One is used to analyse sale plans globally, i.e. for all employees. The other

tool can only be used by a user currently logged in to the system and only to track their own plan delivery progress.

The results of the global analyses will be presented in a report you can generate by selecting the **Trade->Sale plans->Report sale plans** option. This tool is available only to users with the authorisation *Plans reporting*. When you select this option, you will have to decide which of the active sale plans is to be analysed. Importantly, you will be able to select only those plans in respect of which you have the authorisation to generate reports. When you have selected a sale plan, you will receive a report with delivery progress information for that plan and for all the users engaged in its delivery. Additionally, if the plan was not narrowed to only one specific product, you will be provided with a graphical presentation of the revenue and costs for each of the product categories covered by the plan.

The sale plan reporting mechanism can be activated by selecting the **Trade->Sales plans** main menu or, as an alternative, in the contractor's context menu. In this case, the available sale plans will be narrowed down to those with a particular company named in the *Company* field.

For a private analysis, use the report available on the user's main desktop in the *Dashboard->Reports->Private sale plans* section. When you have selected this option, a particular employee will be able to view the delivery progress information regarding the plans linked with them. Importantly, the employee will be able to view only those plans in respect of which they have the authorisation to generate reports.

Sale reports - Profit analysis

To generate profit statistics/analyses for the selected contractors or groups of contractors, use the **Reports->Trade->Profit analysis**.

The *Profit analysis* report will contain a graph showing your sales profit broken down by day or by month. The first section allows you to define the value to be analysed and decide how the results of the analysis are to be presented. The following field values are available:

- *Date from/to* - use these fields to enter the timeframe for statistical calculations;
- *Product* - use this field to narrow down the report to sales documents containing a particular product;
- *Product category* - use this field to narrow down the report to sales documents containing products from a particular product category;
- *Worker* - use this drop-down list to select the system user to be the processor of the sales document;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Currency* - use this option to select only those records which use the selected currency.

- *Analysis (mandatory)* - use this drop-down menu to select values to be included in a statistical analysis. The following values are available:
 - *Profit on active orders*
 - *Profit on closed orders*
 - *Profit on invoices*
 - *Profit on orders/invoices*
 - *Profit on income/costs*
 - *Sale profit* – use this option to generate a statistical summary of all the above types;
- *Presentation (mandatory)* - use this drop-down menu to select the method of presentation of the results of statistical calculations. You can choose from the following values:
 - *Monthly basis*
 - *Daily basis*

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the document is linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The last part of the form contains fields where you can set criteria for statistical calculations based on contractors. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Operator*;

- *Owner.*

IMPORTANT: If you select or enter any value in any field, the system will treat that value as important and include it in the statistics. However, if a field is left empty, it will be ignored by the statistics generation mechanisms.

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

Sale reports - Profit ranking

Another statistical tool available in the ITCube system that can be used for profit analyses is *Profit ranking*. It can be used to compare contractor groups in terms of the profit generated by them. To generate a report, select the **Reports->Trade->Profit ranking**. The first section of the form contains the following fields:

- *Date from/to* - use these fields to enter the timeframe for statistical calculations;
- *Product* - use this field to narrow down the report to sales documents containing a particular product;
- *Product category* - use this field to narrow down the report to sales documents containing a product from a particular product category;
- *Worker* - use this drop-down list to select the system user who was set as operator of the sales document;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Currency* - use this option to select only those records which use the selected currency.
- *Analysis (mandatory)* - use this drop-down menu to select values to be included in a statistical analysis. The following values are available:
 - *Profit on active orders*
 - *Profit on closed orders*
 - *Profit on invoices*
 - *Profit on orders/invoices*
 - *Profit on income/costs*
 - *Sale profit* - use this option to generate a statistical summary of all the above types;
- *Sort (mandatory)* - use this drop-down menu do select how the statistics in tabular form are to be sorted;
- *Result limit (mandatory)* - use this drop-down menu to define the number of rows to be displayed in the statistics table.

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the document is linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The last part of the form contains fields you can use to define contractor grouping criteria. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Operator*;
- *Owner*.

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*. The system will display a table where you can compare different contractor groups in terms of the profit. To make this comparison even easier, all the records will be arranged in the table according to the amount of the profit generated, with the records that meet the criteria set in the *Grouping criteria* window marked.

Sale reports - Offer statistics

The last statistical tool available in the ITCube system that can be used for sale analyses is *Offer statistics*. It can be used to analyse and compare offers (the number of offers and the estimated profits) at different phases. This report will be available if you select the **Reports->Trade->Offer statistics**.

As in the case of the profit statistics tool or the profit rankings tool, this form contains three sections. The first one contains the following fields:

- *Date from/to* - use these fields to enter the timeframe for statistical calculations;
- *Product* - use this field to narrow down the report to sales documents containing a particular product;
- *Product category* - use this field to narrow down the report to sales documents containing a product from a particular product category;
- *Operator* - use this drop-down list to select the system user to be the processor of the offer;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Currency* - use this option to select only those records using the selected currency.
- *Offer stage (mandatory)* - use this field to select the offer stages to be included by the system in statistical summaries.

The second part of the form contains fields where you can set criteria for statistical calculations based on the projects with which the offers are linked. The following fields can be found in this part of the form:

- *Date from/to* - use these fields to enter the timeframe for the project;
- *Owner*;
- *Coordinator*;
- *Template*;
- *Project*;
- *Project stage*;

The last part of the form contains fields where you can set criteria for statistical calculations based on contractors. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Owner*.

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*.

Servicing

The ITCube system allows you to sell equipment requiring after-sales servicing. This is managed in the *Service* module. In this module, you can easily issue a guarantee document in respect of any piece of equipment and to record all the repairs, service check and rentals in respect of the equipment. The history record for a product serviced by your company contains different types of service requests. The ITCube system allows you to add different types of service requests, which you need to define before you start working with the system. The system comes with a pre-defined service request type – *Checkup*. You cannot delete or modify this service request type. It will allow your company to carry out regular service checks of the serviced equipment. Service requests are processed by adding or delegating service tasks. All service tasks are sent directly to the history record of the related service request, which allows you to view all the tasks completed in respect of that request. A service request does not have to be issued for a guarantee document. It is possible to issue a one-off service request that is not related to any servicing agreement. It is possible to issue a service request in respect of a so-called service contract. A service contract is a contract between your company and your customer for the provision of servicing. Each service contract has its history record in the system. This record is managed in the same way as the history records for guarantees.

Furthermore, the *Service* module allows you to search for and view guarantees, contracts, service requests and service tasks. As an addition to the viewers you can use various reports for guarantee, contracts, service requests and service tasks. These reports can also be exported to an Excel spreadsheet. The *Device history* report is worth mentioning, because you can use it to find easily all the tasks performed in connection with a particular piece of equipment. The ITCube system allows you to create a database of devices with their precise descriptions. You can also use *incidental devices*. If your company sells a large range of products (e.g. mobile phones, scales etc.), it is easier to use *incidental devices* to avoid creating a device record each time. Another method is to create a database of devices with precise descriptions (e.g. excavators, ships) and to service and/or rent such devices/machines out.

Types of guarantees (*)

Before you proceed to enter new guarantees into the system, it is necessary to set up guarantee categories in the database. The **Service->Dictionary->Guarantee type** allows you to enter the names of all the types of guarantees to be used in the ITCube system.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Types of service contracts (*)

As in the case of guarantee types, before you start working with the ITCube system, you need to define the types of service contracts. To do so, select the **Service->Dictionary->Contract type** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Types of service requests (*)

As in the case of guarantee types and service contract types, it is worth spending some time to define types of service requests. To do so, select the **Service->Dictionary->Service request type** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Types of service tasks (*)

To define types of service tasks, select the **Service->Dictionary->Service task type** option. We can associate graphic symbols with individual types and thus highlight the most important ones. Additionally, for each type of activity, we can define a default duration, which significantly improves the quality of reports analysing employee working time.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Types of devices (*)

Before you proceed to enter new equipment (devices) into the system, it is necessary to set up their categories in the database. The **Service->Dictionary->Device type** allows you to enter the names of all the types of machines to be used in the ITCube system.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Types of rentals (*)

Before you proceed to enter new rentals into the system, it is necessary to set up their categories in the database. The **Service->Dictionary->Rental type** allows you to enter the names of all the types of rentals to be used in the ITCube system.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Guarantee symbols (*)

A symbol may be defined for each guarantee. Therefore, before you start working with the ITCube system, you need to define the *Guarantee symbols*. To do so, select the **Service->Dictionary->Guarantee symbol** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Service contract symbols (*)

As in the case of guarantees, a symbol can be defined for each service contract. Therefore, before you start working with the ITCube system, you need to define the service contract symbols. To do so, select the **Service->Dictionary->Contract symbol** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Service request symbols (*)

In addition to guarantee symbols and service contract symbols, the ITCube system allows you to define service request symbols. To do so, select the **Service->Dictionary->Service request symbols** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Guarantee statuses (*)

A status may be defined for each guarantee (e.g. Active or Closed). Therefore, before you start working with the ITCube system, you need to define guarantee statuses. To do so, select the **Service->Dictionary->Guarantee status** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Service contract statuses (*)

As in the case of guarantees, a status may be defined for service contract. Therefore, before you start working with the ITCube system, you need to define service contract statuses. To do so, select the **Service->Dictionary->Contract status** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Service request statuses (*)

As in the case of guarantees and service contracts, a status can be defined for each service request. Therefore, before you start working with the ITCube system, you need to define service request statuses. To do so, select the **Service->Dictionary->Service request status** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Service locations (*)

Before you start working with the ITCube system, you can define so-called *Service locations*. These are places where maintenance requests will be received. To do so, select the **Service->Dictionary->Service location** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Templates for printing guarantees, contracts, service requests (*)

Service->Dictionary->Guarantee template, **Service->Dictionary->Contract template** and **Service->Dictionary->Service request template** options allow you to add, delete and modify templates for printing guarantees, contracts or service requests. When you select this option, the system will open a *Guarantee template*, *Contract template* or *Service request template* form where you will be able to manage the template database.

Adding a new template

To register a printing template, you need to fill the following fields in the *Add template* section:

- *Name* - use this field to give a name to the template in the system;
- *Default value* - if you check this field, the new template will be set up automatically by the system in the process of creating a service document;
- *Style* - use this drop-down list to select a printing style. The following field values are available: *Classic style*, *Modern style*, *Compact style*;
- *Logo* - use this field to select a graphic file to be displayed in the printed document as your company's logo.
- *Words* - use these fields to specify the words to be used in the printed document;
- *Sections* - these fields contain the information to be displayed in the header of the document as it is printed. To the right of this field, you can check the fields to be displayed next to the header;
- *Header* - use this field to enter the text to be displayed in the printed document before the description. This text is 'fixed' and cannot be modified by users when adding/editing a service document;
- *Comments* - use this field to enter a text description of a guarantee, service contract or service request. This value will be prompted by the system. You will be able to modify/add this value when you are creating a particular record;
- *Comments field position* - use this field to select the position of the description on the printed document;
- *Columns* - in addition to a text description, each guarantee, service contract or service request may contain a section with a list of all its items with serial numbers, factory numbers and comments. Which information entered in the system will be displayed depends on the settings in the above field.

- *Footer* – use this field to enter the text to be displayed at the bottom of the printed document. This text is 'fixed' and cannot be modified by users when adding/editing a service document;

IMPORTANT: In the form used to define a template for a guarantee, service contract or service request, you can change all the phrases to be included in the printed document. This allows you to set up the printed document, e.g. in foreign languages.

IMPORTANT: In the printed document form, you can add fields defined during the implementation of the system. The options offering this functionality will only be available if the additional field management system for guarantees/service contracts/service requests is enabled (in the *itcube.ini* configuration file).

If you want to fill in the above fields on the basis of a template that has already been entered into the system database, simply select such a template in the *Delete/Modify template section* and then click on the icon in the right-hand corner of the title bar *Copy data to Add template section*

To add a new template, click on the *Add* button or cancel the addition of the template by clicking on the *Cancel* button.

Modifying/Deleting a template

The system administrator may, at any time, modify a document template record or delete the record from the system. To modify a template record, select the name of the record from the drop-down menu in the *Name* field of the *Delete/Modify template* window and correct the selected fields appearing below. To confirm your modifications, click on the *Save* button. To delete a template record, click on *Delete* button.

Service request features (*)

The **Service->Dictionary->Service request features** option allows you to categorise service requests according to any criteria. The *Features* field is displayed as checkboxes, which means you can check the features valid for a particular service request. The features can also be grouped into sections. The groups will be presented graphically. There is no default value in this dictionary.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Adding a guarantee/contract

This section will tell you how to add guarantees and service contracts, as these objects are very similar. To add a service contract, use the **Service->Add contract** option. If you wish to add a guarantee, you can either

- select the **Service->Add guarantee** option or

- select the *Add guarantee* option from the context menu of an order or invoice. In this case, the guarantee will be linked with the sales document.

When you select the guarantee/service contract addition option, the system will open an *Add guarantee/Add contract* form with two sections. In the first section the following fields are available:

- *Number* (mandatory) – a unique number of the service document. The default value in this field is the highest guarantee/contract number entered in the ITCube database plus one, according to the format defined in the *itcube.ini* file (e.g. 2018/01/00095);
- *Subject* (mandatory)
- *Date from/to* (mandatory) - use this field to enter the start date and end date of the guarantee/service contract;
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Recipient/Contact person* – use this field to link the document with a recipient and a contact person;
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Sale/Purchase* - this drop-down menu available only in the case of a guarantee that can be used to link a guarantee with a sales or purchase document;
- *Symbol*;
- *Status* - use this drop-down menu to set the status of the document.
- *Type (mandatory)* - use this drop-down menu to set the status of the guarantee/service contract;
- *Coordinator* - this is a drop-down list with the names of ITCube system users. Use this list to select the person to be responsible for the service document being added;
- *Checkup* - this is a drop-down list with service check intervals. There are two values available: *Time* - select this value if you wish the service checks to be performed every few months (the exact interval is to be entered in the *Checkup interval* field); *Counter* - select this value if you wish the service checks to be performed according to operating time counter readings (the exact interval is to be entered in the *Checkup interval* field);
- *Checkup interval* - use this field to enter the period of time between service checks. Use this field to enter either the number of months (if you have selected the *Time* value in the *Checkup* field) or a numerical value indicating the counter reading (if you have selected the *Counter* value in the *Checkup* field);
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Owner(*)*;
- *Template* – this field allows you to link a template with the printed document;
- *Comments*;
- *Guarantee for/Contract for* - use this field to define the devices to be covered by the service document. There are 5 buttons next to this field:

- ^ - use this button to select products registered in the ITCube system and then to enter their serial numbers and factory numbers. As a result, the guarantee/contract will be linked with an *incidental device*;
- + - use this field to register a new product in the ITCube system and then to enter its serial number and factory number. As a result, the guarantee/contract will be linked with an *incidental device*;
- ^ - use this button to select a device from the device viewer (you can select a record from the device database or an incidental device);
- + - use this field to register a new device in the ITCube system database and then to add the device to the guarantee/contract you are adding;
- x - this is a graphical symbol you can use to delete a product or device in the *Guarantee for/Contract for* field.

When you have selected the device for which the guarantee/contract is to be issued, click on the *Add* button. The form will be extended and now include additional fields. You can use these fields to enter details such as *Serial number*, *Factory number* or *Comments* for each item in the document.

- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

The second section allows you to complete additional fields linked with a guarantee/service contract, defined during the implementation of the system. This window will be displayed if the mechanisms for defining additional fields related to guarantees/service contracts are enabled in *itcube.ini* file.

IMPORTANT: In the process of adding a guarantee/contract, you can also add a service request. To do so, select the *Add service request* field.

IMPORTANT: When adding a guarantee/contract, you can check the *Insert/Link device using serial number* button. If you check this button, then in the process of adding incidental devices in a service document record, the system will also check whether a device with that serial number is already registered in the device database. If the system finds a device with the same serial number, it will link it with a guarantee/contract item. Otherwise, the device will be registered in the device database and then linked with a service document item.

When you have completed all the required fields, confirm the addition of the new service document to the database by clicking on *Save* or cancel the process and go back to the *Main Panel* by clicking on the *Cancel* button.

Managing guarantees and contracts

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do use, use the **Service->Guarantee list** or **Service->Contract list** option. The system will open a *Guarantee list* or *Contract list*, form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for guarantee/contract in the following columns: *Owner, Coordinator, Date to, Company, Number, Subject* and by the *Additional* column, which contains practically all the fields from the guarantee/service contract form.

At the bottom of the viewer, there are four additional fields (*Symbol, Product, Factory number, Serial number*). You can use them to search for a guarantee/contract. This will allow you to search for service documents with a particular symbol or set criteria for devices covered by guarantees/contracts.

Options available for a guarantee/service contract

In the first left-hand column (*No.*) of the guarantee/contract viewer, there is a button you can click to open a handy context menu with options such as displaying the entire guarantee/service contract, editing the guarantee/service contract record, printing the service document, downloading as PDF file, adding a service request or deleting the record (this option is available to the administrator only).

Viewing, editing and deleting records

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If you delete a guarantee or a service contract, all the records (service requests, service tasks, orders linked with service requests) linked with that document will be deleted too.

Adding service requests

At any time, you can add a service request that will later be the basis for the history record of a guarantee/service contract. When you click on *Add service request*, you will be taken to a form where you will be able to create a service request.

Printing service documents for customers

At any time, you can print a guarantee or a service contract using the selected template. To print a service document for a customer, please left-click the action symbol next to the record number and select the *Print guarantee/contract* option.

Downloading documents as PDF file

Each guarantee or service contract entered in the database can be downloaded as PDF file at any time. To do so, please left-click the action symbol next to the record number and select the *Download as PDF* option.

Income/Cost and Workload reports

From the guarantee/service record, you can generate a *Summary of income/cost* report. This report is an easy way to check the cost of servicing in respect of a particular guarantee/contract or how much you earned from paid service requests. This report will contain a list of service requests, including the income/cost items entered (based on an analysis of the *income/cost* fields in the service requests record and the related service task records). The *Summary of tasks* report is an analysis of the time spent on performing service tasks.

Adding a service request

The ITCube system allows you to add service requests to guarantees and contracts, but you can also add one-off service requests. To add a service request, select the guarantee/contracts viewing mode (**Service->Guarantee list**, **Service->Contracts list**) and then select the *Add service request* from the context menu or simply select the **Service->Add service request** option from the main menu. When you select this option, the system will open an *Add service request* form with the following fields:

- *Symbol*;
- *Number* (mandatory) – a unique number of the service request. The default value in this field is the highest service request number entered in the ITCube database plus one, according to the format defined in the itcube.ini file (e.g. 2018/01/00008);
- *Subject* (mandatory)
- *Linked with* (mandatory) – use this list to decide what the service request is to be linked with. The following three values are available: *No link*, *Guarantee*, *Contract*;
- *Guarantee* (mandatory) – use this field to link the service request with a guarantee;
- *Contract* (mandatory) – use this field to link the service request with a contract;
- *Company/Contact person* – this allows you to link the form with a contractor and a contact person;
- *Recipient/Contact person* – use this field to link the document with a recipient and a contact person;

IMPORTANT: If you are adding a one-off service request, it is possible to select only contact person (who is not linked with the contractor). Note that you must select a contractor or a contact person.

IMPORTANT: If the contact person you wish to add is not registered in the ITCube system yet, you can register the person when adding the service request, by clicking the + button.

- *Project, Project stage* – this allows you to **link the form with a project and a project stage**;
- *Service date* - use this field to enter the date and time by which the service request must be performed, as agreed;
- *Status* - use this drop-down menu to set the status of the service request. You can choose from the statuses previously entered in the system using the **Service->Dictionary->Service request status** option.
- *Type (mandatory)* - use this drop-down menu to set the status of the service request. You can choose from the statuses types entered in the system using the **Service->Dictionary->Service request type** option.
- *Reception date* - use this field to enter the date and time of the receipt of the service request;
- *Series/To* - use this field to add periodic service requests. In the first field, specify the series and interval (every day, every week, every month etc.). If you select the daily basis, the system will also allow you to specify the days of the week. The *To* field contains the completion date of the series period;
- *Coordinator* - this is a drop-down list with the names of ITCube system users. Use this list to select the person to be responsible for the performance of this service request;
- *Coordinator reminder* - use this field to decide when you wish the coordinator to be informed of the new service request;

IMPORTANT: The reminder is based on the *Reception date*.

- *Receptionist* - this is a drop-down list with the names of ITCube system users. Use this list to select the person that received the service request;
- *Service location* - use this drop-down menu to define the place where the service request will be performed. You can choose from the locations entered in the system using the **Service->Dictionary->Service location** option.
- *Income* - use this field to enter the revenue earned from the service request;
- *Cost* - use this field to enter the cost incurred in connection with the performance of the service request;
- *Currency* - use this field to select the currency of the income/cost of the service request;
- *Files* - this field allows you to add files. A description of how to do this can be found in a **separate section**;
- *Location* - this drop-down menu allows you to define the place where the service request is to be performed (choose between *Client's office/Service's office*).
- *Priority*;
- *Owner(*)*;

- *Service request for* - use this field to define the devices covered by the service request. A description of this field can be found in the section on adding guarantees/contracts (the Guarantee/Contract for field);
- *Template* - this field allow you to link the service request with a particular printing template;
- *Comments* - a description of the service request to be included in the printed document;
- *Note*;
- *Features* - this window allows you to select attributes that describe the service request. Service request attributes can be defined using the **Service->Dictionary->Service request features** section. You can select more than one attribute by checking the appropriate fields.
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

A the bottom of the *Add service request* form, there is an additional section, where you fill in additional fields with details of the service request. These fields were defined during the implementation of the system. This window will be displayed if the mechanisms for defining additional fields related to service requests are enabled in *itcube.ini* file.

IMPORTANT: In the process of adding/modifying a service request, you can also add a service task. To do so, select the *Add service task* field.

IMPORTANT: When adding a service request, you can check the *Insert/Link device using serial number* button. If you check this button, then in the process of adding incidental devices in a service request record, the system will also check whether a device with that serial number is already registered in the devices database. If the system finds a device with the same serial number, it will link that machine with a service request item. Otherwise, the device will be registered in the device database and then linked with a service request item.

When you have completed all the required fields, confirm the addition of the new service request to the database by clicking on *Save* or cancel the process and go back to the *Main Panel* by clicking on the *Cancel* button.

Managing service requests

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do so, use the **Service->Service request list** option. The system will open a *Service requests list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for service requests in the following columns: *Owner, Coordinator, Service Date, Company, Number, Subject* and by the *Additional* column, which contains practically all the fields from the service request form.

At the bottom of the form, there are fields with additional settings. You can use them to narrow down the search results. You can view service requests by priority or symbol, or define criteria for devices contained by the service request (using the following settings: *Serial number, Factory number, Product name*).

In the first left-hand column (No.), which contains the record number, there is a button you can click to open a handy context menu with options such as displaying the entire service request, editing the service request record, adding a service request or deleting the record or a series of service requests (this option is available to the administrator only).

Viewing, editing and deleting maintenance requests

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If you delete a service request, the service tasks linked with the request and the orders linked with the request will be deleted too.

Adding a service task

To add a service task to a service request, select the *Adding a service task* option. The system will open a form where you will be able to add a service task.

Printing a service request

If you need to print a confirmation of the receipt of a service request, you do it easily by selecting the *Print service request* option. The system will open a window with a printable document for the customer.

Downloading service request as PDF file

Each service request entered in the database can be downloaded as PDF file at any time. To do so, please left-click the action symbol next to the record number and select the *Download as PDF* option.

Adding a service request

In the service request viewer, you can also add a service request. If you select the *Add service request* option, the system will open a new service request window with auto-populated fields.

Signing a service request

In the service request viewer, you can choose the option "*Sign service request*". Thanks to this function the system will open a new window in which the person accepting the completion of work will be able to affix their signature in an electronic version (on a tablet, mobile phone or monitor). Such a signature can then be placed on a printout of the service request, provided that in the template the option to print "*Date and signature of the buyer*" is selected. Signed service requests may be edited only and exclusively by users who have privileges to "*Edit signed service request*". In addition, information about the date of signature is placed on the form of the service request. This information can also be used when viewing service requests to find signed or unsigned documents.

Adding a sales document

In the service request viewer, you can add an offer, an order or an invoice linked with that service request. To add a sales document to be linked with the service request automatically, select the *Add offer/order/invoice* option.

Adding a purchase document

In the service request viewer, you can add a purchase document linked with that service request. To add a purchase document to be linked with the service request automatically, select the *Add purchase* option.

Send an e-mail, letter or fax

In the service request viewer, you can send a message linked with that service request. To do so, select one of the following options: *Send letter*, *Send email* or *Send fax*.

Deleting a service request series (*)

If you wish to delete a series of service requests, you can use the following options: *Delete series (unclosed service requests)* or *Delete series (all service requests)*. Use the first of the two options to delete all the service requests of the same series with statuses other than *Closed*. The other option allows you delete all the service request in the same series. The *ITCube* system will ask you to confirm your decision to delete the particular series. If you confirm your decision (by clicking the *Yes* button in the selection window), the record will be removed from the database.

Income/Cost and workload reports

From the service request record, you can generate a *Summary of Income/Cost* report. This report is an easy way to check the cost of performing a particular service request or how much you earned from that service request. This report will contain a list of service tasks, including the income/cost items entered (based on an analysis of the *income/cost* fields in the service task record and the related service task records). The *Summary of tasks* report is an analysis of the

time spent on performing service tasks.

Delegating and performing service tasks

The performance of a service request is based on service tasks. As part of the same service request, you can add many service tasks and these will be added to the history record of the service request. This is an easy way to trace the entire service request performance process.

To add/delegate a service task, select the **Service->Add service task** option from the main menu of the system or select the *Adding service task* option from service request context menu. You can also add a service task in the ITCube service task calendars. When you select any of the above options, the ITCube system will open a new window with a form containing the following fields:

- *Subject* (mandatory);
- *Type* - this is a drop-down list with the types of service tasks you can enter in the system using the **Service->Dictionary->Service task type** option;
- *Date* (mandatory) - use this field to define the start and completion dates (and completion time) of the service task using the system calendar or manually. Using calendar has additional advantage, that it presents in graphical way workload (small, medium, big) of logged user for particular days in context of chosen service task type;
- *Series/To* - use this field to add a series of records, which is described in the section on [adding tasks](#);
- *Service request* (mandatory) - this is a drop-down list you can use to select a service request linked with the service task you are adding;
- *Performer* (mandatory) - this is a drop-down menu you can use to select, from the users registered in the system, the person to be responsible for the performance of the service task. The *Department* drop-down list additionally allows you to narrow the list of users to those working in the selected department which is useful if you have a large number of employees;
- *Delegator*(*) - this field allows the administrator to change the person delegating the record being edited;
- *Priority*;
- *Delegator reminder* - this is a drop-down list that allows you to decide whether the system will inform the delegating person of the completion of the delegated service task (*Task closed*) or not (*Disable reminding*). Additionally, the delegating person can be notified of delay in the completion of the task or of the acceptance of the task by the performer. If you want the system to notify the delegating person of the completion or acceptance of the task, select the *Task closed/accepted* option. Task acceptance is defined as the performer's decision to accept or reject the service task. If you want the system to notify the delegating person of delay in the completion or of the completion of the task, select the *Task*

closed/delayed option. Service task delay is defined as no decision whether to accept or reject the service task when the deadline for its completion has expired. In both cases, service task completion is defined as the decision to set the service task status as either *Closed - success* or *Closed - failure*. If the ITCube system notified the delegating person of the completion or delay in the completion of the delegated service task, you can select the *Disable reminding* option, in which case the system will no longer send such notifications;

- *Performer reminder* - this is a drop-down list where you can decide when the system is to notify the person responsible for a service task completion. If you want the performer to be notified by email in addition to the standard notification method, select the *Mail* option. If the ITCube SMS/ICAL module is active, you can instruct the system to send a text message to the performer to remind them of the service task to be performed or to send a task as an e-mail with an iCalendar invitation. Such an email can be imported automatically into the calendar of your mobile device that supports this format.
- *Status* - use this drop-down menu to check the current status of the service task. There are five options to choose from:
 - *New* - a service task that has only just been entered in the system;
 - *Rejected* - a service task not accepted for performance
 - *Accepted* - a service task accepted for performance
 - *Closed - success, Closed - failure* - a service task that has been closed;
- *Product* - a list of devices imported from the service request. You can use this list to select the product to which the service task relates. You can select any product from the ITCube system database. This will allow you to record, for example, the replacement of spare parts;
- *Serial number*;
- *Factory number*;
- *Comments*;
- *Income/Cost* - use these fields to enter the revenue/cost of performing the service task;
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Delegator note*;
- *Performer note*;

In the *Add/Delegate service task* form, you can fill in additional fields defined during the implementation of the system. You can only view this section if the service task field addition mechanism is enabled in *itcube.ini* file.

IMPORTANT: When adding a service task, you can check the *Insert/Link device using serial number* button. If you check this button, then in the process of adding an incidental device in a service task record, the system will also check whether a device with that serial number is already registered in the device database. If the system finds a device with the same serial number, it will

link that machine with a service task item. Otherwise, the device will be registered in the device database and then linked with the service task.

For a record to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. Before the record is saved, the system may check it for conflicts with other service tasks or absences. If you click on the *Cancel* button, the system will reject all the information you have entered about the service task.

Managing service tasks

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do so, use the **Service->Service task list** option. Now search for the required service task and open the context menu of the service task, where you can perform all the necessary tasks.

Searching for service tasks

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for service tasks in the following columns: *Delegator, Performer, Date from, Type, Company, Subject* and by the *Additional* column, which contains practically all the fields from the service task form.

At the bottom of the form, there are fields with additional settings. You can use them to narrow down the search results. You can view service tasks by priority or symbol, or define criteria for devices linked with the service task using the *Serial number* field.

Viewing and modifying a service task

A description of how to view and modify service tasks can be found in a [separate section](#).

Exporting service tasks to iCal format

If the SMS/ICAL module is on, the context menu for each service task contains the *Export to iCal* option. Calling this option allows you to download the record in a format that is accepted by most mobile devices. As a result, the service task can be automatically recorded in the internal calendar of the mobile device.

Deleting a service task record, deleting a service task series (*)

To delete a record, left-click on the action button next to the record number and select the *Delete record* option. The *ITCube* system will ask you to confirm your decision to delete the particular record. If you confirm your decision (by clicking the *Yes* button in the selection window), the record will be removed from the database. You can also delete a service task series in a similar

way. To do so, select one of the two following options: *Delete series (unclosed service tasks)* or *Delete series (all service tasks)*.

Adding a device

The *Add device* form allows you to create a database of machines to be serviced. The machines added using this form will be displayed by the device viewer if the *Database device* option is checked (this button can be found at the bottom of the viewer and it is checked by default). The machines entered in the database can be used in the process of adding a guarantee, a service contract, a service request, a service contract or a rental. The *Add device* form contains the following fields:

- *Serial number* (mandatory) – a unique serial number assigned to the device;
- *Active* – use this button to check the device as active/inactive (only device checked as active can be rented out);
- *Factory number*;
- *Product* (mandatory) – use this field to link the machine with a product ('product' is defined as a model of the machine);
- *Type* (mandatory) - use this drop-down menu to define the type of the device. You can choose from the types entered in the system using the **Service->Dictionary->Device type** option.
- *Main device* - use this field to link the device with the main device (defines the priority in the device database);
- *Company, Contact person* – this allows to [link the form with a contractor and a contact person](#);
- *Coordinator*;
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

IMPORTANT: You may also find additional fields set up on the device form during the implementation of the system in *itcube.ini* file.

When you have completed all the required fields, confirm the addition of the new device to the database by clicking on *Save* or cancel the process and go back to the *Main Panel* by clicking on the *Cancel* button.

Managing devices

The **Service->Device list** option allows you to search for device in the device database. You can search for devices in the database of incidental devices (i.e. machines added in the process of adding a guarantee, service contract or service request) or those entered using the *Add device* form. To search for a machine entered using the *Add device* form, the *Database device* button at the bottom of the viewer must be checked. You will then be able to search for machines according to the following criteria: *Owner, Type, Serial number, Factory number, Product, Company* or additional column containing remaining fields from device form. Additionally, in the viewing mode, you can narrow down the search to display only *active* or *inactive* devices. If you are searching an incidental device, the *Incidental device* option at the bottom of the viewer must be checked. You will be able to search for the machine using the following columns: *Serial number, Factory number* and *Product name*. The default setting is to search for the device in all types of service documents. However, you can decide whether the search is to cover only service tasks, service requests, guarantees or service contracts. You can also view device by the type of guarantee, contract, service request or service task, and by *Company* or *Recipient* (only if the *Guarantee* or *Contract* option is checked).

Device history

When you find the required device, you can click on it. The system will open a window where you will be able to check its history. The history record of the device will include all the quality guarantees, contracts, service requests and service tasks completed in respect of that device. If the machine is a database device, the history record will also include a section with rental information. The history record can be viewed in any one of the following three different modes:

- *Sort by type* - the record will be divided into guarantees, contracts, service requests and service tasks;
- *Sort by date in ascending order* - the record will be sorted by time, from the oldest object to the most recent one;
- *Sort by date in descending order* - the record will be sorted by time, from the most recent object to the oldest one;

IMPORTANT: When you find the required device, you can select the *Add service request* option from the context menu. In this way, you will not have to re-enter the serial number.

IMPORTANT: In case of a device stored in the database, the context menu will also include the *Edit record* and *Add rental* options.

Contractor machines

In the context menu of a contractor, a user with the authorisation to generate reports and to access the Service module can generate a *List of devices* report. The system will display a list of device linked with the contractor (directly through the *Company* field in the device record or

indirectly through any service document linked with that contractor). The report will show both database devices and incidental devices (the latter come with their serial numbers in italics). The device list in the report will contain the following columns: *Product name*, *Factory number* and *Serial number*, which is a link to *Device history*.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

IMPORTANT: If you delete a device from the system, all the rentals linked with that device will be deleted too. If the device to be deleted was used in guarantees, contract, service requests or service tasks, these objects will not be deleted from the database, and the deleted device will be displayed in the system as an incidental device.

Adding a rental

The *Service* module of the ITCube system allows you to manage device rentals. Before you can use this function, you need to set up a database of the devices to be rented out. To do so, use the **Service->Add device** option. You will then be able to record machine rentals, view current rentals and use the system's rental calendar. To add a rental, select the **Service->Add rental** option from the top menu of the system. When you select the above option, the ITCube system will open a new window with a form containing the following fields:

- *Subject* (mandatory)
- *Date* (mandatory) - use this field to define the start and end dates of the rental;
- *Device* (mandatory) – use this field to select the device to be rented out. To find the device you wish to rent out, click on the ^ button to go the device search engine. Below the *Device* field, you will find the *Show only available devices* checkbox. If you check this field, the device viewer will display only machines not rented out in the specified timeframe.

IMPORTANT: You can only rent out machines entered in the system using the *Add device* option (you cannot add an incidental device to this form);

- *Worker* (mandatory) - use this drop-down menu to select the person to be responsible for the rental;
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Service request* - a field to associate the form with a service request;
- *Type* - this is a drop-down list with the types of rentals entered in the system using the **Service->Dictionary->Rental type** option;
- *Note*;

- *Owner*(*);
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

IMPORTANT: You may also find additional fields set up during the implementation of the system in the *itcube.ini* file.

For a record to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. If you click on the *Cancel* button, the system will reject all the information you have entered about a particular rental.

Managing rentals

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do so, search for the required rental.

Searching for rentals

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for rentals, use the **Service->Rental list** option. This search form consists of the following columns: *Owner*, *Worker*, *End date*, *Serial number*, *Product*, *Subject* and *Company*.

At the bottom of the rental viewer, you can narrow down the search to a particular type of rental.

Viewing, modifying and deleting rentals

A description of how to view, modify and delete records can be found in a [separate section](#).

Rental calendar

The ITCube system allows you to view rentals easily for a particular month or a particular day. To check such information, use the **Service->Rental calendar** option. The system will open a *Monthly calendar* window with a table showing rentals. Each cell in the table represents one day (the day number is given in the left top corner), and all the rentals set for that day are shown in that cell. In the case of one-day rental, the rental period will be shown next to the name of the rental. However, in the case of a rental spread over a number of days, the details shown include the start time of the rental (on the first day) and the end time (on the last day). The days between the start date and the end date are marked with dots.

The *Monthly calendar* also allows you to add rentals quickly. To add a rental, click on the action button next to the number of the day for which you wish to add the rental. The next step is to

define the hours during which the rental is to be completed and click on the *Add rental* button. The system will open a new window identical with the one opened when you select the **Service->Add rental** option.

At the bottom of the *Monthly calendar*, you will find the following additional fields: *Device*, *Device type*, *Worker* or *Department*.

The monthly calendar also offers the possibility to change the date of objects using Drag & Drop technology (on browsers and operating systems that support this technology)

If you want the system to display a rental calendar for a particular day, select the day from the monthly calendar. The system will remember the values of the parameters displayed at the bottom of the calendar and open a new window with a daily rental calendar.

Using the daily rental calendar, you can also manage rental periods by using the Drag & Drop technology, which is described in the section on **task calendars**.

Exporting service requests

The service module of the ITCube offers a number of reports. One of them is a report on service requests. This can be generated using the **Reports->Service->Service requests export** option. If you select this option, the system will open a new form where you will be able to define what service requests should be included in the report. The first section contains the following fields:

- *Type*;
- *Symbol*;
- *Status*;
- *Coordinator*;
- *Reception date from/to*;
- *Service date from/to*;
- *Service request for* - use this field to narrow down the search results related to a particular product or a product from a specified category;

IMPORTANT: If additional fields have been defined in the service request form as drop-down lists, these fields will automatically be included in the report and displayed in the section below the *Service request for* field.

The second part of the form contains fields you can use to narrow down the search results to a particular contractor. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Group*;

- *Industry;*
- *Status;*
- *Acquisition type;*
- *City;*
- *Region;*
- *Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Owner.*

The last part of the report presents the report results. The following field values are available:

- *Report fields* - this section is about the fields to be displayed in the report;
- *Sort by*– this is a drop-down list you can use to select the column by which the results should be sorted;
- *Report format* – use this list to select one of two values: *Html* or *Csv*. If you select the *Html* value, the report will be a standard web page. If you select the *Csv* value, the report can be opened as an Excel spreadsheet.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the service request is to be included in the export file.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, click on the *Generate* button at the bottom of the form. The system will open a new window with the report.

IMPORTANT: If you select the html report format, you will be able to assign the contractors in the exported field to a project. To do so, you can use the options found next to the *Save* button on the service request export results record.

Exporting guarantees/service contracts

Another report available in the service module is a report on guarantees and service contracts. This can be generated using the **Reports->Service->Guarantees export** option or the **Reports->Service->Contracts export** option. If you select this option, the system will open a new form where you will be able to define what guarantees/service contracts should be included in the report. The first section contains the following fields:

- *Type;*
- *Symbol;*
- *Status;*
- *Coordinator;*

- *Start from/to;*
- *End from/to;*
- *Contract/Guarantee for;*

IMPORTANT: If additional fields have been defined in the guarantee/service contract form as drop-down lists, these fields will automatically be included in the report and displayed at the end of this section.

The second part of the form contains fields you can use to narrow down the search results to a particular contractor. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Industry;*
- *Status;*
- *Acquisition type;*
- *City;*
- *Region;*
- *Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Owner.*

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the guarantee/contract is to be included in the export file.

The last part of the report presents the report results. The following field values are available:

- *Report fields* - this section is about the fields to be displayed in the report;
- *Sort by*– this is a drop-down list you can use to select the column by which the results should be sorted;
- *Report format* – use this list to select one of two values: *Html* or *Csv*. If you select the *Html* value, the report will be a standard web page. If you select the *Csv* value, the report can be opened as an Excel spreadsheet.

When you have defined the criteria for your query, you can proceed to generate the report. To do, click on the *Generate* button at the bottom of the form. The system will open a new window with the report.

IMPORTANT: If you select the *Html* report format, you will be able to assign the contractors in the exported guarantees/service contracts to a project. You can use the options found next to the *Save* button on the guarantees/service contracts export results record.

Exporting service tasks

Another report available in the service module is a report on service tasks. This can be generated using the **Reports->Service->Service tasks export** option. If you select this option, the system will open a new form where you will be able to define what service tasks should be included in the report. The first section contains the following fields:

- *Type;*
- *Status;*
- *Priority;*
- *Performer;*
- *Delegator;*
- *Start from/to;*
- *End from/to;*

IMPORTANT: If additional fields have been defined in the service task form as drop-down lists, these fields will automatically be included in the report and displayed below the *End from/to* field.

The second part of the form contains fields you can use to narrow down the search results to a particular contractor. The following fields can be found in this part of the form:

- *Company* – contractor name;
- *Group;*
- *Industry;*
- *Status;*
- *Acquisition type;*
- *City;*
- *Region;*
- *Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Owner.*

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the service task is to be included in the export file.

The last part of the report presents the report results. The following field values are available:

- *Report fields* - this section is about the fields to be displayed in the report;
- *Sort by*– this is a drop-down list you can use to select the column by which the results should be sorted;

- *Report format* – use this list to select one of two basic values: *Html* or *Csv*. If you select the *Html* value, the report will be a standard web page. If you select the *Csv* value, the report can be opened as an Excel spreadsheet. Additionally, if the ITCube SMS/ICAL module is active, it is possible to export actions to the iCalendar format. After selecting this option, the actions will be saved in a format that can be imported into applications such as Microsoft Outlook or Google (e.g. to transfer the calendar to a mobile device).

When you have defined the criteria for your query, you can proceed to generate the report. To do so, click on the *Generate* button at the bottom of the form. The system will open a new window with the report.

Working with projects

The ITCube system allows you to plan and monitor the performance of long-term business projects. This will make it significantly easier for your personnel to cooperate to achieve the objectives of the project and will standardise your company's processes. Within an open project, the project team can easily exchange information. This helps them to avoid duplicating certain tasks and to monitor multi-stage sales processes. All the tasks completed by the team members are recorded and can be retrieved as a project history. This allows you to verify the status of the project quickly and to ensure that work on the project continues in the absence of any of the project team members. All the necessary options can be found in the **Projects** menu. You can use the options there to open a new project, to view existing projects and to edit project records.

Opening a new project

To open a new project in the ITCube system, use the **Projects->Open project** option. When you have selected this option, the *ITCube* system will display an *Open project* form, where you will be able to set the parameters of the new project. The form contains the following fields to be completed:

- *Name* (mandatory) – use this field to enter the name of the new project. Decide where the new project will also be available as a template when creating new projects;
- *Number* - (unique number) - this field will be completed automatically by the system, using the format set in the *itcube.ini* file (the standard form is YYYY/MM/RR);
- *From/to/days* (mandatory, except for project templates) - use these fields to enter the start and end dates of the project and the actual number of days spent on a project;
- *Template* - use this field to select a project template for a new project. When you create a new project, the project stages information will be copied from the template. The system will calculate new start/end dates of each project stage, using the start date of the new project you are adding. Remember to define the time framework of the project first and to select a project template later. Additionally, if you select a project template, the form of the

project you are adding will be refreshed and all the fields in the form will be filled using information from the project template. Exceptions include the *Date from/to* fields, which are not overwritten to keep the project framework as specified;

- *Coordinator* (mandatory, except for project templates) – use this drop-down list to select the employee to be the coordinator of the project. The *Department* drop-down list additionally allows you to narrow the list of users to those working in the selected department which is useful if you have a large number of employees;
- *Coordinator reminder* - use this drop-down list to decide when the coordinator should be reminded of the start date of the project. Additionally, the system can notify the coordinator of the closing of the project.

IMPORTANT: When creating a new project using a template, you can instruct the system to copy all the tasks from the template to the new project. To do so, check the *Copy tasks from template* option next to the *Save* button. Remember, however, that this process will apply to those stages in the new project which are not closed when you added the project. The tasks copied from the template may have different completion dates. If the *Set project company as task's company field* option has been checked, the *Company field* in tasks will be overwritten by the *Company field* in the project you are creating. The same applies to the *Set project/stage coordinator as task performer* and *Set project/stage coordinator as task delegator field* options.

- *Status* (mandatory) – use this field to define the status of the project. You can choose from the following values of this field: *Inactive*, *Active*, *Closed - success*, *Closed - failure*. The value in the status field determines your authorisation to access the project. If the project has the status of *Closed - success* or *Closed - failure*, this project can be edited and any information can be linked to it only by a person with the authorisation "*Closed - failure*" *projects modification* or "*Closed - success*" *projects modification*. This field can, therefore, be used to prevent access to the whole project easily.
- *Income/Cost*– use these fields to enter the planned revenue and cost related to the project. These values must be entered in the system currency;
- *Company, Contact person* – this allows you to **link the form with a contractor and a contact person**;
- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read, Write and Create history is described in more detail in a **separate section**.

At the bottom of the *Open project* form, there is the *Project additional data* section with additional fields defined during the implementation of the system. It contains the following fields:

- *Street, City, Postal Code, Region, State, Coordinates* - standard editing fields for providing contact information for the project. They include the address and the exact coordinates on

the map. Coordinates can be entered manually or you can use the mechanism to automatically download them from free Open Street Maps servers. In addition, in preview mode, they allow you to present the project location on a map. The City link presents the location on a country plan using Google Maps, the Street link displays the exact address on a city plan using Google Maps;

- *Connected to Companies* – use this window to select the contractor group linked with the project;
- *Connected to Contacts* – use this window to select the contact group linked with the project;
- *Linked with* – use this field to create a logical link between the current project and other projects. The link is a two-way link, which means that it will be used in the project in which it was defined and in each of the projects linked with that project.
- *Dependency*– use this drop-down list to select the stage of a project which must be closed before the project can be edited. In other words, the project cannot be activated or closed before the specified stage of the project is closed. You will also need to define what the closing of a stage is. Is it the *Closed - success* or *Closed - failure* status, or perhaps it does not matter? Note that the value you set may not cover the project coordinator and/or the project owner. Therefore, you will need to check the *Apply to project coordinator* and/or *Apply to project owner* options. However, the default setting is that this value will apply to all users, except for the administrator's account.

When you have completed all the fields and decide that your project is properly described, you need to register the project in the system. To do so, click on the *Save* button at the bottom of the form or cancel the process by selecting the *Cancel* option. Additionally, you can automatically go to a form where you will be able to add a task, information or project stage. To do so, check the appropriate field before you click on the *Save* button.

Defining project stages

Each project can be divided into any number of stages. Additionally, you define one task for each project stage immediately. The task linked with a particular stage will be registered in the system when the stage is activated. Importantly, each project stage can be linked with any subgroup of contractors (as is the case with projects). This is an easy way to narrow down the contractor group in each project stage.

To open the form where you can add a project stage, you can use the *Add project stage* option from the context menu of the project (in the project viewer or in the project view mode). The ITCube system will open a new form with three sections. In the first section, you can enter the following fields:

- *Number* (mandatory) – this is the number of the stage as part of the selected project. The standard setting is 10 plus the highest number in the project. Two or more phases with the same number will be treated by the system as parallel.
- *Name* (mandatory)
- *Coordinator* - use this drop-down list to select the employee to be responsible for the completion of the stage. In addition to the list of employees, you can select the **Project coordinator** option, which is the coordinator of the project. The *Department* drop-down list additionally allows you to narrow the list of users to those working in the selected department which is useful if you have a large number of employees;
- *From/to/days* – the start and end dates of the stage and the actual number of days spent on the stage. You can choose not to enter the two dates if the stage is an inactive stage, but once you enter one of the dates, the other one will be required. Changing the time range of a stage may additionally result in the system asking if you want to automatically move the subsequent stages.
- *Coordinator reminder* - use this drop-down list to decide when the coordinator should be reminded of the start date of the stage.
- *Status* – use this field to define the status of the stage. You can choose from the following values of this field: *Inactive, Active, Closed - success, Closed - failure*;
- *Income/Cost*– use these fields to enter the planned revenue and cost related to the stage in the system currency;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

The *Project stage task* section contains the following fields:

- *Subject* – the subject of the task;
- *Active* button - use this field to decide whether the system should generate a task when a project stage is activated;
- *Date* - use this drop-down list to define the completion date of the task;
- *Performer* - use this drop-down list to select the performer of the task. There are three pre-defined values in this list: **Project coordinator**, **Stage coordinator** and **Stage activator**;
- *Delegator* - use this drop-down list to select the delegating person in respect of the task. There are three pre-defined values in this list: **Project coordinator**, **Stage coordinator** and **Stage activator**;
- *Type*;
- *Priority*;
- *Delegator reminder*;
- *Performer reminder*;
- *Delegator note*.

IMPORTANT: When a project stage is activated, the task is registered in the system, but you can modify the value in the task form. Therefore, the information entered in this section should be seen as default values, which can be modified in the process of adding a task.

The last section contains information on additional fields added during the implementation of the system, i.e. the following section:

- *Connected to Companies* – use this window to select the contractor group linked with the project stage;
- *Connected to Contacts* – use this window to select the contact group linked with the project stage;
- *Dependency* – use this drop-down list to select the stage of a project which must be closed before the stage being added can be edited. In other words, the project stage cannot be activated or closed before the specified phase of the project is closed. You will also need to define what the closing of a stage is. Is it the *Closed - success* or *Closed - failure* status, or perhaps it does not matter? Note that the value you set may not cover the project coordinator and/or the project owner. Therefore, you will need to check the *Apply to project coordinator* and/or *Apply to project owner* options. However, the default setting is that this value will apply to all users, except for the administrator's account. The dependencies between the different project stages will also be displayed graphically in the project calendar. The dependent stages will be connected with an arrow (pointing at the dependent stage) in one of three colours indicating the closing mode. A red arrow will indicate *Closed - failure*, a green arrow will mean *Closed - success*, and a blue arrow will indicate any closing mode.

When you have completed all the mandatory fields, you need to save the changes by clicking on *Save* or cancel the process of adding a project stage by clicking on *Cancel*. If *Update project company list* option is checked the project *Connected to* field will be automatically extended to include to contractors involved in each stage.

Managing projects/stages

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record, correct it and/or change the progress status of the project/stage. To do so, use the **Projects->Project list** or **Projects->Project stage list** option. The system will open a *Project/Project stage list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for projects, use the **Projects->Project list** or **Projects->Project stage list** option. This search form consists of the following columns: *Owner*,

Coordinator, *Start date*, *End date*, *Company/Project*, *Name* and by the *Additional* column, which contains practically all the fields from the project/stage form.

Additionally, at the bottom of the viewer, you can narrow down the record list to records that meet criteria such as *Status* or *Template*. The viewer can display all the projects/stages (if the *All* option is checked), projects based on templates (if the *Projects* option is checked) or only project templates (if the *Templates* option is checked). The *Search for coordinator in stages* setting, available only on project list, instructs the system to search for projects in respect of which the user named in the *Coordinator* column is also the coordinator of one of the stages in the project.

In the first left-hand column (No.), which contains the record number, there is a button you can click to open a handy menu with options such as displaying all details of the project/stage, modifying the details, managing the stages of the project, bookmarking the project, adding a note or task about the project/stage or deleting the project record.

Viewing, editing and deleting projects/stages

A description of how to view, modify and delete records can be found in a [separate section](#).

In the project record view mode, in addition to the standard information entered in the process of adding the project/stage, the system will display a list of all the stages of the project. By clicking on the name of a stage, the system will display all the details of the stage, as well as a full list of all the details linked with that stage. Some of the stages may be marked in grey. This means that such stages are not available to the user because of the *Dependency* mechanism.

Additionally, the *History* section contains the following information: *Notes*, *Tasks*, *Inbox*, *Outbox*, *Mailings*, *Sales/Purchases*, *Income/Costs*, *Guarantees/Contracts* and *Service requests*. You can decide whether the information in the *History* section should be sorted by object type, date or object owner. In addition to the above history display mechanism, there is also a drop-down list that you can use to narrow down the project/stage history to a particular contractor linked with the project.

Below the history details, there is a section with a description of all the file documents and reservations linked with the project/stage. The standard setting is that only recent records in each section are displayed (the number of such records can be set in the *itcube.ini* configuration file). On the right side of each section, there is a *More* link. If you click on it, the system will open a new window with a full list of records (notes, tasks, emails etc.).

IMPORTANT: In the case of projects/stages, whether a record can be edited depends not only on the settings in the *Rights* field, but also on the status of the project. More specifically, a project which is *Closed* may not be edited by a person without proper authorisation.

IMPORTANT: If you delete a project, all the records linked to that project (such as emails, tasks, sales documents, notes, service objects) will be deleted too.

IMPORTANT: Deleting a stage will not mean deleting the records linked with that stage. The records linked with that stage will continue to be linked with the project and displayed in the ITCube system.

Copying contractor/contacts groups between stages

During the project implementation process, in addition to the standard activities such as activating/closing a project stage, you may need to copy contractors or contacts involved in stage to another stage.

A typical example is a project describing a phone-based marketing campaign. The first phase of such a project would most probably be about all the contractors to be phoned. The other phases would involve identifying the customer's interest in the service offered to them. The last phase would, therefore, be a group of companies that have decided to purchase the service. To carry out such a project, the ITCube offers a very useful tool. It is available in the project/stage view mode. To use the tool, click on the *Manage/More* link below the *Connected to* field. If you wish to transfer certain contractors/contacts to one of the available stages, select the records to be transferred and select the target stage in the *Move records to the selected stage* subsection. However, if you wish only to copy certain contractors/contacts to one of the available phases, select the records to be copied and select the target stage in the *Copy records to the selected stage* subsection. Importantly, the selection process can be automatic, if you check the *Check/Uncheck range* field. You will be able to check many records with one click.

When you have selected the required contractors/contacts, confirm your choice by clicking on the *Save* button. However, if you click on *Delete* instead of *Save*, the system will ignore the value in the *Move/Copy records to the selected stage* and delete only the selected records from the stage being edited.

Adding a sales document/purchase document

To add an offer, an order, an invoice or a purchase document linked with a project/stage, left-click on the action symbol next to the record number and select the *Add offer/order/invoice* option or the *Add purchase* option. The ITCube system will open a form identical with the one you use to register a trade document.

Recording an income/cost

At any time, you can record a revenue item or a cost item and link it with the project/stage. To do so, left-click on the action symbol next to the record number and select the *Add income/cost* option. The ITCube system will open a form identical with the one you use to add an income/cost item using the **Trade->Add income/cost** option.

Delegating tasks

You can link a task with any project/stage. To do so, left-click on the action symbol next to the record number and select the *Add/Delegate task* option. The ITCube system will open a form identical with the one you use to delegate a task using the **Tasks->Add/Delegate task** option.

Adding a note

You can link a note with any project/stage. To do so, left-click on the action symbol next to the record number and select the *Add note* option. The ITCube system will open a form identical with the one you use to add a note using the **Notes->Add note** option.

Registering a document/shortcut

You can link a file document with any project/stage. To do so, left-click on the action symbol next to the record number and select the *Add document* or *Add shortcut* option. The ITCube system will open a form identical with the one you use to register a document using the **Files->Add document** or, in the case of file links, the **Files->Add shortcut** option.

Sending correspondence

You can send a letter, an email or a fax about the project/stage at any time. To do so, left-click on the action symbol next to the record number and select the *Send letter* or *Send fax* or *Send email* option. The ITCube system will open a form identical with the one you use to add correspondence using the options available in the main menu of the system. Additionally, the *Project/Stage* field will be set and the project/stage number will be added to the subject line (an email thread tag).

Adding marketing campaign

You can define a marketing campaign within a project/stage at any time. To do this, left-click on the action symbol next to the record sequence number and select *Add email/letter campaign*. The ITCube system will then open a form identical to the one you fill out when adding a campaign using the options available in the system's main menu. In addition, however, the *Project/Stage* field will be set to the appropriate values by default, the *Include project/project stage companies* field will be checked and a special tag with the project and stage number will be added to the subject. This marker allows, in the future, automatic linking of clients' answers creating a separate thread.

Adding a contract/guarantee/service request

At any time, you can add a new contract/guarantee or service request linked with a particular project/stage. To do so, please left-click on the action symbol next to the record number and select the *Add contract*, *Add guarantee* or *Add service request* option. The ITCube system will open a form identical with the one you use to add service objects from the main menu of the system.

Adding a rental

As in the case of other service objects, you can, at any time, add a new rental linked with a particular project/stage. To do so, left-click on the action symbol next to the record number and select the *Add rental* option. The ITCube system will open a form identical with the one you use to register a new rental using the **Service->Add rental** option.

Creating a bookmark

For each project, the bookmark link displayed in the *Main Panel* of the system, in the *Projects* section can be added. To do so, left-click the action symbol next to the record number and select the *Add to bookmarks*. As a result, your most important projects, e.g. those you are involved in, will be displayed in a visible place and made easily available.

Deleting a bookmark

To delete a project bookmark, click on the action symbol to the right of the project name (in the *Main Panel* of the system), select the *Delete bookmark* option and confirm your choice (by clicking on *Yes* in the confirmation window).

Viewing the project calendar

You can view a graphical calendar for your project at any time, showing all the stages of the project. Each stage will be displayed in the calendar only if the start and end date is defined. To view the calendar for your project, left-click on the action symbol next to the record number and select the *Project calendar* option.

The calendar allows you to manage stage periods by using the Drag & Drop technology, which is described in the section on [task calendars](#).

IMPORTANT: The functionality that allows you to manage stage periods using the Drag & Drop technology is not available for those stages for which the start date and/or end date do not fall within the period displayed in the calendar.

Projects calendar

The ITCube system allows you to view all active project in graphical form. If you select the **Projects->Calendar** option, the system will open a new window where you will be able to view your projects broken down by time period. On the left, you will find a description of the project, including the duration of the project, the coordinator's details and the name of the project. By clicking on the project description or the rectangle symbolizing the project, you will be able to open a window where you be able to view all the details of the project.

The calendar allows you to manage projects periods by using the Drag & Drop technology, which is described in the section on [task calendars](#).

IMPORTANT: The functionality that allows you to manage project periods using the Drag & Drop technology is not available for those projects for which the start date and/or end date do not fall within the period displayed in the calendar.

Project reports - profit rankings

The ITCube package offers you many project reporting options. In the profit, interaction or task reports, you can narrow down the reported statistics to a particular project or a group of projects. Project comparison reports are an addition to these analyses. The reports are available in the **Reports->Projects** menu.

The first of the project comparison reports is the profit ranking report, which you can generate by clicking on the **Reports->Projects->Profit ranking** option. When you choose this option, the system will open a form with two sections. The first one contains the following fields:

- *Project start date (from/to)* - use this field to enter the timeframe for the commencement of the project;
- *Project end date (from/to)* - use this field to enter the timeframe for the closing of the project;
- *Project status* – use this field to narrow down the reported projects to projects with the specified status;
- *Project region* – use this field to narrow down the reported projects to projects with the specified region;
- *Order sale date* - use this field to narrow down the report to those sales documents for which the *Sale date* field falls within the defined timeframe;
- *Operator* - if you select this option, the ITCube system will perform statistical profit calculations only and exclusively for the sales documents for which the selected user is the operator;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;
- *Analyze (mandatory)* - use this drop-down menu to select values to be included in a statistical analysis. The following values are available:
 - *Active orders;*
 - *Closed orders;*
 - *Invoices;*
 - *Orders/Invoices;*
 - *Income/costs;*
 - *Sale* – use this option to generate a statistical summary of all the above types;
 - *Total* – use this option to generate a statistical summary of all the profit types as part of the *Sales* option and, additionally, purchase documents. In this mode, you will need to decide whether the costs should also include the purchase price entered in the sales document;

- *Currency* - use this option to select only those records which use selected currency.
- *Sort (mandatory)* - use this drop-down menu do select how the statistics in tabular form are to be sorted.
- *Result limit (mandatory)* - use this drop-down menu to define the number of records to be displayed in the statistics table.

The second part of the form contains fields you can use to group the results. The following fields can be found in this part of the form:

- *Template;*
- *Project;*
- *Owner;*
- *Coordinator;*

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*. The system will display a table where you can compare different project groups in terms of the profit. To make this comparison even easier, all the records will be arranged in the table according to the amount of the profit generated, with the records that meet the criteria set in the *Grouping parameters section* marked in grey.

Project reports - task ranking

The second project comparison report (in this case, it is in terms of the time spent on the tasks as part of the project) is the task ranking report, which you can generate by clicking on the **Reports->Projects->Task ranking** option.

When you choose this option, the system will open a form with two sections: The first one contains the following fields:

- *Project start date (from/to)* - use this fields to enter the timeframe for the commencement of the project;
- *Project end date (from/to)* - use this fields to enter the timeframe for the closing of the project;
- *Project status* – use this field to narrow down the reported projects to projects with the specified status;
- *Project region* – use this field to narrow down the reported projects to projects with the specified region;
- *Task date (from/to)* - use these fields to enter the timeframe for the registered tasks linked with the project;
- *Delegator/Performer* -use this drop-down menu to narrow down the report to tasks delegated or performed by a particular person;
- *Department* - use this field to narrow down the scope of the report to records related to the employees in a particular department;

- *Type* – use this drop-down list to select the required task type;
- *Status* – use this drop-down list to select the required status of the task;
- *Sort (mandatory)* - use this drop-down menu do select how the statistics in tabular form are to be sorted.
- *Result limit (mandatory)* - use this drop-down menu to define the number of records to be displayed in the statistics table.

The second part of the form contains fields you can use to group the results. The following fields can be found in this part of the form:

- *Template*;
- *Project*;
- *Owner*;
- *Coordinator*;

When you have completed all the fields, all you need to do is to generate the statistics by clicking the *Generate* button. If you want to abort the process, click *Cancel*. If you click on the *Generate* button, the system will display a table where you can compare different project groups in terms of the time spent on the tasks as part of each project. To make this comparison even easier, all the records will be arranged in the table according to the amount of the time spent, with the records that meet the criteria set in the *Grouping parameters section* marked in grey.

Exporting projects

Another report available in the project module is the *Projects export* report. This can be generated using the **Reports->Projects->Projects export** option.

The system will open a form where you will be able to define criteria for the inclusion of projects in the report and for the data export format. The first section contains the criteria that a contractor linked with the project must meet :

- Use "*Connected to*" field - this allows you to extend the definition of a contractor linked with the project. The standard setting is the company entered in the *Company* field of the project form. If you have checked this option, it will be every contractor named in the *Connected to* section;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City*;
- *Region*;
- *Country*;
- *Potential*;
- *Acquisition date (from/to)*;

- *Operator*;
- *Owner*.

The second part of the form contains fields you can use to narrow down the search results to the project itself. The following fields can be found in this part of the form:

- *Project start date* - use this field to enter the timeframe for the commencement of the project;
- *Project end date* - use this field to enter the timeframe for the completion of the project;
- *Project status*;
- *Region*;
- *Template*;
- *Owner*;
- *Coordinator*;

IMPORTANT: If any additional fields have been defined as drop-down lists in the project form, these fields will also be available in the above section.

The last part of the report presents the report results. The following field values are available:

- *Report fields* - this section is about the fields to be displayed in the report;
- *Sort by*- this is a drop-down list you can use to select the column by which the results should be sorted;
- *Report format* – use this list to select output format. If you select the *Html* value, the report will be a standard web page. If you select the *Csv* value, the report can be opened as an Excel spreadsheet. In addition, if the integration function with the OpenStreetMap/MapBox environment is activated, it will be possible to select the option of presenting the results on a map.

When you have defined the criteria for your query, you can proceed to generate the report. To do, click on the *Generate* button at the bottom of the form. The system will open a new window with the report.

Exporting data

The ITCube system offers you CSV and HTML data export mechanisms. Below is a description of the reports you can use to export contractors, contact persons, products, tasks and notes.

Exporting contractors

The ITCube system allows you to generate data export reports where the person preparing the report can precisely define the criteria to be met by a record to be included in the report. The first

report is a *Companies export* report, which you can generate using the **Reports->General->Companies export** option.

If you select this option, the system will open a new form which you can use to define the criteria to be met by a contractor to be included in the report. The following fields can be found in this form:

- *Report name* (mandatory) - use this field to enter the name of the criteria set for contractors.
- *Owner* - use this field to decide which users will have access to the report;
- *Company list* - use this field to define contractor enumerative groups. These contractor groups are not set up according to the criteria to be met by its members. Instead, they are made of individual records you specify. The *Company list* field is a list of contractors in such a group. This group may be narrowed down by completing the other fields (e.g. *Industry, Status*). If this field is left empty, the system will assume that the group should be set up based on the parameters defined in the other fields for all records.
- *Company* – contractor name;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City, Region, Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Operator*;
- *Owner*;
- *Last contact* - a set of fields where you can select only contractors contacted with in a specified timeframe. In addition to the timeframe, you can enter the type of entry to be used as the description of the contact with a particular customer.

Example 1. If you wish to select the contractors you have contacted over the last three months ('contacted' means the receipt of an email or the performance of a task related to the contractor) then:

- In the *Last contact* field in the *Contact within the last* subsection select 3 months.
- In the *Notes* field, do not select any value. In the *Tasks* and *Correspondence* fields select *Any type of task* and *Incoming correspondence* respectively.

Example 2. If you wish to select the contractors you have not contacted over the last twelve months ('contacted' means the receipt or sending of an email and a *Call made* note), then:

- In the *Last contact* field in the *No contact within the last* subsection, select *Year*.

In the *Tasks* field, do not select any value. In the *Notes* and *Correspondence* fields select *Call made* and *Any type of correspondence* respectively.

IMPORTANT: Remember that when using a *Contact within the last* subsection, the *Tasks*, *Notes* and *Correspondence* fields are linked using the word *or* however, if you are using a *No contact within the last* subsection, these fields are linked using the word *and*.

- *Project participation* - use this field to narrow down the number of contractors to those who participated in the specified projects. In addition, you can specify whether a particular contractor participated in all the specified projects (the *and* field is checked), or at least one of the projects (the *or* field is checked). Please note that you can also use this field to specify individual stages of each project. If you wish to select a particular project stage, then with the project viewer displayed, go to the context menu of the project and select the *Attach project stage to the form* option. This menu contains a list of all the stages of the project.
- *Features* - use this field to select a number of attributes describing the contractor. In addition, you can specify whether the contractor must have all these attributes (the *and* field is checked), at least one of the attributes (the *or* field is checked) or none of them (the *not* field is checked).
- *Product category* - this field allows you to select a number of product categories that the contractor is interested in. In addition, you can specify whether the contractor is to be interested in all the selected product categories (the *and* field is checked), at least one of them (the *or* field is checked) or none of them (the *not* field is checked).

IMPORTANT: If the contractor additional field definition mechanism is enabled, you can use these fields (if they are drop-down lists) to specify the contractor group you are setting up.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the contractor is to be included in the report you are creating.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, in the *Report format* section, in the *Report fields* field, select the contractor details to be displayed. Additionally, you need to select the column according to which the results should be sorted (the *Sort by* field). You can also select the report format. To do so, use the *Report format* field to decide whether the report is to be displayed in HTML format (as a standard webpage) or in CSV format (the report file will be saved on your disk and can be imported into any program that supports CSV files, e.g. Microsoft Excel). Additionally, if the OpenStreetMap/MapBox integration function is enabled, it will be possible to choose the option of presenting the results on a map.

In the *Report format* field, you can also select the *Labels sheet* option. This option allows you to print contractor address details in a series. For details on how to print address details on envelopes in a series, please refer to [section 18](#).

If you know that the report you are creating will be re-used in the future, you can save its definition in the database. To do so, click on the *Add* button. To access the saved reports, use the *Report preview section*. If the *Add to bookmarks* option was checked when the report was saved, the report can be accessed from the *Main panel* of the system in the *Bookmarks - Report* section.

To generate a saved contractor report, select the name of the report in the *Report preview section* in the *Report name* field and then click on the *Generate* button. In response, the ITCube system will open a new window with a description of the report. In this window, you will still be able to change criteria and columns to be displayed in the report.

IMPORTANT: If you have defined no criteria, the report will be a list of all the contractor records registered in the system for which the user generating the report has the *Read* authorisation.

IMPORTANT: If you have completed the *Range* field, the report will include only the records with numbers within the specified range.

In addition, you can always delete the report definition by selecting the name of a defined report, in the *Report preview section*, in the *Report name* field and clicking on the *Delete* button.

Exporting contact persons

The second report you can generate is the contact person export report, which you can generate using the **Reports->General->Contacts export** option.

If you select this option, the system will open a new form where you will be able to define what contact persons should be included in the report. The following fields can be found in this form:

- *Report name* (mandatory) - use this field to enter the name of the criteria set for contact persons.
- *Owner* - use this field to decide which users will have access to the report;

The following are fields for the contractor linked with the contact person to be included in the report (for details, please see the section on exporting contractors):

- *Company list*;
- *Project participation*;
- *Company* - use this field to enter the name of the contractor;
- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;

- *City, Region, Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Operator;*
- *Owner.*

Parameters regarding directly the contact person:

- *Surname/Name;*
- *Sex;*
- *Age;*
- *Company;*
- *Status;*
- *Acquisition type;*
- *City, Region, Country;*
- *Acquisition date (from/to);*
- *Project participation;*
- *The Last contact, Features and Product category* – these fields are described in detail in the previous section on exporting contractors;
- *Operator;*
- *Owner.*

IMPORTANT: If the additional contact person field definition mechanism is enabled in *itcube.ini* file, you can use these fields (if they are drop-down lists) to specify the contact person group you are setting up.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the contact person is to be included in the report you are creating.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, in the *Report format* section, in the *Report fields* field, select the contact person details to be displayed. Additionally, you need to select the column according to which the results should be sorted (the *Sort by*) field. You can also select the report format. To do so, use the *Report format* field to decide whether the report is to be displayed in HTML format (as a standard webpage), VCARD format (as file to be imported into mobile device contact database) or in CSV format (the report file will be saved on your disk can be imported into any program that supports CSV files, e.g. Microsoft Excel).

In the *Report format* field, you can also select the *Labels sheet* option. This option allows you to print contact person address details in a series. For details on how to print address details on envelopes in a series, please refer to [section 18](#). If you know that the report you are creating will

be re-used in the future, you can record its definition in the database. To do so, click on the *Add* button. To access the saved reports, use the *Report preview* section. If the *Add to bookmarks* option was checked when the report was saved, the report can be accessed from the *Main panel* in the *Bookmarks - Reports* section.

To generate a saved contact person report, select the name of the report in the *Report preview* section, in the *Report name* field and then click on the *Generate* button. In response, the ITCube system will open a new window with a description of the report. In this window, you will still be able to change criteria and columns to be displayed in the report.

IMPORTANT: If you have not defined any criteria, the system will display a list of the contact persons in respect of whom the user generating the report has the *Read* authorisation.

IMPORTANT: If you have completed the *Range* field, the report will include only the records with numbers within the specified range.

You can always delete the contact person report definition. To do so, select the name of the report in the *Report preview* section, in the *Report name* field, and then click on *Delete*.

Exporting notes

Another report you can generate in the ITCube system is a notes export. To generate this report, use the **Reports->General->Notes export** option.

If you select this option, a new form will be opened where you will be able to define the criteria to be met by a note to be included in the report. The criteria in this form are divided into three sections. In the first section, you can define the following:

- *Report name* (mandatory) - use this field to enter the name of the criteria set for notes.
- *Owner* - use this field to decide which users will have access to the report;

The second section allows you to narrow down the report to a particular group of contractors. The following field values are available:

- *Group*;
- *Industry*;
- *Status*;
- *Acquisition type*;
- *City, Region, Country*;
- *Potential*;
- *Acquisition date (from/to)*;
- *Operator*;
- *Owner*.

and the following fields describing the note:

- *Date from/to;*
- *Type;*
- *Company;*
- *Contact;*
- *Subject;*
- *Note;*
- *Project;*
- *Project stage;*
- *Owner.*

IMPORTANT: If the additional notes field definition mechanism is enabled in *itcube.ini* file, you can use these fields (if they are drop-down lists) to specify the notes group you are setting up.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the note is to be included in the report you are creating.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, in the *Report format* section, in the *Report fields* field, select the note details to be displayed. Additionally, you need to select the column according to which the results should be sorted (the *Sort by*) field. You can also select the report format. To do so, use the *Report format* field to decide whether the report is to be displayed in HTML format (as a standard webpage) or in CSV format (the report file will be saved on your disk can be imported into any program that supports CSV files, e.g. Microsoft Excel).

If you know that the report you are creating will be re-used in the future, you can record its definition in the database. To do so, click on the *Add* button. To access the saved reports, use the *Report preview* section. If the *Add to bookmarks* option was checked when the report was saved, the report can be accessed from the *Main panel* of the system in the *Bookmarks - Reports* section.

To generate a saved notes report, select the name of the report in the *Report preview* section, in the *Report name* field and then click on the *Generate* button. In response, the ITCube system will open a new window with a description of the report. In this window, you will still be able to change criteria and columns to be displayed in the report.

Exporting tasks

Another report you can generate in the ITCube system is a tasks export. To generate this report, use the **Reports->General->Tasks export** option.

If you select this option, the system will open a new form where you will be able to define what tasks should be included in the report. The criteria in this form are divided into three sections. In the first section, you can define the following:

- *Report name* (mandatory) - use this field to enter the name of the criteria set for tasks.
- *Owner* - use this field to decide which users will have access to the report;

The second section allows you to narrow down the report to a particular group of contractors. The following field values are available:

- *Contractor;*
- *Group;*
- *Industry;*
- *Status;*
- *Acquisition type;*
- *City, Region, Country;*
- *Potential;*
- *Acquisition date (from/to);*
- *Operator;*
- *Owner.*

And the following task description fields:

- *Date from/to;*
- *Type;*
- *Priority;*
- *Subject;*
- *Status;*
- *Company;*
- *Contact;*
- *Delegator note;*
- *Performer note;*
- *Project;*
- *Project stage;*
- *Delegator;*
- *Performer;*

IMPORTANT: If the additional tasks field definition mechanism is enabled in *itcube.ini* file, you can use these fields (if they are drop-down lists) to specify the tasks group you are setting up.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the task is to be included in the report you are creating.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, in the *Report format* section, in the *Report fields* field, select the task details to be displayed. Additionally, you need to select the column according to which the results should be sorted (the *Sort by*) field. You can also select the report format. To do so, use the *Report format* field to decide whether the report is to be displayed in HTML format (as a standard webpage) or in CSV format (the report file will be saved on your disk can be imported into any program that supports CSV files, e.g. Microsoft Excel).

Additionally, if the SMS/ICAL module of the ITCube system is active, you can export tasks into iCalendar format. If you select this option, the tasks will be saved in a format that can be imported into applications such as Microsoft Outlook or Google (e.g. to transfer your calendar to a mobile device).

If you know that the report you are creating will be re-used in the future, you can record its definition in the database. To do so, click on the *Add* button. To access the saved reports, use the *Report preview* section. If the *Add to bookmarks* option was checked when the report was saved, the report can be accessed from the *Main panel* of the system in the *Bookmarks - Reports* section.

To generate a saved tasks report, select the name of the report in the *Report preview* section, in the *Report name* field and then click on the *Generate* button. In response, the ITCube system will open a new window with a description of the report. In this window, you will still be able to change criteria and columns to be displayed in the report.

Exporting products

Another report you can generate in the ITCube system is a products export. To generate this report, use the **Reports->General->Products export** option.

If you select this option, the system will open a new form where you will be able to define what products should be included in the report. The following parameters can be found in this part of the form:

- *Type;*
- *Category;*
- *Name/Code;*
- *Note;*
- *Catalogue number/EAN number;*
- *Producer;*
- *Supplier;*

- *Coordinator*;
- *Sale price* – this is a drop-down list where you can select the price linked with the criteria defined in the following fields: *Currency*, *Sale price from/to*;
- *Currency*;
- *Sale price from/to* - uses these fields to define the price range of the products to be included in the statistical summary;
- *Purchase price from/to* - uses these fields to define the purchase price range of the products to be included in the statistical summary;
- *Sale made* - use these fields to narrow down the results to products named in a specified timeframe in a specified sales document type;
- *Owner*;
- *Features* - a field that allows you to select several product characteristics. In addition, we can specify whether the product should meet all the features (ticked box *and*) or at least one of them (ticked box *or*).

IMPORTANT: If the additional products field definition mechanism is enabled in *itcube.ini* file, you can use these fields (if they are drop-down lists) to specify the products group you are setting up.

IMPORTANT: If a field is left empty, the system will assume that this field should not determine whether the product is to be included in the report you are creating.

When you have defined the criteria for your query, you can proceed to generate the report. To do so, in the *Report format* section, in the *Report fields* field, select the product details to be displayed. Additionally, you need to select the column according to which the results should be sorted (the *Sort by*) field. You can also select the report format. To do so, use the *Report format* field to decide whether the report is to be displayed in HTML format (as a standard webpage) or in CSV format (the report file will be saved on your disk can be imported into any program that supports CSV files, e.g. Microsoft Excel).

IMPORTANT: If you have not defined any criteria, the system will display a list of the products in respect of which the user generating the report has the *Read* authorisation.

Printing envelope stickers

The ITCube system allows you to print envelope stickers with the address of a contractor or a contact person. You can print either one sticker with the address of a particular person or company, or a series of envelope tickers for a pre-defined group of contractors or contact persons.

Printing a single envelope sticker

To print a sticker with the address of a particular contractor or contact person, select the *Print label* option from the context menu of the contractor or contact person concerned. In response, the system will open a form where you will be able to define the printing parameters. The form contains two sections. The first one (*Page parameters*) contains the following fields:

- *Width/Height*- use these fields to define the width and height of the page on which the stickers are to be printed.
- *Left/Right margin* - use these fields to set the horizontal margins of the page;
- *Top/Bottom margin* - use these fields to set the vertical margins of the page;
- *Font size* - use this field to set the font size;
- *Columns number* - use this field to set the number of columns into which the page is to be divided;
- *Rows number* - use this field to set the number of rows on the page.

In the second section (*Label parameters*), the ITCube system allows you to define the following values:

- *Left/Right margin* - use these fields to set the horizontal margins of the sticker;
- *Top/Bottom margin* - use these fields to set the vertical margins of the sticker;
- *Column/Row* - use these fields to define where on the page the sticker is to be printed;
- *Print country* - use this field to decide whether the name of the contractor's country is to be printed.

IMPORTANT: There are default values for all the fields. These are defined in the *itcube.ini* file.

When you have defined the printing settings, click on the *Generate* button. The system will display a print preview in a window below. Now print the sticker by clicking on the printer icon.

Printing a series of stickers

The ITCube also allows you to print a series of stickers with the addresses of contractors or contact persons. To print a series of stickers, select the **Reports->General->Company export (Reports->General->Contacts export)** option, define the target group of contractors (contact persons), and then select the *Labels sheet* option in the *Report format* section when generating the report. In response, the system will allow you to enter sticker printing criteria. The following field values are available:

- *Width/Height*- use these fields to define the width and height of the page on which the stickers are to be printed.
- *Left/Right page margin* - use these fields to set the horizontal margins of the page;

- *Top/Bottom page margin* - use these fields to set the vertical margins of the page;
- *Left/right label margin* - use these fields to set the horizontal margins of the sticker;
- *Top/bottom label margin* - use these fields to set the vertical margins of the sticker;
- *Additional data* – in this section, you can choose between a business address or a personal address (in the case of a contact person) and decide whether the name of the addressee's country should be printed;
- *Font size* - use this field to set the font size;
- *Columns number* - use this field to set the number of columns into which the page is to be divided;
- *Rows number* - use this field to set the number of rows on the page.

When you have defined the printing settings, click on the *Generate* button. The system will display a print preview in a window below. Now print the stickers by clicking on the printer icon.

Intranet

The ITCube system allows you to simplify and standardise some of your company's processes and activities. More specifically, the options available in the **Intranet** menu allow you, for example, to reserve shared resources, to build internal support, to monitor costs and to manage absences (e.g. holidays, business trips). The *Intranet* module in the *ITCube* system also allows you to exchange information between registered system users formally. Consequently, you can easily notify all the interested persons of an event you consider important and which might affect a project you are working on or your relationship with a particular customer.

Types of absences (*)

As you add a new absence to the system, you can assign a type to it. The standard values in the system can be as follows: *Holiday*, *Sick leave*. You are free to enter other absence types specific to your company. To do so, use the **Intranet->Dictionary->Absence type** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Company resources (*)

Your company's personnel may often need to use different resources to perform their work duties. Such resources may include a company car or a conference room. However, before you can reserve a particular resource, you need to register it in the system. To enter your company's resources, use the **Intranet->Dictionary->Resource** option. When you have selected this option, the *ITCube* system will open a new form, where you will be able:

- to add a resource by completing the *Name*, *Note* field in the *Add dictionary value* window and link the resource with those system users you wish to be able to reserve that resource (the *Rights* field). To add the resource record to the system, click on the *Add* button;

- to change a resource record, by selecting the name of the record to be modified from the drop-down menu in the *Name* field of the *Delete/Change dictionary value* section. The selected resource record will be displayed in the *Delete/Change dictionary value* section, where you will be able to modify it. The change will be saved in the system only if you confirm it using the *Save* button;
- to delete a resource from the system, by selecting the name of the record you wish to delete from the drop-down menu in the *Name* field of the *Delete/Change dictionary value* section and clicking on the *Delete* button.

IMPORTANT: Users are allowed to reserve only resources marked as active.

Types of reservations (*)

To define reservation types, use the **Intranet->Dictionary->Reservation type** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

Internal support topics (*)

Internal support within your company is a very useful way to manage your knowledge resources. If it is well-designed, it can save you time or even replace training, for new employees. Before you start building your internal support structure, you need to define support topics. To do so, select the **Intranet->Dictionary->Support topic** option.

A detailed description of how to manage dictionaries can be found in a [separate section](#).

IMPORTANT: It is impossible to set a default value in the support topics dictionary.

Entering a new notice

One way to notify a large number of people of the occurrence of an event is the use of notices. When you add a notice to the system, the notice will be available to other users of the system, on the *Noticeboard* section of the *Main panel*. To enter a notice, use the **Intranet->Add notice** option.

If you select this option, the system will open a new *Add notice* form. You can use it to define all the parameters of the new notice. The following fields are available:

- *Subject*;
- *Date from/to* (mandatory) - use these fields to enter the period during which the notice will be published;
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);

- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Note*;
- *Sale/Purchase* – use this field to link the notice to a sales or purchase document;
- *Owner(*)*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

IMPORTANT: Note that the *Read* authorisation in respect of a notice will not replace the authorisations for the files linked with the notice. Therefore, it is possible that a user is able to access a notice, but will not be able to open all the files linked with the notice.

For a record to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. If you click on the *Cancel* button, the system will reject all the information you have entered.

Managing notices

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record or correct it. To do so, use the **Intranet->Notice list**. The system will open a *Notice list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for notices, use the **Intranet->Notice list** option. This search form consists of the following columns: *Owner, Date, Company, Subject, Note* and by the *Additional* column, which contains practically all the fields from the notice form.

At the bottom of the notice search engine, you can decide whether the system should display only the notices registered in the Intranet (the *Intranet* option is checked) or only Extranet notices (the *Extranet* option is checked), or all notices (the *All* option).

Viewing, editing and deleting notices

A description of how to view, modify and delete records can be found in a [separate section](#).

Defining internal support content

To define your internal support content, use the **Intranet->Internal support** option. If this option is selected by the administrator or a user with the authorisation to create internal support content, the support content already registered in the system will be displayed in the edit mode.

To add a new item (i.e. a question/answer item) to a particular topic, click on the button on the left side of the topic and, from the context menu, select the *Add internal support record* option. A form with the following fields will be opened:

- *Help topic* - a drop-down list of help topics that the edited entry is related to.
- *Question* – this field will be displayed on the list of records linked with a particular topic. This field contains the question to which your employee needs the answer.
- *Answer* – this field contains a detailed answer to the question entered in the previous field. The value of this field will be displayed if you click on the link indicating the question in the list of records linked with the topic;
- *Files* - this field contains links to files which are an addition to the answer.
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

IMPORTANT: The list of records will be displayed in alphabetical order. If you wish the records to be displayed in a specific order, include a number before the actual question.

IMPORTANT: To display a list of records linked with a particular topic, click on the name of the topic.

If necessary, the record can be modified or deleted. To delete or edit a record, click on the button on the left side of the name and select the required option.

Viewing internal support content

To view the support content, use the **Intranet->Internal support** option. If you select this option, the support content will be displayed in a read-only mode. The support content is divided into the main groups of topics and the related records. Both the topics and the related records are, by default, sorted alphabetically. You can change the order of the records linked with one of the main topics by selecting an appropriate option in the *Sort by* section at the top of the window. You can choose from options such as the *Insert date* or the record *Owner*. Additionally, that section contains mechanisms to help you easily find the answer to your question. You can search the internal support by *Topic* or by a phrase contained in a question or answer.

Income/Costs

To make the most of what the ITCube offers, it is necessary to understand the route of a particular intranet cost:

- To enter a cost, use the **Intranet->Add income/cost** option.
- All records containing descriptions of your cost requests will be added to a special table you can open using the **Intranet->Income/Cost added list** option. You can also use that option to check what decision your superior has made about a particular request. At the same time, the addition of a cost item will be communicated to the requestor's immediate superior (the *Costs to be approved* section in the *Main Panel* of the system);

- All the costs you have the right to approve (i.e. records entered by your subordinates) will be added to a special table you can open using the **Intranet->Income/Cost to be approved list** option. You can also use that option to approve or reject the costs.

IMPORTANT: If the user entering a cost in the system has no superior and the control mechanism is not enabled, and if the user does not manually name an approver, the cost added by that user will be approved by the system automatically.

Adding a new cost for approval

To add a new cost, use the **Intranet->Add income/cost** in the system menu. The system will open a new form you can use add a cost and automatically notify your superior of that to enable them to approve or reject the cost. The *Add income/cost* form contains the following fields:

- *Approver* - this is a drop-down list where you can name the person responsible for approving the record. If the person adding the record has superior named in the system, and the approval option is active, the system will fill in the field automatically.
- *Subject* (mandatory)
- *Worker* (mandatory) – this is a drop-down list you can use to select the employee linked with the cost being added;
- *Reg./Proc. date* (mandatory) - the registration date and processing date related to the cost being added;
- *Income/Cost* (mandatory) - use these fields to enter the amount of the income or cost item;
- *Currency* - the currency of the *Income/Cost* fields;
- *Payment/Shippment*;
- *Company, Contact person* – this allows you to **link the form with a contractor and a contact person**;
- *Project, Project stage* – this allows you to **link the form with a project and a project stage**;
- *Files* - this field allows you to add files. A description of how to do this can be found in a **separate section**;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a **separate section**.

When you have completed the above fields, click on the *Save* button to add your request to a list of costs waiting for your superior's decision. At the same time, the system will automatically notify the requester's immediate superior of the addition of the request by adding a link to the *Main Panel* in the *Costs to be approved* section. To register more than one record with similar values, check the *Add income/cost* before clicking on the *Save* button. In such a case, when the current record has been saved, the system will take you back to the form where you will be able to add a new income/cost item. This form will be auto-populated.

Costs added

All records with descriptions of the expected costs generated by a particular user will immediately be added to a special table containing a list of the added costs. To access the table, use the **Intranet->Income/Cost added list** option in the system menu. You can also use this option to check the decision made by your superior about a particular cost.

Searching for data

When you have selected this option, a list of all the costs added by the user logged in to the system will be loaded. Each cost in the ITCube system can be assigned the following statuses:

- Approved;
- Rejected;
- No decision.

When viewing the list of records with costs, you will find three selection fields at the bottom of the table (*Approved, Rejected, No decision*), where you need to select the required cost status.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for costs according to the following columns: *Owner, Worker, Date, Approver, Subject, Contractor* and *Additional*.

Viewing, modifying and deleting added costs

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If the superior's control option is active for you and if you modify a cost already approved, that cost will automatically be assigned the *No decision* status.

Costs to be approved

All records with descriptions of the expected costs waiting for your approval will immediately be added to a special table. You can view the table by selecting the **Intranet->Income/Cost to be approved list** option from the system menu. Additionally, the system will remind you of the costs in respect of which you have not made a decision, by displaying links to such costs in the *Main Panel (Costs to be approved)*.

Searching for data

When you have selected the **Intranet->Income/Cost to be approved list** option, a list of all the costs waiting for your approval will be loaded.

When viewing the list of records with the costs for which you are/were supposed to make a decision whether to approve them or not, you will find three selection fields at the bottom of the table (*Approved, Non-approved, No decision*).

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for costs for approval according to the following columns: *Owner, Worker, Date, Approver, Subject, Company* and *Additional*.

Viewing, modifying and deleting costs for approval

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: Depending on the status of the record, the number of options available may be different. Records not approved/rejected (the *No decision* status) can be viewed, approved or rejected. Users without the administrator's authorisations will only be able to view records with costs already approved or rejected.

Approving a cost

If a record has not been approved or rejected yet, a user authorised will be able to approve the record at any time. To do so, please left-click the action symbol next to the record number and select the *Approve income/cost* option. When you have confirmed your decision, the status of the cost will be assigned the *Approved* status irrevocably (this can only be corrected by the system administrator).

Rejecting a cost

If a record has not been approved or rejected yet, a user authorised will be able to reject the record at any time. To do so, please left-click the action symbol next to the record number and select the *Reject income/cost* option. When you have confirmed your decision, the status of the cost will be changed to the *Rejected* status irrevocably (this can only be corrected by the system administrator).

Absences

To make the most of what the ITCube offers, it is necessary to understand the route of a particular absence:

- To enter an absence, use the **Intranet->Add absence** option.
- All records containing descriptions of your absence requests will be added to a special table you can open using the **Intranet->Absence added list** option. You can also use that option to check what decision your superior has made about a particular request. At the same time, the addition of an absence will be communicated to the requestor's immediate superior (the *Absences to be approved* link in the *Main Panel* of the system);

- All the absences you have the right to approve (i.e. records entered by your subordinates) will be added to a special table you can open using the **Intranet->Absences to be approved list** option. You can also use that option to approve or reject the absences.

IMPORTANT: If the user entering an absence in the system has no superior and the control mechanism is not enabled, and if the user does not manually name an approver, the absence added by that user will be approved by the system automatically.

Adding a new absence

To add a new absence, use the **Intranet->Add absence** option in the system menu. The system will open a new form you can use add an absence and automatically notify your superior of that to enable them to approve or reject the absence. The *Add absence* form contains the following fields:

- *Subject (mandatory)*
- *Type;*
- *Date (mandatory)* – use this field to set the start/end dates of the absence using the system calendar or manually. Using calendar has additional advantage, that it presents in graphical way workload (small, medium, big) of logged user for particular days in context of chosen absence type;
- *Worker (mandatory)* - this a drop-down menu where you can select the person to be absent;
- *Approver* - this is a drop-down list where you can name the person responsible for approving the record. If the person adding the record has superior named in the system, and the approval option is active, the system will fill in the field automatically.
- *Deputy* - a drop-down list in which you indicate the person who, during the period of absence, is to take over the duties (for example, acceptance of offers/purchases/costs/absences/mailings, etc.) of the person indicated in the Worker field;
- *Series/To* - use these fields to enter a series, i.e. absences related to many users or absences repeated periodically. If you select the *Multiuser* value in the first field, the *Worker* field will be changed to display multiple values. If you select a periodic series, the frequency of repeating the absence (daily, weekly, monthly etc.) will be defined in this field. If you select the daily basis, the system will also allow you to specify the days of the week. The *To* field contains the completion date of the series period;
- *Company, Contact person* – this allows you to **link the form with a contractor and a contact person;**
- *Project, Project stage* – this allows you to **link the form with a project and a project stage;**
- *Files* - this field allows you to add files. A description of how to do this can be found in a **separate section;**
- *Owner(*);*
- *Note;*

- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

In the *Add absence* form, it is possible to fill in additional fields defined during the implementation of the system. You can only view this section if the additional absences field addition mechanism is enabled in *itcube.ini* file. When you have completed the above fields, click on the *Save* button to add your request to a list of absences waiting for your superior's decision. At the same time, the system will automatically notify the requester's immediate superior of the addition of the request by adding a link to the *Main Panel* in the *Absences to be approved* section.

Absences added

All records with descriptions of the expected absences generated by a particular user will immediately be added to a special table containing a list of the added absences. To access the table, use the **Intranet->Absence added list** option in the system menu. You can also use this option to check the decision made by your superior about a particular absence.

Searching for data

To search for absences, use the **Intranet->Absence added list** option. This search form consists of the following columns: *Owner, Worker, Date, Approver, Type, Subject* and *Company*.

At the bottom of the absences search engine, you can select the status of the absence (there are three options to choose from: *Approved, Rejected, No decision*).

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section.

Viewing, modifying and deleting added absences

A description of how to view, modify and delete records can be found in a [separate section](#).

IMPORTANT: If the superior's control option is active for you and if you modify an absence record already approved, that absence will automatically be assigned the *No decision* status.

Absences to be approved

All records with descriptions of the expected absences generated by a particular user and are waiting for approval will immediately be added to a special table. You can view the table by selecting the **Intranet->Absence to be approved list** option from the system menu. Additionally, the system will remind you of the absences in respect of which you have not made a decision, by displaying links to such absences in the *Main Panel* (the *Absences to be approved* section).

Searching for data

When you have selected this option, a list of all the absences waiting for approval by the user logged in to the system will be loaded. Each absence in the ITCube system can be assigned the following statuses:

- Approved,
- Rejected,
- No decision.

When viewing the list of records with the absences for which you were are/were supposed to make a decision whether to approve them or not, you will find three selection fields at the bottom of the table (*Approved, Rejected, No decision*), where you need to select the required absence status.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section.

Viewing, modifying and deleting absences for approval

A description of how to view, modify and delete records can be found in a [separate section](#).

Approving an absence

If an absence record has not been approved or rejected yet, a user authorised to approve or reject the record will be able to approve the record at any time. To do so, please left-click the action symbol next to the record number and select the *Approve absence* option. When you have confirmed your decision, the status of the absence will be changed to the *Approved* status irrevocably (this can only be corrected by the system administrator).

Rejecting an absence

If an absence record has not been approved or rejected yet, a user authorised to approve or reject the record will be able to reject the record at any time. To do so, please left-click the action symbol next to the record number and select the *Reject absence* option. When you have confirmed your decision, the status of the absence will be changed to the *Rejected* status irrevocably (this can only be corrected by the system administrator).

Reserving company resources

To reserve a company resource, use the **Intranet->Add reservation** option. The system will then open a new window with a form containing the following fields:

- *Subject* (mandatory);
- *Date* (mandatory) - use this fields to define the start and completion dates of the reservation;

- *Resource* (mandatory) – use this drop-down menu to select the resource to be reserved (if you have the authorisation to reserve that resource). Next to that field, there is a mechanism you can use to narrow down the resource list to those available in a particular period of time (the *Date* field);
- *Worker* (mandatory);
- *Type*;
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);
- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

Important: If you try to reserve a particular resource for a period for which the same resource is already reserved, even if only for part of the period, the system will not accept your reservation and display an alert.

When you have defined all the parameters of your reservation correctly, click on the *Save* button to confirm it or the *Cancel* button to abort the process of adding the reservation.

Managing reservations of company resources

All records containing reservations of company resources are sent to a special table. You can view the table by selecting the **Intranet->Reservation list** option from the system menu. When you select this option, the system will open a form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for reservations in the following columns: *Owner, Worker, Date, Resource, Type, Subject, Company*.

Viewing, modifying and deleting resource reservations

A description of how to view, modify and delete records can be found in a [separate section](#).

Reservation calendar

The ITCube system allows you to view reservations easily for a particular month or a particular day. To check such information, use the **Intranet->Reservation calendar** option. The system will open a *Monthly calendar* window with a table showing your reservations for different days.

Each cell in the table represents one day (the day number is given in the left top corner), and all the reservations set for that day are shown in that cell. In the case of one-day reservations, the reservation period will be shown next to the name of the reservation. However, in the case of a reservation spread over a number of days, the details shown include the start time of the reservation (on the first day) and the end time (on the last day). The days between the start date and the end date are marked with dots.

The *Monthly calendar* also allows you to add a reservation quickly. To reserve a resource, click on the action button next to the number of the day for which you wish to add the reservation. The next step is to define the hours during which the reservation is active and click on the *Add reservation* button. The system will open a new window identical with the one opened when you select the **Intranet->Add reservation** option.

At the bottom of the *Monthly calendar*, you will find the following additional fields: *Resource*, *Type*, *Worker* and *Department*. These fields allow you to view reservations of a particular resource, a type of resources or reservations made by other ITCube system users.

The monthly calendar also offers the possibility to change the date of objects using Drag & Drop technology (on browsers and operating systems that support this technology)

If you want the system to display the reservation calendar for a particular day, select the day from the monthly calendar. The system will remember the values of the *Resource*, *Type*, *Worker* and *Department* parameters and open a new window with a daily resource calendar.

Using the daily reservation calendar, you can also manage reservation periods by using the Drag & Drop technology, which is described in the section on **task calendars**.

IMPORTANT: The functionality also allows you to manage reservation periods using the Drag & Drop technology is not available for multi-day reservations.

Extranet

One of the latest ways of selling that has been growing fast thanks to computer networks is distance selling, i.e. through online stores. You can set up an online store also using the ITCube system, which offers you the necessary tools to set up and manage your online point of sale. However, the ITCube system offers you much more than an ordinary online store. The *Extranet* module allows you to create a new customer communication channel.

Apart from selling, you can use this module to communicate with contractor groups by using a noticeboard, allowing your contractors access to your company's documents and allowing them to monitor the progress of your work on their orders. Additionally, if you have the *Service* module,

the Extranet module will allow your customers to send service requests and to monitor the progress of the requests. All the options related to the *Extranet* module are available in the **Extranet** menu and can be used by the system administrator and all users with the authorisation *Access to Extranet module*.

Extranet contact forms (*)

The ITCube system allows you to add contact forms to Extranet pages. Each such form will be available to any person using the Extranet module, in the *Registration* section.

Adding a new extranet contact form

To add a new form type to the system, use the **Extranet->Dictionary->Contact form** option. When you choose this option, the system will open a small window where you will be able to enter the name of the new form. As the name you enter will be visible to any person using your Extranet pages, it would be good for the name to reflect the nature of the form, e.g. it can be a question you would like the person visiting your Extranet page to answer.

IMPORTANT: The list of available forms will be displayed in alphabetical order. If you would like the new form to be the default form displayed, check the *Default value* option.

When you have completed all the fields, click on the *Add* button or cancel the addition of the form by clicking on the *Cancel* button.

Modifying/Deleting extranet contact forms

The system administrator may, at any time, modify the name of any form or delete the form from the system. To modify a form record, select the name of the record from the drop-down menu in the *Name* field of the *Delete/Change dictionary value* section and correct the selected fields appearing below and click on the *Save* button. To delete the record, click on the *Delete* button.

Contact form submitted list

To view the enquiries submitted through your page by Internet users, using your contact forms on your Extranet page, use the **Extranet->Contact form list** option. When you select this option, the system will display a list of all the forms (in alphabetical order) together with lists of the enquiries made using each form. Each enquiry is identified by the name and address of the contractor. If you wish to view all the details of a contractor, use the button to the left of the enquiry and select the *Register company* option from the context menu. This will allow you to view all the details of the enquiry and to instruct the system to register the contractor in the ITCube database automatically. If you do not want to register the contractor in the system, select the *Delete record* option from the context menu.

Preview mode

If you select the **Extranet->Preview mode** option, the system will open a new window with a form where you can log into the Extranet module. That is the way our contractors are going to perceive it.

About us/Configuration

If you select the **Extranet->About us/Configure** option, the system will display a new form where you will be able to configure the appearance and parameters of the *Extranet* module. The form is divided into two sections. The first one can be used to enter the information to be displayed in the *About us* section of the Extranet module. A detailed description of the window used to add HTML content can be found [in the Annex](#).

IMPORTANT: If the multi-language option in the Extranet module is activated, you will be able to add information to the *About us* section in more than one language version. To do so, you can use the list of languages at the bottom of the window.

The other section is used to define additional parameters. It contains the following fields:

- *Title* – use this field to define the title of your website to be displayed at the top bar of your Internet browser;
- *Keywords*– use these fields to enter the keywords that search engines can use to assign your website to the right thematic category;
- *Keywords note* - use this field to provide a brief description of the website. This description will be used by search engines;
- *Display home category* - use this field to define whether the main category should be displayed in the Extranet module;
- *Login type* - this field allows the Extranet owner to decide whether access to the online store's resources should be allowed to a particular representative of your contractor only after they log into the system (the *Login required* option) or without completing the login process (the *Login not required* option). In the other, non-login case, any person will be able to access the Extranet site. In this case, however, the Extranet user will not be able to place orders, read notices, view file documents etc. This means that the Extranet can be used only as a way to present the company's products/services.
- *User (e-mail)* - selection of the user from whose e-mail account Extranet notifications will be sent. The system can send notifications about new service request, orders and forms completed in the Extranet module. This account will also be used to send e-mails with a generated new password to a user who has forgotten his password.

You need to confirm all the settings you have entered. To do so, use the *Save* button.

Home page

The **Extranet->Home page** option allows you to design the home (or main) page of the Extranet module. You can use this option to add a graphic file or formatted text to the page. A detailed description of the window used to add HTML content can be found [in the Annex](#). When you have finished adding content, you will need to save the new page by clicking on the *Save* button. You can always cancel the process by clicking on the *Cancel* button.

IMPORTANT: If the multi-language option in the Extranet module is activated, you will be able to add information to the *Home page* section in more than one language. To do so, you can use the list of languages at the bottom of the page.

Terms & Conditions

An important aspect of your communication with customers is to have a set of terms and conditions governing the operation of your online store. The ITCube system allows you add such terms and conditions to the Extranet site you are building. To add your terms and conditions, use the **Extranet->T&C page**. The system will then open a window identical with the one you need to complete when adding content to the home page. A detailed description of the window used to add HTML content can be found [in the Annex](#). When you have finished adding content, you will need to save the new page by clicking on the *Save* button. You can always cancel the process by clicking on the *Cancel* button.

IMPORTANT: If the multi-language option in the Extranet module is activated, you will be able to add information to the *T&C* section in more than one language. To do so, you can use the list of languages at the bottom of the form.

Entering a new extranet notice

One way to notify a large number of people of the occurrence of an event is the use of notices. When you add a notice to the system, the notice will be available to contractors, on the Extranet noticeboard. To enter a notice, use the **Extranet->Add notice** option. If you select this option, the system will open a new *Add notice* form. You can use it to define all the parameters of the new notice. The following fields are available:

- *Subject* (mandatory)
- *Date from/to* (mandatory) - use these fields to enter the period during which the notice will be published;
- *Read* - use this field to define the group of contractors to be allowed to read the notice you are adding.
- *Files* - this field allows you to add files. A description of how to do this can be found in a [separate section](#);

- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);
- *Sale/Purchase* – this allows you to link the form with a sale or purchase document;
- *Owner(*)*;
- *Note*;
- *Rights* - the section where you can assign the authorisation to Read and Write is described in more detail in a [separate section](#).

For a record to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. If you click on the *Cancel* button, the system will reject all the information you have entered.

Extranet notice list

A user with the necessary authorisations within the ITCube system in respect of a record (i.e. the user is a member of the relevant group) may, at any time, view that record and, where necessary, correct it. To do use, use the **Extranet->Notice list**. The system will open a *Notice list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for extranet notices, use the **Extranet->Notice list** option. This search form consists of the following columns: *Owner, Date, Company, Subject, Note* and by the *Additional* column, which contains practically all the fields from the notice form.

At the bottom of the notice search engine, you can decide whether the system should display only the notices registered in the Intranet (the *Intranet* option is checked) or only Extranet notices (the *Extranet* option is checked), or all notices (the *All* option).

Viewing, editing and deleting Extranet notices

A description of how to view, modify and delete records can be found in a [separate section](#).

Extranet order/offer request list

A user with the required authorisations in the ITCube system may, at any time, view all the orders or offers requests entered using the online store mechanism and to register or reject each such trade document in the system. To do so, use the **Extranet→Order/Offer list** option. When you choose this option, the system will open an *Extranet order/offer request list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for extranet orders or offers request, use the **Extranet->Order/Offer list** option. This search form consists of the following columns: *Date, Company, Contact person, Type*.

Managing extranet orders/offer requests

In the browser, in the first column from the left, which contains the sequence number of the record, there is also an action button, which opens a context menu. Using this menu, the system user has access to options such as viewing the full content of information, acceptance (registration in the system) and deletion of the record.

Approving extranet orders/offer requests

You can approve a particular order or offer request at any time. To do so, please left-click the action symbol next to the record number and select the *Approve* option. The system will open a new window identical with the one opened when you select the **Trade->Add order/offer** option. Additionally, all the fields will be auto-populated with information from the Extranet order/offer request. This form allows you to edit the order/offer details easily. The last step of the approval process is to click on the *Save* button. When you click on this button, the record will automatically be transferred to the system's table, which you can access by selecting the **Trade->Orders list** or **Trade->Offers list** option.

Viewing and deleting extranet orders or offer requests

A description of how to view and delete records can be found in a [separate section](#).

Extranet service request list

A user with the required authorisations in the ITCube system may, at any time, view all the service requests entered using the Extranet module and to register or reject each such request in the *Service* module. To do so, use the **Extranet->Service requests list** option. When you choose this option, the system will open an *Extranet service requests list* form where you can perform all the necessary tasks.

Searching for data

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. To search for extranet service requests, use the **Extranet->Service requests list** option. This search form consists of the following columns: *Date, Company, Contact person, Subject*.

Managing extranet service requests

In the order viewer, in the first left-hand column, which contains the record number, there is a button you can click to open a handy menu with options such as displaying the entire request, approving the request (registering it in the system) or deleting the request record.

Approving extranet service requests

You can approve a particular service request at any time. To do so, please left-click the action symbol next to the record number and select the *Approve service request* option. The system will open a new window identical with the one opened when you select the **Service->Add service request** option. Additionally, all the fields will be auto-populated with information from the extranet service request. This form allows you to edit the request details easily. The last step of the request approval process is to click on the *Save* button. When you click on this button, the record will automatically be transferred to the system's table, which you can access by selecting the **Service->Service request list** option.

Viewing and deleting extranet service requests

A description of how to view, modify and delete records can be found in a [separate section](#).

Event history

All the things that visitors to your website do on it are recorded in the system's database and can be viewed. Use the **Extranet->Session history** option to view the extranet event history. When you choose this option, the system will open a *Session history* form with the following columns:

- *No.* - contains the record number;
- *Date* - contains the date and time of the event;
- *Company* - this is the name of the contractor;
- *Contact person* - this contains the full name of the person who generated the event.;
- *Additional information* - this column contains detailed additional information regarding the event.

At the bottom of the form, you can define the type of the event. Examples include login, order addition or product viewing.

The administrator will be able to delete events older than a specified date. As the system will normally gather a large amount of information about events, this operation should be performed at certain intervals, e.g. annually.

Managing electronic mail

The ITCube system allows you to send electronic mail and offers advance email campaign tools. It can be be integrated with email clients, e.g. MS Outlook or Thunderbird. You can use this functionality of the system to archive important, both sent and received electronic messages.

Using the graphic design database when typing an email

Before you start typing an email, it seems reasonable to create a database of graphics designs you can later use in your emails. To manage your graphic designs, select the **System->Graphics repository** option. A detailed description of this option can be found in [system options section](#).

Email templates

If you wish to make sending emails faster, the ITCube system allows you to create email templates. Templates may include your email signature or an advertising email. To create a new email template or to update an existing one, select the **Mail/Fax->Template->Email template** option. The system will open an *Email template* form, where you will be able:

- to add a new template, by entering its name in the *Name* field, to set it as a *Private template* (available to the file owner only) or a *Public template* (available to any user). The next step is to enter the subject, add attachments and the text of the template, and give it the right format. To do this, you need to use the icons you will find directly above the edit field. A detailed description of this field can be found in [a separate section](#). Now you can add your template by clicking on the *Save* button at the bottom of the form;
- to modify an existing template, first by selecting the name of the template you wish to modify. Then modify/update the name, type and design of the template. The change will be saved in the system only if you confirm it using the *Save* button;
- to delete a template, by selecting the name of the template you wish to delete from the drop-down menu in the *Template* field and clicking on the *Delete* button.

IMPORTANT: In the template, you can use certain variables. These will be replaced by entries when you are sending your email. The set of available variables includes: *!Company_Name!*, *!Company_Country!*, *!Company_City!*, *!Company_Postcode!*, *!Company_Street!*, *!Contact_Surname!*, *!Contact_Name!*, *!Contact_Name_Declension!*, *!Contact_Title!*, *!Contact_Position!*, *!Contact_Division!*, *!Contact_City!*, *!Contact_Postcode!*, *!Contact_Street!*, *!Contact_Country!*, *!Date!*, *!Date_Time!*.

Editing and sending emails

To create and send a new email, use the **Mail/Fax->Send email** option. The system will open a *Send email* form, where you will be able to define all the settings of your new email. The *From* field of the message will be filled automatically with your email address (the *Email address* field in your user profile). This form contains the following fields:

- *Marker/Confirmation* - field that allows you to graphically mark your correspondence and additionally set the "acknowledgement of receipt" flag;
- *Company, Contact person* – this allows you to link the form with a contractor and a contact person;
- *Project, Project stage* – this allows you to link the form with a project and a project stage;
- *Sale/Purchase* - this drop-down menu can be used to link an email with a sale or purchase document. Additionally by clicking on the attachment icon next to the field you can attach a PDF printout of the given document;
- *Service request* – use this field to link the record with the history of a service request. Additionally by clicking on the attachment icon next to the field you can attach a PDF printout of the given document;
- *Subject*;
- *Address* (mandatory) – the recipient's e-mail address;

IMPORTANT: If you modify the *Company* and/or the *Contact person* field, the *Address* field will be filled with the value taken from the contractor/contact person form. To be able to use the email sending mechanism efficiently and comfortably, remember to enter email addresses in the process of creating contractor and contact person records.

IMPORTANT: If a value is selected in the *Project/Stage/Sale/Service* fields, depending on the settings in the *itcube.ini* file, the *Subject* field can be supplemented with the numbers of the above objects. The numbers will be added at the end of the subject and enclosed by special characters. This will ensure that future replies to our correspondence will be automatically bundled with the corresponding objects - as long as the person replying to our email does so using the "Reply" function and does not manually remove the tags.

- *CC* - this is the email address to which a carbon copy of the email will be sent;
- *Date* – use this field to define the date of sending the email. The default value is the current time;
- *Files* - use this field to add attachments to your email. Adding files to forms is described in a separate section;
- *Content* – use this field to enter the text of your message and to format it. To do this, you need to use the icons you will directly above the field. A detailed description of this field can be found in a separate section;

IMPORTANT: You can save your email as a *Draft*. If you do so, you will later be able to edit the message. As long as your email is set as a *Draft*, the ITCube system will not send it.

When you have defined all the required settings, you are ready to send your email. If you click on the *Send* button, the email will be sent. If you select the *Cancel* option, you will be taken back to the *Main Panel* without taking any action.

Email history - outbox

Any user of the ITCube system may, at any time, view all the emails they have sent. To use the system's email search tool, select the **Outbox (e-mail)** option in the **Mail/Fax** system menu. The system will then open a new window with a table containing the full email history.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for emails in the outbox according to the following columns: *Owner*, *Date*, *Company/Contact person*, *Subject* and the *Additional* column containing email addresses.

Apart from the standard search mechanisms, there are four buttons at the bottom of the form. These buttons divide all the emails into four groups: *Draft*, *Waiting* (emails waiting to be sent), *Sent* and *Archive* (emails are normally archived after one month). This will help you use the email database more efficiently.

At the bottom of the form, there are also the *Not linked (company)* and *Not linked (project)* fields, where you can find only those emails which could not be linked automatically with a particular contractor, contact person or project.

Viewing sent emails

A description of how to view records can be found in a [separate section](#).

Resending/Requeuing saved emails

Any email saved in the outbox can be resent at any time to its recipient (for example, when you find out that the email was not received when sent for the first time). To send the same email again, select the *Requeue* option from the context menu of the email. To send a new email which content is based on the other email select *Resend* or *Forward* option.

Printing saved emails

Each email can be printed as a report containing the message content and key address details. To generate such a report, select the *Print* option from the context menu of the email.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

Email history - inbox

Any user of the ITCube system may, at any time, view all the emails received. To use the system's email archive, select the **Inbox (e-mail)** option in the **Mail/Fax** system menu. The system will then open a new window with a table containing all the emails received.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for emails in the inbox according to the following columns: *Owner*, *Date*, *Company/Contact person*, *Subject* and the *Additional* column containing email addresses.

Apart from the standard search mechanisms, there are three buttons at the bottom of the form. They divide all the emails into three main groups. Emails not yet read (*New*), emails read (*Read*) and emails entered into the system such a long ago that they were sent to the *Archive* (emails are normally archived after one month). This will help you use the received email database more efficiently and more easily. At the bottom of the form, there are also the *Not linked (company)* and *Not linked (project)* fields, where you can find only those emails which could not be linked automatically with a particular contractor, contact person or project.

Viewing received emails

A description of how to view records can be found in a [separate section](#).

Sending replies

If you wish to send a reply to an email, use the *Reply* or *Reply to all* option. The system will open a form identical with the one that is available when you select the *Send email* option. However, this form will be auto-populated so that you do not need to enter the contractor's/contact person's email address or to complete the *Subject* field. Additionally, the email once sent will be added to the list of replies linked with the email. The system also offers you the *Reply to all* option. The difference between this option and the previous one is that the reply will be sent also to the email address entered in the *CC* field.

Editing links

The *Edit links* option allows you to change the subject of a received email and to link it with a particular company/contact person or project/stage. Additionally it can be used to link a received email with a sale/purchase document or a service request or to change the priority setting of the email. When you have edited the links, you can also automatically proceed to add a note or a task by selecting the *Add note* or *Add task* options respectively.

Binding with a question

If you wish to mark an email you have received as the reply to a question asked in an email you had sent, select the *Bind with question* item. The system will display the outbox and allow you to select the email to be bound. When you have selected an email or the *Bind with answer* option from the context menu, the newly opened window will be closed automatically.

Marking an email as read

If you wish to set a particular email as a read email, select the *Mark as read* option. Remember that as long as the inbox contains at least one email that is not marked as read, the system will inform you in the *Main Panel* that your inbox contains new emails.

Marking all new emails as read

If you wish all your emails with the *New* status to be marked as read, all you need to do is to select the *Mark all records as read* option from the context menu.

Printing an email

Each received email can be printed as a report containing the message content and key address details. To generate such a report, select the *Print* option from the context menu of the received email.

Deleting a record

A description of how to delete records can be found in a [separate section](#).

Managing faxes

The ITCube system allows you to communicate with your contractors or contact persons not only by electronic mail, but also by fax. The fax module enables you to send and receive faxes, to view them later and to link them with contractors or contact persons. Faxes can be sent using the selected Email2Fax server (e.g. eFaks.pl). Faxes can be received using the selected Email2Fax server (e.g. eFaks.pl) or by importing PDF files from a selected directory. The other case is when you have a traditional fax machine that can receive faxes and archive them in PDF format. The fax module allows you to view all the fax messages linked with a particular contractor.

Fax templates

If you wish to make sending faxes faster, the ITCube system allows you to create fax templates. The process is the same as in the case of [email templates](#).

Editing and sending faxes

To create and send a new fax, use the **Mail/Fax->Send fax** option. The system will open a *Send fax* form with the following fields:

- *Priority*;
- *Company, Contact person* – this allows you to [link the form with a contractor and a contact person](#);
- *Project, Project stage* – this allows you to [link the form with a project and a project stage](#);

- *Sale/Purchase* - this drop-down menu can be used to link a fax with a sale or purchase document. Additionally by clicking on the attachment icon next to the field you can attach a PDF printout of the given document;
- *Service request* - use this field to link the record with the history of a service request. Additionally by clicking on the attachment icon next to the field you can attach a PDF printout of the given document;
- *Subject*;
- *Number* (mandatory) - use this field to enter the recipient's fax number;

IMPORTANT: If you modify the *Company* and/or the *Contact person* field, the *Recipient's number* field will be filled the value taken from the contractor/contact person form. To be able to use the fax sending mechanism efficiently and comfortably, remember to enter fax numbers in the process of creating contractor and contact person records.

- *Date* - use this field to enter the date of sending the fax;
- *Files* - this is the most important field that allows you to add files to be sent by fax. The type of files you will be able to send will depend strictly on the Email2Fax server you use. In most cases, the PDF and DOC files as well as PNG and JPG graphic formats are supported. Adding files to forms is described in [a separate section](#);
- *Content* - use this field to provide an additional text description. A detailed description of how to edit and format this field can be found in [a separate section](#). Depending on the Email2Fax server you use, this text (description) can be either added to the files added to the fax or ignored. However, in most cases, this text will be ignored, and the Email2Fax server will look at your files (attachments) only. In such a case, this field can be used only to add a description for your internal use.

When you have defined all the required settings of your fax, click on the *Send* button. The fax will be sent. Similarly, if you select the *Cancel* option, you will be taken back to the *Main Panel* of the ITCube system without taking any action.

Faxing file documents

To send a PDF, DOC or JPG format file by fax directly from the file document viewer, select the *Send via fax* (this option is available in the context menu of the document only for files with the specified extensions). The system will then open a window where you will be able to define the settings of your fax message.

Fax history - outbox

Any user of the ITCube system may, at any time, view all the faxes they have sent. To use the system's fax archive, select the **Outbox (fax)** option in the **Mail/Fax** system menu. The system will then open a new window with a table containing the full fax history.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for emails in the outbox according to the following columns: *Owner*, *Date*, *Company/Contact person*, *Subject* and the *Additional* column containing fax receiver number.

Apart from the standard search mechanisms, there are four buttons at the bottom of the form. These buttons divide all the faxes into four groups: *Draft*, *Waiting* (faxes waiting to be sent), *Sent* and *Archive* (faxes are normally archived after one month.). This will help you use the fax database more efficiently.

At the bottom of the form, there are also the *Not linked (company)* and *Not linked (project)* fields, where you can find only those faxes which are not linked with a particular contractor, contact person or project.

Viewing sent faxes

A description of how to view records can be found in a [separate section](#).

Resending/Requeuing saved faxes

Any fax saved in the outbox that has not been sent correctly (e.g. no Internet connection with the Email2Fax server) can be resend. To send the same fax again, select the *Requeue* option from the context menu of the email. To send a new fax which content is based on the other fax select *Resend* option.

Modifying fax details

At any time, you can modify the fax details, such as contractor, contact person, project, project stage, sale/purchase, service request or priority. To modify a fax record, left-click on the action button next to the record number and select the *Edit links* option.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

Fax history - inbox

Any user of the ITCube system may, at any time, view all the faxes received. To use the system's fax archive, select the **Inbox (fax)** option in the **Mail/Fax** system menu. The system will then open a new window with a table containing all the fax received.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section. You can search for faxes in the inbox according to the following columns: *Owner*, *Date*, *Company/Contact person*, *Subject* and the *Additional* column containing sender number.

Apart from the standard database search mechanisms, there are three buttons at the bottom of the form. They divide all the faxes into three main groups. Faxes not yet read and most probably not yet linked with an addressee and a recipient (*New*), faxes already read (*Read*) and faxes entered into the system such a long ago that they were sent to the *Archive* (faxes are normally archived after one month). This will help you use the received fax database more efficiently and more easily.

At the bottom of the form, there are also the *Not linked (company)* and *Not linked (project)* fields, where you can find only those faxes which are no linked with a particular contractor, contact person or project.

Viewing received faxes

A description of how to view records can be found in a [separate section](#).

IMPORTANT: The system will be able to display fax messages correctly only if file viewing software that supports PDF and TIFF formats is installed on your computer.

Sending replies

If you wish to send a reply to a fax, use the *Reply* option. The system will open a form identical with the one that is available when you select the *Send fax* option. Additionally, the fax once sent will be added to the list of replies linked with the fax.

Binding a fax to a question

If you wish to mark a fax you have received as the reply to a question asked in a fax you had sent, select the *Bind with question* option. The system will display the outbox and allow you to select the fax to be bound. When you have selected a fax or the *Bind with answer* menu option, the newly opened window will be closed automatically.

Marking a fax as read

If you wish to set a particular fax message as a read fax, select the *Mark as read* option. Remember that as long as the inbox contains at least one fax that is not marked as read, the system will inform you in the *Main Panel* that your inbox contains new faxes.

Marking all new faxes as read

If you wish all your faxes with the *New* status to be marked as read, all you need to do is to select the *Mark all records as read* option from the context menu.

Deleting a record

A description of how to delete records can be found in a [separate section](#).

Managing marketing campaign

The ITCube system allows you to use two types of marketing campaign. The first one is a mailing, i.e. an email message sent to groups of contractors and/or contact persons. The other type is a mail series, i.e. printing letters and addressing envelopes in a series.

Groups of contractors in marketing campaign

To use the system's marketing campaign functionality, you need to define groups of recipients first. Such groups can include contractors as well as contact persons. Both groups will be used to create marketing campaign.

Adding a contractor group

Before you can start sending correspondence to groups of contractors, you need to define such groups in the system first. To do so, select the **Mail/Fax->Marketing campaigns->Company group** option and fill in a form containing the following fields:

- *Group name* (mandatory) – use this field to enter the name of the group. This name will be used by the system to identify the group;
- *Owner*– use this field to authorise a user to use the group you are defining when the user is adding marketing campaign;

Below is a list of criteria you can set to decide whether a particular contractor is to be included in the group. The form where you can set such criteria is identical with the one that is used to export contractors, and this is described in detail in [a separate section](#).

When you have defined the criteria for your query, you can proceed to save your contractor group in the system. To do so, click on the *Add* button.

Viewing and deleting contractor groups

To view a defined contractor group, select the name of the group from the drop-down menu in the *Group name* field (in the *Group preview section*) and click on the *Preview* button. Similarly, to delete a contractor group, select the name of the group and click on the *Delete* button.

Groups of contact persons in marketing campaign

The other type of groups you can use for marketing campaign is contact person groups. To create a contact person group, select the **Mail/Fax->Marketing campaigns->Contact group** option.

Adding a contact person group

If you select this option, the system will open a new form where you will be able to define the criteria for what contact persons should be included in your group. The following fields can be found in this form:

- *Group name* (mandatory) – use this field to give a unique name to your group;
- *Owner* – use this field to authorise a user to use the group you are defining when the user is adding marketing campaign;

Below is a list of criteria you can set to decide whether a particular contact person is to be included in the group. The form where you can set such criteria is identical with the one that is used to export contact persons, and this is described in detail in [a separate section](#).

When you have defined the criteria for your query, you can proceed to save your contact person group in the system. To do so, click on the *Add* button.

Viewing and deleting contact person groups

To view a defined contact person group, select the name of the group from the drop-down menu in the *Group name* field (in the *Group preview* section) and click on the *Preview* button. Similarly, to delete a contact person group, select the name of the group and click on the *Delete* button.

Marketing campaign cycle

For a good understanding of how marketing campaigns are created and distributed in the system, you need to look at how they move between users and how users can use them. To put it very briefly, the process is as follows:

1. Any user (with the authorisation *Marketing campaign management*) can create a new email campaign using the **Mail/Fax->Marketing campaigns->Add email campaign** option or a new letter campaign by selecting the **Mail/Fax->Marketing campaigns->Add letter campaign** option;
2. The system user that is the superior of the person that created a campaign (i.e. that user is activated in the system as an *Approver* of that person or was named manually by the person that added the campaign) will be notified of that by the system (a note will be available in *Campaigns to be approved* in the *Main Panel*);
3. That superior will decide what to do and whether to approve or reject the campaign using *Approve campaign* or *Reject campaign* option;
4. Any user waiting for their superior's decision can, at any time, check the status of campaign by selecting the **Mail/Fax->Marketing campaigns->Campaign added list** option;
5. An approved email campaign will be sent on the date set in the *Date* field. An approved letter campaign contractor/contact links will be generated instantly;
6. Each campaign will be added to the contractor/contact person and project/stage history.

To create a new campaign, use the **Mail/Fax→Marketing campaigns->Add email campaign** option or **Mail/Fax→Marketing campaigns->Add letter campaign** option. When you select one of the two options, the system will open an *Add marketing campaign* form, where you will be able to define all the settings of your new email/letter campaign. This form contains the following fields:

- *Date* (mandatory) – use this field to define the date of sending the email correspondence;

IMPORTANT: The system will not send the group correspondence before it is approved.

- *Approver* - this is a drop-down list where you can name the person responsible for approving the record. If the person adding the record has superior named in the system, and the approval option is active, the system will fill in the field automatically.
- *Name* – use this field to define the name of the group correspondence;
- *Subject* – use this field to enter the subject of the message;
- *Project, Project stage* – this allows you to **link the form with a project and a project stage**;
- *Contractor group* – use this field to select the contractor groups where the message is to be sent.
- *Include project/project stage companies* - field visible only when the PROJECTS module is active. Allows to extend recipients database with companies connected to a project or stage through their field *Connected to*. If a particular stage is indicated, a set of companies is taken from the stage form. If no stage is indicated, the set of companies is retrieved from the project form.

IMPORTANT: The system also allows you select more than one contractor group. To do so, click hold down the *CTRL* button and check the names of the groups.

- *Contact group* – use this field to select the contact person groups where the message is to be sent.
- *Include project/project stage contacts* - field visible only when the PROJECTS module is active. Allows to extend recipients database with contact persons connected to a project or stage through their field *Connected to*. If a particular stage is indicated, a set of contacts is taken from the stage form. If no stage is indicated, the set is retrieved from the project form.

IMPORTANT: The system also allows you select more than one contact person group. To do so, hold down the *CTRL* button and check the names of the groups.

IMPORTANT: If a contractor/contact person is named in more than one of the selected groups, the system will make sure that the message you are adding is sent to that contractor/contact person only once.

- *Files* - this field allows you to add attachments. A description of how to do this can be found in [a separate section](#);

IMPORTANT: In the case of letter campaign, the value of this field is used only as additional information.

- *Content* – use this field to enter the text of your message and to format it. To do this, you need to use the icons you will see directly above the field. For more information about text formatting, refer to [the Annex](#).

IMPORTANT: To create a personalised correspondence, you can use the following dynamic variables: *!Company_Name!*, *!Company_Country!*, *!Company_City!*, *!Company_Postcode!*, *!Company_Street!*, *!Contact_Surname!*, *!Contact_Name!*, *!Contact_Name_Declension!*, *!Contact_Title!*, *!Contact_Position!*, *!Contact_Division!*, *!Contact_City!*, *!Contact_Postcode!*, *!Contact_Street!*, *!Contact_Country!*, *!Date!*, *!Date_Time!*. When sending/generating a group email/letter, the ITCube system will replace these variable with actual values taken from the database.

IMPORTANT: You can save your campaign as a *Draft*. If you do so, you will later be able to edit the message. The system will not send the correspondence until it is a draft.

For a marketing campaign to be entered in the system, you must approve it by clicking on the *Save* button at the bottom of the form. Similarly, if you click on the *Cancel* button, the system will reject all the information you have entered.

Viewing marketing campaigns

Any user may, at any time, view campaigns and check the status of each. To do so, select the **Mail/Fax->Marketing campaigns->Campaign added list** option or the **Mail/Fax->Marketing campaigns->Campaign to be approved list**.

Each campaign message can be assigned one of the following statuses:

- draft (a working copy);
- no decision (waiting for the superior's decision);
- approved;
- rejected;
- sent.

When viewing the list of records with the campaign messages you have added to the system, you will find five selection fields at the bottom of the table with statuses. Select one these for your campaign. Depending on the selected status, the options available to the user will be adjusted. For example, records for email/letter campaign not approved by your superior cannot be edited or deleted.

IMPORTANT: If the user that added a campaign to the system has no superior or the option that allows the user's superior to control that user was not activated in the process of creating the user's profile, the campaign added by the user will be approved automatically.

A detailed description of the data search mechanisms can be found in the [Searching, viewing, editing and deleting data](#) section.

Managing marketing campaigns

In the campaign viewer, in the first left-hand column (No.), there is a button you can click to open a handy context menu with options such as displaying the full details of the campaign, approving/rejecting the campaign, display a progress report on the messages or deleting the record.

Viewing a campaign

A description of how to view records can be found in a [separate section](#).

Modifying a campaign

Each campaign can, at any time, be edited. To do so, please left-click the action symbol next to the record number and select the *Edit links* or *Edit record* option (depending on the message status). For the change to be saved, you must approve it by clicking on the *Save* button at the bottom of the form. Similarly, if you click on the *Cancel* button, the system will reject all the changes you have entered.

Approving a campaign

To approve a marketing campaign, find the record for the campaign, and then left-click the action symbol next to the record number and select the *Approve campaign* option.

Rejecting a campaign

To reject a marketing campaign, find the record for the campaign, and then left-click the action symbol next to the record number and select the *Reject campaign* option.

Displaying a campaign report

You can check a progress report on each campaign you have sent. To do so, please left-click on the action symbol next to the record number and select the *View report* option. The report will not

only display the names of the individuals or companies where the message has been sent, but will also generate a list of those where the message could not be sent.

Deleting a record (*)

A description of how to delete records can be found in a [separate section](#).

MULTILINGUAL Module

Multilingual Interface is a module dedicated to companies that communicate with customers or internally in multiple languages.

The extension enables seamless switching between the Polish and English system interfaces. It also allows the preparation of an individual language version of the interface.

In addition, the module offers the possibility of automatically translating selected information from the CRM system database into one of the languages supported by the DeepL API platform. This is currently one of the leading solutions for translation based on artificial intelligence. The module includes the following functions:

- Translation of selected fields on the NOTE form (*Subject, Description*),
- Translation of selected fields on the TASK form (*Subject, Delegator description, Performer description*),
- Translation of selected fields on the TRADE DOCUMENT form (*Subject, Contractor note, Operator note, Note, Summary*),
- Translation of the *Subject* field and the highlighted part of the MAIL/LETTER content,
- Translation of the *Question* field and the highlighted part of the answer for the internal Knowledge Base item.

The price of the module does not include the fees associated with the paid version of the DeepL API platform, which allows monthly limits to be increased beyond those available in the free version.

CTI Module

The ITCube system can be integrated with telephone switchboard. It can be integrated with any switchboard that comes with a TAPI 1'st page driver (TAPI is a global standard for communication with a telecom environment).

The CTI module of the ITCube system offers the following functions:

- Dial a number - this function allows you to dial a phone number directly from the ITCube application. To make a call to a contractor or a contact person, click on the phone number link;
- Caller identification - this function allows you to identify the caller and to display the caller's details entered in your CRM system before you take the call. The caller will be identified using the information contained in the contractor/contact person database so that the caller is identified precisely. The system will also provide you with a list of the actions you can perform in respect of the contractor/contact person (e.g. *Add task, Add note, Send letter* etc.);
- Use the functions of the telephone switchboard - once you start a phone call, the system allows you to use a number of useful functions. They include, in particular:
 - starting/ending the call (using a hands-free set);
 - transferring your call;
 - place the call on hold / remove the call from hold.

The availability of the above functions will depend mostly on the driver provided by the manufacturer of the telephone switchboard.

IMPORTANT: Some TAPI controllers may not offer all these functions, in which case you will not be able to use them in the system.

REPORTS module

ITCube reports is a solution for customers that require more than the system's standard analytical tools. The module offers them:

- an advanced graphical reporting environment that allows you to export data into PDF format and to copy reports to external applications (e.g. MS Excel, MS Word);
- A set of 65 ready-to-use reports prepared in response to the more frequent suggestions from customers;

The ITCube REPORTS module is divided into a few groups: **General, Trade, Projects, Service, Users, Tasks, Notes**. Below is a description of all the reports grouped thematically.

General reports

- **Company/Industry** - this report contains a quantitative breakdown of contractors by industry. The information is presented using a table and a bar graph. The parameters in this reports are: *Acquisition date, Operator, Status, Group* and *Region*.

- **Company/Group** - this report contains a quantitative breakdown of contractors by group. The information is presented using a table and a bar graph. The parameters in this reports are: *Acquisition date, Operator, Status* and *Region*.
- **Contractors/Region** - this report contains a quantitative breakdown of contractors by region. The information is presented using a table and a bar graph. The parameters in this reports are: *Acquisition date, Operator, Status* and *Group*.
- **Contractors/Status** - this report contains a quantitative breakdown of contractors by contractor status. The information is presented using a table and a bar graph. The parameters in this reports are: *Acquisition date, Operator, Group* and *Region*.
- **Documents/Types** - this report contains a quantitative breakdown of documents by type (extension). The information is presented using a table and a pie chart. The parameters in this reports are: the timeframe during which the documents to be analysed were added to the system.
- **Reservation chart** - this report contains a schedule of reservations made in respect of a selected shared resource. The information is presented using a table and a Gantt chart. The parameters in this report include the *Acquisition date* for the contractor and the related *Operator, Status, Group, Region* and the reservation-related parameters: *Date, Worker, Department, Type* and *Resource*.
- **Session log/Hour** - this report presents daily workload in the system (presented for each hour). The workload information includes the number of display events, edition events, modification events, deletion events and record addition events. The information is presented using a table and a bar graph. The parameters of the this include: timeframe, worker and department.
- **Session log/Day of week** - this report presents weekly workload in the system (presented for each day). The workload information includes the number of display events, edition events, modification events, deletion events and record addition events. The information is presented using a table and a bar graph. The parameters of the this include: timeframe, worker and department.
- **Session log/Worker** - this reports contains workload statistics for all employees. The workload information includes the number of display events, edition events, modification events, deletion events and record addition events. The information is presented using a table and a bar graph. The parameters of the this include: timeframe and department.

Trade reports

Each trade analysis report contains the following parameters:

- parameters relating to the contractor linked with a particular document: *Acquisition date, Operator, Status, Group and Region*.
- parameters relating to a particular sales/purchase document: *Date, Operator, Department, Product category and Type* (multiple-choice fields).

- **Offer/Funnel** - this report shows the number of offers, the capital in the offers and the profit margin for each phase of the offer. The information is presented using a table and a bar graph.

- **Offer/Product** - this report ranks products according to the quantity of items offered. In addition to quantity, the report shows the profit and profit margin in respect of each product. The information is presented using a table and a bar graph.

- **Sale/Month** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by month. The information is presented using a table and a bar graph.

- **Sale/Year** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by month. The information is presented using a table and a bar graph.

- **Sale/Industry** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by contractor industry. The information is presented using a table and a bar graph.

- **Sale/Group** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by contractor group. The information is presented using a table and a bar graph.

- **Sale/Potential** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by contractor potential level. The information is presented using a table and a bar graph.

- **Sale/Region** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by region. The information is presented using a table and a bar graph.

- **Sale/Department** - this report shows the number of sales documents, the amounts of the documents and the related profit margins broken down by department. The information is presented using a table and a bar graph.

- **Sale (No)/Product** - this report ranks products according to the quantity of items sold. In addition to quantity, the report shows the profit and profit margin in respect of each product. The information is presented using a table and a bar graph.
- **Sale (Gain)/Product** - this report ranks products according to the sales profit earned in respect of each product. In addition to profit information, the report shows the profit and profit margin in respect of each product. The information is presented using a table and a bar graph.
- **Sale (Margin)/Product** - this report ranks products according to the profit margin in percentage terms. In addition to profit margin information, the report shows the number of items sold and the profit earned. The information is presented using a table and a bar graph.
- **Sale (No)/Category** - this report ranks product categories according to the quantity of items sold. In addition to quantity, the report shows the profit and profit margin in respect of each product category. The information is presented using a table and a bar graph.
- **Sale (Gain)/Category** - this report ranks product categories according to the sales profit earned in respect of each product category. In addition to profit information, the report shows the number of items sold the profit margin in respect of each product category. The information is presented using a table and a bar graph.
- **Sale/Product type** - this report ranks product types according to the sales profit earned from each type. In addition to profit information, the report shows the number of items sold and the profit margin in respect of each product type. The information is presented using a table and a bar graph.
- **Purchase/Month** - this report shows the number of purchase documents and the amounts of the documents broken down by month. The information is presented using a table and a bar graph.
- **Offer list/Worker** - this report shows a list of offers linked with your company's employees. For each employee, the report also shows the total value of offers added to the system. The information is presented using a table.
- **Sale List/Company** - this report shows a list of sales documents linked with particular contractors. For each contractor, the report also shows the total value of the documents linked with them. The information is presented using a table.

- **Sale list/Worker** - this report shows a list of sales documents linked with particular employees. For each employee, the report also shows the total value of documents added to the system. The information is presented using a table.
- **Purchases list/Company** - this report shows a list of purchase documents linked with particular contractors. For each contractor, the report also shows the total value of the purchases linked with them. The information is presented using a table.

Project reports

Each project analysis report contains the following parameters:

- parameters relating to the contractor linked with a particular project: *Acquisition date, Operator, Status, Group and Region*.
- parameters relating to the project: *Start date/end date, Coordinator, Department, Template and Status* (multiple-choice field).
- **Project chart** - this report shows a project schedule for a specified period of time. The information is presented using a table and a Gantt chart.
- **Project/Sale** - this report ranks projects by sales profit. In addition to profit information, the report shows the profit margin in respect of each project. The information is presented using a table and a bar graph.
- **Coordinator/Sale** - this report ranks coordinators according to the profit earned in respect of their projects. In addition to profit information, the report shows the profit margin generated by each such project. The information is presented using a table and a bar graph.
- **Project/Effectiveness** - this report shows a list of projects and an effectiveness coefficient. "Effectiveness coefficient" means the number of companies involved in the project in relation to the number of those which placed at least one order/invoice as part of the project. The information is presented using a table and a bar graph.
- **Project/Expected effectiveness** - this report shows a list of projects and an expected effectiveness coefficient. "Expected effectiveness coefficient" means the number of companies involved in the project in relation to the number of those which were made at least one offer as part of the project. The information is presented using a table and a bar graph.
- **Project/Companies** - this report shows a list of projects, including project stages, and the number of companies involved in the key project and each project stage. Additionally,

for each stage, a coefficient is shown being the number of companies involved in the project in relation to the initial contractor group linked with the key project. The information is presented using a table.

- **Project/Sale list** - this report shows a list of sales documents linked with particular projects. For each project, the report also shows the total value of documents added to the system. The information is presented using a table.

Service reports

For each report with an analysis of service documents, there are certain parameters relating to the contractor linked with a particular activity/task. They include *Acquisition date*, *Operator*, *Status*, *Group* and *Region*. In the case of an analysis of service tasks, there are also the following parameters relating to the service task: *Date*, *Delegator*, *Performer*, *Performer's department*, *Type*, *Status* (multiple-choice field). In the case of an analysis of service requests, the following parameters are available: *Date*, *Receptionist*, *Coordinator*, *Coordinator's department*, *Type* and *Status*.

- **Product/Service task** - this report ranks products according to the number of service tasks completed and the time spent on them. The information is presented using a table and a bar graph.
- **Product/Service request** - this report ranks products according to the number of service requests linked with them. The information is presented using a table and a bar graph.
- **Category/Service task** - this report ranks product categories according to the number of service tasks completed and the time spent on them. The information is presented using a table and a pie chart.
- **Category/Service request** - this report ranks product categories according to the number of service requests linked with them. The information is presented using a table and a pie chart.
- **Worker/Service task (Gain)** - this report shows a list of service tasks completed by each system user. For each user, the report will show the total revenue and profit related to the service tasks completed by the user. The information is presented using a table and a bar graph.
- **Worker/Service task (Time)** - this report shows a list of service tasks completed by each system user. For each user, the report will show the total time related to the service

tasks completed by the user. The information is presented using a table and a bar graph.

- **Service tasks list** - this report shows a list of service tasks completed by each system user, grouped by completion date. The information is presented using a table.
- **Worker/Service request (Gain)** - this report shows a list of service requests where the coordinators are individual system users. For each user, the report will show the total revenue, cost and profit related to the service requests completed. The information is presented using a table and a bar graph.
- **Service request list** - this report shows a list of service requests managed by each system user, including a list of the products covered by each request. The information is presented using a table.
- **Sale list/Service request** - this report shows a list of service requests managed by each system user. For each service request, the system will show a list of all the orders/invoices linked with the request, plus the total figures. The information is presented using a table.

User reports

- **Absence chart** - this report shows a schedule of absences in respect of a named employee. The information is presented using a table and a Gantt chart. The parameters in this report include the *Acquisition date* for the contractor and the contractor-related parameters *Operator, Status, Group, Region* and the absence-related parameters: *Date, Worker, Department, Type*.
- **Delayed task list** - this report shows a schedule of delayed tasks for each employee. The information is presented using a table. The parameters in this report include the *Acquisition date* for the contractor and the contractor-related parameters *Operator, Status, Group, Region* and the task-related parameters: *Date, Delegator, Performer, Performer's department, Type*.
- **Worker/Task status** - this report shows task statistics for each employee. For each employee, the report will show a breakdown, in percentages, of all the tasks assigned to them, plus the status of each task. The information is presented using a table and a bar graph. The parameters in this report include the *Acquisition date* for the contractor and the contractor-related parameters *Operator, Status, Group, Region* and the task-related parameters: *Date, Delegating person, Performer, Performer's department, Type*.
- **Worker/Offers** - this report shows a list of employees, including the value and number of the offers added. The information is presented using a table and a bar graph. The

parameters in this report include the *Acquisition date* for the contractor and the contractor-related parameters *Operator, Status, Group, Region* and the offer-related parameters: *Date, Operator, Operator's department, Product category, Type*.

- **Worker/Sale** - this report shows a list of employees, including the value and number of the sales documents added. The information is presented using a table and a bar graph. The parameters in this report include the *Acquisition date* for the contractor and the contractor-related parameters *Operator, Status, Group, Region* and the sales document-related parameters: *Date, Operator, Operator's department, Product category, Type* (multiple-choice field).
- **Worker/Session** - this report shows a list of employees and the time spent working in the system, plus the average session length. The information is presented using a table and a pie chart. The parameters of this report include: *Timeframe* and *Department*.
- **Worker/System activity** - this report shows a list of employees and the number of records added to the system by them. The records added to the system are divided into types (e.g. Companies, Contact persons, Tasks, Notes, Emails, Offers, Sales documents, Files). The information is presented using a table. The parameters of this report include: *Timeframe* and *Department*.
- **Worker/System workload**- this report shows a list of employees and the number of records logically linked with them in the system (i.e. those for which they are responsible). The records under analysis are divided into types (e.g. Companies, Contact persons, Tasks, Notes, Emails, Offers, Sales documents, Files). The information is presented using a table. The parameters of this report include: *Timeframe* and *Department*.

Task reports

Each task analysis report contains the following parameters:

- parameters relating to the contractor linked with a particular task: *Acquisition date, Operator, Status, Group* and *Region*.
- parameters relating to the task: *Date, Delegator, Performer, Performer's department, Type, Status* (multiple-choice field).
- **Task/Industry** - this report shows the number of tasks completed for contractors in specific industries. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.

- **Task/Group** - this report shows the number of tasks completed for contractors in specific groups. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.
- **Task/Region** - this report shows the number of tasks completed for contractors representing specific geographical regions. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.
- **Task/Status** - this report shows the number of tasks completed for contractors with specific statuses. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.
- **Task/Company (No)** - this report shows the number of tasks completed for specific contractors. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.
- **Task/Company (Time)** - this report shows the total time spent on tasks completed for specific contractors. Additionally, the report will show the number of the tasks and the average time spent on them. The information is presented using a table and a bar graph.
- **Task/Worker (No)** - this report shows the number of tasks completed by specific employees of the company. Additionally, the report will show the total/average time spent on the tasks. The information is presented using a table and a bar graph.
- **Task/Worker (Time)** - this report shows the total time spent on tasks completed by specific employees of the company. Additionally, the report will show the number of the tasks and the average time spent on them. The information is presented using a table and a bar graph.
- **Task list** - this report shows a list of tasks grouped by completion date. The information is presented using a table.

Note reports

Each note analysis report contains the following parameters:

- parameters relating to the contractor linked with a particular note: *Acquisition date, Operator, Status, Group and Region*.
- parameters relating to the note: *Date, Owner, Owner's department and Type*.

- **Note/Type** - this report shows a quantitative and percentage breakdown of the note database by note type. The information is presented using a table and a pie chart.
- **Note list/Worker** - this report shows a list of notes grouped by owner. The information is presented using a table.
- **Note list/Company** - this report shows a list of notes grouped by contractor. The information is presented using a table.

Summary

The ITCube system is a modern, professional way to manage your company's communication with customers and to support the work of your sales representatives. With easy setup, ease of use, an intuitive user interface and many data import tools, the ITCube can be implemented within a few days. The solution is based on modern and proven technologies, such as MySQL, MariaDB, Java. As a result it is a stable solution and can be integrated with all major operating systems (Linux, Windows).

The ITCube Software team thank you for your interest in the ITCube system. We hope you enjoy the efficiency of the system. If you have any questions or comments, please share them with us by email at support@itcube.pl.

Annex

Searching for, viewing, editing and deleting data

In the ITCube system, for each object added to the system, there are mechanisms that allow you to search for data/information. All these mechanisms work in the same way. The only difference between these object search mechanisms is the columns according to which you can search for data. They may also differ in the additional parameters available at the bottom of the form. The form of each search mechanism contains two parts. The first part is used only switch between record groups (the system will normally display one group of records at a time, each of ten records and each line containing information about one record).

You can switch between groups of records in one of two ways. One is a drop-down menu where you select a record group. The other way is a set of four buttons on the left and right sides of the search form. You can use the buttons:

- **IK** go to the first record group in the database;

- << go to the record group before the one you are viewing;
- >> go to the record group that follows the one you are viewing;
- >| go to the last record group in the database.

IMPORTANT: The default setting is that you can switch between all record groups. However, if you have narrowed down your search results by setting a particular parameter, you will only be able to switch between those records which meet the defined criteria (parameters).

IMPORTANT: Pay attention to the number shown next to the drop-down list. That is the total number of records that meet the defined search criteria.

IMPORTANT: In the search mechanism, you will only see those records which you have the authorisation to read. This setting can be changed in the *itcube.ini* configuration file for selected search forms (in which case the read authorisations will be verified only after clicking on the record).

The selected record group will be displayed in a section below. In the first row of the table, there are column descriptions and fields where you can search for the records. Additionally, in the first column, which contains the record number, there is an arrow icon. If you click on this icon, additional columns will be hidden and displayed.

IMPORTANT: Any user of the ITCube system can combine the search mechanisms from different columns. The system will then display all the records meeting all of the defined criteria.

To view details of a record, just click on the record. Also note the context menu available when you click on the icon in the first column on the left (*No.*). This context menu allows you to view details of the record, edit or delete the record, and perform other tasks specific to that particular record.

At the bottom of the search form, there is the *Search* button. If you click on it, the system will load the search results for the defined parameters.


Viewing the information contained in a record

To view the information contained in a record, you can either:

- left-click on any part of the description of a record listed in the search results; or
- left-click on the action symbol next to the record number and select the *View record* option.

The system will open a new window with information on the record and its history.

IMPORTANT: If any field is not completed, this will be indicated in the view screen by the ■ icon.

IMPORTANT: The information you are viewing can be printed at any time. To do so, use the  printer icon in the right bottom corner of the window.

IMPORTANT: At the bottom of the window, the system will tell you which user was the last one to modify that record. The details displayed include the user's full name and the exact date of the modification.

Modifying the information contained in a record

A person with the required authorisation may, at any time, modify the information contained in any record. To do so, left-click the action symbol next to the record number and select the *Edit record* option. Then use the form opened by the system to make the necessary changes. For the change(s) to be saved, you must approve it/them by clicking on the *Save* button at the bottom of the form. Similarly, if you click on the *Cancel* button, the system will reject all the corrections you have entered.

Deleting a record (*)

Each record may be deleted from the system at any time. To do so, left-click the action symbol next to the record number and select the *Delete record* option. The *ITCube* system will ask you to confirm your decision to delete the particular record. If you confirm your decision (by clicking the *Yes* button in the confirmation window), the record will be removed from the database.

IMPORTANT: If you delete a record, all the entries linked with that record will be deleted too. For example, if you delete a contractor record, the contact persons, task, emails, notes, projects, files sales documents, service requests, service tasks, guarantees and service contracts linked with that contractor will be deleted as well. You should, therefore, be very careful when deleting records, as you may delete information you need.

Using patterns to search for records

Patterns allow you to perform advanced searches for records in the *ITCube* database. Search patterns consist of alphanumerical characters and the following special symbols: "_" and "%".

The "_" means one character may appear, while the "%" symbol means that a sequence of characters may appear.




Examples:

"%em" - fields ending with the "em" sequence, e.g. *Modem*;



"%cha%" - fields containing the "cha" sequence, e.g. *Richard*;

"_ou%" - fields containing the "ou" sequence in the second position, e.g. *House*.

Linking a record with a contractor and a contact person

Practically any form in the ITCube system can be linked with a contractor and a contact person. To do so, use the following fields: *Company* and *Contact*. When you are adding an object (e.g. a task, a note or a file) from the context menu of a contractor or contact person record, these fields will contain details of that contractor/contact person. When you are adding an object from the main menu, the drop-down list of companies will, by default, be empty. To find a contractor to be linked with a particular object, click on the icon  next to the *Company* field. The system will then open a contractor viewer, which you can use if you have the proper authorisation. When searching for a contractor, all you need to do is to click on its name. The system will automatically insert the name of the contractor in the *Company* field. If the contractor you wish to add is not registered in the ITCube system yet, you can register the new record when adding any object, by clicking the  button. When you select a contractor, the *Contact* field will show all the contact persons linked with that contractor. If the contact person you look for is not present you can always add a new one by clicking the  button. By default, the *Contact* field will show all the contact persons without a contractor named.

Linking a record with a project and a project stage

Most of the forms in the ITCube system can be linked with a project or a project stage. To do so, use the following fields: *Project* and *Project stage*. When you are adding an object (e.g. a task, a note or a file) from the context menu of a project or a project stage, the *Project/Project stage* fields will be auto-populated. When you are adding an object from the main menu, the list of projects will, by default, be empty. To find a Project to be linked with a particular object, click on the  icon next to the *Project* field. The system will then open a projects viewer, which you can use if have the proper authorisation. When searching for a project, all you need to do is to click on its name. The system will automatically insert the name of the project in the *Project* field. If the project is not registered in the system, you can register it when adding any object, by clicking the  button. When you select a project, the *Project stage* field will show all the stages sorted by stage number. The system will suggest the first active stage of the selected project. Additionally, the *Company* will contain the name of the contractor named in the *Company* field of the project, unless the field was already completed. Additionally, the *Company* drop-down list will contain the names of all the contractors named in the *Connected to* field of the selected project.

Detecting gestures on a tactile device




















If your online browser detects gestures, then by touching the top bar in the case of the system's forms, you will be able to select certain options from the context menu. To select an option, run your finger to the left or the right. In each form, one or two of the most frequently used options is/are already suggested, and you will not be able to replace these options with any other from the menu. If run your finger to the left, the system will, in the case of most forms, select the record edition option.

Formatting content with a build-in HTML editor

This form is used:

- to enter the content to be displayed on the home page of the Extranet module;
- to edit email/fax correspondence;
- to edit internal support items.

In addition to the field where you can enter new content, the form has two rows of text-formatting icons which allow :

-  to cut out selected text and move it to the system's clipboard;
-  to copy selected text into the system's clipboard;
-  to paste text from the clipboard to an edition field;
-  to replace selected text with a link;
-  to insert tables;
-  to make selected text bold;
-  to italicise selected text;
-  to highlight selected text;
-  to remove the HTML formatting in selected text;
-  to align selected text to the left;
-  to align selected text to the middle;
-  to align selected text to the right;
-  to justify selected text;
-  to create a numbered list;
-  to create a bullet point list;
-  to move a paragraph to the left;
-  to move a paragraph to the right;
-  to change the font colour;
-  to change the background colour.

Below these icons, there are drop-down lists you can use:

- to change the typeface;
- to change the font size;
- to change the format of headings used in the text;
- to insert images imported into the *Graphics repository*;
- to insert pre-defined document templates (when editing an email or a fax);
- to insert a dynamic variable (the value of which is taken directly from the database) concerning, among others, a counterparty, a contact person or a sale document to which the correspondence is related.

We can paste content/photos from external sources into the editor. It should be noted, however, that embedding such data at the place of pasting does not always guarantee that the formatting will not be damaged. Therefore, when pasting, the system offers a choice between plain text (if such a version is available in the system clipboard) and formatted original content. In addition, when pasting image files from the local disk, they are added to the content as standalone Base64 code and not as a file path, which would not be interpreted correctly on another computer.

Sorting records

The ITCube system allows you to search the database for information in many different ways. In many cases, it is very likely for the system to display a list of records with a few, a few dozen or several hundred records. In such a case, you will certainly enjoy the benefits of the system's mechanism for sorting search results alphabetically.

To sort the search results in alphabetical order, select one of the columns (except for *No.*) to be sorted and left-click the mouse on its name. In response, the system should display a small graphic symbol ↓ indicating that the values in the selected column are now arranged alphabetically.

IMPORTANT: Search results can be sorted in two ways: in ascending order (from the lowest value to the highest), which is indicated by an arrow pointing downwards ↓ or in descending order (from the highest value to the lowest), which is indicated by an arrow pointing upwards ↑.

Adding a file to a record

A file can be added to a record in one of two ways:

1. If the file you wish to add to a form is registered in the database of the ITCube system, click on

the ^ button to the left of the *Files* field. When you click on that button, the system will open a new window listing all the file documents available in the system. Now find the file you wish to add to the record and click on that document. The system will close the file search window and link the selected document with the record. The document so linked will be displayed in the *Files* field.

2. If the document you wish to link with a form is not registered in the database yet, you will need to register it first. To do so, click on the + button to the left of the *Files* field. When the file has been registered, the system will link the document with the form in the same way as was described above.

IMPORTANT: In the *Files* field, you can add many documents by repeating the steps described in 1 and 2. If you do not want a particular document to be saved, although it has already been inserted in the *Files* field, uncheck it by clicking on and holding down the *CTRL* button.

Assigning authorisations for records

For virtually any record in the ITCube system, the *Read* and *Write* authorisations can be assigned. In some cases, you can also assign the authorisation to creating *History*. This applies to objects such as *Company*, *Project*, *Guarantee* and *Service contract*. A user with the *Read* authorisation has the right to view data/information. The *Write* authorisation means that the user is free to edit records, while the *History* authorisation means that the user can link records with objects (e.g. adding tasks or notes to a contractor record).

Any user with the authorisation *Record rights management* has the right to define which user group (apart from the system administrator and the record owner/operator) will be able to read and/or edit the a particular record. To assign the *Read* authorisation, select user groups in the *Read* field by left-clicking on their names. To assign the authorisations to modify or delete records, select user groups in the *Write* field by left-clicking on their names. Follow the same steps to assign the *History* authorisation. To select more than on group, hold the *CTRL* button and left-click the mouse on the user groups you wish to use.

If a user does not have the *Record rights management* authorisation, the authorisation section will be hidden. It will, however, be auto-populated with the values from the *Default rights* section in the record of the user that is adding the record.

Managing dictionaries (*)

Each form in the ITCube system has a drop-down list (so called dictionaries) that can be modified freely by the system administrator. To manage a dictionary, select, from the main menu, the icon

related to the dictionary you wish to modify. Now select the *Dictionary* option, which is the last item on the menu. When you choose this option, the system will open another menu, where you will be able to select the dictionary to be modified. For example, to modify a contractor's industry dictionary, click on the *Companies* icon, select the *Dictionary* option and click on *Company industry*.

The dictionary management forms allows you:

- to add a new value in the *Name* field, in the *Add dictionary value* section, by clicking on the *Add* button;
- to modify an existing value, by selecting the value of the dictionary to be modified from the drop-down menu in the *Delete/Change directory value* section. The selected value will appear in the *New name* field, where you will be able to change it. The change will be saved in the system only if you confirm it using the *Save* button;
- to delete an existing value, by selecting it from the drop-down menu in the *Delete/Change directory value* section and clicking on the *Delete* button.

IMPORTANT: Deleting a dictionary item that was previously used in the process of creating a record will not delete any of the information from that record or the record itself. As a result, the deleted dictionary item will be presented as crossed off.

The *ITCube* system also allows you to enter a *default value*, which will be suggested as the first option on the list. The other dictionary items will be arranged alphabetically. The default value can be set in one of two ways:

- by checking the *Default value* field in the process of adding a new dictionary item;
- by checking the *Default value* field in the process of editing a dictionary item.

System notifications

The basic mechanism of reminding the user about the necessity of performing planned activities are pop-up windows. They inform about upcoming deadlines for tasks, projects, project stages or service activities. At the same time, they offer an interface for managing reminders and noting down the process of realization of selected objects.

In addition, a mechanism for informing users by means of system tray notifications can be activated. This mechanism is focused on events of lesser importance, mainly related to the fact that user records were modified by other people. Examples of events generating this kind of notification are :

- Acceptance/Rejection of my cost
- Acceptance/Rejection of my sale document
- Acceptance/Rejection/Completion of my group correspondence

- Acceptance/Rejection of my absence
- Modification of my task by another person
- Modification of my sale document by another person
- Modification of my project by another person
- Modification of my project stage by another person
- Modification of a project stage in my project by another person
- Modification of my service request by another person
- Modification of my service task by another person
- Adding an entry to the company's help database

Encoding in the system

The ITCube system uses two different encoding methods, depending on the database installed. If the MySQL database is used, the system will use the Windows-1250 encoding (Central European languages). If the MariaDB database is installed, the encoding method is UTF-8. If information is entered in different encoding systems, an error in the system may occur, although mostly in the case of the Windows-1250 encoding system. Therefore, if you wish to add characters in, e.g. Russian or Arabic, or in any West European language, you should use the MariaDB database.

Remember that all the files generated by the system are saved in different encoding systems, depending on the database installed. Similarly, when preparing files to be imported, the files should be saved in the right encoding system: Windows-1250, if the MySQL database is used, or the UTF-8 encoding method, if the MariaDB database is used.

Differences between MySQL and MariaDB

There are many differences between the MySQL and MariaDB databases used in the ITCube system. First of all, MySQL 4.0.27 is available only in a 32-bit version. It is, therefore, impossible to allocate plenty of RAM (limitation of 32-bit applications). In the case of MariaDB, you can choose between a 32-bit or 64-bit installation. Another difference is the encoding systems. MariaDB uses UTF-8, while MySQL uses Windows-1250. In the case of MySQL, there is the Year 2038 problem. It means that some calculations using dates above 2038 are incorrect. This is not the case with MariaDB.

Technical documentation

The main purpose of this document is to describe the functions available to the ordinary user in the user interface. Users with the system administrator role who are interested in technical descriptions of each module should visit the manufacturer's website and download the necessary

documentation. The downloadable resources include, in particular, technical documentation for the following modules:

- ITCube Import API,
- ITCube KseF,
- ITCube ICAL,
- ITCube INTEGRATOR for the different systems (SAGE ERP, Symfonia 2.0, COMARCH ERP XL, COMARCH ERP Optima, ASSECO WF-MAG, InsERT Subiekt GT, Enova365)

Supplement A - technical aspects

Administering the instance of ITCube in the Linux environment

The ITCube system can be installed in the Windows operating system or Linux system. This section provides basic information about administering the ITCube system in the Linux environment.

Running the ITCube system

To run the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the `/home/icsolutions/ITCube` directory
2. Run the `ITCube_database.sh start` command
3. Run the `ITCube_server.sh start` command
4. Run the `ITCube_imap.sh start` command
5. Run the `ITCube_deamons.sh start` command
6. Run the `ITCube_integrator.sh start` command (only if you are planning to use the module allowing you to integrate the system with an external one)
7. The system is available at `http://SERVER_IP:8080/itcube.html`

Another way to run all the above services is to run the `ITCube.sh start` command.

IMPORTANT: The system is available at `http://SERVER_IP:8080/itcube.html`. The `SERVER_IP` value should, of course, be replaced with the IP number of the computer on which the ITCube system is installed. This will allow you to use the ITCube from any computer connected to a local network (or the Internet, provided that the computer on which the ITCube system is installed has a public IP address).

Stopping the ITCube system

To stop the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the `/home/icsolutions/ITCube` directory
2. Run the `ITCube_database.sh stop` command

3. Run the *ITCube_server.sh stop* command
4. Run the *ITCube_imap.sh stop* command
5. Run the *ITCube_deamons.sh stop* command
6. Run the *ITCube_integrator.sh stop* command

Another way to stop all the above services is to run the *ITCube.sh stop* command.

Making a backup copy

To make a backup copy of the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the */home/icsolutions/ITCube* directory
2. Run the *ITCube_backup.sh* command

IMPORTANT: Running the last command will temporarily stop the database and make a backup copy in the */home/icsolutions/ITCube/backup/{current_date}* directory. All the files in this directory should periodically be copied onto an external hard drive and stored in a safe place.

IMPORTANT: If the hard drive has not enough space, running the *ITCube_backup.sh* command will not make a backup copy correctly.

Recovering the system from a backup copy

To recover a backup copy of the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the */home/icsolutions/ITCube/backup* directory and then to the subdirectory containing the archive from which you wish to recover the system
2. Run the *chmod +x *.sh* command
3. Run the *Backup_install.sh* command

IMPORTANT: If the required backup copy is not found in the */home/icsolutions/ITCube/backup*, but it is located elsewhere (e.g. on a DVD or an external hard drive), then in the */home/icsolutions/ITCube/Backup* directory, create a directory with the current date, copy the backup copy files into that directory and follow the commands given above.

IMPORTANT: Recovering a backup copy will delete the current database, which is found in the */home/icoslutions/ITCube/db* directory.

Installing an upgrade of the ITCube system

To upgrade the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the */home/icsolutions/ITCube/upgrade* directory and save the *upgrade.tgz* and *sp.tgz* files there. These files are provided by the manufacturer
2. Run the *Unpack.sh* command

3. Without stopping any service, run the *Upgrade.sh* command. Running this command will:
 - make a backup copy of the database;
 - update the binary files;
 - update the database;
 - close the system;
4. Start the ITCube system manually.

IMPORTANT: If the upgraded version contains a modified/extended *itcube.ini* file, this will be named *itcube_blank.ini*. From this file, you will be able to copy, into the *itcube.ini* file, the new variables you wish to change.

Installing ITCube system service packs

To install a service pack for the ITCube system in the Linux environment correctly, perform the following steps:

1. Go to the */home/icsolutions/ITCube/upgrade* directory and save the *sp.tgz* file there. This file is provided by the manufacturer
2. Run the *Unpack.sh* command. This will:
 - update the binary files
 - close the system
3. Start the ITCube system manually

Administering the instance of ITCube in the Windows environment

This section describes the process of running/stopping the system, upgrading/updating the software and creating/recovering backup copies in the Windows environment.

IMPORTANT: The instructions described below should be run from a user account with full administrator authorisations. In modern windows systems, you should also use the *Run as administrator* command.

Running the ITCube system

To run the ITCube system in the Windows environment correctly, perform the following steps as an administrator:

1. Go to the *C:\ITCube* directory
2. Run the *ITCube_start_database.bat* command (this will run the ITCube_database system service)
3. Run the *ITCube_start_server.bat* command (this will run the ITCube_tomcat system service)
4. Run the *ITCube_start_imap.bat* command (this will run the ITCube_imap system service)

5. Run the *ITCube_start_deamons.bat* command (this will run the ITCube_deamons system service)
6. Run the *ITCube_start_integrator.bat* command (this will run the ITCube_integrator system service). Run this command only if you are planning to use the module allowing you to integrate the system with an external one.
7. The system is available at http://SERVER_IP:8080/itcube.html

IMPORTANT: The system is available at http://SERVER_IP:8080/itcube.html. The SERVER_IP value should, of course, be replaced with the IP number of the computer on which the ITCube system is installed. This will allow you to use the ITCube from any computer connected to a local network (or the Internet, provided that the computer on which the ITCube system is installed has a public IP address).

Stopping the ITCube system

To stop the ITCube system in the Windows environment correctly, perform the following steps as an administrator:

1. Go to the C:\ITCube directory
2. Run the *ITCube_stop_database.bat* command (this will stop the ITCube_database system service)
3. Run the *ITCube_stop_server.bat* command (this will stop the ITCube_tomcat system service)
4. Run the *ITCube_stop_imap.bat* command (this will stop the ITCube_imap system service)
5. Run the *ITCube_stop_deamons.bat* command (this will stop the ITCube_deamons system service)
6. Run the *ITCube_stop_integrator.bat* command (this will stop the ITCube_integrator system service). Run this command only if you are planning to use the module allowing you to integrate the system with an external one.

Making a backup copy

To make a backup copy of the ITCube system in the Windows environment correctly, perform the following steps as an administrator:

1. Go to the C:\ITCube directory
2. Run the *ITCube_backup.bat* command

IMPORTANT: Running the last command will temporarily stop the database and make a backup copy in the C:\ITCube\backup\{current_date} directory. All the files in this directory should periodically be copied onto an external hard drive and stored in a safe place.

IMPORTANT: If the hard drive has not enough space, running the *ITCube_backup.bat* command will not make a backup copy correctly.

Recovering the system from a backup copy

To recover a backup copy of the ITCube system in the Windows environment correctly, perform the following steps:

1. Go to the C:\ITCube\backup directory and then to the subdirectory containing the archive from which you wish to recover the system
2. Run the *Backup_install.bat* command

IMPORTANT: If the required backup copy is not found in the C:\ITCube\backup, but it is located elsewhere (e.g. on a DVD or an external hard drive), then in the C:\ITCube\backup directory, create a directory with the current date, copy the backup copy files into that directory and follow the instructions given above.

IMPORTANT: Recovering a backup copy will delete the current database, which is found in the C:\ITCube\db directory.

Installing an upgrade of the ITCube system

To upgrade the ITCube system in the Windows environment correctly, perform the following steps as an administrator:

1. Go to the C:\ITCube\upgrade directory and save the *upgrade.tgz* and *sp.tgz* files there. These files are provided by the manufacturer.
2. Run the *Unpack.bat* command.
3. Without stopping any service, run the *Upgrade.bat* command. Running this command will:
 - make a backup copy of the database
 - update the binary files
 - update the database
 - close the system
4. Start the ITCube system manually

IMPORTANT: If the upgraded version contains a modified/extended *itcube.ini* file, this will be named *itcube_blank.ini*. From this file, you will be able to copy, into the *itcube.ini* file, the new variables you wish to change.

Installing ITCube system service packs

To install a service pack of the ITCube system in the Windows environment correctly, perform the following steps as an administrator:

1. Go to the C:\ITCube\upgrade directory and save the *sp.tgz* file there. This file is provided by the manufacturer.
2. Run the *Unpack.bat* command. This will:
 - update the binary files
 - close the system

3. Start the ITCube system manually

Technical requirements for workstations

The ITCube system supports the following Internet browsers (versions in brackets): Firefox (115.0), Chrome (125.0).

Technical requirements for servers

1. Operating system: Windows 2012/2016/2019/2022 Server, Windows 10 or newer, Linux (selected distributions – for example: Debian, Ubuntu);
2. Minimum RAM: 4 GB + (Number of users) * 50 MB;
3. Minimum processor: 2 cores * 2 GHz;
4. One available USB port.

Additional technical notes

1. Individual additional fields added at the Client's request during implementation are limited to 255 characters regardless of the type of presentation (text field, description field or drop-down list).