Attaché

Attaché ClearView

Dashboard

User Guide

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Introduction to ClearView Dashboard

The Attaché ClearView Dashboard offers a quick and easy way to see the valuable information that lies at the heart of your Attaché accounting and payroll system.

Improve business management. The Dashboard puts a wealth of information at your fingertips. Manage To-Do lists and reminders; Instantly see debtor ageing analysis and overdue payments; Monitor cash requirements and purchases due; See customer and product sales history and be alerted to declining sales; Spot potential problems such as low margin sales and negative stock; See products that need to be reordered to meet current sales demand.

Monitor business performance. Instantly see Key Performance Indicators (KPIs) which reflect the health of your business. Use this information to track performance over time.

Data is Live. The ClearView Data Service formats data for display on the Dashboard within compartments known as "gadgets". As processing continues, screens can be refreshed (like a web page) to pick up recent changes.

Gadgets are interactive. The data within each gadget is like an interactive report. You can sort and filter the information to see just what you need. You can also drill into enquiry screens by clicking on codes and document numbers.

Streamline payroll functions. The Payroll pages allow you to record and monitor leave requests, employee review dates and other notes. Be alerted to employees with negative leave as well as birthdays and anniversaries occurring this month. See comprehensive information relating to a selected employee including active pay, pay history, leave entitlements, contact history and more. View exception messages relating to active pays, such as missing leave loading or banking line less than net pay.

Information is role-based and personalised. The Dashboard displays information across three functional areas: Accounts, General Ledger and Payroll. Users can specify their home page, e.g. the Payroll clerk may want ClearView to open at the Payroll Home page. Many gadgets will display information differently depending on who is logged in.

Search Tool. Perform instant web-style searches on customers, products, suppliers and employees.

Customise Dashboard content. You can change the behaviour and appearance of an existing gadget by modifying its properties. E.g. change the gadget properties to show more (or fewer) columns, or to display the data in a different format such as a calendar or chart, or to include a search box. You can also swap gadgets around by changing the data source.

Change Dashboard appearance. You can change the dashboard's colour scheme and theme to suit your preference.

Extend your ClearView features. If you'd like gadget content and other reports to be tailored to meet your needs, add the ClearView Report Designer. If your business has a sales focus, add ClearView CRM (Customer Relationship Management). By adding other ClearView modules you'll have even more tools to control and improve your business.

Dashboard Quick Start

This section contains a summary of steps required to set up the Clearview Dashboard. You can print this page and use it as checklist.

More information is provided in the *Setups* section below. For information about installing ClearView, refer to the Quick Start section in the ClearView Getting Started Guide.

1. **Licensing.** You should see “Clearview” in the Help | About | Modules Installed... program.
2. **Menu Access Rights.** Check that the Attaché menu access rights are appropriate for each ClearView user.
3. **User Preferences.** Check that the Attaché menu style suits the needs of each ClearView user.
4. **User Options.** Specify the users who need ClearView to start automatically, and who need access to the GL tab.
5. **ClearView Options.** For each user, assign a Sales Rep and Employee code and other user level settings. Setup any additional Contact Types required.
6. **Configure the ClearView Data Service**. ClearView requires the ClearView Data Service to process data in Attaché into a format which can be displayed by the dashboard.
7. **Start ClearView.** To manually start the ClearView dashboard, go to Masterfiles | ClearView | Business Intelligence | Dashboard.
8. **If needed, Customise Gadgets.** Use the Properties gadget tool to change the appearance and contents (data source) of standard gadgets. If you are licensed for the ClearView Report Designer you can create your own gadget data sources and reports.

Setups

Licensing

A license is required for the ClearView Dashboard. Check this via the Help | About | Modules Installed... program.

You should see **ClearView** in the list of modules installed. If not, please check with your Attaché sales team.

Menu Access Rights

ClearView uses Attaché's Menu Access Rights to control the security of your data.

For example, users with access to Masterfiles – Employee – Employee Details will see data on the ClearView Payroll Pages. Users without this access will be able to access the Payroll pages but will not see data in the gadgets. This means that your sensitive data is automatically protected from unauthorised staff.

It is recommended that you check that menu access rights are appropriate.

Login as SUPERVISOR and use Setups | Company | Menu Access | Menu Access Rights to allow access to programs and reports for individual users.

ClearView Options

Setups | ClearView | Options | ClearView Options

The ClearView Options can also be accessed via the lock icon on the ClearView Toolbar.

User Settings

- **Level**: This is the Attaché password level and is displayed as a guide for the Supervisor when administering rights.
- **Administrator**: You can assign a user (other than the SUPERVISOR) administrator rights. Users with admin rights can set gadget security.
- **Sales Rep:** Assign the user to the specified Sales Rep code. Many ClearView sales related objects filter based on Sales Rep. This Sales Rep code will be used when selecting the default view for the user.
- **Employee:** Assign the user to the specified Employee code. Many ClearView payroll related objects filter based on Employee.
- **Change Rep:** Allows change of Sales Rep view on the ClearView dashboard.
- **Edit Settings:** Allows user to change gadget properties.
- **Copy Settings From:** You can setup gadget content for a "group" user (eg. "SALES"), and then assign content based on this user.
- **Home Page:** You can specify the default home page for each user. If blank, ClearView will start the user on the last page that was loaded.
- **Refresh Pages:** This option has been introduced in ClearView 2.20. If selected the pages will refresh every time ClearView is started and will open on the "Welcome to ClearView Dashboards" screen after clicking continue it will take you to a current view base on the Home Page option above. If not selected then ClearView will open on a cached page which is the view that the user was last on before closing ClearView. All upgraded sites and new sites do not have this box checked.
- **Reset Views to Defaults:** This will reset any changes to ClearView gadgets back to their defaults. Defaults can be reset for the Current User or for All Users (Supervisor only).

Mail Settings

Setups | ClearView | Options | ClearView Options

Enter the address of your outgoing mail server so that CRM can send emails. You can specify the Address, Port, User Name and Password of your SMTP mail server. The default Address is "mail", but if you're unsure you should check with your IT support people. This should be the same address as your default mail client (eg. Outlook).

(TIP: If you enter "demo" as the Address, e-mails will not be sent and no error messages will be displayed. This feature is useful for training or demonstrations.)

Timeout is the time before ClearView aborts attempting to send mail if it has not received a response from the server.

If you have trouble sending e-mail, you can increase the **Transmission Log Level** so that support people have more information about your problem.

If you use the mail server of your ISP, you can adjust the Transmission Options **to reduce the risk of valid e-mail being recognised as SPAM.**

After making changes on the Options screen, press the Save button at the bottom right.

Contact Types

Contact Types can be assigned to help categorise dealings with customers and employees, and to allow more flexibility when sorting and filtering history records.

New contact types can be added by clicking the Plus sign beside the contact type field on the Task screen.

To record upcoming leave requests, create contact types in the format Payr_Leave* (eg Payr_Leave, Payr_LeaveAL, Payr_LeaveSL etc). Active tasks that have a contact type in this format will be displayed in the "Upcoming Leave" gadget on the Payroll – Leave Analysis page.

TIP: Contact types are displayed alphabetically, so use the code format to group by functional area. Eg Acc_DebtColl, Acc_CreditReview, etc.

Setting up Financial Ratio Sets for GL Page

As the Attaché ClearView financial ratios gadgets draw information directly from the Attaché Accounts General Ledger masterfiles, you need to create financial ratio sets within Attaché to tell ClearView where to find the data.

You must set up at least one default financial ratio set to allow ClearView users to access general ledger data. However, if you have structured your chart to reflect different responsibilities or different cost centres, you can establish separate financial ratio sets for each department or cost centre.

To set up financial ratio sets in Attaché:

1. Choose Setups | General Ledger | Financial Ratio Sets | Maintain.
2. Enter a financial ratio set code. The code can be up to 3 characters in length and should be designed to help you readily identify the purpose of the set being created.
3. Give your financial ratio set a name which will assist users in identifying the part of the general ledger chart which is reported in this set.
4. Complete the Profit & Loss Accounts mapping by identifying which general ledger account codes from your chart store the information required for the various ratios. For example, enter the code for the Profit and Loss account used to record the total cost of acquiring goods and services for sale, beside the *Cost of Sales (COGS)* label.

5. Complete the Balance Sheet Accounts mapping by identifying which general ledger account codes from your chart store the information required in the various ratios. For example, enter the code for the Balance Sheet account used to record the value of stock on hand, beside the *Stock* label.
6. Enter your desired Key Performance Indicators (KPIs) for each of the four operating ratios – *Debtors Days*, *Creditor Days*, *Stock Turn Days* and *Operating Cycle Days*. These values are entered in days. In most cases the lower the number of days the more efficiently you are processing debtors, creditors and stock.

Refer to the Understanding Attaché ClearView Financial Ratios for more information.

User Options

You also need to set up user options in Attaché to tell ClearView which financial ratio set each user wishes to display.

To set up ClearView user options:

1. Choose Setups | Company | Options | User Options.
2. Type the user name or choose Find (F2) to locate the required user.
3. Tick Launch ClearView on open if the user wishes ClearView to launch when this company is opened.
4. In the Primary FR Set Code field, choose a financial ratio set from the list created in Financial Ratio Set Maintenance. This set of general ledger codes will be used to populate the gadgets on the ClearView General Ledger pages.

Repeat these steps for each user, in each ClearView company.

Note: Leave Comparative FR Set Code blank. This feature is for a future enhancement to ClearView dashboards.

If you'd like the user to access the GL tab, select the Financial Ratio (FR) Set Codes. Refer to Setting up Financial Ratio Sets for GL Page for more details.

Menu style preference

Attaché offers various menu style options. The format that works well with ClearView is a Drop-down style Menu using Toolbars, but this can be configured to suit the user.

You can change the menu style for a user via File | User Preferences.

ClearView Data Service

The ClearView Data Service (CDS) processes Attaché data into a format which allows it to be displayed quickly by the dashboard.

The CDS operates as a windows service which must be installed separately on the same computer on which your Attaché programs are installed. The CDS also has an on-demand mode which can be started from the ClearView Toolbar.

The CDS must be enabled and initialised before it can be used. See the *ClearView Getting Started Guide* for more details.

Using the Dashboard

Starting ClearView

If you have selected Auto Start in the User Options, ClearView will launch automatically when you log into Attaché. To manually start Clearview, select Masterfiles | ClearView | Business Intelligence | Dashboard.

If you have specified a Home Page in the ClearView Options, ClearView will open at the same page each time. Otherwise ClearView will remember the page you last accessed and automatically load it when you next log in.

Dashboard appearance

Screen Resolution

The amount of information you can see on the ClearView Dashboard (i.e. the number of rows and columns) depends on your screen resolution. Higher screen resolutions are best, but this depends on the size and capability of your monitor/display.

When you first login, ClearView will automatically adjust to your screen resolution.

If you change your screen resolution or window size then ClearView resolution will be recalculated next time the page refresh button is selected.

Screen colour and theme

If desired you can change the dashboard's colour scheme and theme via the Clearview Toolbar.

A number of themes are provided including various Windows themes (XP, Vista and Classic) as well as the Original.

Text colour

Text colour can only be black or red.

ClearView has a "Highlight" property (Gadget Properties) which allows the text colour to switch between black and red depending on a condition.

Calendar-driven gadgets (e.g. My To Do List and Items Due) will display records in red text if they are overdue. The condition is that if the Highlight property is set and the field named "BIDATE" in the gadget data source SQL is older than the current computer system date, the text colour will change to red.

Rather than using BIDATE, you can also create your own rules to highlight text by customising a gadget. For more information refer to the ClearView Report Designer user guide.

Drill Down Indicator

Any gadget field underlined with a blue dotted line has a drill down event associated with it. The following example shows two fields that have drill down events.

Customer	Details
LANE	Payment terms-$15000 a month minimum repayment, once received we will ...
ACE	Dawson Manufacturing- awaiting credit for $301.88 faulty goods collected by rep

Active Row Indicator

Any row in a gadget that has the mouse positioned over (active row) will be shaded.

Supplier	Balance	Last Payment Date	Last Payment Amount	Last Purchase Date
Grimes & Strong	$87,909.84	31/08/2011	$6,233.67	25/08/2011
Loder Industries	$82,257.46	31/08/2011	-$130,000.00	27/08/2011
Bass & Webb Appliances	$76,755.80	31/08/2011	$48,[illegible]8.00	20/08/2011

Truncated Field Indicator

Any memo or text field that cannot fit into the allocated column width will display a truncated view of the information followed by "…". When the mouse is hovered over these fields the full field contents will display.

Customer	Details	Due	Contact	Date	Rep	ID
ACE	Need to review credit limit, have been over for last couple of months. Need b	5/01/2011	Murray Ray	17/12/2010	2	7
STARR	Carmen advised they would be paying $7K by 4/02 and remaining $7720.39	8/03/2011	Carmen Pelosi	28/01/2011	2	9
HOMEHO	Account is overdue, Michael has agre			25/02/2011	3	11
HOMEHO	Account put in dispute, do not proce			25/02/2011	3	12

Need to review credit limit, have been over for last couple of months. Need business guarantee signed.

Viewing personalised data

Many Dashboard gadgets display information differently depending on who is logged in. E.g. on the Accounts Home page, the My To Do List gadget will show only Tasks assigned to the selected Sales Rep.

To see personalised data an Attaché Sales Rep must to be assigned to each user in the ClearView Options.

When you log into ClearView, your Sales Rep code is recognised and displayed in the Rep field on the ClearView Toolbar.

If authorised (via Clearview Options), you can switch between Reps via the ClearView Toolbar.

Navigating the ClearView Dashboard

ClearView presents information across various Tabs. The tabs you see depend on your Attaché installation:

- If you only have the Attaché Payroll module installed, you'll only see the Payroll tab (assuming you have appropriate menu access).
- If you have Attaché Accounts and Payroll installed (and the appropriate Payroll menu access), you'll see the Accounts, GL and Payroll tabs. You'll also see the CRM, Controller and Cashflow tabs, but when you select the tab you'll only see data if you're licensed for these modules.

Each Tab includes several Pages, and each page has several Gadgets.

Move around ClearView by clicking the Tab (e.g. Accounts, next to "Go To"), then clicking the Page (e.g. Customers). You can also select the relevant Page via the drop-down selection in the ClearView Toolbar.

Refreshing data

ClearView is similar to a web page; it needs to be refreshed from time to time so you see the most up to date information.

The Dashboard gadgets are refreshed automatically when you:

- **Open ClearView.** This refreshes the Page that opens (e.g. your designated home page).
- **Move to a Page that hasn't been accessed since opening ClearView**. Refreshes data on the Page you're moving to.
- **Move to a Tab that hasn't been accessed since opening ClearView**. This refreshes data on the home page of the Tab you're moving to.
- **Move into Full Screen View**. Refreshes data in the individual gadget you're viewing.

While working in ClearView you can manually refresh the Dashboard to pick up recent data changes.

- To manually refresh data displayed in all gadgets on the current page, click the Refresh button on the ClearView Toolbar.
- To manually refresh data displayed in an individual gadget, click the Refresh button on the Gadget Toolbar.

Changes to Attaché Options (Customers etc) are read on start only, so you'll need to re-start Attaché and ClearView to pick these up.

ClearView Toolbar

The Clearview Toolbar runs across the top of the ClearView window. Below is a summary of the actions performed by each icon.

	**ClearView Home**. Takes you to the ClearView home page (Accounts Home). This also acts as a full refresh; e.g. move to Home then to the GL tab to recalculate financial ratio data.
	**Refresh Database**. Starts an on-demand update by the ClearView Data Service (CDS). After this process, refresh the Page or individual Gadgets to display the changes.
	**Refresh Page**. Refreshes all gadgets on the current Page.
	**ClearView Dashboard Options**. Opens the ClearView Options screen. You can also access this via the Setups | ClearView | Options program.
	**Change Theme**. Cycles through the available themes and refreshes the page.
	**Change Colour**. Cycles through the available colour schemes and refreshes the page.
	**Rep**. Displays the current Sales Rep, which is linked to the user name via Options. If the user has permission to Change Rep, they can select a different Rep via the drop-down box. If the user doesn't have this permission, the drop-down is disabled.
	**Page**. ClearView allows up to 100 pages and these cannot all be displayed on "Quick Links" at the top of the page. The Change Page tool allows you to select any visible pages.

	ClearView Dashboard Help. Launches the Help documentation.
	About ClearView Dashboard. Launches a screen that includes support-related information.

Gadget Toolbar

Gadget toolbars, navigation bars and other icons and tools are summarised below.

	Gadget Properties. Modifies the run-time properties of a gadget. See Customising Gadgets for more information.
	Email. Loads the gadget content into a Clearview email message.
	Print. Prints the gadget content to screen in report format.
	Maximise or Normal. Changes Gadget view to Full View or Normal View.
	Next Page, Previous Page. Indicates that there are additional pages which cannot be displayed due to space restrictions. Select the appropriate icon to load the next or previous page.
	First Page. Indicates that the first page is not being displayed be displayed. Select the icon to load the first page.
	Next Column, Previous Column. When active indicates that there are additional columns which cannot be displayed due to space restrictions. Select the appropriate icon to load the next or previous column.
	First Columns. When active this icon will return the gadget view so that the left most available
	Next Month, Previous Month. These are displayed with the MONTHBAR component of a TODOBAR gadget and navigate between months.
	Add. The add tool is displayed with the ADDBAR component. When selected, a record is permanently added into the database (e.g. adding a To Do List task).
	Search. This icon will display in Gadgets that are search gadgets or have a search context set in their Gadget Properties. If no search field is available in a gadget then clicking this icon will change the gadget type to a search and show the search field. If the search field is displayed then a search will be initiated by clicking icon.

Individual Gadget Tool Bar Buttons

Gadget toolbar buttons can be used to filter a Gadget Data Source, change a Gadget Data Source or launch a program depending on the gadget.

The following Gadget is the Customer Totals Gadget and shows the gadget tool bar buttons All, Active, Inactive and In Dispute.


Customer Totals
All
Active
Inactive
In Dispute
Customer
Balance
Unalloc
Last Paym...
Last Payment Date
Last Sale Date
Home Stores Head Office
$80,924.25
$0.00
$4,468.20
3/10/2009
10/09/2009
Abel Sound Systems Pty ...
$43,027.36
$0.00
$3,692.50
23/10/2009
1/10/2013

Gadget Context Menu

Within a gadget you can sort data by clicking the column headings, but more functionality becomes available when you use a right-click.

The gadget context menu appears when you use the right mouse button within the body or header of a gadget.

The menu items available depend on the gadget and where the mouse-click occurs within the gadget. E.g. menu items Sort Ascending, Sort Descending will only be enabled if you right-click on a cell with data in it.

Context menu options

Full Screen View		Switches the selected gadget from normal view to full screen view
View Data Source		Displays the underlying data in a Data Grid (primarily for support purposes)
Save As ▸	**Excel**	Allows the gadget content to be saved to a Microsoft Excel worksheet
	PDF	Allows the gadget content to be saved to a PDF document
Maintain		Only visible if you right-click on a masterfile code. Launches the Maintenance screen for the selected customer, supplier, product, employee or general ledger account, allowing modifications to be made.
Table **Search** **Calendar** **Chart**		Switches the gadget Type. Some additional setups may be required; see Customising Gadgets for more information.
Filter By Selection		Filters the gadget using the data in the current (selected) gadget cell. E.g. to see only the rows relating to a particular customer, right-click on the customer code and select this option.
Filter Excluding Selection		Filters the gadget using the data in the current (selected) gadget cell. E.g. to exclude rows which relate to a certain date, right-click on the date and select this option.
Filter For…		Allows you to apply complex filtering based on the current column. E.g. to see rows that fall into January 2010, right-click and select this option then type in: `>=1/1/2010 AND <=31/1/2010`
Remove Filter		Removes the applied filter/s.
Sort Ascending **Sort Descending**		You can sort rows based on data in a column. Note: Sort is only available for gadgets which have not been pre-sorted using the `ORDER BY` clause in the data source SQL.
Totals		Applies grand totals to numeric columns.

Gadget content and features

Accounts tab

Accounts Home page

General information about debtors, creditors, stock and sales is available from the Accounts tab pages.

You can add create your own gadgets and add them to the My Accounts page. See Creating new gadgets for more information.

My To Do List

This gadget displays active Tasks for the selected sales Rep based on the Next Date (due date). By default you'll see 'Today' mode, which shows overdue tasks and reminders in red.

Refresh the gadget to see changes made to existing tasks, or tasks added by other staff and coded to your Rep code.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active tasks for the above date ranges.
- **Complete** – displays complete tasks for the above date ranges.
- **All** – displays all tasks for the above date ranges.

Actions that can be performed within this gadget include:

- **Drill into a task.** Click the relevant Details field to open the task.
- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See your upcoming tasks.** Click This Week or Next Week to see all active tasks with the Next Date within this range.
- **See your future tasks.** Bolded dates in the calendar indicate that you have at least one item scheduled for this date. Click the date to see details.
- **See tasks for a different Attaché user.** Change the Rep code in the ClearView toolbar to see tasks for a different person. Note: this is only available if configured in ClearView Options.
- **Add tasks and reminders for yourself or others.** Type details into the task bar then press the Plus sign. For more details see *Creating Task and Reminders*.
- **See more details.** Use the navigation arrows to scroll to future months, or right-click and select Full Screen View.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see active tasks for that particular customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.

- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Customer Totals

Displays customer balances in descending order (largest at the top), plus unallocated balances, Last Payment, Last Payment Date, Last Sale Date, Credit Limit, Available Credit, Indispute status and the Customer Code. NB: Only displays customers with non 0 balances.

There are 4 Gadget Tool Bar Buttons:

- **All** – displays all customers.
- **Active** – displays active customers
- **Inactive** – displays inactive customers
- **Indispute** – displays customers in dispute

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Customer** to sort in ascending order by customer code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Supplier Totals

Displays supplier balances in descending order (largest at the top), plus unallocated balances, Last Payment, Last Payment Date, Last Purchase Date, Last Purchase Amount, Indispute status and the Supplier Code. NB: Only displays suppliers with non 0 balances.

There are 4 Gadget Tool Bar Buttons:

- **All** – displays all suppliers.
- **Active** – displays active suppliers
- **Inactive** – displays inactive suppliers
- **Indispute** – displays suppliers in dispute

Actions that can be performed within this gadget include:

- **Drill into a supplier.** Click the relevant Code field to open the enquiry screen for that supplier.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Supplier** to sort in ascending order by supplier code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

GL Balances

This gadget displays of GL Balances.

There are 2 Gadget Tool Bar Buttons:

- **Summary** – displays the period and year-to-date balances of key general ledger accounts against the budget in the general ledger.

GL Balances

Summary All

Description	Current Period	Current Budget	YTD	YTD Budget
Cash at Bank Account 1	$14,895.03		$14,895.03	
Cash at Bank Account 2	$59,194.22		$59,194.22	
Credit Card/B Pay Payments	-$5,428.61		-$5,428.61	
Creditors	$143,897.70		$143,897.70	
Debtors	$105,621.56		$105,621.56	
Stock on Hand	$210,359.03		$210,359.03	
Sales	$271,975.37		$452,662.44	

- **All** – Displays all GL Accounts including the header accounts and the balances where appropriate.

  You can use the Note Number field on the account masterfile to exclude (8???) accounts from the gadget. E.g. a Bank type account with Note Number set to 8000 will not appear in this gadget.

  The header accounts of type 5 or type 6 will be displayed in Red.

GL Balances

Summary All

Account	Balance	Budget	Account Number
TRADING STATEMENT			10000
SALES			11000
Sales - Appliances	-61502.50	0	11100
Sales - Audio Visual	-246748.70	0	11110
Sales - Whiteware	-157437.00	0	11120
Sales - Services	-370.00	0	11122
Total Sales	-466058.20	0	11125
Discount Given	14251.27	0	11130
Freight Charged	0.00	0	11140
Handling Charges	0.00	0	11150
Other Income	-855.51	0	11200
Finance Charges (Sales)	0.00	0	11300
NET SALES	-452662.44	0	11999

Customers page

Customer Search

Lists all customers (or the search results) in Code order and displays contact details and balance information as well as period-to-date and year-to-date sales.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments as well as masterfile changes (address, phone, contact etc).

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active customers
- **Inactive** – displays inactive customers
- **All** – displays all customers. Inactive Customers displayed in red.

Actions that can be performed within this gadget include:

- **Search for a customer based on various criteria.** This could be part of the customer name, contact name, phone number, comment, etc. Click the search icon to execute the search.

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **PTD Sales** to sort in ascending order by period to date sales; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Customer Balances

Displays customer balances in descending order (largest at the top), plus unallocated balances and aged balances (90, 60, 30, current).

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all customers. Inactive Customers displayed in red.
- **Active** – displays active customers
- **Inactive** – displays inactive customers

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Customer** to sort in ascending order by customer code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Customers Due

This gadget displays the details of outstanding customer invoices in Due Date sequence, with the oldest at the top. The Balance displayed is the invoice Amount less any payments, credit notes or adjustments. Overdue invoices are shown in red.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue invoices
- **Today** – displays all invoices due today
- **This Week** – displays all invoices due this week
- **This Month** – displays all invoices due this month
- **All** – displays all outstanding invoices

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **Drill into an invoice.** Click the relevant Inv No field to open the lookup screen for that invoice.

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Balance** to sort in ascending order by invoice balance; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see outstanding invoices for that particular customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Customers in Dispute or Exceeded Credit Limit

This gadget displays customers with in dispute and / or operating outside their credit limit. The outstanding balance is displayed along with the available credit and credit limit.

The Reason displays as 'In Dispute' if the Dispute flag is set for the customer, or 'Credit Limit' if they have exceeded their (non-zero) credit limit. If both conditions apply, 'In Dispute' will display.

Refresh the gadget to pick up recent processing changes including customer invoices, payments, credit adjustment notes and adjustments as well as masterfile changes (credit limit, dispute flag).

There are 3 Gadget Tool Bar Buttons:

- **All** – displays Customers In Dispute or Over Credit Limit
- **In Dispute** – displays Customers In Dispute
- **Credit Limit** – displays Customer Over Credit Limit if they are also in dispute the reason will display as in dispute.

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click the reason 'Credit Limit' and choose Filter By Selection to see only the customers with credit limit issues. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Products page

Product Search

Lists all products (or the search results) in Item Code order and displays availability, selling price 1 and 2, product group and comments. The Item Code is a combination of the product location and code.

Refresh the gadget to pick up recent processing changes including product receipts, adjustments, transfers etc, stock-related customer and supplier transactions as well as masterfile changes (product description etc).

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active products

- **Inactive** – displays inactive products
- **All** – displays all products. Inactive products displayed in red.

Actions that can be performed within this gadget include:

- **Search for a product based on various criteria.** This could be part of the product code, group, description, comment, etc. Click the search icon to execute the search.
- **Drill into a product.** Click the relevant Item Code field to open the enquiry screen for that product.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Avail** to sort in ascending order by quantity available; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a product group and choose Filter By Selection to see only products in that group. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Items Due

Displays active product lines on supplier purchase orders in delivery date order, ascending (the most overdue items appear at the top). Purchase order details are also shown including purchase order number and date, supplier and quantity on order.

Refresh the gadget to pick up recent processing changes including supplier purchase orders, goods received notes and supplier invoices.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue items
- **Today** – displays all items due today
- **This Week** – displays all items due this week
- **This Month** – displays all items due this month
- **All** – displays all outstanding items

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **Drill into a purchase order.** Click the relevant PO No field to open the lookup screen for that purchase order.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Product** to sort in ascending order by product code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a supplier code and choose Filter By Selection to see items due from that particular supplier. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: This gadget ClearView uses the Item Delivery Date on the Purchase Order. This field is now available to the screen designer from Attaché version 1.03.

If you want to use the document delivery date for this gadget instead of the item delivery date you will need to change the data source SQL. To do this:

1. Open Report Designer
2. Copy the Standard and select "BI Enquiry Product Deliveries Due"
3. Select the SQL button.
4. Change "POdDelDate" to "POhDelDate" in the BIDate expression.
5. Save the report
6. Change the Data Source for the gadget to use the new copied report.

For more information refer to Report Designer User Guide and Creating New Gadgets in this guide.

Product Reorder

Displays items that have reached or fallen below their reorder level. Stock level information is also displayed; reorder quantity and level, available quantity, year to date quantity sold, product group, and primary supplier (based on product masterfile supplier 1).

Refresh the gadget to pick up recent processing changes including supplier purchase orders, customer orders and invoices with product lines, goods received notes and supplier invoices.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active products requiring reordering
- **Inactive** – displays inactive products requiring reordering
- **All** – displays all products requiring reordering. Inactive products displayed in red.

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Avail Qty** to sort in ascending order by available quantity; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a supplier code and choose Filter By Selection to see products that need to be reordered from that particular supplier. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Negative Stock

This gadget displays products with negative quantity available. Stock level information is also displayed; quantity in stock, reserved, backordered and on purchase order.

Refresh the gadget to pick up recent processing changes including supplier purchase orders, customer orders and invoices with product lines, goods received notes and supplier invoices.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all products with available quantity negative. Inactive Products displayed in red.
- **Active** – displays active products with available quantity negative.

- **Inactive** – displays inactive products with available quantity negative

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Qty Backordered** to sort in ascending order by backorder quantity; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Suppliers page

Supplier Search

Lists all suppliers (or the search results) in Code order and displays contact details and balance information as well as period-to-date and year-to-date purchases.

Refresh the gadget to pick up recent processing changes including supplier invoices, payments, credit adjustment notes and adjustments as well as masterfile changes (address, phone, contact etc).

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active suppliers
- **Inactive** – displays inactive suppliers
- **All** – displays all customers. Inactive suppliers displayed in red.

Actions that can be performed within this gadget include:

- **Search for a supplier based on various criteria.** This could be part of the supplier name, contact name, phone number, comment, etc. Click the search icon to execute the search.
- **Drill into a supplier.** Click the relevant Code field to open the enquiry screen for that supplier.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **PTD Purch** to sort in ascending order by period to date purchases; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Supplier Balances

Displays supplier balances in descending order (largest at the top), plus unallocated balances and aged balances (90, 60, 30, current).

Refresh the gadget to pick up recent processing changes including supplier invoices, payments, credit adjustment notes and adjustments.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all suppliers. Inactive suppliers displayed in red.
- **Active** – displays active suppliers
- **Inactive** – displays inactive suppliers

Actions that can be performed within this gadget include:

- **Drill into a supplier.** Click the relevant Code field to open the enquiry screen for that supplier.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Supplier** to sort in ascending order by supplier code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Suppliers Due

This gadget displays the details of outstanding supplier invoices in Due Date sequence, with the oldest at the top. The Balance displayed is the invoice Amount less any payments, credit notes or adjustments. Overdue invoices are shown in red.

Refresh the gadget to pick up recent processing changes including supplier invoices, payments, credit adjustment notes and adjustments.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue invoices
- **Today** – displays all invoices due today
- **This Week** – displays all invoices due this week
- **This Month** – displays all invoices due this month
- **All** – displays all outstanding invoices

Actions that can be performed within this gadget include:

- **Drill into a supplier.** Click the relevant Code field to open the enquiry screen for that supplier.
- **Drill into an invoice.** Click the relevant Inv No field to open the lookup screen for that invoice.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Balance** to sort in ascending order by invoice balance; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a supplier code and choose Filter By Selection to see outstanding invoices for that particular supplier. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Deliveries Due

Displays active supplier purchase orders. Purchase order details are also shown including purchase order number and date, total value, supplier name and supplier country. Data is in delivery date order, ascending (most overdue items appear at the top). Overdue orders are displayed in red.

Refresh the gadget to pick up recent processing changes including supplier purchase orders, goods received notes and supplier invoices.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue Purchase Orders

- **Today** – displays all Purchase Orders due today
- **This Week** – displays all Purchase Orders due this week
- **This Month** – displays all Purchase Orders due this month
- **All** – displays all outstanding Purchase Orders

Actions that can be performed within this gadget include:

- **Drill into a supplier.** Click the relevant Supplier Code to open the enquiry screen for that supplier.
- **Drill into a purchase order.** Click the relevant PO No field to open the lookup screen for that purchase order.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total** to sort in ascending order by purchase order total; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a supplier code and choose Filter By Selection to see deliveries due from that particular supplier. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Sales page

Top Sales

Displays customer sales values (ex-GST) for the last 6 months or 12 months in descending order (largest customers at the top), along with the month-by-month sales values over the same period.

There are 2 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustments.

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Customer field to open the enquiry screen for that customer.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Customer** to sort in ascending order by customer code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Add column totals.** Right-click and select Totals.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Active Orders

Displays active customers orders in delivery date sequence, with the oldest date at the top. Customer name, order value and document date are also included. Overdue orders (i.e. delivery date precedes today's date) are highlighted in red.

Refresh the gadget to pick up recent processing changes including customer orders and invoices.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays all overdue active customer orders
- **Today** – displays all active customer orders due today
- **This Week** – displays all active customer orders due this week
- **This Month** – displays all active customer orders due this month
- **All** – displays all active customer orders

Actions that can be performed within this gadget include:

- **Drill into a customer.** Click the relevant Code field to open the enquiry screen for that customer.
- **Drill into an order.** Click the relevant Order No field to open the lookup screen for that invoice.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Total** to sort in ascending order by order value; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see active orders for that particular customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Sales Register

Displays customer sales and credits in descending order (most recent at the top). See Total (includes GST), Sales Value (before discount), Discount, Tax, Cost and %GP. The Sales Rep is shown per the invoice and the Period is also displayed.

Refresh the gadget to pick up recent processing changes including customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Sales made today
- **This Week** – displays all Sales made this week
- **This Month** – displays all Sales made this month
- **12 Months** – displays last 12 months Sales

Actions that can be performed within this gadget include:

- **Drill into an invoice or credit.** Click the relevant Doc No to open the document lookup screen.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **%GP** to sort in ascending order by gross profit; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Sales Rep code and choose Filter By Selection to see sales relating to that particular rep. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Product Sales Register

Displays product sales and credits in descending order (most recent at the top). Invoice values are displayed: Value (includes GST), Cost and Tax. The product description is also displayed.

Refresh the gadget to pick up recent processing changes: customer invoices and credit adjustment notes.

There are 4 Gadget Tool Bar Buttons:

- **Today** – displays all Product Sales made today
- **This Week** – displays all Product Sales made this week
- **This Month** – displays all Product Sales made this month
- **12 Months** – displays last 12 months Product Sales

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **Drill into an invoice (or credit note).** Click the relevant Doc No to open the lookup screen for that invoice or credit.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Qty** to sort in ascending order by product quantity sold; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Product code and choose Filter By Selection to see sales of that particular product. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Monthly Sales

Displays product sales values for the last 6 months in descending order (biggest sellers at the top), along with the month-by-month sales values over the same period.

Refresh the gadget to pick up recent processing changes including customer invoices and credit adjustments.

There are 6 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.
- **$ Value** – displays sales in $ value.
- **Qty** – displays sales in quantity.
- **Incl Sund** – includes sundry lines in the calculations.
- **Excl Sund** – excludes sundry lines in the calculations.

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.

- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Product** to sort in ascending order by product code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

BackOrders

Displays active product lines on customer orders that have a backorder quantity. Data is in document number order ascending, so the most overdue items appear at the top. Order details are also shown including customer code and name, unit price and line total.

Refresh the gadget to pick up recent processing changes including customer orders, customer invoices and backorder release.

There are 5 Gadget Tool Bar Buttons:

- **Overdue** – displays overdue product backorders orders
- **Today** – displays product backorders due today
- **This Week** – displays product backorders due this week
- **This Month** – displays product backorders due this month
- **All** – displays all product backorders orders

Actions that can be performed within this gadget include:

- **Drill into a product.** Click the relevant Product field to open the enquiry screen for that product.
- **Drill into a customer order.** Click the relevant Order field to open the lookup screen for that customer order.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Product** to sort in ascending order by product code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a customer code and choose Filter By Selection to see all backorders for that particular customer. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

General Ledger tab

Key performance indicators (KPIs) give a snapshot of the business performance at a given point in time. ClearView displays standard KPIs so performance can be continually monitored.

KPI data updates upon logging into ClearView. To recalculate the data while logged into ClearView, go to the Home page (via the Home icon in the ClearView toolbar) then go back to the GL tab.

You can only view gadgets on this tab if you have setup Financial Ratio Sets in the General Ledger and have access to the General Ledger Enquiry program.

For more information on how ratios work and how to setup the accounts used to calculate ratios, refer to Understanding Attaché ClearView Financial Ratios in the Documentation section of the Attaché Members website.

You can add create your own gadgets and add them to the My GL page. See Creating new gadgets for more information.

Operating Ratios

Operating ratios measure the profitability and financial soundness of a business.

Trade Debtor (Days)

This ratio indicates your level of outstanding accounts receivable and measures how quickly you are collecting outstanding debts from customers. There is general agreement among financial advisors that the faster a company collects its receivables, the better. The sooner customers pay their bills, the sooner a company can put the cash in the bank, pay down debt, or start making new products. There is also a smaller chance of losing money to delinquent accounts.

Trade Debtors (Days) = Debtors / (Credit Sales/365)

Trade Debtors Ratio = Credit Sales / Debtors

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
11125	$35,109.50	$46,420.50	$186,591.00	$463,487.00	$44,200.00
11125	$35,109.50 x12	$46,420.50 x12	$186,591.00	$463,487.00	$44,200.00 x12
84100	$100,880.31	$98,510.67	$98,510.67	$9,738.69	$0.00
	87.40	64.55		7.67	
	4.18	5.65		47.59	

Stock Turn (Days)

This is a very important ratio and shows how quickly you are converting stock into sales. Most financial advisors would suggest that a good stock turn ratio is 4 (turning over stock every 3 months) but averages vary depending on the industry. Stock turn, measured in days, will be high if you are carrying excess stock or redundant stock.

Stock Turn Days = Average Stock / (Annual Cost of Sales/365)

Stock Turn Ratio = Annual Cost of Sales / Average Stock

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
12999	$22,141.23	$26,922.33	$98,902.69	$301,883.15	$24,000.00
12999	$22,141.23 x12	$26,922.33 x12	$98,902.69	$301,883.15	$24,000.00
84200	$35,417.29	$30,907.10	$30,907.10	$23,070.33	$0.00
	48.65	34.92		27.89	
	7.50	10.45		13.09	

Operating Cycle (Days)

This ratio shows how efficiently you are converting stock purchases into sales through to trade debtors then to cash in the bank and finally pay creditors. The quicker the turn-around, the more efficiently you are converting stock into cash-flow. A short operating cycle is optimal for cash flow and profitability as there is less chance of obsolescent and slow moving stock accumulating and similarly fewer bad debts, resulting in funds being more readily available to deposit and pay trade creditors. The ratio is determined by the number of days that stock is held plus the number of days required to collect the debt.

Operating Cycle (Days) = Stock/(Cost of Sales/365) + Debtors/(Credit Sales/365)

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
12999	$22,141.23	$26,922.33	$98,902.69	$301,883.15	$24,000.00
12999	$22,141.23 x12	$26,922.33 x12	$98,902.69	$301,883.15	$24,000.00 x12
84200	$35,417.29	$30,907.10	$30,907.10	$23,070.33	$0.00
11125	$35,109.50	$46,420.50	$186,591.00	$463,487.00	$44,200.00
11125	$35,109.50 x12	$46,420.50 x12	$186,591.00	$463,487.00	$44,200.00 x12
84100	$100,880.31	$98,510.67	$98,510.67	$9,738.69	$0.00
	136.05	99.47		35.56	

Trade Creditor (Days)

This ratio measures how quickly you are paying your accounts. If this ratio, measured in days, is high it could lead to a breach of your suppliers 'trade terms'.

Trade Creditors (Days) = Average Creditors / (Annual Credit Purchases/365)

Trade Creditors Ratio = Annual Credit Purchases / Average Creditors

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
12200	$22,140.86	$27,895.71	$99,876.00	$301,867.58	$0.00
12200	$22,140.86 x12	$27,895.71 x12	$99,876.00	$301,867.58	$0.00
85300	$47,454.73	$84,115.10	$84,115.10	$17,723.03	$0.00
	65.19	91.72		21.43	
	5.60	3.98		17.03	

Profitability Ratios

This page displays some of the most commonly used profitability ratios.

Gross Profit Margin (%)

Your Gross Profit Margin measures your trading profit before expenses are paid and indicates whether your mark-up is adequate. This ratio, in most businesses, is greater than 33%. Each industry has averages which can be used as a benchmark.

Gross Profit Margin (%) = Gross Profit / Total Operating Revenue x 100

Gross Profit Ratio = Gross Profit / Total Operating Revenue

Acc.	Previous	1-Current	2-YTD	3-Last Year	Budget
11999	$35,109.50	$46,420.50	$186,591.00	$463,487.00	$44,200.00
12999	$22,141.23	$26,922.33	$98,902.69	$301,883.15	$24,000.00
	$12,968.27	$19,498.17	$87,688.31	$161,603.85	
		42.00%	46.99%	34.87%	
		0.42	0.47	0.35	

Operating Profit Margin (%)

This ratio measures your net trading profit. For a small business this percentage should always be more than 10% which means that after expenses, the profit should be more than ten cents from each dollar of sales.

Operating Profit Margin (%) = Operating Profit / Total Operating Revenue x 100

Operating Profit Ratio = Gross Profit / Total Operating Revenue

Acc.	Previous	1-Current	2-YTD	3-Last Year	Budget
11999	$35,109.50	$46,420.50	$186,591.00	$463,487.00	$44,200.00
12999	$22,141.23	$26,922.33	$98,902.69	$301,883.15	$24,000.00
	$12,968.27	$19,498.17	$87,688.31	$161,603.85	$20,200.00
17999	$100.00	$100.00	$200.00	$45,680.00	$0.00
	$12,868.27	$19,398.17	$87,488.31	$115,923.85	$20,200.00
	36.65%	41.79%	46.89%	25.01%	45.70%
	0.37	0.42	0.47	0.25	0.46

Net Profit Margin (%)

This ratio shows your net profit margin prior to deducting interest on borrowings and income tax.

Net Profit (%) = Net Profit / Total Revenue x 100

Net Profit Ratio = Net Profit / Total Revenue

Acc.	Previous	1-Current	2-YTD	3-Last Year	Budget
	$12,868.27	$19,398.17	$87,488.31	$115,923.85	$20,200.00
14600	$11,702.21	$555.12	$6,784.38	$15,898.53	$14,000.00
	$24,570.48	$19,953.29	$94,272.69	$131,822.38	$34,200.00
		42.48%	48.75%	27.50%	
		0.42	0.49	0.27	

Liquidity Ratios

Liquidity ratios show the ability of a business to quickly generate the cash needed to pay bills.

Current Ratio

Current assets should be twice the value of current liabilities, hence the ratio should be greater than 2, for the business to be in a good liquid position and able to meet all future commitments.

Current Ratio = Current Assets / Current Liabilities

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
84900	$450,150.84	$517,133.83	$517,133.83	$178,952.09	$0.00
85900	$232,601.54	$280,929.42	$280,929.42	$24,732.06	$0.00
	1.94	1.84	1.84	7.24	

Acid Test (Quick Test)

As it compares current assets less stock to current liabilities, if this ratio is greater than 1, it indicates that the business is in a good position. By excluding inventories it concentrates on the really liquid assets, with value that is fairly certain. It helps answer the question: “If all sales revenues should disappear, could my business meet its current obligations with the readily convertible ‘quick’ funds on hand?”.

Acid Test = (Current Assets – Stock) / Current Liabilities

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
84900	$450,150.84	$517,133.83	$517,133.83	$178,952.09	$0.00
84200	$35,417.29	$30,907.10	$30,907.10	$23,070.33	$0.00
85900	$232,601.54	$280,929.42	$280,929.42	$24,732.06	$0.00
	1.78	1.73	1.73	6.30	

Gearing Ratio

This accounting management ratio measures your longer-term borrowings as against the equity in your business. Your equity should be greater than these borrowings. Borrowings may increase, depending on your circumstances, but they need to be managed very carefully to ensure that repayments can be made on due dates or renegotiated on favourable terms.

Gearing Ratio = Long Term Liabilities / Owners Equity

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
86200	$80,000.00	$80,000.00	$80,000.00	$80,000.00	$0.00
87900	$346,236.06	$364,891.18	$364,891.18	$282,906.80	$0.00
	0.23	0.22	0.22	0.28	

Debt to Equity Ratio

The debt ratio gives an indication of the level of debt to equity. The right level of debt for a business depends on many factors.

Debt to Equity = Total Liabilities / Owners Equity

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
86999	$312,601.54	$360,929.42	$360,929.42	$104,732.06	$0.00
87900	$346,236.06	$364,891.18	$364,891.18	$282,906.80	$0.00
	0.99	0.99	0.99	0.37	

Efficiency Ratios

Asset Turnover

This accounting management ratio shows how efficiently your total assets are being utilised by the business. If the ratio is less than 1, you will need to analyse your assets to ensure that you have not invested too heavily in non-productive assets.

Asset Turnover = Annual Revenue / Total Assets

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
14999	$11,702.21	$18,555.12	$81,784.38	$150,898.53	$44,200.00
14999	$11,702.21 x12	$18,555.12 x12	$81,784.38	$150,898.53	$44,200.00
84999	$658,837.60	$725,820.60	$725,820.60	$387,638.86	$0.00
	0.21	0.31	0.11	0.39	

Return on Asset Ratio

The return on assets ratio indicates how effectively the assets of your business are working to generate profit.

Return on Assets = Net Profit / Total Assets

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
	$24,570.48	$19,953.29	$94,272.69	$223,182.38	$58,200.00
	$24,570.48 x12	$19,953.29 x12	$94,272.69	$223,182.38	$58,200.00
84999	$658,837.60	$725,820.60	$725,820.60	$387,638.86	$0.00
	0.45	0.33	0.13	0.58	

Return on Equity (ROE)

The most common measure of profitability is Return on Equity (ROE). The ROE looks at net profit/total equity as a measure of the financial return being generated by a company's assets. Generally, a target ROE is set based on a risk adjusted target rate of return, set using a capital asset pricing model, or similar.

ROE = Net Profit / Owners Equity

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
	$24,570.48	$19,953.29	$94,272.69	$223,182.38	$58,200.00
	$24,570.48 x 12	$19,953.29 x 12	$94,272.69	$223,182.38	$58,200.00
87900	$346,236.06	$364,891.18	$364,891.18	$282,906.80	$0.00
	0.85	0.66	0.26	0.79	

Working Capital per Dollar of Sales

To find the approximate amount of working capital a company should have, you should look at "working capital per dollar of sales." In other words, you are going to have to compare the amount of working capital on the balance sheet to the total sales.

Working Capital / Dollar of Sales = Working Capital / Total Operating Revenue

Acc.	1-Previous	Current	YTD	2-Last Year	Budget
84900	$450,150.84	$517,133.83	$517,133.83	$178,952.09	$0.00
85900	$232,601.54	$280,929.42	$280,929.42	$24,732.06	$0.00
	$217,549.29	$236,204.41	$236,204.41	$154,220.03	
14999	$11,702.21	$18,555.12	$81,784.38	$150,898.53	$44,200.00
	$11,702.21 x12	$18,555.12 x12	$81,784.38	$150,898.53	$44,200.00
	1.55	1.06	2.89	1.02	

Payroll tab

General information about payroll and employees is available from the Payroll tab pages.

You can add create your own gadgets and add them to the My Payroll page. See Creating new gadgets for more information.

Note: Only operators with the appropriate menu access rights will see this tab. See Setups for more information.

Payroll Home page

Staff Calendar

Displays active Tasks for the selected sales Rep based on the Next Date (due date). By default you'll see 'Today' mode, which shows overdue tasks and reminders in red.

Refresh the gadget to see changes made to existing tasks, or tasks added by other staff and coded to your Rep code.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active tasks for the above date ranges.
- **Complete** – displays complete tasks for the above date ranges.
- **All** – displays all tasks for the above date ranges.

Actions that can be performed within this gadget include:

- **Drill into a task.** Click the relevant Details field to open the task.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **See your upcoming tasks.** Click This Week, Next Week, This Month, Next Month to see all active tasks with the Next Date within this range.
- **See your future tasks.** Bolded dates in the calendar indicate that you have at least one item scheduled for this date. Click the date to see details.
- **See tasks for a different Attaché user.** Change the Rep code in the ClearView toolbar to see tasks assigned to a different person. Note: this is only available if configured in ClearView Options.
- **Add tasks and reminders for yourself or others.** Type details into the task bar then press the Plus sign. If adding a leave request, use a Contact Type in the format Payr_Leave* so it will be included in the Upcoming Leave gadget. For more details see *Creating Task and Reminders*.
- **See more details.** Use the navigation arrows to scroll to future months, or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Type** to sort tasks by contact type. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click an employee code and choose Filter By Selection to see active tasks for that particular employee. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Birthdays

Displays all employees (excluding terminated employees) whose birthday falls into the current month. The age displayed is the current age based on the system date. The employee's Group is also displayed.

Refresh the gadget to pick up recent employee masterfile changes.

There are 6 Gadget Tool Bar Buttons:

- **Month** – displays birthdays this month.
- **Week** – displays birthdays this week.

- **Today** – displays birthdays today.
- **All** – displays all birthdays.
- **Active** – filters out terminated and inactive employees.
- **All** – displays all employees including terminated and inactive employees.

Actions that can be performed within this gadget include:

- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Age** to sort in ascending order by employee age; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Anniversaries

Displays all employees whose start-date anniversary falls into the current month, excluding newly started and terminated employees. The Years of service displayed is as at their anniversary. The employee's Group is also displayed.

Refresh the gadget to pick up recent employee masterfile changes.

There are 6 Gadget Tool Bar Buttons:

- **Month** – displays Anniversaries this month.
- **Week** – displays Anniversaries this week.
- **Today** – displays Anniversaries today.
- **All** – displays all Anniversaries.
- **Active** – filters out terminated and inactive employees.
- **All** – displays all employees including terminated and inactive employees.

Actions that can be performed within this gadget include:

- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Years** to sort in ascending order by years of service; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Negative Leave

Displays all employees (excluding terminated employees) who have exceeded their entitlements for annual or sick leave types.

Refresh the gadget to pick up recent processing including employee masterfile changes and processed pays.

There are 4 Gadget Tool Bar Buttons:

- **Negative** – displays employees with negative leave. .
- **All** – displays all employees leave summary. .
- **Active** – displays all active employees.
- **All** – displays all employees including inactive and terminated employees.

Actions that can be performed within this gadget include:

- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **SL Days** to sort in ascending order by sick leave entitlement; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Employee Details page

Other than the Employee Search, all gadgets on this page are focussed toward a specific employee.

To see data in these gadgets you must first select an employee. To do this, find the employee via the Employee Search gadget, then click the Employee Name.

You'll notice that the captions of the employee-focussed gadgets now include the employee code (e.g. "ADEJ Pay History"). You can drill into the selected employee by clicking the employee code in the gadget caption.

To change to a different employee, search and select again via the Employee Search gadget.

Employee Search

Lists all employees (or the search results) in Code order and displays annual and sick leave entitlement information as well tax file number and date of birth.

Refresh the gadget to pick up recent processing changes including masterfile changes and processed pays.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all employees. Inactive or terminated employees are displayed in red.
- **Active** – displays active employees
- **Inactive** – displays inactive and terminated employees

Actions that can be performed within this gadget include:

- **Search for an employee based on various criteria.** This could be part of the employee name, address, phone number etc. Click the search icon to execute the search.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **AL Days** to sort in ascending order by annual leave entitlement; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.
- **Select an employee to see more details.** Click the Employee Name field to populate the other fields on this Page with details relating to the selected employee.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Summary

Displays contact details and wage information for the selected employee.

To see data in this gadget you must first select an employee via the Employee Search gadget (click the Employee Name field).

There is 1 Gadget Tool Bar Button:

- **Enquire** – Opens the Employee Enquiry form for the currently selected employee.

Active Pay Details

Displays the details of any active (unprocessed) pay that exists for the selected employee.

To see data in this gadget you must first select an employee via the Employee Search gadget (click the Employee Name field).

Refresh the gadget to pick up recent processing changes including timesheets, adjustments and processed pays.

There are 4 Gadget Tool Bar Buttons:

- **All** – displays all pay lines.
- **Income** – displays Income
- **Allowances** – displays Allowances
- **Deductions** – displays Deductions

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Cost Code** to sort in ascending order by cost centre; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Leave History

Displays a history of leave paid to the selected employee for income categories A, L, S, T, U and P (Annual, Long service, Sick, Study, Unpaid leave plus Public holidays). Payments via timesheets and adjustments are included, with the most recent records at the top.

To see data in this gadget you must first select an employee via the Employee Search gadget (click the Employee Name field).

Refresh the gadget to pick up recently processed pays.

There are 6 Gadget Tool Bar Buttons:

- **All Leave** – displays all leave history.
- **Annual** – displays Annual leave history
- **Sick** – displays Sick Leave History
- **6 Months** – displays last 6 Months Leave
- **12 Months** – displays last 12 Months Leave
- **All** – displays all Leave

Actions that can be performed within this gadget include:

- **Drill into a pay.** Click a Pay code to drill into the relevant timesheet (or adjustment) pay.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Hrs/Val** to sort in ascending order by leave hours/value taken; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Day and choose Filter By Selection to see all leave taken by the selected employee on this day of the week. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

TIP: When an employee takes more than one day of leave in a pay period, enter each day on a separate timesheet line and include the leave date. This will allow the most detailed analysis.

Pay History

Displays a history of payments made to the selected employee, including auto pays, timesheets and adjustments, with the most recent records at the top. Only processed pays will appear.

To see data in this gadget you must first select an employee via the Employee Search gadget (click the Employee Name field).

Refresh the gadget to pick up recently processed pays.

There are 3 Gadget Tool Bar Buttons:

- **6 Months** – Display Employee Pay History For Last 6 Months.
- **12 Months** – Display Employee Pay History For Last 12 Months
- **All** – Display Employee Pay History

Actions that can be performed within this gadget include:

- **Drill into a pay.** Click a Pay code to drill into the relevant timesheet (or adjustment) pay.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Hours** to sort in ascending order by hours paid; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.

- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Contact History

Displays a history of all contacts (tasks entered via the Staff Calendar) for the selected employee. All Contact Types are shown along with completion status, with the most recent records at the top.

To see data in this gadget you must first select an employee via the Employee Search gadget (click the Employee Name field).

There are 6 Gadget Tool Bar Buttons:

- **Active** – displays active tasks for the employee.
- **Complete** – displays complete tasks for the employee.
- **All Tasks** – displays all tasks for the employee.
- **6 Months** – display last 6 Months Contact History
- **12 Months** – display last 12 Months Contact History
- **All** – displays all Contact History.

Actions that can be performed within this gadget include:

- **Drill into a Task.** Click the Details field to drill into the relevant employee task.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Complete** to sort in ascending order by completion status; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Contact Type and choose Filter By Selection to see all relevant contacts for this employee. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Leave Analysis page

Recent Leave History

Displays leave paid to all employees over the past 12 months for income categories A, L, S, T, U and P (Annual, Long service, Sick, Study, Unpaid leave plus Public holidays). Payments via timesheets and adjustments are included.

Refresh the gadget to pick up recently processed pays.

There are 6 Gadget Tool Bar Buttons:

- **All** – Displays All Pay Leave Lines.
- **AL** – displays Annual leave Lines
- **SL** – displays Sick Leave Lines
- **1 Month** – Displays Leave for Last Month using the All, AL or SL filters.

- **6 Months** – Displays Leave for Last 6 Month using the All, AL or SL filters.
- **12 Months** – Displays Leave for Last 12 Month using the All, AL or SL filters.

Actions that can be performed within this gadget include:

- **Drill into a pay.** Click a Pay code to drill into the relevant timesheet (or adjustment) pay.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Hrs** to sort in ascending order by leave hours taken; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click a Day and choose Filter By Selection to see all leave taken by the selected employee on this day of the week. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

TIP: When an employee takes more than one day of leave in a pay period, enter each day on a separate timesheet line and include the leave date. This will allow the most detailed analysis.

Leave Hours By Month

Displays the total leave hours paid this month and over the past six months, based on the system date. Only processed pays will appear.

The hours displayed are those linked to income types with income category A, L, S, T, U or P (Annual, Long service, Sick, Study, Unpaid leave or Public holiday).

Refresh the gadget to pick up recently processed pays.

There are 2 Gadget Tool Bar Buttons:

- **6 Months** – displays leave hour summary for last 6 months.
- **12 Months** – displays leave hour summary for last 12 months.

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click a month to sort leave hours taken that month in ascending order by product code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Leave Entitlement

Displays employees with a non-zero entitlement for Annual, Sick or Long service leave (excluding terminated staff). Entitlement is displayed in Days.

Refresh the gadget to pick up recently processed pays.

There are 6 Gadget Tool Bar Buttons:

- **All** – displays all leave entitlement.
- **> 20 Days** – displays employees of more than 20 days for focus leave type.
- **Negative** – displays employees with negative leave entitlement for focus leave type.
- **AL** – Sets Annual Leave as the focus leave type.
- **SL** – Sets Sick Leave as the focus leave type..
- **LSL** – Sets Long Service Leave as the focus leave type.

Actions that can be performed within this gadget include:

- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **AL Days** to sort in ascending order by annual leave entitlement; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Upcoming Leave

Displays active employee contacts (tasks entered via the Staff Calendar) with contact types in the format Payr_Leave*. E.g. Payr_Leave, Payr_LeaveAL, Payr_LeaveSL. See Setups for details of how to create new contact types.

Refresh the gadget to see changes made to existing tasks, or tasks added by other staff.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active leave contacts.
- **Complete** – displays complete leave contacts.
- **All** – displays all leave contacts.

Actions that can be performed within this gadget include:

- **Drill into a task.** Click the relevant Details field to open the task.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Type** to sort tasks by contact type. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click an employee code and choose Filter By Selection to see upcoming leave for that particular employee. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Exceptions Reports page

Active Pay Totals

Displays active (unprocessed) pay totals including auto pays, timesheets and adjustments, for all employees ordered by Location and Code. Auto pays need to be checked (generated) before they will appear in the list. Unchecked auto pays will be removed from the list.

If one or more exceptions are detected in a pay, a "Y" will appear in the Check column.

Refresh the gadget to pick up recent processing changes including new or modified timesheet and adjustment pays, checked (or unchecked) auto pays.

There are 2 Gadget Tool Bar Buttons:

- **All** – display all active pays.
- **Issues** – display active pays with issues

Actions that can be performed within this gadget include:

- **Select a pay**. Click the **Description** field of a pay in this list to 'select' the pay. This has the following impact:
  - The *Active Pay Totals All* gadget will now display only lines for the selected pay.
  - If "Y" appears in the Check column of the pay, the *Exception Messages for Selected Pay* gadget will now display relevant messages.
- **Select a different pay**. Click the **Description** field of another pay in this list. This has the same impact as above for the selected pay.
- **Clear the pay selection**. Right-click and select Remove Filter, then click the refresh icon in the gadget toolbar. This has the following impact:
  - The *Active Pay Totals All* gadget will now display lines for all active pays.
  - The *Exception Messages for Selected Pay* gadget will now prompt the operator to select a pay in order to see information.
- **Drill into a pay.** Click a Pay code to drill into the relevant timesheet (or adjustment) pay.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Gross** to sort in ascending order by gross pay; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click "Y" (in the Check column) and choose Filter By Selection to see just the active pays with exceptions detected. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Active Pay Line Details

Displays the line details of all active (unprocessed) pays for all employees, including auto pays, timesheets and adjustments, ordered by employee location and code. Auto pays need to be checked (generated) before they will appear in the list.

Note: If you select a pay in the *Active Pay Totals* gadget, only lines associated with the selected pay will display.

Refresh the gadget to pick up recent processing changes including new or modified timesheet and adjustment pays, checked (or unchecked) auto pays.

Displays an analysis of active (unprocessed) auto pays, timesheets and adjustments. Auto pays need to be checked (generated) before they will be included. Data is ordered by cost centre ascending.

Refresh the gadget to pick up recent processing changes including new or modified timesheet and adjustment pays, checked (or unchecked) auto pays.

There are 8 Gadget Tool Bar Buttons:

- **All** – displays all line types.
- **Income** – displays income.
- **Employer Contributions** – displays employer contributions.
- **Allowances** – displays allowances.
- **Deductions** – displays deductions.
- **Bank** – displays bank lines.
- **Selected Pay** – displays details for selected active pay
- **All** – displays details for all selected pays

Actions that can be performed within this gadget include:

- **Drill into a pay.** Click a Pay code to drill into the relevant timesheet (or adjustment) pay.
- **Drill into an employee.** Click the relevant Code field to open the enquiry screen for that employee.
- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Rate** to sort in ascending order by pay element rate; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click Type E and choose Filter By Selection to see just the superannuation guarantee lines of active pays. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Note: Drill down into employee timesheet and master file is only available if the company you are logged into is your payroll company.

Exception Messages for Selected Pay

Displays all exception messages associated with the selected pay.

To see data in this gadget, select a pay with “Y” in the check column. Do this by clicking the relevant **Description** field in the *Active Pay Totals* gadget.

Note: Exceptions don’t necessarily mean anything is wrong with the pay, they simply highlight there is something that should be checked prior to processing. The exception messages provided are intended to assist the payroll operator in their checking procedures. They do not cover every possible scenario, and it remains the responsibility of the payroll operator to ensure that adequate checking is performed for the individual needs of the business.

Possible exception messages are described in the table below.

Exception message	Appears if
Bank amt not equal to Net	The employee is paid via Bank but their active pay does not include a banking line, or the banking line is not a Remainder type.
Gross Or Net exceeds last	The gross or net value of the active pay exceeds the employee's last pay
Net pay is zero or less	The gross or net value of the active pay is less than or equal to zero
Cost Centre is missing	At least one line of the active pay is missing a cost centre. Comment and super lines (type C and E) are ignored.
Leave loading is missing	The active pay includes annual leave (line type I with code AL) but does not include leave loading (line type A with code LOAD). *Note: This warning will appear even if the employee is not set up to receive lead loading. As most awards provide for leave loading, this caters to the situation where an employee code is incorrectly set up.*
Super Guarantee line is missing	The active pay does not include a super line (line type E).

Active Pay Analysis

Displays an analysis of active (unprocessed) auto pays, timesheets and adjustments. Auto pays need to be checked (generated) before they will be included. Data is ordered by cost centre ascending.

Refresh the gadget to pick up recent processing changes including new or modified timesheet and adjustment pays, checked (or unchecked) auto pays.

There are 5 Gadget Tool Bar Buttons:

- **All** – displays all line types.
- **Income** – displays income.
- **Employer Contributions** – displays employer contributions.
- **Allowances** – displays allowances.
- **Deductions** – displays deductions.

Actions that can be performed within this gadget include:

- **See more details.** Use the navigation arrows to scroll or right-click and select Full Screen View.
- **Change the data sort order.** Click a column heading to sort by that column. E.g. click **Code** to sort in ascending order by pay element code; click again to sort in descending order. This is a temporary change that will be re-set when the page is refreshed.
- **Filter the data.** Use the right-click context menu to see the data you need. E.g. right-click Type A and choose Filter By Selection to see just the allowance lines of active pays. This is a temporary change that will be re-set when the filter is removed or the page is refreshed.
- **Email the data.** Click the Email icon in the gadget toolbar to load the content into the body of a ClearView Email message.

Manager tab

Key performance indicators (KPIs) give a snapshot of the business performance at a given point in time. ClearView displays standard KPIs so performance can be continually monitored.

You can only view gadgets on this tab if you have setup Financial Ratio Sets in the General Ledger and have access to the General Ledger Enquiry program.

For more information on how ratios work and how to setup the accounts used to calculate ratios, refer to Understanding Attaché ClearView Financial Ratios in the Documentation section of the Attaché Members website.

You can add create your own gadgets and add them to the My Manager page. See Creating new gadgets for more information.

Manager Home page

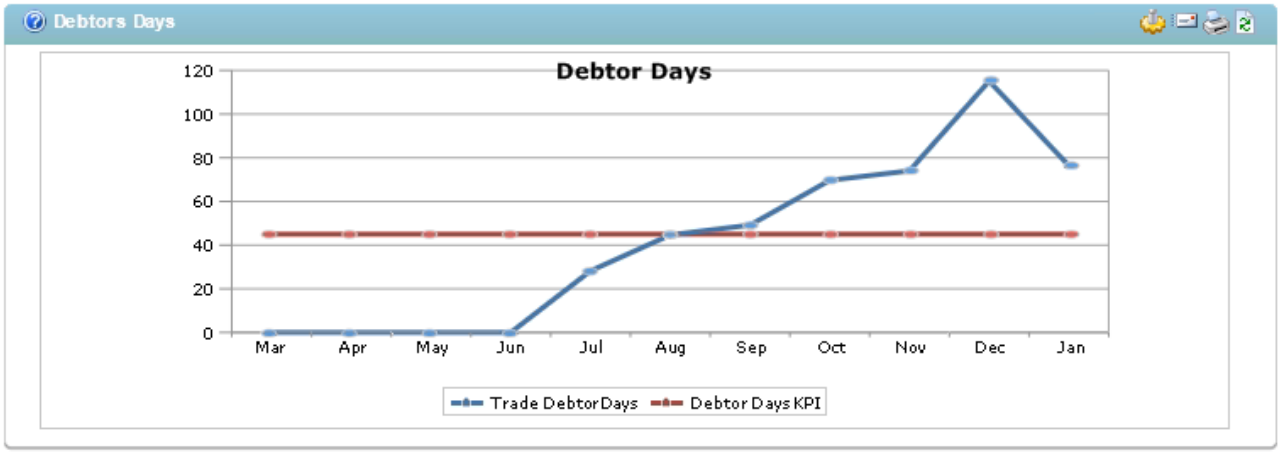
The Gadgets on the Manager Home page of the Managers tab displays information common to most businesses.

Trade Debtor (Days) History

The Debtor Days ratio indicates your level of outstanding accounts receivable and measures how quickly you are collecting outstanding debts from customers.

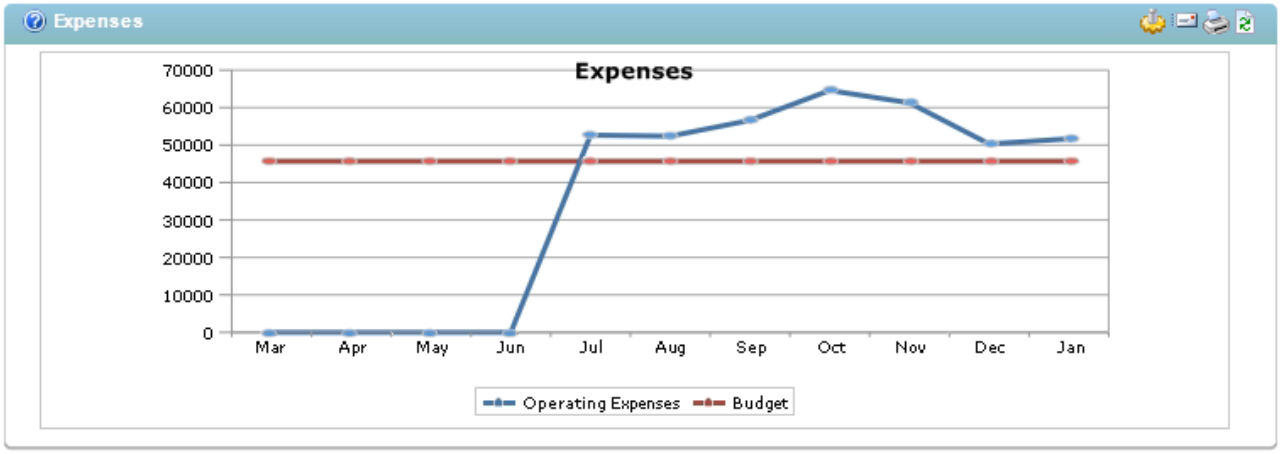
This information is displayed for the last 12 months on a chart. A comparison with the target Debtor Days KPI is also shown.

See Trade Debtor (Days) for more information about how this figure is calculated.



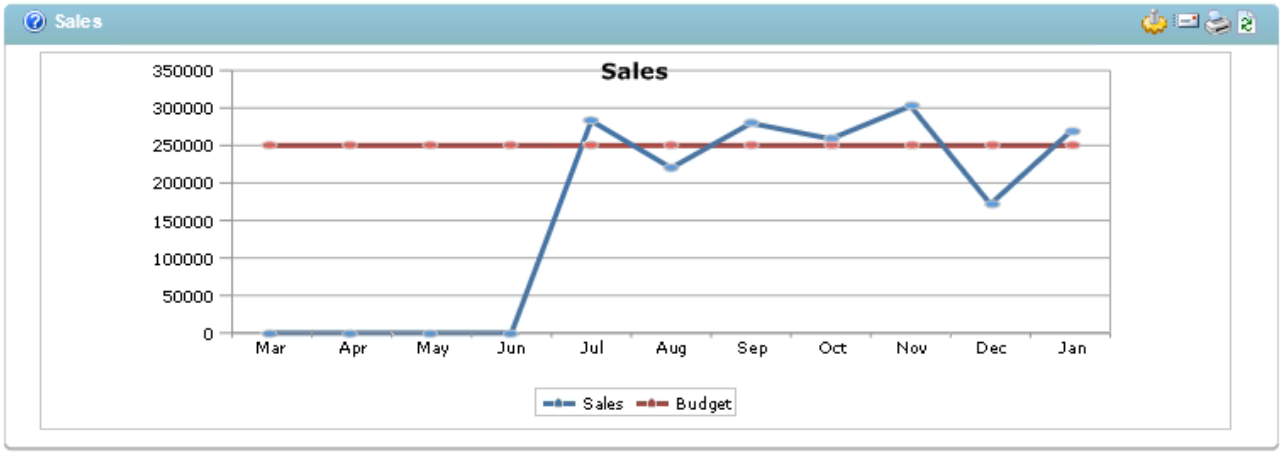
Expenses History

This gadget displays the Operating Expenses history for the last 12 months against the budget in the general ledger.



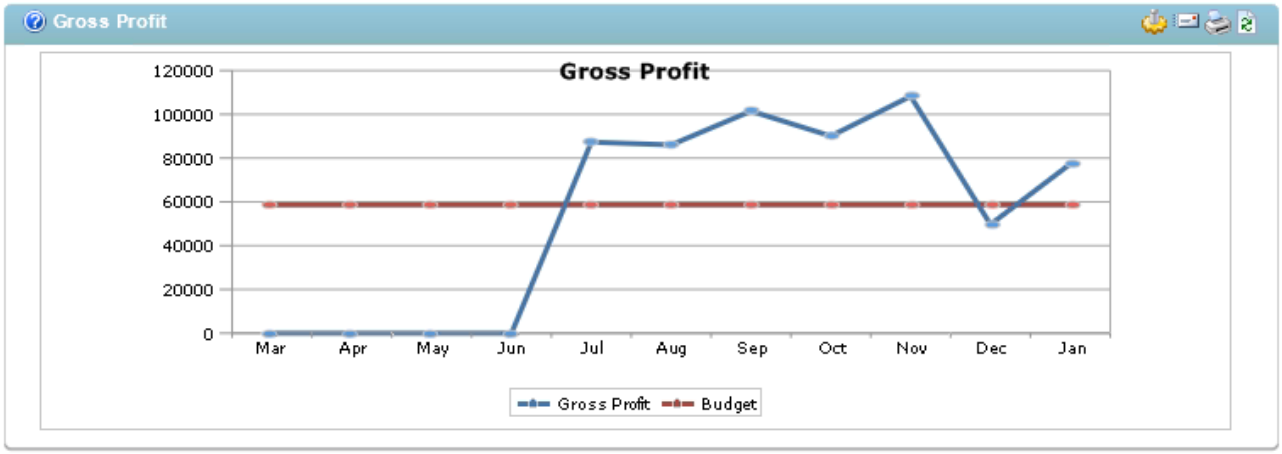
Sales History

This gadget displays the Sales history for the last 12 months against the budget in the general ledger.



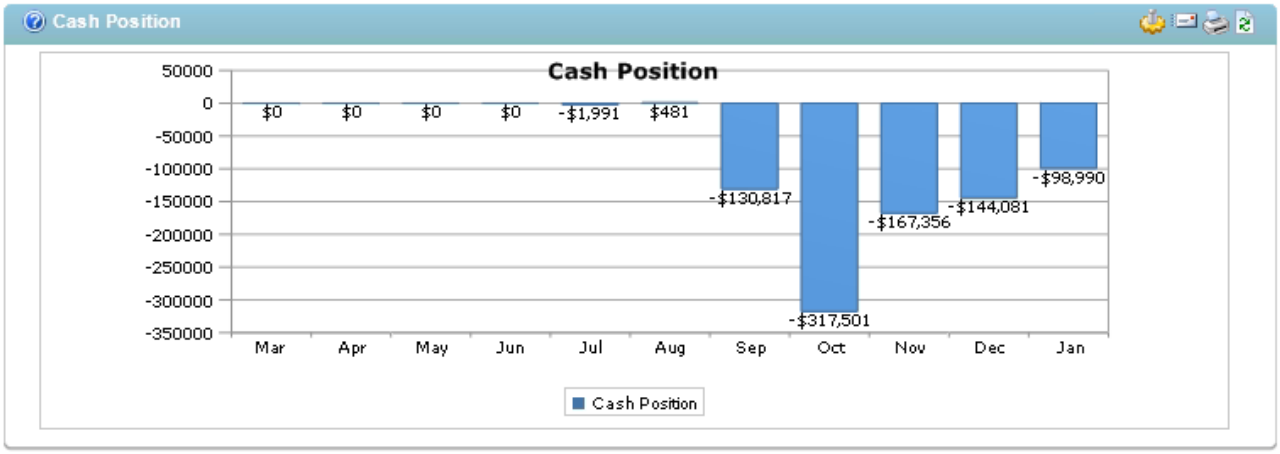
Gross Profit History

This gadget displays the Gross Profit history for the last 12 months against the budget in the general ledger.



Cash Position History

This gadget displays the total of all bank accounts for the last 12 months. If you want an account to be included in this chart, then you need to set it to a General Ledger Type 3 (Bank Account).

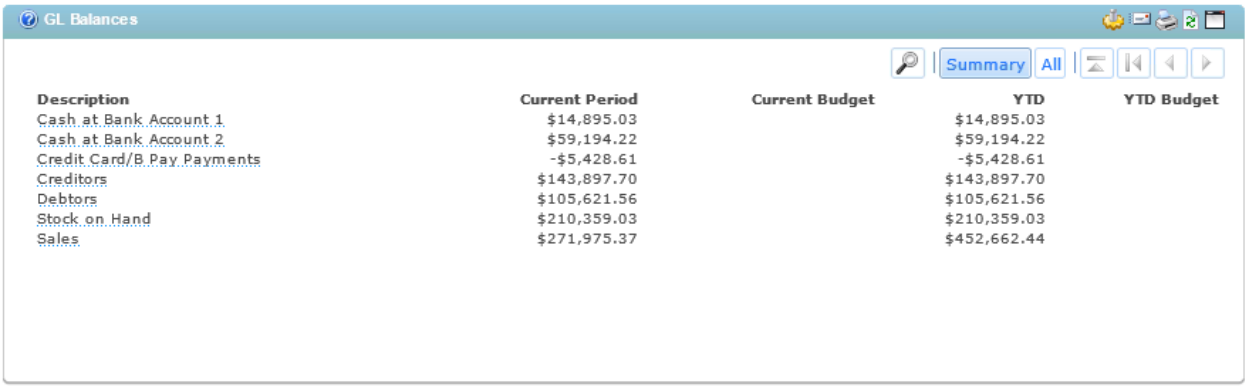


Summary Balances

This gadget displays of GL Balances.

There are 2 Gadget Tool Bar Buttons:

- **Summary** – displays the period and year-to-date balances of key general ledger accounts against the budget in the general ledger.



GL Balances

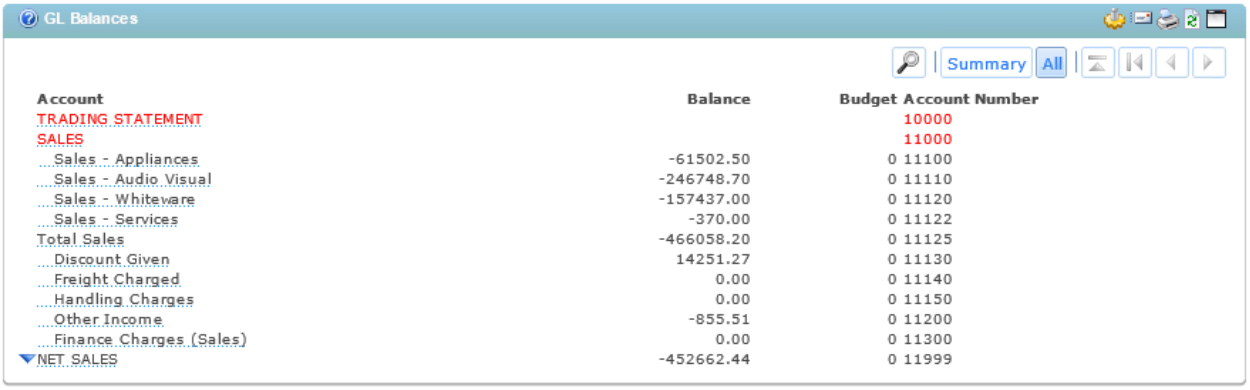
Summary All

Description	Current Period	Current Budget	YTD	YTD Budget
Cash at Bank Account 1	$14,895.03		$14,895.03	
Cash at Bank Account 2	$59,194.22		$59,194.22	
Credit Card/B Pay Payments	-$5,428.61		-$5,428.61	
Creditors	$143,897.70		$143,897.70	
Debtors	$105,621.56		$105,621.56	
Stock on Hand	$210,359.03		$210,359.03	
Sales	$271,975.37		$452,662.44	

- **All** – Displays all GL Accounts including the header accounts and the balances where appropriate.

  You can use the Note Number field on the account masterfile to exclude (8???) accounts from the gadget. E.g. a Bank type account with Note Number set to 8000 will not appear in this gadget.

  The header accounts of type 5 or type 6 will be displayed in Red.



GL Balances

Summary All

Account	Balance	Budget Account Number
TRADING STATEMENT		10000
SALES		11000
Sales - Appliances	-61502.50	0 11100
Sales - Audio Visual	-246748.70	0 11110
Sales - Whiteware	-157437.00	0 11120
Sales - Services	-370.00	0 11122
Total Sales	-466058.20	0 11125
Discount Given	14251.27	0 11130
Freight Charged	0.00	0 11140
Handling Charges	0.00	0 11150
Other Income	-855.51	0 11200
Finance Charges (Sales)	0.00	0 11300
NET SALES	-452662.44	0 11999

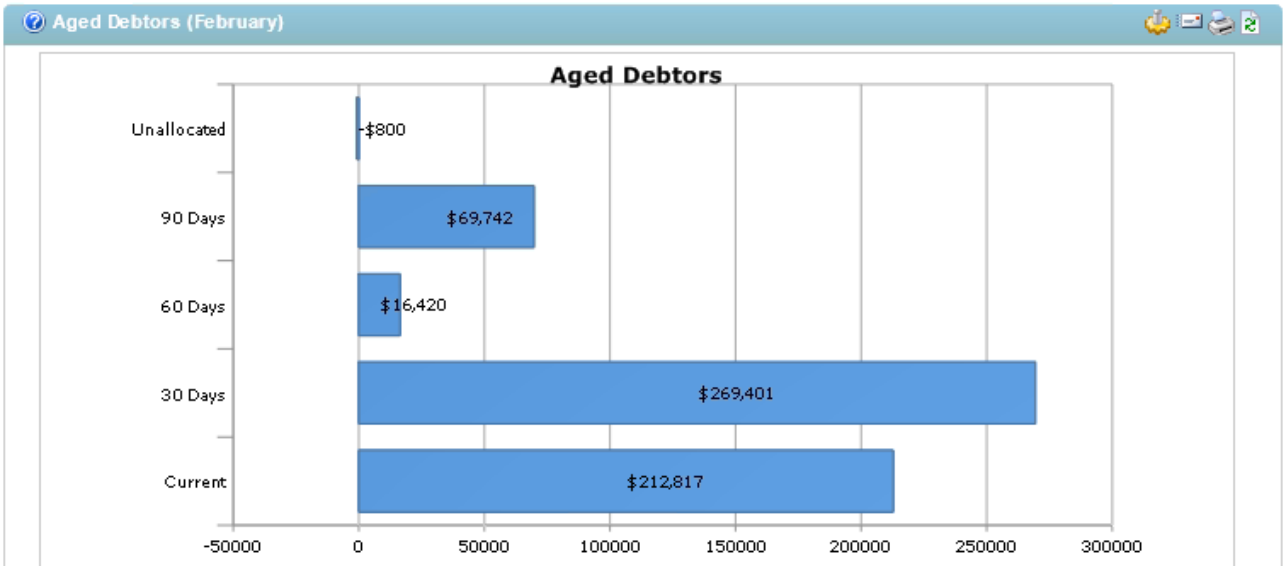
Debtors page

The Gadgets on the Debtors page of the Managers tab displays information about debtors.

Aged Debtors

This gadget displays the Aged Debtors Analysis.

The ageing bands are determined by the Date Based Ageing settings in the Setups | Customers | Options | Customer Options program. Unallocated amounts are shown in a separate band as they warrant special attention. Post dated transactions are included in the Current band.

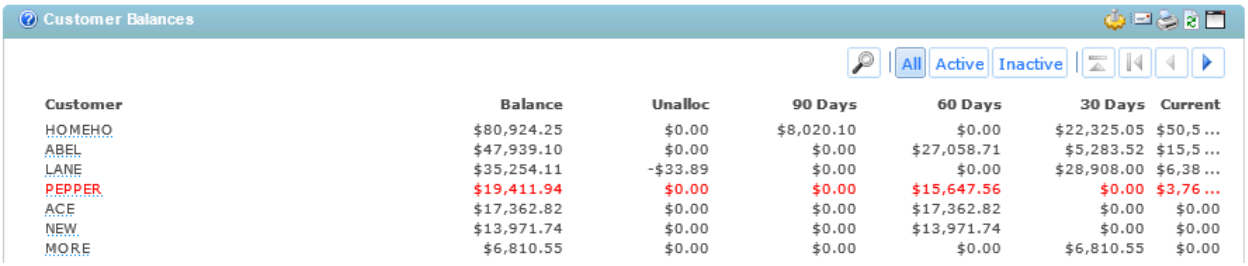


Customer Balances

This gadget displays the balances of your customers with the most overdue customers displayed at the top of the list. Inactive customers are displayed in red.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all customers. Inactive Customers displayed in red.
- **Active** – displays active customers
- **Inactive** – displays inactive customers



Customer	Balance	Unalloc	90 Days	60 Days	30 Days	Current
HOMEHO	$80,924.25	$0.00	$8,020.10	$0.00	$22,325.05	$50,5 ...
ABEL	$47,939.10	$0.00	$0.00	$27,058.71	$5,283.52	$15,5 ...
LANE	$35,254.11	-$33.89	$0.00	$0.00	$28,908.00	$6,38 ...
PEPPER	$19,411.94	$0.00	$0.00	$15,647.56	$0.00	$3,76 ...
ACE	$17,362.82	$0.00	$0.00	$17,362.82	$0.00	$0.00
NEW	$13,971.74	$0.00	$0.00	$13,971.74	$0.00	$0.00
MORE	$6,810.55	$0.00	$0.00	$0.00	$6,810.55	$0.00

Customers Due

This gadget displays outstanding customer invoices.

There are 5 Gadget Tool Bar Buttons:

- **All** – displays all outstanding invoices
- **Overdue** – displays all overdue invoices
- **Today** – displays all invoices due today
- **This Week** – displays all invoices due this week
- **This Month** – displays all invoices due this month

Customers Due

Overdue | Today | This Week | This Month | All

Customer	Due	Balance	Inv No	Reference	Amount	Inv Date
CASH	24/02/2002	$623.70	1088		$623.70	24/02/2002
INTERNAL	27/02/2002	$2,200.00	1089		$2,200.00	27/02/2002
ABEL	10/06/2002	$3,300.00	1091	A103	$3,300.00	10/06/2002
INTERNAL	10/06/2002	$3,300.00	1090		$3,300.00	10/06/2002
DATSIPD	12/06/2002	$22,000.00	1092	A103	$22,000.00	12/06/2002

Customers in Dispute or Exceeded Credit Limit

This gadget displays a list of customers who are either flagged as in dispute, or who have exceeded their credit limit. Inactive Customers are displayed in red.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays Customers In Dispute or Over Credit Limit
- **In Dispute** – displays Customers In Dispute
- **Credit Limit** – displays Customer Over Credit Limit if they are also in dispute the reason will display as in dispute.

Customers In Dispute or Over Credit Limit

All | In Dispute | Credit Limit

Customer	Reason	Balance	Avail Credit	Limit
HOMEBR	In Dispute	$0.00	$60,000.00	$60,000.00
HOMEHO	Credit Limit	$80,924.25	-$20,924.25	$60,000.00
PEPPER	In Dispute	$19,411.94	-$18,411.94	$1,000.00

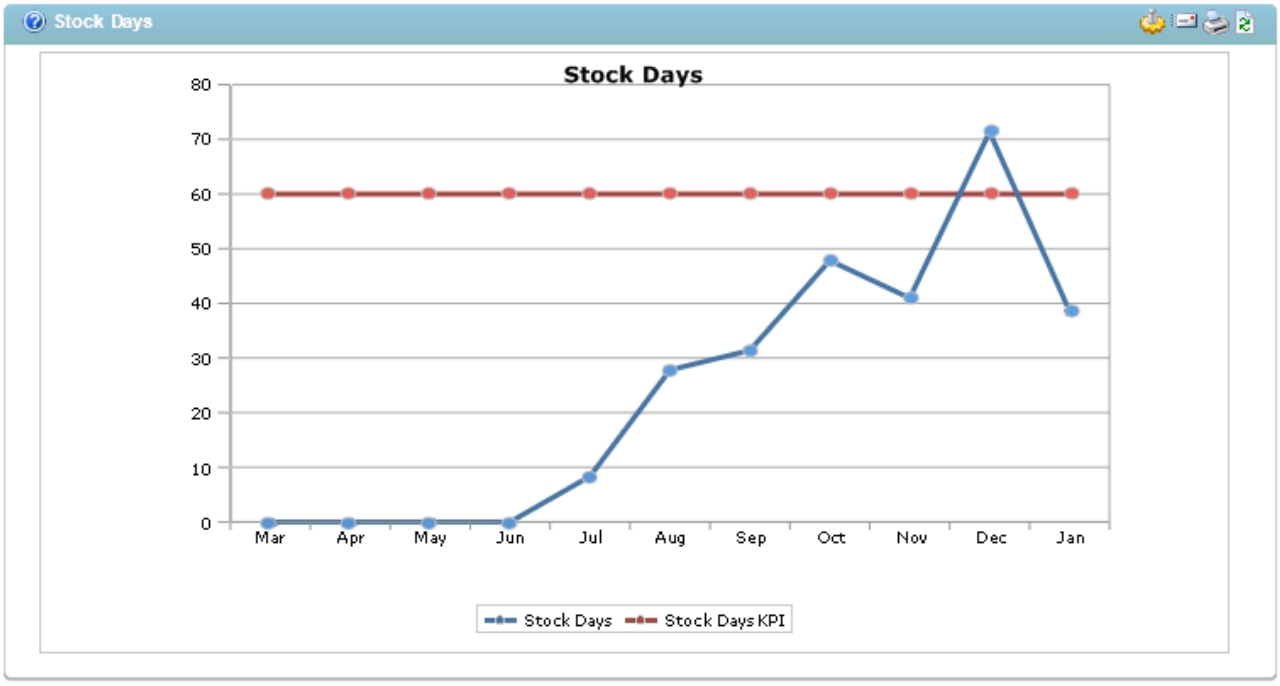
Stock page

The Gadgets on the Stock page of the Managers tab displays information about stock.

Stock Days

This gadget displays the Stock Days history for the last 12 months against the Stock Days KPI.

The KPI can be maintained via the Setups | General Ledger | Financial Ratio Sets | Maintain program.



See Stock Turn (Days) for more information about how this figure is calculated.

Stock on Hand

This gadget displays the Stock on Hand. Products with the highest stock value are shown at the top of the list. Inactive Products are displayed in red.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active products with Stock which has not sold at all or recently.
- **Inactive** – displays inactive products with Stock which has not sold at all or recently.
- **All** – displays all products with products with Stock which has not sold at all or recently.

Stock on Hand

Active Inactive All

Product	Description	In Stk	Value	Last Sale
MICRO	Microwave Oven 800 Watts/27 Litre	81	37297.26	15/10/2009
SOUND	Surround Sound system	43	33475.93	1/02/2013
TOASTER	4 Slice pop-up Toaster	2829	14145.00	15/10/2009
DRYER	Tumble Clothes Dryer 6.5 kg	51	11845.77	2/02/2013
TV68	68cm Digital Colour Television	17	8500.00	10/09/2009
DISH2	Dishwasher - Elite	7	5785.50	15/02/2013
TV34	34cm Colour Television with Teletext	12	4651.20	10/09/2009
IRON	Cordless Steam Iron	670	3939.60	15/10/2009
AMP	Stereo Amplifier	4	1213.24	28/02/2013
ADEDISH	Dishwasher - Programmable Push Button	2	662.32	
ADEAMP	Stereo Amplifier	2	606.62	
ADECD	CD Player with Remote and Programming	2	427.44	
FERTILISER	A GradeFertiliser	20	403.80	
BLEND	Kitchen Blender	3	226.65	28/02/2013
ADEBLEND	Kitchen Blender	2	211.12	

Slow Moving Stock

This gadget displays the Stock which has not sold at all or recently. Products with the oldest last sale date are shown at the top of the list. Inactive Products are displayed in red.

There are 3 Gadget Tool Bar Buttons:

- **Active** – displays active products with Stock which has not sold at all or recently.
- **Inactive** – displays inactive products with Stock which has not sold at all or recently.
- **All** – displays all products with products with Stock which has not sold at all or recently.

Slow Moving Stock

Active Inactive All

Product	Description	In Stk	Value	Last Sale
ADEDISH	Dishwasher - Programmable Push Button	2	662.32	
ADECD	CD Player with Remote and Programming	2	427.44	
ADEBLEND	Kitchen Blender	2	211.12	
ADEAMP	Stereo Amplifier	2	606.62	
FERTILISER	A GradeFertiliser	20	403.80	
TV68	68cm Digital Colour Television	17	8500.00	10/09/2009
TV34	34cm Colour Television with Teletext	12	4651.20	10/09/2009
TOASTER	4 Slice pop-up Toaster	2829	14145.00	15/10/2009
MICRO	Microwave Oven 800 Watts/27 Litre	81	37297.26	15/10/2009
IRON	Cordless Steam Iron	670	3939.60	15/10/2009
SOUND	Surround Sound system	43	33475.93	1/02/2013
DRYER	Tumble Clothes Dryer 6.5 kg	51	11845.77	2/02/2013
DISH2	Dishwasher - Elite	7	5785.50	15/02/2013
BLEND	Kitchen Blender	3	226.65	28/02/2013
AMP	Stereo Amplifier	4	1213.24	28/02/2013

Negative Stock

This gadget displays Stock with negative balances. Inactive Products are displayed in red.

There are 3 Gadget Tool Bar Buttons:

- **All** – displays all products with available quantity negative. Inactive Products displayed in red.
- **Active** – displays active products with available quantity negative.
- **Inactive** – displays inactive products with available quantity negative

Negative Stock

All Active Inactive

Loc	Product	Qty Available	In Stock	Qty Reserved	Qty Backordered	Qty On PO
	TV34	-1	12	13	10	0
	CD	-68	-45	23	22	0
	DISH	-3	-3	0	5	0
	DVD	-20	0	20	15	0

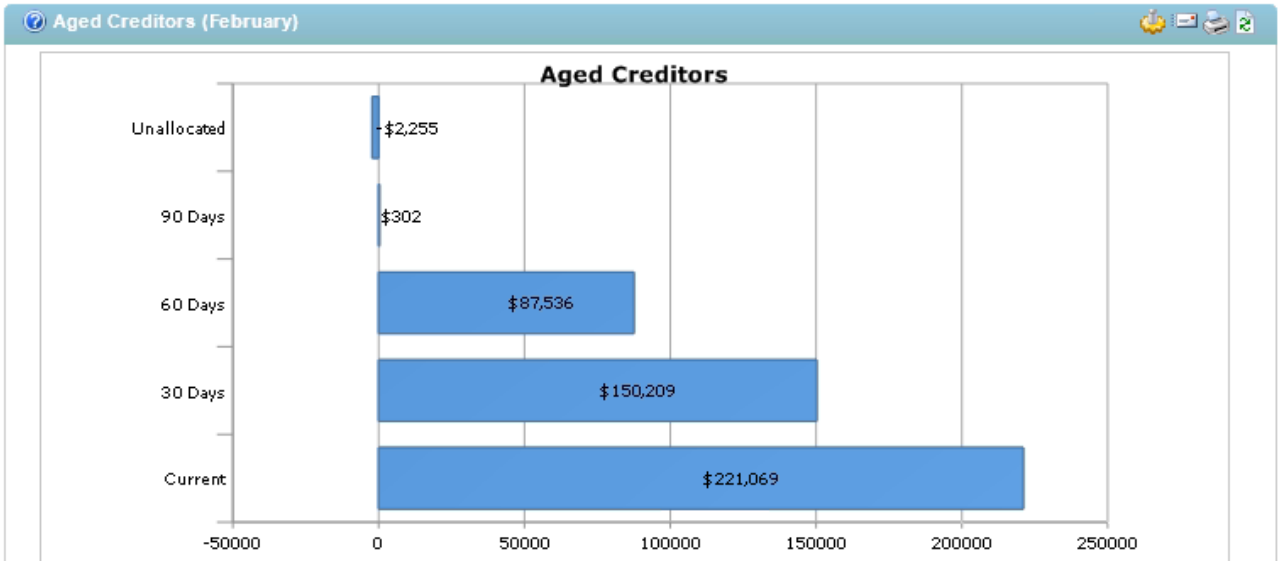
Expenses page

The Gadgets on the Expenses page of the Managers tab displays information about creditors and expenses.

Aged Creditors

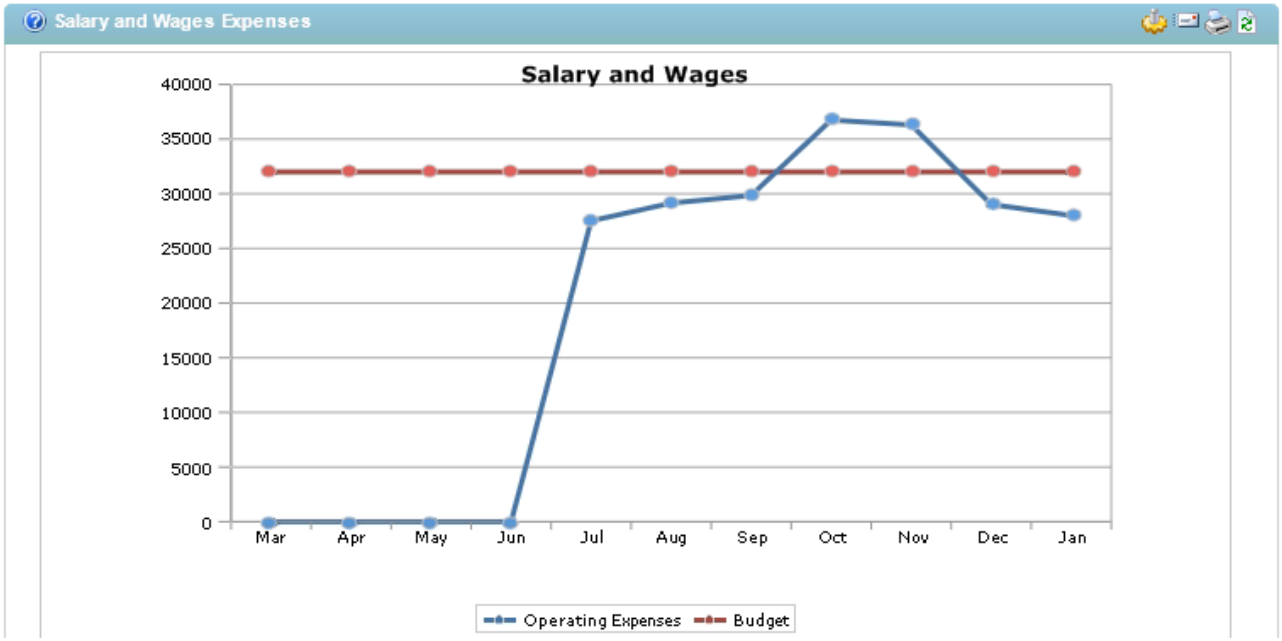
This gadget displays the Aged Creditor Analysis.

The ageing bands are determined by the Date Based Ageing settings in the Setups | Supplier | Options | Supplier Options program. Unallocated amounts are shown in a separate band as they warrant special attention.



Salary and Wages

This gadget displays the Salary and Wages Expenses history for the last 12 months against the general ledger budget.



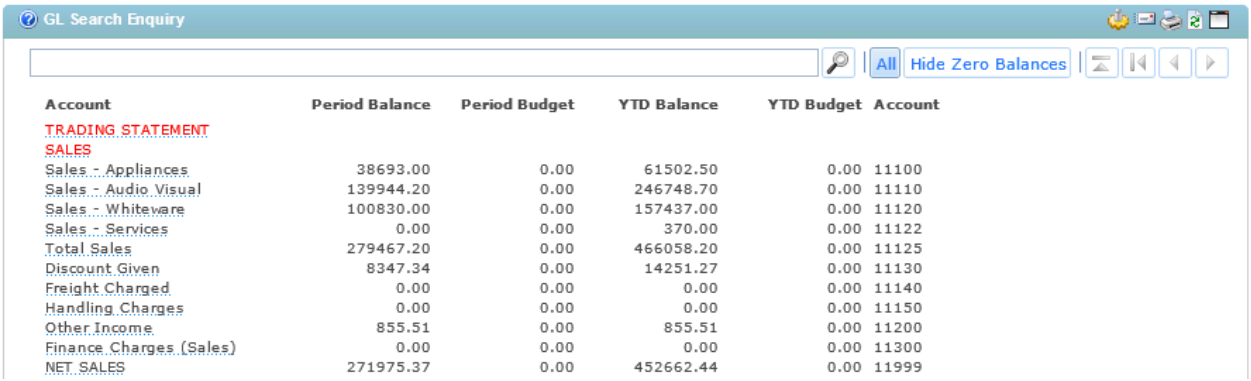
General Ledger Search Enquiry

This gadget displays the YTD and period balances and the general ledger budget for all accounts.

You can search for a specific account using any part of the description.

There are 2 Gadget Tool Bar Buttons:

- **All** – displays all account codes.
- **Hide Zero Balances** – displays only accounts that have any non-zero balances.



Account	Period Balance	Period Budget	YTD Balance	YTD Budget	Account
TRADING STATEMENT					
SALES					
Sales - Appliances	38693.00	0.00	61502.50	0.00	11100
Sales - Audio Visual	139944.20	0.00	246748.70	0.00	11110
Sales - Whiteware	100830.00	0.00	157437.00	0.00	11120
Sales - Services	0.00	0.00	370.00	0.00	11122
Total Sales	279467.20	0.00	466058.20	0.00	11125
Discount Given	8347.34	0.00	14251.27	0.00	11130
Freight Charged	0.00	0.00	0.00	0.00	11140
Handling Charges	0.00	0.00	0.00	0.00	11150
Other Income	855.51	0.00	855.51	0.00	11200
Finance Charges (Sales)	0.00	0.00	0.00	0.00	11300
NET SALES	271975.37	0.00	452662.44	0.00	11999

Suppliers Due

This gadget displays Supplier Invoices that still have a balance.

There are 5 Gadget Tool Bar Buttons:

- **All** – displays all outstanding invoices
- **Overdue** – displays all overdue invoices
- **Today** – displays all invoices due today
- **This Week** – displays all invoices due this week
- **This Month** – displays all invoices due this month

Suppliers Due

Overdue | Today | This Week | This Month | All

Supplier	Inv No	Due Date	Amount	Balance	Inv. Date
RICHARD	65656	22/02/2002	$550.00	$250.00	22/02/2002
BASS	7264726	29/03/2002	$110.00	$50.00	27/02/2002
ELCOM	JULY 2002	24/06/2002	$281.60	$281.60	4/06/2002
GRIMES	84748	14/07/2002	$2,640.00	$2,640.00	14/06/2002

Sales page

The Gadgets on the Sales page of the Managers tab displays information about sales.

Customer Monthly Sales

This gadget displays customer sales by value for the last 6 months or 12 months. Customers with the highest sales value are shown at the top of the list.

There are 2 Gadget Tool Bar Buttons:

- **6 Months** – displays customer top sales for last 6 Months
- **12 Months** – displays customer top sales for last 12 Months

Customer Monthly Sales

6 Months | 12 Months

Customer	Last 6 Mths	Aug 13	Jul 13	Jun 13	May 13	Apr 13	Mar 13
ACE	$3,661.07	$0.00	$276.47	$1,702.55	$1,607.50	$45.45	$29.10
ABEL	$2,272.40	$0.00	$1,339.80	$525.40	$0.00	$262.70	$144.50

Customer Declining Sales

This gadget displays customers whose sales have declined in the previous month when compared to the YTD monthly average. Customers with the biggest decline are shown at the top of the list.

There are 7 Gadget Tool Bar Buttons:

- **All** – displays all customers
- **>10%** – displays customer whose sales declined by greater than 10%
- **>25%** – displays customer whose sales declined by greater than 25%
- **>50%** – displays customer whose sales declined by greater than 50%
- **All** – displays all customers.
- **Active** – displays active customers
- **Inactive** – displays inactive customers

Customer Declining Sales

All | >10% | >25% | >50% | All | Active | Inactive

Customer	Sep 13	% Decline	YTD Avg.	Name
ABEL	772.06	5.51%	817.12	Abel Sound Systems Pty Ltd
ACE	274.55	-57.43%	174.39	Ace Kitchens Pty Ltd

Product Monthly Sales

This gadget displays product sales by value or Quantity for the last 6 or 12 months. Products with the highest sales value are shown at the top of the list.

There are 6 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.

- **12 Months** – displays sales information based on previous 12 months sales.
- **$ Value** – displays sales in $ value.
- **Qty** – displays sales in quantity.
- **Incl Sund** – includes sundry lines in the calculations.
- **Excl Sund** – excludes sundry lines in the calculations.

Product Monthly Sales

6 Months | 12 Months | $ Value | Qty | Incl Sund | Excl Sund

Loc	Product	Last 6 Mths	Oct 09	Sep 09	Aug 09	Jul 09	Jun 09	May 09
	CD	$11,163.09	$748.69	$2,312.00	$3,294.60	$2,611.40	$780.30	$1,416.10
	BLEND	$6,800.34	$1,372.75	$1,113.00	$1,359.45	$1,083.50	$1,560.00	$311.64

Sales Rep Monthly Sales

This gadget displays Sales Rep sales by $ value for the last 6 months or 12 months. The Sales Rep with the highest sales value will be shown at the top of the list.

There are 5 Gadget Tool Bar Buttons:

- **6 Months** – displays sales information based on previous 6 months sales.
- **12 Months** – displays sales information based on previous 12 months sales.
- **Master** – displays calculations using the sales rep code on the customer master file.
- **Inv Hdr** – displays calculations using the sales rep code on the sales document header.
- **Inv Det** – displays calculations using the sales rep code on the sales document detail line

Sales Rep Monthly Sales

6 Months | 12 Months | Master | Inv Hdr | Inv Det

Code	Sales Rep Name	Last 6 Mths	Oct 09	Sep 09	Aug 09	Jul 09	Jun 09	May 09
3	Mark Jones	$14,155.00	$0.00	$4,324.00	$5,280.10	$2,210.60	$2,340.30	$0.00
2	Janice Peters	$3,212.04	$0.00	$0.00	$0.00	$1,484.30	$0.00	$1,727.74
1	Rob Smith	$3,033.44	$3,033.44	$0.00	$0.00	$0.00	$0.00	$0.00

Creating Tasks and reminders

Accounts tasks

New accounts tasks are added via the Accounts Home page.

Type the details into the To Do List task bar and click the Plus sign. This launches the Task screen where more details can be added.

To create a future task, you can select the required date in the calendar before adding the task. E.g. to create a reminder for the following Friday, click that date in the calendar then type details into the task bar. This will set the Next Date (due date) appropriately. Alternatively you can simply set the Next Date to the relevant date in the task screen.

Task screen fields:

- **Date:** This is the date the task was entered. It defaults to the current date for new tasks.
- **Contact Name:** Add a contact name if applicable.
- **Sales Rep:** Defaults to the selected Rep code (can be seen in the ClearView toolbar). If the task is to be assigned to a different staff member, change the Sales Rep code so it will appear in their To Do List.
- **Contact Type:** A Contact Type can be assigned to help categorise dealings with customers.
- **Next Date:** This is used when displaying active tasks in the To Do List. When creating a new task, the Next Date defaults to the system date or to a future date if selected in the calendar (see above). The Next Date can be changed if required.
- **Complete:** When a task is finished it can be marked as Complete, which will remove it from the To Do List. If the task is associated with a customer code it will still appear in that customer's contact history.
- **Customer:** You can assign a customer code to a task. If the task doesn't relate to a specific customer, leave this field blank.
- **Follow-Up:** This will mark the current task as Complete and create a new task using details from the current task. This is useful when performing tasks like debt collection.
- **Attach File:** You can attach documents to a task. If attachments already exist, you'll see a paperclip graphic next to the Complete field. View the attachments by clicking on the paperclip. Attachments are copied into the Documents folder for the selected customer.

Payroll tasks

New payroll tasks are added via the Staff Calendar on the Payroll Home page.

Type the details into the Staff Calendar task bar and click the Plus sign. This launches the Task screen where more details can be added.

To create a future task, you can select the required date in the calendar before adding the task. E.g. to create a reminder for next Friday, click that date in the calendar then type details into the task bar. This will set the Next Date (due date) appropriately. Alternatively you can simply set the Next Date to the relevant date in the task screen.

Task screen fields:

- **Date:** This is the date the task was entered. It defaults to the current date for new tasks.
- **Contact Name:** Add a contact name if applicable.
- **Sales Rep:** Defaults to the selected Rep code (can be seen in the ClearView toolbar). If the task is to be assigned to a different staff member, change the Sales Rep code so it will appear in their Staff Calendar. This suits businesses with multiple payroll operators, who each perform separate tasks.
- **Contact Type:** A Contact Type can be assigned to help categorise dealings with employees. To track leave requests (and see them in the Upcoming Leave gadget), use a contact type in the format **Payr_Leave***. See Setups for more information.

- **Next Date:** This is used when displaying active tasks in the Staff Calendar. When creating a new task, the Next Date defaults to the system date or to a future date if selected in the calendar (see above). The Next Date can be changed if required.
- **Complete:** When a task is finished it can be marked as Complete, which will remove it from the Staff Calendar. If the task is associated with an employee code it will still appear in that employee's contact history.
- **Employee:** You can assign a task to an employee by selecting their code. The employee code displayed in the drop-down list starts with the 3-digit company code (required due to handling of external payroll companies). Tasks assigned to an employee will appear in their Contact History. If the task doesn't relate to a specific employee, leave this field blank.
- **Follow-Up:** This will mark the current task as Complete and create a new task using details from the current task. This is useful when performing tasks like employee reviews.
- **Attach File:** You can attach documents to a task. If attachments already exist for a note, you'll see a paperclip graphic next to the Complete field. View the attachments by clicking on the paperclip. Attachments are copied into the Documents folder for the selected employee.

Modifying standard gadgets

When you first use ClearView, the data shown in the gadgets is automatically set for you. There are a number of ways you can modify gadget data to better suit your needs.

By changing a simple gadget property you can change dramatically the way data appears. The most popular properties are discussed here.

You can revert to the original gadget properties by clicking the Reset property button.

Change caption

You can change the words that appear in the gadget's toolbar by changing the **Caption** property.

To do this:

1. Login as a user with "Edit Settings" privileges
2. Select the Gadget Properties icon in the toolbar of the gadget you'd like to change.
3. Change the Caption property field.
4. Press Save.

Change the number of rows or columns

You can change the number of ROWS or COLUMNS displayed in a gadget by changing the Dimension property.

1. Login as a user with "Edit Settings" privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. In the **Dimension** field, click on the selection box ... to bring up the Dimension Builder.
4. The Rows and Columns properties default to AUTO; change this to the number of rows / columns you wish to display, then press Save.

Tip: ClearView will always attempt to display the rows and columns you desire, however this may impact the display of other gadgets. It is suggested that you use AUTO for these settings.

Change the default sort order

You can change the number of order of data displayed in a gadget by changing the SORT property. You can also sort a column by clicking on the column heading.

1. Login as a user with “Edit Settings” privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. Change the **Sort** property to the name of the SQL field name you wish to sort on. Eg. to sort by the customer’s Sales Rep (ascending order) then by the YTD Sales (descending order), type the following into the Sort field: **`CmSRep ASC, CmYSales DESC`**
4. Press Save

TIP: To find out the names of the available fields you can open the “Data Source” using the Report Designer, select SQL and F7-View SQL.

Show (or hide) column headings

You can show or hide column headings using the HEADER property.

1. Login as a user with “Edit Settings” privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. Tick (or untick) the **Heading** property, then press Save

To change the names of the column headings, you need to modify the design of the Data Source using the ClearView Report Designer module (if installed).

Change the gadget format (Type)

There are various types of gadgets. The default (and most common gadget type) is a Table, which displays information in a tabular form.

You can change how the information in a gadget is displayed by changing the Type property.

Change to a Search

Search gadgets restrict the information displayed based on the search criteria typed into the search bar. ClearView includes gadgets for searching products, customers, suppliers and employees.

To change a gadget to a Search:

1. Login as a user with “Edit Settings” privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. Change the **Type** property to SEARCH
4. Check that there is a table reference in the Search Context property (eg. CUST_MAST for customers). If not, click on the selection box ... to bring up the Search Builder then select the relevant search table in the Context field, and set the Input Size (search box size, e.g 40).
5. Press Save.

TIP: ClearView assumes that the first column contains the code field in the Context table. E.g. if Context=PROD_MAST, then ClearView expects the Product location / code field (called CODE) to appear in the first column. If this is not the case, you must use the Codefield property to specify the code field.

Change to a Calendar

Calendar (To Do Bar) gadgets allow you do navigate and display information using a calendar control. Standard To Do Bar gadgets also include a task bar so new tasks can be added.

1. Login as a user with “Edit Settings” privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. Change the Type property to TODOBAR
4. Press Save

TIP: The Data Source SQL should include a field called BIDATE to allow full TO DO BAR functionality, as ClearView uses this date to decide which day to display the information.

Change to a Chart

Chart gadgets allow you to display information in chart form. Only the information displayed in the gadget can be included on the chart, so charts will render differently for gadgets with different dimensions, or when the specified chart data series is not shown.

1. Login as a user with “Edit Settings” privileges
2. Select the Gadget Properties icon in the toolbar of the gadget
3. Change the Type property to CHART
4. Press Save

TIP: To see x-axis labels, move to Full Screen View.

Creating new gadgets

The data that displays in a gadget is a specialised report, called a Data Source.

If the ClearView Report Designer is installed, you can tailor data sources to meet your specific needs.

Add your custom data sources to available gadgets on the “My” pages. You can also use standard data sources on these pages, i.e. put all your favourite gadgets on one screen.

Design your gadget content

Create custom data sources using the ClearView Report Designer: Setups | ClearView | Report Designer | Report Designer or select the Report Design button on the dashboard (which is faster when the dashboard is already open).

You can start by copying a standard data source then making changes as needed.

Refer to the ClearView Report Designer user guide for more information.

Add your content to a gadget

Once you've designed your custom content, you're ready to add it to your desired gadget.

Every ClearView tab has a "My" Page, i.e. My Accounts, My GL and My Payroll.

Each of these pages has 6 gadgets available for your use. You can also use standard data sources on these pages, i.e. put all your favourite Accounts gadgets on one screen.

To add your custom content to a gadget, you need to edit the properties of the desired gadget.

Define basic settings

- Select the "My" page on the relevant ClearView tab and choose an available gadget
- Select the Gadget Properties icon in the gadget toolbar
- **Type**: select the required format (SEARCH, TODOBAR, TABLE, CHART, etc)
- **Data Source**: select your custom data source.
- **Description**: this is picked up from the Description you've defined in your custom data source
- **Caption**: enter the title you'd like to appear in your gadget's toolbar
- **Custom**: this should now be ticked
- **Header**: tick this box if you'd like the report Heading row to be displayed

Define advanced settings (where needed)

ClearView will automatically use default settings. Adjust the following properties where relevant.

Generic gadget properties

- **Highlight:** if your data source report includes a date type field with the reserved name BIDATE, and the selected date is older than today, then the data will be highlighted in red.
- **Dimension**: the dimensions of a table are defined by the Rows and Columns properties. Specify via the selection box ... . If AUTO, AUTO, ClearView will determine the appropriate dimension based on the gadget size.

- **Sort:** specify the default sort order for the data via the selection box.
- **Filter**: you can apply a filter to the data at run-time, e.g. Active='Y' will just show active records (where defined in the data source).
- **Freeze Columns:** sets the number of columns to be displayed always when scrolling across (using the navigation arrows)
- **Cell Spacing**: sets the space between cells of the gadget data table
- **Cell Padding**: sets the space between the cell walls and the text within the gadget data table
- **Back colour:** sets the background colour using hex colour codes (default is white: #FFFFFF)
- **Border Width**: sets the border width of the gadget data table
- **Refresh**: sets the name of gadgets on the current page which need to be refreshed when the gadget is refreshed.
- **Context Menu**: sets the right-click context menus that will be available within the gadget

Type-specific gadget properties

Properties specific to SEARCH gadgets:

- **Search Context**: sets which database table will be used in the context of a search. Click on the selection box ... to bring up the Search Builder then select the relevant search table in the Context field, and set the Input Size (search box size, e.g 40).

TIP: ClearView assumes that the first column contains the code field in the Context table. E.g. if Context=PROD_MAST, ClearView expects the Product location / code field (called CODE) to appear in the first column. If this is not the case, you must use the Codefield property to specify the code field.

Properties specific to TODOBAR (calendar) gadgets:

- **Calendar View**: leave as AUTO,AUTO or set the number of months via the selection box ...
- **Task View**: leave as AUTO or define the task viewing options (e.g. add This Month and Next Month) via the selection box.
- **Add Bar**: leave blank if you don't want to create records via this gadget, otherwise click the selection box and define the add bar settings. 'Confirm' will prompt before adding the item. 'Open' will open the item for editing after adding. 'Prompt' changes the text which appears in the text box prompting the user.
- **Date Bar**: if selected, the system date will display underneath the calendar.

Properties specific to CHART gadgets:

- **Chart Theme**: select the theme for your chart (e.g. Attaché bar) or leave blank if you prefer to specify View, Rotation
- **Chart View**: select a different appearance for your chart. Note that if you have chosen a Theme, changes made here will not affect your chart's appearance.
- **Chart Rotation**: these settings move the chart 3 dimensionally
- **Chart Data**: sets the data series for the chart. If Auto, defaults to a single data series based on the first numeric data column.
- **Chart Title**: sets the chart header, footer etc.

- **Size**: sets the height and width of the chart.

Gadget Property Reference

You can set default properties when designing a gadget using the Report Designer via the Report Properties | Page Setup | Gadget Properties.

Multiple properties can be set by terminating each property with a semi-colon. For example, the following property string sets the ROWS, COLUMNS and OBJECTID properties.

```
OBJECTID=TABLE;ROWS=AUTO;COLUMNS=AUTO;
```

If you do not set a property, the default value will be used.

Overview

Properties control how the object behaves and is displayed. For example, the dimensions of a table are defined by the ROWS and COLUMNS properties.

Properties can be changed using the Gadget Settings tool, and are saved to the users settings file (SETTINGS.INI). You should avoid editing the settings file directly; however, the properties are described in this document for completeness.

Because of the large quantity of properties available, many individual related properties are grouped together as a “Meta Property” in the Gadget Properties form. To modify an individual property, you can edit the Meta Property string directly, or use the associated Expression Builder.

General Properties

Name	Description	Objects	Meta Property
ADDBAR	Adds a record into the database and refreshes the gadget.	SEARCH, TODOBAR, TABLE, CHART	
BGCOLOR	Sets the background colour.	ALL	
BORDER	Sets the border width of the gadget data table.	ALL	
CAPTION	Sets the text which is displayed in the gadget caption.	ALL	

CELLPADDING	Sets the space between the cell walls and the text within the gadget data table.	ALL	
CELLSPACING	Sets the space between cells of the gadget data table.	ALL	
COLUMNS	Sets the number of columns to display in a gadget.	SEARCH, TODOBAR, TABLE, CHART	Dimensions
CUSTOM	Specifies whether the gadget will use the standard data source or a customised version.	ALL	
DATASOURCE	Sets the report name used to provide the data and the column format of the gadget.	SEARCH, TODOBAR, TABLE, CHART, MESSAGE	
FILTER	Applies a filter at run-time to the data in a gadget.	SEARCH, TODOBAR, TABLE, CHART, MESSAGE	
FREEZECOLUMNS	Sets the number of columns to be displayed always when navigating between columns.	SEARCH, TODOBAR, TABLE	
HEADER	Sets whether sortable data column headings are enabled or disabled.	SEARCH, TODOBAR, TABLE	
HEIGHT	Sets the height in pixels of the image or chart.	IMAGE, CHART	Size
HIGHLIGHT	Sets whether highlighting of data rows is enabled or disabled.	SEARCH, TODOBAR, TABLE	
OBJECTID	Sets the type of object that the gadget data will be displayed in.	ALL	
OBJECTHEIGHT	Gets the height in grid units of the gadget (Read Only).	ALL	
OBJECTWIDTH	Gets the width in grid units of the gadget (Read Only).	ALL	
PAGEBAR	Sets the format of the page bar.	ALL	
ROWS	Sets the number of rows to display in a gadget.	SEARCH, TODOBAR, TABLE, CHART	Dimensions
SORT	Applies a sort at run-time to the data in a gadget.	SEARCH, TODOBAR, TABLE, CHART, MESSAGE	
REFRESH	Sets the name of gadgets on the current page which need to be refreshed when the gadget is refreshed.	ALL	
TARGET	Sets the location of the window where a hyperlink target will be displayed.	LINK	

TOTAL	Sets whether totals are to be shown or hidden for the gadget. Defaults to “NO”	SEARCH, TODOBAR, TABLE, CHART, MESSAGE	Totals
WIDTH	Sets the width in pixels of the image or chart.	IMAGE, CHART	Size

Chart Properties

Name	Description	Objects	Meta Property
CHARTTHEME	Sets the overall theme of a chart. Users can then customise the chart using other properties.	CHART	
CHARTTYPE	Sets the type of chart to display (eg. line, bar etc). Default is “COLUMN”. Select from COLUMN, BAR, AREA, LINE, PIE or DOUGHNUT.	CHART	Chart View
CHARTSUBTYPE	Sets the sub-type of chart to display (eg. plain, stacked etc). Default is “PLAIN”. Select from PLAIN, STACKED, STACKED % or EXPLODED.	CHART	Chart View
CHARTXAXIS	Sets the X-Axis label for the chart. Can be a column number or name. Defaults to first non-numeric data column.	CHART	
CHARTDATA1…6	Sets the data series for the chart. Can be column numbers or headings. If blank or “Auto”, defaults to a single data series in first numeric data column.	CHART	Chart Data
CHARTDATALABELSFONT	Sets the font style, size and colour for data labels. Default is “Verdana,7,Regular,White”	CHART	
CHARTFOOTER	Sets the description of the chart footer. If “AUTO” then will use the column heading in the X-Axis label column.	CHART	Chart Title
CHARTHEADER	Sets the description of the chart header. If “AUTO” then will use the column heading in the X-Axis label column.	CHART	Chart Title

CHARTLEGENDPOS	Reserved for future use. Sets the position of the legend. Default is to Show Legend in Top Left position.	CHART	Chart Title
CHARTMARGINMODE	Sets the margin mode of the chart to NONE, FIT or STRETCH. Default is "None"	CHART	
CHARTMARGINTOP CHARTMARGINLEFT CHARTMARGINBOTTOM CHARTMARGINRIGHT	Sets the Top, Left, Bottom and Right margins of the chart expressed as a percentage. Default is "10"	CHART	
CHARTZOOM	Sets the Zoom chart expressed as a percentage. Default is "100"	CHART	Chart Layout

Calendar Properties

Name	Description	Objects	Meta Property
DATEBAR	Sets the format of the date bar.	TODOBAR	Calendar View
DEFAULTVIEW	Sets the default view of the gadget.	TODOBAR	Calendar View
MONTHBAR	Sets whether to show or hide the calendar.	TODOBAR	Calendar View
MONTHS	Sets how many months are shown on a calendar.	TODOBAR	Calendar View
NAVBAR	Sets the format of the navigation bar.	TODOBAR	

Search Properties

Name	Description	Objects	Meta Property
CODEFIELD	Sets the name of the search key field in the gadget data source.	SEARCH	Search Type
CONTEXT	Sets which database table will be used in the context of a search.	SEARCH	Search Type
INPUTSIZE	Sets the width in characters of the search text box.	SEARCH	
RESULTFIELD	Sets the name of the search result field in the gadget data source.	SEARCH	Search Type

Reference

ADDBAR

Adds a record into the database and refreshes the gadget.

Syntax

```
ADDBAR= <TYPE:=<value>, [CONFIRM:=<value>, OPEN:=<value>, PROMPT:=<value>,
param_1:=value_1,…>;
```

TYPE refers to a solution builder object name. Refer to the Solution Builder Object Reference (on-line help) for more information. Not all objects maybe supported.

CONFIRM will prompt before adding the item.

OPEN will open the item for editing after adding.

PROMPT changes the text which appears in the text box prompting the user.

PARAM are optional and allow default field values to be set when the object is added. Refer to the Solution Builder Object Reference for more information.

Example

```
ADDBAR= TYPE:=CONTACT, CONFIRM:=TRUE, OPEN:=TRUE, PROMPT:=Type to add a new task;
```

Remarks

If you do not have the appropriate module installed, the Add Bar is disabled by default.

Applies To

TODOBAR, TABLE, SEARCH objects.

BGCOLOR

Sets the background colour.

Syntax

```
BGCOLOR=color;
```

Color can be a named color or a hex value in #RRGGBB where RR is red, GG is green and BB is blue. Default is #FFFFFF (white).

Example

```
BGCOLOR=#FFFFFF;
```

BORDER

Sets the border width of the gadget data table.

Syntax

```
BORDER=<number>;
```

Example

```
BORDER=0;
```

Remarks

A value of zero will hide the border. The default is 0.

Applies To

All objects.

CAPTION

Sets the text which is displayed in the gadget caption.

Used by the LINK and TEXT object to specify text to be displayed by the object.

Syntax

```
CAPTION=<expression>;
```

Remarks

Expression can be a text value or an expression which can be evaluated at run-time to allow dynamic captioning in a gadget.

Example

```
CAPTION=My List;
CAPTION=”Tasks for “ & Date();
```

Applies To

LINK, TEXT objects.

CELLPADDING

Sets the space between the cell walls and the text within the gadget data table.

Syntax

```
CELLPADDING=<number>;
```

Example

```
CELLPADDING=2;
```

Remarks

Default is 2.

Applies To

All objects.

CELLSPACING

Sets the space between cells of the gadget data table.

Syntax

```
CELLSPACING=<number>;
```

Example

```
CELLSPACING =2;
```

Remarks

Default is 0.

Applies To

All objects.

CHARTTYPE

This will set the type of chart to display (eg. line, bar etc).

Syntax

```
CHARTTYPE=[AUTO | COLUMN | DOUGHNUT | PIE | AREA];
```

Example

```
CHARTTYPE=COLUMN;
```

Default

```
COLUMN
```

Applies To

CHART object.

CHARTSUBTYPE

This will set the sub-type of chart.

Syntax

```
CHARTXAXIS=sub_type;
```

Default

```
PLAIN
```

Remarks

Valid values depend on the CHARTTYPE property.

Applies To

CHART object.

CHARTXAXIS

This specifies which column in the gadget is used for the X-Axis labels.

Syntax

```
CHARTXAXIS=column;
```

Example

```
CHARTXAXIS=2;
```

Default

```
1
```

Applies To

CHART object.

CHARTFOOTER

This is the text that is displayed in the chart footer.

Syntax

```
CHARTFOOTER=text|XML;
```

Example

```
CHARTFOOTER=Customer Sales;
```

Remarks

You can apply limited formatting to text using XML tags.

Applies To

CHART object.

CHARTSUBFOOTER

This is the text that is displayed in the chart sub-footer.

Syntax

```
CHARTSUBFOOTER=text|XML;
```

Example

```
CHARTSUBFOOTER=Shows sales for last 12 months;
```

Remarks

You can apply limited formatting to text using XML tags.

Applies To

CHART object.

CHARTHEADER

This is the text that is displayed in the chart header.

Syntax

```
CHARTHEADER=text|XML;
```

Example

```
CHARTHEADER=Customer Sales;
```

Remarks

You can apply limited formatting to text using XML tags.

Applies To

CHART object.

CHARTSUBHEADER

This is the text that is displayed in the chart sub-header.

Syntax

```
CHARTSUBHEADER=text|XML;
```

Example

```
CHARTSUBHEADER=Shows sales for last 12 months;
```

Remarks

You can apply limited formatting to text using XML tags.

Applies To

CHART object.

CHARTMARGINMODE

This controls how the chart will display within the margins.

Syntax

```
CHARTMARGINMODE=NONE|FIT|STRETCH;
```

Default

```
FIT
```

Example

```
CHARTMARGINMODE=STRETCH;
```

Applies To

CHART object.

CHARTLEGENDPOS

This controls where the chart legend will be displayed.

Syntax

```
CHARTLEGENDPOS=position|x,y;
```

Default

```
TOPRIGHT
```

Example

```
CHARTLEGENDPOS=TOP;
```

Remarks

Valid position values include TOPLEFT, TOPRIGHT, TOP, CENTRELEFT, CENTRERIGHT, BOTTOMLEFT, BOTTOM and BOTTOMRIGHT. You can also control the position using x and y co-ordinates as a percentage.

Applies To

CHART object.

CHARTDEPTH

This controls the depth of a 3D chart.

Applies To

CHART object.

CHARTROTATEH

This controls the horizontal rotation of a 3D chart.

Applies To

CHART object.

CHARTROTATEV

This controls the vertical rotation of a 3D chart.

Applies To

CHART object.

CHARTTHEME

This sets the chart type and default values based on a predefined theme.

Remarks

Valid themes are ATTACHE LINE, ATTACHE BAR, ATTACHE COLUMN and ATTACHE PIE

Applies To

CHART object.

CHARTDATALABELSFONT

This is used to set the font for the data labels on a chart.

Syntax

```
CHARTDATALABELSFONT=[Font],[Size],[Weight],[Color];
```

Example

```
CHARTDATALABELSFONT=Verdana,7,Regular,White;
```

Default

```
Verdana,7,Regular,White
```

Remarks

Font colour can be expressed as an RGB or name of a colour. For example, “White” can also be represented by “255,255,255”. If labels are not shown on the chart, you can use this property to switch them on.

Applies To

CHART object.

CODEFIELD

Sets the name of the search key field in the gadget data source.

If not supplied, then it will be assumed to be the first column.

Syntax

```
CODEFIELD=<field name>;
```

Example

```
CODEFIELD=PRODUCT;
```

Remarks

If not specified, ViewPoint will use the field displayed in the first column.

Applies To

SEARCH object.

COLUMNS

Sets the number of columns to display in a gadget.

Syntax

```
COLUMNS=AUTO | <number>;
```

Example

```
COLUMNS =2;
```

Remarks

Default is AUTO. The number of columns will be automatically determined by the gadget width.

Applies To

SEARCH, TODOBAR, TABLE, CHART objects.

CUSTOM

Specifies whether the gadget will use the standard data source or a customised version.

Syntax

```
CUSTOM=[AUTO] | YES | NO;
```

Example

```
CUSTOM=YES;
```

Remarks

Default is NO.

Applies To

All objects.

CONTEXT

Sets which database table will be used in the context of a search.

Syntax

```
CONTEXT=<context information>;
```

Example

```
CONTEXT=CUST_MAST; CODEFIELD=CUSTCODE;
```

Remarks

Specifies the data table or query to be used for the search. For example, CUST_MAST (customers), PROD_MAST (products), JOBMAST (jobs), SUPP_MAST (suppliers).

Applies To

SEARCH object.

DATEBAR

Sets the format of the date bar.

Syntax

```
DATEBAR= YES | NO | AUTO;
```

Example

```
DATEBAR=YES;
```

Remarks

The Date Bar displays the current day and date. It is disabled by default.

Applies To

TODOBAR object.

DATASOURCE

This will set the report name used to provide the data and the column format of the gadget.

Syntax

```
DATASOURCE=<report name>;
```

Example

```
DATASOURCE=BI ENQUIRY TODO;
```

Applies To

SEARCH, TODOBAR, TABLE, CHART, MESSAGE objects.

DEFAULTVIEW

Sets the default view of the gadget.

Syntax

```
DEFAULTVIEW=<view name>;
```

Example

```
DEFAULTVIEW=THIS WEEK;
```

Remarks

DEFAULTVIEW applies to gadgets which allow you to switch between different views using a navigation bar, such as a TODOBAR object. See also OBJECTID and NAVBAR properties.

Applies To

TODOBAR object.

FILTER

Applies a filter at run-time to the data in a gadget.

Syntax

```
FILTER=<filter expression>;
```

Example

```
FILTER=CMCODE='ABEL';
```

Remarks

FILTER allows you to use the same DATSOURCE in multiple objects and display different data using the FILTER.

You can apply the same run-time filter to other gadgets using the PLGETFILTER function and using the REFRESH property to force a refresh. For example, a run-time filter applied to GAD01 using the shortcut menu, can be applied to GAD02 by using the PLGETFILTER function in the SQL of the GAD02 data source.

Applies To

SEARCH, TODOBAR, TABLE, CHART, MESSAGE objects.

FREEZECOLUMNS

Sets the number of columns to be displayed always when navigating between columns.

The PAGEBAR (horizontal arrow tools to display columns) tool is used to display columns which cannot fit in a gadget. FREEZECOLUMNS can be used to always display the left most columns during navigation.

Syntax

```
FREEZECOLUMNS=<value>;
```

Example

```
FREEZECOLUMNS=3;
```

Remarks

Default is 2 for gadgets with 3 or more columns, and is 1 for gadget with 2 columns.

Applies To

SEARCH, TODOBAR, TABLE objects.

HEADER

Sets whether column headings are displayed or not in the gadget.

Syntax

```
HEADER=AUTO | YES | NO;
```

Example

```
HEADER=YES;
```

Remarks

When a heading row is displayed, smart column sorting is automatically enabled for displayed lists. Click on a column heading to toggle between sorting in ascending and descending order.

You cannot sort columns of a TODOBAR object, as these are sorted automatically.

Applies To

SEARCH, TODOBAR, TABLE objects.

HEIGHT

Sets the height of the image or chart.

Syntax

```
HEIGHT=<pixels>;
```

Applies To

IMAGE object.

Example

```
HEIGHT=200;
```

Remarks

Default is AUTO.

Applies To

IMAGE, CHART objects.

HIGHLIGHT

Sets whether highlighting of data rows is enabled or disabled.

Syntax

```
HIGHLIGHT=AUTO | YES | NO;
```

Example

```
HIGHLIGHT=NO;
```

Remarks

Applies to objects with a date type field with the reserved name BIDATE. If the selected date is older than today, then the data will be highlighted in another colour (usually red). This attribute is automatically enabled for TABLE and TODOBAR objects

Applies To

SEARCH, TODOBAR, TABLE objects.

INPUTSIZE

Sets the width in characters of the search text box.

Syntax

```
INPUTSIZE=<number>;.
```

Example

```
INPUTSIZE=40;
```

Remarks

Defaults to 20.

Applies To

SEARCH object.

MONTHBAR

Sets whether to show or hide the calendar.

Syntax

```
MONTHBAR=AUTO | YES | NO;
```

Example

```
MONTHBAR=NO;
```

Remarks

Applies To

TODOBAR object.

MONTHS

Sets how many months are shown on a calendar.

Syntax

```
MONTHS= AUTO | <number>;
```

Example

```
MONTHS=2;
```

Remarks

When AUTO is specified the number of months is calculated based on the object size.

Applies To

TODOBAR object.

NAVBAR

Sets the format of the navigation bar.

The navigation bar has hyperlinks which allows the user to filter the To-Do list.

Syntax

```
NAVBAR=YES | NO | AUTO | <item list>;
```

Remarks

It is enabled by default and displays links for TODAY, NEXT WEEK, THIS WEEK, NO DATE. You can use the DEFAULTVIEW property to select which view will be displayed initially.

You can optionally show some or all of the navigation links by specifically naming them in a comma separated Item List.

Item List is a comma separated list which can include TODAY, NEXT WEEK, THIS WEEK, NO DATE, NEXT MONTH and THIS MONTH.

Example

```
NAVBAR= TODAY, NEXT MONTH, THIS MONTH, NO DATE;
```

Applies To

TODOBAR object.

OBJECTID

Sets the type of object that the gadget data will be displayed in.

Syntax

```
OBJECTID=<object type>;
```

Example

```
OBJECTID=TODOBAR;
```

Remarks

OBJECTID can be one of the following; TABLE; TODOBAR; SEARCH; CHART; MESSAGE; LINK; TEXT; IMAGE; MENU; See also Object Reference.

Applies To

All objects.

OBJECTHEIGHT

Gets the height in grid units of the gadget (Read Only).

Remarks

This property is read only. A grid unit occupies 1/16 of the dashboard display. A standard template is based on a 4 column x 4 row grid.

Applies To

All objects.

OBJECTWIDTH

Gets the width in grid units of the gadget (Read Only).

Remarks

This property is read only. A grid unit occupies 1/16 of the dashboard display. A standard template is based on a 4 column x 4 row grid.

Applies To

All objects.

PAGEBAR

Sets the format of the page bar.

The Page Bar displays hyperlinks which allow the user to page between rows and columns. It is enabled by default and displays all links. You can optionally show some or the entire row and column navigation links.

Syntax

```
PAGEBAR=[AUTO | 1 | 0] | [ROW, COL];
```

AUTO=Hide or Display Automatically. 1=Always Display, 0=Always Hide, ROWS=Display Rows Always. COL=Display Columns Always. The default value is AUTO.

Example

```
PAGEBAR=AUTO;
```

Remarks

Next Page and Previous Page selectors allow the user to display data rows where they cannot fit on a single page.

Next Column(s) and Previous Column(s) allow the user to display data columns where they cannot fit on a single page. By default, the first two columns are frozen and are always displayed while navigating columns.

When AUTO mode, the column indicators will only display if there are more columns than can be displayed at once.

Applies To

All objects.

ROWS

Sets the number of rows to display in a gadget.

Syntax

```
ROWS=AUTO | <number>;
```

Example

```
ROWS=5;
```

Remarks

Default is AUTO. The number of rows will be automatically determined by the gadget height.

Applies To

SEARCH, TODOBAR, TABLE, CHART objects.

SORT

Applies a sort at run-time to the data in a gadget.

SORT allows you to use the same DATSOURCE in multiple objects and display it differently. If not specified, the object will sort the data automatically.

Syntax

```
SORT=[field [ASC|DESC]];
```

Example

```
SORT=CMSREP ASC, CMYSALES DESC;
```

Remarks

SORT is ignored if the DATASOURCE is already pre-sorted. That is if it contains the ORDER BY clause.

Applies To

SEARCH, TODOBAR, TABLE, CHART, MESSAGE objects.

REFRESH

Sets the name of gadgets on the current page which need to be refreshed when the gadget is refreshed.

Syntax

```
REFRESH=[gadgetname];
```

Example

```
REFRESH=GAD01,TABLE01;
```

Remarks

GADGETNAME can refer to a single gadget or a comma separated list, if multiple gadgets are to be refreshed.

REFRESH is useful when data in other gadgets are affected by changes to a gadget. For example, a run-time filter applied to GAD01 using the shortcut menu, can be applied to GAD02 by using the PLGETFILTER function in the SQL of the GAD02 data source.

Applies To

All objects.

RESULTFIELD

Sets the name of the search result field in the gadget data source.

Used by the SEARCH object to identify the name of the field in DATASOURCE where the search results should be published. If a match is found, the object compiles a results string and will append it to the RESULTFIELD to allow a rich search experience.

Syntax

```
RESULTFIELD=[fieldname];
```

Example

```
RESULTFIELD=PMDESC;
```

Applies To

SEARCH object.

TARGET

Sets the location of the window where a hyperlink target will be displayed.

It is by the LINK object to specify whether the link should be opened in the same window.

Syntax

```
TARGET =[_BLANK | _SELF];
```

Applies To

LINK object.

Example

```
TARGET=BLANK;
```

TOTAL

Sets whether totals are to be shown or hidden for the gadget.

Syntax

```
TOTAL =[NO | YES | <column_list>];
```

Applies To

SEARCH, TODOBAR, TABLE, CHART, MESSAGE object.

Example

```
TOTAL=YES;
TOTAL=1,5;
```

Remarks

You can specify which columns to total by specifically their index using a comma separated list (COLUMN_LIST), otherwise ViewPoint will automatically total numeric columns. To ensure columns are recognised as numeric, you should select a numeric Format string (eg. “Fixed”,”0.00” etc) when designing the data source using the Reports Designer.

WIDTH

Sets the width in pixels of the image or chart.

Syntax

```
WIDTH=<pixels>;
```

Applies To

IMAGE object.

Example

```
WIDTH=400;
```

Remarks

Default is AUTO.

Applies To

IMAGE, CHART objects.