

Common Terminology

- Understanding the **Common Terminology** used in DreamApps is particularly useful and efficient from day-to-day usage of the system.

Form

Entry screen that allows you to enter data.

Sample Form image

The screenshot shows the 'Quotations' form in the DreamApps system. The interface includes a top navigation bar with 'Home', 'Order Processing', and 'Order Entry'. Below this is a 'Quotations' header with a search bar and a list of tabs: 'Quotation', 'Jobs', 'Details', 'Images', 'Signature', 'Service Package', 'Tools', 'Milestones', 'Inventory', 'Work', 'Customer', 'Delivery', 'Docs', 'Open', 'Approved', 'On Hold', 'Confirmed', 'Revised', 'Failed', and 'PRs'. The main form area is divided into several sections. On the left, there are fields for 'Quotation Number' (with a search icon), 'Deadline' (set to 60 days), 'Quotation Status' (a dropdown), 'Project' (a dropdown), 'Quotation Deadline' (set to [Unknown]), 'Partial Delivery' (checked), 'Total Amount' (0.00), 'Quote By' (radio buttons for '1-Selling Unit' and '2-Weight'), 'Team' (a dropdown), 'Location' (a dropdown), 'Order' (a dropdown), 'Delivery' (a dropdown), and 'Source' (a dropdown). On the right, there are fields for 'Date' (26/09/2016), 'Currency' (PHP), 'Customer Number' (a search icon), 'Exchange Rate' (1.0000000000), 'Division' (a dropdown), 'Section' (a dropdown), 'Customer Enquiry' (a dropdown), 'Customer Enquiry Date' (set to [Unknown]), 'Validity' (set to [Unknown]), 'Invoicing Rule' (5-Direct from Order), 'Header Message' (a text area), 'Footer Message' (a text area), 'Notes' (a text area), 'Team Member' (a dropdown), 'Manager' (a dropdown), 'Start Date' (set to [Unknown]), 'Quotation Flag' (a dropdown), 'Print GST?' (checked), 'International Commercial Terms' (a dropdown), 'End User/Vessel' (a dropdown), and 'Location of Installation' (a dropdown). The form is styled with a light blue background and various icons for editing and deleting records.

List

Usually on the same page with form. A listing of database on the screen.

Sample List image

| None 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All | | | | | | | |
|--|-----------------|---|------------|------------------|-----------|---------------|------------------|
| < < | | Quotations | | | | 10 > > | |
| Quotation Number # | Customer Number | Name | Date | Customer Enquiry | xdeadline | Salesperson | Quotation Status |
| QT--000036 | CUS-000012 | 24/7 Convenience store | 20/09/2016 | | 60 | Cecille Abapo | Confirmed |
| QT--000035 | CUS-000012 | 24/7 Convenience store | 28/08/2016 | | 60 | | Open |
| QT--000034 | CUS-000007 | Elle Restaurant | 19/08/2016 | | 60 | | Confirmed |
| QT--000033 | CUS-000012 | 24/7 Convenience store | 25/07/2016 | | 60 | | Confirmed |
| QT--000032 | CUS-000012 | 24/7 Convenience store | 25/07/2016 | | 60 | | Expired |
| QT--000031 | CUS-000006 | AI AI FURNITURE MANUFACTURING CORPORATION | 24/07/2016 | | 60 | Cecille Abapo | Confirmed |
| QT--000030 | CUS-000006 | AI AI FURNITURE MANUFACTURING CORPORATION | 23/07/2016 | | 60 | | Confirmed |
| QT--000029 | CUS-000006 | AI AI FURNITURE MANUFACTURING CORPORATION | 19/07/2016 | | 60 | Cecille Abapo | Confirmed |
| QT--000027 | CUS-000006 | AI AI FURNITURE MANUFACTURING CORPORATION | 18/07/2016 | | 60 | | Confirmed |
| QT--000026 | CUS-000012 | 24/7 Convenience store | 18/07/2016 | | 60 | | Confirmed |
| Refresh + | | | | | | | |

| | |
|----------------|--|
| Buttons | The command button control is used to begin, interrupt, or end a process. When clicked, it invokes a command that has been written into its Click event procedure. |
|----------------|--|

Sample Button Image

| Quotation | Jobs | Details | Images | Signature | Service Package | Tools | Milestones | Inventory | Work | Customer | Delivery | Docs | Open | Approved | On Hold | Confirmed |
|------------|---|---------|--------|-----------|-----------------|-------|------------|-----------|------|----------|----------|------|------|----------|---------|-----------|
| Row | Row Number - Starts at 10, follows by 20,30,,40...In case you want to add in a new row, just type in a Row Number, the details and it will be inserted in between two Rows. | | | | | | | | | | | | | | | |

Exmample: If you type in Row Number 24, it will be inserted between 20 and 30.

| | |
|----------------------|--|
| Base Currency | The Base Currency you use to keep your accounts. |
| Base Amount | The amount in Base Currency. |

| | |
|-----------------------|--|
| Prime Currency | The transacted currency, that is, the currency you use to transact with your costumers or suppliers. You may keep your accounts in Peso (base) and you can transact in any currencies (prime), like Peso, SGD, US Dollar, etc. |
| Prime Amount | The amount in prime currency |

Illustration: The Prime Amount x The Exchange Rate = The base amount, that is

$$\text{USD}10,000 \times 1.750 = \text{SGD}17,500.00$$

and if the prime amount is the same as base amount, then

$$\text{SGD}10,000 \times 1.000 = \text{SGD}10,000.00$$

| | |
|---------------------------|--|
| Status | Both the transaction header and details show the current status of the transaction. This information is very important and the user should have a habit of knowing the exact status of the transaction before they proceed to the next step. For example, in a Quotation header, there are several statuses: Open, Confirmed, RFQ to Supplier, Revised and Failed. In a Quotation details, there are also several statuses too: Open, Verified and Scheduled. You will get to know more, when we start implementing OP, PO and SO modules. |
| Module | Classifications of software functions. |
| Header and Details | Most DreamApps transaction consists of header and detail. For example, a Quotation header will have transaction code + number, customer, etc and a Quotation detail will have item, price, quantity, etc. |
| Default | Original setting by the system or by the company. |
| Menu | A selection box to choose the module or functions. |
| Master Maintenance | Database of static information. |
| Transaction Code | Classifications of transactions. |
| Group | Very important field. Used for grouping of Items, Customers and Supplier for GL Interface and Analysis. |
| Interface Table | Certain matching values for posting to General Ledger. |
| On-line Update | source entries updating value automatically. |
| Batch Posting | Source entries updating target value after posting. |
| Transaction Number | Transaction code + Running number |
| Document Ref/No | User defined reference / number during transaction entry. |
| Opening Balance | Brought forward values from previous year / month. |

Exercise: Buttons

Please practice the following buttons used almost by all modules.

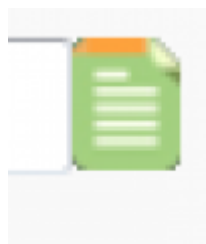
- Click on **Clear** button, the screen becomes a blank page.
- Click on **Top** button, the screen will show you the last number. In this instance, it will show you the last number for transaction code: QT-. Alternatively, you may also select the transaction code you want to work on, enter the number and click on **Show** button, the system will show you the specified transaction.
- Select the transaction code you want to work on. Enter all the necessary information on the screen, click on **Add** button, you will see a new number for that transaction code is created.

- If you need to make correction, just go ahead and do the changes, and after you have completed the changes, click on **Update** button to save the changes.
- You may click on **Delete** button to delete a master file or a transaction, please take note that you are unable to delete any master file or a transaction that is still having data in the detail or sub screen. You have to first delete the record in the detail or sub screen first, then delete the header record.
 - You will not be able to delete the master file like Customer, Supplier, Chart of Accounts, Item if there is transaction for that master file.
 - However, you are able to delete a code file like Item Group, Division, Section, Project, Market, Region, Territory, etc...even if there is transaction for that file.
- Sometimes, you just want to **Undo** the status of a transaction instead of deleting it entirely. If so, you may click on **Undo** button and see the status being undone, and the transaction will revert back to the previous position. A good example will be after a Customer Order is being scheduled for delivery and Inventory Status already being allocated to customer. At this point of time, by clicking on the button **Undo** will bring both the status for the Customer Order and stock to the previous position.
- Since the transaction entry screen always shows you the most recent transaction first, if you want to move to the next transaction, you should click on **Next** button and if you want to move to the previous transaction, you should click on **Previous** button. This is not applicable to all master maintenance files like item, codes, customer, supplier and etc, which will always show in ascending order.
- You can attach any form of documents by pointing and clicking on **Docs** button and add in the documents you want to attach. Please refer to the Chapter on System Administration - Docs Folder for the location of Docs Folder.
- If you want to create a revision of a transaction, just click on **Revise**, which can be found on the header screen.
- You may click on **Details** button, and that will lead you to the detail screen.
- You may click on **Return** when you want to return from detail screen to the header screen.
- Check **Activate** to activate the codes that are created by you.

Other Buttons

- When you see this **Scrolling list** next to a field, you can search for the content by the description and by the code.

Note: Scrolling List sort the item by item code.



- You can Key in partial item description and click on **Verify Item** in the OP and PO modules, the system will show you the list of item that contain the partial item description.



Click on this button for **Calendar**

From:

<http://wiki.dreamapps.com/wiki/> - **DreamApps Wiki**

Permanent link:

<http://wiki.dreamapps.com/wiki/doku.php?id=cecille:ct&rev=1475033411>

Last update: **2016/09/28 03:30**

