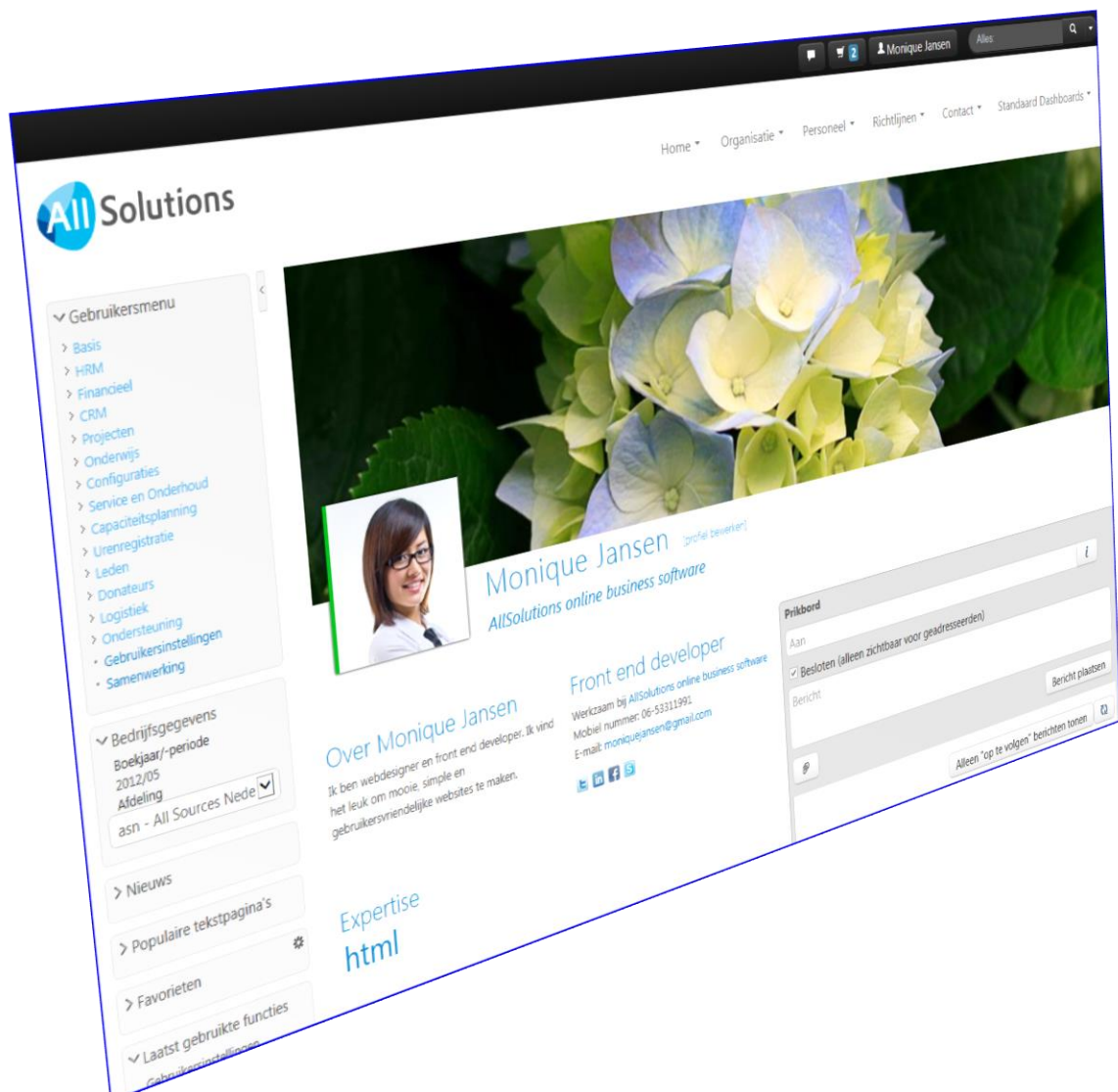


Knowing your way around AllSolutions12

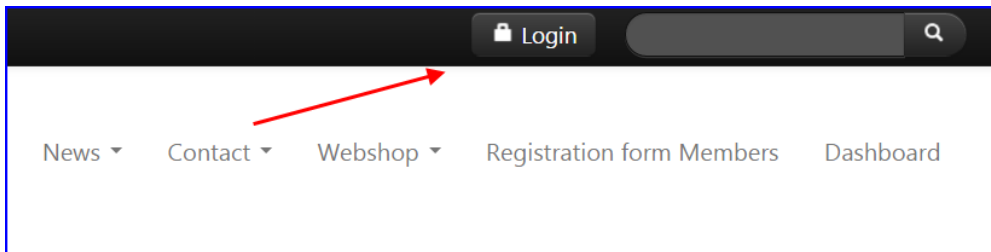


Contents

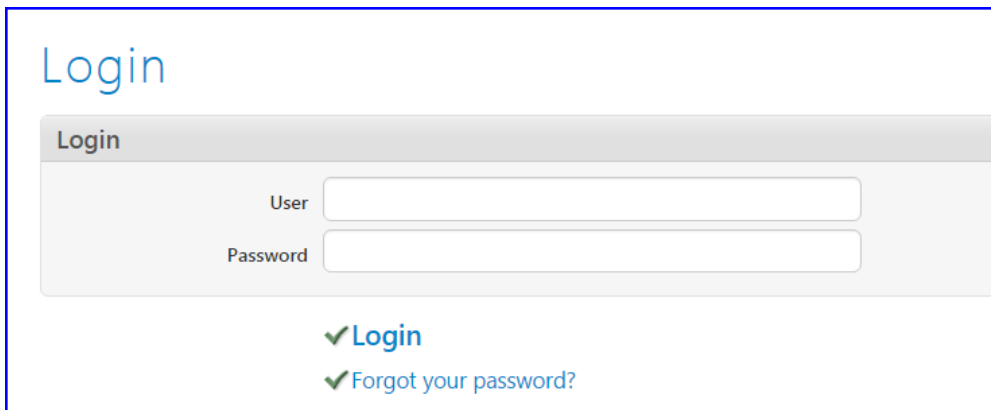
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1. Logging in

Go to the web address of AllSolutions for your company. If the home page does not show the login fields, click on **Login** at the top right-hand corner of the screen to access the login screen.



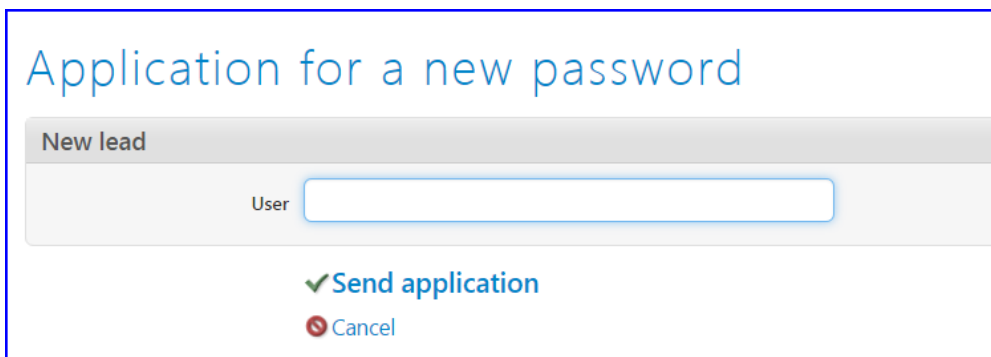
Enter your user name and password and click on **Login**. The user name is your unique login code. (AllSolutions also offers the option to log in with your e-mail address, provided that this is allowed in your user account or profile.)



When you log in for the first time, three fields appear in which you have to change your password into a personal one (*Old or temporary password, New password and Confirm new password*).

Forgotten your password?

Click at the bottom or on the right-hand side of the screen on *Forgot your password?* You can apply for a new password in the new screen that appears:

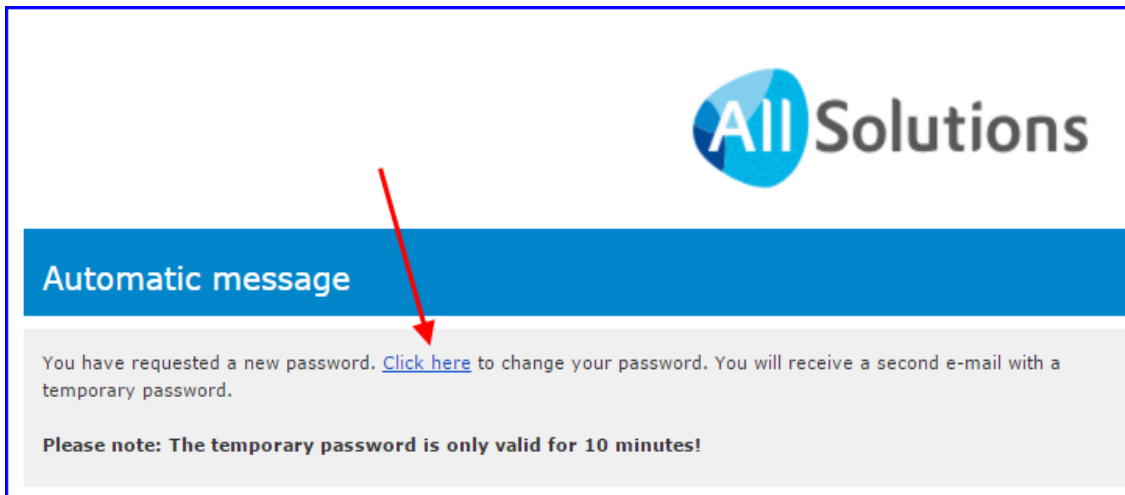


Enter your user name and click on **Send application**. At the top of the screen you see a message that reads 'Your request for a new password has been sent.'

For security reasons you will receive **two separate e-mail messages**: one with a link to the login screen (=Application for a new password), and one with your *new password*.

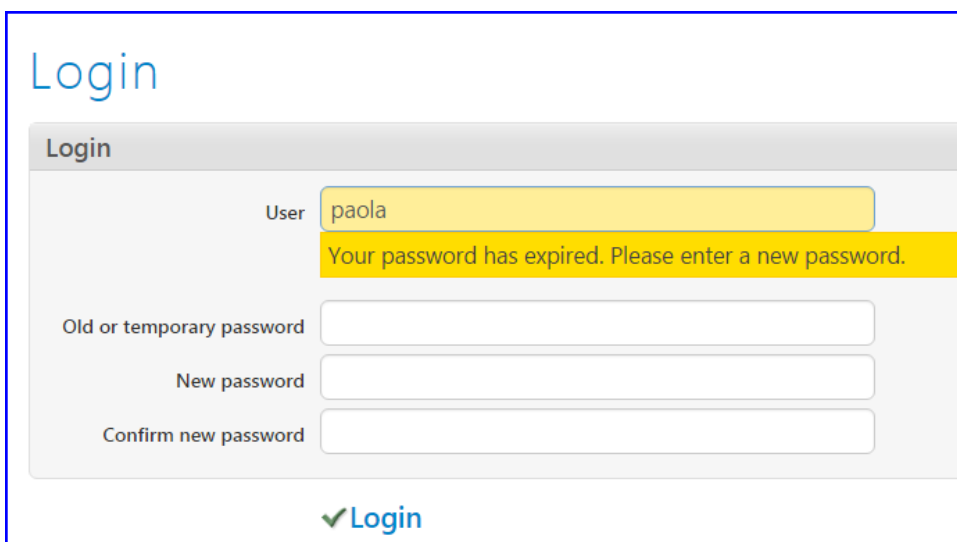
Click the link in the first message to receive the second e-mail with the temporary password.

Please note: The temporary password is only valid for 10 minutes!



When you click on the link you will read the message that 'Your password was sent.'

Type your user name and the password from the second e-mail and click on **Login**. Three extra fields will now appear in the login screen in which you have to create your own new password (*Old or temporary password*, *New password* and *Confirm new password*).

The image shows a screenshot of the 'Login' page. The title 'Login' is at the top left. Below it is a form with a 'User' field containing 'paola'. A yellow message box is overlaid on the form, stating: 'Your password has expired. Please enter a new password.' Below this message are three input fields: 'Old or temporary password', 'New password', and 'Confirm new password'. At the bottom of the form is a green checkmark icon followed by the text 'Login'.

Change your password

It is also possible to change your password in AllSolutions. This is explained in chapter 6.

2. Screen layout

The AllSolutions screen is divided in three sections:

1. The top section with navigation elements such as the top menu and the metabar (at the top)
2. The services section (on the left)
3. The work section

Zoeknaam	Relatie-nummer	Adres correspondentie	Postcode correspondentie	Plaats correspondentie	Telefoon	Relatie-type	Nummer Kamer van Koophandel
<input type="checkbox"/> A & O ADVIES BV	00045782	Steenwijkerdwarweg 9 b	8479 HH	OLDETRIJNE	0348-430110	Organisatie	
<input type="checkbox"/> A N P	00045544	Van Heemstraweg 2	9649 JP	MUNTENDAM	0348-430110	Organisatie	
<input type="checkbox"/> A-Z REKLAME	00090482	Waterpas 90	3044 EN	ROTTERDAM		Organisatie	
<input type="checkbox"/> A2	00018884	Vissersdijk 41	2973 XA	MOLENAARSGRAAF	0348-430110	Persoon	
<input type="checkbox"/> aa	00009745	De Banken 18	5437 AX	BEERS NB	0348-430110	Persoon	
<input checked="" type="checkbox"/> AA	00021485	Meyerweg 26	1678 GA	OOSTWOUD	0348-430110	Persoon	
<input type="checkbox"/> AA	00024376	Van Hogendorpweg 151	6291 GW	VAALS	0348-430110	Persoon	
<input type="checkbox"/> AA	00100344	Middelweg 23	5146 AB	WAALWIJK	0348-430110	Persoon	
<input type="checkbox"/> AA GEBR.	00046093	Postbus 2001	8600 AJ	SNEEK		Organisatie	
<input type="checkbox"/> AA RELATIEMAN.	00081230	Cereslaan 11	3241 MB	MIDDELHARNIS	0348-430110	Organisatie	
<input type="checkbox"/> AAFJES	00025769	Postbus 670	6654 BL	AFFERDEN GLD	0348-430110	Persoon	
<input type="checkbox"/> AAJEE	00101425	IJsvogel 1	6987 AD	GIESBEEK	0348-430110	Organisatie	
<input type="checkbox"/> AALBERS	00008154	Prinses Margrietlaan 5	5298 AK	LIEMPDE	0348-430110	Persoon	
<input type="checkbox"/> AALBERS	00025391	Stinsewei 2	7134 PX	VRAGENDER		Persoon	
<input type="checkbox"/> AALBERS	00029733	Noorderhout 12	4194 SL	METEREN	0348-430110	Persoon	

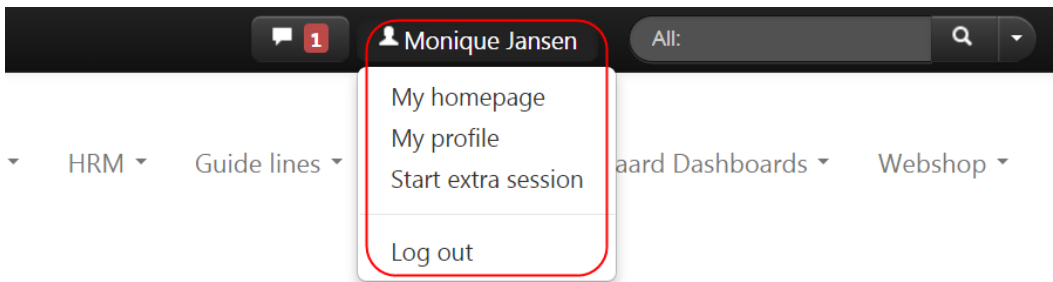
2.1. The top section of the screen

2.1.1. The metabar

A number of functions are centralized in the so-called 'metabar' at the top of the screen.

HRM ▾ Guide lines ▾ Contact ▾ Standaard Dashboards ▾ Webshop ▾

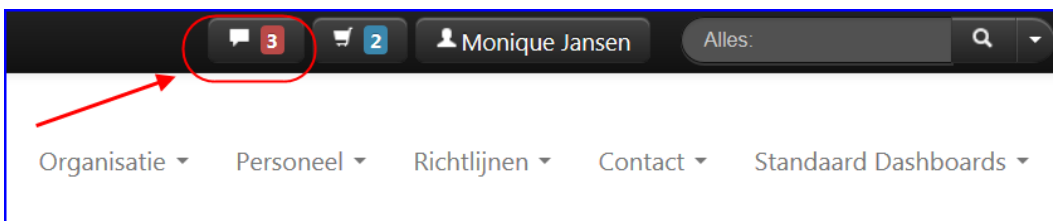
A click on the name of the logged-in user unfolds a small menu to navigate to your personal homepage or your own profile page. In addition, the 'Log out' option is located here.



- **Personal homepage:** With this link you can return directly from all screens to your personal homepage. This is the page that is shown in the work section as soon you have logged in as a user. If you click on the logo in the top left-hand corner of the screen, you also return to your personal homepage. For more information, see chapter 4.
- **Profile page:** With this link you can navigate directly from all screens to your personal profile page. In AllSolutions, each user has its own profile page. For more information, see chapter 6.
- **Start extra session:** In AllSolutions you can work with multiple sessions at the same time, as long as you are logged in on the same workstation/device. This action lets you open an extra session more quickly, so that you are instantly logged into the system.
- **Log out:** This action lets you log out and shut down your work sessions properly. (Not applicable when using single sign-on.)

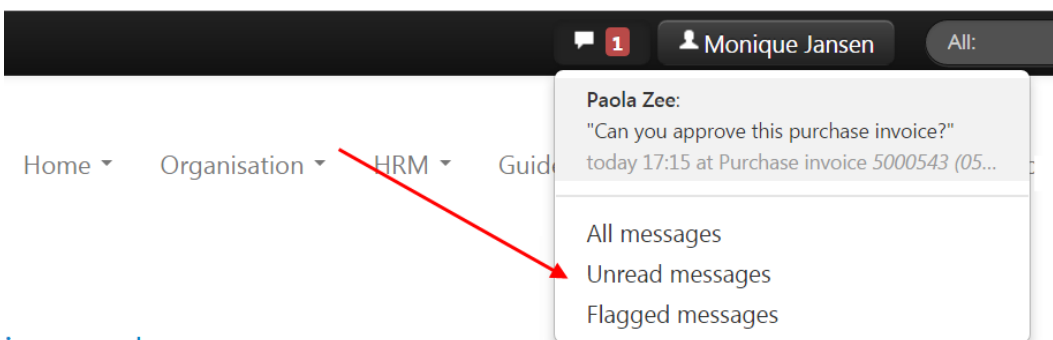
Notification of Messages & Comments

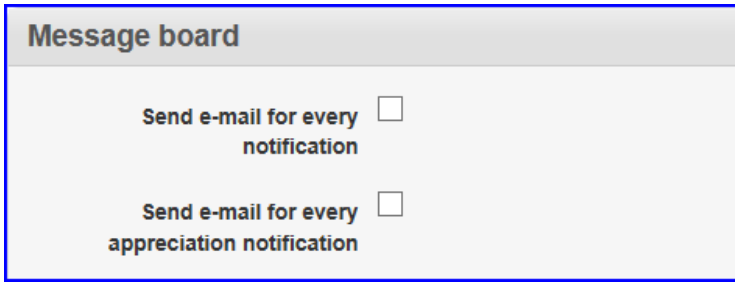
The Messages and Comments notifier keeps you up-to-date with new messages and comments addressed to you personally, or the social groups you are part of. In this notification, only the new unread messages are counted (and not the 'appreciates' that have been received). You will receive a notification each time a person posts a new message or a comment. A red box indicates how many new messages or comments you have received.



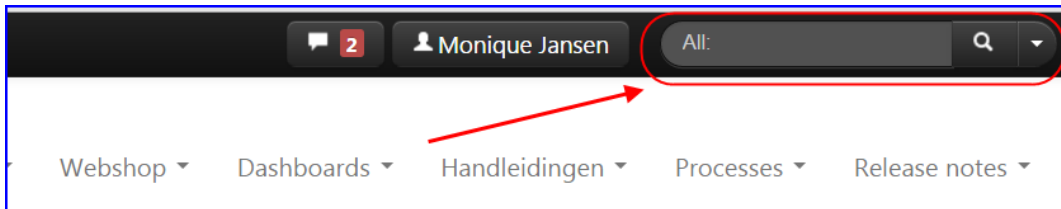
Click the notifier to view the new messages. A short preview of the first five messages and/or comments are shown in the pulldown menu. Unread messages have a grey background here; read messages are displayed with a white background. Just click on a preview to directly navigate to the message or comment. For your convenience, messages that you open from the pull-down menu this way are automatically marked as 'read'.

By clicking on *All messages*, *Unread messages* or *Flagged messages* you open your personal message board.





You may also receive an e-mail notification of every message or comment addressed to you, or when a message or comment is appreciated. You can specify your preferences in your **User settings** (MGBINS) screen or in your **Profile page** (depending on your authorisation).

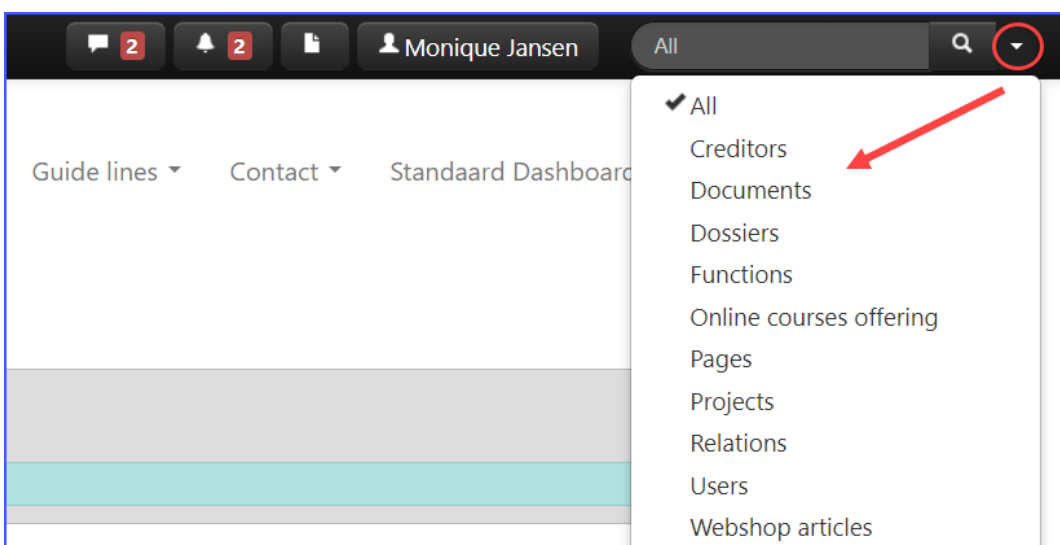


Search with the metabar (meta search)

The more information there is in AllSolutions, the more important it is to be able to quickly and easily find information in the system. That is why AllSolutions has the metasearch, a powerful search engine which you can use to search the entire system for **Feature/text pages, Relations, Projects, Functions, (published) Documents and Messages**, among other things. The metasearch can be found at the top right in the metabar. Your user account manages which entities you may search for in AllSolutions.

When you click on the arrow icon (next to the magnifying glass), you can select by which entity you wish to search. The list of entities in the pull-down menu shows the 10 entities for which you have searched most often. Type the desired text in the search field and click on the magnifying glass to start the search. The data found are shown on the right-hand side in the worksheet.

You can search on a word, parts of words, or combinations of words. In addition, you can also search by tags. Just type the hashtagged keyword in the search field (e.g. #knowledge). Do you wish to search by multiple tags? Then you only have to include a hashtag with the first keyword. For example, a search by '#analysis invoice' will show all data with both tags 'analysis' and 'invoice'.



Search results

Results for *allsolutions*

Search

allsolutions (Relation)

Visiting address: Berenkoog 27, 8300 AA EMMELOORD

Postal address: Berenkoog 27, 8300 AA EMMELOORD

T: 0348-430110

M: 06-12345678

sales@allsolutions.nl

Relation number: 00081596

With the **All** option, you can search in multiple entities at the same time. As a result, the data found can be featured in several categories, provided – of course - that the search term is found in those entities.

Search by entity

- All
- Articles
- Campaigns
- Circles
- Configurations
- Contact persons
- Contracts
- Courses
- Creditors
- Debtors
- Documents
- Dossier handling
- Dossiers
- Employees
- Fixed assets
- Functions

The right-hand side of the screen shows the **Search by entity** column. The coloured bar indicates by which entity you have chosen to search. If you wish, you can narrow down the search to one particular entity. You may also click on **More entities** to open more entities to choose from. The adjusted data found are shown in the worksheet.

Filter messages by entity

- All
- Documents
- File handling
- Requests
- Quality entries
- Projects
- Relations
- Pages

Assortment

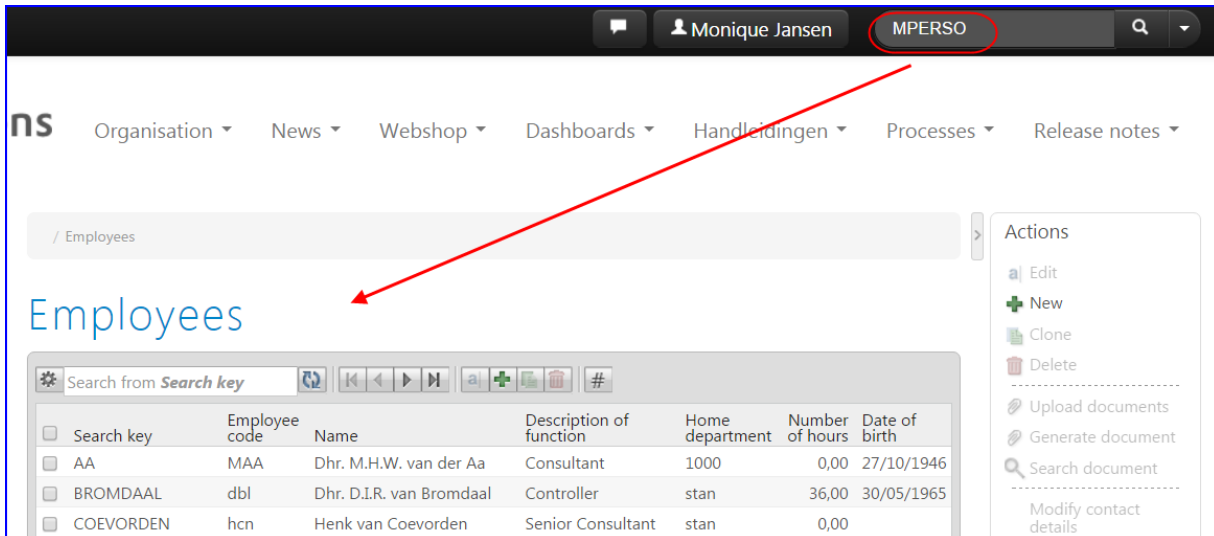
- Relevance
- Recent

When searching for messages: To make it easy to find a specific message or comment, the right-hand side of the screen also shows the **Filter messages by entity** column. The coloured bar indicates by which entity you have chosen to search. If you wish, you can narrow down the search to one particular entity. Just click on the entity of your choice. You can also set the sorting to **Relevance** or **Recent**. The adjusted data found are again shown in the worksheet.

Clicking a record that has been found opens the conversation in the message board. If you click on the name of the entity (at the top of the message) you can then click through to the information for the associated record. The settings in your user account determine which entities you are able to search by.

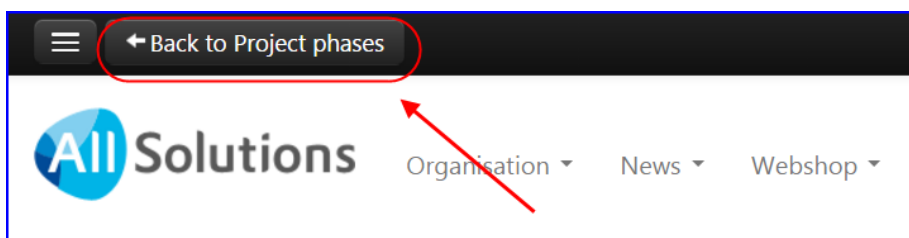
Fast function start-up

You can also use the search screen for a fast start-up of a function using its short code. (This code appears when you position your cursor on a function in the menu). Just type the function code directly in the search screen and search by *Function*, or choose *All*. The function will be started up in the work section in the right-hand part of the screen straightaway.



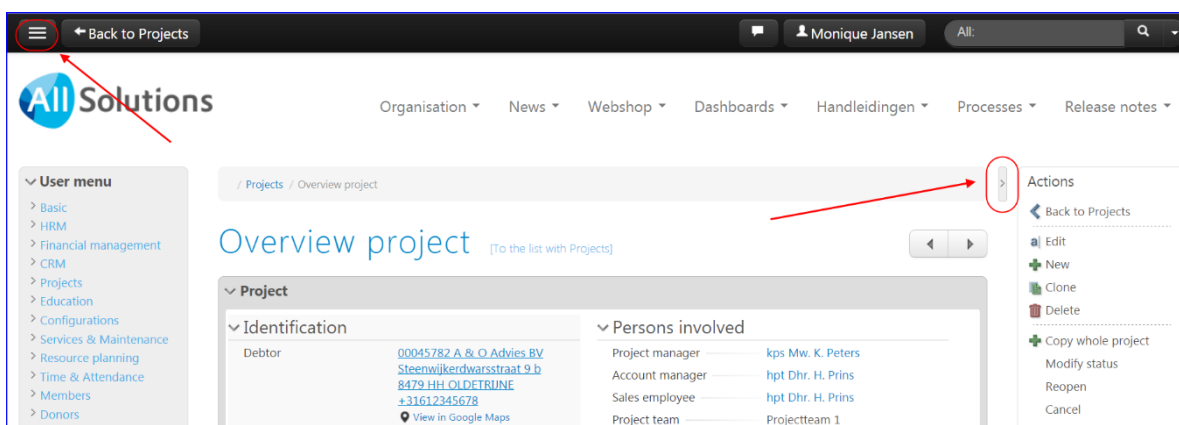
2.1.2. Navigation bar

The navigation bar is located on the left-hand side of the metabar, with which you can return to a previously 'visited' level.



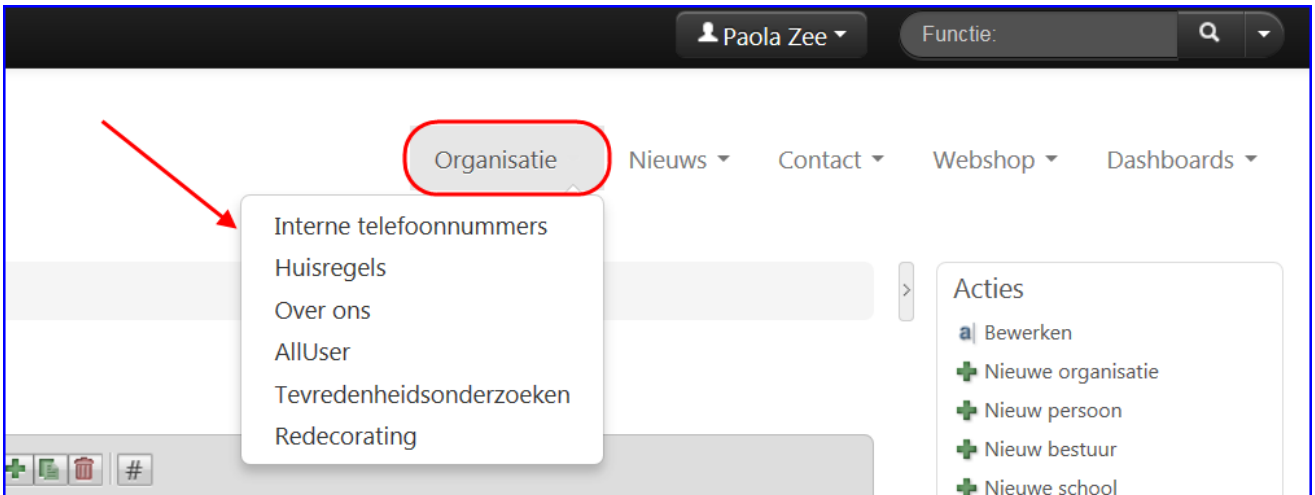
Hide screen

For an optimal overview, you can hide or show the left or right side of your screen via the so-called hamburger menu in the top left of the metabar or the button on the right of the screen, respectively. If you use Microsoft Internet Explorer, you can also use the hot keys L and R (provided that your cursor is not in an input field!). The system automatically remembers this setting. When you log in again or start a new session, the most recent toggle status is adopted.



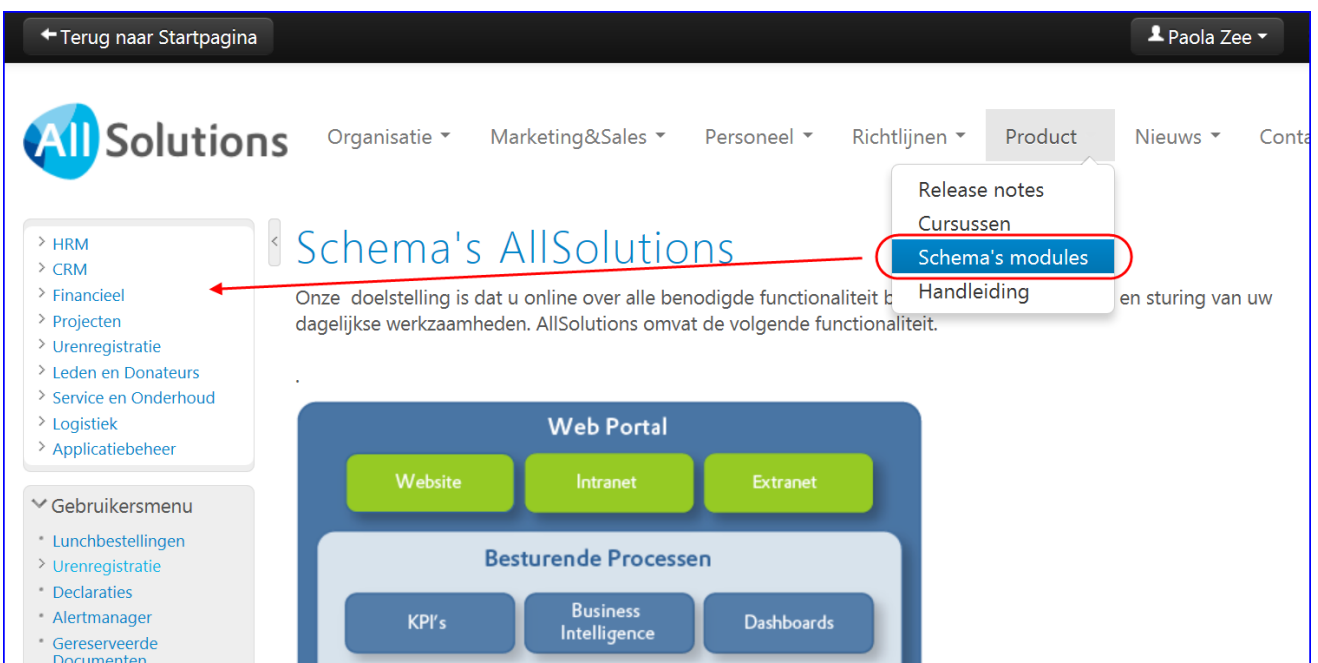
2.1.3. The top menu

The top menu is located at the top of the screen, directly under the metabar. A click on each item unfolds a small menu to navigate to the accompanying subjects.



When you click on a text page or function, this will be started up in the work section in the right-hand part of the screen.

When you start a submenu, the underlying functions appear at the left-hand side of your screen:

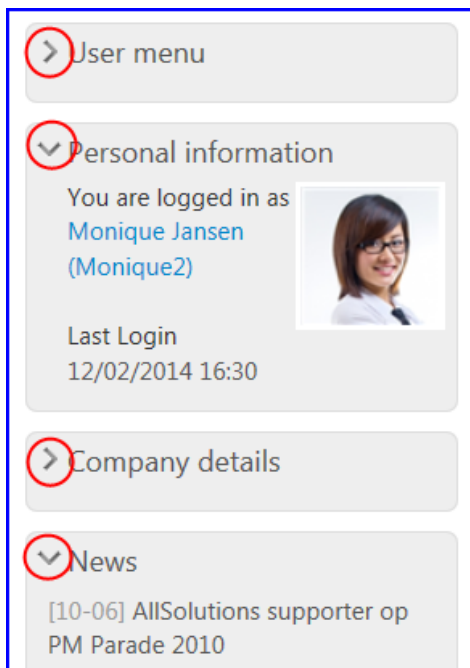


This works just like Windows Explorer: folders (preceded by an arrow icon) are organised in a directory structure and can be opened and closed. The folders can contain subfolders or other functions, or both.

2.2. The services section

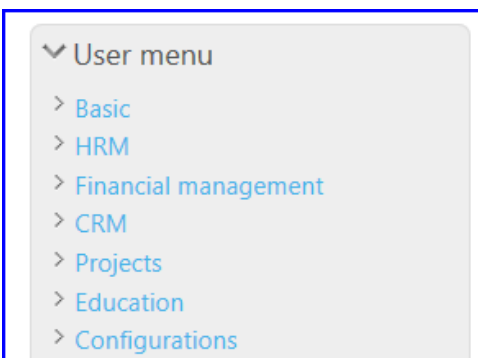
The services section is located on the left-hand side of the screen. This section contains, among other data, the following parts:

- The user menu,
- Your own login details (personal information),
- Your login department or office (company details),
- The alerts monitor,
- The news box,
- The documents inbox,
- Your favourite functions, and the most recent functions you have started up.



If you wish, you can open and close items with the arrow icon for the item in question. These settings will be saved by the system, by the way, when you log out and log in again. Remember this with respect to the alerts in the alerts monitor!

All items in the services section are explained in more detail below.



User menu


This is the menu you use to navigate through the system.

Every function in the system has its own short code (6 positions alphanumeric). This code will appear when you position your cursor on a function in the menu.



In this example, the short code of the **Employees** function is show: MPERSO.

You can use this code for a fast start-up of the function in question via the **meta search**.

✓ Personal information
 You are logged in as
Monique Jansen
 (Monique2)
 

Last Login
 12/02/2014 16:30

Personal information

The name of the user who is logged in is shown, and the date on which your previously logged in. Click on your user name to access your profile page (also see chapter 6).

✓ Company details
 Financial year/period
 2012/01
 Department
 stan - Demobedrijf AllSo

Company details

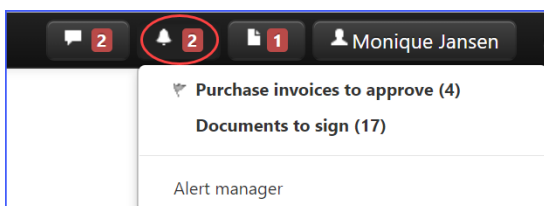
This shows you the company or department under which you are logged in, among other things. If you are authorised to do so, this is also the place where you can switch to another department. The filters that you set (in the main browser) are remembered then.

✓ Alerts
 ✓ Gereed te melden conceptfacturen
 (projecten) (5)
 ✓ **Openstaande acties (11)**
Openstaande meldingen (11)
Geëscaleerde meldingen (11)

Alerts monitor

Depending on your personal user settings, a number of alerts may be shown in your alerts monitor. Messages applying to you are shown in bold. The relevant number is shown between brackets. Often you will also receive an e-mail message, informing you that you have an alert.

These alert messages are 'hyperlinks': i.e. by clicking on the alert you go to the screen in which you can carry out the required action.



Alerts can also be included in the meta bar in the form of an alert notifier. This means the alerts are still visible and accessible if you hide the left-hand side of your screen.

✓ News
 [10-06] AllSolutions supporter op
 PM Parade 2010
 [09-06]
 Klanttevredenheidsonderzoek 2009
 [14-04] Nu lid worden van onze
 Organisatie

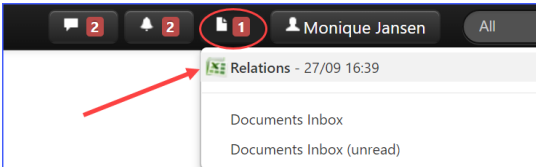
News

In the *News* box you can find news pages. When you click on an item, the page is shown in the worksheet on the right-hand side of the screen.



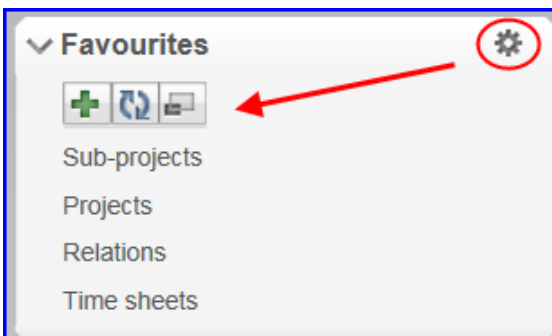
Documents Inbox

In AllSolutions you can use the export function to send a file to the **Documents inbox** on the left-hand side of the screen. When you click on the settings icon on the right, the delete button appears. Use this to empty your documents inbox.







The inbox documents are also included in the **metabar** (as a documents icon). This means the exported documents and processing reports are still visible and accessible if the user has hidden the left-hand side of the screen.

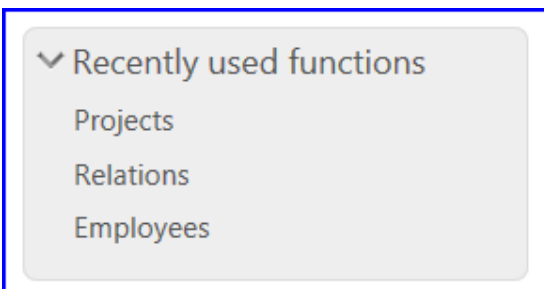
Clicking the documents icon opens a pull-down menu showing you the available documents (maximum of 10 documents). You can also go directly to their **inbox documents** (MINBOX) via this menu (provided you have authorisation for this function).



Favourites

In this section, you may include system functions that you often use, as your favourite functions. When you click on the settings icon on the right, three buttons will appear. Just click on the  button to add the function or entity on your worksheet to your favourites. Use the  button to refresh your favourites.

By clicking on the  button, you open the screen with your favourites. (Here you can also delete functions from your list of favourites with the  button.) The functions in this list are 'hyperlinks': i.e. when you click on one of these functions, you go to the screen in question.



Recently used functions

The system automatically records here which system functions you have used most recently. Again, these are 'hyperlinks': when you click on one of these functions, you go directly to the screen in question.



KPI's

If this function is activated, the chosen KPI's can be displayed as a separate part in the services section.

2.3. Work section

The section on the right is the work section. In this section, functions are started up when you click on them in the menu. The work section consists of the following components:

The screenshot shows a software interface with a breadcrumb trail 'Projecten / Subprojecten'. Below this, there is a section for 'Debiteur project' with details for '1003 - Amnesty International B.V.' including address and phone number. Below that is a 'Project' section for '00.0037 - Amnesty International'. A search bar is present with the text 'Zoeken vanaf Subprojectnumm'. Below the search bar is a table with the following data:

	Subproject-nummer	Omschrijving	Afdeling	Factureringswijze	Project-groep	Status subproject	Orderwaarde	Gefactureerd bedrag
<input type="checkbox"/>	☆ 001		asn	Regie	vpe	Bevestigd	1.295,00	0,00
<input type="checkbox"/>	☆ 002	oms+oms	asn	Vaste prijs	vpe	Bevestigd	-296,52	-296,52

On the right side, there is an 'Acties' menu with the following options: Terug naar Projecten, Bewerken, Nieuw, Klonen, Verwijderen, Documenten uploaden, Document genereren, Document zoeken, Subproject o.b.v. standaardproject aanmaken, Gehele subproject kopiëren, and Cursus open inschrijving toevoegen.

2.3.1. Title bar

The top of the screen shows the name of the function you have started up. You can start up more than one function, one after the other, to zoom in on the underlying data. Below the title bar will then also be shown which data you have zoomed in on. This is the data sheet.


The title bar is set up as a breadcrumb trail and is 'clickable'. i.e. the menu titles are so-called 'hyperlinks', with which you can return to a level previously 'visited', any time you want.

2.3.2. Worksheet or browser

This is the section in which you are working. It is set up like a browser.


The screenshot shows the title bar of a worksheet titled 'Relations'. It features a search bar with the text 'Search from Search key' and a series of function buttons: a gear icon, a refresh icon, navigation arrows, a search icon, a plus icon, a document icon, a trash icon, and a hash icon.


At the top of the worksheet a number of **Function buttons** are shown:

-  Display and filter button to select a different way of sorting or listing, or to use one of the filters.


Search from: Enter a 'hard' search term. May be used in combination with sorting or filtering, if you wish. Please note that this field only searches through the data of the first column shown in your screen. In Windows Internet Explorer, you can also use the Alt+Q shortcut key to quickly position your cursor in the search field. (In Firefox you need to use Alt+Shift+Q.)


  Start or refresh your filter or search


 Filter favourites


 Activate the function, with accompanying actions and shortcuts

 Directly enter the related data in the current data entry screen.


 Browse through the records

 Open the info browser (see chapter 3.3.1.)

 Open the edit browser (see chapter 3.3.2)


 Open the multi input browser (see chapter 3.3.4.)

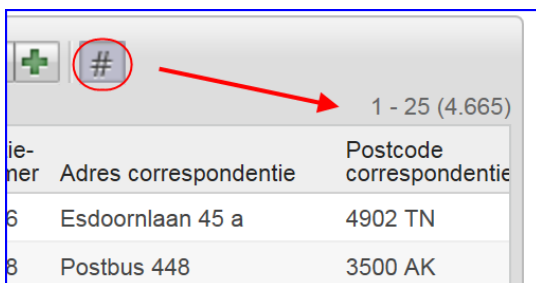
 Open a record to amend

 Create a new record by entering all data yourself

 Create a new record by copying the data from an existing record


 Delete

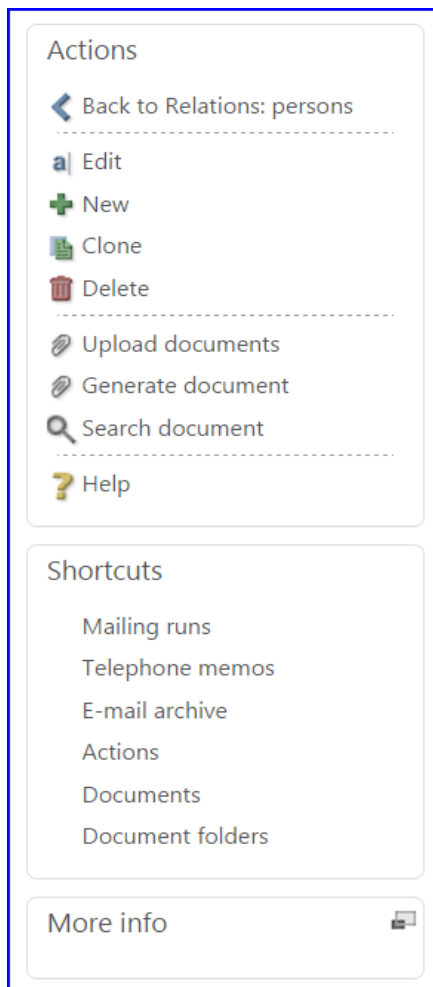
 Shows column totals (only possible for certain columns) and/or the number of records in a selection, e.g. 1-15 (21.615): From the 21.615 records in the selection, the records 1 through 15 are shown in the browser. In browsers without column totals and/or record counter, this button is not shown.



Usually, the screen is set to a maximum of 25 records. (The AllSolutions browsers can show a maximum of 50 records.) However, this does not mean there are only 25 records available in the system. There may be more records than you actually see in your screen.



You can use the arrow buttons to browse through the records. You can click on the  button at the top of your worksheet to show the number of records in your selection (Please note that adding up in a browser with large numbers of records may influence the performance).



Actions and Shortcuts

Depending on the authorisation, the right-hand side of the screen shows **Actions** with which you can carry out specific actions.

Via **Shortcuts** you can zoom in on underlying data.

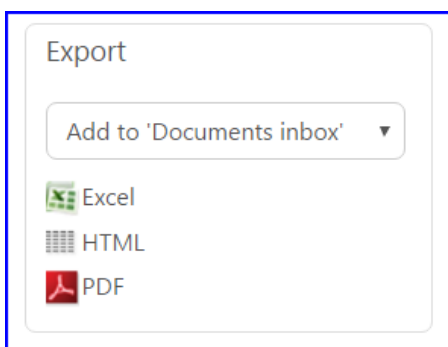
When you have zoomed in on the underlying data, you can always go back to the previous screen via the **Back** action.

The **?** question mark allows you to turn the online help on and off. (Please note that these are the standard help texts of the programme. Depending on client configurations, some functions may have changed or may no longer apply.)

Actions and Shortcuts are always on the right-hand side and are browser-dependent.

More info

May show you more information on the function you started up, e.g. a text page with accompanying user manual for the function in question.



Exporting data

If you wish, you can use the export box on the right-hand side of your screen to export the data in the various screens to Excel or to a PDF file, open them as a direct file on the left-hand side in your screen in the *Documents inbox*, or send it to yourself by e-mail as an Excel or PDF file.

[Contact](#) - [Privacy statement](#) - [ICT Office Voorwaarden](#) - [Kwaliteitsbeleid](#)

Footer menu

In addition, there is a so-called *Footer* menu at the bottom of the screen where extra information may be displayed. When you click on an item, the page is shown in the worksheet on the right-hand side of the screen.



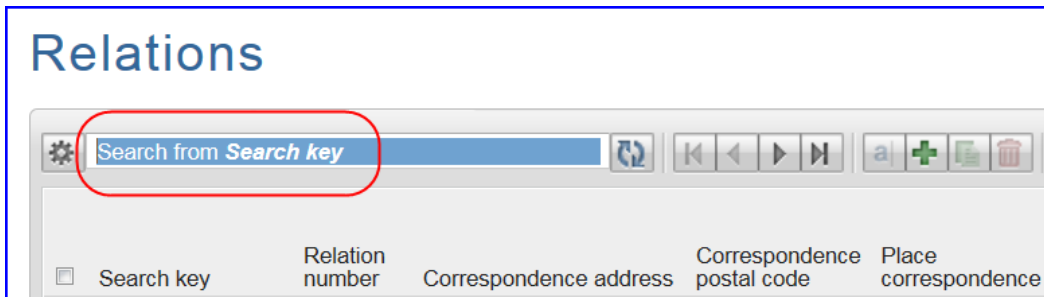
On published feature or text pages a number of 'share' icons are available at the bottom left of the screen, to share information on social media, such as Twitter, LinkedIn, Facebook or Google+. You can activate this option via the page settings. In addition, you can also share a page on the message board in AllSolutions, print a page or e-mail a link to a specific page.


3. Search and amend data

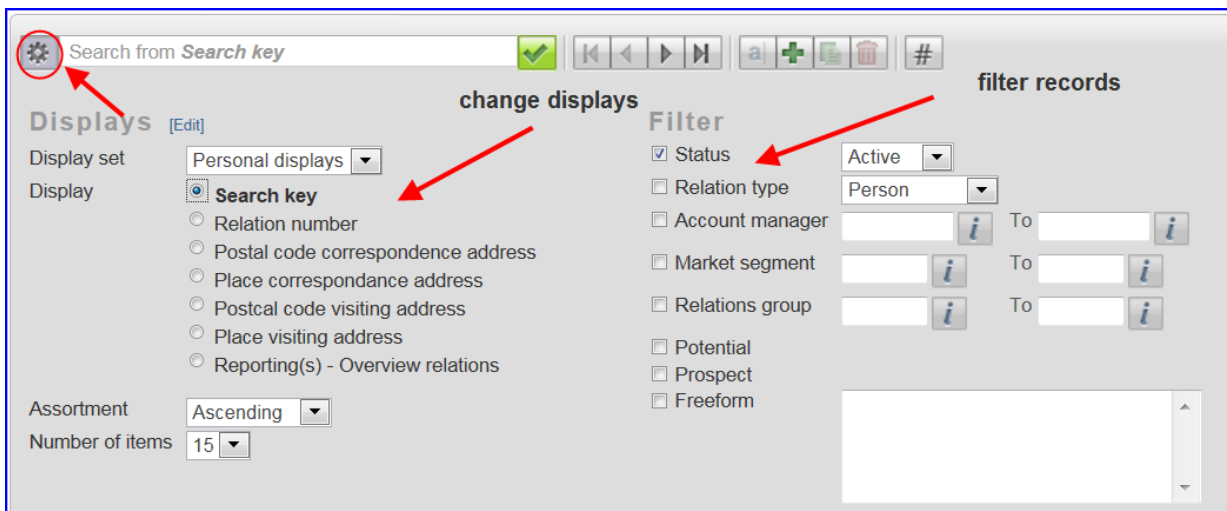
3.1. Search data


With the search field (metasearch) in the metabar, you can search throughout the system. In addition, you may search data in the browser in a number of ways.



The cursor is automatically positioned in the *Search from* search field at the top of your screen. In MS Internet Explorer, you can also use the Alt+Q shortcut key to quickly position your cursor in the search field. (In Firefox you need to use Alt+Shift+Q.)

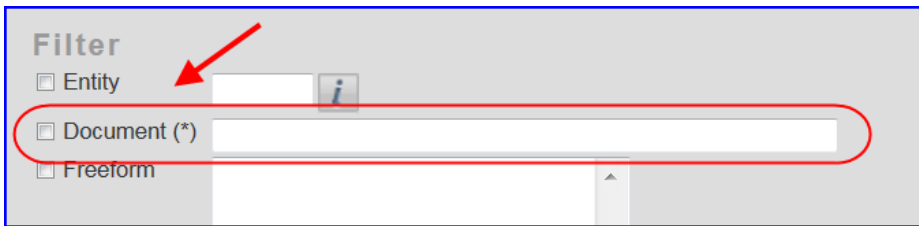


With the *Search from* field you search by a specific value in a field. Please note that this field generally only searches through the data of the first column shown in your screen. So the field you can search depends on the display you have chosen.. Click on the green  icon to carry out your search. (This button is shown as soon as you type in a value). By doing so, the view 'jumps' to the first record found that matches your search query



In addition, you can use the  display and filter button in every browser to change the information shown in your screen, or to change filter settings. The criteria offered in the browser depend on the function and the browser you are in.

Tip: When a screen is empty, it is possible that information is being excluded via a standard filter. If this is the case, click on the  button to adapt the filter and click on .



Sometimes you may use wildcards (* = asterisk) when filtering. Whether this is possible is shown in the filter by an * (e.g. in the document browser). You can type your search term directly in the filter fields with an (*); you do not have to place this search term between asterisks.

In a number of fields, you can use the **i** button to search for a value for a certain field in a table. **Important!** If you wish to change a value in an **i** field, empty the field first before you click on the **i** button. This ensures that you go to the first record in the underlying table.

Autosuggest

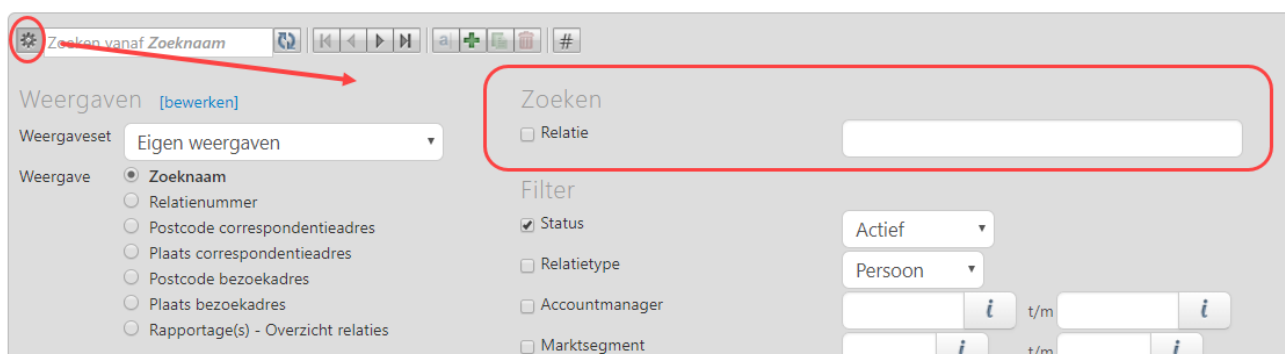
AllSolutions also has an **autosuggest** function. When entering information, you can enter a search term directly in a field, if wished. The system then gives suggestions for records (maximum of 10) that meet the search term and shows these in a dropdown box on the screen (in alphabetical order).

You can search not only for the start of the first word, but also for combinations of words separated by a space. If you enter one search term in a field, the search is automatically done in the field or column that is shown first in the list of suggestions. If you enter multiple search terms, all available fields are searched. Using a space in a field, such as the 'article number' field, shows records that meet this first in the list of suggestions.

Advanced search feature

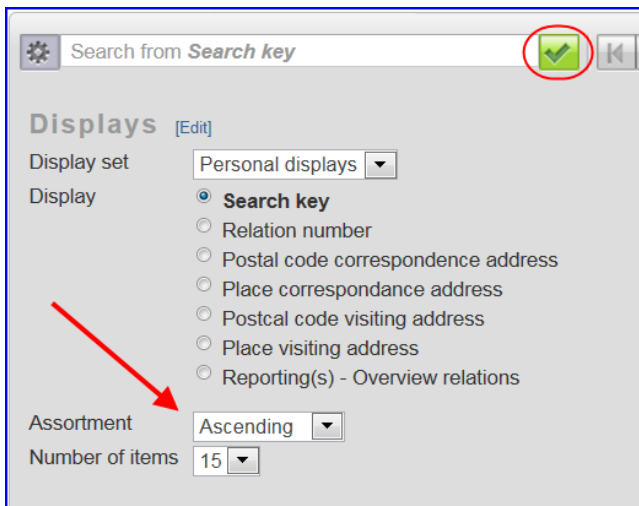
Based on the suggest functionality, an extra search field is available in (most) browsers. You can find this functionality via the settings button in the top left corner of the screen:



Relaties



This search field allows users to search/filter quickly and easily based on various data stored with a record.

Usually, the screen is set to a maximum of 25 records. (The AllSolutions browsers can show a maximum of 50 records.) However, this does not mean there are only 25 records available in the system. There may be more records than you actually see in your screen.



Through the  display and filter button you can also reverse the sorting order (e.g. Z to A instead of A to Z). Always click on the  button to activate your filter and/or display.

Select records

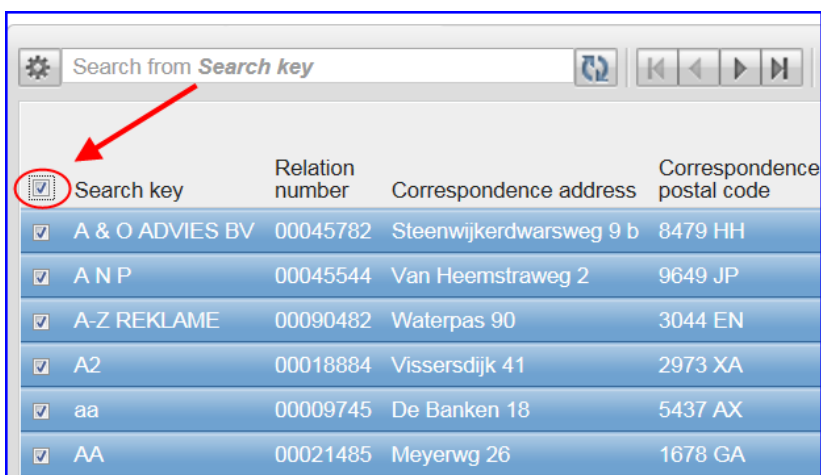
When you have found the data you need, you can select the record and navigate to further details in two ways:

- By checking the box on the left-hand side of the record and then clicking on the desired *function button* at the top of the browser, or
- By clicking on the centre of the line (an overview screen opens – also see next item in this chapter) and next on the desired *Action* on the right-hand side in the screen.

Depending on how you click on a record, the various *Actions* and *Shortcuts* become available on the right-hand side of the screen.

The first record in a browser is automatically selected when using a filter or search function. You can use the **Alt+1 up to Alt+9** hot keys (MS Internet Explorer) to quickly check and uncheck records in the list of records on your screen.

In various browsers you can also select all the records in the screen in one go by clicking on the box at the top of the list:



When you use this function, however, not all *Actions* and *Shortcuts* on the right-hand side are available.

Working with favourites

You can also mark your favourite records in AllSolutions' more major browsers. A handy way to easily track specific data.

The action **Mark/unmark as favourite** on the right of the screen lets you add records to your favourites, or remove them from the list of favourites. You can also click the star icon that has been added at the top of the screen. And the new 'favourite' function button at the top of the screen lets you easily filter records to show your favourites.

Zoeknaam project	Project-nummer	Debiteur-nummer	Zoeknaam debiteur	Afdelings-code	Status project	Orderwaarde	Gefactureerd bedrag
☆ ZWIKSTRA	04.7811	08959500	ZWIKSTRA	asn	Orderbev. verzonden	31.230,00	1.045,00
☆ ZWITSERLAN	00.3997	00543100	ZWITSERLAN	asn	Orderbev. verzonden	31.230,00	0,00
☆ ZWITSERLAN	04.5448	08495700	ZWITSERLAN	asn	Orderbev. verzonden	31.230,00	0,00
☆ ZWITSERLEV	02.0711	04654600	ZWITSERLEV	asn	Orderbev. verzonden	14.475,00	0,00

Figure 1: Marking favourites

3.2. Another way of navigating: via Overview screens

Search key	Relation number	Correspondence address	Correspondence postal code	Place correspondence	Telephone
A & O ADVIES BV	00045782	Steenwijkerdwaarsweg 9 b	8479 HH	OLDETRIJNE	0348-430110
A N P	00045544	Van Heemstraweg 2	9649 JP	MUNTENDAM	0348-430110
✓ A-Z REKLAME	00090482	Waterpas 90	3044 EN	ROTTERDAM	
AA GEBR.	00046093	Postbus 2001	8600 AJ	SNEEK	
AA RELATIEMAN.	00081230	Cereslaan 11	3241 MB	MIDDELHARNIS	0348-430110

When you click on the centre of a line or record, a so-called *overview* screen is opened. This overview screen shows you all the data of the record at a glance:

Overview organization [\[To the list with Relations: organizations\]](#)

Identification
 Relation number: 00090482
 Search key: A-Z REKLAME
 Department: stan Demobedrijf AllSolutions
 Relation type: Organization
 Status: Active

Persons involved
 Visiting address
 Name: A-Z Reklame
 Street: Waterpas
 Number: 30
 Postal code: 3044 EN
 City: ROTTERDAM
 Country: Nederland

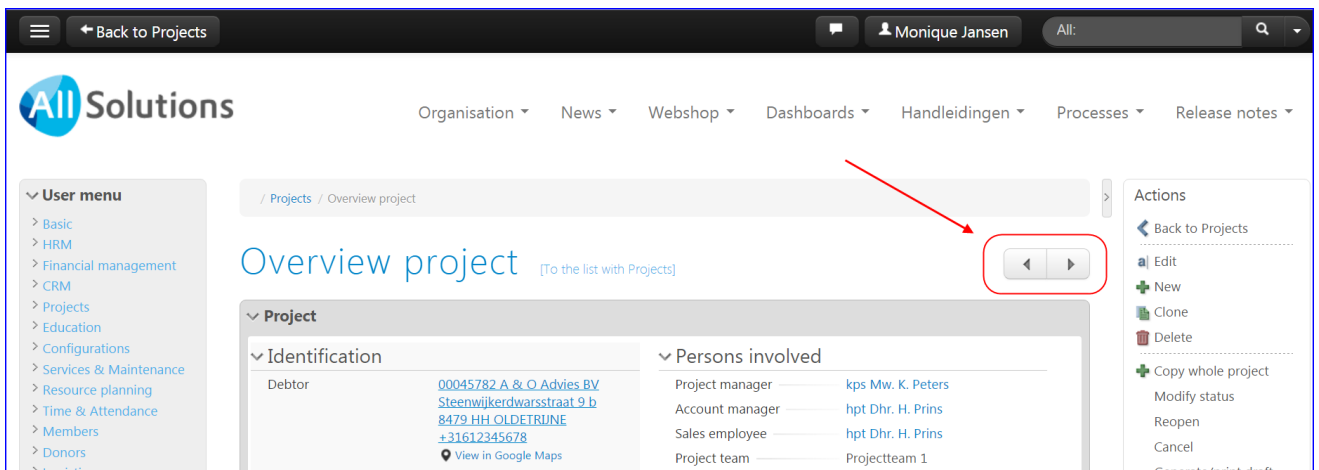
Correspondence address
 Relations sorts

On the left-hand side of the screen you can use the arrow icon to open or close the information shown. This information will be logged and saved under your user account.

The link now available at the top of the screen reads **To the list with.....** This is how you can return to the previous screen with the list of records.

Browsing records (within your selection)

It is possible to browse through the overview display. There are two arrow keys on the top right of the overview screen, which you can use to browse back and forth through the records. Of course the display and filter settings in the browser still apply when you are browsing.



Quick navigation via hyperlinks

Depending on your rights in AllSolutions, you can click through to other information in the system via hyperlinks in the overview screen. For example, you can click from an organisation in CRM directly through to the creditor data for this organisation. If there is a hyperlink, the information is underlined and if you move the cursor over the information on the screen, it indicates that the information is clickable:



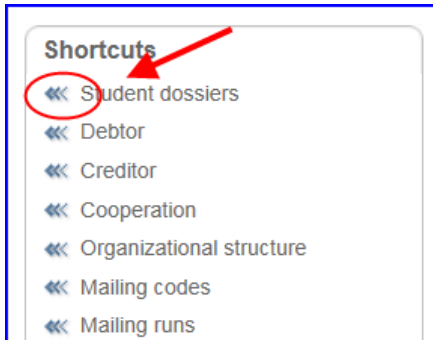
Return to the previous screen by clicking on the navigation bar or the bread crumb trail at the top of your screen.

In the overview screen, the web address – when listed with an organisation – is clickable as well and also works as a hyperlink.

Send e-mail message

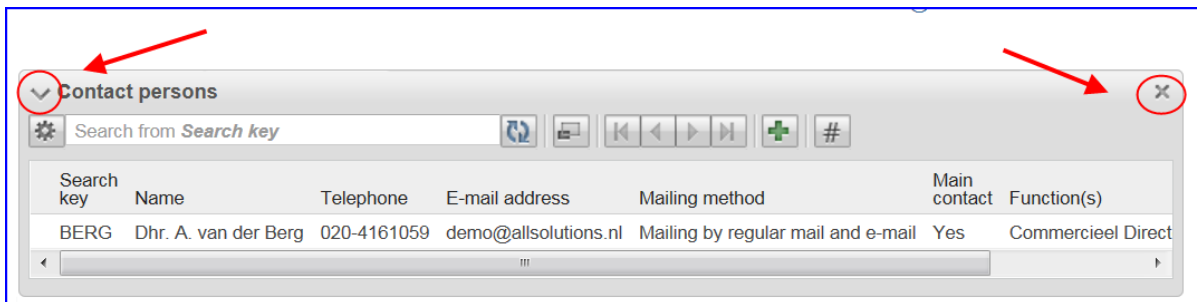
In addition, just click on an e-mail address in the overview screens to send an e-mail message to this address. Please note! This message will only be saved in your own 'Sent items'. If the integration with MS Outlook is configured in AllSolutions, you can still link the message to the desired relationship or function.

Promote shortcuts to 'webparts'



In the right-hand column you now see arrow icons preceding the names of the shortcuts.

By clicking on this arrow you can have the shortcut information added to the overview screen (default setting), as a so-called **Web part**:





In this example we have a default setting for the information of the contact persons under the overview of the relation. The Overview screens and the web parts allow you to navigate through the information quickly and in a new way.



Here too, you can click on the arrow icon on the left-hand side of the screen to open or close items. This information will be logged and saved under your user account.

Click on the cross on the right-hand side to delete items from your overview.

Please note that when you have added an item to an overview as a web part, this function is no longer shown as a *Shortcut* on the right-hand side of your screen! You must navigate to underlying information by way of the information in the screen.

3.3. Create and/or amend data

You can create a new record by clicking on the  function button, or on the  New action on the right. The data entry screen opens, and you can enter all desired information.


You can change the record data by clicking on the  function button or on the  Edit action on the right. This works in the same way as the data entry screen.


Relations / Organisation Create

Identification

Relation number


Search key

Department  Demobedrijf


Owner group 


Relation type Organisation


Status


Tags 



Persons involved

Account manager 


Internal employee 


Outdoor staff employee 

Via the  button you can search for a value for a certain field in a table.

Important! If you wish to change a value in an  field, empty the field first before you click on the  button. This ensures that you go to the first record in the underlying table.

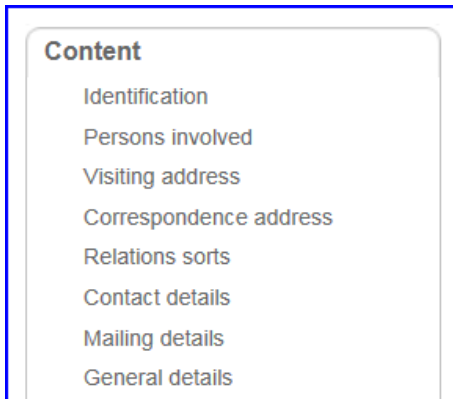
If you already know the value that you need, you can also type it directly in the field. Incidentally you may also select from the record suggestions the system gives you.

With the  calendar button you can easily select a date you need to enter. The calendar shows the days of the week and you can browse through it to your heart's content. The calendar opens as soon as you click in the date field. To navigate to another year, click on the month and year shown in the top part of the calendar.

By clicking on the  default button, you can enter related data in the screen directly.

Important! The navigation in AllSolutions is quite intuitive! In some cases, just one click on a field name switches a check on or off. Please pay due attention to this when you enter or amend information!

If you only wish to view information, always click on the *Cancel* button as a precaution, to make sure that you have not changed any data.

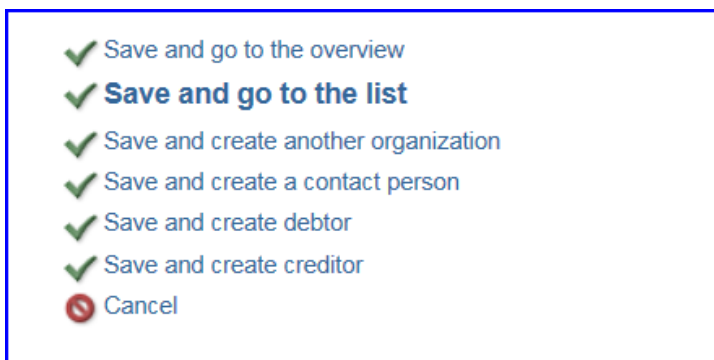


Content

When a data entry screen is opened, the *Content* section on the right-hand side of your screen shows an overview of the various available data groups.

You can click on one of these items to quickly go to the data group of your choice. This is handy when you want to amend certain data in an already existing record.

When you have finished with a record, you have various options at the bottom of the screen. (These options are also available as actions on the right-hand side of the screen.)



Save and go to the overview: Save the data and return to the overview screen. This screen shows all record data at a glance. This is useful in order to check the information you have newly entered or have changed.

Save and go to the list: Save the data and return to the browser, where you will see that the record has been added to the list.

Save and create another item: Save the data and open a 'new' data entry screen straightaway. This is a handy option when you want to enter several records. It saves you the trouble of returning to the browser and opening a new screen again. This button is only available when entering new records.

Cancel: Return to the browser without saving the data. This is the button you use when you only want to consult a record.

Please note! The newly entered or amended data are not saved until you have clicked on one of the Save options at the bottom of the screen!

3.3.1. Start function from the info browser

Relations group	<input type="text"/>	<i>i</i>	
Market segment	01	<i>i</i>	
Legal entity	<input type="text"/>	<i>i</i>	
Source code	<input type="text"/>	<i>i</i>	

An info browser is a screen that you access by clicking on an *i* button. The *i* button allows you to search in a table for a value of a specific field. If the data have not been entered into AllSolutions yet, and provided you are authorised to add data here, you can open a new session to do this.

Market segments

Search from *Market segment code*

Market segment code	Description
01	test

Click on the button for a new Internet tab of AllSolutions to be opened. You are logged in automatically, and the function is started. You can now enter the new data directly into this screen, or amend existing data. (In the above example of the projects menu, in which you can add the missing data.) After having done this, you can return to the tab with the previous session and continue what you were doing before.


Market segments

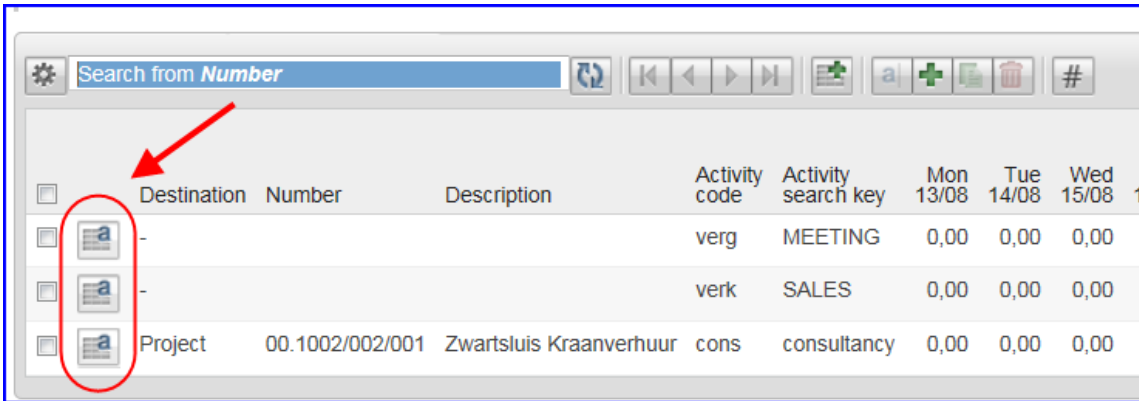
Search from *Market segment code*

Market segment code	Description
01	test

However, do not forget to click on the button first to refresh the information in the info browser. screen. Then you can directly select the data that you need.

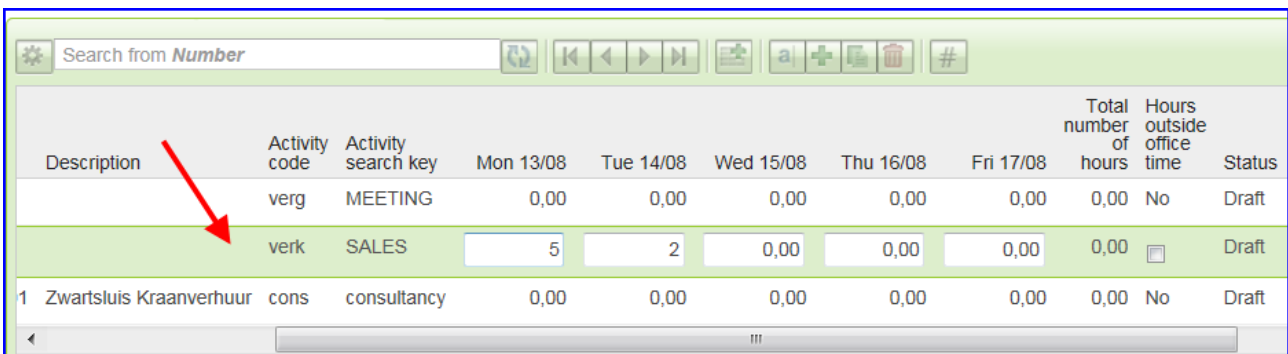
3.3.2. Edit browser

In some screens you can also quickly change data by activating data entry fields in the screen. This is possible in the screens in which you see a  icon on the left-hand side in each line:



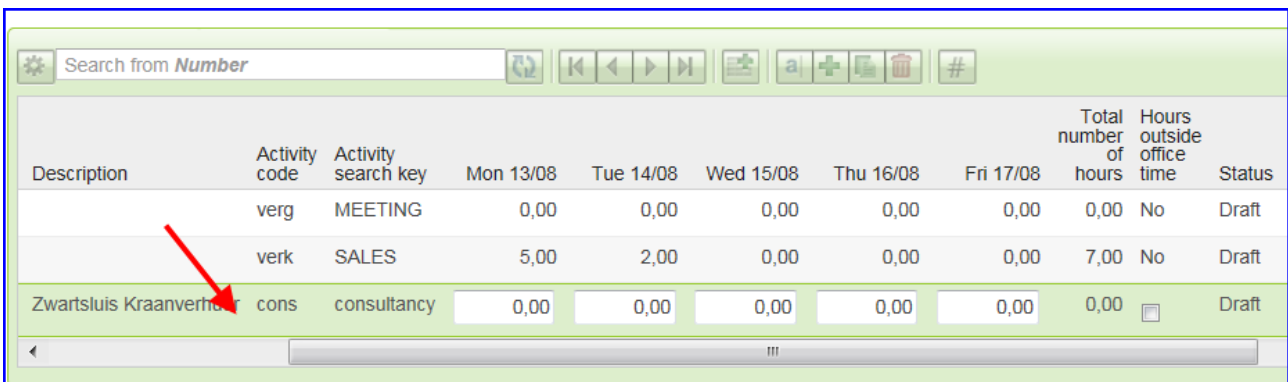
When you click on this icon, the screen is then shown in the shape of an edit browser. This allows you to change more than one record in the screen, without having to open a new data entry screen every time.

The edit browser looks like this:

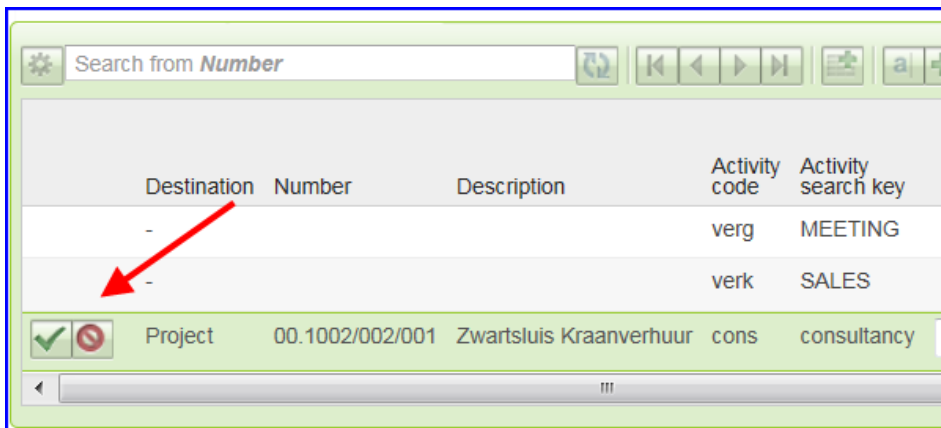


The data entry fields are opened line by line. However, you can use **Enter** to jump to the next line. By doing so, the data entry fields of the next line are automatically opened and the fields of the previous line are automatically closed and saved. With the **Shift+Tab** and **Tab** keys you can navigate back and forward through the fields in each line.

In addition, you can click with your cursor in any line of your choice at any given moment. By doing so, the data entry fields of the line in question are automatically opened (and the line you originated from, will be saved and closed).

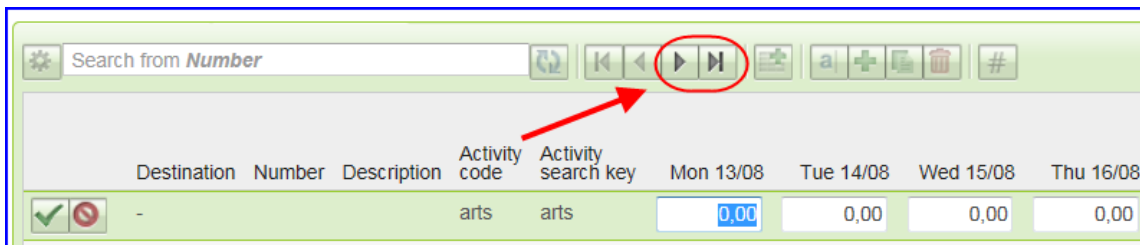


Click on the left-hand side in the line on the button to save data and to close the edit browser:




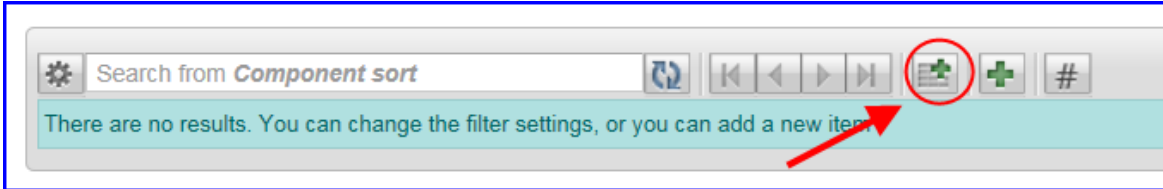
Or use *Enter* until the last line has passed and has been closed.

In addition, this edit browser allows you to use the arrow keys to browse through the records directly, without having to close the edit browser first.

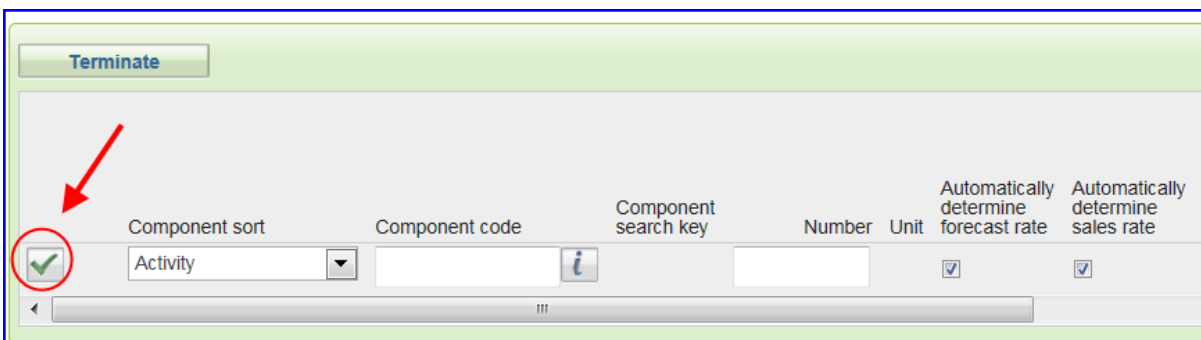



3.3.3. Multi input browser

In some screens data is not entered by way of opening data entry screens, but with a so-called multi input browser. This is a browser in which you can enter various records/lines, while remaining in the same screen. You recognize the screens in which this is possible by the  button at the top of the browser.



The multi input browser looks like this:



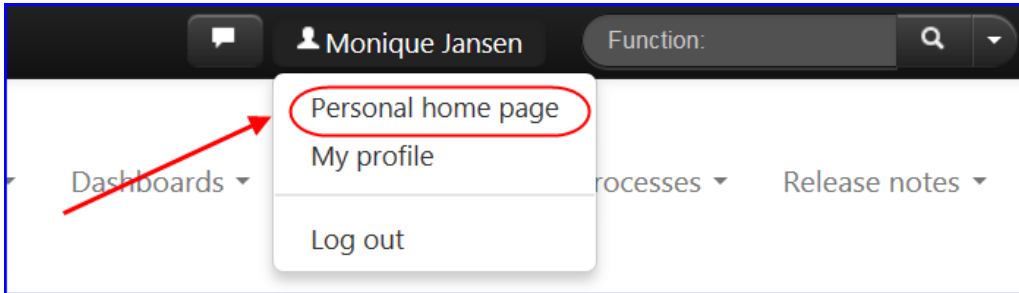
You can enter the required data line by line. Click on the left-hand side in the line on the  button to save and/or add data.

With the **Terminate** button at the top of the screen you close the multi-input browser. **Please note that when you use the Terminate button, the line that you entered last is NOT SAVED!** Use this button only if all lines entered have already been saved.


4. Personal homepage

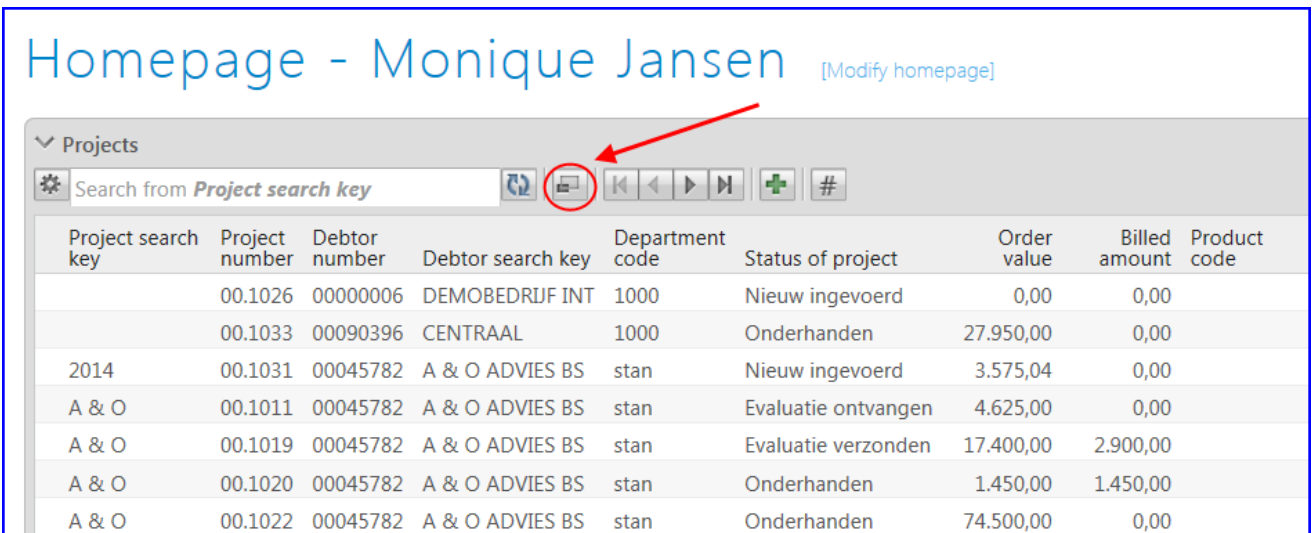
4.1. Navigate to and from your personal homepage

When you log into AllSolutions, you enter a general home page or a personalised homepage (depending on the settings in the environment).



You can navigate to your personalised homepage at any given moment by clicking on **Personal homepage** in your personal menu in the metabar at the top right of the screen or by clicking on the logo at the top left of the screen. If a general homepage has been set up in the environment (for example in the case of a 'web portal'), you return to the general homepage by clicking on the logo.

The personal homepage includes a few functions and/or reports by default. Considering that the personal homepage can contain different functions, no actions or shortcuts are shown here initially. After all, different actions and shortcuts apply to each function. You can activate the associated actions and shortcuts by clicking the  button at the top of the function you want to start up.

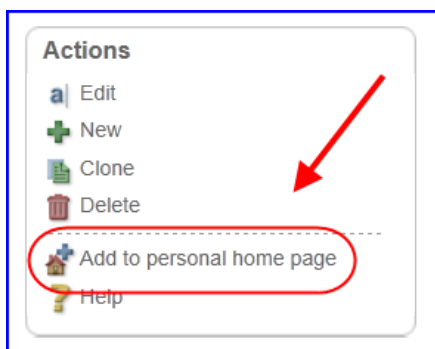


Project search key	Project number	Debtor number	Debtor search key	Department code	Status of project	Order value	Billed amount	Product code
	00.1026	00000006	DEMOBEDRIJF INT	1000	Nieuw ingevoerd	0,00	0,00	
	00.1033	00090396	CENTRAAL	1000	Onderhanden	27.950,00	0,00	
2014	00.1031	00045782	A & O ADVIES BS	stan	Nieuw ingevoerd	3.575,04	0,00	
A & O	00.1011	00045782	A & O ADVIES BS	stan	Evaluatie ontvangen	4.625,00	0,00	
A & O	00.1019	00045782	A & O ADVIES BS	stan	Evaluatie verzonden	17.400,00	2.900,00	
A & O	00.1020	00045782	A & O ADVIES BS	stan	Onderhanden	1.450,00	1.450,00	
A & O	00.1022	00045782	A & O ADVIES BS	stan	Onderhanden	74.500,00	0,00	

With the arrow icon on the left-hand side in the screen you can either open or close items on your homepage. This information will be logged and saved under your user account. The crosses on the right-hand side allow you to delete your items directly from your homepage.

Zoeknaam	Relatie-nummer	Adres correspondentie	Postcode correspondentie	Plaats correspondentie	Telefoon
A & O ADVIES BV	00045782	Steenwijkdwarweg 9 b	8479 HH	OLDETRIJNE	0348-430110
A N P	00045544	Van Heemstraweg 2	9649 JP	MUNTENDAM	0348-430110
A-Z REKLAME	00090482	Waterpas 90	3044 EN	ROTTERDAM	

4.2. Create or amend your personal homepage



When you have started up a function, you can add this to your personal homepage by clicking on the **Add to personal homepage** action on the right-hand side of your screen.



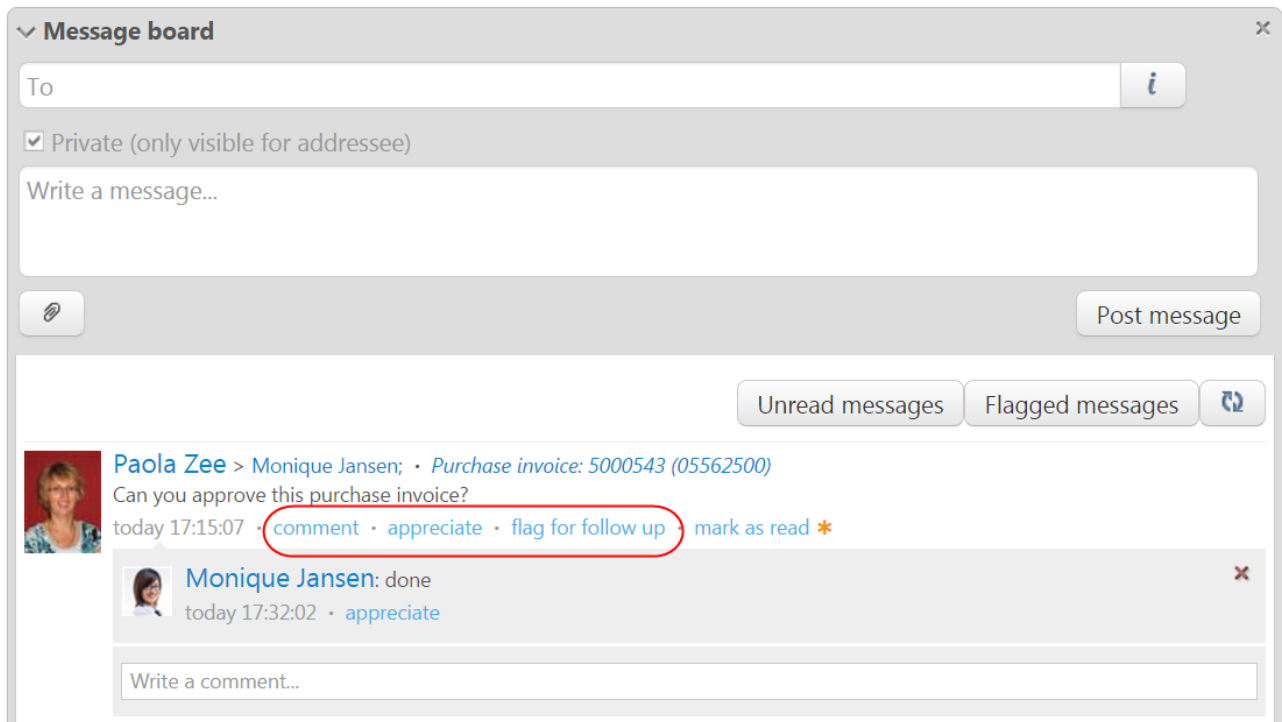
On your personal homepage you can use the **Modify homepage** function at the top of the screen to add or delete menus, functions and RSS feeds, or adjust the sequence on your homepage.

Incidentally, whether you can modify your personalised homepage is controlled by your user account.

5. The message board

The message board in AllSolutions makes it quick and easy for you to work with your colleagues and/or external relations on business processes, whether this involves a quotation, project, helpdesk entry, work order or personnel file. This keeps everyone up to date with the latest developments, while knowledge and information can be shared and found quickly.

The message board is shown at the bottom of the screen when you open an overview of a function or a text page. This way, you can have a discussion or follow a conversation directly where it belongs.

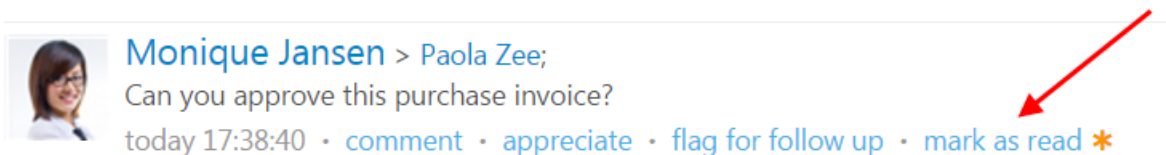


The screenshot shows a 'Message board' window with a close button (x) in the top right. Below the title bar is a 'To' field with an information icon (i). A checkbox labeled 'Private (only visible for addressee)' is checked. A text input field contains 'Write a message...'. To the left of the input field is a pencil icon, and to the right is a 'Post message' button. Below the input field are three filter buttons: 'Unread messages', 'Flagged messages', and a refresh icon. The message list shows a message from Paola Zee to Monique Jansen regarding a purchase invoice. The message text is 'Can you approve this purchase invoice?' and the time is 'today 17:15:07'. Action buttons 'comment', 'appreciate', 'flag for follow up', and 'mark as read *' are visible, with 'comment' circled in red. Below this is a reply from Monique Jansen saying 'done' at 'today 17:32:02' with an 'appreciate' button. At the bottom is a 'Write a comment..' input field.

Each user also has its own message board on their personal homepage. This message board will not only show all your own messages but also the messages you commented on. In addition, you can send messages which are not linked to a certain page or function. You may **comment** on a message, **appreciate** a message or comment, or **flag** a message for follow up. With the filter buttons, you can filter the unread messages or the messages you have flagged for follow-up.

Mark messages as read/unread

New messages are marked 'unread' by default and are marked with a 'star'. This is a personal characteristic: if multiple users receive a message-board message, the system tracks whether the message has been read individually for each user. You can use the action **mark as read** to mark a message (or deliberately **mark as unread** again).

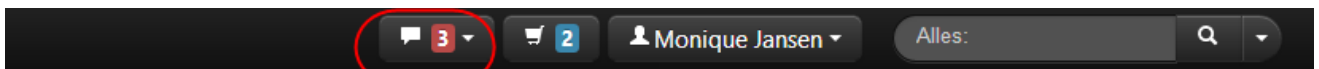
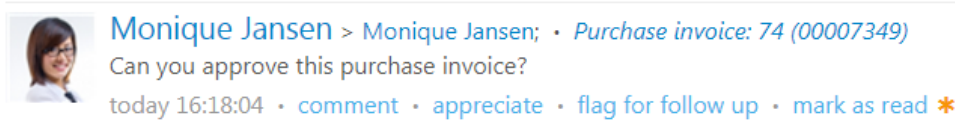
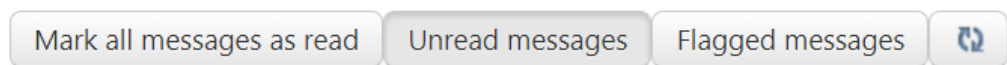


This close-up shows a message from Monique Jansen to Paola Zee. The message text is 'Can you approve this purchase invoice?' and the time is 'today 17:38:40'. The action buttons are 'comment', 'appreciate', 'flag for follow up', and 'mark as read *'. A red arrow points to the 'mark as read *' button.

If you comment on a message, this message is automatically marked on your message board as 'read'. For other people in the conversation (including the sender of the original message and any followers), placing this comment causes the message to be automatically set to 'unread' again. Incidentally, the (un)read mark is included in the first message of the conversation and is not recorded for the individual comments, in part because the message board only shows the last 2 comments under a message. This way, you can easily mark the entire conversation as read or unread using a single action.

Filter options

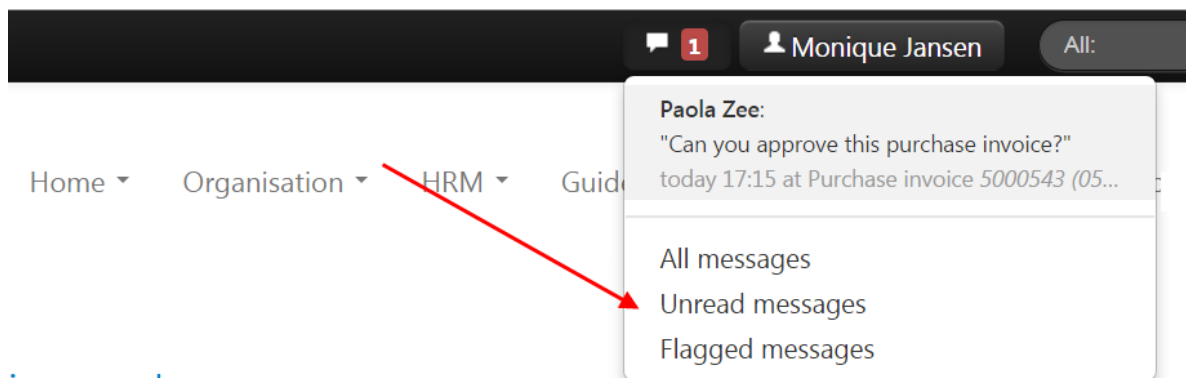
The message board has the **Unread messages** button, which you can use as a filter to quickly and easily view all the unread messages only. When you activate this filter, the **Mark all messages as read** button appears, which you can use to change the status of all messages to 'read' in one go. You can use the **Flagged messages** button to view messages you want to get back to.



Notification of Messages & Comments

The Messages and Comments notifier keeps you up-to-date with new messages and comments addressed to you personally, or the social groups you are part of. In this notification, only the new unread messages are counted (and not the 'likes' that have been received). A red box indicates how many new messages or comments you have received. Thus, your own messages and comments are not shown here. Click the notification to read the preview or to directly navigate to the message or comment. For your convenience, messages that you open from the pull-down menu this way are automatically marked as 'read'.

The pulldown menu in the notifier also has three other options: *All messages*, *Unread messages* and *Flagged messages*.



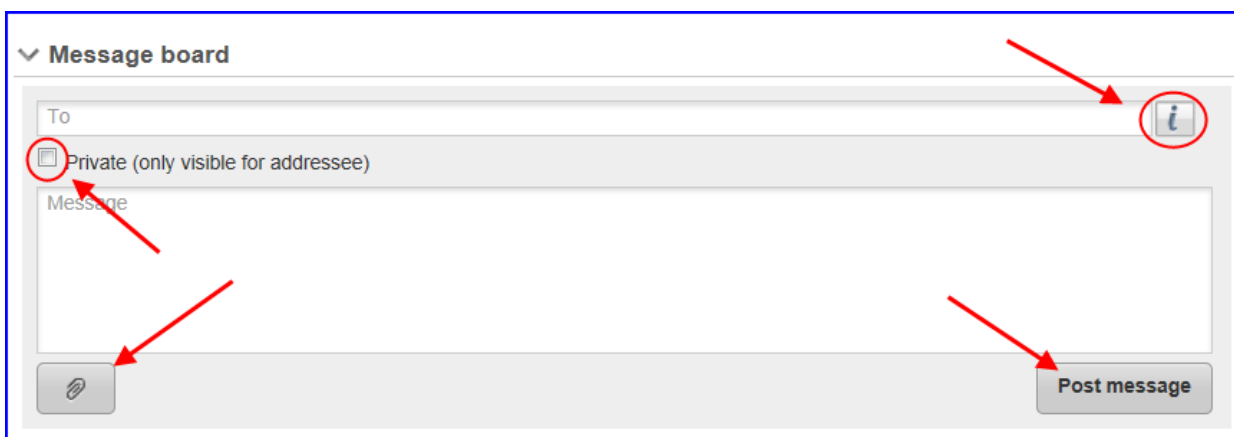
Clicking one of these options starts your personal message board, which may automatically be filtered to show either all *Unread messages* or all *Flagged messages*. If you choose *Unread messages*, you can then manually indicate which messages you want to mark as read. You can use the action button **Mark all messages as read** to set the status of all messages to 'read' in one go.

You may also receive an e-mail notification of every message or comment addressed to you. You can specify your preferences in your **User settings** (MGBINS) screen or in your **Profile page** (depending on your authorisation). You can also indicate whether you want to receive an e-mail when someone 'appreciates' a message or comment. The e-mail message includes a direct link to the message-board message: *Comment on this message*.

Clicking the link takes you directly to the message on the message board. If you are already logged in to the environment, then you do not need to log in again and you will automatically go to the right location on the message board.

5.1. Post a message

Go to the function or text page where you wish to post a message and open the overview screen of the record in question. The message board is located at the bottom of the overview or text page. You may also use your own message board on your personal homepage.




- Click on the **i** button next to the **To** field and select the persons and or social groups who you wish to address. You may also type the name of the addressee directly in the **To** field. The system will give you suggestions for persons found. Do you have more than one addressee? Then use a semicolon as a separator. When the **To** field is left empty, the posted message will only be sent to the followers of the function or text page in question.
- Do you wish to send a message to a specific addressee only? Then check the **Private** box.
- Type your text in the **Message** field. (There is no limit to the number of characters of a message. The e-mail that may be sent from the message board, however, can contain up to 4000 characters.)
- Click on the **paperclip button** to add one or more files as attachment to your message. (Please note: This option is only available on your personal message board and on the boards of functions where documents can be archived.)
- Click on the **Post message** button at the bottom of the message field to post the message.

Post a comment

It is just as easy to comment as it is to post a message.



- Click on **comment** and type your response in the available field. When earlier comments were already posted, you can start typing directly in the **Write a comment...** field. (You can enter up to 2.500 characters.)
- You may click on the  button to add persons or social groups as an addressee to this message and accompanying comments.
- Click on the **paperclip button** to add one or more files as attachment to your comment. (Please note: This option is only available on your personal message board and on the boards of functions where documents can be archived.)
- Click on the **Post comment** button to post your comment.

Formatting text

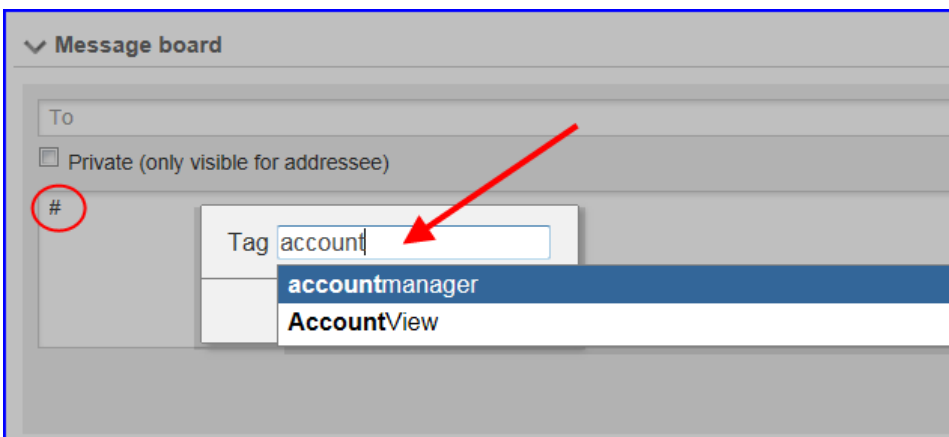
You can use the following options to format the text in messages in the message board:

- **Italic:** put text between single asterisks; **example**
- **Bold:** put text between two asterisks; ****example****
- **Bold and italic:** put text between three asterisks; *****example*****
- **List of bullet points:** start line with a dash ('-') or asterisk ('*') followed by a space
- **Numbered list:** start line with a number followed by a point or space

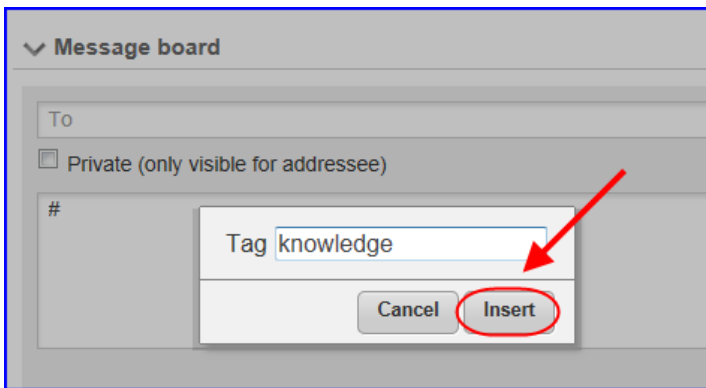
Use a backslash in sentences starting with a number followed by a point to prevent them from being turned into a list of bullet points. For example: 2016\. What a fantastic year.

Using tags

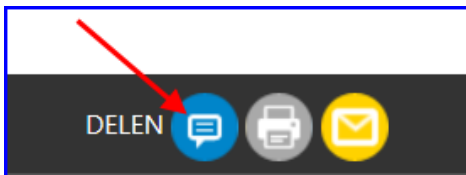
You can also tags in the message board. The # symbol, called a hashtag, is used to mark keywords or topics as a tag. Always use the hashtag symbol # before a relevant keyword or phrase. As soon as you type in a hashtag, a popup screen automatically opens where you can type in your keyword. The system will show you immediately if the tag is already listed:



Click on **Insert** to add your tag to the message or comment.



In the message board, tags also work as hyperlinks. Clicking on a hashtagged word in any message or comment shows you all other messages and comments marked with that keyword. In addition, you can use tags to search by messages via the search screen (meta search). Just type the hashtagged keyword in the search field (e.g. #knowledge) and click on the magnifying glass to start the search. The messages and comments found are shown on the right-hand side in the worksheet.



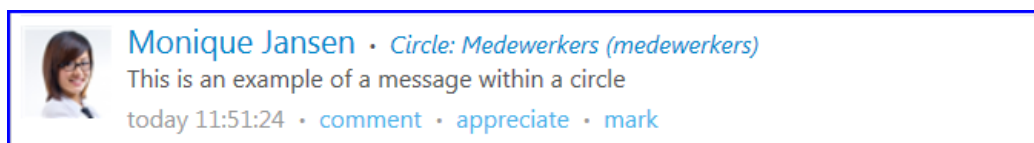
Post a page to the message board

Via a special icon on the bottom left-hand side of your screen, you can post a page to the message board and, in addition, add a message. Just below your message, a short introduction of the page is displayed.



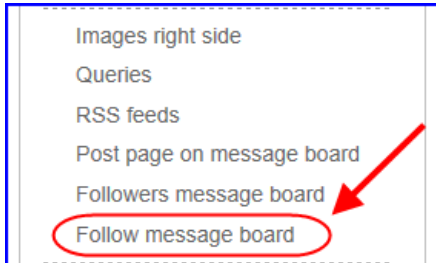
Share messages with Circles

You can also share messages with Circles in AllSolutions. Users can then only see these messages if they have been authorised via the circle. This means there is no form of address field when you post a message via a circle. The message is automatically shared with the persons who are authorised via the circle. You will see the circle the message has been placed in at the top of the message. Clicking the circle name will take you straight to the circle page.



5.2. Follow a message board

Go to the function or text page where you wish to follow the message board. If necessary, open the overview screen of the record in question. The message board is located at the bottom of the overview of a function or a text page.

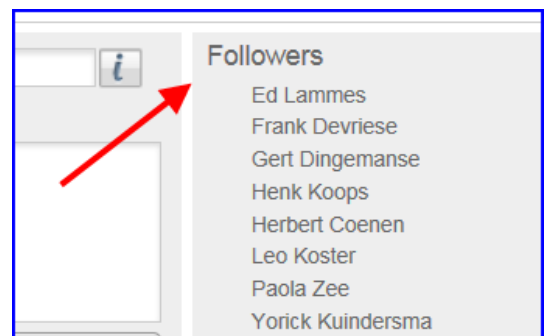
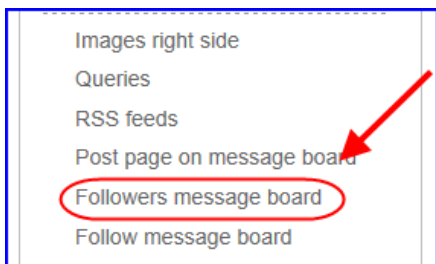


Click on the **Follow message board** action on the right-hand side of the screen to list yourself as a follower of this message board. As a result, the messages posted here will automatically appear in your own message board on your personal homepage.

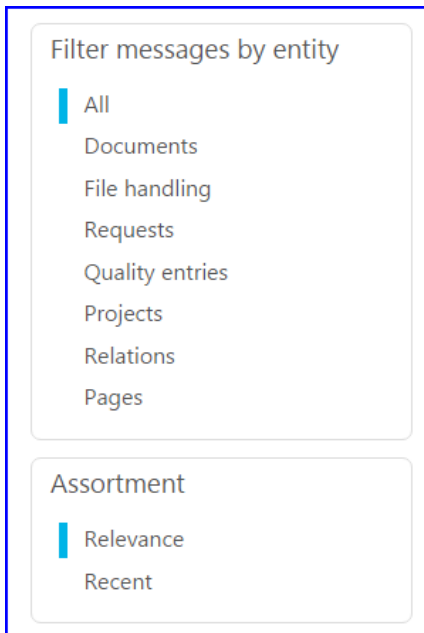
You can use the **Unfollow message board** action to discontinue following this message board anytime you wish.

List other followers message board

You may also list other persons as followers of a certain message board. Provided you are authorised to add followers, the function or text page will feature a **Followers message board** action (text page) or shortcut (function) on the right-hand side of the screen. Use this action or shortcut to list other users or social groups as follower of the message board in question. On the right-hand side of the message board, the list of followers is shown:



5.3. Search for messages or comments

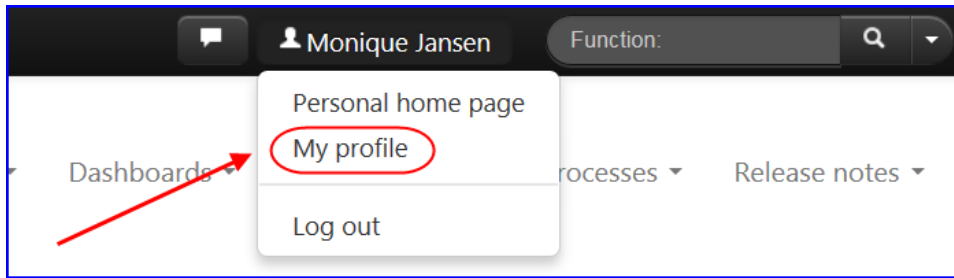


With the search screen (meta search) you can search throughout the system, among others **by message**. To make it easy to find a specific message or comment, the right-hand side of the screen also shows the **Filter messages by entity** column. The coloured bar indicates by which entity you have chosen to search. If you wish, you can narrow down the search to one particular entity. Just click on the entity of your choice. The adjusted data found are shown in the worksheet.

Clicking a record that has been found opens the conversation in the message board. If you click on the name of the entity (at the top of the message) you can then click through to the information for the associated record.

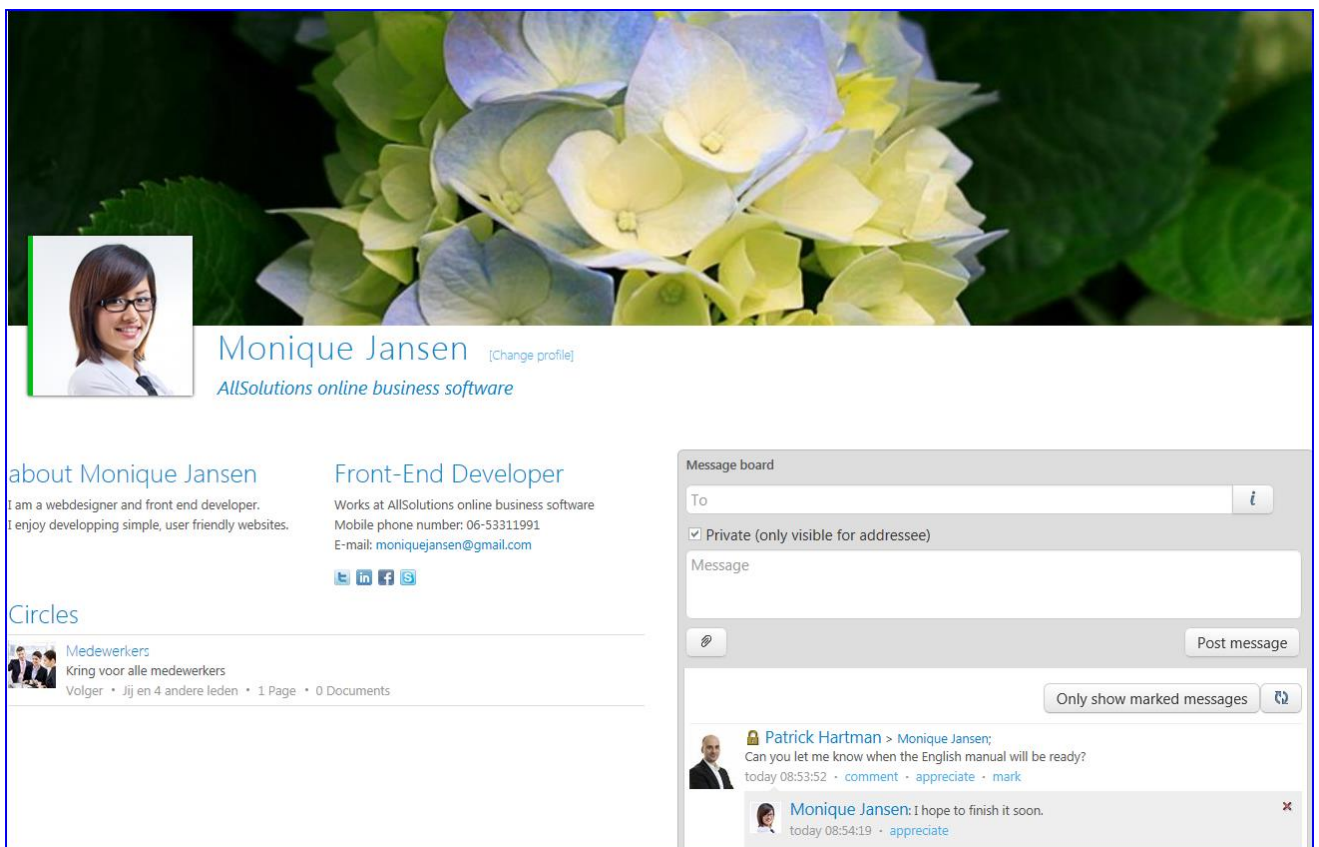
In addition, you can use tags to search for a message. Just type the hashtagged keyword in the search field (e.g. #knowledge).

6. Profile page



Within AllSolutions, each user has its own profile page. To navigate to a profile page of a certain user, just click on the user's name. The profile page features the following parts:

- Profile image (is also used in the message board)
- User name, employer and job title
- Cover image
- Contact details (direct phone number, mobile phone number, e-mail address)
- Social media (Twitter, LinkedIn, Facebook and Skype)
- Expertise (based on own tags (max. 32); frequently used tags are displayed in a larger format)
- Circles of which the user is a member
- Message board



Example profile page

In the profile page, tags also work as hyperlinks. Clicking on a word in the **tag cloud** shows you all other data with the same tag. Just click on a **circle name** or image to navigate to the corresponding circle page.

With either the **Change profile** action, or the **User settings (MGBINS)** function, you can adjust your personal settings and preferences (depending on your authorization). In this screen you can view your user name and e-mail address. You can also upload images.

User settings


Identification

User Monique2


Name

E-mail address

Profile

Profile image 

Delete profile image

Cover image 

Delete cover image

Move number of pixels up.

Use move number of pixels

About me

Security

Password

Verification

In addition, you can directly change your password here. Please do remember to click on **Save** to save your new password!