Spotlight – SERP – Personal Desktop

Preparation if using demo data attached

1. Import Demo Data

2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99

3. Make sure there is a folder on the person desktop called Nominal Ledger

4. Make sure there are reports dragged into the folder, specifically Profit & Loss

5. Make sure Contacts register is on the Personal Desktop

6. Drag Project Budget 2001003 to the Personal Desktop (Module>>Job Costing>>Register>>Project Budgets)

7. Place a PDF copy of the latest Release Notes on your computer desktop

8. Make sure the weblink for MyStandard is on the Personal desktop and opens the MyStandard page when you select it.

9. Open Contacts Register >> Move to left top corner of the screen >> Save the window position

SCRIPT:

To make working with Standard ERP even easier, every user can customise their Personal Desktop to have shortcuts to the most used parts of the system, links to the web and frequently used reports

ACTION: Have Standard ERP Navigation Centre open

The Personal Desktop provides immediate access to records, registers, and your most used reports.
As we see here I have a folder which contains all the reports I use on a regular basis.

ACTION: Select Nominal Ledger Folder

From here I am able to run the profit and loss report and have the information displayed to me in just three easy steps

ACTION: Select the Profit and loss report >> Select on run

For a project manager dealing with the number of different projects but wants to view the details of one specific project, all they need to do is select the particular project, and its information will display immediately.

ACTION: Select on Project Budget 2001003

With the personal desktop you can create a link to any specific record such as a project, customer or supplier and even a specific contract that you work with on a regular basis.

Later today Im anticipating a phone call from a customer, so I can easily drag and drop their Contact Card to the Personal Desktop,

ACTION: Select on contacts register on Personal Desktop, highlight the first customers, and drag them to the personal desktop, double click on customer to open contact record

Attaching files to the Personal Desktop is easy as well

ACTION: Select the + sign on the Personal Desktop and select Attach, chose file you want to attach, preferably a marketing PDF file

by doing so I will be able to open this file from within Standard ERP, giving me direct access to the information I need

ACTION: Open attached file

With the Personal Desktop I can also access web-links I use regularly, for example, this link for which I have already created a shortcut on my Personal Desktop allows me to quickly access the MyStandard portal.

ACTION: Select the mystandard.hansaworld.com link

I can chose whether to open the link within Standard ERP or use my external default web browser.

ACTION: Highlight the MyStandard link on the Personal Desktop and Select the + sign and select "Edit Web Link, show paste special options in "Open" field

Efficiency and direct access are just two of the many benefits you will receive when you and your users setup and use the Personal Desktop in Standard ERP