



**inventory 2 invoice**  
business software made easy.

**Nimble**  
BUSINESS SERVICES

Training Guide: Log In and User Section

Version 001

Training Prerequisite: i2i Training Session

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## Log in

**i2i** inventory 2 invoice  
business software made easy.

v014.003.000 (Sample Data)  
For All Support: [help@i2i.biz](mailto:help@i2i.biz)  
web: [www.i2i.biz](http://www.i2i.biz)  
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**i2i** inventory 2 invoice  
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User Name:    
Password:

Registered to:

When you open i2i for the **first time**, log in with your username and your password which would have been provided by your system administrator. You can see that you have a few options on the log in page.

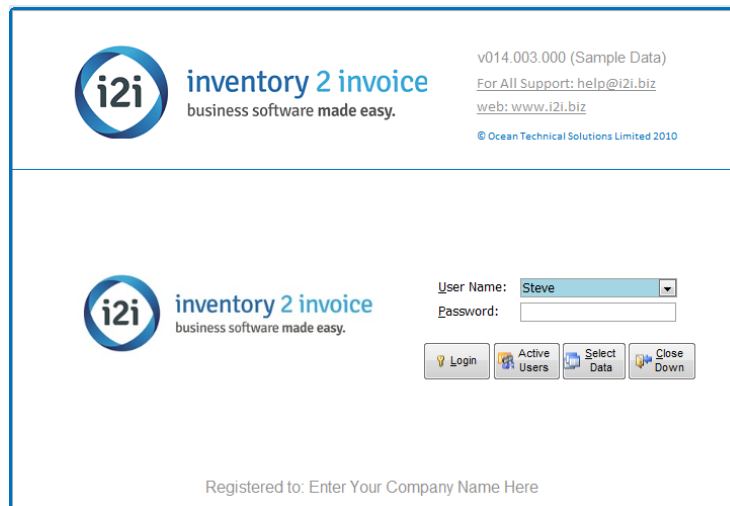
**Login:** This simply approves your log in once your username and password has been entered and then you will be granted access to the i2i system.

**Active Users:** By clicking this you will be presented with a list of users that are logged in to the system at that time. As the system is billed on a concurrent user licence limit you will be able to see how many users are currently in the system and you can form here prompt a user to log out of the system if you have reached your user licence limit.

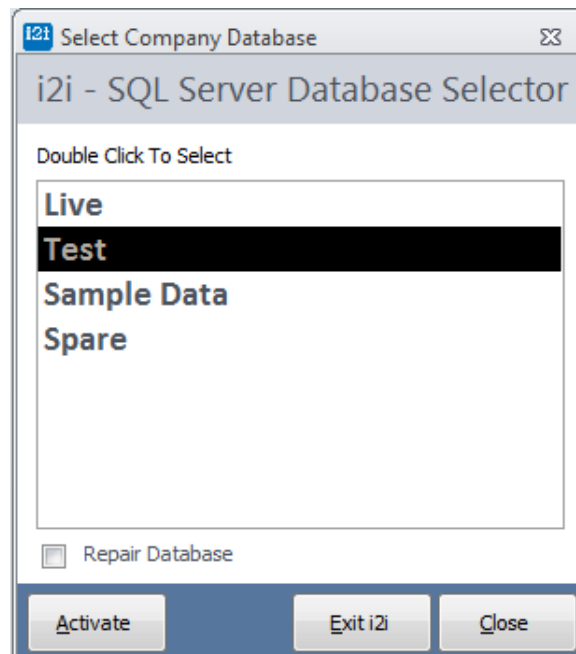
**Select Data:** This is where you can select whether you want to log in to 'live data', 'test data', 'sample data' or any other databases which you may have set up. This is where you will switch data in order to carry out tests etc. (See instructions below).

**Close Down:** This is how you close down the system if you do not wish to proceed.

## Selecting Data

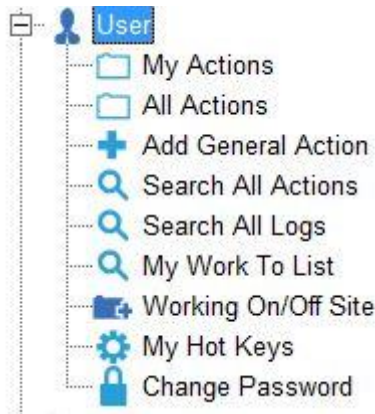


Before you log in you can select which data you require. Press “select data”



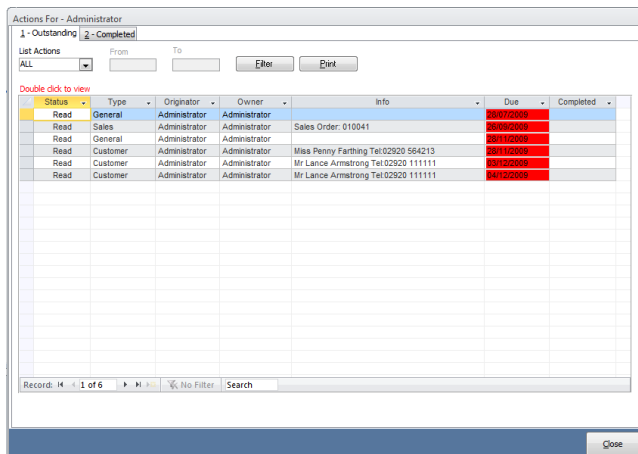
Choose the data and press “Activate”. You may need to log back into the system again. This is also where you will find your test environment if you want to practice something on the system. You will be prompted every 10 minutes to state that you are in test data (Please remember that any work completed in here cannot be transferred into the Live Database.) Your i2i Icon will turn Red also to let you know that you are in test data instead of Live data (Live data Icon is Blue).

## Users



You can see from the menu here the full list of options within the user tab section.

## My Actions

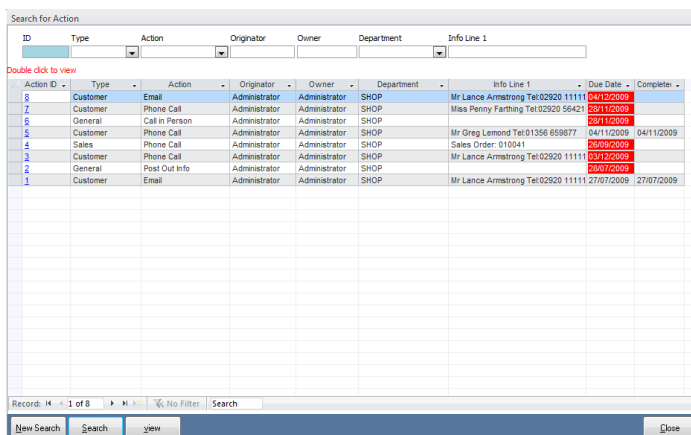


The 'My Actions' shows you all of your current actions. An action is a prompt/message which can be set up by yourself or by other users auctioning you to carry out a task. The due date will show in red if the task is overdue. This can be set up so that this will prompt the user on log in to remind them. You can action each other and the administrator can see all of the actions that need to be

undertaken by the users. This allows for the management to ensure that actions are completed and when they were set.

There is a drop down menu to view a specific category of actions, also a filter to filter by date.

## All Actions



This section simply looks the same as the 'my actions' section however it shows all of the actions within the system. This can be limited to the management team if you so wish. You can filter your search using the filters.

## Add General Action

**Add A Follow-up Action**

### General Action

Creation Date: 01/02/2013

Information Line 1:

Information Line 2:

Email Address:

Due Date / Time: 01/02/2013 Time: 12:00 Action Reminder: None before

To Be Actioned By:

Action Type:

Description:

This form allows the user to create the action. You can set a due date/time, who the action is to be sent to/Actioned by (This will show you all of the users in the system to select from), the type of action e.g. phone call, email etc. (Select from the drop down menu) and then the description box is for prompts or information on what is required of the actioner. This is where the CRM side of the system starts to build up as the actions will store on the system for your records against the relevant customer.

Once you have completed the action form simply click on 'Post Action' and then you will be asked whether you wish to email the user you are sending the action to or not.



## My Work To List

Work To List: Administrator - SHOP

Type	Quote	Sales Order	Works Order	Customer Name	Description	Excluding Status:	Department				
SO	010008			admin	22/04/2009	16/12/2008	1078	Sean Kelly			In Dispatch
SO	010013			admin	22/04/2009	14/01/2009	1057	Greg Lemond			In Dispatch
SO	010005			admin	22/04/2009	10/02/2009	1038	Alan Jones			In Dispatch
SO	010002			admin	18/02/2009	11/02/2009	1037	Lance Armstrong			In Dispatch
SO	010003			admin	04/03/2009	04/03/2009	1022	Lance Armstrong			In Dispatch
SO	010004			admin	04/03/2009	04/03/2009	1022	Lance Armstrong			In Dispatch
SO	010012			admin	22/04/2009	11/03/2009	1017	John Baker			In Dispatch
SO	010008			admin	22/04/2009	15/04/2009	992	Penny Farthing			Stock Allocated
SO	010014			admin	22/04/2009	15/04/2009	992	Alan Jones			In Dispatch
SO	010011			admin	22/04/2009	15/04/2009	992	Lance Armstrong			Stock Allocated
SO	010009			admin	22/04/2009	15/04/2009	992	Sean Kelly			In Dispatch
SO	010007			admin	22/04/2009	15/04/2009	992	John Baker			Stock Allocated
SO	010010			admin	22/04/2009	15/04/2009	992	Penny Farthing			Stock Allocated
SO	010015			admin	22/05/2009	22/05/2009	965	Lance Armstrong			In Dispatch
SO	010018			admin	10/11/2009	25/07/2009	920	Lance Armstrong			Order Not Alloca
SO	010020			admin	12/11/2009	26/07/2009	920	John Baker			In Dispatch
SO	010017			admin	01/08/2009	25/07/2009	920	Penny Farthing			In Dispatch
SO	010016-A			admin	25/07/2009	25/07/2009	920	Greg Lemond			Order Not Alloca
SO	010019-A			admin	25/07/2009	25/07/2009	920	Sean Kelly			Stock Allocated
SO	010025			admin	27/07/2009	27/07/2009	919	Kevin Desmier			In Dispatch
SO	010022			admin	27/07/2009	27/07/2009	919	Alan Jones			Order Not Alloca
SO	010023			admin	27/07/2009	27/07/2009	919	Lance Armstrong			Stock Allocated

Records: 14 | No Filter | Search | Show all including completed

New Search | Search | Print Preview | Close

Work to lists can be set up on the system to allow for a process of tasks to be undertaken before a process can be signed off.

For example when setting up a new sales order it can be set so that it must be signed off by a user within a certain department such as the credit control department. Therefore the sales order is produced but before it can be completed it will show up in the relevant users work too list and then you can go in and sign it off when the relevant checks have been made.

This is what you can see above it is the users 'work to list' of all of the quotes or sales orders that need to be checked and signed off.

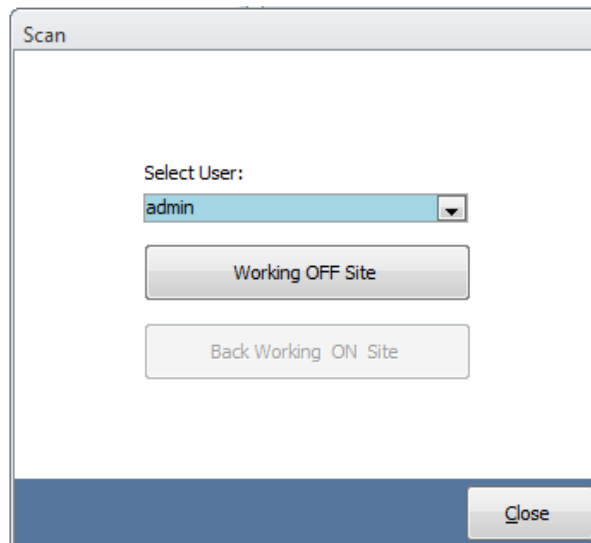
The box above shows you the work to list and the line will be red until it is complete and then it will change to green when completed.

The administrator can view the full work to list on the system and can use this to see what tasks are outstanding as a management tool.

Along the top are the relevant filter boxes in order for you to easily narrow down the search.



## Working On/Off Site

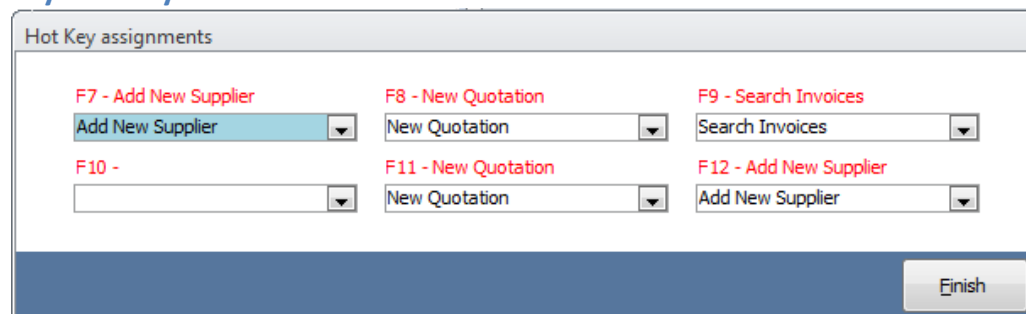


The 'Scan' dialog box contains the following elements:

- A 'Select User:' label above a dropdown menu showing 'admin'.
- A 'Working OFF Site' button.
- A 'Back Working ON Site' button.
- A 'Close' button at the bottom right.

This simply allows you to select whether you are working on or off site and is part of the Human Resource section of the system. This is then recorded within the system and can alert other members that you are working on or off site.

## My Hot keys



The 'Hot Key assignments' dialog box contains the following elements:

F7 - Add New Supplier Add New Supplier	F8 - New Quotation New Quotation	F9 - Search Invoices Search Invoices
F10 - [Empty]	F11 - New Quotation New Quotation	F12 - Add New Supplier Add New Supplier

An 'Finish' button is located at the bottom right.

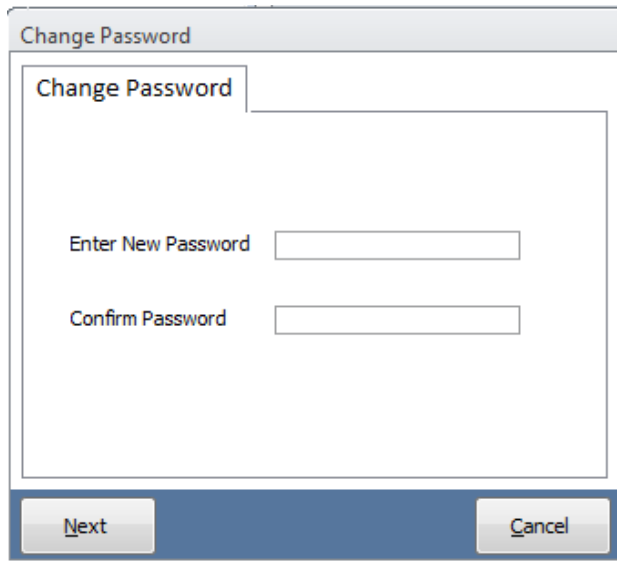
The 'My Hot Keys' set up is a usability tool for the user. You will see on the ribbon on the software that there is a series of F Key buttons that will be blank.

You may find that as a user carrying out a series of similar tasks depending on your job role that you are using the same parts of the software on a regular basis. Therefore you can configure some hot keys as shown above.

For Example: If you are in a sales role you may wish to have the 'New Quote', 'New Sales Order' and 'Add New Customer' on your hot keys so that you can just press the relevant key to start this process instead of going into your tree menu.

Once you have set this up you will see your selected options show up on the ribbon of the software and you can either click these manually or press the relevant 'F' key on your keyboard.

## Change Password



The image shows a 'Change Password' dialog box. It has a title bar with the text 'Change Password'. Inside the dialog, there is a sub-header 'Change Password' followed by a large empty rectangular area. Below this area are two input fields: 'Enter New Password' and 'Confirm Password'. At the bottom of the dialog, there are two buttons: 'Next' and 'Cancel'.

This simply allows you to change your user password for access into the i2i software, as shown you must confirm the new password in order for this to take effect. This will take affect from your next log in to the software.