



Attaché 7 Features Overview

Attaché 7 Look and Feel

Integrating with your other Windows applications

The Attaché 7 interface adopts many Windows® characteristics making it look like your other software applications. New display elements include the Windows-style menu bar, checkboxes, windows, borders, fonts and icons.

New File, Window and Help menus

The new-look menu bar in Attaché 7 includes the new File, Window and Help menus.

Accessing functions via the new File menu

The new File menu gives you one-click access to functions such as Sign On and Exit, user and company set ups and preferences, Archive and KFI. Plus you now change company and change user via the File menu. The File menu is always available but the options displayed can be controlled via menu access rights.

Changing company without exiting Attaché

Using the new File menu you can change company without having to sign on again. To change company choose Open Company on the File menu.

Creating a new company without exiting Attaché

Using the new File menu you can create a new company without having to quit and sign back on. To create a new company choose New Company on the File menu.

Closing a company without exiting Attaché

Using the new File menu you can close a company without having to exit Attaché. To close a company choose Close Company on the File menu.

Attaché 7 Sign On

The new-look Attaché 7 Sign On lets you sign on as you did previously and also provides the option to sign on without opening a company so you can do company and user maintenance. In addition you can now set up a default company for selection at Sign On.

Multi-tasking with the new Window menu

The new Window menu in Attaché 7 lets you more easily work with many tasks at the same time. Using the Window menu you can quickly and easily view all open tasks, select a task and close a task. You can also arrange your open task windows by choosing to "tile" or "cascade" them.

The Attaché Task List

The Attaché Task List, which lists all open tasks, was previously available from the status bar at the bottom of the Attaché window. The Task List is now accessed from the new Window menu.

Accessing Attaché 7 Help

The new Help menu provides easier access to Attaché 7 Help information while you work. The Help menu also lets you access the new About Attaché 7 screen.

Accessing information about your version of Attaché 7

The About Attaché 7 option on the new Help menu provides information about your current version of Attaché 7, your licensed modules and provides links to the Attaché websites.

Choice of menu style: tab, tree and drop-down menus

Each user can choose the menu style that they prefer. Attaché 7 includes the familiar Business Partner "tab style" and Catapult "tree style" menus as well as the new Windows style drop-down menu. To select your menu style choose User Preferences on the new File menu. (The default setting for new users is the new drop-down menu.)

New-look screens

Task screens in Attaché 7 have been given a cleaner, more modern look. In addition you can choose to use large fonts, large icons, and whether to display traditional function buttons or new toolbars.

Choice of toolbars or function buttons on task screens

Each user can choose whether to display traditional function buttons or new toolbars on task screens. Function buttons can be displayed with text only or with icons, and toolbars can have regular- or large-size icons. Toolbars include additional icons for edit functions such as Cut and Paste, Standard Messages and KFI. To select your task screen options choose User Preferences on the new File menu. (The default setting for new users is the new toolbar option.)

Resizing windows and screens in Attaché 7

Attaché 7 adopts a more standard Windows approach to resizing windows. You can resize Attaché 7 windows by dragging their borders, and they can be maximised and

minimised. By pressing the Shift key as you drag a screen border you can also scale the contents of a screen. To scale and maximise the screen, click the maximise button while holding the Shift key.

Setting your display preferences

In Attaché 7 each user can choose various display settings for their task screens. Choices include menu style, font and icon size, and whether to use traditional function buttons or new toolbars. To set up your display options choose User Preferences on the new File menu.

Menu changes for former Attaché Catapult users

Various Catapult menus have been rearranged and renamed in Attaché 7.

Managing Users and Companies

Setting up and deleting users

The Set Up and Delete Users option is now available on the new File menu. (Previously it was an option on the Sign On screen).

Setting up a default company for sign on

Previously each time you signed on, the software defaulted to the last company you were working in. You can now establish a Default Company which is always available under the new Sign On option *Work with my usual company*. To set up a default company for a user choose **Set Up and Delete Users** on the new File menu.

Setting user display options

Choice of Menu Style and Toolbar Appearance are new display options in Attaché 7. Supervisors can set these display options for each user through **Set Up and Delete Users** on the new File menu. (Users can also set their own display options through **User Preferences** on the File menu.)

Setting up default menu access rights

Previously, each time you created a new company you had to modify each user's menu access rights. Now you can set up default access rights to determine what rights each user has to newly created companies. This is done when you create or modify a user through Set Up and Delete Users on the File menu.

Copy user options between users and companies

Your saved report options and selections can now be copied between users and between companies. This means you no longer have to save options each time a new company or user is created. To copy saved options choose **Tools | Company | System | Copy User Options**.

Setting up default user report options

You can now create a set of default report options and selections which can be copied to any new or existing company.

Setting up and deleting companies

In Attaché 7, Set Up and Delete Companies is located on the new File menu. As well as setting up or deleting a company, the Set Up and Delete Companies screen also allows you to temporarily or permanently block or restrict access to companies.

Setting up different company backgrounds

In Attaché 7 you can have different backgrounds for different companies so that it's easy to identify one company from another. Attaché 7 includes a number of backgrounds to choose from or you can supply your own. Company backgrounds are set up via Company Options on the Setups menu.

Blocking and disabling companies

You can now temporarily or permanently block access to companies and disable editing in companies. You can also type a message to be displayed when a user attempts to open or edit a blocked or disabled company to let them know, for example, why the company is blocked and when it will be available again. To block or disable editing in a company choose Set Up and Delete Companies on the new File menu.

Preventing access to companies

You can now determine which companies are accessible to each user. Making a company unavailable to a user means it will not be displayed on the companies list when they sign

on and when they choose Open Company from the new File Menu.

Using Notes in companies

Set Up and Delete Companies (under the new File menu), allows you to quickly and easily record comments and

annotations for a company, using the company notes feature. For example, use notes to keep track of major system events or milestones, such as the creation date of the company, the dates of any significant reviews and any key system events (for example, backup dates and file locations).

Managing Masterfiles

Optional confirmation when creating new masterfiles

You can now set up each Attaché module to display a confirmation message whenever a user creates a new masterfile. This new function helps to prevent users from accidentally creating new masterfiles. To turn on Confirm Masterfile Additions, go to the Options screen in Setups for each module.

User-defined fields in masterfiles

Each masterfile now includes 15 fields that you can name and use for your own needs. The information you store in these fields is then available in masterfile enquiry and can be exported to other applications by using Attaché ODBC.

Changing masterfile codes

A new option under the Tools menu allows you to change customer, supplier and product/service masterfile codes. Any change in code updates all related details and transaction files.

New contact fields in customer, supplier and employee masterfiles

You can now store an email address in each customer, supplier and employee masterfile. In addition, a Fax Number field has been added to employee masterfiles. You can also choose these delivery details instead of those

stored in the Document Delivery Address Manager when sending emails via Attaché Alex.

Editing Notes in masterfile enquiry

With Attaché 7 you can access the Notes option when in masterfile enquiry, although this can be restricted by password level. To turn on Edit Notes in Enquiry, go to the Options screen in Setups for each module.

Managing inactive product masterfiles

In Attaché 7 you can mark product masterfiles as inactive. You can delete transactions for inactive masterfiles in period end and delete inactive masterfiles in special maintenance. Inactive products can be reported upon separately and can be excluded from most masterfile reports.

Removal of Customers, Suppliers and Products Old Maintenance

The Customer, Supplier and Product Maintenance and Enquiry screens were reorganised and split between two screens in version 1.25.000 (November 2003), in order to accommodate important new fields. The Old Maintenance menu continued to be available to allow time for you to create new Keystroke File Import (KFI) files. This menu has now been removed in Attaché 7

Managing Transactions

Multiple incidences of task screens

In Attaché 7 you can open multiple instances of the same task at the same time. This allows you to have, for example, more than one invoice open for editing. You can move between tasks using either Control+Tab or via the new Window menu. Supervisors can disable this feature in Set Up and Delete Users on the new File menu.

User defined data-entry and lookup screens

Each user can now have their own data-entry and lookup screens for each transaction type in Customers and Suppliers. This means you can create screens where the user sees only the fields they need. Access to user-defined screens can be password protected.

Creating multiple transaction entry screens

In Screen Designer you can now create multiple customised layouts for each transaction type in Customers and Suppliers. This allows each user to then select the transaction entry screen which best suits their workflows.

Generating orders and invoices from standing orders

You can now automatically or manually create orders and automatically create invoices from standing orders. You can select ranges and enter additional parameters such as Combine Orders and Print Invoices Now. The software can also print an exception report that notes any errors or omissions that occur.

Generating orders and invoices from quotations

You can now automatically or manually create orders and automatically create invoices from quotations. You can select ranges of quotations and enter additional parameters

such as *Combine Quotes* and *Print Order Confirmations*. The software can also print an exception report that notes any errors or omissions that occur.

Managing Information

Drill down to masterfiles and documents

The new "drill-down" feature in Attaché 7 lets you quickly access information. In Customers, Suppliers, Products/Services, you can drill down to source documents from masterfile enquiry and to masterfiles from document lookup, and to transaction lists from summary fields in masterfile enquiry. Drill-down fields are indicated by a red corner.

Printing and sending documents from transaction lookup

In Attaché 7 you can send customer and supplier documents directly to print, fax or email from the transaction lookup screen. You can also mark documents as printed, choose a special form code and add inclusions if sending by email or fax.

Printing transaction lists from masterfile enquiry

You can now print lists of transactions from masterfile enquiry. You can choose the date order that the information is reported and whether to send the information to the printer, screen or file.

New productivity tool: Attaché ExpressLink

The new Attaché ExpressLink productivity tool lets you open, save and send Attaché reports in different formats and different programs. For example, you can choose to open an Attaché 7 report in MS Word or MS Excel, email it, or save it in HTML or CSV format. You can also print reports directly from the Print Preview screen.

Attaché Payroll

New Payment Summary layout for Australian Payroll

Two new mandatory payment summary layouts have been added to Attaché Payroll. These payment summaries should be used for any new payment summaries issued after 1 July 2006. Attaché Payroll retains the old payment summary layouts only for reprinting purposes.

Workplace Giving for Australian Payroll

In line with Australian Taxation Office (ATO) requirements, a new checkbox is now available in employee deductions to allow Workplace Giving deductions to be separately identified.

Attaché Alex

Installing and testing AlexConnect

Attaché 7 includes a special utility designed to get you up and running quickly with the Attaché Alex document delivery service. The utility tests whether your system is ready for AlexConnect (the software component of Attaché Alex) by sending a test fax to you. If your system isn't ready for Alex, the utility can help you to diagnose

the reason why and assist you to send an email to Alex Support.

Default delivery details in Document Delivery Address Managers

The new default type in the Document Delivery Address Manager delivers all external business document types

Software licensing

Licensing from the menu

In Attaché 7 you can update your licence details directly from the menu, without having to reinstall your software. You can add log-ins and activate newly acquired tools or

modules, using licence files forwarded to you by email or downloaded from the internet. To update your licence details choose Tools | Company | System | Update Licence.