Fresa Technologies

Neutral IT Solution Provider

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FREQUENTLY ASKED QUESTIONS

USER MANUAL

FOR FRESA GOLD CUSTOMERS

Prepared By : **FRESA TECHNOLOGIES**

Proprietary & Confidential

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FRESA GOLD

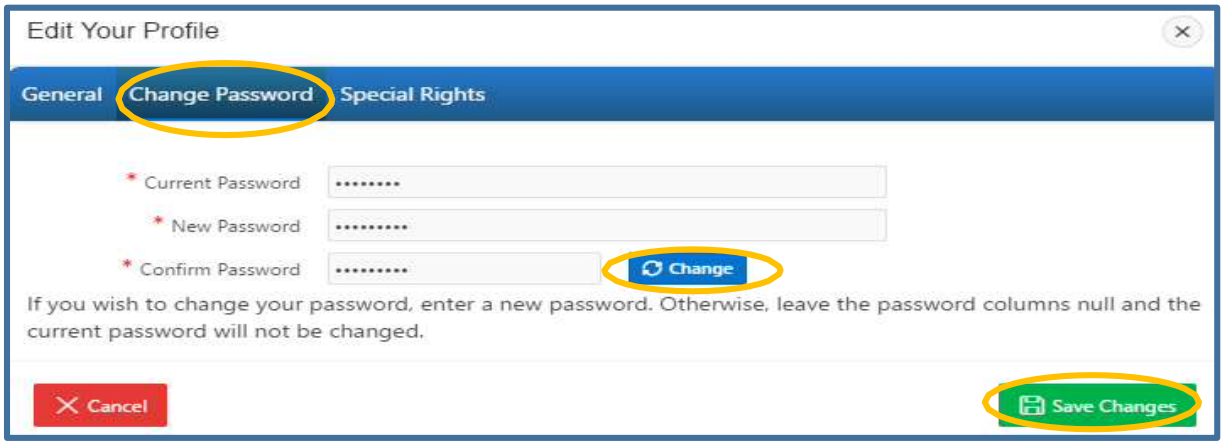
About Fresa Technologies

Fresa Technologies Pvt Ltd is an independent, neutral and professional software company that provides IT and IT-enabled services with a focus on providing solutions only to Freight forwarding and shipping industries. Fresa Technologies also focus on developing cost-effective and efficient Freight Forwarding Software Applications with a user-friendly interface and back office solutions. We also focuses on infrastructure and hardware support such as developing & maintaining websites and Mail Services. Our team comprises of highly skilled individuals, who are experienced architects in designing & developing Freight forwarding & logistics software for over 15 years. We are domain experts and specialize in providing customized, user friendly and cost effective solutions. We focus on enhancing user experience and satisfaction for a sustainable relationship.

FREQUENTLY ASKED QUESTIONS

FAQ 1. How to Change User Password?

- To Change User Logon Password, under the *Menu Bar Icons* available the top right corner of the *Home Page Screen*, icon is available.
- The username will be displayed beside icon.
- Clicking icon will open *Your Profile Page Screen*.
- Clicking Edit Profile icon available in the top right corner of *Your Profile Page Screen* will open *Edit Your Profile - Pop up Window*.
- Under *Change Password Tab*, enter Current Password, New Password and Confirm Password details and click Change icon followed by Save Changes icon.



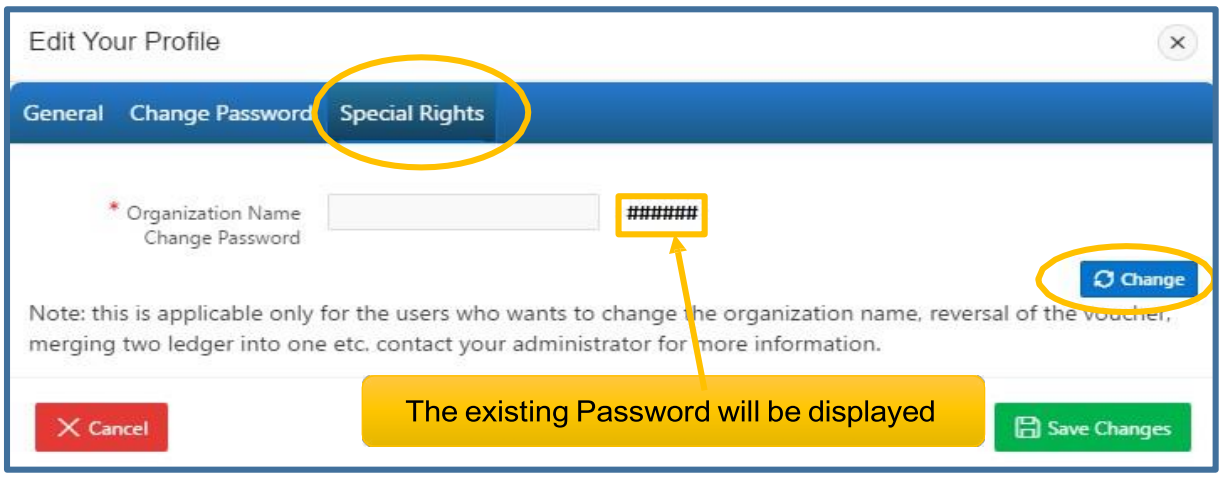
Change Password Tab_Edit Your Profile_Pop up Window

- User password can be successfully changed.

FAQ 2. How to Change Special Rights Password?

Remember: Special Rights Password is applicable only for the users who wants to change the organization name, reversal of the voucher, merging two ledger into one, so on.

- Special Rights password can be changed as explained similar to FAQ 1.
- Select *Special Rights Tab* under *Edit Your Profile-Pop up Window*.
- The existing password will be displayed beside the field box.
- Enter the new password in the given field box and click Change icon followed by Save Changes icon.



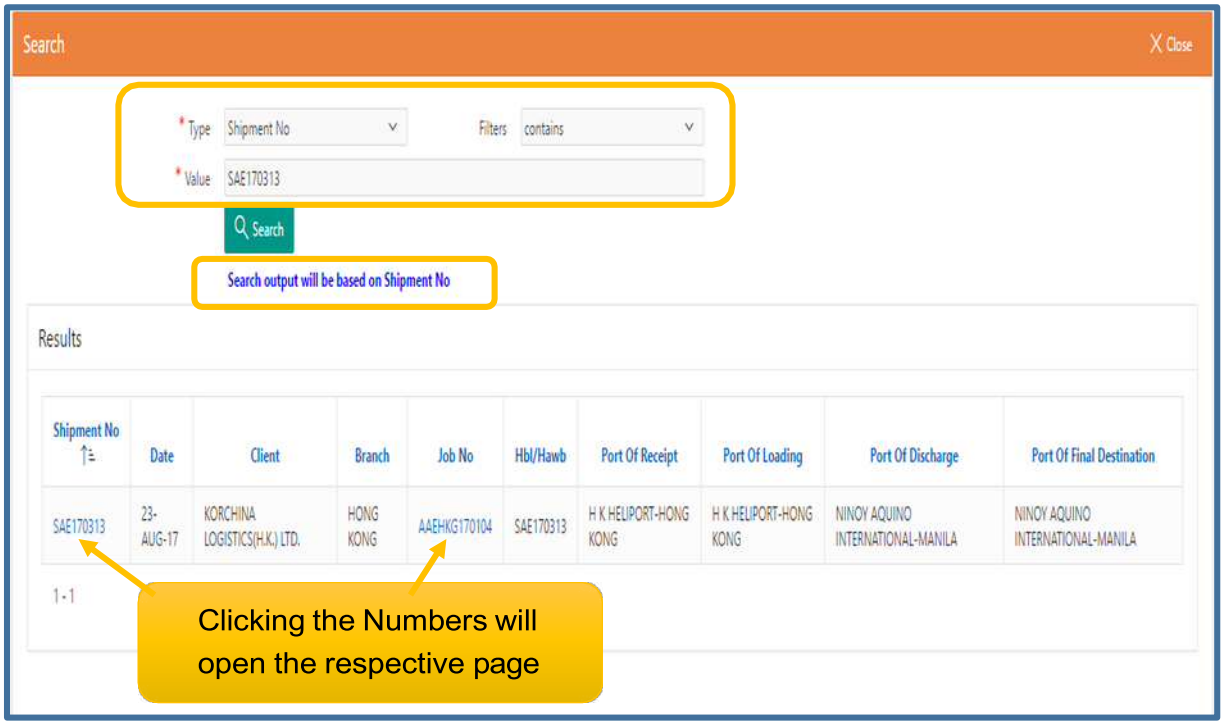
Change Password Tab_Edit Your Profile_Pop up Window

- Special Rights password can be successfully changed.

FAQ 3. What is use of Search Icon in Home Page?

Search Icon available in the *Menu Bar Icons* is useful for the user to fetch the Shipment and Job details according to the Search *Type* selected. This icon is for easy navigation to any specified page in the website.

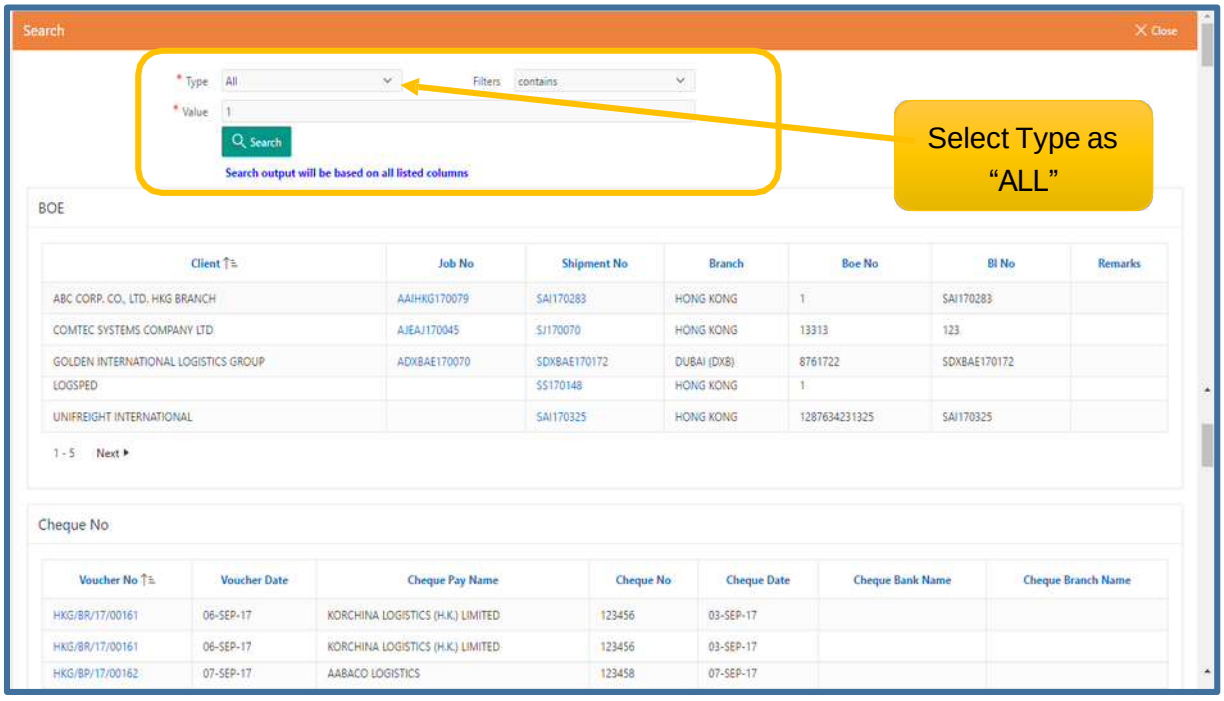
- Clicking Search icon available in the *Menu Bar Icons* of the *Home Page Screen* will open *Search Screen Page* in new tab.
- *Type* drop down list provides options such as Job No, Shipment No, MAWB No, House Bill No, Voucher No, Shipping Bill No, etc.
- *Filters* drop down list provides options such as equals, does not equal, begin with, does not begin with, end with, does not end with, contains and does not contains.
- *Value* field box is available to enter the known value according to the search *Type* selected.
  - For Instance: select *Type* as *Shipment No* and *Filters* as *contains* and in the *Value* field box enter the Shipment Number Value. Click Search icon.
  - The output results will be displayed based on the Shipment Number value entered.
  - Clicking the displayed Shipment number or Job number, the respective page gets opened to view and edit the details.



Search Screen Page

FAQ 4. How to Search All Details in a single page based on the desired value entered?

- Search Icon available in the *Menu Bar Icons* of the *Home Page Screen* will open *Search Screen Page* as explained similar to FAQ 1.



Search Screen Page

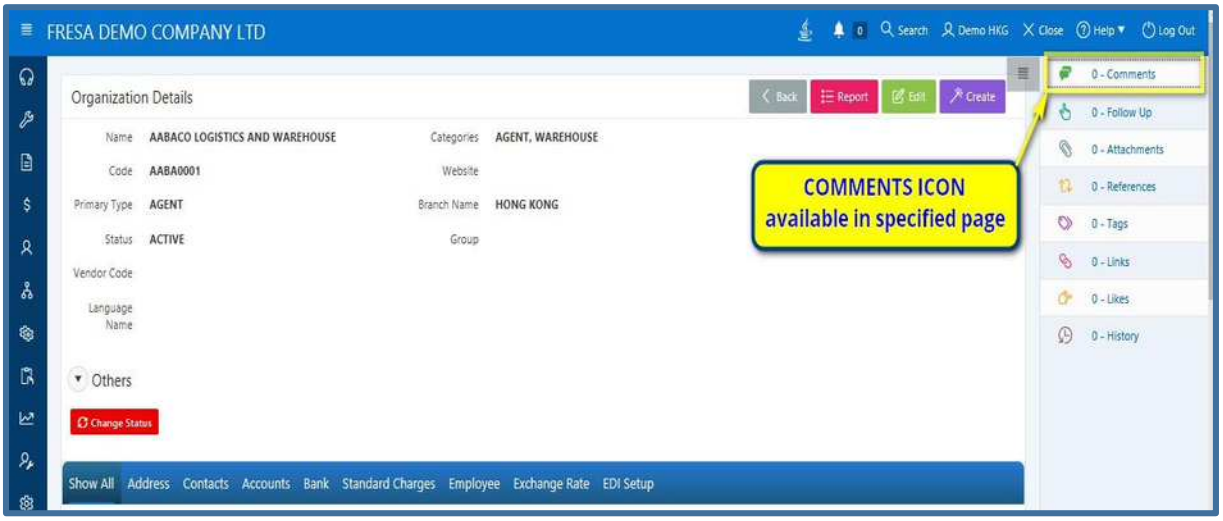
- Select *Type* as All and any *Filters* options and in the *Value* field box enter the value to be searched and click Search icon.
- The system will search the entire module based on the value entered and the output results will be fetched and displayed in the single page.

FAQ 5. How to log out from the Fresa Gold Website?

- Log Out Icon available in the *Menu Bar Icons* of the *Home Page Screen* will help the user to log out from the *Fresa Gold Website*.

FAQ 6. How to comment on a specific page?

- On a Specified page, right hand side corner of the page provides various added options, where 0 - Comments Icon option is available to post the comments for that page.



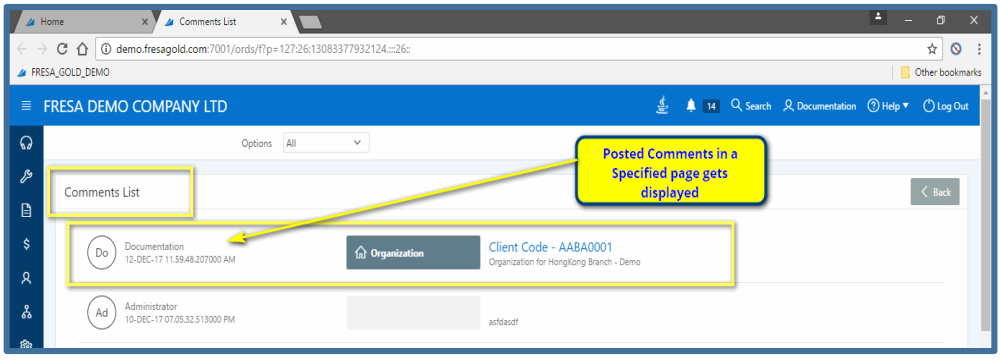
- Clicking 0 - Comments icon, opens Comments Pop up Window.

- Enter the comments for that page as shown below and click icon.

- Now the comments posted successfully and comments gets displays in the pop up window as shown below:

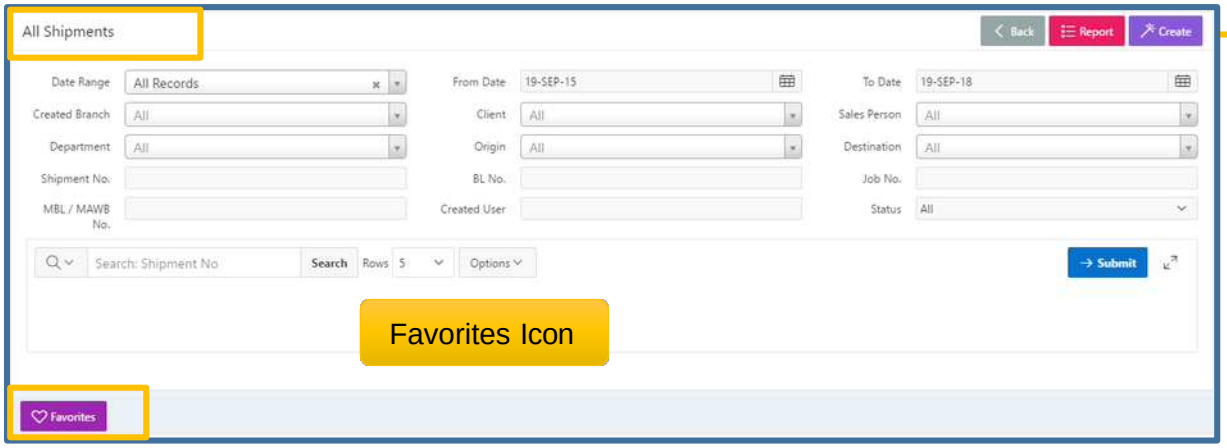
- The posted comments can be viewed by using Comments icon in Home Page screen.

- Clicking the Comments icon will open Comments List Page where the posted comments gets displayed.



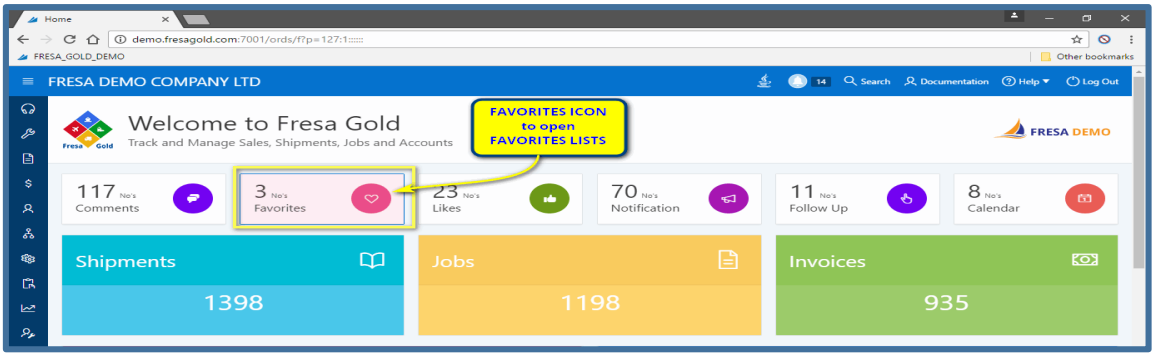
FAQ 7. How to add a specified page to Favorites?

- In some specific page in the website, Favorites Icon is available in the bottom left corner of the page.
- Clicking Favorites icon will add that specified page to the *Favorites List* which is reflected in the *Favorites Icon* in the *Home Page Screen*.
- **For Instance:** The User can add *All Shipments Page* to the *Favorites List* by clicking Favorites Icon.

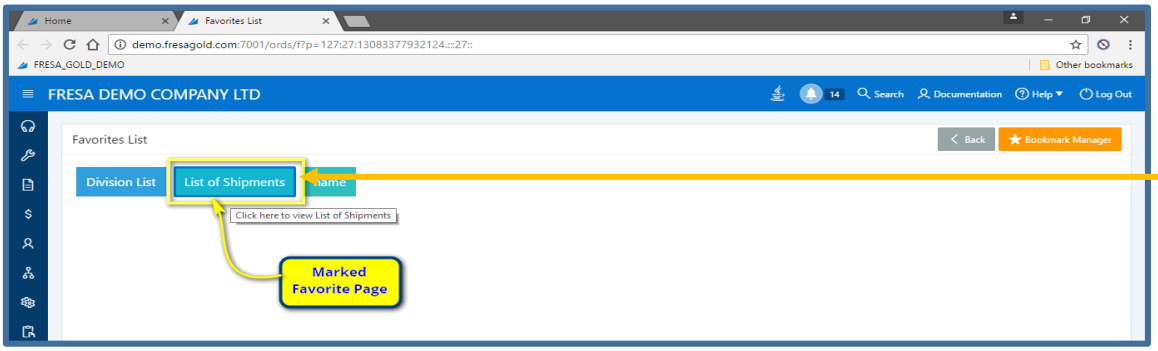


All Shipments Page

- Clicking *Favorites Icon* available in the *Home Page Screen* will open *Favorites List Page*.

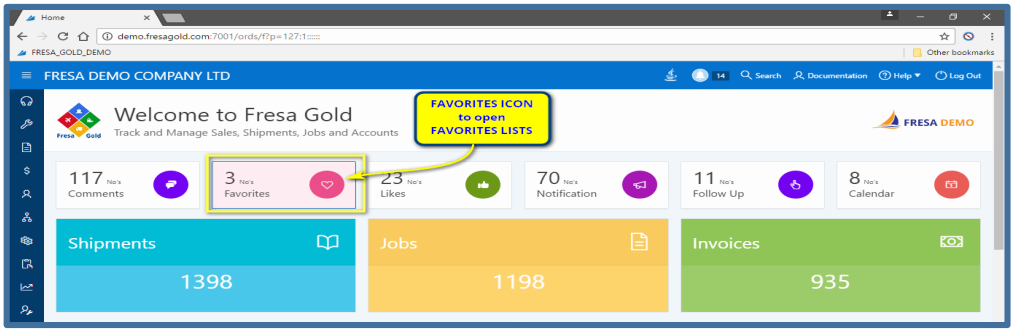


- Now *All Shipments Page* is marked as a favorite and will be listed in the Favorites list. Clicking the link will direct the user to the specified *All Shipments Page*.

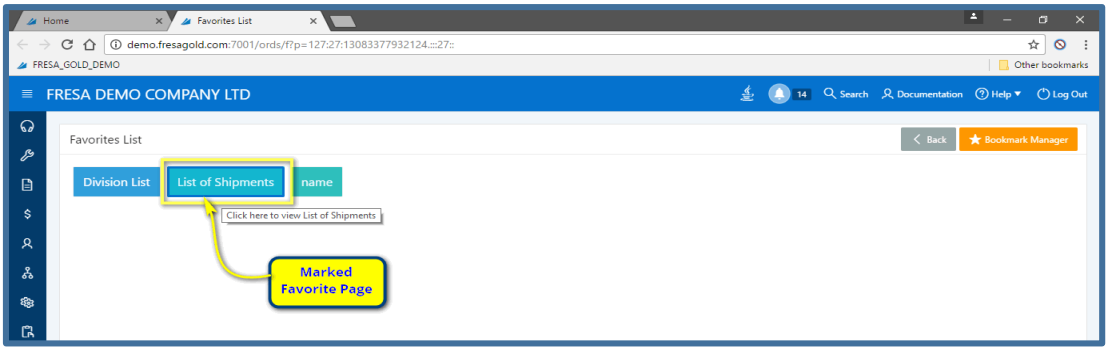


FAQ 8. How to remove a page from favorites?

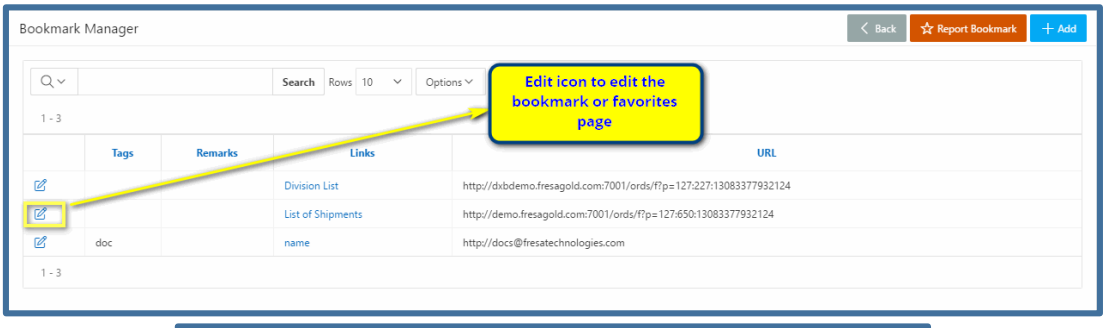
- Clicking *Favorites Icon* available in the *Home Page Screen* will open *Favorites List Page*.



- Now *All Shipments Page* is marked as Favorite and will be listed in the Favorites list. To remove this Favorite Page, click Bookmark Manager icon.



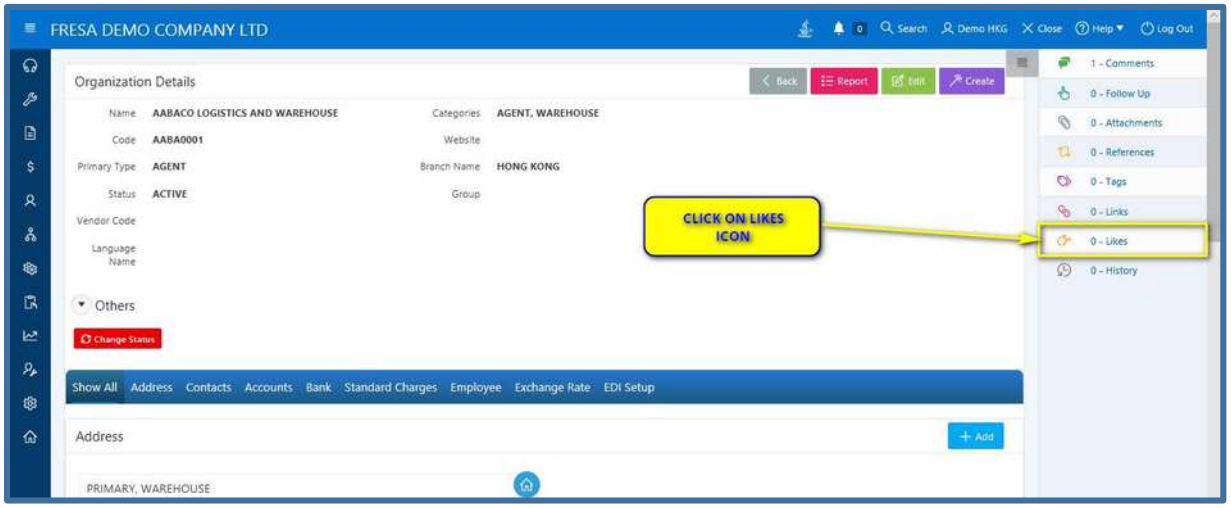
- Bookmark Manager Page opens where click icon besides the specified page and Bookmark Edit Pop up Window opens and click Delete icon to remove that specified page from Favorites.



FAQ 9. How to Like a specified page and view the particular liked page?

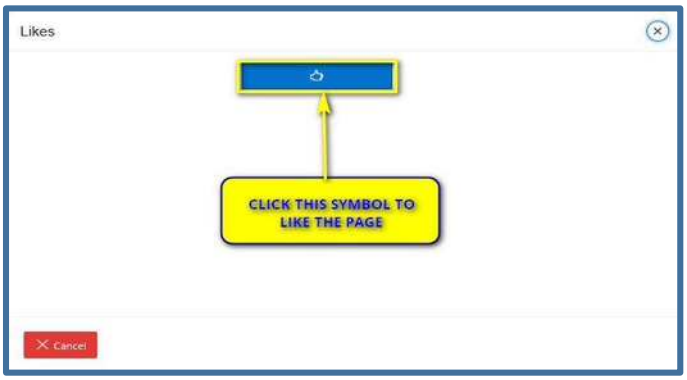
- On a specified page, right hand side corner of the page provides various added options, where

Icon option is available to like that page and add to the Liked page lists.

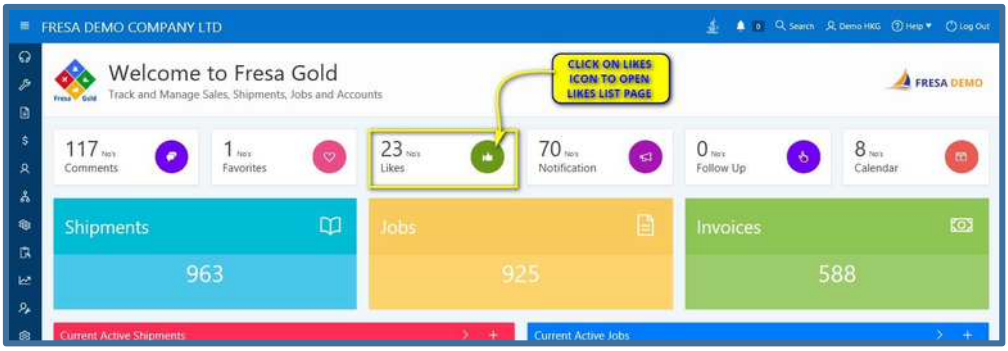


- Clicking

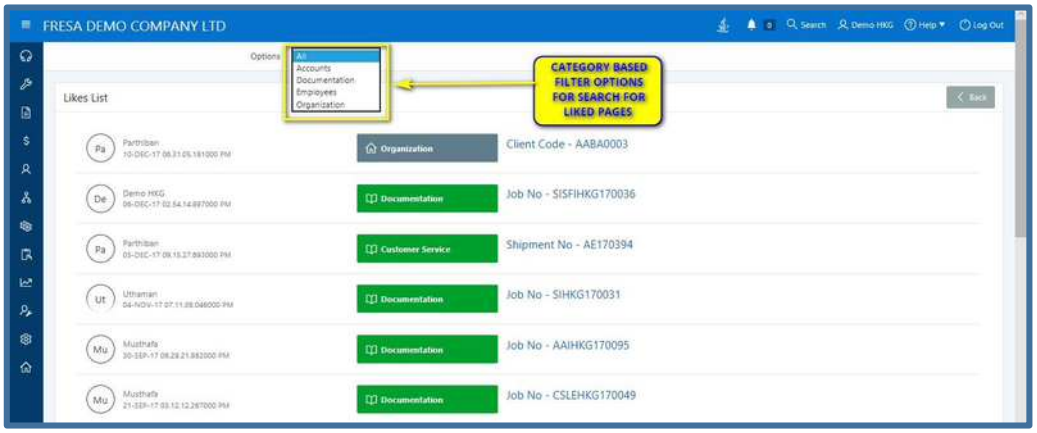
icon, opens Likes Pop up Window. Click on icon to like the page.



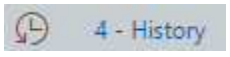
- To view the pages that are liked, click on Likes Icon in Home Page Screen.

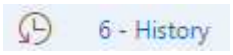


- Likes List Page Screen opens and liked page are displayed and filter options are available to categorize the liked page as shown below:

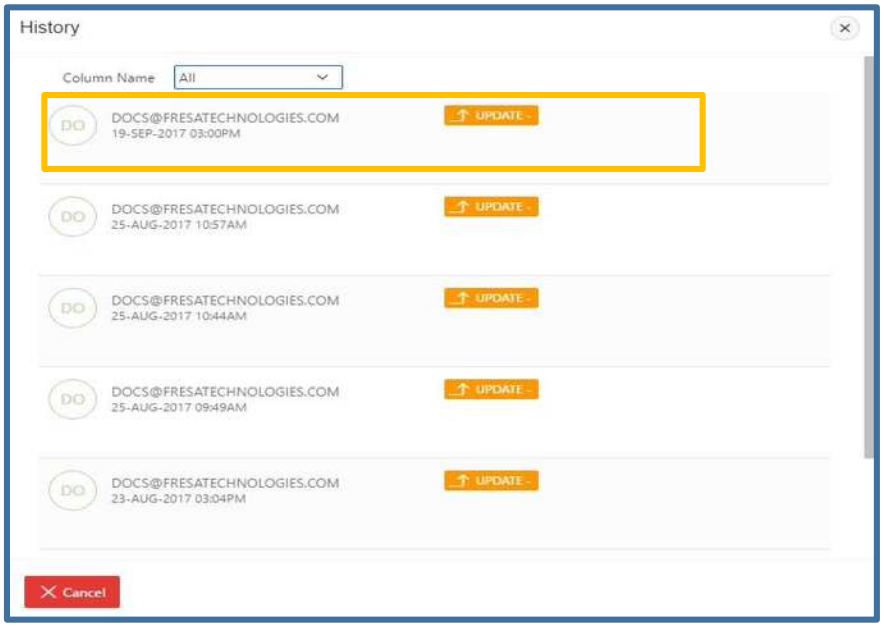


FAQ 10. Is it possible to view the history of update or insert for specific page?

- Yes, it is possible to view the history of update or insert to the fields for specific page such as *Shipment Details Page*, *Job Details Page*, etc.
- After the updating the details in the specific page, the notification number in the 

icon available in the top right corner of the specified page gets incremented.
- By clicking 

icon will open *History-Pop up Window*.



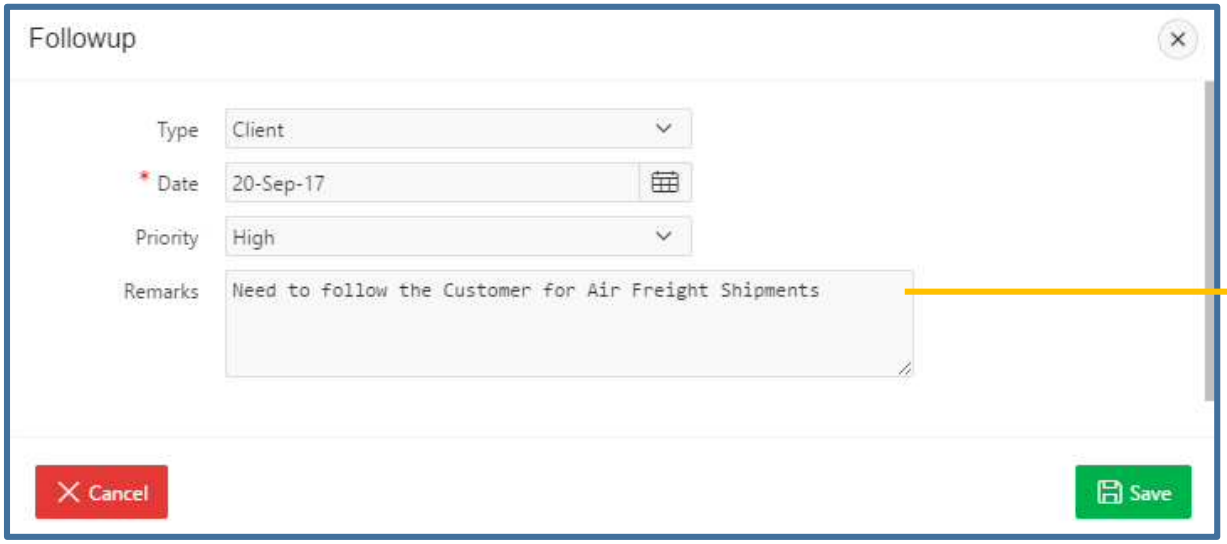
History-Pop up Window

- All the recent action to the specified page such as insert or update or delete are displayed in the *History-Pop up Window* with the username, date and time.

FAQ 11. How to set Follow Up for specific page?

- To set Follow Up for specified page,

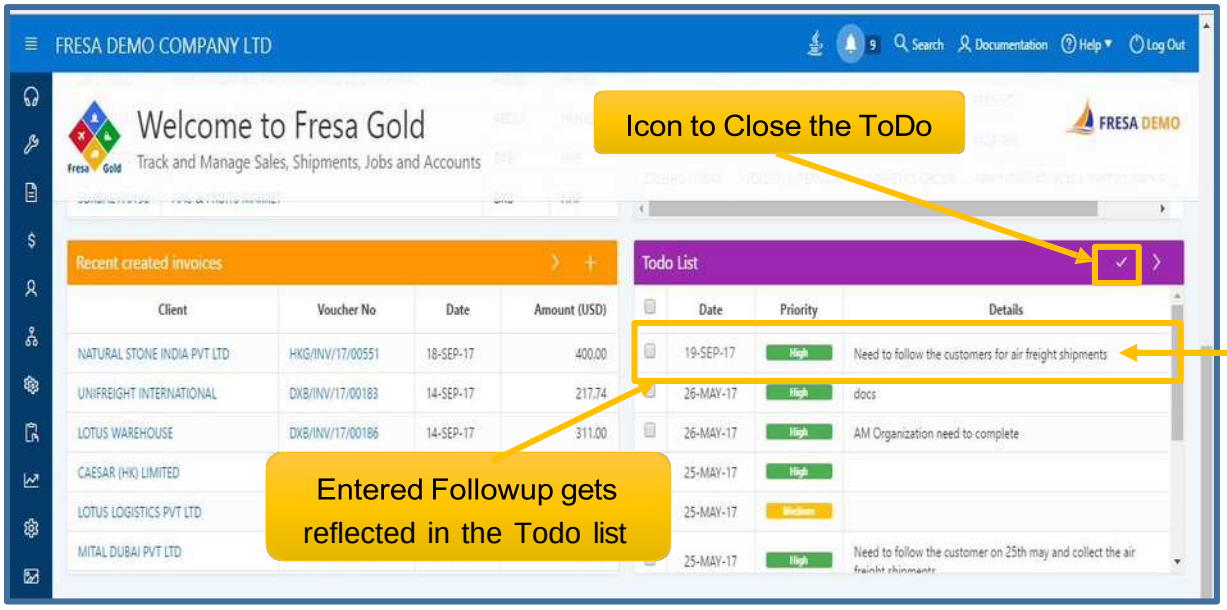
Icon is available in the top right corner of the specific details page.
- Clicking the icon will open *Follow Up-Pop up Window*.



Followup-Pop up Window

- Enter the details and set the *Priority* and click

icon. The Followup is set.
- This Followup get reflected in the *ToDo List* of the dashboard informations in *Home Page screen.*

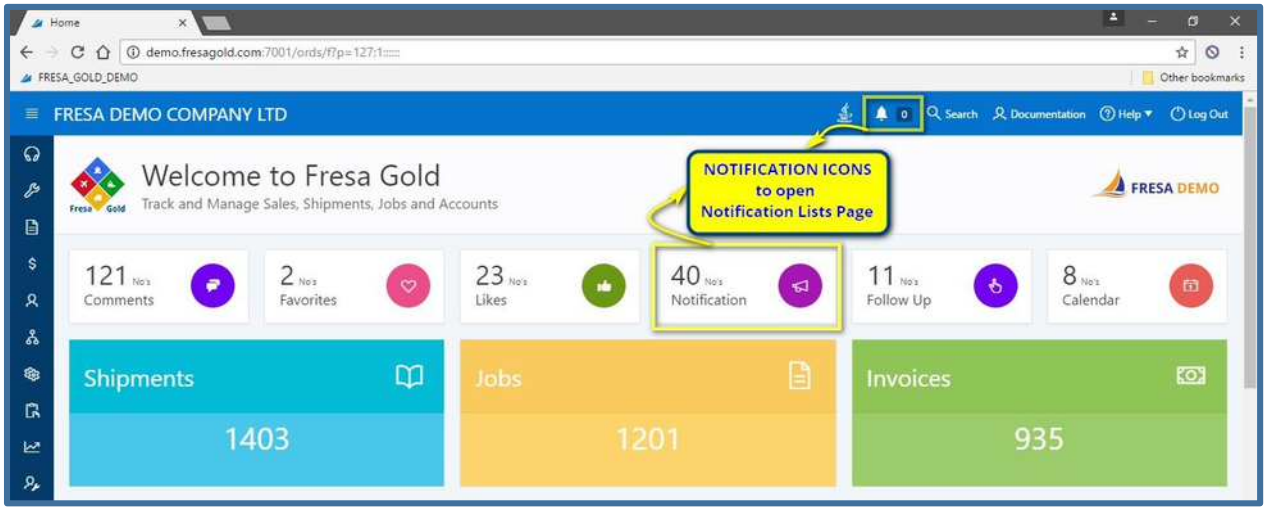


Todo List_Home Page Screen

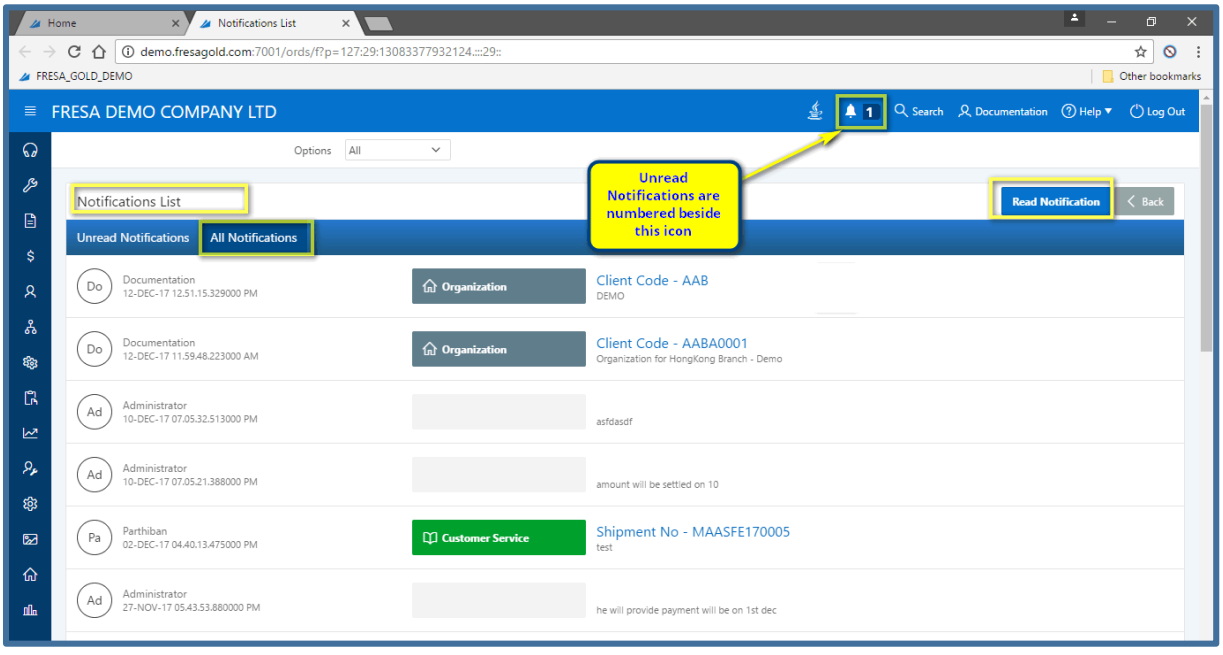
- *Icon is used to close the To Do.*

FAQ 12. What is the purpose of Notification Icon in Home Page Screen?

- The Notification Icons which is available in Home Page screen as shown:

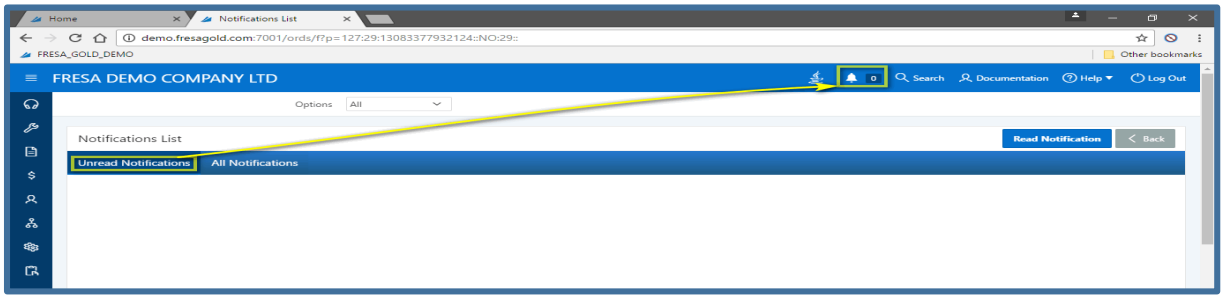


- Clicking Notification Icon will open the Notification List page where are the comments and follow up saved on the specified pages gets displayed.



- When the listed notifications are not read, then unread notifications are numbered and gets displayed besides the Notification Icon as shown above.
- **Read Notification** icon can be used to read the notifications. Clicking this icon will show the success pop up message as shown

- After read all the notifications the changes in the numbering besides the notification icon occurs and gets displayed as shown:

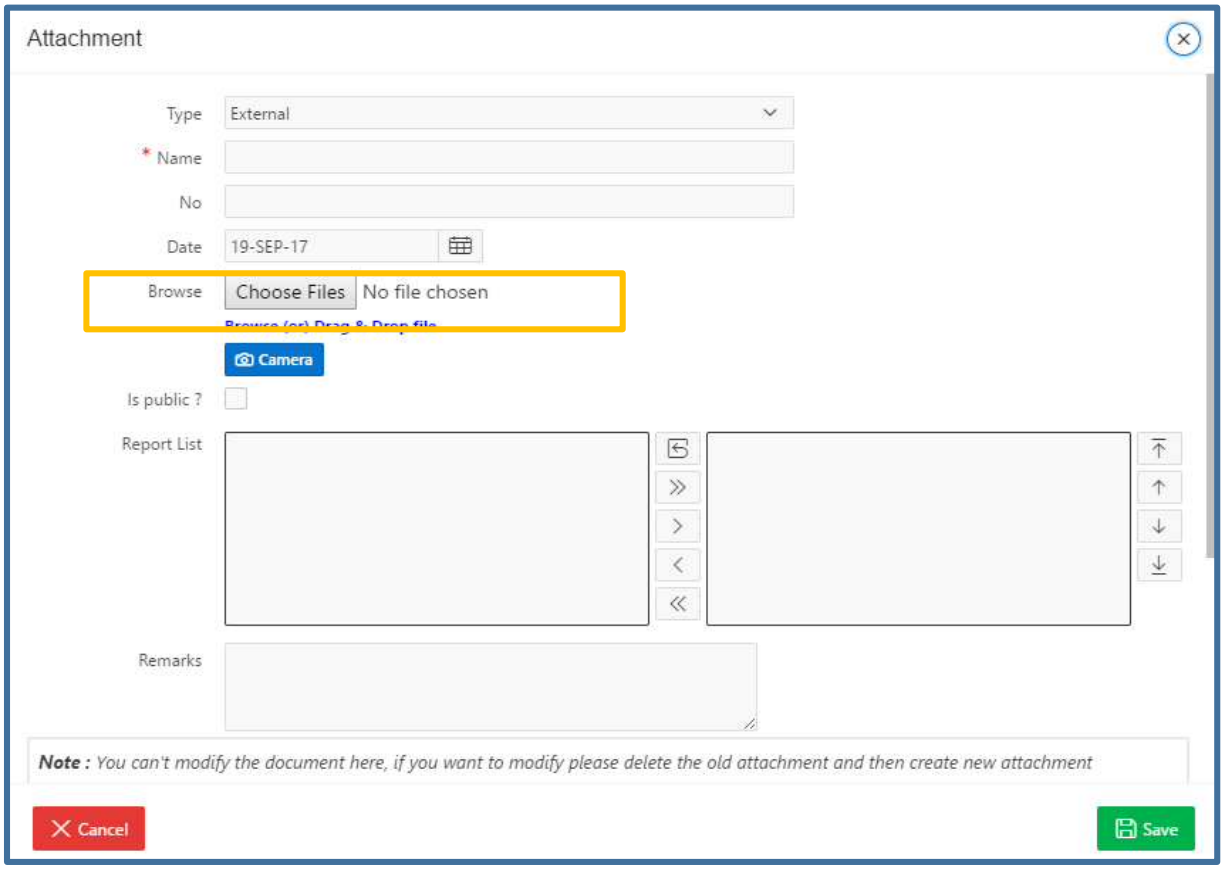


FAQ 13. Can I attach documents for specific page?

- Yes, it is possible to attach documents in the specific page such as *Shipment Details Page*, *Job Details Page*, etc.
- To attach documents for specified page,

Icon is available in the top right corner of the specific details page.
- Clicking

icon will open *Attachment-Pop up Window*.

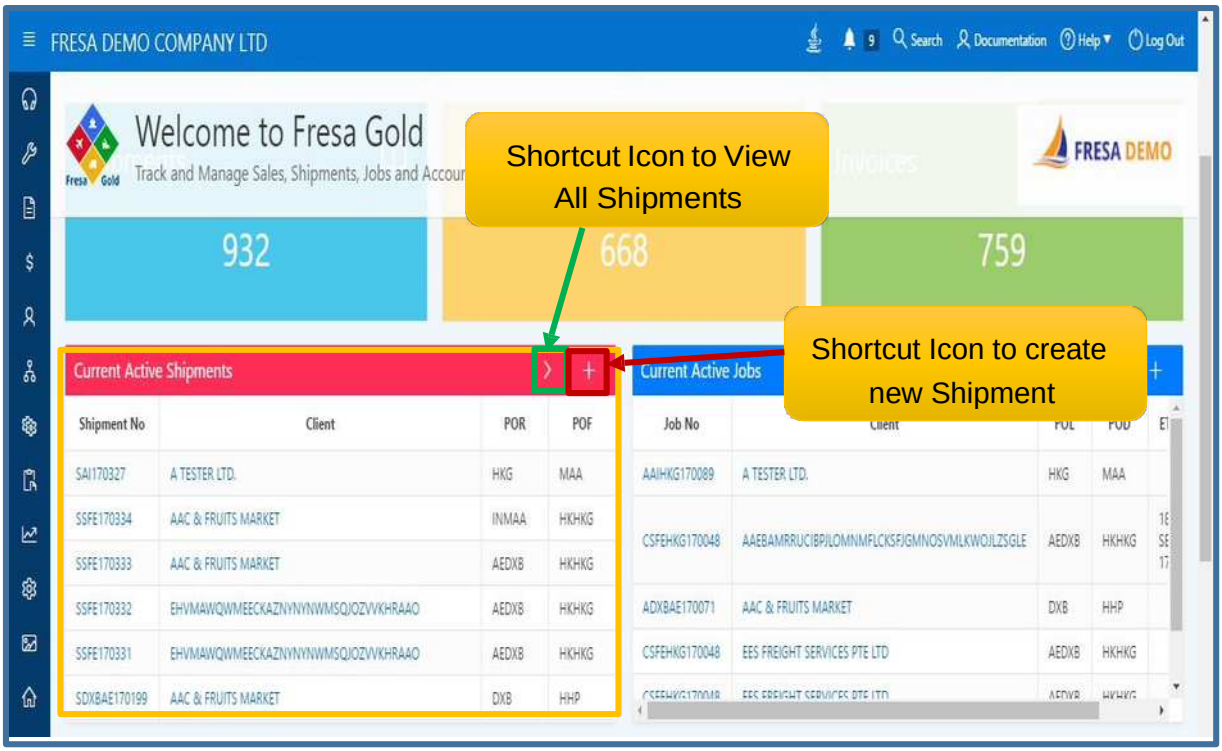


Attachment-Pop up Window

- Select *Type* as *External* or *Internal* and enter the relevant details.
- The User can check or uncheck the checkbox '*Is Public?' to* set the attached file is for public view or not.
- Upload the attachment file and click Save icon. The file gets attached.

FAQ 14. How to view all current Active Shipments?

- All current active shipments can be viewed in the *Current Active Shipments Window* of the dashboard informations in *Home Page screen*.

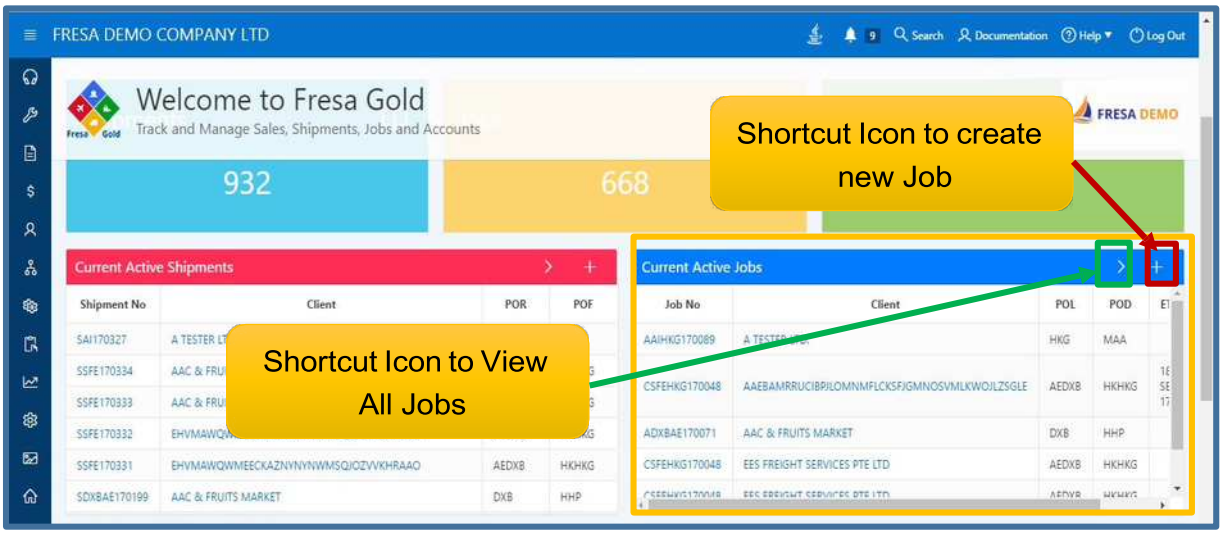


Current Active Shipments Window_Home Page Screen

- > shortcut icon is available to redirect the system to the *All Shipments Page Screen*.
- \+ shortcut icon is available to redirect the system to the *Create Shipment Page Screen* to create New Shipments.

FAQ 15. How to view all current Active Jobs?

- All current active Jobs can be viewed in the *Current Active Jobs Window* of the dashboard informations in *Home Page screen*.

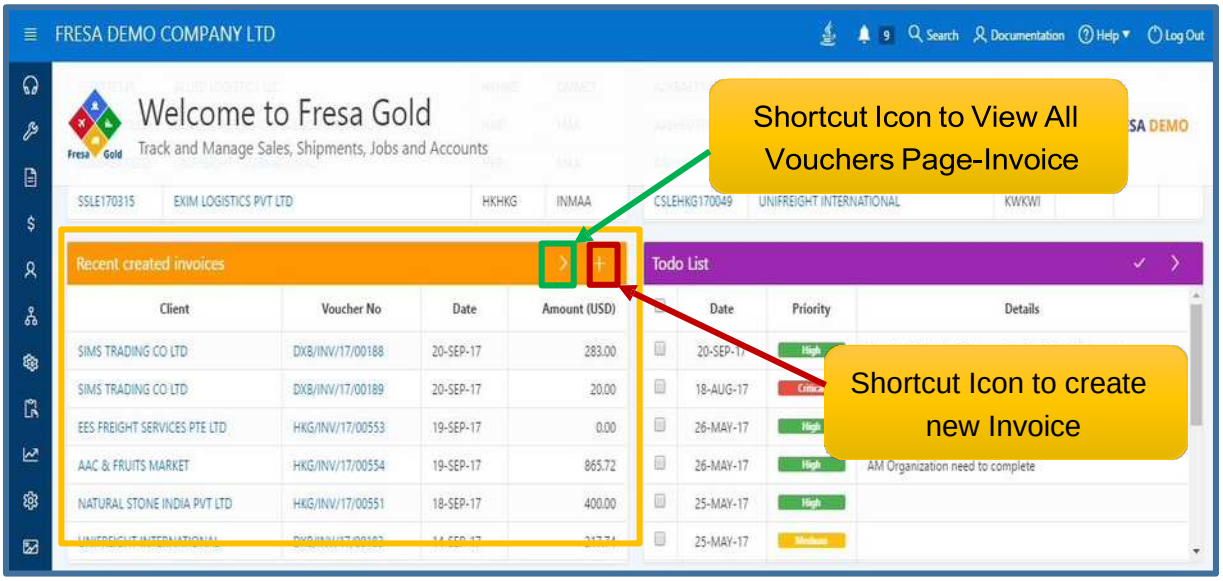


Current Active Job Window_Home Page Screen

- shortcut icon is available to redirect the system to the *All Jobs Page Screen*.
- shortcut icon is available to redirect the system to the *Create Job Page Screen* to create New Jobs.

FAQ 16. How to view all Recent Created Invoices?

- All current active Jobs can be viewed in the *Recent Created Invoices Window* of the dashboard informations in *Home Page screen*.

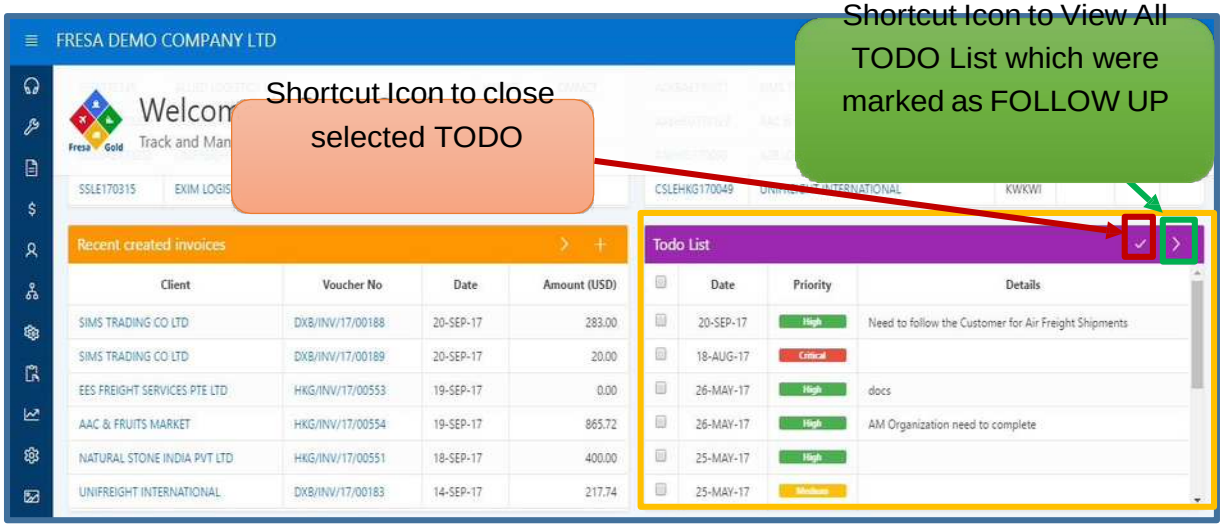


Recent Created Invoices Window_Home Page Screen

- shortcut icon is available to redirect the system to the *All Vouchers Page Screen* to view and edit all the Invoices.
- shortcut icon is available to redirect the system to the *Create Invoice Page Screen* to create New Invoice.

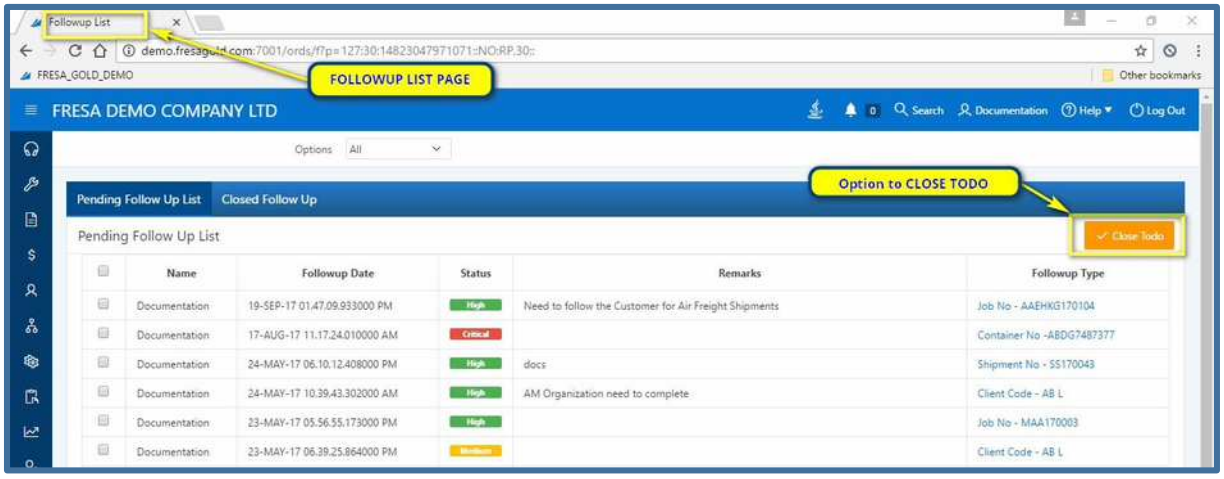
FAQ 17. How to view all TO-DO List?

- All TO DO List which were marked as Follow up can be viewed in the *Todo List Window* of the dashboard informations in *Home Page screen.*



Recent Created Invoices Window_Home Page Screen

- Shortcut icon is available to redirect the system to the Followup List Page Screen.

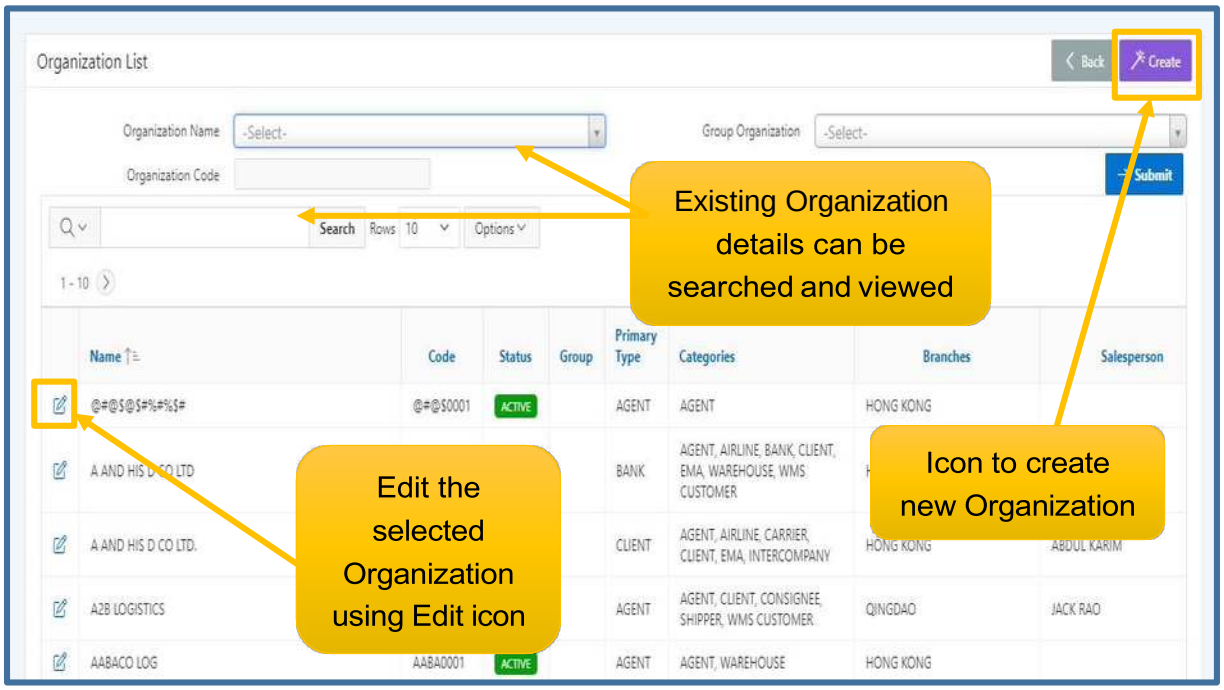


- Close Todo icon is available to close Todo or use Shortcut icon in dashboard screen to Close Todo.

FAQ 18. How to create Organization Master?

- To create new Organization Master, click icon or

icon from the expanded *Side Panel Toolbar* in *Home Page Screen*.
- *Master Page Screen* with the various Master List icons opens.
- Select *Organization Icon* and *Organization List Page Screen* opens.



Organization List Page

- Clicking

Icon will open *Create Organization Page Screen* with *Organization Name, Organization Address, Organization Category* and *Confirm Organization* tabs.
- Enter all the relevant details under each tabs and click

Icon.
- New Client or Shipper or Consignee can be created in the Organization Master.

FAQ 19. How to add standard charges to the created Organization Master?

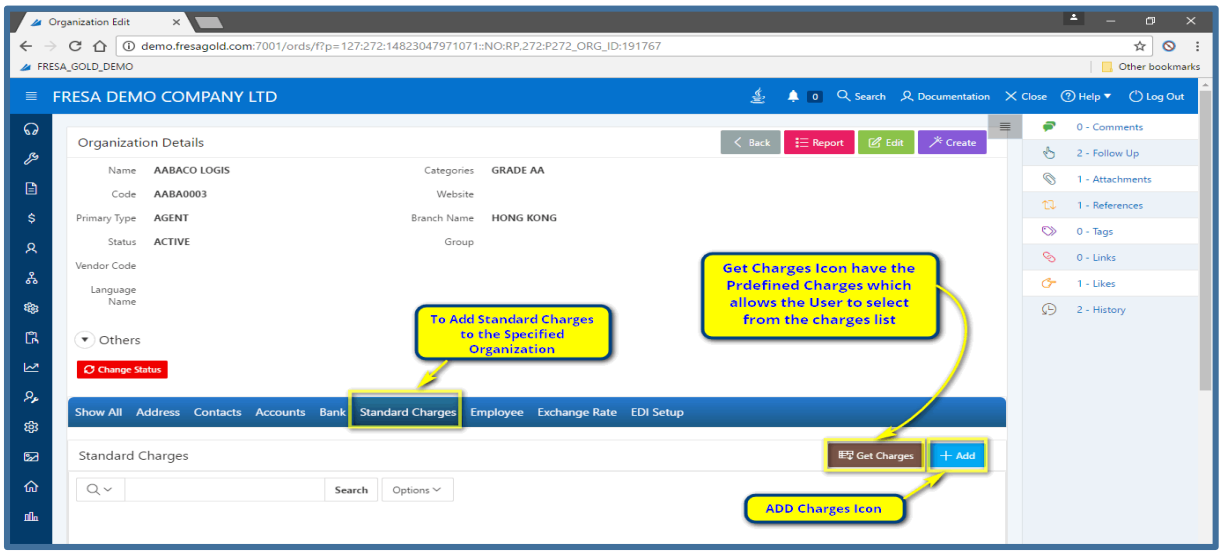
- Navigate to Organization Details Page by selecting Masters Icon from Expanded side panel Toolbar of Home Page Screen -> Organization Icon-> Organization List Page-> Select the Desired Organization by clicking icon beside the organization.
- The Organization Details page opens and under Special Tabs available, select

tab.
-

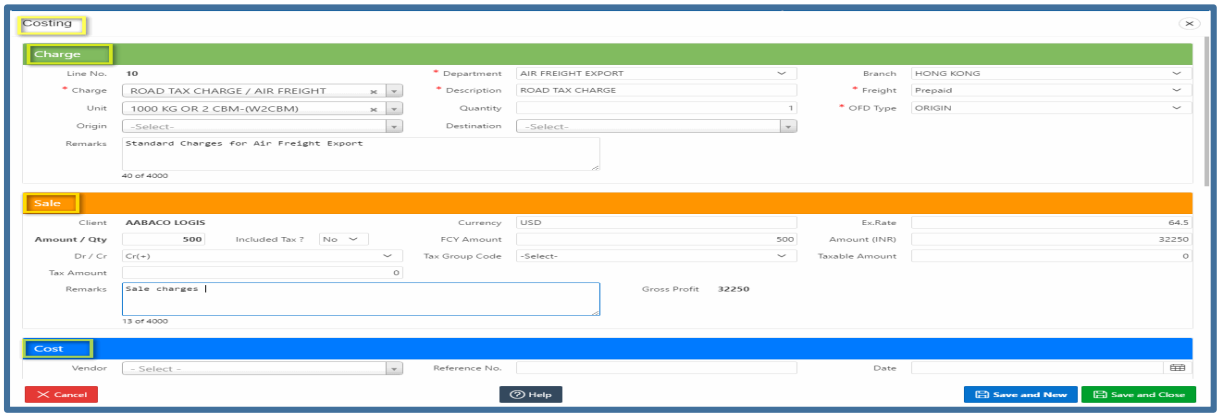
icon used to add charges which opens Costing pop up window to enter the charges details.

- Clicking

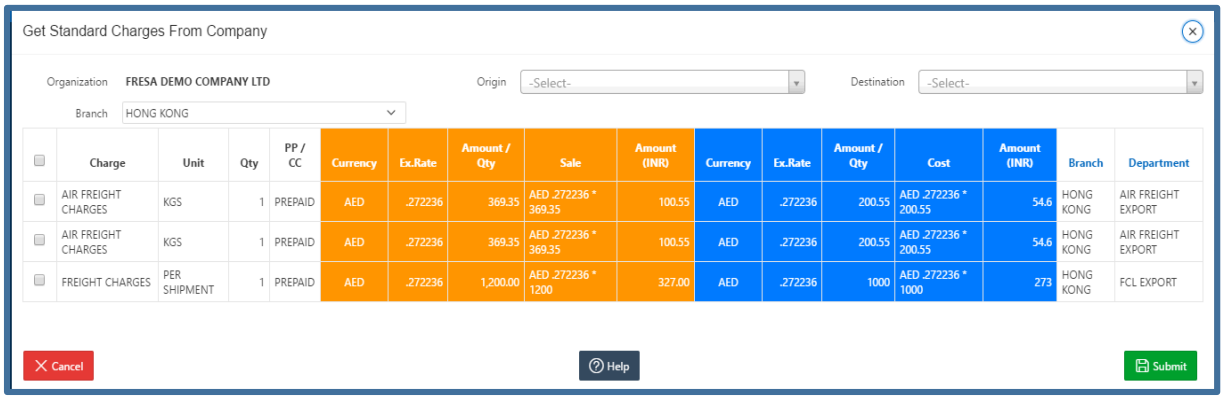
icon opens *Get Standard Charges from Company Pop up Window* is used to provide predefined Company standard charges from which user can select the desired charges from the available list.



Organization Details Page



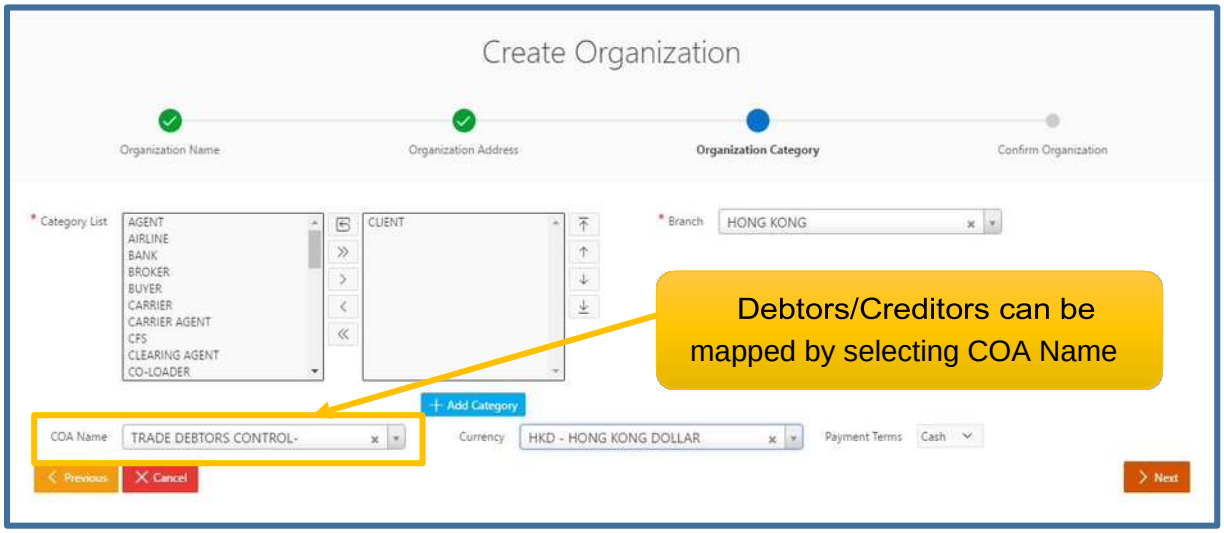
Add Icon -> Costing Pop up Window



Get Standard Charges From Company Pop up Window

FAQ 20. How Debtors/Creditors can be mapped?

- Debtors/Creditors can be mapped either while creating new *Organization Master* or under *Accounts Tab* of *Edit Organization Details Page*.
- **Method 1:**
  - Similar to FAQ 7 while creating new *Organization Master*, under *Organization Category Tab* of *Create Organization Page*, the appropriate *Creditors and Debtors* can be mapped by selecting from the drop down list of *COA Name* field available in the page.



Organization Category Tab_ Create Organization Page

- **Method 2:**
  - After Creating the Organization, while editing the details, *Creditors and Debtors* can be mapped.
  - Click icon available to the left side of the name of organization field, *Organization Edit Page Screen* opens.

Organization Details Page

- Under Accounts Tab, clicking + Add icon will open *Accounts Pop up Window*.
- Under *Chart of Accounts Tab*, the *Creditors/Debtors* can be mapped by selecting from the *COA Name* field.

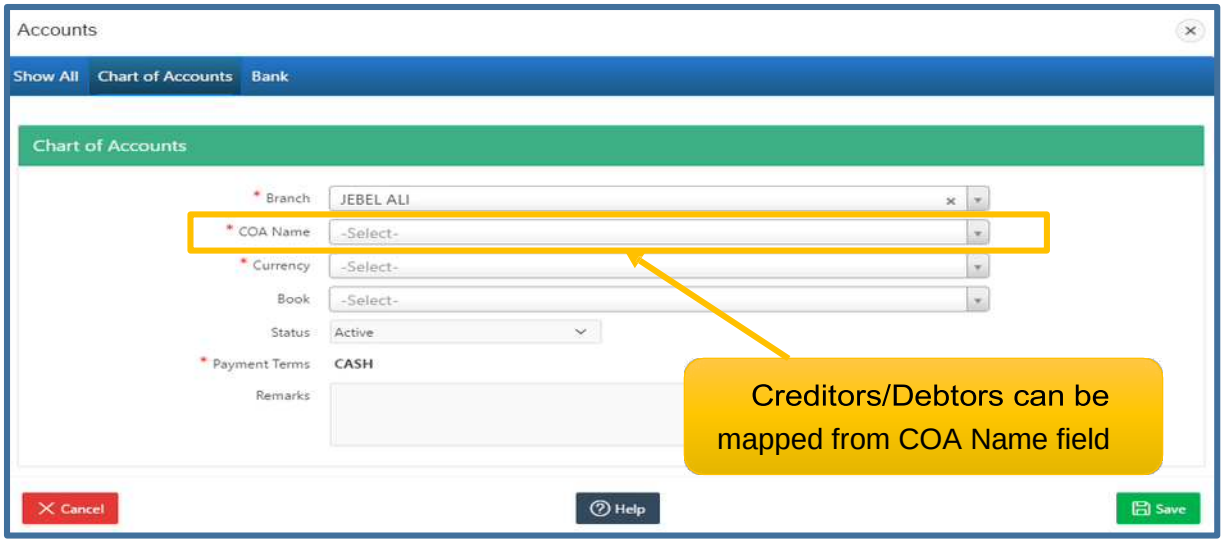
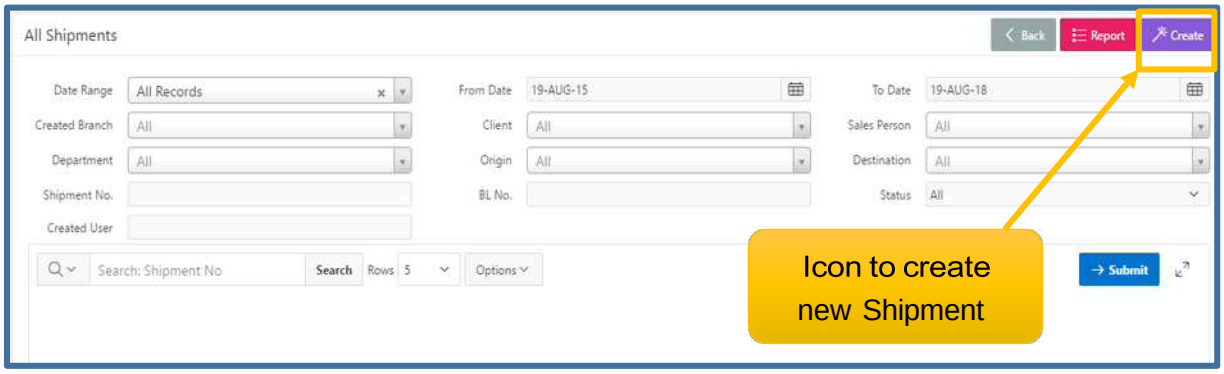


Chart of Accounts Tab_Accounts Page

FAQ 21. How to create a New Shipment?

- To create a new Shipment, click or Customer Service icon from the expanded *Side Panel Toolbar* in *Home Page Screen*.
- *Customer Service Page Screen* opens.
- Select *All Shipments* icon from the menu and *All Shipments Page Screen* opens.
- Click Create icon available in the top right corner of the *All Shipments page Screen*.
- *Create Shipment Page Screen* opens with *Create Shipment, Port Details, Planned/Consignment, Charge Details* and *Summary Tabs*.
- Select the *Type of Shipment* to be created such as Air Freight Export, Air Freight Import, FCL Export, FCL Import, LCL Export or LCL Import.



All Shipments_Page

- Enter all the relevant details under each tabs click Next and finally click Finish Icon.
- The New Shipment can be created successfully.

FAQ 22. How to Add/Detach Shipment?

- **To Add Shipment:**
  - Multiple Shipments can be added to the same Job.
  - Under *Job page*, *Subjob* tab is available.

Subjob Tab_Job Page

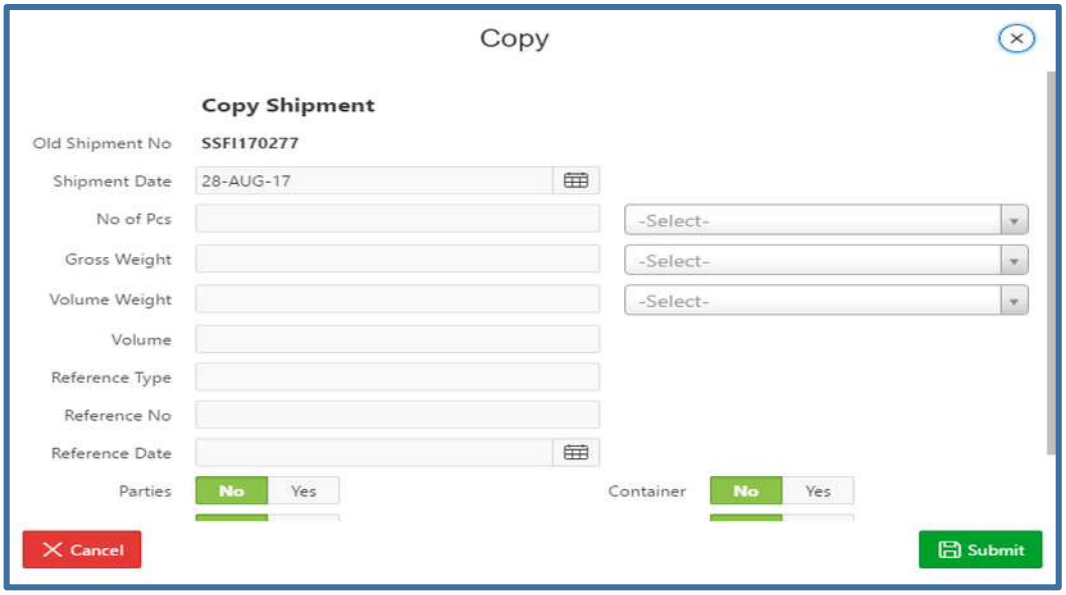
- Add Shipment Icon is used to Create/Add multiple Shipments to the Job.
- *Create Shipment Page* appears and multiple shipments can be added as explained in the section FAQ 15 in the manual.
- Attach Shipment Icon is used to upload the shipment from the specified format.

- **To Detach Shipment:**
  - Detach Shipment Icon is used to detach the selected shipment.

FAQ 23. Is it possible to Copy new Shipment based on existing one ?

- Yes it is possible to copy new Shipment details based on existing Shipment.
- In *Shipment Details Page,* click

icon and *Copy Pop up Window* opens.
- Existing shipments can be copied and further amendments can be done.

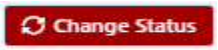


Copy-Pop up Window

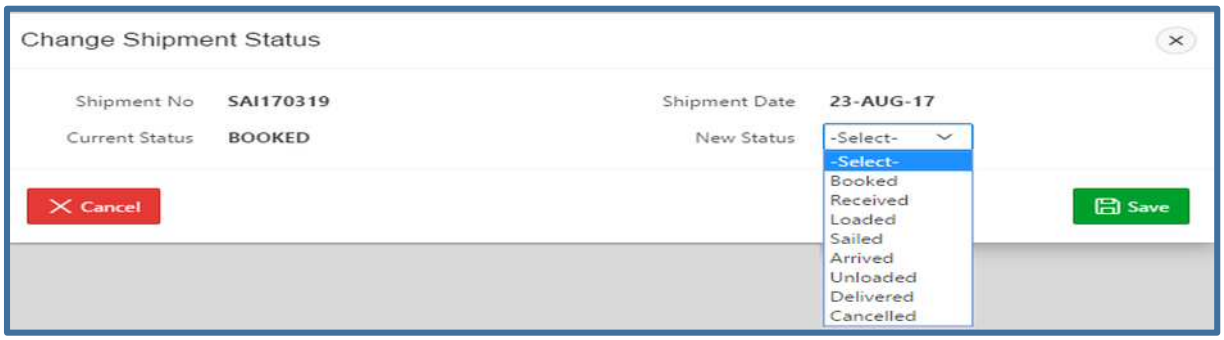
- Enter the relevant details such as Shipment Date, No of Pcs, Gross Weight, Volume Weight, Volume, Reference Type, Reference No and Reference Date. Select either Yes or No icons for Parties, Consignment, Cost, Sale, Dimensions and Activities fields.
- Click

to copy Shipment details. New Shipments will be copied based on the older shipments.

FAQ 24. How to change Shipment Status?

- In *Shipment Details Page*, click 

icon and *Change Shipment Status-Pop up Window* appears.



Change Shipment Status-Pop up Window

- Default *Shipment No, Shipment Date* and *Current Status* will be displayed in the fields.
- Under *New Status* drop down list field, select relevant status such as *Booked, Received, Loaded, Sailed, Arrived, Unloaded, Delivered* and *Cancelled*.
- Click Save to change the Shipment status.

FAQ 25. How to change HAWB Status or B/L Status?

- *HAWB status* for Air Freight and B/*L Status* for Sea Freight Export/Import can be changed respectively in *Shipment Details Page*.
- In *Shipment Details Page*, clicking Change B/L Status icon will open *Change B/L Status-Pop up Window*.

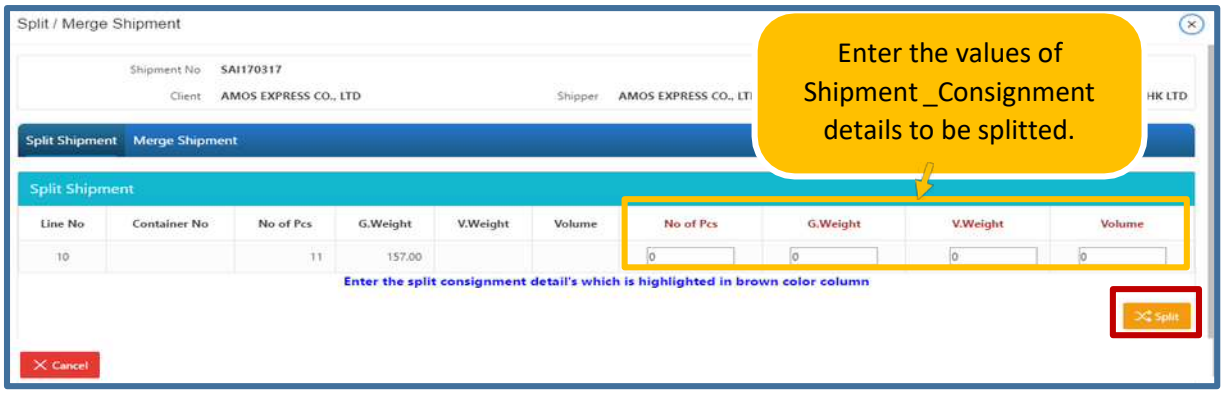
Change B/L Status-Pop up Window

- Default *B/L No* or *HAWB No*, *B/L Date* or *HAWB Date* and *Current Status* will be displayed in the respective fields.
- Under New Status drop down list field, select relevant status such as *Created, Draft, Original, Non-Negotiable, Express, Surrendered* and *Seaway Bill*.
- Click Change Status to change the respective status.

FAQ 26. What is the process to Split Shipment consignment details?

- The process to split the values of Shipment Consignment details is done in *Shipment Details Page*.
- In *Shipment Details Page*, clicking Split / Merge Shipment icon will open *Split/Merge Shipment-Pop up Window* with *Split Shipment* and *Merge Shipment* tabs.

- **Under *Split Shipment Tab:***



Split Shipment Tab _Split/Merge Shipment Pop up Window

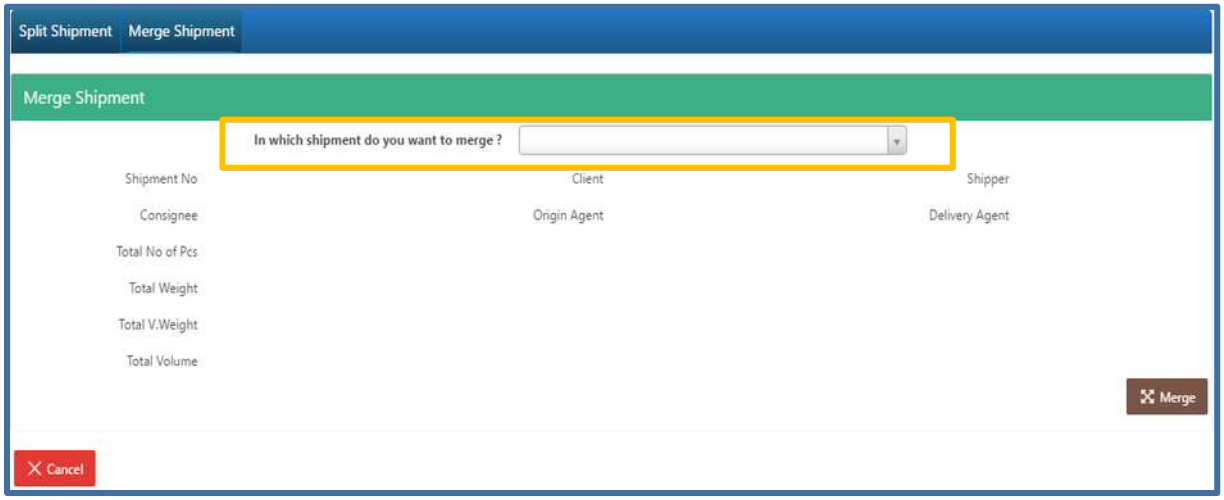
- Default details such as *Shipment No, Client, Shipper* and *Consignee* are displayed.
- In *Split Shipment table*, default values of *Line No, Container No, No of Pieces, Gross Weight, Volume Weight* and *Volume* are displayed.
- Enter the values of *Shipment_Consignment details* to be splitted in the fields given.
- Click

icon to split the Shipment_Consignment details.

FAQ 27. What is the process to Merge two Shipments?

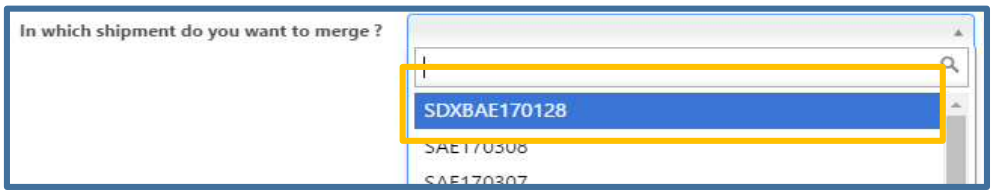
- The process to merge two Shipments can be done in *Shipment Details Page*.
- In *Shipment Details Page*, clicking

icon will open *Split/Merge Shipment-Pop up Window* with *Split Shipment* and *Merge Shipment* tabs.
- **Under *Merge Shipment Tab:***



Merge Shipment Tab_Split/Merge Shipment Pop up Window

- In *Merge Shipment Tab*, select the *Shipment No* to be merged from the drop down list of the field given:



- Depending upon the *Shipment No* selected, the related details such as Shipment No, Client, Shipper, Consignee, Origin Agent, Delivery Agent, Total No of Pcs, Total Weight, Total Volume Weight and Total Volume are displayed in the page.
- Click

icon to merge the Shipments.

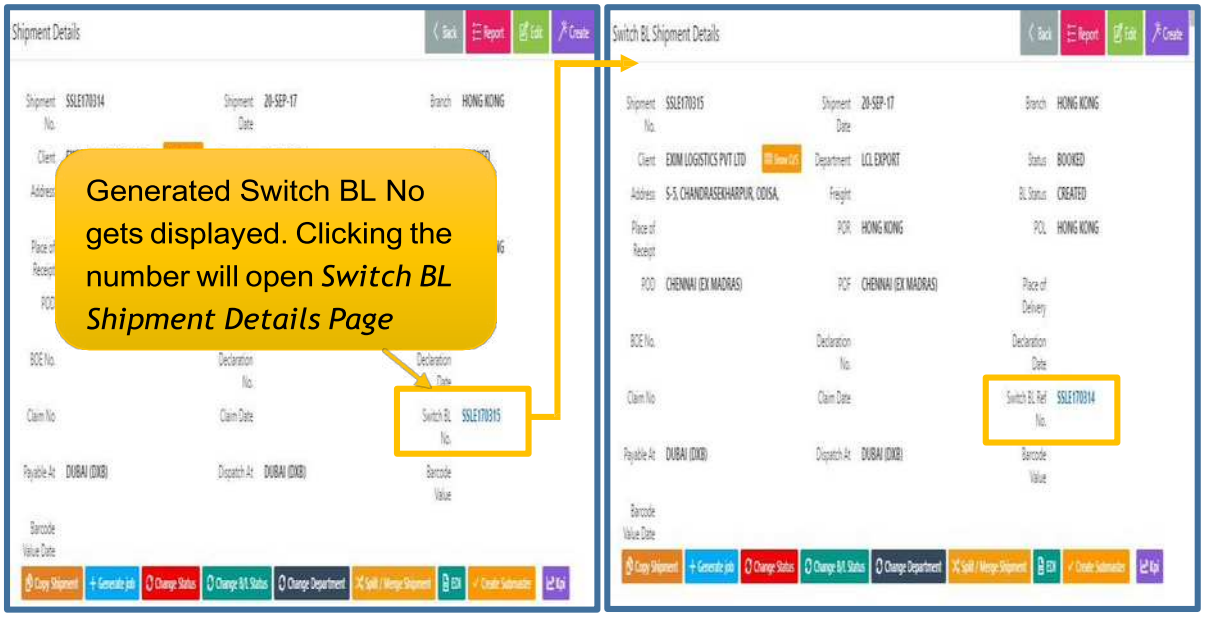
FAQ 28. Is it possible to Switch Bill of Lading for the Shipment?

- Yes, it is possible to switch Bill of Lading for the Shipment using

icon available in *Shipment Details Page*.
- Clicking

icon will open a *Confirmation-Pop up Window* for generating Switch Bill of Lading.
- Click

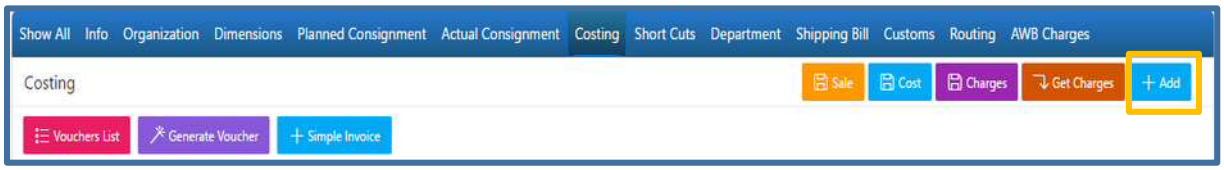
to generate Switch BL and the generated Switch BL No gets displayed in *Shipment Details Page* as shown below:



- Clicking the *Switch BL No* will redirect to the *Switch BL Shipment Details Page*.

FAQ 29. How to add Charges to Shipments?

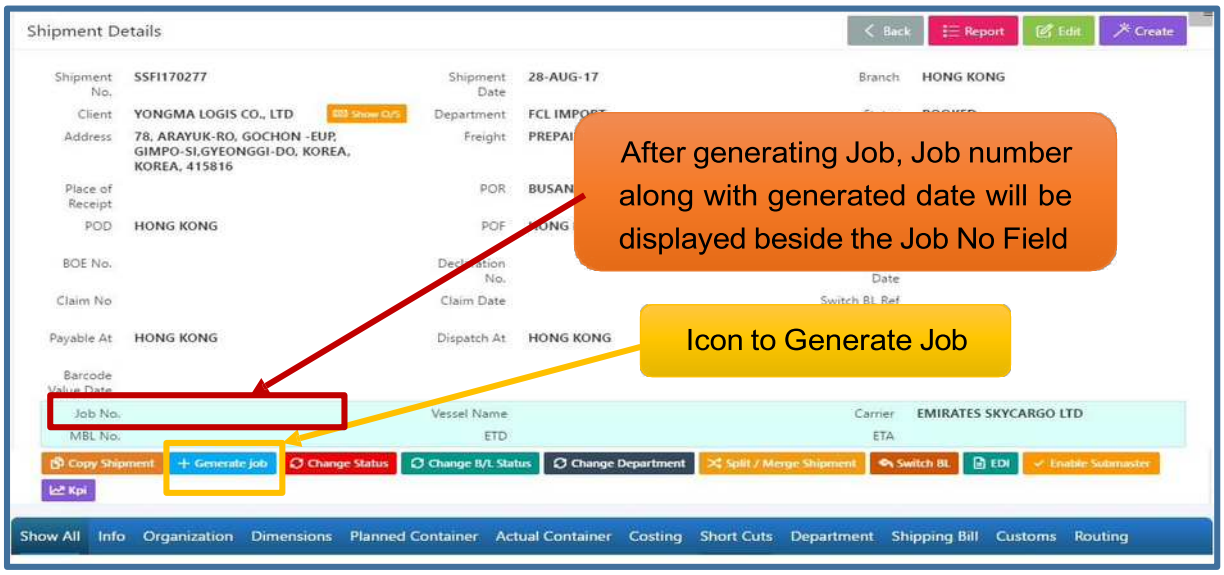
- + Add icon available to the right corner of the *Costing Tab* of both *Shipment Details Page* and *Job Page* is used to add Charges.



- Clicking + Add icon will open *Costing-Pop up Window*.
- New Charge details under Charge, Sale and Cost categories are entered and added.

FAQ 30. How to generate Job?

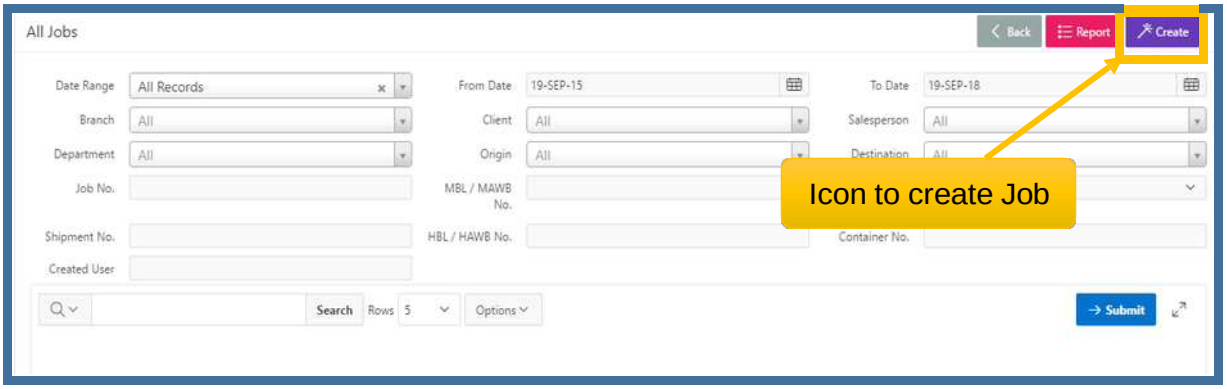
- Job can be generated either in the *Shipment Details Page* or using Create icon in the *All Jobs Page*.
- **Method 1:**
  - After creating the shipment the system will direct to the *Shipment Details Page*.



- Clicking + Generate job icon will open *Confirmation Message-Pop up Window*.
- Click OK icon to generate job or click Cancel icon to cancel job generation.
- Job will be generated successfully.

- Generated job number along with job generated date will be displayed in the '*Job No*' field of the shipment Details page.

- **Method 2:**
  - Click or Documentation icon from the expanded *Side Panel Toolbar* in *Home Page Screen*.
  - Clicking *All Jobs Icon* from the Documentation Menus will open *All Jobs Page Screen*.

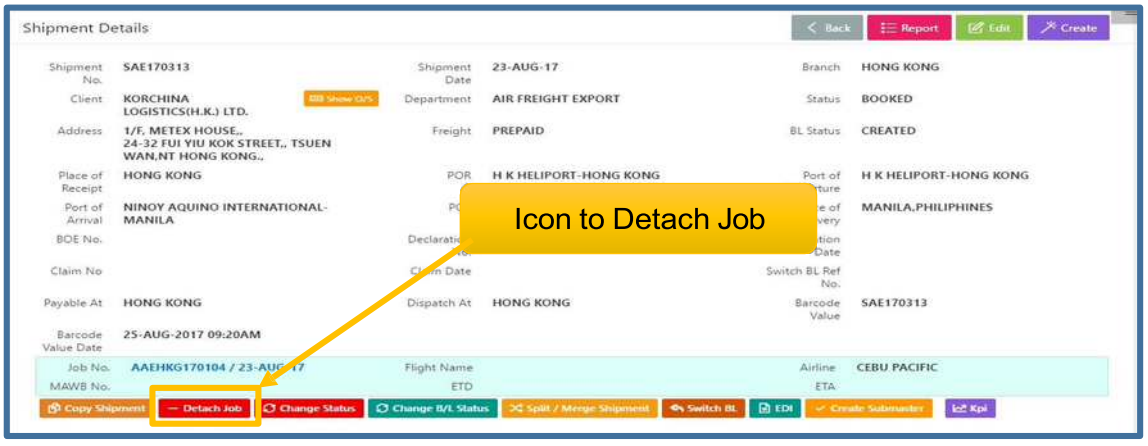


All Jobs Page

  - Click Create icon available in the top right corner of the *All Jobs Page Screen*.
  - *Create Job Page Screen* opens with *Department, Job Info, Container/Consignment, Costing and Summary* Tabs.
  - Enter the relevant details in each tab click Next to proceed to next tab.
  - After checking the entered details in *Summary Tab* and click Finish .
  - Job can be created successfully.

FAQ 31. How to Detach Job?

- Generated Job can be detached using Detach Job icon available in the *Shipment Details Page*.



Shipment Details Page

FAQ 32. How To View the Job Profit Sheet ?

- Using Job Profit Sheet icon available under the *Costing Tab* of *Job Page*, the user can view the *Job Profit Sheet* related to the Job/Shipments.

Job Profit Sheet- Pop up Window

- Download Icon available to download the Job Profile Sheet details in csv format.

FAQ 33. How to Close the Job and report the Profit and Loss ?

- Finance team will verify the Gross profit sheet and close the Job.
- Job can be closed by changing the status to close.
- In *Job Page*, click Change Job Status icon to change the Job status as closed.
- *Change Status-Pop up Window* appears.

Change Job Status - Pop up Window

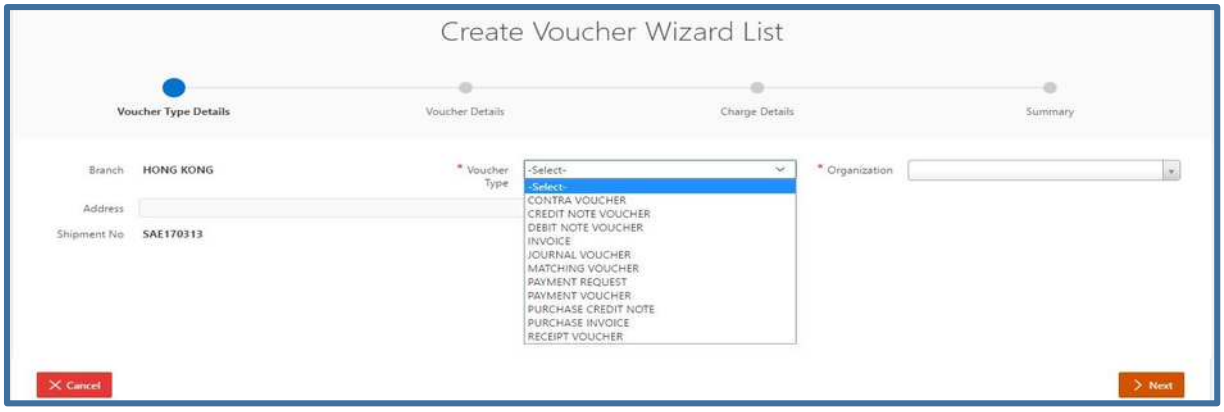
- Select the *New status* as **Closed**.
- Click Change Status icon.
- Job is closed successfully.

> *Remember*:
>
> After Job Closing, further Operational and Financial related entries are not allowed.

FAQ 34. What are the methods to create Vouchers/Invoices ?

- Vouchers such as *Invoice, Purchase Invoice, Payment Request*, *Contra Voucher, Credit Note Voucher, Debit Note Voucher, Journal Voucher, Matching Voucher, Payment Voucher* and *Receipt Voucher* can be created.
- *Vouchers/Invoices* can be created either directly in the *Shipment Details Page* or under *All Vouchers Menu* of $ Accounts Icon from the expanded *Side Panel Toolbar* in *Home Page Screen*.

- **Method 1:**
  - In Shipment Details Page, under Costing Tab Generate Voucher icon is available to create Vouchers/Invoices.
  - Clicking Generate Voucher icon will open *Create Voucher Wizard List Page* with *Voucher Type Details, Voucher Details, Charge Details* and *Summary* Tabs.

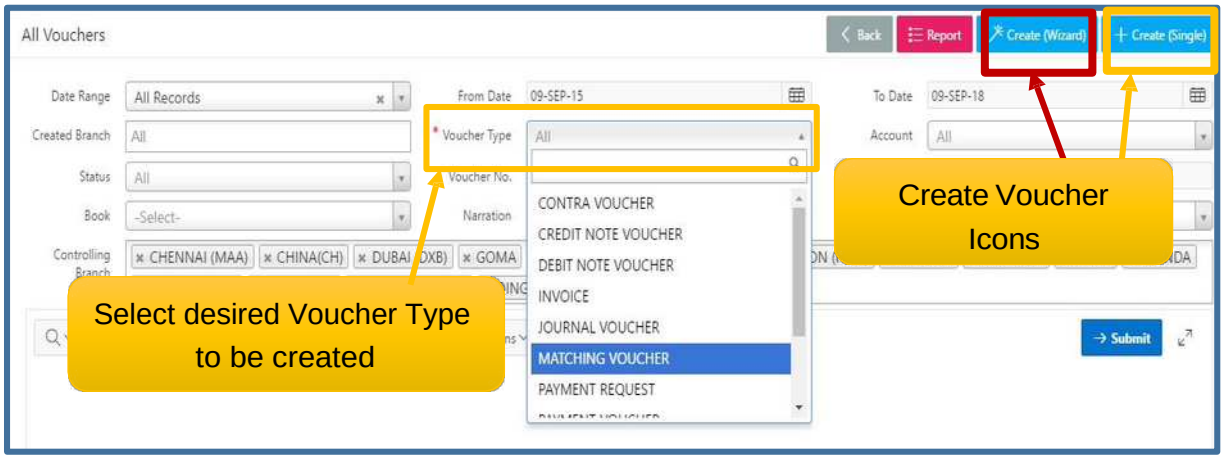


Create Voucher Wizard List Page

  - Enter all the relevant details under each tabs, click Next and finally click Finish Icon. Selected Voucher Type can be created successfully.

- **Method 2:**
  - Click $ icon or $ Accounts icon from the expanded *Side Panel Toolbar* in *Home Page Screen*.

- *Accounts Page Screen* with the various *Accounts Menu List* opens. Select *All Vouchers* option will open *All Vouchers Page*.

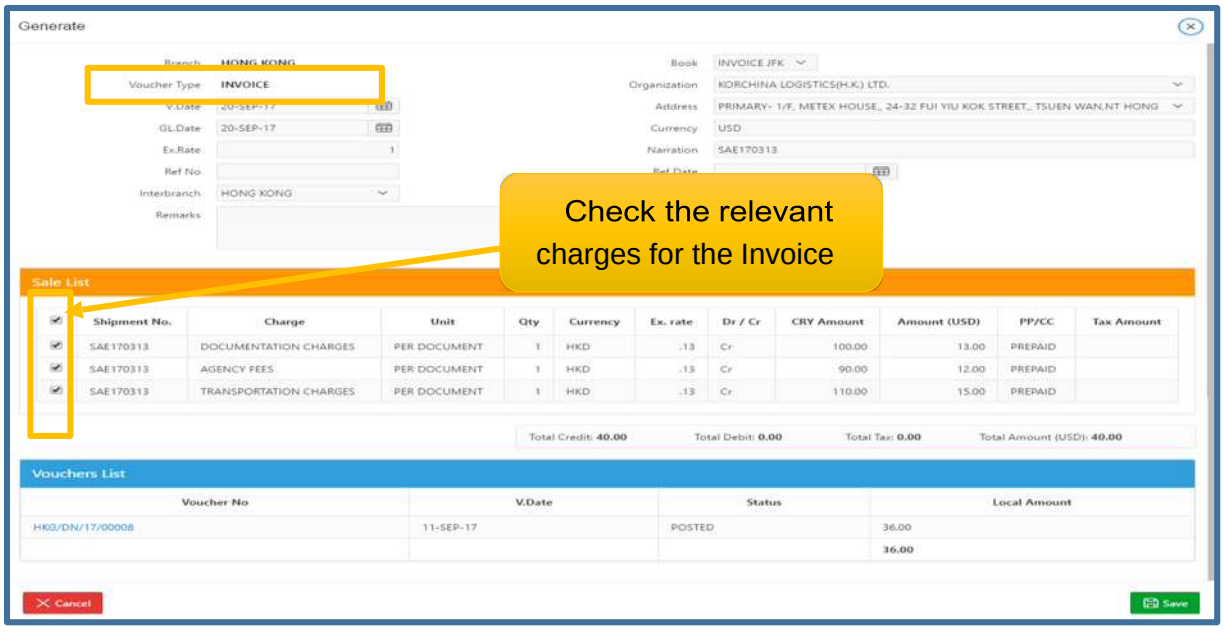


All Vouchers Page

- Select the desired Voucher Type from the drop down list.
- + Create (Single) icon is used to create Voucher in single page.
- Create (Wizard) icon is used to Create Voucher similar to above method 1.

FAQ 35. Any Alternate Icon is available to generate Invoice directly?

- Yes, direct shortcut icon is available under *Costing Tab* of both *Shipment Details Page* and *Job Page* to generate Invoice.
- Under Costing Tab, clicking + Simple Invoice icon will open *Generate-Pop up Window*.

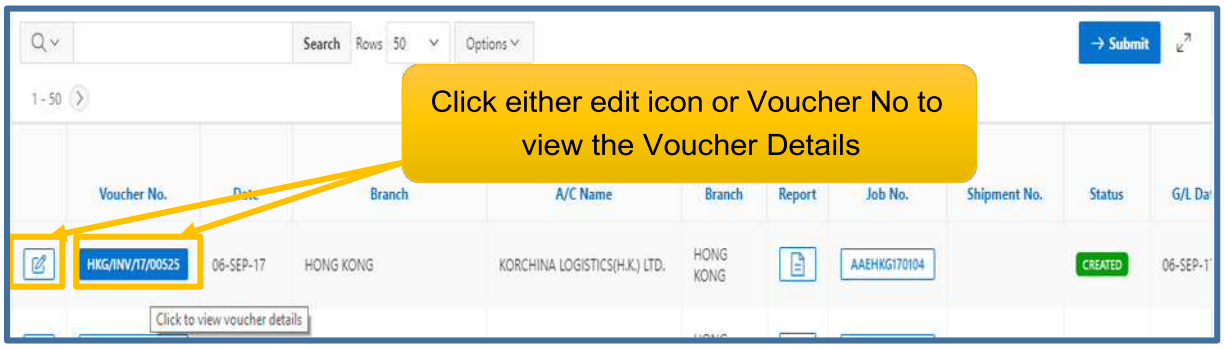


Generate-Pop up Window

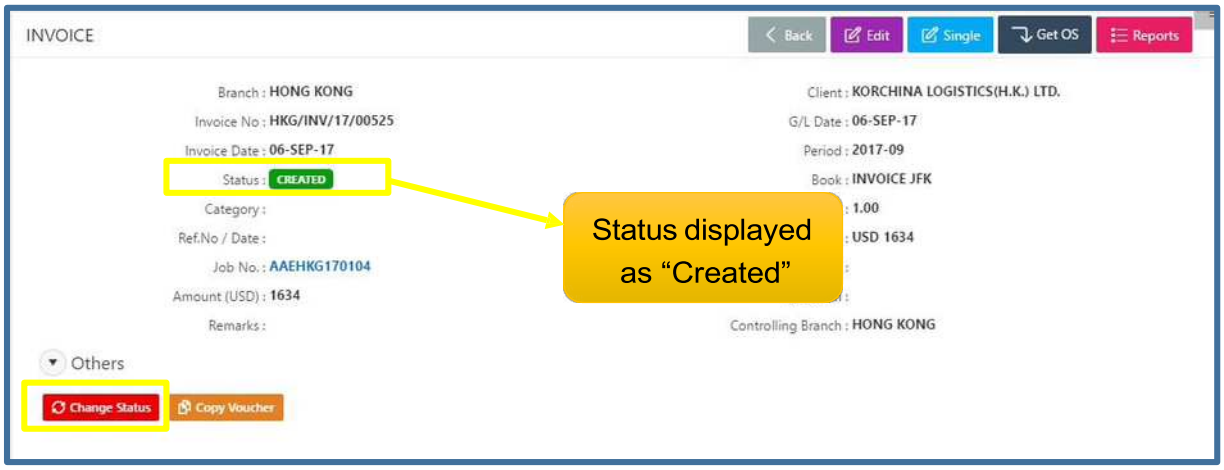
- Enter the relevant details and click Save to generate the Invoice.

FAQ 36. How to Approve and Post Invoices/Vouchers?

- Under *Accounts Menu* of *Accounts Page*, Select *All Vouchers* Icon.
- *All Vouchers Page* appears and using the filter options, search the created Voucher.

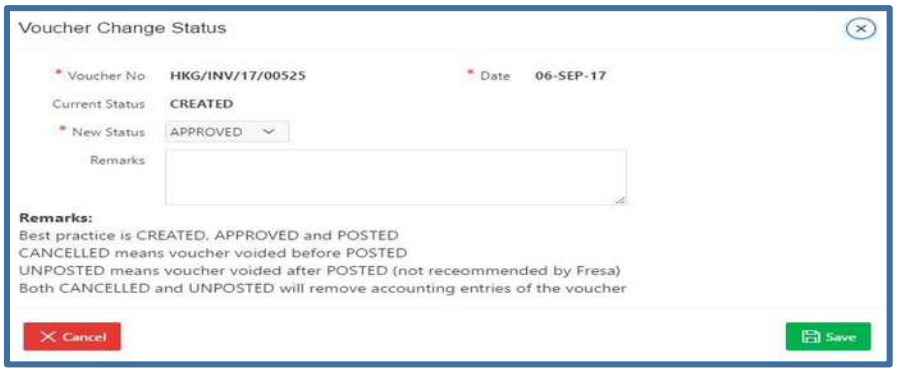


- Click the *Voucher No* or Click icon to view the Voucher Details.
- **For Instance:** Explanation for approving and posting a created Invoice is shown below:



Invoice Page

- Status will be displayed as "Created". Clicking icon will open *Voucher Change Status-Pop up Window* appears.

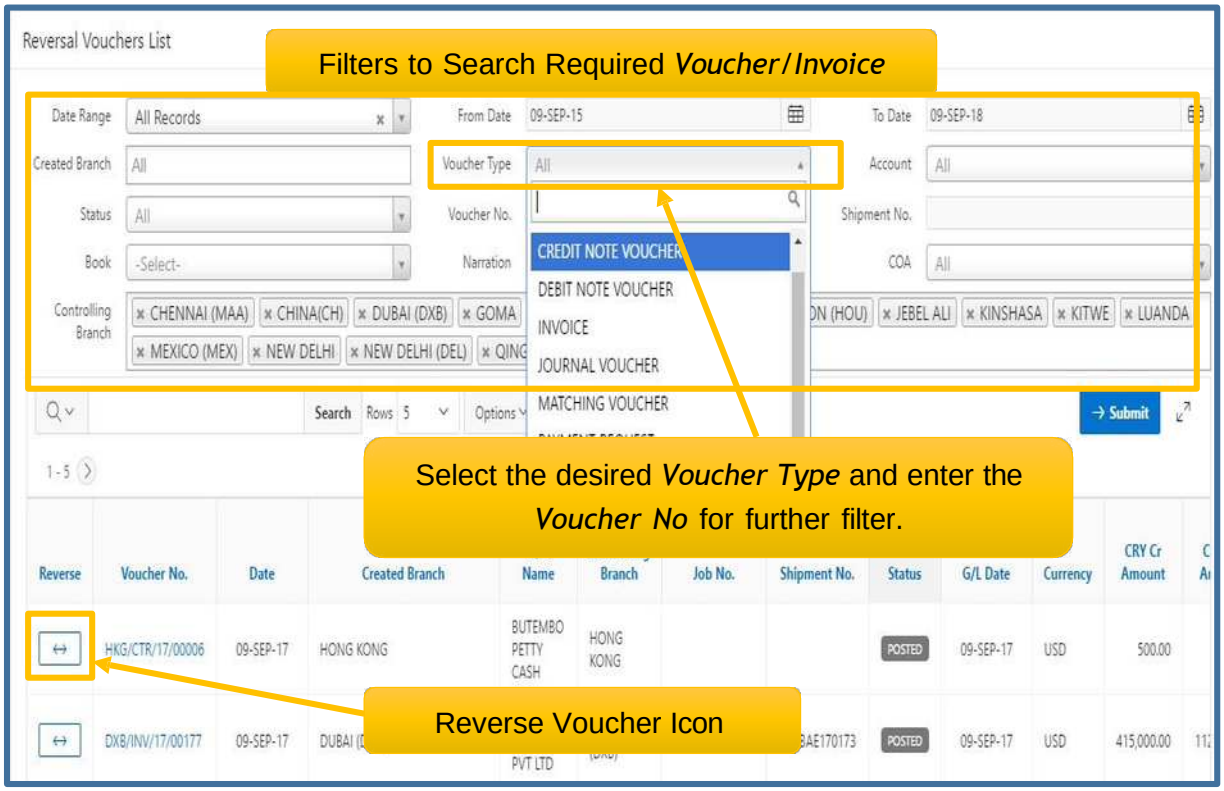


Voucher Change Status_Pop up Window

- Change the Status as "*Approved*". Click Save icon and status will be changed successfully and now the Status will be displayed as "*Approved*".
- To post Invoice, again click Change Status icon and similar *Voucher Change Status-Pop up Window* opens.
- Now Change the Status as "*Posted*".
- Clicking Save icon will change the status successfully and now the status will be displayed as "*Posted*".

FAQ 37. How to reverse the created Vouchers or Invoices?

- *Invoices* and the *Vouchers* such as *Credit Note Voucher, Debit Note Voucher and Journal Voucher* can be reversed.
- Click $ icon or $ Accounts icon from the *expanded Side Panel Toolbar* in *Home Page Screen*.
- *Accounts Page Screen* with the various *Accounts Menu List* opens.
- Select *Reversal Vouchers Icon* under *Accounts Menu* of the *Accounts Page Screen* and *Reversal Vouchers List Page Screen* appears.



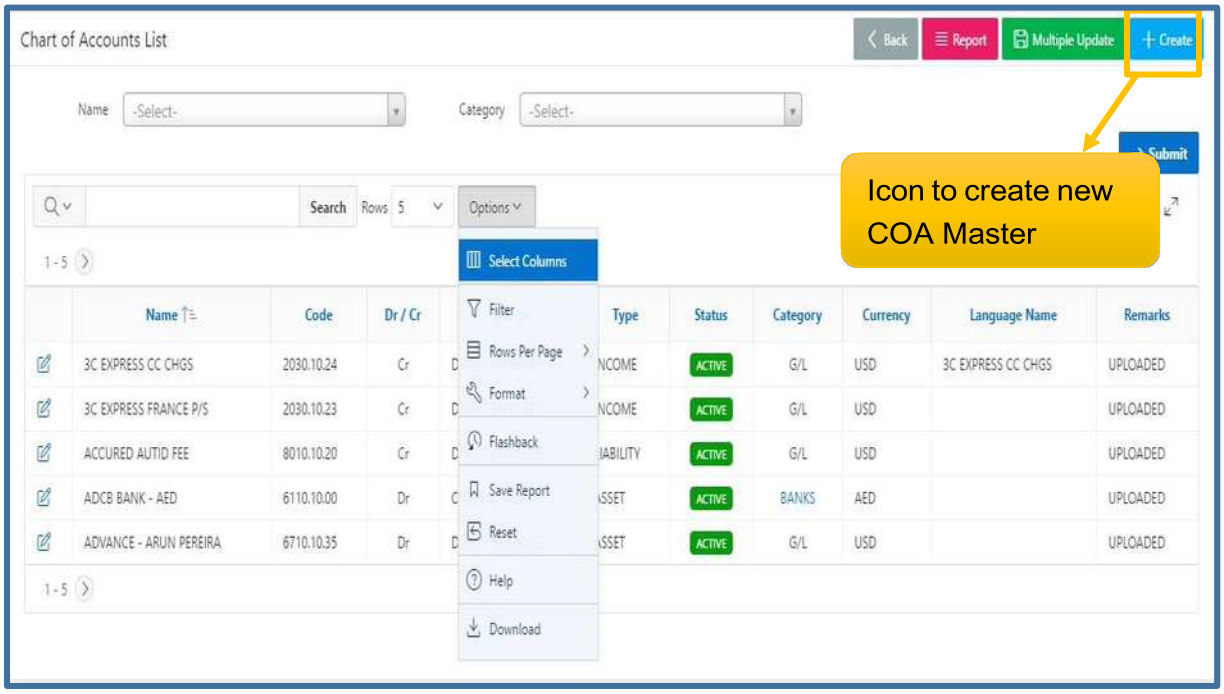
Reversal Vouchers List Page

- Select *Voucher Type* as '*Invoice*' or '*Purchase Invoice'* or appropriate Voucher in the filter options, click → Submit icon and the *Vouchers/Invoices* will be listed.

- For further filter, enter the Voucher Number across the *'Voucher No'* field.
- Clicking [↔] [Reverse] icon available corresponding to the Invoice/Voucher No will open the *Voucher Details Wizard Page* with *Voucher Details Tab and Reverse Voucher Details Tab.*
- Check the details in the *Voucher Details Tab.*
- Under *Reverse Voucher Details Tab* select the *Reversal Date* and enter the *Reversal Reason and Reversal Password* and the check box *'Accept to reverse the voucher'* should be checked.
- Clicking [Finish] icon will reverse the corresponding *Invoice/Voucher* successfully.

FAQ 38. How to create new Chart of Accounts [COA] Master?

- User can create the General Ledger in this COA Master.
- Clicking [$] icon or [$ Accounts] icon from the expanded Side Panel Toolbar in Home Page will open *Accounts Page screen* with the various Accounts Menu List.
- Click the *COA Master icon* available under the *Accounts - Settings Page Screen.*
- Chart of *Accounts List Page screen* appears.

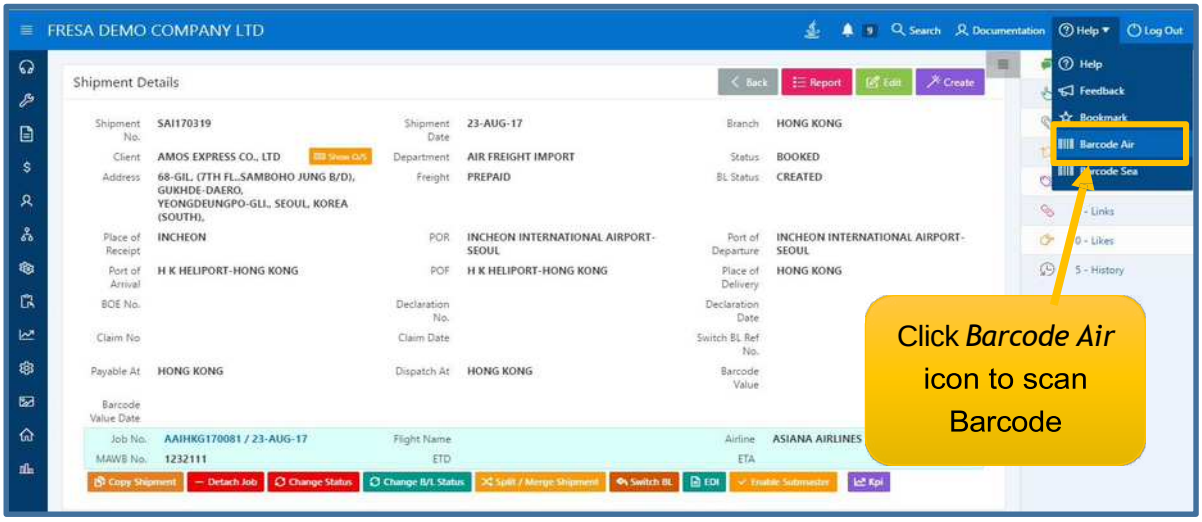


Charts of Accounts List Page

- Click [+ Create] icon available in the top right corner of the *Chart of Accounts List Page* to create new General Ledger Accounts.
- *Chart of Accounts Edit Pop up Window* appears.

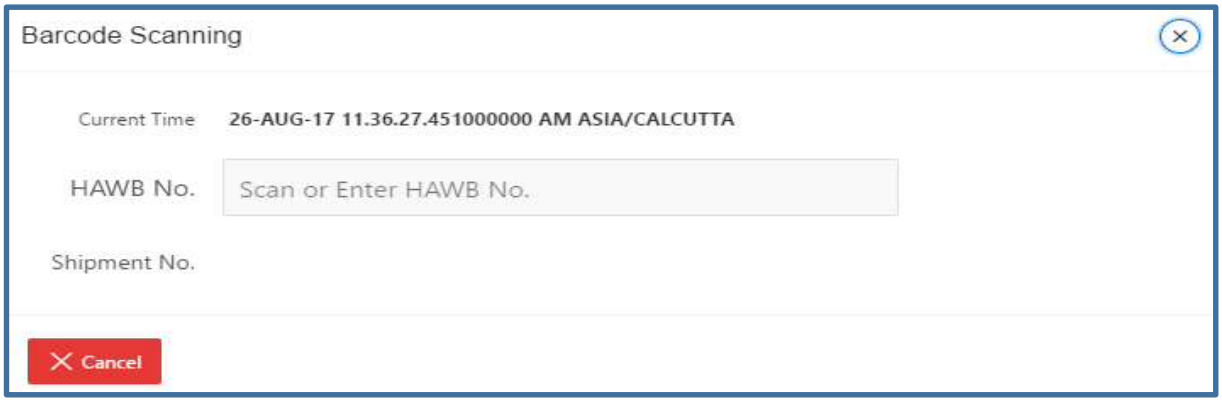
FAQ 39. How to scan Barcode?

- Search for the shipment details using the Shipment No and Shipment Details page will appear.



Shipment Details Page

- Under the Help menu, click Barcode Air icon to scan Barcode for Air Freight.
- Barcode Scanning Pop up Window appears.

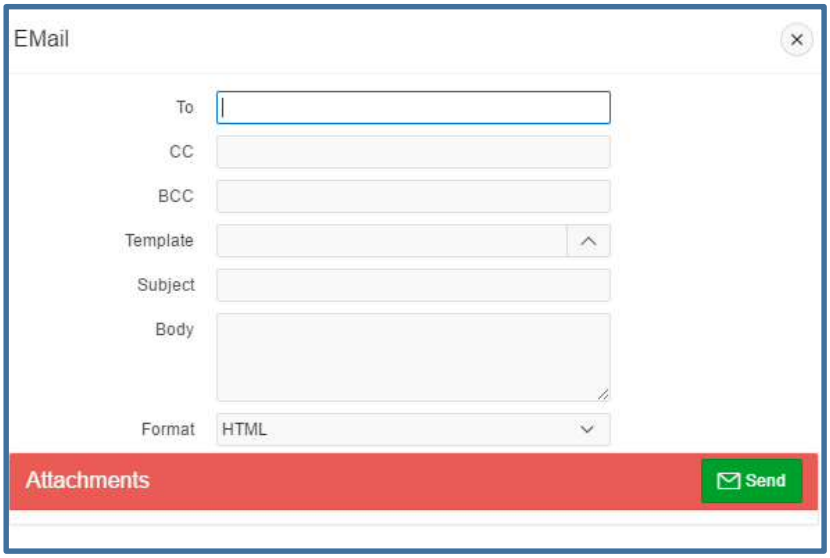


Barcode Scanning-Pop up Window

- Current Time format and Shipment No will be displayed in the field.
- Scan or enter the HAWB No
- Barcode for Air Freight has been scanned successfully.
- For Sea Freight, under the Help menu, click Barcode Sea icon to scan Barcode.

FAQ 40. Is it possible to email the generated report to clients?

- Yes, it is possible to email the generated report to clients and others.
- Email icon is available in the top right corner of all the generated report. Clicking this icon will open *Email-Pop up Window*.



Email-Pop up Window

- Enter *To, CC, BCC,* Subject and Body fields details.
- The user can select the desired *Email Template*.
- Click Send icon. The generated report can be mailed to the clients either in HTML or PDF format.

FAQ 41. How to attach the generated report for email?

- Attach icon is available in the top right corner of all the generated report. Clicking this icon will attach the generated report to the email.
- The following message will be displayed on the screen after clicking Attach icon:

Document attached successfully.

FAQ 42. How to add a specified report to Favorites List?

- Clicking Favorites icon available in the top right corner of the generated report and the system adds that report category as favorites.
- The Report category added in Favorites list will be displayed under *Favorite* options of the *List of Reports-Pop up Window*.

FAQ 43. What are the possible format to export the generated report?

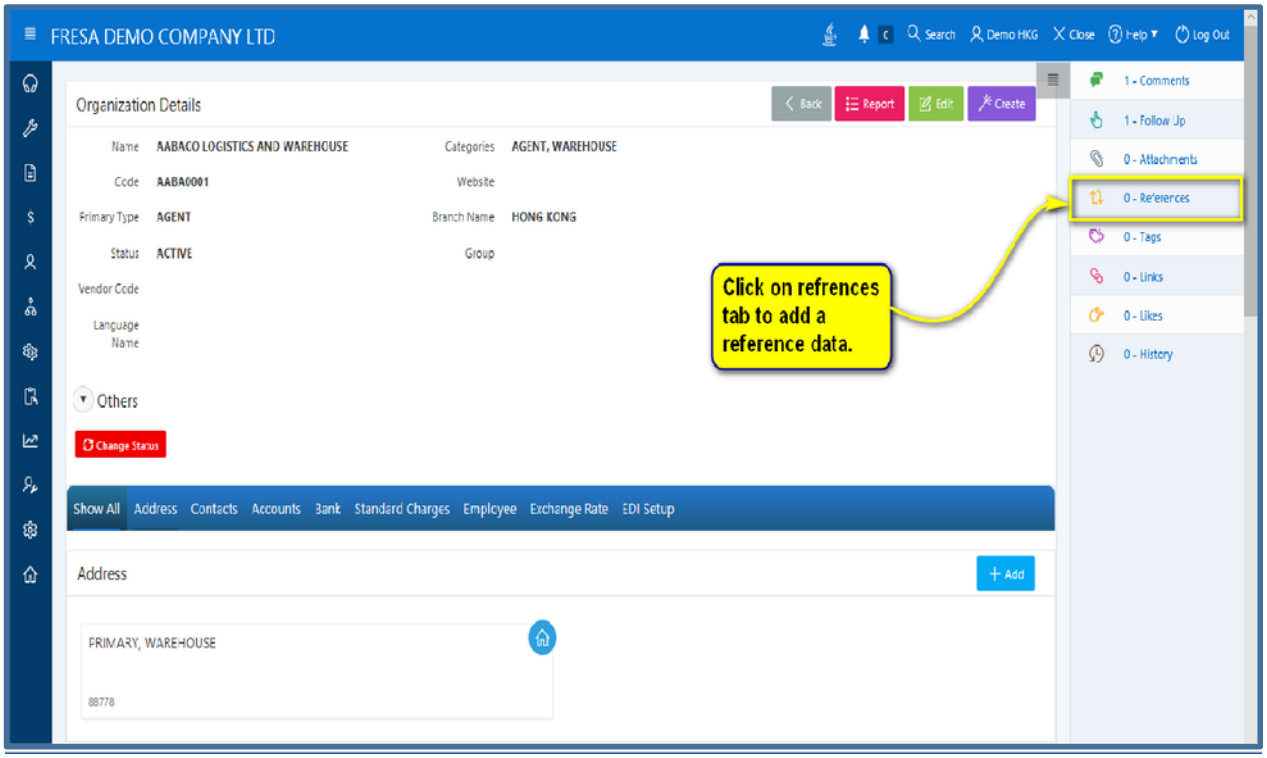
- The generated report can be exported either in *PDF* or *XLSX* format by using PDF or XLSX respective option available in top left corner of the generated report page.
- For the Jasper Reports, the report can be exported to the output format such as *PDF, XLSX, XLS, CSV, Word* or *RTF* by selecting from the drop down list of the "*Export Output Format"* field box available in the top left corner of the Jasper Type Report.

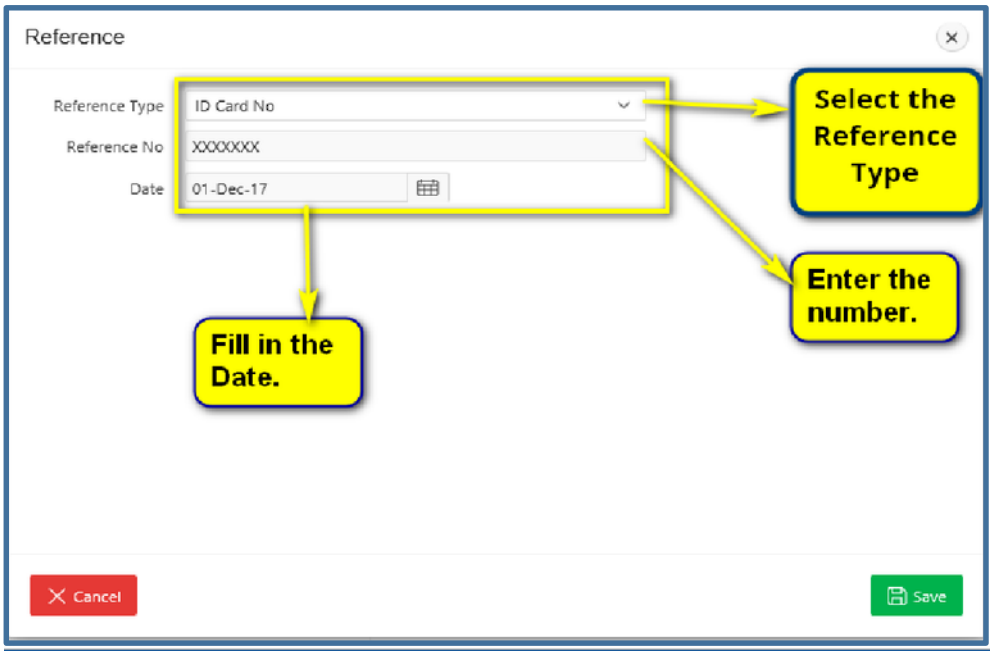
FAQ 44. Is it possible to print the generated report?

- Yes, it is possible to print the generated report by using the Print option available in the top left corner of the generated report page.

FAQ 45 . How to add a reference to a particular page?

- Click on the 0 - References button, located in the lefthand side of a specfic page.

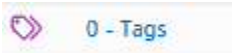




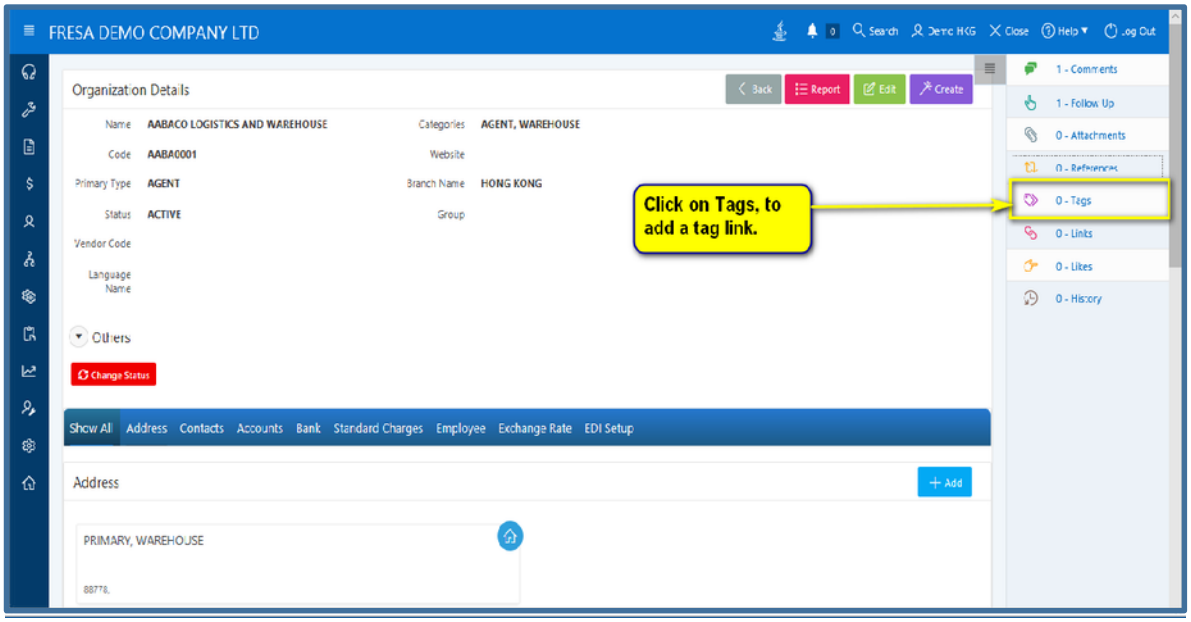
- References Pop up window opens and enter in reference type and respective reference number, followed by the date.
- Finally click

icon.

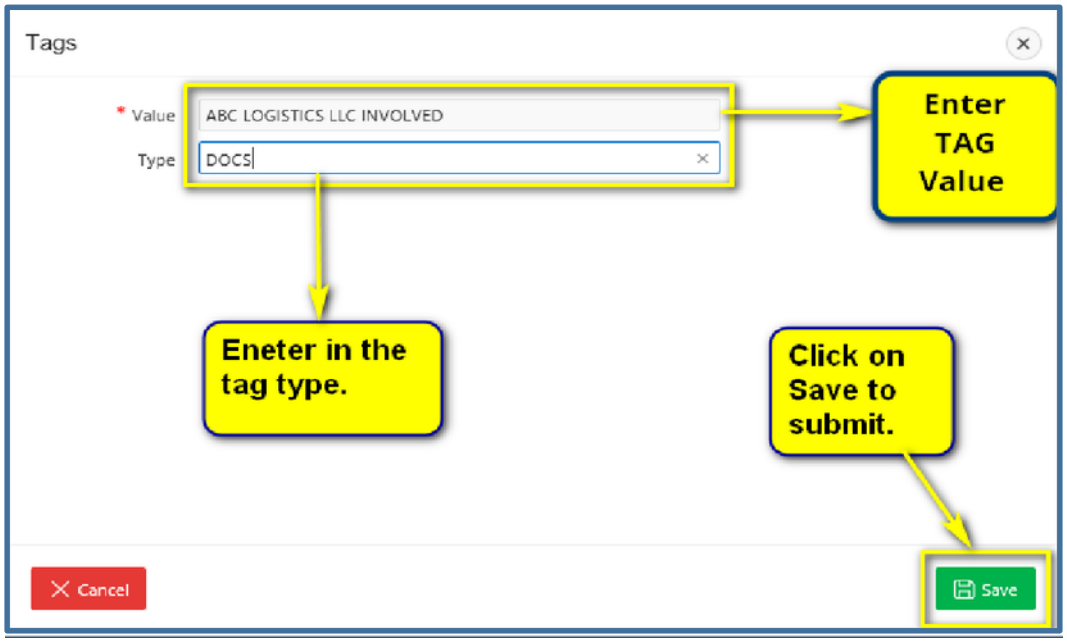
FAQ 46 . How to add a tag to a particular page?

- Click on 

button, located in the lefthand side of a specfic page.

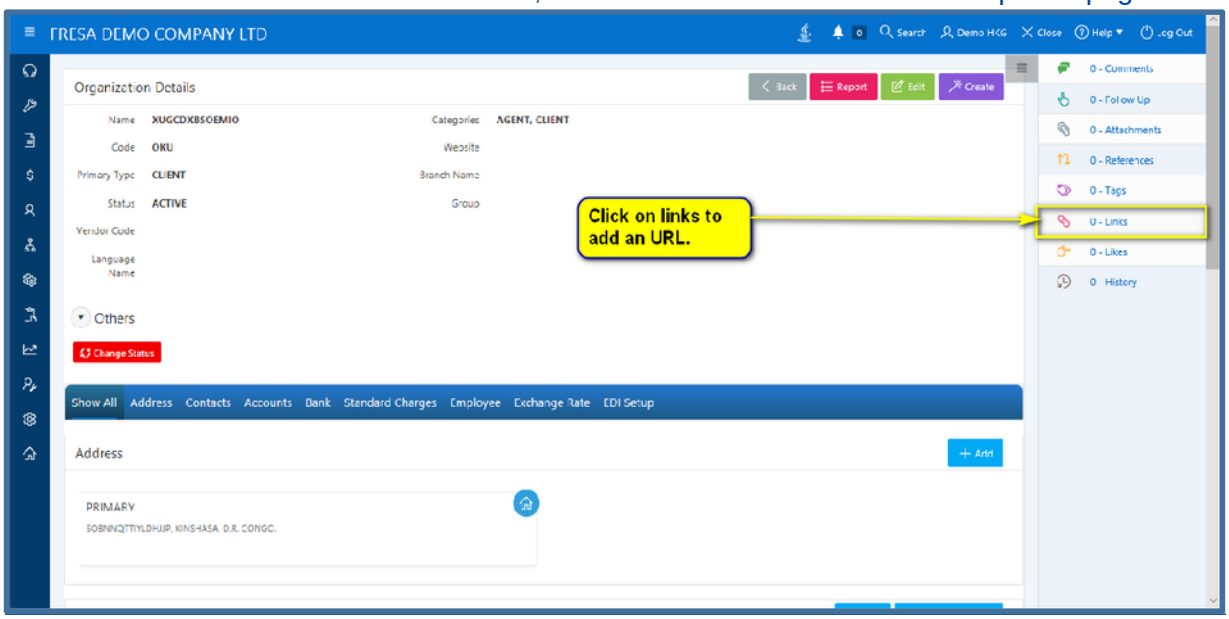


- Tags Pop up Window opens and add the value or keyword for the specific page and determine it type in the type entry field.

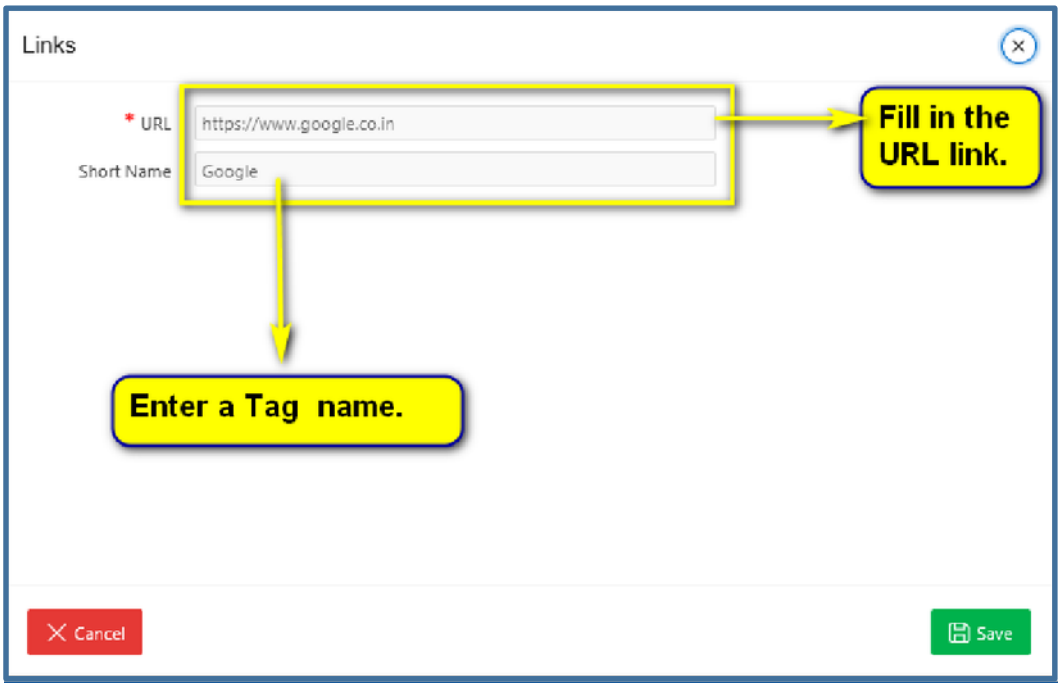


FAQ 47. How to add a link to a particular page?

- Click on button, located in the lefthand side of a specfic page

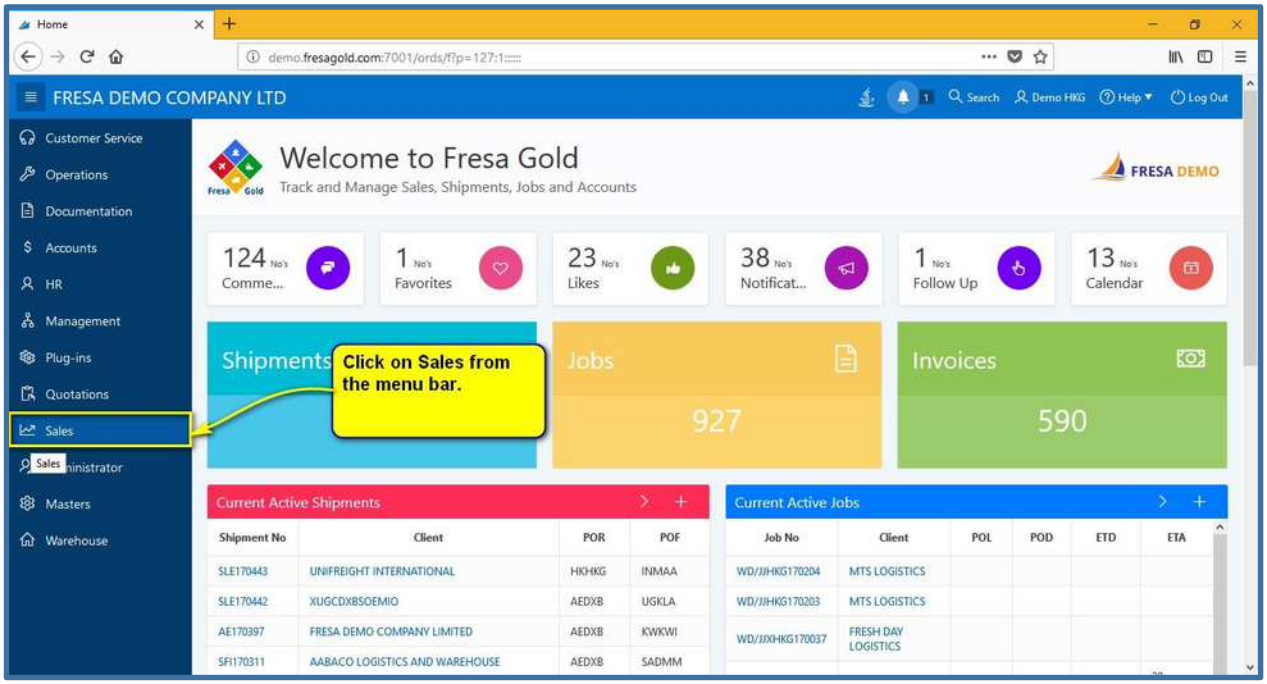


- Links Pop up Window opns and enter in the URL link followed by an alias/shortname, and click Save.

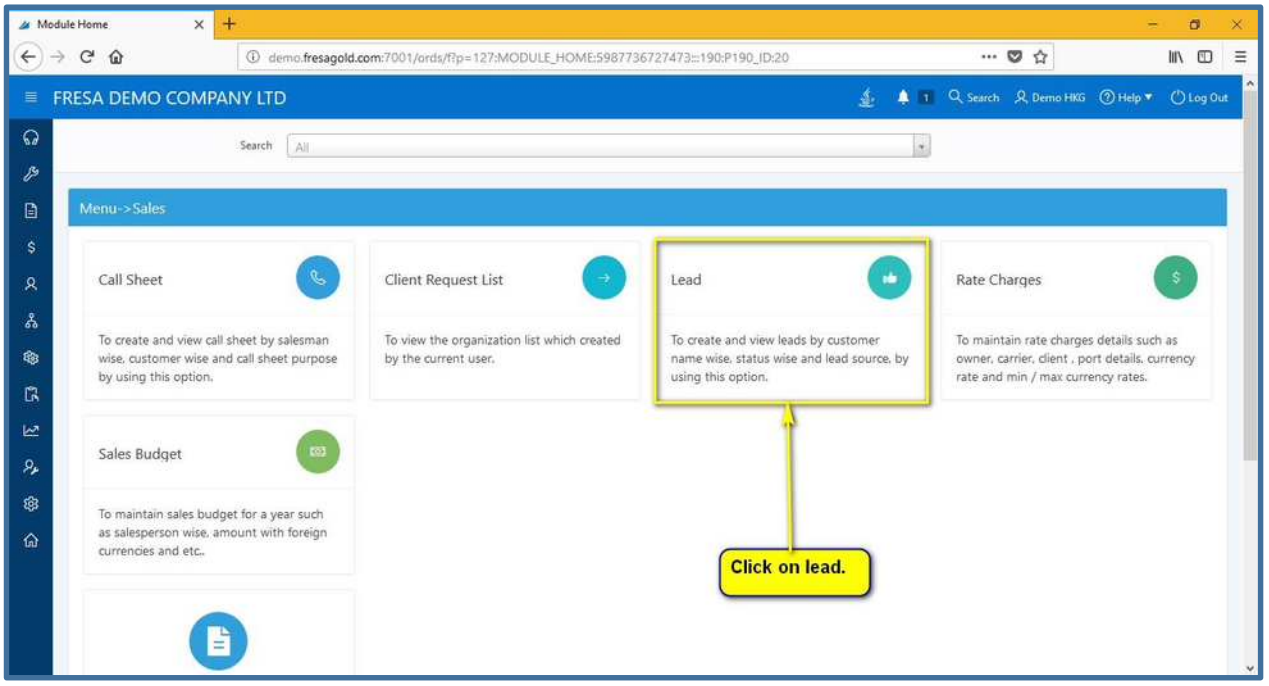


FAQ 48. How to create a sales lead follow up ?

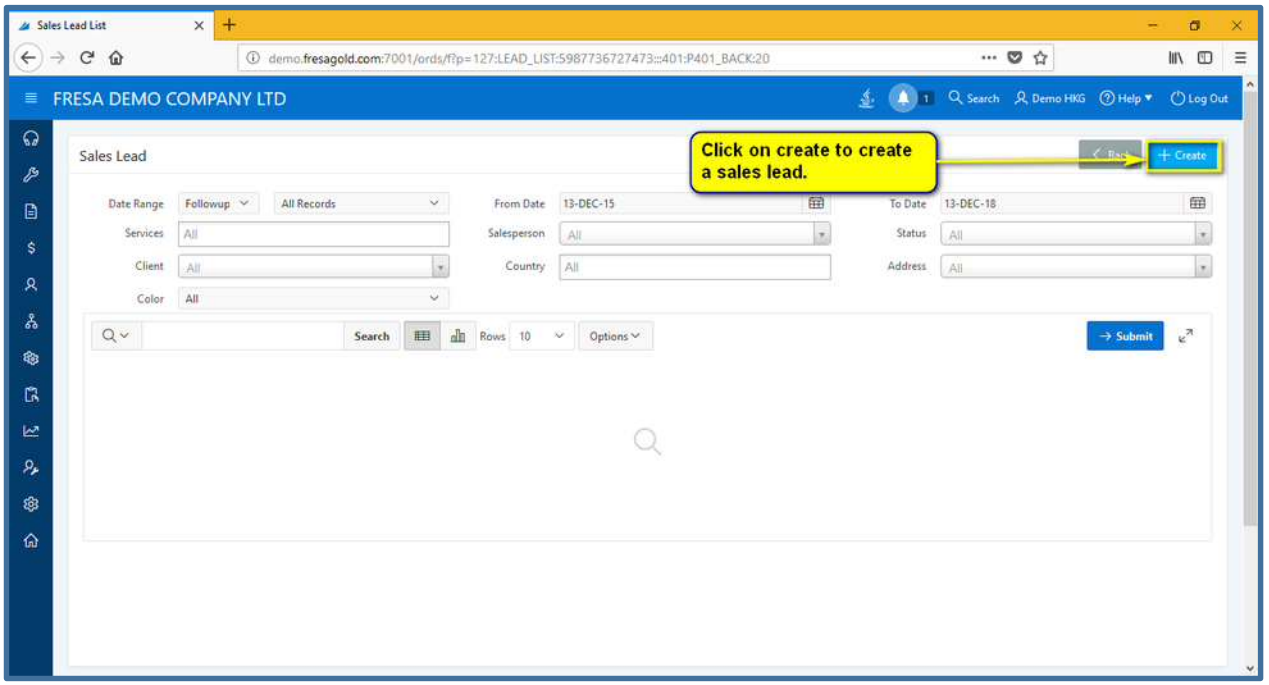
- Click on Sales from the menu bar.



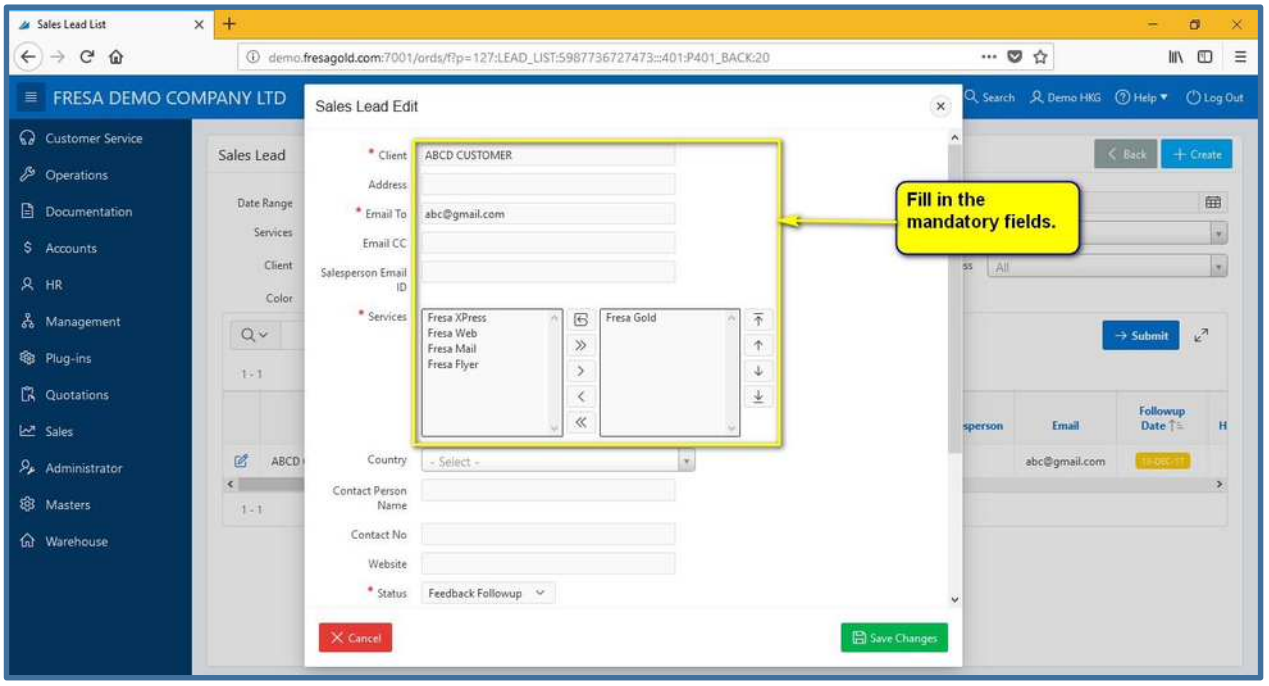
- Click on Lead from Sales menu.



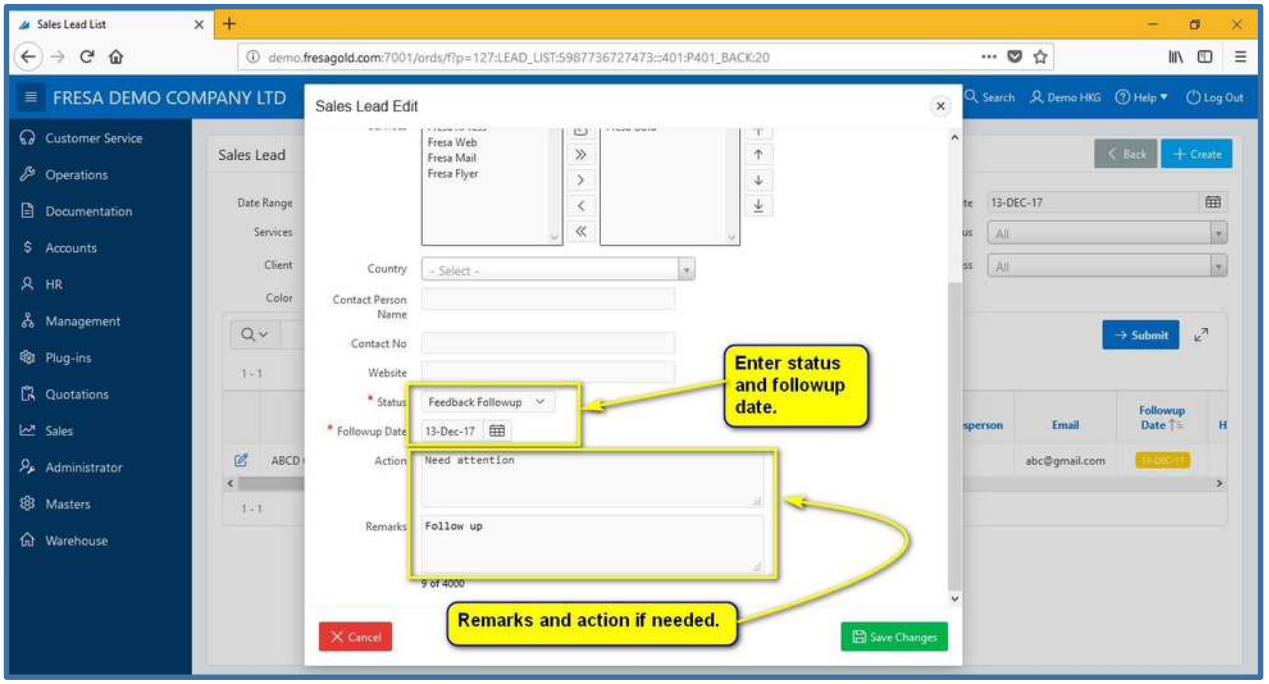
- Click on create located at the top right corner of the page.



- Enter in the details of the sales lead in Sales Lead Edit Pop up Window.

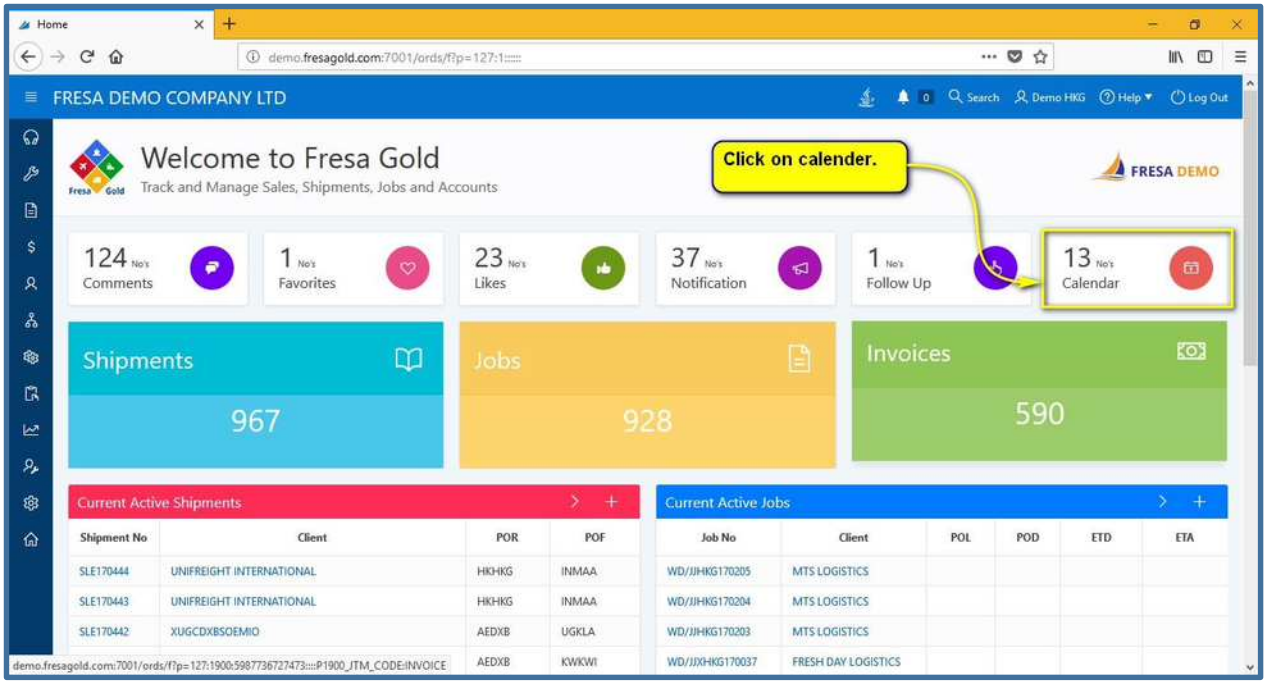


- Finally enter the status of the lead and follow-up date with respect to the lead, if needed action and remarks can be added.

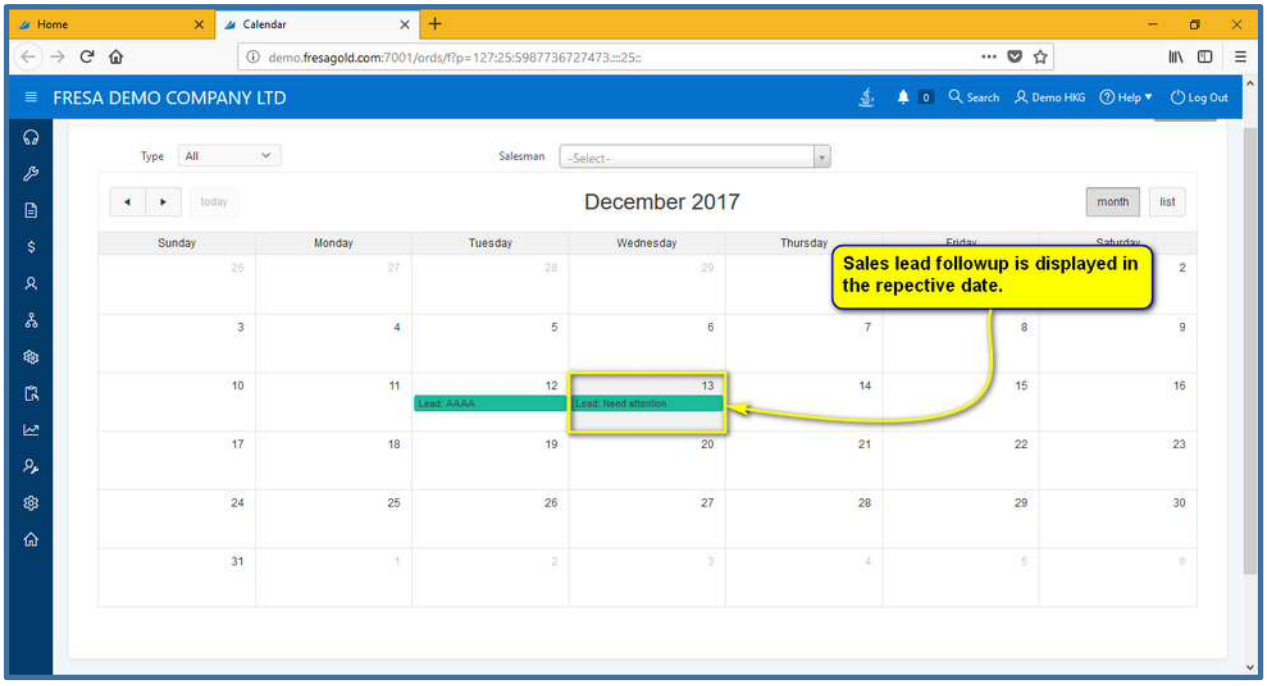


FAQ 49. What is the purpose of Calender icon in Home Page Screen ?

- Calender is used to keep track on the sales lead follow-up, Click on calender in the dashboard.

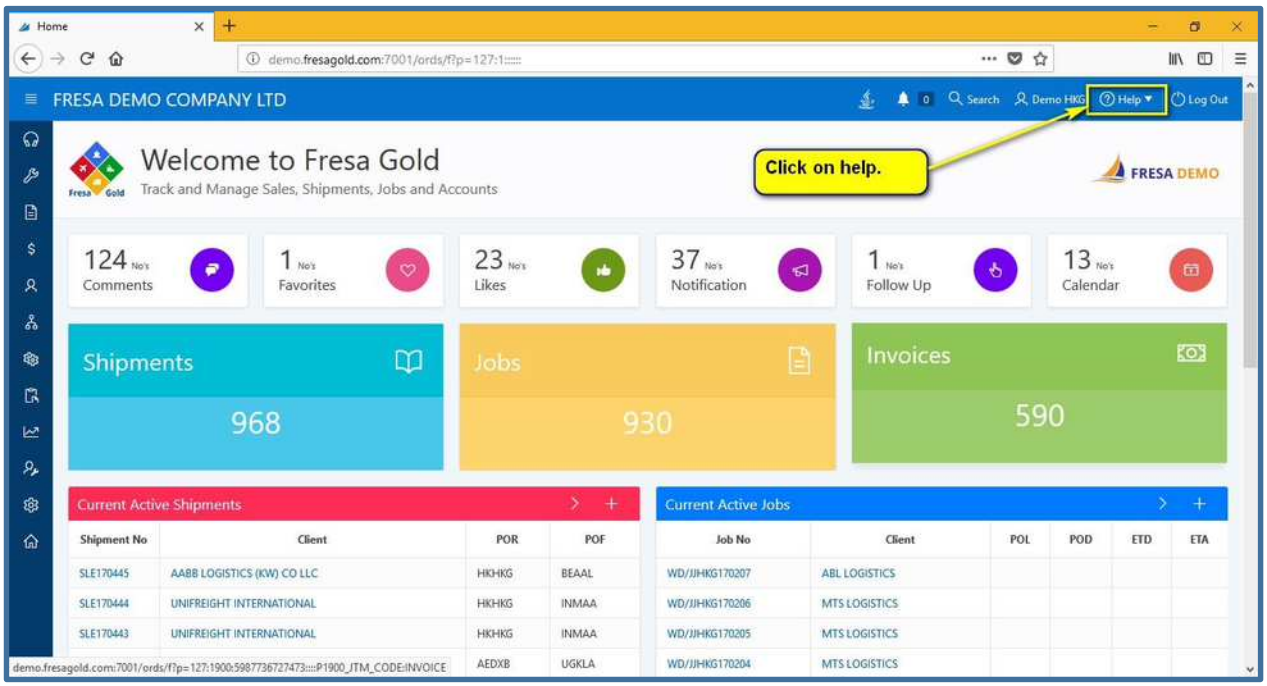


- Follow-up regarding the sales lead will be displayed on the respective date, with a remark associated with it.

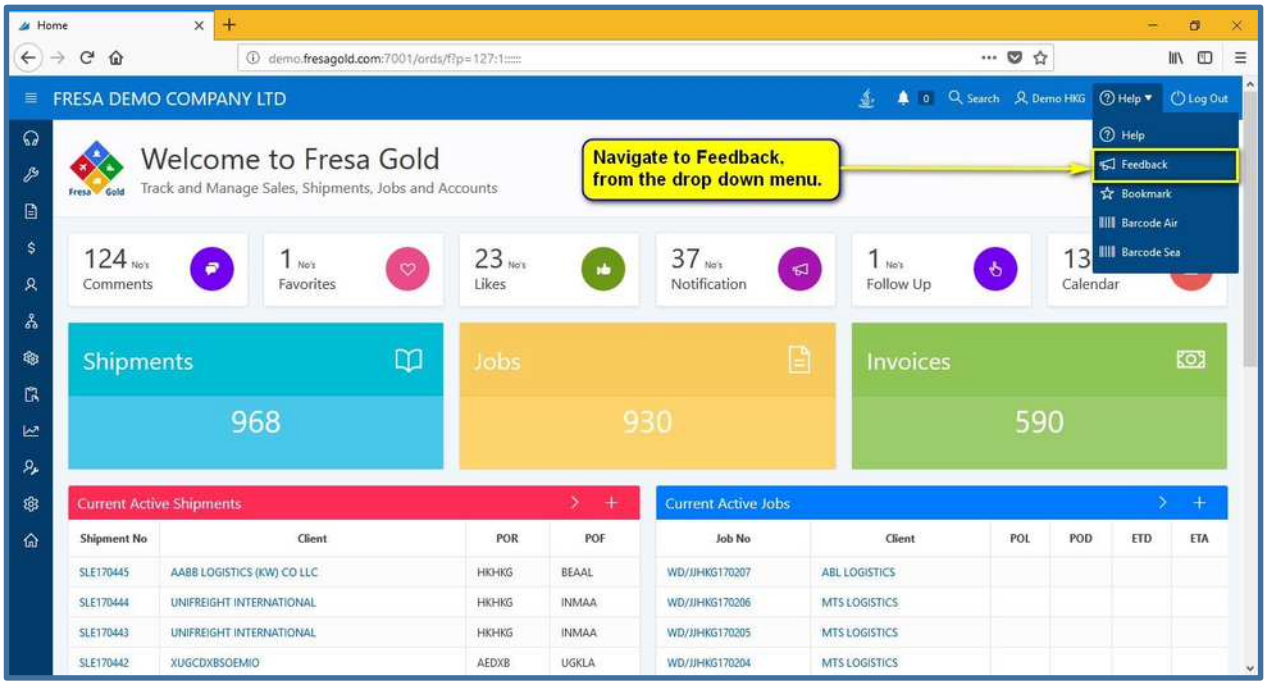


FAQ 50. How to use the feedback option effectively?

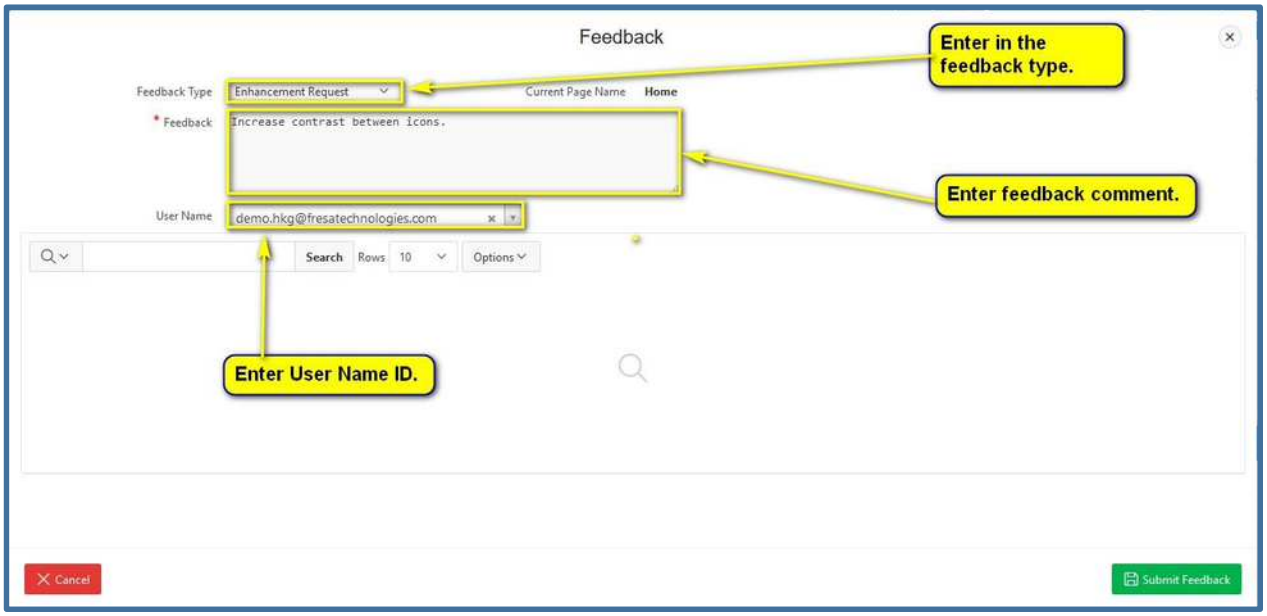
- Click on help in the dashboard.



- Then click on the Feedback option.



- FeedBack pop up Window opens



- Enter in your feedback type and the comment.
- Click on

icon. The feedback is sent directly to the developer.
- Any status change in the feedback will be resulted in the Feedback pop up Window.

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