

MoCo™ SMS Suite

Quick Guides for Direct Marketing and CRM

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Chapter 1: Introduction

1.1 Purpose

The purpose of this document is to provide a Guide for customers who are using MoCo for direct marketing and customer relationship management (CRM).

1.2 Target Audience

The target audiences of this document are all customers who will be using MoCo to perform direct marketing and/or CRM. This includes all sole proprietors, marketeers, small business owners, retailers, spa and beauty centre operators, restaurant owners, etc.

Chapter 2: Client Database Management

2.1 Export Address Book to file

The entire address book can be exported to either a csv (comma-separated values) file or a tab-delimited file. Both types of files can be opened by Microsoft Excel. You can choose which field within the database to export out.

To Export Address Book,

Step 1: From the File menu, click on the **Export Address Book**

Step 2: On the **Export Address Book** dialog, check the individual field name checkbox to select the export content. Click on the **Browse** button to select the location and file name of the saved file.

Step 3: Select the type of output file by choosing the delimiter type. You can choose either “Comma” or “Tab”.

Step 4: If you wish to include contact group information in the exported file, checked the “Include contact group information” option.

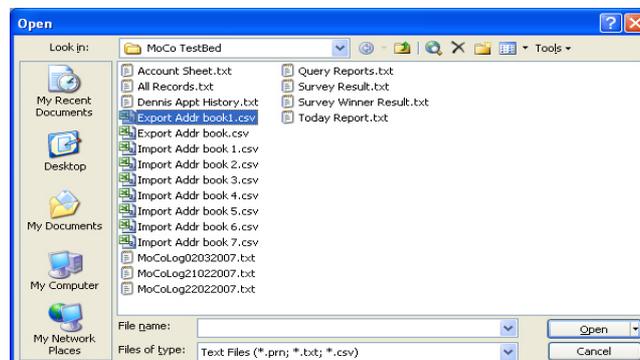
Step 5: Click **Export** button to complete operation.

2.1.1 Open Exported File using MS Excel

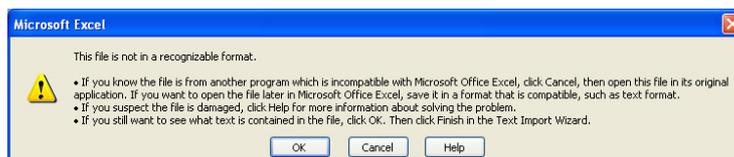
To open the exported file in MS Excel:

Step 1: Open Microsoft Excel.

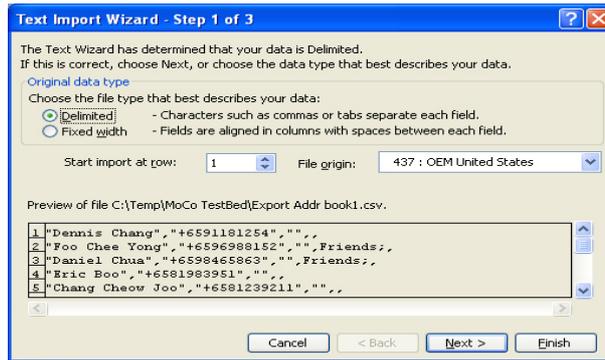
Step 2: Click “Open” under the “File” menu. A dialog box will be displayed for you to select the file to open.



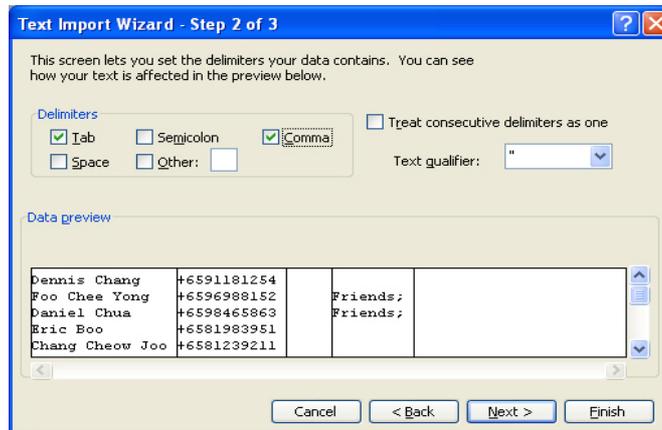
Step 3: Select the file and click “Open”. You will see a warning message box as below. Click “Ok”.



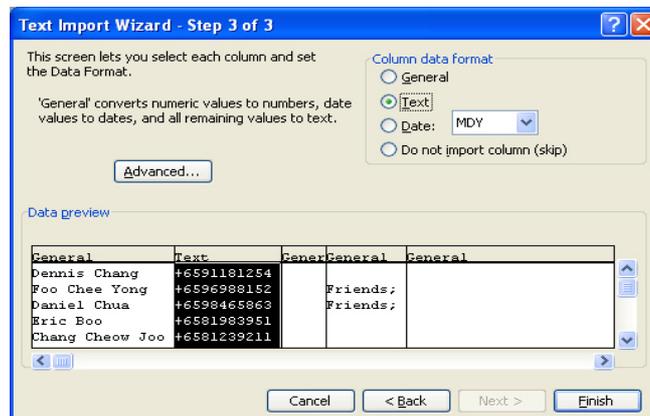
Step 4: You shall see the “Text Import Wizard – Step 1 of 3” dialog box as shown below. Make sure the “Delimited” option is selected. Click “Next” button.



Step 5: You shall see the “Text Import Wizard – Step 2 of 3” box. Make sure the “Tab” and “Comma” options are selected. Click “Next” button.



Step 6 : You shall now see the “Text Import Wizard – Step 3 of 3” box. Click on the column that represent the mobile phone numbers, and then select “Text” option under the “Column data format” selection.



Step 7: Click “Finish” button. The exported file shall be successfully loaded into Microsoft Excel. You can now save it into MS Excel format.

2.2 Import contacts into Address Book

You can import contacts information into MoCo’s Address Book. The import file can be either in csv (comma-separated-values) format, or a tab-delimited file, or a MS Excel file (*.xls).

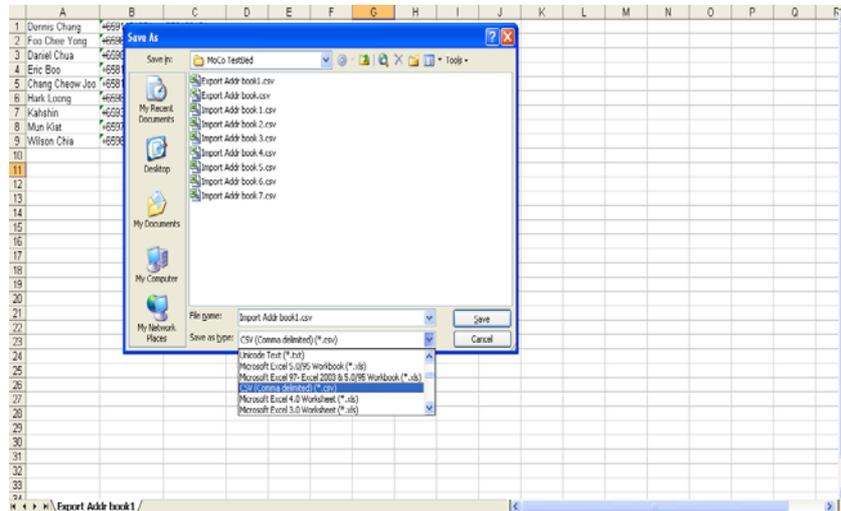
MoCo’s import function is extremely user friendly. You will be able to assign any column to import a specified field in MoCo’s address book. There is no fixed structure for importing data.

2.2.1 Prepare Import File (csv/txt) from existing database

To prepare import file (csv/txt) from your existing **Microsoft Excel** spreadsheet,

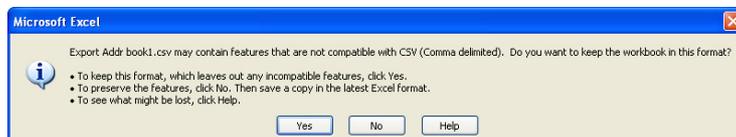
Step 1: From the File menu, select “Save As ...” option.

Step 2: A “Save As” dialog box will appear.



Step 3: Key in the file name to be saved and select the type of file to be saved. For csv file, select “CSV (comma-delimited) (*.csv)” as the file type. For tab-delimited file, select “Text (Tab-delimited) (*.txt)” as the file type.

Step 4: Click “Save” button. The below warning box may appear. Just click “Yes” button.



Step 5: The csv / txt file is saved successfully. Close the MS Excel application.

2.2.2 Prepare Import File (MS Excel) from existing database

To directly import the address book from a MS Excel sheet, you need to convert the “Mobile Number” field (and whatever number fields you have in your database) into a Text field:

Step 1: Open the existing excel file using Microsoft Excel. A sample of the excel file is shown below:

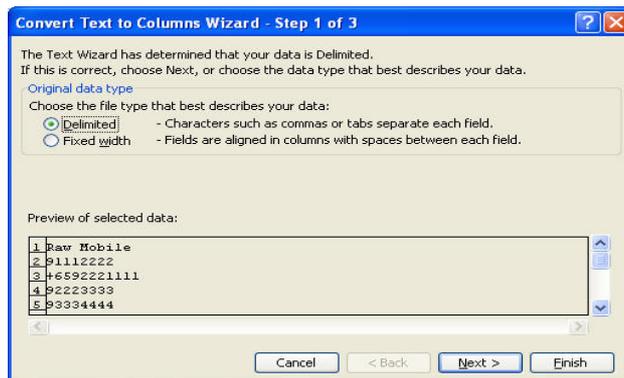
	A	B	C	D	E	F
1	Name	Raw Mobile	Address	DOB	Gender	Group
2	Chee Yong	91112222	Blk 23 Potong Pasir #04-08	11/14/1975	Male	Member
3	CSL	+6592221111	123 Eunos Road	1/20/1972	Male	Non-member
4	Dennis	92223333	Blk 3 Geylang Road #01-234.	11/12/1975	Male	Member

Step 2: Convert column B (“Raw Mobile”) into TEXT:

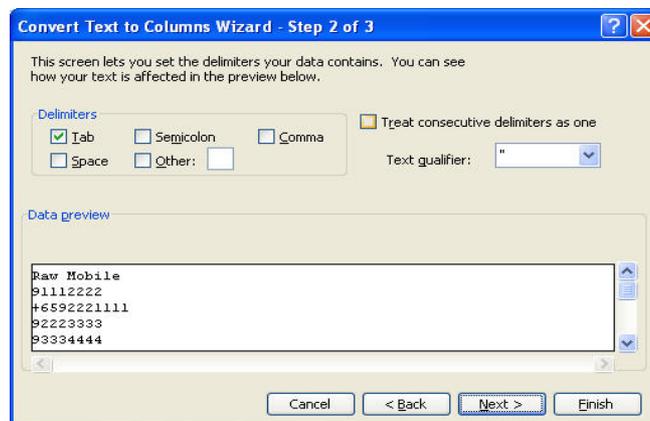
2a. Highlight the column (in this case, column B) to be converted.

2b. Select from menu, “Data -> Text to Columns ...” option.

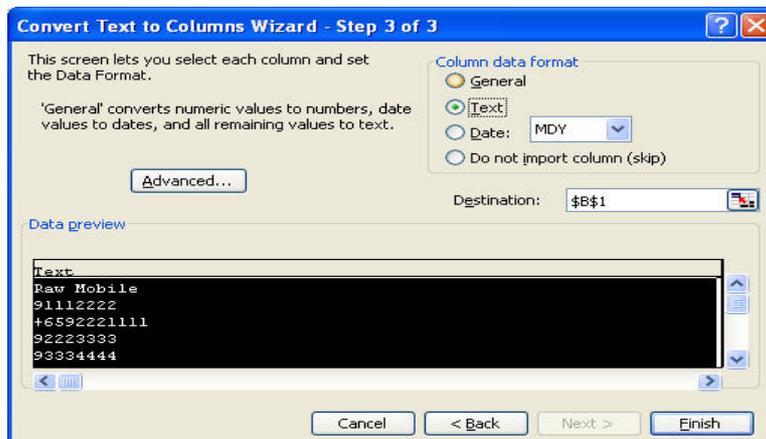
2c. The dialog box shown below will be displayed. Click the “Next” button.



2d. The dialog box shown below will be displayed. Click the “Next” button again.



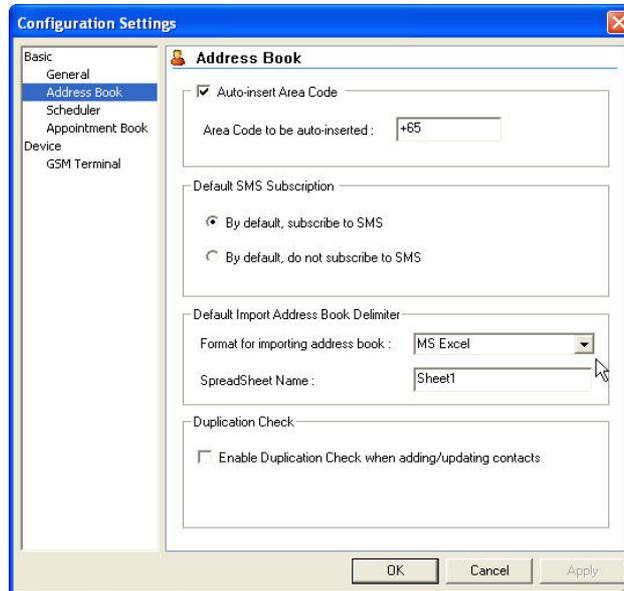
2e. The dialog box shown below will be displayed. Select “Text” and click “Finish” button.



2.2.3 Configure type of Import file

Before importing the Address Book, you need to select the type of import file that MoCo needs to import.

Step 1: At the MoCo software, select “Configuration Settings”. A dialog box as shown below will appear.



Step 2: Under “Format for importing address book”, select the type of import file you are going to import into MoCo’s address book. For MS Excel file, you will need to specify the SpreadSheet name also.

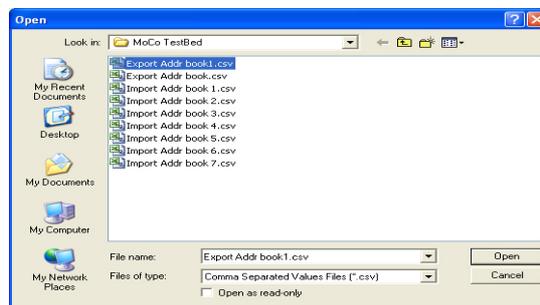
Step 3: Click “OK” button.

2.2.4 Import csv/txt/excel file into MoCo

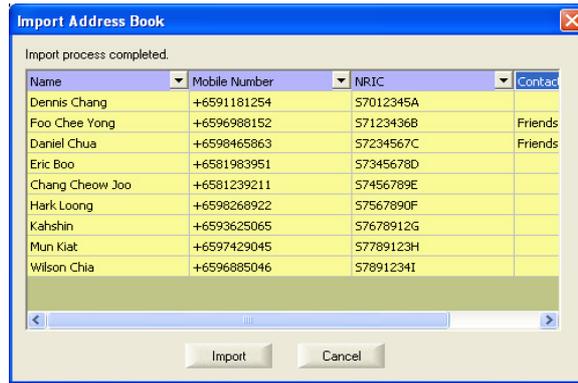
To import from csv file into address book,

Step 1: From the File menu, click on the **Import Address Book**

Step 2: From the **Open** dialog box, select the csv or txt file to import into the database. Click “Open” button.



Step 3: On the **Import Address Book** dialog, match and select the correct field of each column. If you do not select a field name above the column, that particular column will not be imported.

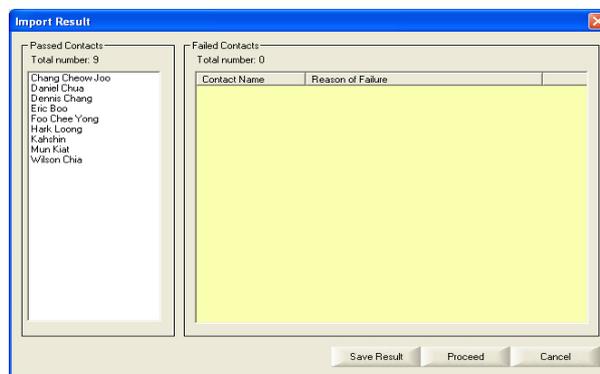


Step 4: If one of the column of your database contains the name of the contact group, you can select the option “Contact Group” for that column. For contacts who are members of multiple contact groups, the contact group names are separated by semicolons within the column.



Step 5: Click **Import** button to start importing.

Step 6: A dialog box as shown below will appear, displaying the contacts that are imported successfully and those that failed.



Step 7: To save result of the import process, click “Save Result”. The result is saved into a text document.

Step 8: To proceed with the import process, click “Proceed” button. To abort the import process, click “Cancel” button.

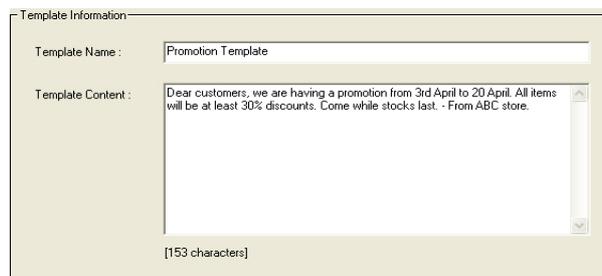
Chapter 3: Creating Templates

MoCo's Template Editor allows user to create reusable SMS messages. Frequently used SMS can be saved as template and recalled when needed. User will be able to access the created template by right-clicking of the mouse button in all "Message" text boxes, and then choosing from the options "Insert Template" or "Append Template" to include a template into the message.

To add a new template,

Step 1: Click on  button to clear Template Information area.

Step 2: Enter template information (template name and content) into respective fields.

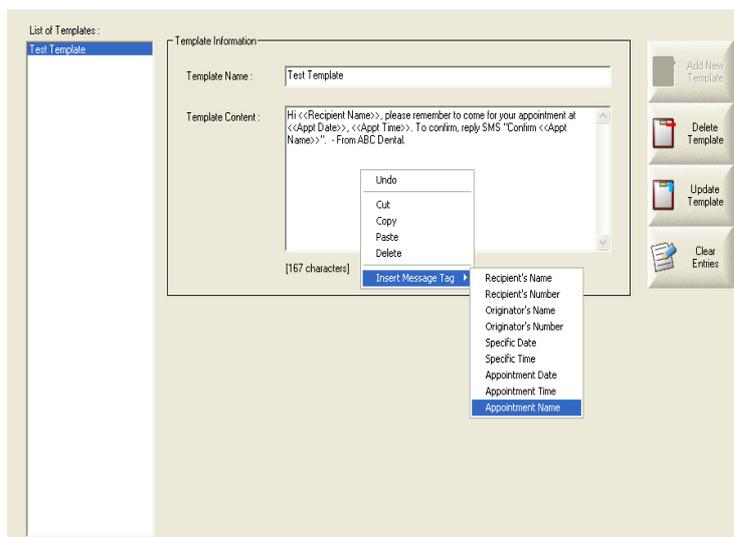


Step 3: Click on  to save template.

When a template is created successfully, the template name will appear on the List of Templates box.

3.1 Message Tags

MoCo supports the use of "Message Tags" for creating dynamic message content.



You can insert message tags into templates by right-clicking of the mouse, and then select "Insert Message Tag" to insert the appropriate message tags.

Currently, MoCo supports the use of the following message tags:

- Recipient's Name – This tag shall be used to insert the name of individual recipients at the time of sending.

- Recipient's Number – This tag shall be used to insert the mobile phone number of individual recipients at the time of sending.
- Originator's Name – This tag is only used in the “Forward to selected Recipients” action of the “Automatic Response System”. It shall insert the name of the originator of SMS into the message.
- Originator's Number – This tag is only used in the “Forward to selected Recipients” action of the “Automatic Response System”. It shall insert the mobile number of the originator of SMS into the message.
- Specific Date – This tag is only used in the Scheduler. It shall insert the specific date of the scheduled SMS sending into the message.
- Specific Time – This tag is only used in the Scheduler. It shall insert the specific time of the scheduled SMS sending into the message.
- Appointment Date – This tag is only used in the Appointment Book. It shall insert the appointment date into the message.
- Appointment Time – This tag is only used in the Appointment Book. It shall insert the appointment time into the message.
- Appointment Name – This tag is only used in the Appointment Book. It shall insert the appointment name into the message.

Chapter 4: Customer Relationship Management (CRM)

MoCo's *Event Manager* allows user to create periodic event to send SMS. With Event Manager, greeting messages like Birthday, New Year, Christmas and Anniversary can be created and SMS will be send automatically once the date is reached.

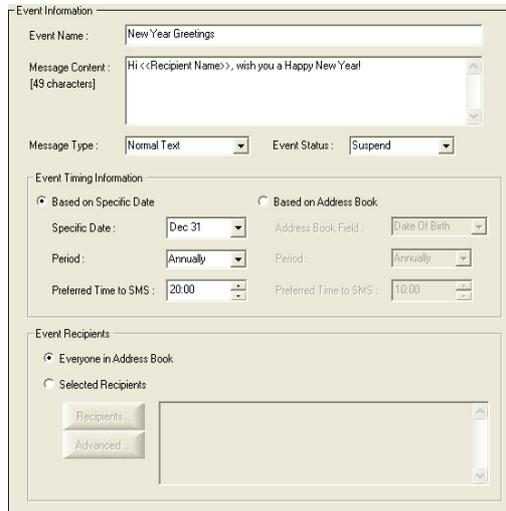
4.1 Add new Event

4.1.1 Add new Event based on Specific Date

To add a new event based on Specific Date,

Step 1: Click on  button to clear Event information area.

Step 2: Enter event information into respective fields.



The screenshot shows the 'Event Information' form with the following details:

- Event Name:** New Year Greetings
- Message Content:** Hi <<Recipient Name>>, with you a Happy New Year! (43 characters)
- Message Type:** Normal Text
- Event Status:** Suspend
- Event Timing Information:**
 - Based on Specific Date
 - Based on Address Book
 - Specific Date:** Dec 31
 - Address Book Field:** Date Of Birth
 - Period:** Annually
 - Preferred Time to SMS:** 20:00
- Event Recipients:**
 - Everyone in Address Book
 - Selected Recipients

- Event Name – Enter a name for the event.
- Message Content – The SMS content to be sent when the event's date is reached. You can use template and message tags here also.
- Message Type – Indicate the type of message to be sent. Options are “Normal”, “8-Bit Data” and “Unicode (Chinese Text)”.
- Event Status – Suspend or Active. If event status is “Suspend”, sms will not be sent even if the event's date is reached.
- Specific Date – The date at which the sms will be sent.
- Period – Annually or Monthly. In above example, if “Annually” is selected, the sms will be sent out every year on 31st December. If “Monthly” is selected, the sms will be sent out on the 31st of every month.
- Preferred time to SMS – Indicate the preferred time of the day to send out sms. SMS will only be sent out when both the event's date and the preferred time is reached.
- Everyone in Address Book – Select this option if the sms is to be sent to everyone within the Address Book.
- Selected Recipients – Select this option if you only want to send event sms to selected recipients. You can use the Advanced Search Engine for selection of recipients, or simply select from a list of contacts and/or contact groups.

Step 3: Click on  to save event.

When an event is created successfully, the event name will appear

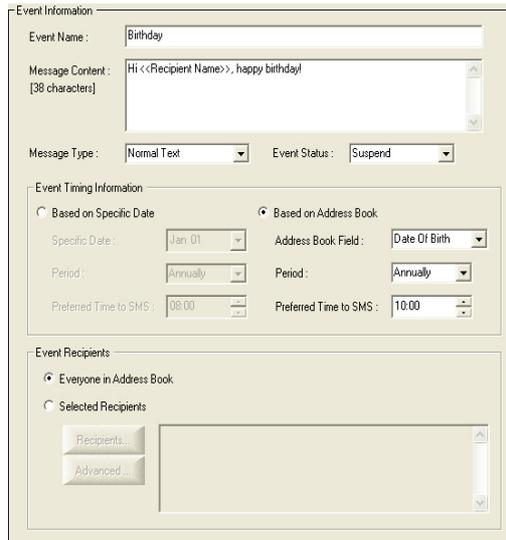
on the List of Events box.

4.1.2 Add new Event based on Address Book

To add a new event based on Address Book,

Step 1: Click on  button to clear Event information area.

Step 2: Enter event information into respective fields.



The screenshot shows a dialog box titled "Event Information" with the following fields and options:

- Event Name:** Birthday
- Message Content:** Hi <<Recipient Name>>, happy birthday! (38 characters)
- Message Type:** Normal Text
- Event Status:** Suspend
- Event Timing Information:**
 - Based on Specific Date
 - Based on Address Book
 - Specific Date:** Jan 01
 - Address Book Field:** Date Of Birth
 - Period:** Annually
 - Preferred Time to SMS:** 08:00
- Event Recipients:**
 - Everyone in Address Book
 - Selected Recipients
 - Buttons: Recipients..., Advanced...

- Event Name – Enter a name for the event.
- Message Content – The SMS content to be sent when the event’s date is reached. You can use template and message tags here also.
- Message Type – Indicate the type of message to be sent. Options are “Normal”, “8-Bit Data” and “Unicode (Chinese Text)”.
- Event Status – Suspend or Active. If event status is “Suspend”, sms will not be sent even if the event’s date is reached.
- Address Book Field – Select the field of the Address Book on which the event is based. In the above example, the event is based on the “Date of Birth” field of the Address Book.
- Period – Annually or Monthly. In above example, if “Annually” is selected, sms will be sent out every year on the birthday of the customer. If “Monthly” is selected, sms will be sent out on the day of the “Date of Birth” every month.
- Preferred time to SMS – Indicate the preferred time of the day to send out sms. SMS will only be sent out when both the event’s date and the preferred time is reached.
- Everyone in Address Book – Select this option if the sms is to be sent to everyone within the Address Book.
- Selected Recipients – Select this option if you only want to send event sms to selected recipients. You can use the Advanced Search Engine for selection of recipients, or simply select from a list of contacts and/or contact groups.

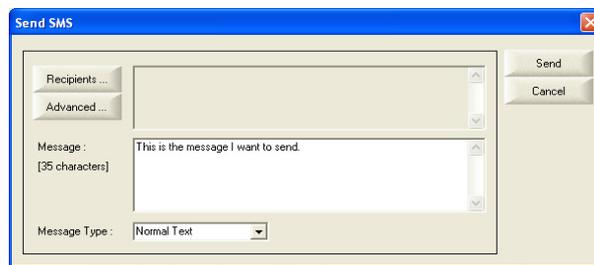
Chapter 5: Targeted Direct Marketing

MoCo can be used to targeted direct marketing, that is, broadcasting sms to customers who most probably are interested in your products / services.

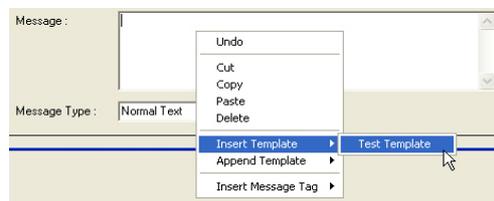
To perform targeted direct marketing,

Step 1: From “Tools” menu, select “Send SMS” option. You can also click the  button on the toolbar alternatively.

Step 2: A dialog box as shown below will appear. Type in the message you want to send in the message box provided. The text on the left indicates the number of characters within the message. For “Normal Text” message, one SMS allows 160 characters. For “Unicode (Chinese Text)” message, one SMS allows 70 characters. If the number of characters exceeds the limit, it shall be broken into multiple SMSes before sending out.



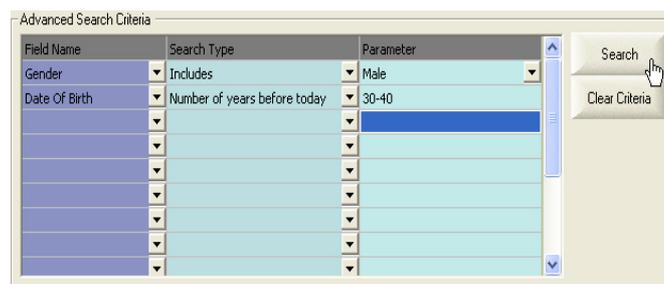
Step 3: Alternatively, you can select from a list of message templates by right-clicking the mouse inside the message box. A context box will appear. Move the mouse to “Insert Template” option to select a pre-defined message template.



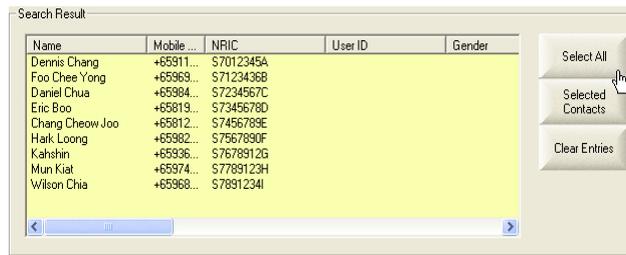
Step 4: Select the Message Type of the message you wish to send. If your message contains chinese text, you must select “Unicode (Chinese Text)” option.

Step 5: Click the “Advanced” button.

Step 6: The “Advanced Recipient Selection” dialog box will appear. In this dialog box, you can enter your search query (see chapter 3 Search Engine of MoCo User Manual), and then click “Search” button to retrieve the search result. For example as shown below, you can target your SMS recipients to be males who are between 30 to 40 years old.

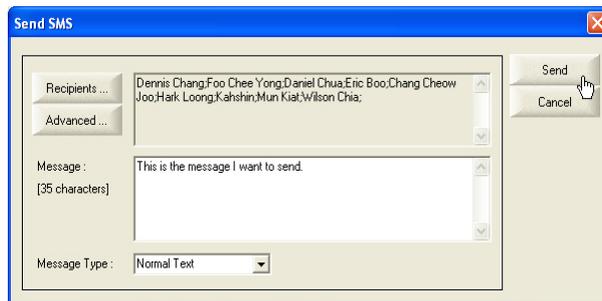


Step 7: Upon clicking the “Search” button, the result shall be displayed on the lower portion of the dialog box.



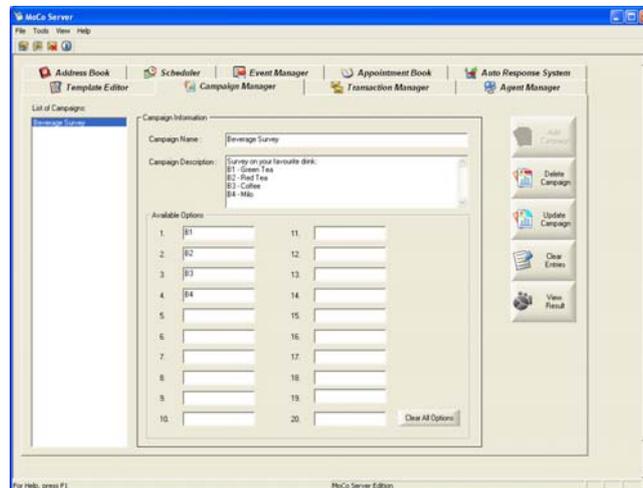
Step 8: Click “Select All” button to select all the contacts retrieved from the search. You can also select a few of the contacts by pressing “Ctrl” key and click on their individual names, then click “Selected Contacts” button.

Step 9: Click “Send” button to send the SMS.



Chapter 6: Create a Marketing Campaign

MoCo's Campaign Manager allows user to create SMS campaigns such as voting, contest or survey. With Campaign Manager, you can create your own e-campaign to consolidate sms feedbacks or surveys in the form of graphical representation.

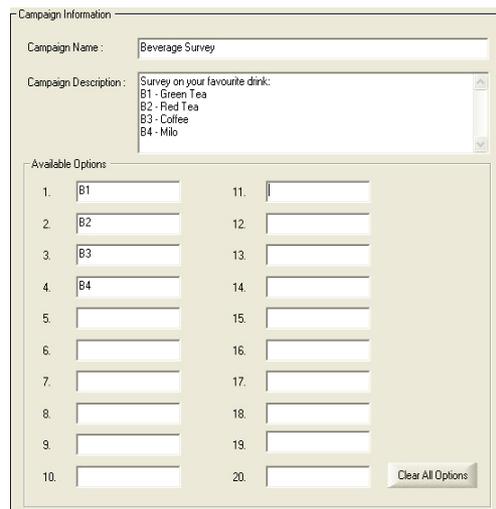


6.1 Add new Campaign

To add a new campaign,

Step 1: Click on  button to clear Campaign information area.

Step 2: Enter campaign information into respective fields.

This is a close-up view of the 'Campaign Information' form. It contains three main sections: 'Campaign Name' with a text input field containing 'Beverage Survey'; 'Campaign Description' with a text area containing 'Survey on your favourite drink: B1 - Green Tea, B2 - Red Tea, B3 - Coffee, B4 - Milo'; and 'Available Options' which is a grid of 20 input fields. The first four fields in the first column contain 'B1', 'B2', 'B3', and 'B4'. A 'Clear All Options' button is located at the bottom right of the grid.

- Campaign Name – Enter a name for the campaign
- Campaign Description – Text description on the campaign
- Available Options – Enter the acceptable code names (Eg. B1, B2, B3, B4) for the campaign. Each code name represent a particular selection, in this case for the Beverage Survey, B1 represent Green Tea, B2 represent Red Tea, etc.

Step 3: Click on  to save the campaign.

When a campaign is created successfully, the campaign name will appear on the List of Campaigns box.

6.2 Delete Campaign

To delete a campaign,

Step 1: From the List of Campaigns box, select the campaign to be deleted by clicking on the campaign name. A blue highlight will appear.

Step 2: Click on  to delete the highlighted campaign.

6.3 Updating Campaign

To update an campaign,

Step 1: Select the campaign to be updated from the List of Campaigns box.

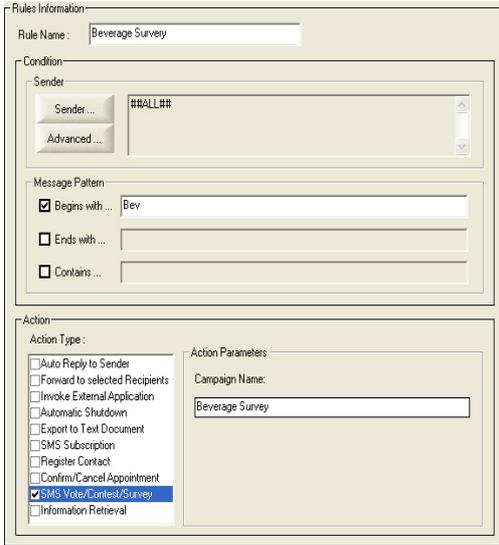
Step 2: Replace the information to be updated.

Step 3: Click on  to save the changed information.

6.4 How it Works

6.4.1 Create an ARS Rule

After you have created a campaign using the Campaign Manager, the next thing to do is to create a rule for that campaign using the *Automatic Response System*.



The screenshot shows the 'Rules Information' dialog box for a campaign named 'Beverage Survey'. The dialog is divided into three main sections: Condition, Message Pattern, and Action.

- Condition:**
 - Sender:** A text field containing '##ALL##'.
 - Message Pattern:** Three checkboxes are present: 'Begins with ...' (checked), 'Ends with ...', and 'Contains ...'. The 'Begins with ...' field contains 'Bev'.
- Action:**
 - Action Type:** A list of actions with checkboxes. 'SMS Vote/Cancel/Survey' is selected.
 - Action Parameters:** A 'Campaign Name' field containing 'Beverage Survey'.

Following the example on the Beverage Survey, you can now go to the Automatic Response System page and create a new rule called "Beverage Survey" (or any other name you prefer).

Select “All” for the sender condition and “Begin with: Bev” as the message pattern condition, as shown in above screen shot.

Select the “SMS Vote/Contest/Survey” action and key in “Beverage Survey” as the campaign name. Once all these information is keyed in, you can add the new rule to the system.

6.4.2 Wait for incoming SMS

Once you have created the campaign and its corresponding rule, the only thing you need to do is to wait for incoming sms.

For example, the following message content would be considered as a valid vote for this campaign:
“Bev B2”

When MoCo received the above-mentioned sms, it would consider it as a valid vote for the campaign “Beverage Survey”, as a vote towards the option “Red Tea”.

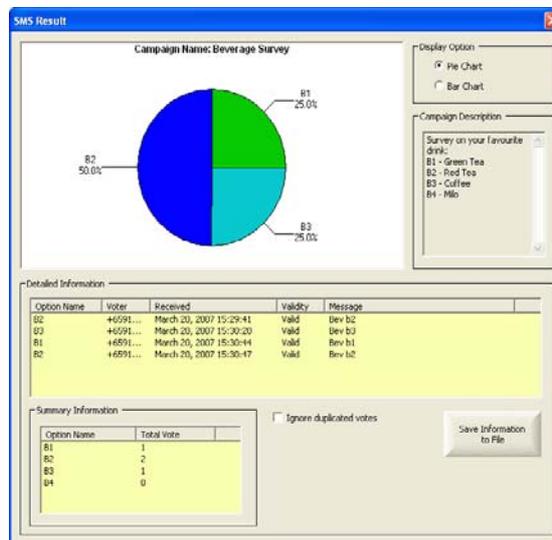
6.4.3 View Campaign Result

To view the result of a particular campaign,

Step 1: Select the campaign from the List of Campaigns box.

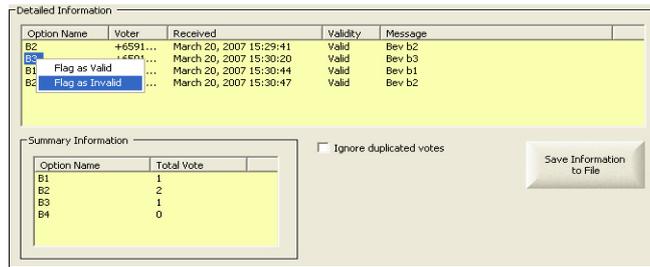
Step 2: Click on  to view the result of the campaign.

Step 3: A dialog box will appear, displaying the result of the campaign.



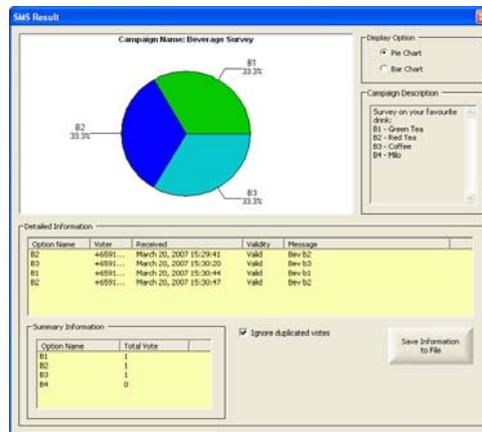
The top portion of the dialog box will show the graphical representation of the campaign result. The lower portion will show the detailed information of each votes.

Under the “Detailed Information”, a context box will appear if you right-click the mouse on any of the vote:



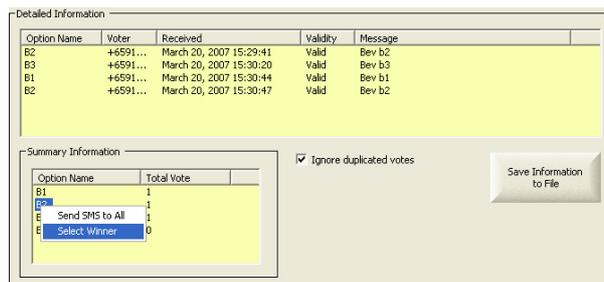
- Flag as Valid – Select this option to flag this particular vote as a valid vote.
- Flag as Invalid – Select this option to flag this particular vote as an invalid vote.

The option “Ignore duplicated votes” can be used to ignore multiple votes on the same item from the same mobile phone number. This option is useful if one wishes to implement a one-man-one-vote system.



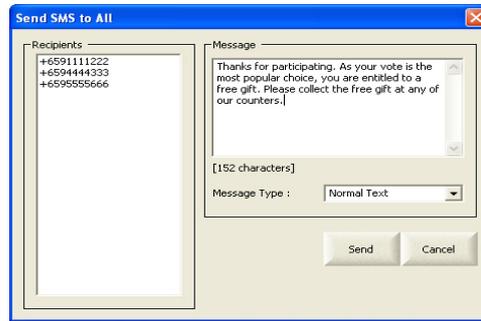
To save the campaign result to a file, click the “Save Information to File” button.

6.4.4 Making use of Campaign Result



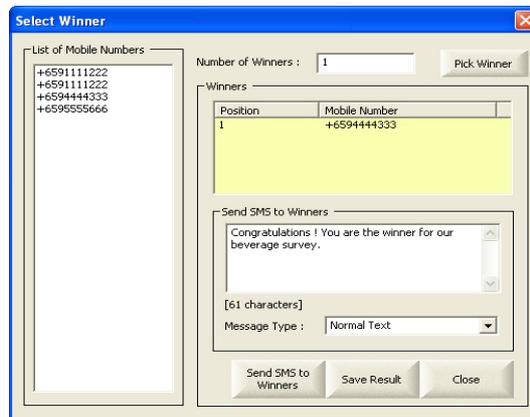
Under “Summary Information”, you can right-click the mouse on any option name and a context box will appear.

- Send SMS to All



A dialog box as shown above will appear for you to send SMS to all the voters who have selected the option.

- Select Winner



A dialog box as shown above will appear for you to select winner(s) from a list of voters who selected the option.

Simply enter the number of winners and click “Pick Winner” button to randomly select a winner(s).

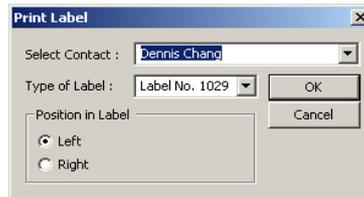
Upon selecting the winner, you can also send a message to the winner(s) by keying in the message and then clicking the “Send SMS to Winners” button.

Chapter 7: Other Features

7.1 Label Printing

MoCo allows user to perform label printing on standard label type 1029.

To perform label printing, select “Print Label” from the File menu. A dialog box as shown below will appear.



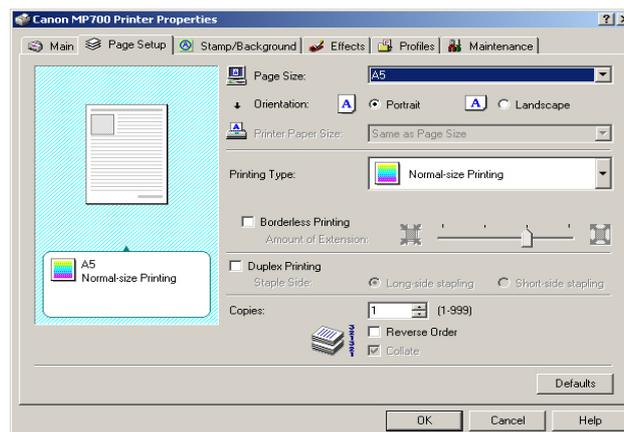
Step 1: Select the contact who you wish to print the label of.

Step 2: Make sure the type of label is “Label No. 1029”.

Step 3: Select the position within label for printing. Click “OK”. The below Print dialog box will appear.



Step 4: Select the appropriate printer name. Click “Properties” button to set the paper size.



Step 5: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 6: Go to Page Setup and set the Page Size to “A5”.

Step 7: Click “OK”. You will return to the previous Print dialog box.

Step 8: Click “OK” to proceed with the printing.

7.2 Receipt Printing

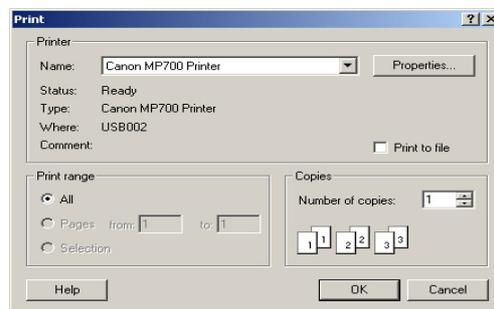
MoCo allows user to perform receipt printing on 'A5' size paper.

To perform receipt printing, select "Print Receipt" from the File menu. A dialog box as shown below will appear.

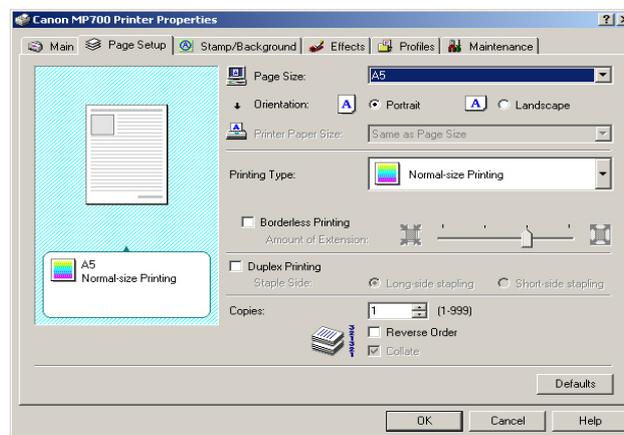


Step 1: Enter the reference number of the account you want to print.

Step 2: Click "OK". The below Print dialog box will appear.



Step 3: Select the appropriate printer name. Click "Properties" button to set the paper size.



Step 4: A dialog box as shown above will appear. Note that for different printer, a different kind of dialog will appear.

Step 5: Go to Page Setup and set the Page Size to "A5".

Step 6: Click "OK". You will return to the previous Print dialog box.

Step 7: Click "OK" to proceed with the printing.

7.3 Accounts System

MoCo has a built-in Accounts System for user to perform some simple accounting tasks.

To invoke the Accounts System, select “Accounts System” from the Tools menu. A dialog box as shown below will appear.

The screenshot shows the 'Accounts System' dialog box. On the left, there are 'Display Options' (Today's Transaction, Current Month's Transaction, Customized Period) and 'Other Options' (Payment Type: All, Account Type: Products, Services). The main area is a table with columns: Ref. No., Date, Client Name, Type, Description, and Amt Paid. Below the table are balance fields: Morning Balance (0.00), Afternoon Balance (140.00), Night Balance (0.00), and Total Balance (140.00). Buttons at the bottom include Search, Add New Transaction, Settings, and Save Accounts Sheet.

Ref. No.	Date	Client Name	Type	Description	Amt Paid
REF00000004	August 07, 2007 13:32:10	Peter Tan	Products	Something ABC	25.00
REF00000004	August 07, 2007 13:32:10	Peter Tan	Products	Something DEF	35.00
REF00000004	August 07, 2007 13:32:10	Peter Tan	Services	Consultation A	30.00
REF00000004	August 07, 2007 13:32:10	Peter Tan	Services	Consultation B	50.00

7.3.1 Add New Transaction

Step 1: Click “Add New Transaction” button. A dialog box as shown below will appear.

The screenshot shows the 'Add Accounts Record' dialog box. It has 'Account Information' fields: Reference No. (REF00000005), Assistant Name (Eddy), Client / Supplier (John Chan), Remarks (empty), Payment Type (Cash), and Last Modified (empty). Below is a table with columns: Type, Description, and Amount Paid. Buttons at the bottom are Save and Cancel.

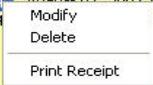
Type	Description	Amount Paid
Products	ABC	50
Services	Type XYZ	100

Step 2: Key in the accounts information. For expenses, you can add a minus sign in front of the Amount Paid value.

Step 3: Click “Save” button to add the account.

7.3.2 Manage existing account items

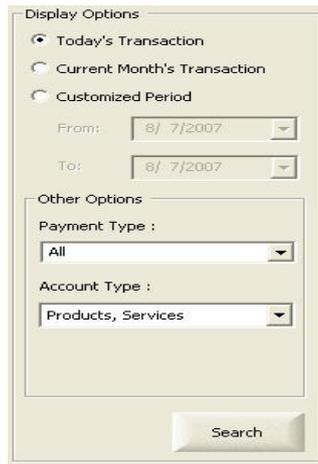
Ref. No.	Date	Client Name	Type	Description	Amt Paid
REF0000004	August 07, 2007 13:32:10	Peter Tan	Products	Something ABC	25.00
REF0000004	August 07, 2007 13:32:10	Peter Tan	Products	Something DEF	35.00
REF0000004	August 07, 2007 13:32:10	Peter Tan	Services	Consultation A	30.00
REF0000004	August 07, 2007 13:32:10	Peter Tan	Services	Consultation B	50.00



To manage existing account item, right-click on the item and a context menu will appear for the following options:

- Modify – Select this option to modify the information of the account item.
- Delete – Select this option to delete the account item.
- Print Receipt – Select this option to print receipt for this account item. Remember to set the paper size as 'A5'.

7.3.3 Query Account System

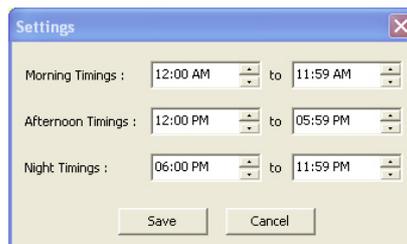


The 'Display Options' dialog box contains the following elements:

- Three radio buttons: 'Today's Transaction' (selected), 'Current Month's Transaction', and 'Customized Period'.
- Two date pickers: 'From:' (8/ 7/2007) and 'To:' (8/ 7/2007).
- An 'Other Options' section with two dropdown menus: 'Payment Type:' (All) and 'Account Type:' (Products, Services).
- A 'Search' button at the bottom.

At the Display Options, select the query parameters and click “Search” button. The list of account items that satisfy the query parameters will be displayed, together with the calculated balances.

7.3.4 Accounts Settings



The 'Settings' dialog box contains the following elements:

- Three time range settings, each with a start and end time picker:
 - Morning Timings : 12:00 AM to 11:59 AM
 - Afternoon Timings : 12:00 PM to 05:59 PM
 - Night Timings : 06:00 PM to 11:59 PM
- 'Save' and 'Cancel' buttons at the bottom.

By clicking the Settings button on the Accounts System dialog box, the above dialog box will appear. You can set the individual timings and click Save button. The timings shall affect the calculations of individual balances.

7.3.5 Save Accounts Sheet

By clicking the “Save Account Sheet” button on the Accounts System dialog box, you can save the currently displayed account sheet to a HTML file.