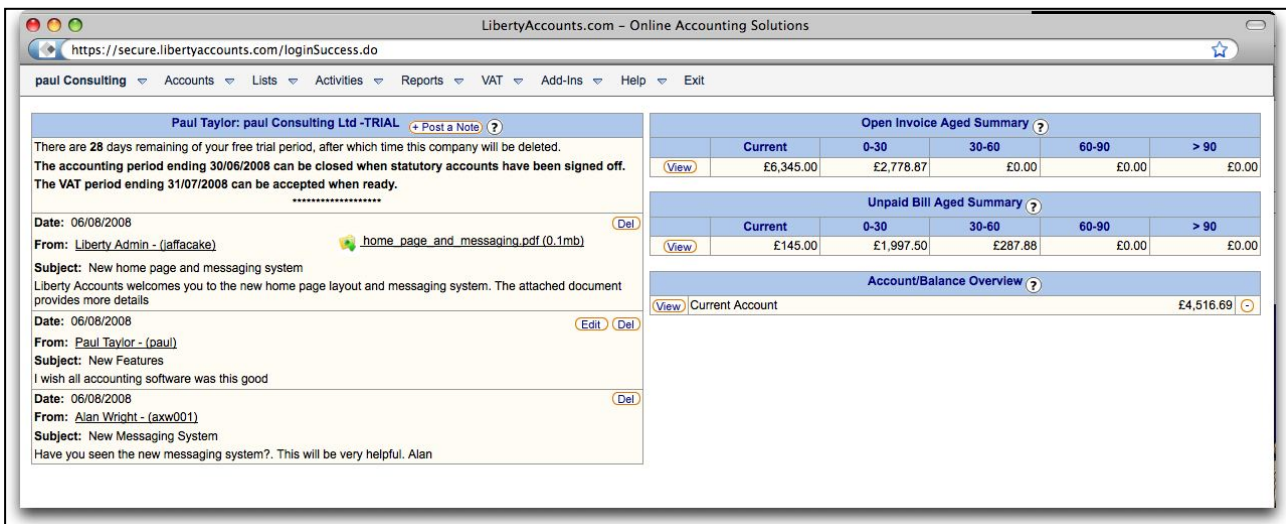


Home Page and Messaging

Overview

The home page for any entity has two major display areas. The right hand side shows the status of open invoices and unpaid bills together with the financial balance of selected accounts.

The left hand side is an internal messaging system allowing users to post messages and in some cases attach a file which are then visible to all the other entity users.



The screenshot shows the LibertyAccounts.com interface for 'paul Consulting'. The top navigation bar includes: paul Consulting, Accounts, Lists, Activities, Reports, VAT, Add-Ins, Help, and Exit. The main content area is split into two columns.

Left Column (Messaging):

- Header:** Paul Taylor: paul Consulting Ltd -TRIAL (Post a Note ?)
- Alert:** There are 28 days remaining of your free trial period, after which time this company will be deleted. The accounting period ending 30/06/2008 can be closed when statutory accounts have been signed off. The VAT period ending 31/07/2008 can be accepted when ready.
- Message 1:**
 - Date: 06/08/2008
 - From: Liberty Admin - (jaffacake)
 - Subject: New home page and messaging system
 - Content: Liberty Accounts welcomes you to the new home page layout and messaging system. The attached document provides more details.
 - Attachment: home_page_and_messaging.pdf (0.1mb)
- Message 2:**
 - Date: 06/08/2008
 - From: Paul Taylor - (paul)
 - Subject: New Features
 - Content: I wish all accounting software was this good
- Message 3:**
 - Date: 06/08/2008
 - From: Alan Wright - (axw001)
 - Subject: New Messaging System
 - Content: Have you seen the new messaging system?. This will be very helpful. Alan

Right Column (Financials):

- Open Invoice Aged Summary:**

	Current	0-30	30-60	60-90	> 90
(View)	£6,345.00	£2,778.87	£0.00	£0.00	£0.00
- Unpaid Bill Aged Summary:**

	Current	0-30	30-60	60-90	> 90
(View)	£145.00	£1,997.50	£287.88	£0.00	£0.00
- Account/Balance Overview:**

(View)	Current Account	£4,516.69
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Open Invoices and Unpaid Bills

An aged analysis of both open sales invoices and unpaid bills highlights clearly the status of the entity with respect to monies it should be expecting to receive and owes. Clicking on the **VIEW** button takes the user to the detail listing of all the transactions making up the aged analysis.

The Account Balance Overview displays, for the selected accounts, the current balance if it is a balance sheet account and allows the preparation of a quick transaction report if it is a profit and loss account.

To display an account on the overview go to the **ACCOUNTS** menu.

ACCOUNTS → **ALL** (or the account type group) → **+** adjacent to the account required

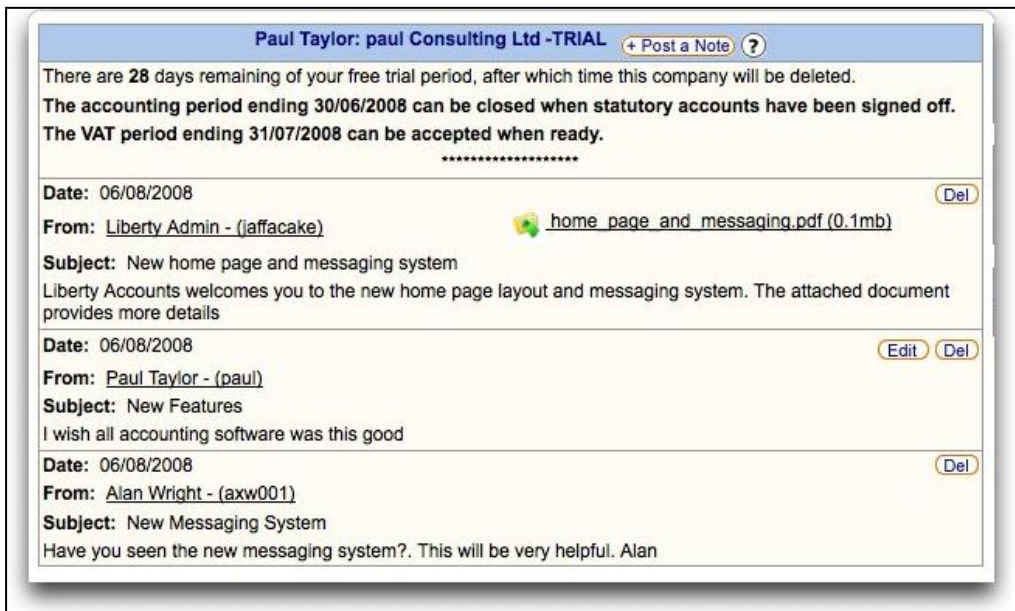
It is recommended that a regular review of the open invoice and unpaid bill situation is undertaken.

The Message Board

The left hand side of the home page displays messages from other users of the entity as well as some alerts from the system and if you're the client of a Liberty Accounts partner there may be a broadcast message from your advisor.

It is important to note that the purpose of the message board system is to provide a quick and easy method of leaving messages for other users. Whilst it has many features of an email system it is not a full system. **IT DOES NOT STORE MESSAGES.** When a user posts a message they select a lifetime period of up to 40 days. At the end of the lifetime the message is deleted from every user.

The Message Board Layout



The screenshot shows the message board interface for Paul Taylor at paul Consulting Ltd -TRIAL. At the top, there is a '+ Post a Note ?' button. Below this, there are three distinct message sections:

- System Alerts:** A blue header bar contains the text: "There are 28 days remaining of your free trial period, after which time this company will be deleted. The accounting period ending 30/06/2008 can be closed when statutory accounts have been signed off. The VAT period ending 31/07/2008 can be accepted when ready." followed by a line of asterisks.
- Broadcast message:** A message from Liberty Admin - (jaffacake) dated 06/08/2008. The subject is "New home page and messaging system" and it includes an attached PDF document named "home_page_and_messaging.pdf (0.1mb)".
- User message:** A message from Paul Taylor - (paul) dated 06/08/2008. The subject is "New Features" and the text says "I wish all accounting software was this good".
- Message from other user:** A message from Alan Wright - (axw001) dated 06/08/2008. The subject is "New Messaging System" and the text says "Have you seen the new messaging system?. This will be very helpful. Alan".

Each message section includes a 'Del' button for deletion. The broadcast message also has an 'Edit' button.

The default email system for the user is easily accessed from the message board. Simply click on the highlighted **From:** name and the default email system on the users PC is started with the **From:** name pre-populated into the emails' address box and the subject heading taken from the message.

System Alerts

The top box of the message board provides two system alerts:

- ◆ Accounting Period has ended and therefore can be closed when ready
- ◆ VAT period has ended and therefore the VAT100 can be accepted when ready.

Note it remains the responsibility of the user(s) to respond appropriately to the alerts.

Broadcast Message

If the system is provided to you in conjunction with your Advisor then messages including attachments may be sent by your Advisors to all of their clients. These messages are broadcasted to all and visible to all for the lifetime selected by the Advisor.

Recipient users can delete the message by clicking the **DEL** button. No broadcast reply is possible.

If there is an attachment click the link to load it. Note the user may need to ensure that they have the host package necessary to read the attachment i.e. Excel, Word, Adobe etc.

Messages from Other Users

An entity user can post a message on the board. The message will be visible to all other users of the entity. Recipient users can reply either as a message, which is visible to all users, or if preferred reply as an email by clicking the **From:** name (See note above) The user can also delete the message by clicking the **DEL** button.

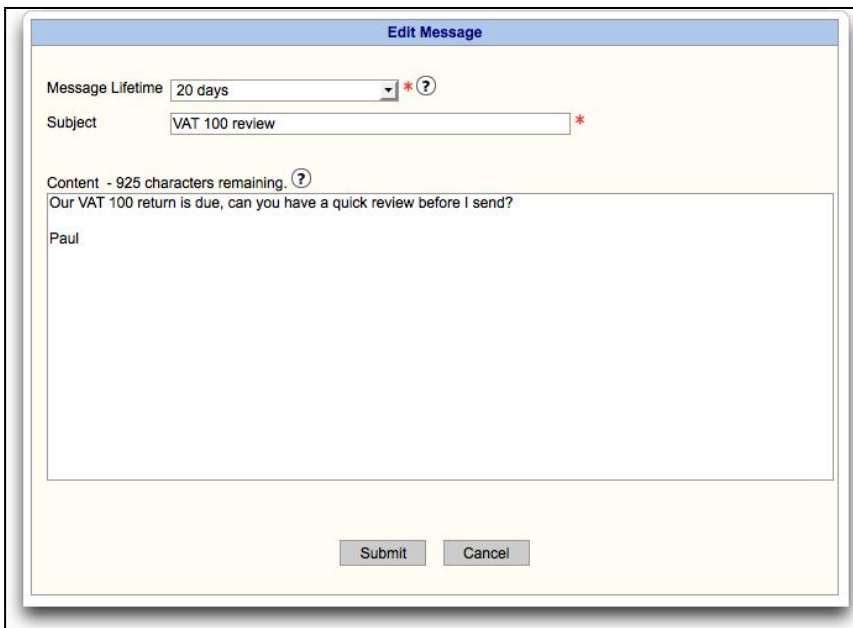
If there is an attachment click the link to load it. Note the user may need to ensure that they have the host package necessary to read the attachment i.e. Excel, Word, Adobe etc.

User Message

A copy of any message posted by the user is displayed and in addition to being able to delete the message by clicking the **DEL** button; the message by be edited by clicking the **EDIT** button.

Creating a Message

To post a new message simply click the **+ Post a Note** button in the message board header. A screen is presented.



Select the **Message Lifetime** from the dropdown. Enter a **Subject** and type your message in the **Content** area.

Click **SUBMIT** to post the message. **CANCEL** will exit the screen with no action taken.

Staff users of Advisors can add an attachment, in which case a browse for file option is available. The maximum file size is 2.5mb. If the wrong file has been attached to the message it will be necessary to delete the message and re do it attaching the correct file.