

The screenshot shows the 'Task Maintenance' window with the following details:  
 Task No.: 000000005 Desc: Call to discuss quote  
 Customer No.: 01-ABF American Business Futures Status: Not Started  
 Contact Code: ARTIE JOHN Artie Johnson Priority: High  
 Activity: Call User: GLK Ginger Kittinger  
 Reference: Follow-Up Assigned By: GLK Ginger Kittinger  
 Milestone: [blank] Opportunity: [blank]  
 Profile Link: [checkbox] Code: [blank] Last Sales Activity: [blank]  
 S/O Link: [checkbox] Order: [blank] Salesperson: [blank] Time Zone: [blank]  
 Telephone: (414) 655-4787 Ext: 219 E-Mail Addr: tracya@blytheco.com PST  
 Entered Date: 06/21/04 Entered Time: 4:05 PM Profile Note: [blank] Sales Notes: [blank]  
 Scheduled Date: 06/21/04 Start Time: 4:15 PM Stop Time: 4:15 PM Customer Maint: [blank]  
 Reminder: [checkbox] Customer Service: [blank]  
 Reminder Date: 06/28/04 Reminder Time: 4:15 PM Fax/Email: [checkbox]  
 Buttons: Outlook App, Accept, Cancel, Delete

Not Started  
Not Started  
In Progress  
Completed

Medium High  
Low  
Medium Low  
Normal  
Medium High  
High

Buttons will vary depending upon which modules and enhancements you have installed.

**New Feature:** Create Appointments for your Outlook Calendar right from the Task Maintenance screen.

The screenshot shows the 'Appointment' window with the following details:  
 Subject: 01-ABF \* American Business Futures \* (414) 655-4787  
 Location: Blytheco This is an online meeting using: Microsoft NetMeeting  
 Start time: Mon 6/28/2004 4:15 PM All day event: [checkbox]  
 End time: Mon 6/28/2004 5:15 PM  
 Reminder: [checkbox] 2 hours Show time as: Busy  
 Call to discuss quote

The screenshot shows the 'Task Notes Maintenance' window with a note:  
 Date: 02/11/2002 User: GLK Subject: Follow Up Call  
 Memo: 02/11/2002 2:38 PM GLK Stephen has one more question about imports before they sign proposal.

**Progressive Notes** keep track of details as you progress through the task.

Comp	Task No.	Customer No.	Contact	Phone	Description	Rem. Date	Rem. Time	Status
ABC	000000001	01-ABF	Artie Johnson	(414) 655-4787	Call to follow-up aft...	04/24/2003	2:00 PM	Not S
ABC	000000002	01-SHEPARD	Alan Shepard	(414) 445-6544	Call to discuss upgr...	04/24/2003	12:00 PM	Not S
ABC	000000003	02-AUTOCR	Max Johnson	(714) 675-0101	Go onsite to install ...	04/25/2003	8:00 AM	Not S

Buttons: Chg Delay, Select, Snooze, Dismiss, Cust List, Exit

**Real-Time Task Reminder** lists your Tasks and has buttons to Open the Task, Snooze the Reminder or Dismiss the Reminder. You set the amount of time the system waits to refresh your task list.

<b>Pricing</b>	<b>\$ 2,500</b>	<b>Initial purchase</b> (Includes 1 <sup>st</sup> year Subscription Plan)
	<b>\$ 625</b>	<b>Annual Support Plan</b> - This includes unlimited telephone support for this enhancement.
	<b>\$ 625</b>	<b>Annual Subscription</b> - This includes all updates and fixes for this enhancement and compatibility upgrades for future MAS 90 version releases.

MAS 200 SQL – Call for Pricing

[www.blytheco.com/enhance/task.asp](http://www.blytheco.com/enhance/task.asp)

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**Task Lists** can be sorted by User or Customer. Users are limited to viewing only their own Tasks. Supervisors can view all Tasks.

**\* Task Sorted By User**

User	CustomerNumber	ContactCode	ScheduledDate	Task No.
GLK	00-BLY	MAS90	02/07/2002	000000005
GLK	00-BLY	MAS90	02/07/2002	000000006
GLK	01-SEI	CEO	02/08/2002	000000002
GLK	01-SI	CEO	02/08/2002	000000003

Search: User=UserCode Begins with Find  
Filters... View: GLK  
Found 4 records GLK SPB 02/11/2002

**\* Task Entry Sorted by Customer**

CustomerNumber	UserCo...	ContactCode	Task No.
00-BLY	DAW	MAS90	000000004
00-BLY	GLK	MAS90	000000005
00-BLY	GLK	MAS90	000000006
00-BLY	DHK	PROG2	000000001

Search: CustomerNumber Begins with 00 Find  
Filters... View: \*GLK  
Found 4 records GLK SPB 02/11/2002

1. Task | 2. Customer Info | 3. Notes

Customer No. 00-BLY Blytheco, Inc.  
Contact Code MAS90 Ginger Kittinger  
Activity Sales Call  
Reference Follow-Up Call  
Profile Link  Group  Code   
S/O Link  Order

- Sales Call
- Appointment
- Call
- Sales Call
- Support Call

- Follow-Up Call
- Add-On Sales
- Follow-Up Call
- Initial Call/Profile

**Activities and References** are set up in Maintenance Screens – completely customizable by you! Once you select an Activity, References linked to that Activity are available in the drop down list.

**Task Report** selection allows you to create many different reports, such as a User report to fax or e-mail to employees for the next day's work list.

TASK REPORT

Support Task N000000005

Customer: 00-BLY Blytheco, Inc. Status: MAS200 NT  
Contact: MAS90 Ginger Kittinger Platform: MAS200 NT  
Telephone: (949) 583-9300 Activity: Call  
Contact Fax: (949) 583-0649 Reference:  
Contact e-mail: ginger@blytheco.com Entered Date: 02/07/02 Entered Time: PM 4:00  
User: GLK Ginger L. Kittinger Scheduled Date: 02/07/02 Scheduled Time: PM 4:30  
Assigned By: GLK Ginger L. Kittinger

Subject: Initial Call Date: 02/07/02  
02/07/2002 4:22 PM GLK Need to call to profile completely.

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Support Task N000000006

Customer: 00-BLY Blytheco, Inc. Status: MAS200 NT  
Contact: MAS90 Ginger Kittinger Platform: MAS200 NT  
Telephone: (949) 583-9300 Activity: Call  
Contact Fax: (949) 583-0649 Reference:  
Contact e-mail: ginger@blytheco.com Entered Date: 02/07/02 Entered Time: PM 4:30  
User: GLK Ginger L. Kittinger Scheduled Date: 02/07/02 Scheduled Time: PM 5:00  
Assigned By: GLK Ginger L. Kittinger

Subject: Follow Up Call Date: 02/11/02  
02/11/2002 2:38 PM GLK Stephen has one more question about imports before they sign proposal.

- Task Number
- Entered Date
- Scheduled Date
- Reminder Date

**Task Report**

Sort Option: Task Number Status  MultiSelect  
Activity  MultiSelect  
Reference  MultiSelect

Selection	All	Starting	Ending
Task No.	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Customer Number	<input checked="" type="checkbox"/>	00- <input type="text"/>	99- <input type="text"/>
User	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Assigned By	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Entered Date	<input checked="" type="checkbox"/>	<input type="text"/>	12/31/99
Scheduled Date	<input checked="" type="checkbox"/>	<input type="text"/>	12/31/99
Reminder Date	<input checked="" type="checkbox"/>	<input type="text"/>	12/31/99

HP spb5 Print Preview Printer Setup...

Check this Box to Select Status Codes GLK ABC 05/10/2002