Everest Web Edition

Version 6.0.5 Enhancements and New Features

Dashboard

The Everest Dashboard features up to six User selected Reports, Charts or Queries. Intuitive run time date range selection options enable visitors to filter results by common date ranges such as This Week, This Month, This Quarter, etc. The web page URL for the Everest Dashboard does not require a login so that real-time data can be shared across the enterprise.

The Everest Dashboard is included and installed automatically with the full installation and upgrade installations of version 6.0.5.

The URL for the Everest Dashboard is **http://ServerName/Everest/Dashboard** where *ServerName* is the name of your server.

By default, the Dashboard does not contain any data because it will not have any saved reports or charts. Publishing data to the Everest Dashboard is accomplished by clicking the **Add to Dashboard** button. The button is located at the top of the window for generated Reports, Charts and Query Reports but it is available only for Users associated with a User Group enabled with *System Manager Privileges*.

Personal View

Personal View provides a clickable bar chart of Open and Past due Concerns, Actions, Activities and Web Concerns specifically for the logged in User. Double-click on one of the bar charts to proceed directly to that View. The visibility of the Personal View is optional in Administration | User Information | User Groups. When enabled, the Personal View appears automatically upon login.

Supported Servers

64-Bit Windows Servers with IIS 7.0 are now supported.

Accounts

The field label for Fax Number in the Account View has been changed to “Alternate Phone”.

Activities

Email messages generated by clicking the **Send Notice** button have a **View Account Contacts** button option available when the **CC:** button is clicked. The User List is shown by default. There is also a checkbox option to **BCC Self** which sends a *blind carbon copy* to the sender when checked.

Concerns

Default display shows the last 10 concerns (previous default was 5).

When Delete Concerns is a disabled User Group privilege, the option to Delete Web Concerns is also disabled. This User Group setting is controlled in Administration | User Information | User Groups.

The Equipment List on the Concern Repairs Tab includes a **Global Search** checkbox option to search all Accounts. The default search functions the same, searching Equipment associated with the currently selected Account.

Actions

Email messages generated by clicking the **Send Notice** button have a **View Account Contacts** button option available when the **To:** or **CC:** buttons are clicked. The User List is shown by default. There is also a checkbox option to **BCC Self** which sends a *blind carbon copy* to the sender when checked.

Verification By is an added recipient selection for Action Notifications.

Interview is a new Reply Type format available for Actions in Administration | Actions | Action Types | Add (button). This format features an Interviewee selection list to identify an Account or Contact. The Interview is organized into two text areas labeled Purpose and Interview.

Search

Displays results with separate totals for Closed vs. Open Concerns.

Reports

Summary description has been added to Summary Report.

Summary and Action Reports can now be saved to a file.

New Reports include Returns Reports and Due Date Reports.

Queries

Displays results with separate totals for Closed vs. Open concerns.

Notifications

Embedded images in saved templates are now supported. When the template is sent via email, the images are visible for the recipient(s). Editing a notice, click the Image icon on the editor toolbar to insert an image. A template can include more than one embedded image. Templates are saved and edited in Administration | Notifications.

Notifications that are only printed (not emailed) now include a reminder option to save the notification as an attachment.

Administration

Users with open Activities cannot be deleted in Administration | User Information | Users.

The Product Import now automatically adds Product Groups that are not already saved in Administration | Product Information | Product Groups. The Product Import format is unchanged. Imports are processed in Administration | Imports.

Configuration

Two additional User Defined Fields have been added to each of three tabs in the Concern View. A total of 12 fields are now configurable on each tab; Reference Tab, Products Tab, and Repairs Tab in Configuration | User Defined Fields. Previously, the maximum was 10 fields per tab.

Data Integration

Live Lookup™ is now available as an integrated software add-on component. The Live Lookup™ provides a real-time Account List View to search and select account information from an external source database. Customer account information is only saved or updated in the Everest database as-needed. Supported source data connections include; SAP®, Oracle®, SQL Server™, Great Plains™, JD Edwards®, TXT, CSV.

Fixes

Name on Personal Accounts is required in all instances.

Renaming of Activities is applied across all contexts.

When an Inactive account is edited it will remain on the Inactive list.

Renaming of the Resolution field is now available in Configuration | Data Names.

Microsoft® Word™ is no longer documented in the Help as an optional editor for Notification Templates because the HTML is not a supported standard format.