

EVE Academy Videos Guide

Introduction

EVE is PADI's preferred Customer Relationship Management software package designed to improve the efficiency of running your Dive Centre, increase your sales (courses, retail, servicing, rental and trips) and maximise your profits.

The following is to be used as a suggested and efficient step by step guide beginning with EVE installation through to the use of all the facets of EVE. It is a reference guide for existing and experienced EVE users and to train staff new to EVE.

We highly recommend that you follow each of the steps in the sequence set out in this guide as this will stop you from having to repeat steps at a later date saving you time and hassle.

The guide outlines the sequence of steps with a short written explanation and then a link to a recorded video which will show and explain each of the steps. You can pause, rewind and watch each step so that you can implement it within your EVE system. If you have any specific questions at any stage you can contact ISSYS or your PADI Regional Manager who will be able to assist you.

Installation

a. Introduction to EVE

This video is an introduction to what EVE can do:

<http://www.youtube.com/watch?v=W4Zkt30AiVO>

b. Registering and Downloading EVE

This video shows how register and download EVE for the first time:

<http://www.youtube.com/watch?v=OoEv94Tm3LQ>

c. Installing the EVE Server Component

This video shows how to install the EVE Server Component onto your computer system:

<http://www.youtube.com/watch?v=rYpEh4YZP9A>

d. Installing the EVE Client Component

This video shows how to install the EVE Server Client onto your computer system:

<http://www.youtube.com/watch?v=1bEzBc2iISw>

e. Welcome to EVE... Opening EVE For the First Time

This video shows what to expect when you set up EVE for the first time:

<http://www.youtube.com/watch?v=Jcn5wO8xBVM>

f. Requesting Your PADI Certification Data

This video shows how to request your PADI certification data so that you can upload it into your EVE database:

http://www.youtube.com/watch?v=BJgN56M1_98

g. Importing Your PADI Certification Data

This video shows how to import your PADI certification data from the file sent by PADI:

<http://www.youtube.com/watch?v=dZiy2cE1uEE>

h. Marketing Your Divers

This video shows highlights some of the tools that EVE has to market to your customers:

http://www.youtube.com/watch?v=_nSn6icWV9c

Options

a. How to Set Up Email Options

This video shows how to set up email options:

<http://youtu.be/bUd8T6ucSGg>

b. How to Use the Customer Options

This video shows how to use the customer options:

<http://www.youtube.com/watch?v=ec8GgAVpdJE>

c. How to Use the Courses Options

This video shows how to use the courses options:

<http://www.youtube.com/watch?v=WQvy97w3Xd4>

d. How to Set up the Sales Options

This video shows how set up the sales options:
<http://www.youtube.com/watch?v=cFD0jdjPYl8>

e. How to Use the Rentals and Servicing Option

This video shows how use the rentals and servicing options:
<http://www.youtube.com/watch?v=42w7VylOcM>

f. How to Use the Trips Options

This video shows how to use the trips options:
<http://www.youtube.com/watch?v=Al2ZFFBJTe8>

Customers**a. How to Find a Customer and the Customer Record**

This video shows how to find a customer and the customer record:
<http://www.youtube.com/watch?v=bj4DFF4-Tc4>

b. How to Merge Customers Using the Auto Merge and Manual Merge Options

This video shows how to merge customer records using the auto merge and manual merge options:
<http://www.youtube.com/watch?v=dPS75UitQz8Y>

c. How to Create a New Customer

This video shows how to create a new customer:
<http://www.youtube.com/watch?v=ldBFJv1Bm5Q>

d. How to Set Up and Use Enquiry Sources

This video shows how to set up and use enquiry sources:
<http://www.youtube.com/watch?v=A-BThmFXaGk>

e. How to Set Up and Use Customer Types

This video shows how to set up and use customer types:
<http://www.youtube.com/watch?v=3ne8-zxVAMk>

f. How to Set Up and Use Mailing Lists

This video shows how to set up and use mailing lists:
<http://www.youtube.com/watch?v=Cwf1rwtmGds>

g. How to use the customer search wizard for marketing

This video shows how to use the customer search wizard for marketing:
<http://www.youtube.com/watch?v=zuBNQqWblOE>

h. How to Set Up a New Employee

This video shows how set up a new employee:
<http://www.youtube.com/watch?v=rbFRnx-xziw>

i. How to Make Information Mandatory on a Customer Record

This video shows how to make Information Mandatory on a Customer Record:
<http://www.youtube.com/watch?v=J1Z5Ze9e9o4>

j. How to Set Up and Manage Customer Enquiries and Follow Ups

This video shows how to set up and manage customer enquiries and follow ups:
<http://www.youtube.com/watch?v=Y5bOCGmlwcv>

k. How to Set Up and Use EVE for Contact Calls, Reminders and Popup Notes

This video shows how to set up and use EVE for contact calls, reminders and popup notes:
<http://www.youtube.com/watch?v=UGfnHE5GKuc>

l. How to Work Out the Value of an Enquiry Source

This video shows how to set up and work out the value of an enquiry source:
<http://www.youtube.com/watch?v=sdDnd3FdXt4>

Course/Calendar

a. How to Set Up a Teaching Location

This video shows how to set up a teaching location:
<http://www.youtube.com/watch?v=HGEhRMV1zeo>

b. How to Set Up a New Course

This video shows how to set up a new course:
<http://www.youtube.com/watch?v=KAVSMMB9ncg>

c. How to set up Course Reoccurrence

This video shows how to set up a course recurrence:
http://www.youtube.com/watch?v=w5Du8e-zz_w

d. How to Access Your Calendar and Adjust Settings

This video shows how to set up your EVE Calendar and how to adjust the settings:
<http://www.youtube.com/watch?v=dFmBnKKf5eM>

e. How to Set Up a Stock Item to Sell a Course

This video shows how to set up a stock item to sell a course:
<http://www.youtube.com/watch?v=xkxGP9NHfjk>

f. How to Sell to Groups

Under production

Marketing

a. How to download and set up marketing email templates using Outlook

Under production

b. How to use the customer search wizard to send a new merged email using Outlook

Under production

c. What is the EVE Agent and How to Turn It On?

This video shows how to turn on the EVE Agent:
http://www.youtube.com/watch?v=qnVW_iFdhjuo

d. How to use the EVE Agent with Outlook

Under production

e. How to link the EVE Agent to Your MailChimp Account

This video shows how link the EVE Agent to your MailChimp account:
<http://www.youtube.com/watch?v=MDGXcVjwXs>

f. How to Create a MailChimp Account and Link to EVE

This video shows how to create a MailChimp account and link it to EVE:
<https://www.youtube.com/watch?v=hUDTaMiyOsl>

g. How to Create a List in MailChimp

This video shows how to create a list in MailChimp:
<https://www.youtube.com/watch?v=BKLoq8o6Vec>

h. How to Create a Campaign in MailChimp

This video shows how to create a campaign in MailChimp:
<https://www.youtube.com/watch?v=9FaN7844eEO>

i. How to Set Up a New EVE Agent Auto Email Campaign Using MailChimp

This video shows how to set up a new EVE Agent auto email campaign using MailChimp:
<https://www.youtube.com/watch?v=BjLz2rUw2U>

j. How to Set Up Course Promotions Using the EVE Agent

This video shows how to set up course promotions using the EVE Agent:
https://www.youtube.com/watch?v=ujqce6x_XW0

k. How to Set Up Pre-Course Marketing Emails Using the EVE Agent

This video shows how to set up pre-course marketing emails using the EVE Agent:
<https://www.youtube.com/watch?v=AMatgZbesGA>

l. How to set up marketing emails to be sent during a course using the EVE Agent

Under production

m. How to set up marketing email to be sent out after a course has finished using the EVE Agent

Under production

n. How to set up EFR refresher EVE Agent job

Under production

o. How to set up SCUBA Review EVE Agent job

Under production

p. How to Set Up SMS/Text Messaging

This video shows how to set up sms/text messaging:
<http://www.youtube.com/watch?v=wrk-8aV54EQ>

q. How to Set Up SMS/Text Messaging Using the EVE Agent

This video shows how how to set up sms/text messaging using the EVE Agent:
<http://www.youtube.com/watch?v=3iq7YUKMmpc>

Inventory**a. What are Cost/Profit Centres and Stock Types/Items?**

This video shows what a cost/profit centres and stock types/items are:
http://www.youtube.com/watch?v=nuO-XZcxa_o

b. How to Set Up a Supplier

This video shows how to set up a supplier/manufacturer in EVE:
<http://www.youtube.com/watch?v=qOcZWaSx6ml>

c. How to Set Up a Stock Type

This video shows how to set up a stock type:
http://www.youtube.com/watch?v=XCv-VyY_tK8

d. How to Create a Stock Item

This video shows how to create a new stock item:
<http://www.youtube.com/watch?v=j7MSo8iKCRc>

e. How to Use the Excel Import Templates

This video shows how to use the Excel import templates/files:
<http://www.youtube.com/watch?v=1SVEjVwPYqg>

f. How to Import a Stock Item Import File into EVE

This video shows how to import a stock item import file into EVE
<http://www.youtube.com/watch?v=FS5T9PiaJls>

g. How to Use the Inventory Search Wizard

This video shows how to use the inventory search wizard:
<http://www.youtube.com/watch?v=0anUH9eyLu0>

h. How to do an Inventory Count

This video shows how to an stock take/inventory count:
<http://www.youtube.com/watch?v=hfld4PomJbk>

i. How to do a Retail Price Update

This video shows how to a retail price update:
http://www.youtube.com/watch?v=INN5q2_QJq0

j. How to Create a Simple Equipment Package Sale

This video shows how to create a simple equipment package for sale:
<http://www.youtube.com/watch?v=gF4D5iFv4Ec>

k. How to create a flexible package of stock items for sale (Equipment)

This video shows how to create a flexible package of stock items for sale (equipment):
<http://www.youtube.com/watch?v=xWnm0Gq77wM>

l. How to Use the Purchases Search Wizard

This video shows how to use the Purchases Search Wizard:
<http://www.youtube.com/watch?v=2HUmikyVhw>

m. How to Create Purchase Orders

This video shows how to create purchase orders:
<http://www.youtube.com/watch?v=Sl6ZxQ4fmSU>

n. How to create PO Deliveries & PO Invoices

This video shows how to create PO Deliveries & PO Invoices:
<http://www.youtube.com/watch?v=Qyg6LjjwHQ>

o. How to Import Rental Equipment

This video shows how to import rental equipment into EVE:
<http://www.youtube.com/watch?v=q3d04WTPwKU>

Rentals**a. How to Set Up Rental Sizes and Prices**

This video shows how to set up rental sizes and prizes:
<http://www.youtube.com/watch?v=CuATto5dlmQ>

b. How to Set Up a Customer Rental Profile

This video shows how to set up a customer rental profile:
<http://www.youtube.com/watch?v=0a-Bn4mbsdY>

c. How to Set Up a Rental Booking

This video shows how to set up a rental booking:
<http://www.youtube.com/watch?v=qyF4bWgnUJO>

d. How to Set Up a Rental Booking Print Layout

This video shows how to set up a rental booking print layout
<http://www.youtube.com/watch?v=BhheaXSiOUg>

e. How to Send a Rental Booking to an Invoice

This video shows how to send a rental booking to an invoice:
<http://www.youtube.com/watch?v=soiGFBf4jGE>

f. How to Create a Rental Package Sale Item

This video shows how to create a rental package sale:
<http://www.youtube.com/watch?v=UDr9YKLT9d4>

g. How to Gain an Overview of Your Equipment Rental

This video shows how to gain an overview of your equipment rental:
<http://www.youtube.com/watch?v=2x6-0WfOlNk>

Sales**a. How to Set Up Different Invoice Types**

This video shows how to set up different invoice types:
<http://www.youtube.com/watch?v=yT3gMlxXu3k>

b. How to Set Up and Use Accounts

This video shows how to set up and use accounts:
<http://www.youtube.com/watch?v=NFte3x4xsfA>

c. How to Set Up Your Invoice Template, the Print Action and eReceipt

This video shows how to set up your invoice template, the print action and eReceipt:
http://www.youtube.com/watch?v=dih_FvlqvBo

d. How to Set Up and Use Gift Cards and Gift Certificates

This video shows how to set up and use gift cards and gift certificates:
<http://www.youtube.com/watch?v=lbbkSyF8Ks>

e. How to Set Up and Use Multi-Sale Items

This video shows how to set up and use multi-sale items such as air cards:
http://www.youtube.com/watch?v=ITknuZl_UrE

f. How to Set Up Discount Bands

This video shows how to set up discount bands:
<http://www.youtube.com/watch?v=reiZtlrifrl>

g. How to Set Up Different Discount Levels for Different Customer Types

This video shows how to set up different discount levels for different customer types:
<http://www.youtube.com/watch?v=b6FbBLHyYBU>

h. How to Set Up and Use Quotes

This video shows how to set up and use quotes in EVE:
<http://www.youtube.com/watch?v=W4UuunjZlI8>

i. How to Create an Automatic Email to be Sent to Students to Promote Equipment They Haven't Bought Yet

Under production

j. How to Set Up and Use a 'Wish List'

Under production

Servicing

a. How to Set Up Stock Types for Servicing and Servicing Reminders

This video shows how to set up stock types for servicing and servicing reminders:
<http://www.youtube.com/watch?v=lMrOBzgZfkU>

b. How to Create a New Service Booking

This video shows how to create a new service booking:
<http://www.youtube.com/watch?v=5aa8nwnprdY>

c. How to Complete a Service Booking and Send It to an Invoice

This video shows how to complete a service booking and send it to an invoice:
<http://www.youtube.com/watch?v=eJmakWEYwlv>

d. How to Send Out Automatic Servicing Reminders

This video shows how to send out automatic servicing reminders:
http://www.youtube.com/watch?v=9uwM_Nb4_m8

Trips

a. How to Set Up Boats and Destinations

This video shows how to set up boats and destinations:
<http://www.youtube.com/watch?v=hOzWrrslno>

b. How to Create Trips and Day Trips

This video shows how to create trips and day trips:
http://www.youtube.com/watch?v=rj3Q_9s4m3s

c. How to Set Up a Stock Item to Sell a Trip

This video shows how to set up a stock item to sell a trip:
<http://www.youtube.com/watch?v=yqKttuv8p-E>

d. How to Create an Auto-Email to be Sent to Trip Customers

This video shows how to create an auto-email to be sent to trip customers:
<http://www.youtube.com/watch?v=Pf6mwEaDNh8>

Clubs**a. How to Set Up a Dive Club and Club Membership Types**

This video shows how to set up a dive club and club membership types:
<http://www.youtube.com/watch?v=umGybGr4kZ0>

b. How to Sell Club Memberships

This video shows how to sell club memberships:
<http://www.youtube.com/watch?v=C32xmSA2S-I>

c. How to Create an Auto-Email for Club Membership Renewal Reminders

This video shows how to create an auto-email for club membership renewal reminders:
<http://www.youtube.com/watch?v=zb1bcN7Feko>

Reports**a. How to Access Reports Under the File Menu**

This video shows how to access reports under the file menu:
<http://www.youtube.com/watch?v=GICnTvp2s98>

b. How to Use the Sales Search Wizard - Invoices

This video shows how to use the sales search wizard with regard to invoices:
<http://www.youtube.com/watch?v=khgUcNZ7uDI>

c. How to Use the Sales Reports under the File Menu

This video shows how to use the sales reports under the file menu:
<http://www.youtube.com/watch?v=3NRdJCK7Ojl>

d. How to Set Up Report Groups

Under Production

e. How to Use the Sales Search Wizard - Payments

This video shows how to use the sales search wizard with regard to payments:
http://www.youtube.com/watch?v=7Ju4Yw2_imo

f. How to Use the Purchases Search Wizard

This video shows how to use the purchases search wizard:
<http://www.youtube.com/watch?v=2HUmiikyVhw>

g. How to Use the Courses and Customers Reports Under the File Menu

This video shows how to use the Courses and Customers Reports under the file menu:
<http://www.youtube.com/watch?v=iBrx6D3jyjU>

h. How to Use Charts

This video shows how to use charts in EVE:
<http://www.youtube.com/watch?v=AQvLruWn8KM>

i. How to use the Rentals and Services Reports Under the File Menu

This video shows how to use the rentals and services reports under the file menu:
<http://www.youtube.com/watch?v=n6OskSH5Cfg>

Extras

a. How to Back Up Your EVE Database

This video shows how to back your EVE database:
<http://www.youtube.com/watch?v=Su3PAHhMCEw>

b. How to Restore Your EVE Database From a Back Up

This video shows how to restore your EVE database from back up:
<http://www.youtube.com/watch?v=DendUvzc9BO>

c. How to Set Up EVE to Produce a Kit Picking List for Courses and Trips

Under production

d. How to Set Up a Group Booking for a Course or Trip

Under production

e. How to Set Up and Manage Customer Enquiries

Under production

f. How to Set Up and Use EVE for Contact Calls

Under production

g. How to Set Up and Use Pop Up Notes

Under production

h. How to Use EVE for Staff Scheduling and Desktop Use

Under production

i. How to Set Up an Automatic Monthly Newsletter

This video shows to set up an automatic monthly newsletter:
<http://www.youtube.com/watch?v=8edqrtEVonI>

j. How to Create Automatic Annual Emails

This video shows how to create automatic monthly emails:
<http://www.youtube.com/watch?v=Tvjy7Ao1C7U>

k. How to Work Out the Value of an Enquiry Source

This video shows how to work out the value of an enquiry source:
<http://www.youtube.com/watch?v=SGj0VbqL7SQ>