Equipment Rental Tracker Plus™
A Complete Business Management System

User Guide

Welcome! Thank you for downloading your copy of Equipment Rental Tracker Plus™ from SpiritWorks Software Inc.

Equipment Rental Tracker Plus was developed with the small business person in mind. **This program promotes greater work productivity**, because you will be able to spend less time keeping track of all your bookkeeping requirements.

All information used in *Equipment Rental Tracker Plus* is stored in interrelated database files which contain sets of information, called records, such as contacts, tasks, schedules, etc. In some databases you will create lists of inventory, clients, etc. which you will be able to pick from when completing new records. In some cases the records in a database automatically create a list to choose from.

Equipment Rental Tracker Plus contains **easily searchable databases** of all your business functions, including income, expenses, contacts, etc. You can also print out **several different reports** from each database to keep in your filing system.

By using *Equipment Rental Tracker Plus*, you not only keep track of your inventory and invoice details, but you can easily find out what items need reordering, keep track of income and expenses and prepare tax forms. **Through better organization of your business information you can realize better time management.**

You can use the software for ten days (or ten uses) before needing to purchase a registration number. To register *Equipment Rental Tracker Plus*, go to http://productivity-software.com/equipment/register.html

When you receive your registration number, click the **Register** button on the Welcome screen and fill in your user name and the registration number. You will then be entitled to updates, technical support and can use the software indefinitely.

Almost every window in this software has a **Help** button which will display a window that contains all the most current information about that component of the software. The Help window also contains a **Tutorial** for each component.

Your questions, comments, suggestions and bug reports are always welcome. Please send your email to: support@productivity-software.com

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Getting Started

Information about common controls and backing up your data.

Guided Tour

We highly recommend taking a quick tour of the software's functionality by clicking on the **Guided Tour** button located near the top right corner on the welcome screen. This tour will familiarize you with the software program in general.

Import or Delete Sample Data

All information used in *Equipment Rental Tracker Plus* is stored in several interrelated database files. Each database contains sets of information, called records, such as contacts, tasks, schedules, etc. Prior to using the software for the first time, it is highly recommended you import the sample data.

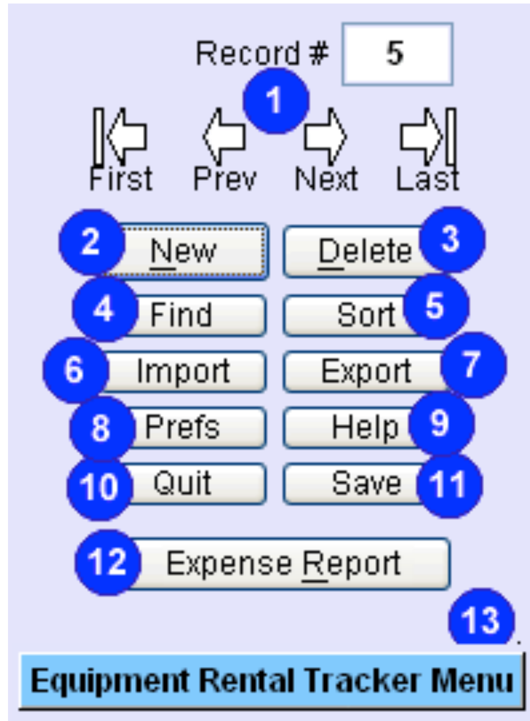
We recommend that you import the sample data provided with this software, and experiment with it for a little while, allowing you to understand how you will enter data into the records in the various databases with your own data.

To import the sample data, click **Guided Tour** on the Welcome screen and then click the **Import Sample Data** button.

To delete the sample data, click **Guided Tour** on the Welcome screen and then click the **Delete Sample Data** button.

Common Features

The most common features of *Equipment Rental Tracker Plus* are similar in each screen. These features include:



(1) The **Prev** and **Next** arrow buttons move between the records in the database. The **Record #** field displays the number of each record in the database. The number of a record may change if you delete a record or sort the database. Click the **Last** button to see how many records there are.

(2) Click the **New** button to create a new record. To remove one or more records from the database, click the **Delete** button **(3)**. You will then be asked if you want to delete **All** records or **Just this one** (only the current record).

The **Find** button **(4)** is used to search for text on any record in that particular database. The **Sort** button **(5)** sorts the records by certain fields.

To update or import records from a different version of the software, click the **Import** button **(6).** To **Backup All** records or export data from any single database, click the **Export** button **(7).**

The **Prefs**, or Preferences button **(8)** opens a new window where you can change visual aspects of the software, and change date, time and currency formats.

There is a **Help** button **(9)** on nearly every screen which opens a new window with context sensitive information about that screen and all the features of that database.

The **Quit (10)** button simply takes you out of the program itself. Closing the last window will also quit the program, but you will not be reminded to backup your data.

You can save the current database by clicking the **Save** button **(11)**. Data is normally saved automatically when going to another record or closing a window.

Each component has a **Report (12)** button in the lower right corner of the screen that opens a new window with report options or output.

In the lower left corner of each component's main window is an **Equipment Rental Tracker Plus Menu** button (13) which you will use to access the other components of the software.

Backing Up Data

It is always a good idea to backup your data on a regular basis, either daily or weekly. There are four ways to back up your data in *Equipment Rental Tracker Plus*. In any registered version of the software, whenever you click the **Quit** button, you are asked if you want to create a backup of your records. Essentially, this is the same as clicking the **Backup Records** button on the Welcome screen.

By creating a backup of your records, you will be able to restore your data to another copy of the software, should your computer or the software fail for some reason. The backup file will also be useful when updating to a new version of the software. The file has the extension .bak and will be created in the software directory that you specify.

Another way to backup your records is by clicking the **Export** button in any of the components of the software. You will have the choice of **Backup All** or **Export,** which just exports the records in the current database.

Whenever you create a backup or export file you should make sure it is at least as big as any previous file and then copy it to another drive. A USB drive works well for this and it is recommended you keep the latest installer file on this drive too.

The final method is to copy the entire program folder onto a CD/DVD. In Windows, the program folder can be found in your Documents folder. On the Mac, look in the Applications folder. This is the least desirable method as it takes up much more disk space and if you want to update to a newer version of the software, you need the backup or export files.

The recommended backup method is to save the .bak file to your computer and then copy the backup (or export) files to another disk, at least once a week, so that if you need to reformat your drive for some reason, the backup files are not on that drive.

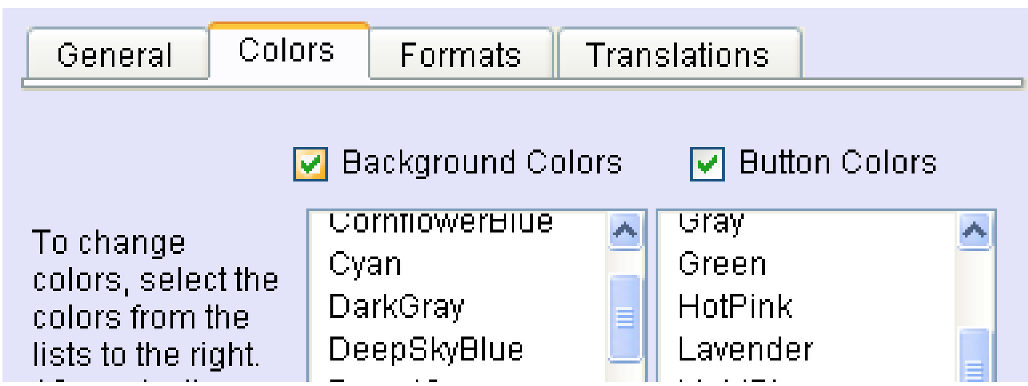
Tabs & Preferences

Tabs are special buttons which allow you to see more information or options in a window. You will find tab buttons in many components of the software.

In the Preferences window, for example, the buttons pictured above allow you to choose which options are displayed at any one time, making the screen much less cluttered. By clicking each tab button you hide and show specific fields and/or buttons.

Here are the features of the Preferences window:

Color Preferences



Reveal the two color lists by choosing the **Background Colors** and/or the **Button Colors** options near the top of the screen.

You can change the background color for each component (or all windows) of this program by choosing a color from the **Background Color** list. The background color, of the component you clicked the **Prefs** button in, will automatically change to the new color. Use the up and down arrow keys to change the colors after selecting the first one. Choose any color by selecting the Other... option in the **Background Colors** list.

Change the button colors by choosing a color from the the **Button Color** list. The button colors, of the component you clicked the **Prefs** button in, will automatically change to the new color. Use the up and down arrow keys to change the colors after selecting the first one. You can choose any color by selecting the Other... option in the **Button Color** list.

Play around with these selections until you find a color combination that is pleasing to your eyes.

By default, each component has the same colors, but you can set different colors for each component, so it is easier to tell the components apart, by turning off the **Use these colors in all windows** option.

Click the **Set Desktop Cover** button to choose a color or pattern to hide other program windows, and the icons on your Desktop, for a full screen effect. You can choose from one of the preselected patterns, choose a **Custom Pattern**, a solid **Black** or a solid **Custom Color**. If you change your mind, click the **Clear Desktop Pattern** button to remove the desktop cover. Click the **Return to Colors** button to exit the Desktop Cover selection screen.

Click the **Rounded Appearance** button to make the buttons and fields more rounded and three dimensional.

To change the highlight color, click **Highlight Color,** hold down the Control (or Command) key and then click a color from the **Background** colors list.

Click the **Default Settings** button to return all settings back to their default values.

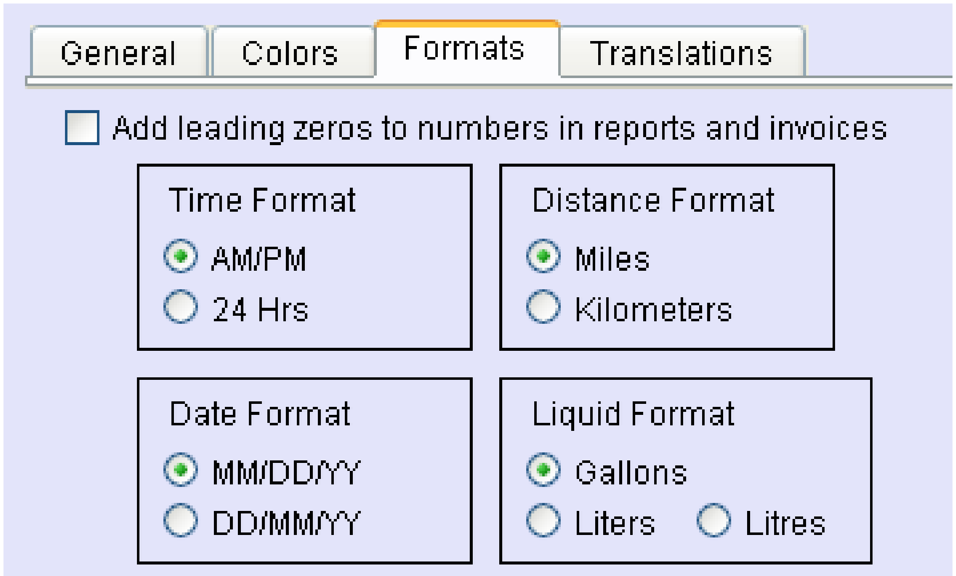
Click the **Save** button to save your new Preferences.

Click the **Help** button to find out about all the options in the Preferences window.

Click the **Close Window** button to close the Preferences window.

Formats

You can choose different formats by clicking the **Formats** tab.



The **Time Format** defaults to **AM/PM**, but if you would want times displayed in 24 hour format, click **24 Hrs**.

The **Date** Format defaults to **MM/DD/YY** (ie, 12/25/02), but if you would want dates displayed in European format (ie, 25/12/02) click the **DD/MM/YY** button.

The **Distance Format** allows you to change appropriate labels to **Kilometers** or **Miles**.

You can also change the **Liquids Format** to **Gallons, Liters** or **Litres.**

The **Add leading zeros to numbers in reports and invoices** option is designed to help line up numbers in some reports and invoices, and creates columns of numbers that look like this:
$1002.34
$0035.79
$0123.45

International Preferences

Enabling the **International Version** option changes the spelling of check to cheque, sets print margins for A4 paper, and adds VAT or GST tax form reports to Expense Tracker's Reports.

The **Address Preferences** button allows you to specify what Districts are called in your country and which Postal Code type is used. The **Address Format** menu determines the order and format of the City, State or District fields in all printed addresses.

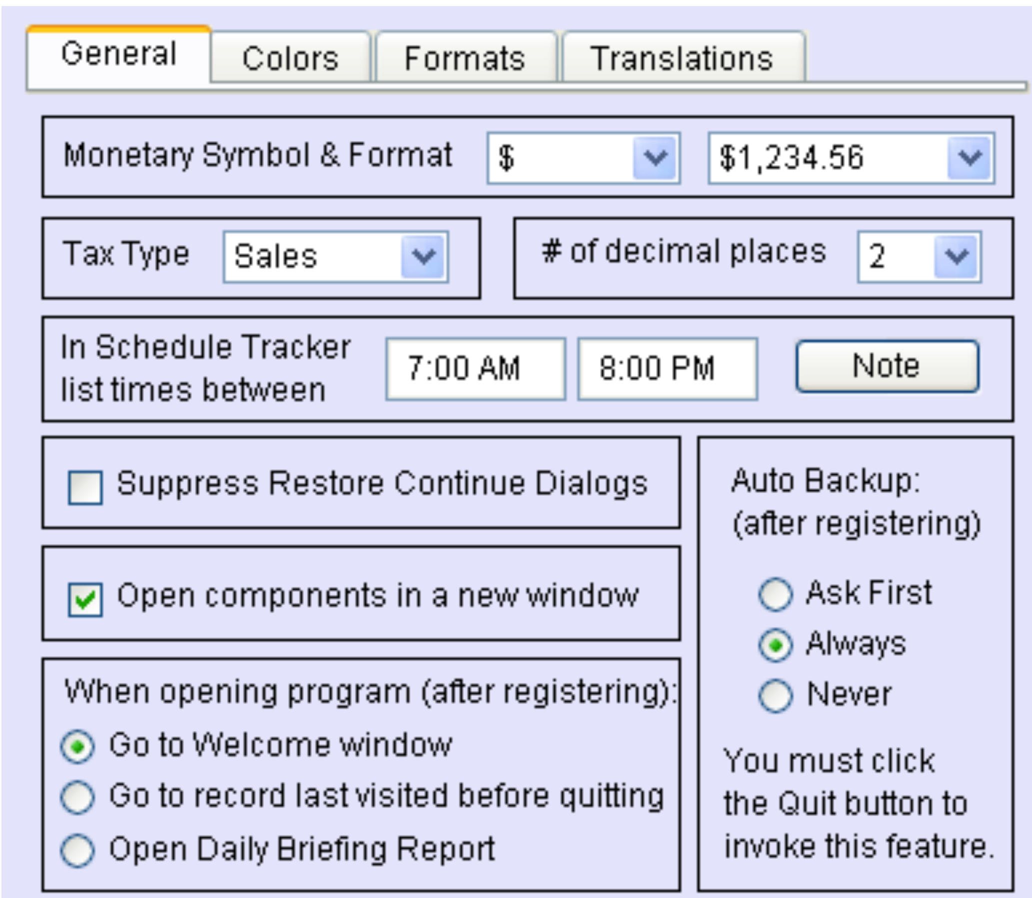
You can change **Monetary Symbols** and **Tax Types** in the **General** section of the Preferences window.

Other Preferences

Click the **General** tab to set more preferences.

You can set the **Monetary Symbol & Format** to something other than the dollar sign ($), if you use a different one, by picking a new symbol from the menu, or by choosing Other... from the menu. You can use up to 4 characters for the monetary symbol. The new symbol will be displayed in all invoices and reports. Use the next menu to choose your preferred currency format ($1,234.56, $1.234,56 or 1.234,56$)

Change your local **Tax Type** from **Sales Tax** to **VAT, GST** or any other, by using the menu provided. You can specify the **# of decimal places** to be displayed in numbers.



Specify the start and end times for Schedule Tracker reports (when the **Show All Times** option is selected) in the **In Schedule Tracker list times between** section.

The **Open components in a different window?** button allows you to choose if you want each component to open in a new, separate window. Opening new components in new windows sometimes creates too many open windows for some people. Some components, such as the Universal Calculator, always open in a new window.

The **When opening program (after registering)** section allows you to choose if you want the program to open to the Welcome window, where you can choose the component you want to use from the pull-down menu (in versions that contain several components), OR if you want to **Go to the record last visited before quitting** (ie, the one you were working on when you clicked the **Quit** button), OR if you want the **Daily Briefing Report** displayed when you open the program. These options only works in registered versions of the software.

When you click any of the **Quit** buttons (after registering the software) you can specify If you want an **Auto Backup** done. The choices are **Ask First, Always** (you will be asked to specify the name and location of the backup file), or **Never** (you will not be asked again when quitting).

Keyboard Shortcuts

Many buttons have a keyboard equivalent, also known as a keyboard shortcut.

Shortcuts are indicated by the letter of the button that is underlined. Just press the letter on your keyboard to activate the button. If you have selected the **Rounded Appearance** option in Preferences, you will not see any underlined letters in the buttons. These shortcuts will still work though.

You may need to press the Alt key (or the Command key on the Macintosh) and then the shortcut letter.

In any field that you can type in, you can also use the standard Cut (Ctrl + x or Command + x), Copy (Ctrl + c or Command + c) and Paste (Ctrl + v or Command + v) keyboard shortcuts. Select All (Ctrl + a or Command + a) is also fully supported, but Undo (Ctrl + z or Command + z) is not. Sometimes it works and sometimes it doesn't.

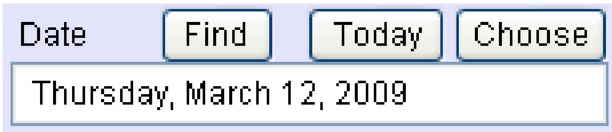
You can also use (Ctrl + s or Command + s) to save your data at any time and (Ctrl + w or Command + w) to close any window . Closing the last window will quit the program but without saving any changes. (Ctrl + q or Command + q) will also quit the program plus save any changes.

In windows where there is a **Find** button, you can use (Ctrl + f or Command + f) to open the Find/Search dialog. Also in windows where there is a **New** button, you can use (Ctrl + n or Command + n) to create a new record (in this case Alt + n is the same). Finally, in windows where there is a **Help** button, you can use (Ctrl + h or Command + h) to open the help window (and in many cases Alt + h does the same thing).

See the **Keyboard Shortcuts** section in each individual Help window for more keyboard equivalents.

Data Input

Some data can be input directly into a field such as the **Notes** field. Most fields require going through a dialog of some kind. This prevents you from entering data that would cause errors, and so you can pick from a list rather than having to retype.

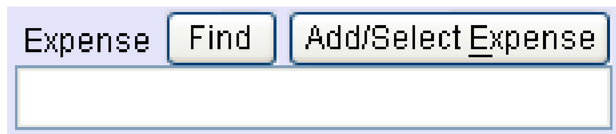


Most **Date** fields have three buttons above them for various methods of data input.

You can click the **Today** button to input the current date. Clicking the **Edit** button or the field itself produces a dialog which asks you to enter a date.

By clicking on the **Choose** button you can choose a specific date from a calendar.

Many fields have **Add/Select** buttons above them which allow you to pick an entry from a list. You can also **Add, Delete** or **Modify** entry names from this window.

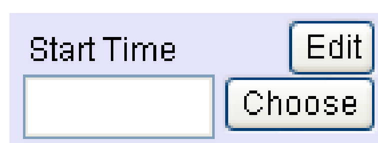


There is often a **Find** or **Go To** button above these fields that will help you quickly locate the first or last record associated with that field. There is sometime a **View** button which take you directly to the related record in another component of the software.

In any field that you can type in, you can use the standard Cut (Ctrl + x or Command + x), Copy (Ctrl + c or Command + c) and Paste (Ctrl + v or Command + v) keyboard shortcuts. Select All (Ctrl + a or Command + a) is also fully supported, but Undo (Ctrl + z or Command + z) is not.

You can also use (Ctrl + s or Command + s) to save your data at any time and (Ctrl + w or Command + w) to close many windows. Although records are normally saved when going to another record, or closing the component it is often a good idea to click the **Save** button after making changes, just to be safe.

Most **Time** fields have buttons around them which allow for various methods of data input. You can click the **Now** (not pictured) button to input the current time and date. Clicking the **Edit** button produces a dialog which asks you to enter a time. The **Choose** button displays a more graphical way of choosing the time.



Reports

Various reports can be generated from each component of *Equipment Rental Tracker Plus*. Look for a **Report** button in the lower right corner of the main window of each component.

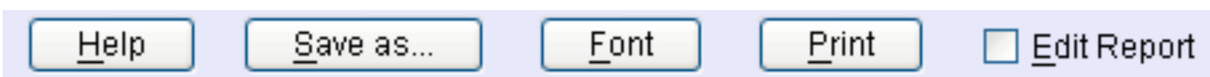
The Reports for each component are somewhat different because of the nature of the data collected and the type of report to be generated. In some cases there is an intermediate screen where you can choose **Options** and **Sort Orders** and pick other specific criteria for your report.

In most cases, you go directly to the report screen where you have a few options and choices for your report.

There is a **Help** button on each option window with more about the report options.

In many cases you can choose a range of **Dates** for your report.

On the bottom of the report window, you will find the following buttons (plus a **Close Window** button which is not pictured):



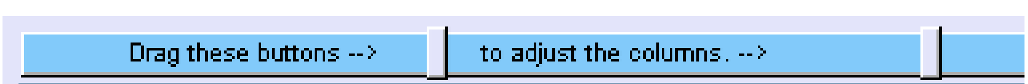
Save As... saves the report as a text file for archiving or exporting to a spreadsheet or word processor for formatting, etc.

Font allows you to specify the size and font of the text in the report.

Print prints the report – you may need to print some reports in Landscape mode (horizontally as opposed to the normal vertical orientation).

Edit Report allows you to make changes to the report before printing or exporting – when this button is unchecked (in its normal position) you can click the main line of each record's data to go directly to that record.

There is a row of buttons, above the report's output field, (pictured below) that allow you to change the width of the columns (the tab stops) in the report. Just drag any of the little rectangles left or right to make the report more readable.



Updating the Software

When updating the software, make sure the software is backed up completely by creating a .bak file. You can do this by clicking the **Backup Records** button on the Welcome screen. You can also copy the software to a CD if you wish. Then delete the old copy of the software from your computer.

You should never have more than one copy of the software on any computer. If you do, the program can get confused about which file to write to and it will appear that the data you are adding disappears when you open the program the next time.

After deleting the old copy, download a new installer from http://productivity-software.com/equipment/dl2.html and then install the new version on your computer. Next Register the new copy and then click **Restore Records** on the Welcome screen and locate your .bak file.

Multiple Users

Equipment Rental Tracker Plus is not designed to run on a server. Each user needs to have a copy of the software on their computer. They can then export their records periodically and then send them to another user for importing. This is a fairly simple process. The export files are very small and can be emailed or sent across a network. Each user needs to have their own registration number. Only one person can make changes to the records.

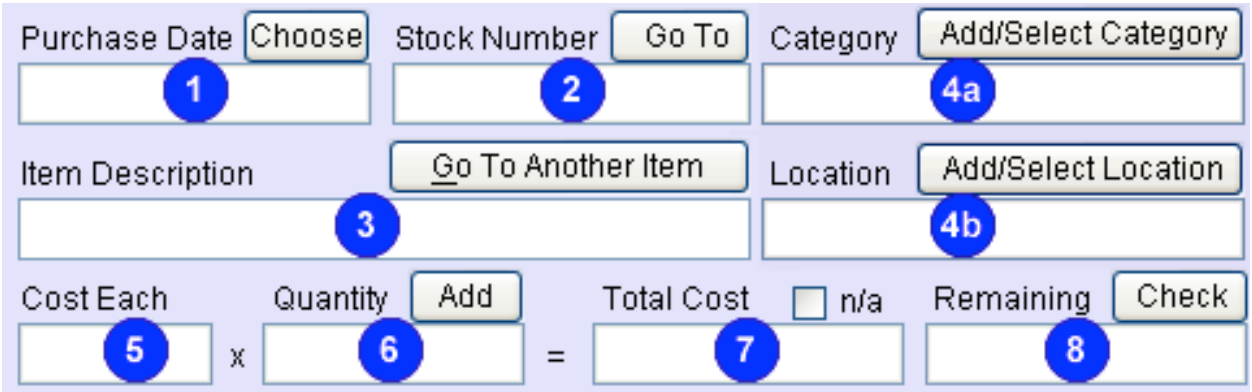
Other Helpful Things to Know

You can save any or all of the text in the Help window for each component of the software, as either an HTML or text file. Just click the **Save As** button found at the bottom of the Help window. You can then print the text file from any word processing program or view the HTML file within your web browser.

Occasionally during a save or a crash, the current database will get corrupted. Fortunately, the file is always saved with an .rev~ extension first. If a component suddenly disappears from the menu, locate a file with an .rev~ extension within the application's folder (in Windows look in your My Documents folder). If you find a file with the same name and without the .rev~ extension, simply delete the .rev file and remove the ~ from the other file. For example, if contacts.rev were to get corrupted, you will find a duplicate file name but with .rev~ called contacts.rev~. Delete the contacts.rev and rename contacts.rev~ to contacts.rev.

If you have any questions or comments about the software, feel free to email us at: support@productivity-software.com

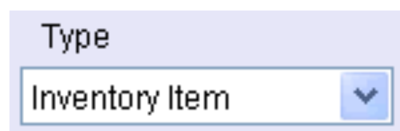
Inventory Tracker



This component keeps track of all your inventory items. Use the **Purchase Date** field **(1)** to keep track of when you last purchased an item. Each item is assigned a **Stock Number (2)**. To change the one that is automatically assigned, just click the field. Then type or **use your barcode scanner to enter a Stock Number.**

Type the main **Item Description** in field **(3)**. You will use the **Go To Another Item** button (above this field) to display a list of other items (or records) to go to.

Next choose a **Type** from the menu. There are seven **Types** of inventory records. They are; **Inventory Item, Assembly, Rental Item, Rental Quantity, Service - Flat Rate, Service - Hourly,** and **Other Charge.** Service and Other charges have don't have any cost, quantity, remaining, lot numbers, vendors, or photos. **Rental Quantity** items do have a cost and quantity, but no lot numbers.



Additional item descriptions can be entered into two other fields (4a & 4b). By default these are **Category** and **Location**, but these can be changed to Serial Number or used for any purpose. The **Add/Select Category or Location** buttons allow you to create custom lists and quickly pick from these.

To change the names of these two description fields, just click on the **Prefs** button and choose **Inventory Tracker Prefs.** Choose a new label from the **Description 1** and **Description 2** menus. You will find an **Other** choice so you can change these to almost anything you want. The labels on all records will be changed to the new names.

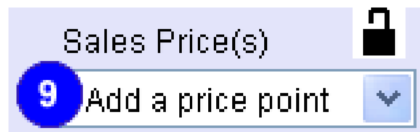
You can also choose whether to display these two description fields on your invoices by enabling the two **Add to Invoices** options.

Inventory Items

Fill in the **Cost Each (5)** and **Quantity (6)** and the **Total Cost (7)** will be calculated. If you have an unlimited quantity of the item or you only handle special orders, then click the n/a button above the **Total Cost** field **(7)**.

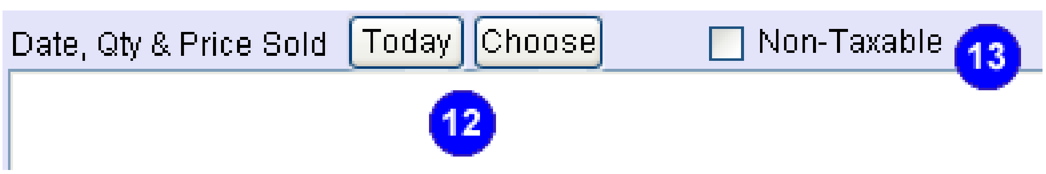
The **Remaining (8)** field displays the amount of stock that you still have in inventory. The **Check** button above this field produces a report of any items that need to be reordered (the Remaining field is less than the Reorder field).

Next enter the **Sales Price(s)** by choosing **Add Price Point** from the menu provided **(9)**. You can add up to four price points for each item. The price you choose from this menu will be displayed in reports as the Retail price.



The **Remaining Stock Value (10)** is calculated from either the **Cost** or the **Sales** price by selecting one of the buttons below the field.

Use the **Show Photo** button **(11)** to select images of the item to display in Inventory Tracker. These are not stored in the software and must remain in their original location on your computer.



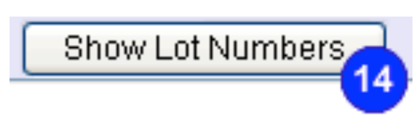
Keep track of when product is sold by entering the date by clicking **Today** or **Choose (12)**. You will be asked for the quantity and selling price.

If the item is **Non-Taxable** click the option provided **(13)**.

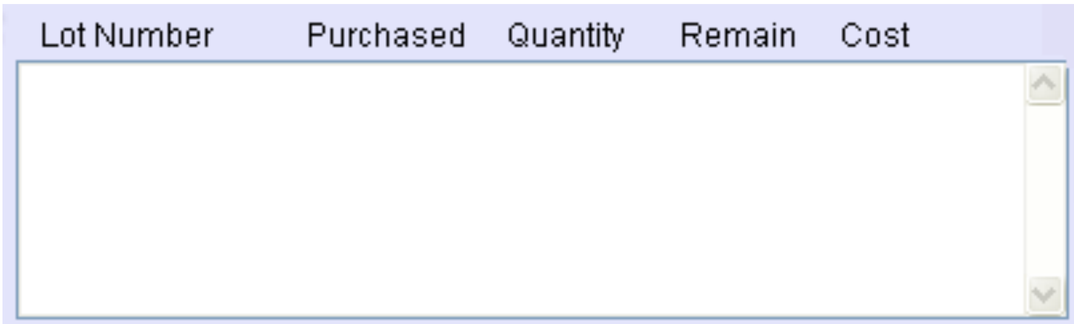
Whenever you add an inventory item to an invoice, it will automatically be added to the **Date, Qty & Price Sold** field. The **Remaining** field **(8)** will be automatically updated.

Lot Numbers

Each time you purchase more of the same item you can create a new **Lot Number** for that purchase. The **Show Lot Numbers** button (14) shows a field that contains the Lot Number, the date Purchased, the Quantity

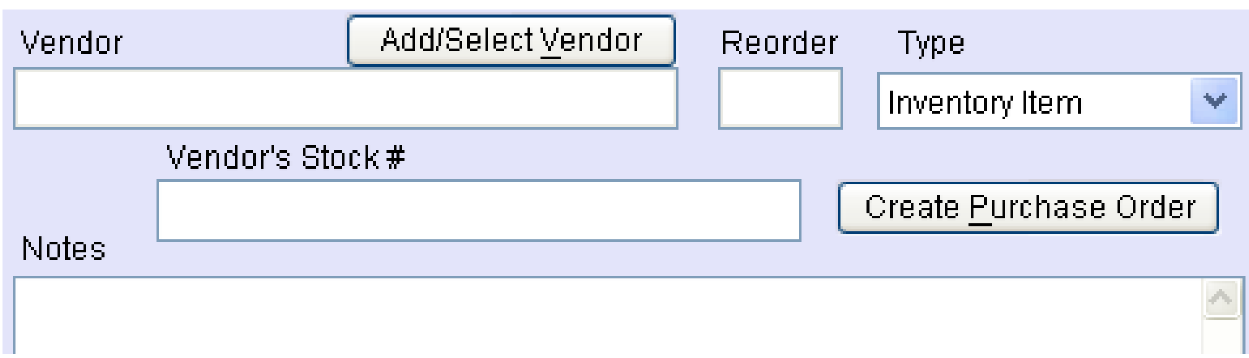


purchased, the number of that lot Remaining and the Cost per item of that purchase. There is also an **Add Lot Number** button which is similar to the **Add** button above the **Quantity** field (6).



If costs vary per lot then the average is displayed in the **Cost Each** field (5). If there is inventory remaining for several lots, when the item is selected in **Invoice Creator**, each lot will be displayed with the number remaining for you to choose from.

If the Padlock above the **Sales Price Each** field **(9)** is in the locked position, the retail price will automatically be used when you add an item to an invoice. Otherwise you will be asked for the selling price.



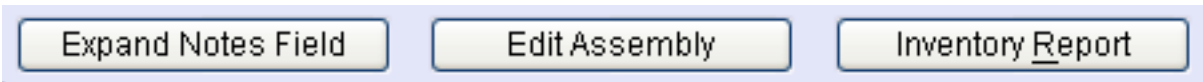
Specify a **Vendor** from a list you create by clicking **Add/Select Vendor**. You can add a **Reorder** point, which is the minimum quantity of the item you want to have in stock. Add the **Vendor's Stock #** to make **Creating a Purchase Order** an easy process.

The **Notes** field allows you to enter any important details or comments. You can use the **Expand Notes Field** button (below the Notes field) to enlarge this field.

The **Open Invoice Creator** button (below the Sales Price(s) menu) opens a new window where you can specify a customer (from Contact Tracker) and any number of items (from Inventory Tracker) and easily generate invoices, packing slips and labels.

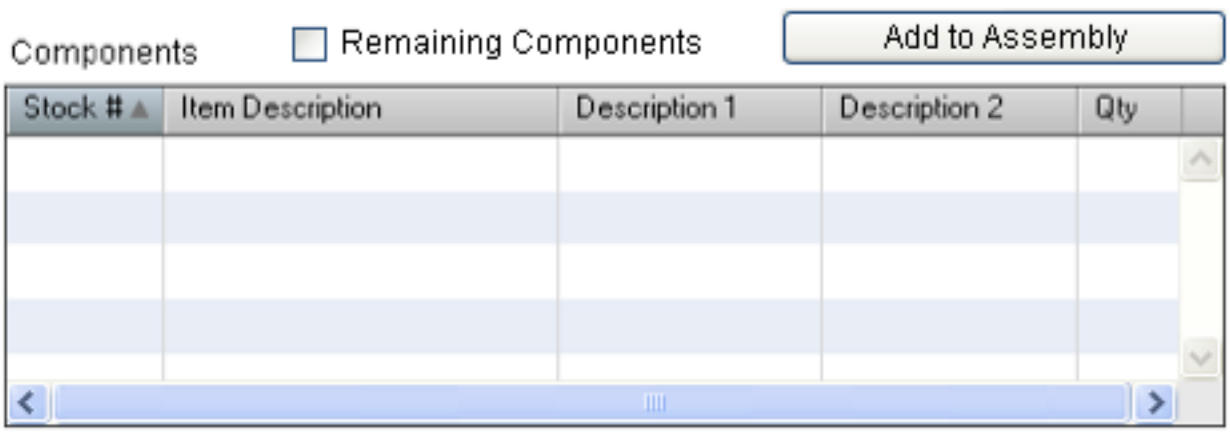
Assemblies

You can create an assembly of other Inventory Items by choosing **Assembly** when creating a **New** record or by selecting **Assembly** from the **Type** menu. An **Edit Assembly** button will appear at the bottom of the window.



Clicking **Edit Assembly** reveals a **Components** field and an **Add to Assembly** button. Clicking this button presents a list of Inventory items for you to add to the Assembly's **Components** list.

If the assembly consists of several of the same Inventory item, you can choose the item multiple times, which will increment the **Qty** column, or click the line in the **Components** field and click **Edit Quantity**.



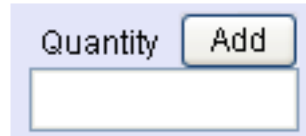
Adding or removing **Components** to the Assembly record changes the **Cost Each** amount **(5)**.

To remove an item from the **Components** list, click the item and then click the **Remove from Assembly** button that appears above the field.

There are two other buttons that appear when you click a line in the **Components** list. They are **Edit** and **View Item**. Click **Edit** to change the **Qty** or **Item Description**. Click **View Item** to go to the **Inventory Tracker** record for that item.

When these buttons are not visible you can replace the information in the 4th column of the table with the number of items **Remaining** (in stock) for each **Component**. by enabling the **Remaining Components** option.

Adding New Inventory to Existing Items

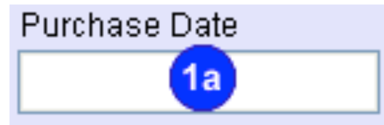


When you click the **Add** button above the **Quantity** field, you will be asked for the number of Items or Assemblies to add to inventory. For **Assemblies** this number will be multiplied by the Qty indicated for each item in the **Components** List and the **Remaining** inventory for each item in the **Components** list will be depleted by that number. If the number to be added is greater than the inventory for any Component allows, you will be prompted to decrease the number to be added.

You will also be asked if you want to add a new **Lot Number** for the new purchase.

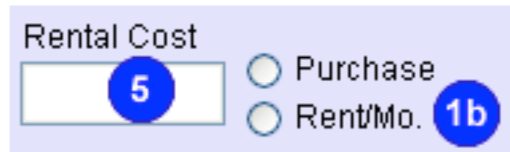
When you add any item to an Invoice Creator record the number **Remaining (8)** will be decreased and a new line will be added to the inventory record's **Date, Qty, & Price Sold** field **(12)**.

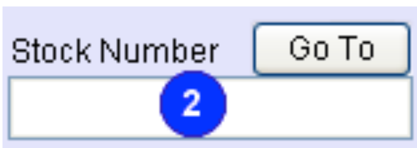
Rental Items



The Inventory Tracker screen looks a bit different when adding a **Rental Item**.

Use the **Purchase Date** field (1a) to keep track of when you acquired an item. If you rent or lease your Rental items from someone else, choose the **Rent/Mo.** option (1b) and the label on the date field will change to **In Service Date**.





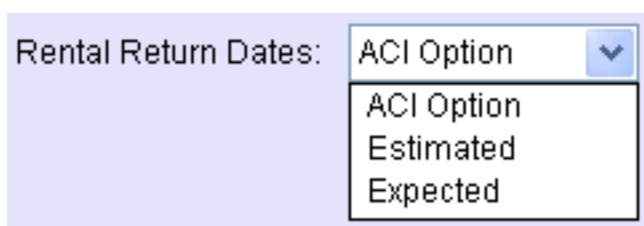
Each item is assigned a **Stock Number (2)**. Use the **Go To** button above this field to quickly go to the record for a specific **Stock Number**.

Enter the main **Item Description,** as with other item Types, in field provided. You will use the **Go To Another Item** button to display a list of other items to go to.

Additional item descriptions can be entered into two other fields. By default these are **Category** and **Location**, but these can be changed to **Serial Number** or used for any purpose. The **Add/Select Category** or Location buttons allow you to create custom lists and quickly pick from these.

Fill in the **Rental Cost** (5), the **Daily Rate** (6), the **Weekly Rate** (7), the **Monthly Rate** (8), and a **Flat Rate** (9). Click **Prefs** to change the additional item descriptions OR Flat Rate label to something else in the Inventory Tracker Prefs window.

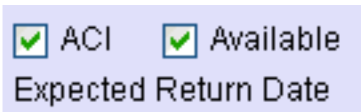
You can choose whether **Rental Items** have **Expected Return Dates or Estimated Return Dates** in the Inventory Tracker Prefs window. You have these three choices:



If you choose **Estimated**, an invoice for the Rental item can be Extended but no other invoices for that inventory item can be created until the item is marked **Available**.

When the item is returned, you need to remember to enable the Available option. When the Available option is enabled, the **Estimated Return Date** is either empty or displays the unavailability reason.

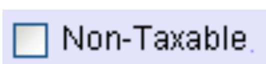
You can also choose the **ACI Option** which allows you to choose on a per item basis if the rental item is **Automatically Checked In (ACI)**, by enabling the **ACI option** that is displayed.



If you choose **Expected** (or enable the ACI option), then *you can create multiple invoices for a Rental item* because the item is expected to be returned (and will automatically be made **Available**) on the **Expected Return Date.**

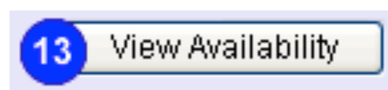
When a new record is created, the **Available** option (10) is automatically enabled. When you add the Rental Item to an Invoice the Available option is turned off and the **Estimated Return Date** (11) is displayed.

Use the **Show Photo** button (12) to select images of the item to display in Inventory Tracker. These are not stored in the software and must remain in their original location on your computer.

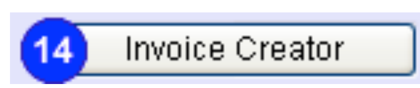


If the item is **Non-Taxable** click the button below the **Weekly Rate** field.

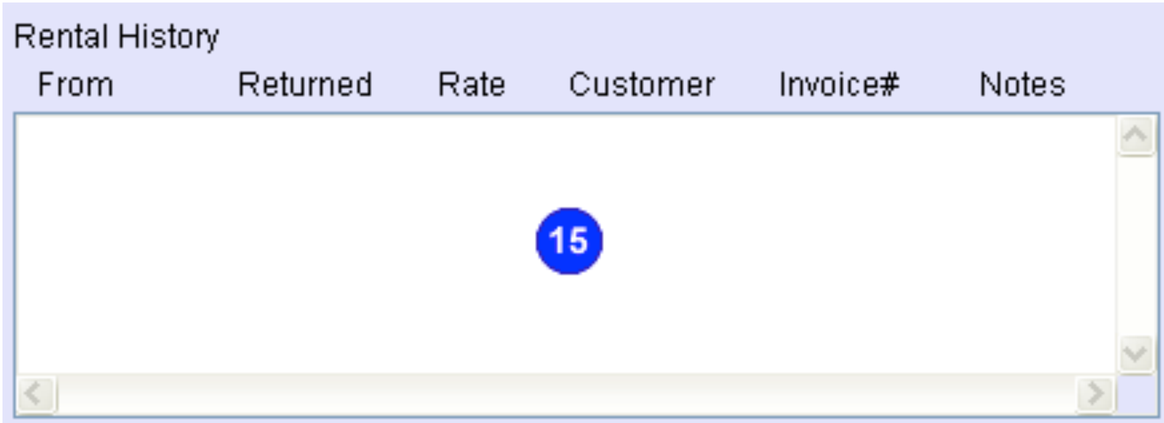
The **View Availability** button (13) appears on Rental item records which allows you to see at a glance when rental items are rented or reserved and when they are available. This is discussed in detail below.



The **Invoice Creator** button (14) opens a new window where you can specify a customer (from Contact Tracker) and any number of items (from Inventory Tracker) and easily generate invoices, packing slips and labels.



You can change a **Rental Item** into a **Rental Quantity Item**, or a normal Inventory Item if you decided to sell it. If an item has both a Rental History and a Sales History, a new button appears above the **Type** menu (16) to switch between the **Rental** and **Sales** views.

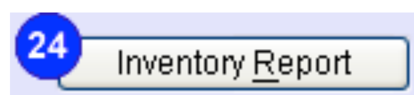


Whenever you add a **Rental item** to an invoice, it will automatically be added to the **Rental History** field (15). You will be asked for a **Rate**. If you choose **Daily** or **Flat**, you will be asked for an **Estimated Return** date, otherwise this date is calculated from the **Payment Date** in Invoice Creator. The From date, Est. Return date, Rate, Customer, Invoice # and a short Note are added to the **Rental History** field. The **Estimated Return Date** (11) is also automatically displayed.

Specify a **Vendor** from a list you create. The **Reorder** point is hidden for Rental items. Add the **Vendor's Stock #** to make **Creating a Purchase Order** an easy process.

The **Notes** field allows you to enter any important details or comments. You can use the **Expand Notes Field** button to enlarge this field.

When you return or retire the rental item, click the **Out of Service Date** field (23).

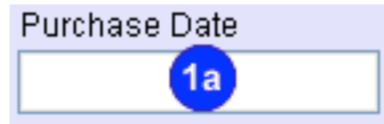


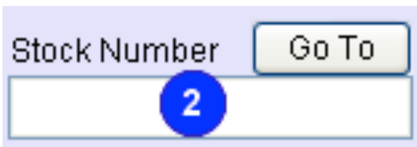
Use the **Inventory Report** button (24) to generate several different reports, including a **Rentals Status Report**. This report shows all of your Rentals including: Customer, Invoice # and Note (if rented), Item Description(s) and From and Est. Return dates if the Rental item is rented.

You can **Go To Inventory Record** OR **Create an Invoice** for a selected Rental Item OR **View** an existing **Invoice**, and **Extend** an existing **Rental Invoice**. You can view **All Rental Units, Only Available or Only Rented** inventory items.

Rental Quantity Items

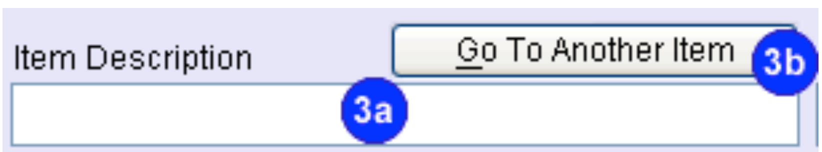
The Inventory Tracker screen looks a bit different when adding a **Rental Quantity** Item. The main difference is that there is a **Total Quantity** field, so you can rent multiple items at one time. The software will keep track of the number available for rent for each day.





Use the **Purchase Date** field (1a) to keep track of when you acquired an item. Each item is assigned a **Stock Number (2)**. Use the **Go To** button above this field to quickly go to the record for a specific **Stock Number**.

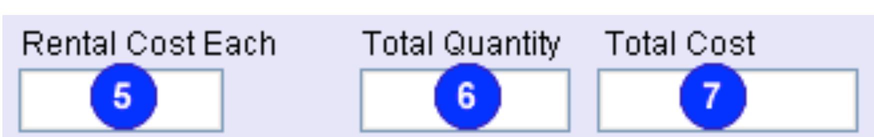
Enter the main **Item Description (3a),** as with other item **Types**, in field provided. You will use the **Go To Another Item** button **(3b)** to display a list of other items to go to.



Additional item descriptions can be entered into two other fields. By default these are **Category** and **Location**, but these can be changed to **Serial Number** or used for any purpose. The **Add/Select Category** or Location buttons allow you to create custom lists and quickly pick from these.

To change the names of these two description fields, just click the **Prefs** button and choose **Inventory Tracker Prefs.** Choose a new label from the **Description 1** and **Description 2** menus. You will find an **Other** choice so you can change these to almost anything you want. The labels on all records will be changed to the new names.

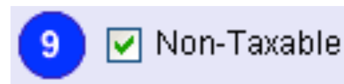
Next enter the **Rental Cost Each (5)** amount. This is the amount you paid for each item for rent. Also enter the **Total Quantity (6)** of items for rent. The **Total Cost (7)** is automatically calculated. You can add (or subtract) from the **Total Quantity** at any time by clicking the field and entering a new number.

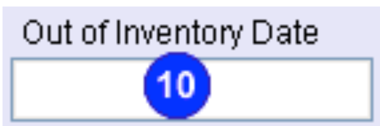


Fill in the **Daily Rate** (8a), the **Weekly Rate** (8b), the **Monthly Rate** (8c), and a **Flat Rate** (8d). You can change the Flat Rate label to something else if you wish. Just click the **Prefs** button and choose **Inventory Tracker Prefs.**

Unlike Rental Items, **Rental Quantity** Items only have an expected **Returned Date** which is displayed in the **Rental Quantity History** field when an invoice is created.

If the item is **Non-Taxable** click the button (9) below the **Total Cost** field.

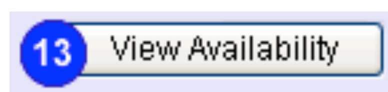




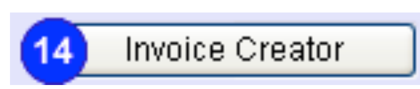
If you reduce the Quantity to 0 or want to remove the item from inventory, enter a date in the **Out of Inventory Date** field (10).

Use the **Show Photo** button (11) to select images of the item to display in Inventory Tracker. These are not stored in the software and must remain in their original location on your computer.

The **View Availability** button (13) appears on **Rental Quantity** Item records. This new window allows you to see at a glance when rental items are rented or reserved and when they are available. This is discussed in detail below.



The **Invoice Creator** button (14) opens a new window where you can specify a customer (from Contact Tracker) and any number of items (from Inventory Tracker) and easily generate invoices, packing slips and labels.



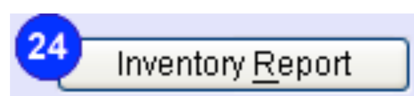
You can change a **Rental Quantity** Item into a normal **Rental Item**, or an Inventory Item if you decided to sell it. If an item has both a Rental History and a Sales History, a new button appears above the **Type** menu (16) to switch between the **Rental** and **Sales** views.

Rental Quantity records have **Rental Quantity History** fields that show the dates - **From** (date rented) and **Returned** date, the **Quantity** rented, the rental **Rate**, the **Total** rental amount, the **Customer** name, and the **Invoice #**. Creating an invoice automatically adds a line to this field.

Specify a **Vendor** from a list you create. The **Reorder** point is hidden for Rental items. Add the **Vendor's Stock #** to make **Creating a Purchase Order** an easy process.

The **Notes** field allows you to enter any important details or comments. You can use the **Expand Notes Field** button to enlarge this field.

Use the **Inventory Report** button (24) to generate several different reports, including a **Rentals Status Report**. This report shows all of your Rentals including: Customer, Invoice # and Note (if rented), Item Description(s) and From and Est. Return dates if the Rental item is rented.



You can **Go To Inventory Record** OR **Create an Invoice** for a selected Rental Item OR **View** an existing **Invoice**, and **Extend** an existing **Rental Invoice**. You can view **All Rental Units, Only Available or Only Rented** inventory items.

Adding Records to Inventory Tracker

1. Click the **New** button. You will first be asked if you want to create a **Blank Inventory Item, a Rental Item, an Assembly, a Duplicate** of the current record, or an Inventory Tracker record for **Another Type**. If you choose Another Type, the choices are **Service - Flat Rate, Service - Hourly,** or **Other Charge.** The **Date** and **Stock Number** will be filled in. You can make corrections to these fields if necessary.

There is an Invoice Creator Preference called **Ask for Type when displaying Product List**. If you choose **I only have Rental Items**, then you will not be asked if you want to create some other type of item when you click **New** in Inventory Tracker.

In Inventory Tracker Preferences you will find controls for changing two of the description fields, an **Enable Assemblies** option, and **Add Tax** default settings for each inventory Type.

2. You will be prompted to enter the **item Description** as well as the two other **Descriptions** (with what ever name you have given to the fields.) There is only one Description field for Service or Other Charge inventory types.

3. For **Rental Items**, enter the **Rental Cost** and indicate if it is a **Purchase** price or a **Rent/Mo** price. For **Rental Quantity** Items, enter the **Rental Cost Each** and the **Total Quantity** of items for rent. The **Total Cost** is calculated. Then enter the **Daily Rate, Weekly Rate, Monthly Rate,** and **Other Rate**. This last rate can be changed to anything in the Inventory Tracker Prefs window.

For **Inventory Items** you will be asked for the **Cost Each** and **Quantity**. If you have an unlimited quantity or you always order after you receive an order, click the n/a button above the **Quantity** field.

The following does not apply to Service or Other Charge inventory types. Rentals have some of these features.

You will also be asked if you want to add a **Lot Number** for the initial quantity. Lot numbers can be used to keep track of purchases with different costs, and are listed in the **Date, Qty & Price Sold** field so that you can easily track who was sold different lots.

4. Next you will be asked for a **Sales Price**.

5. Enable the **Non-Taxable** option if you do not charge tax on this inventory item.

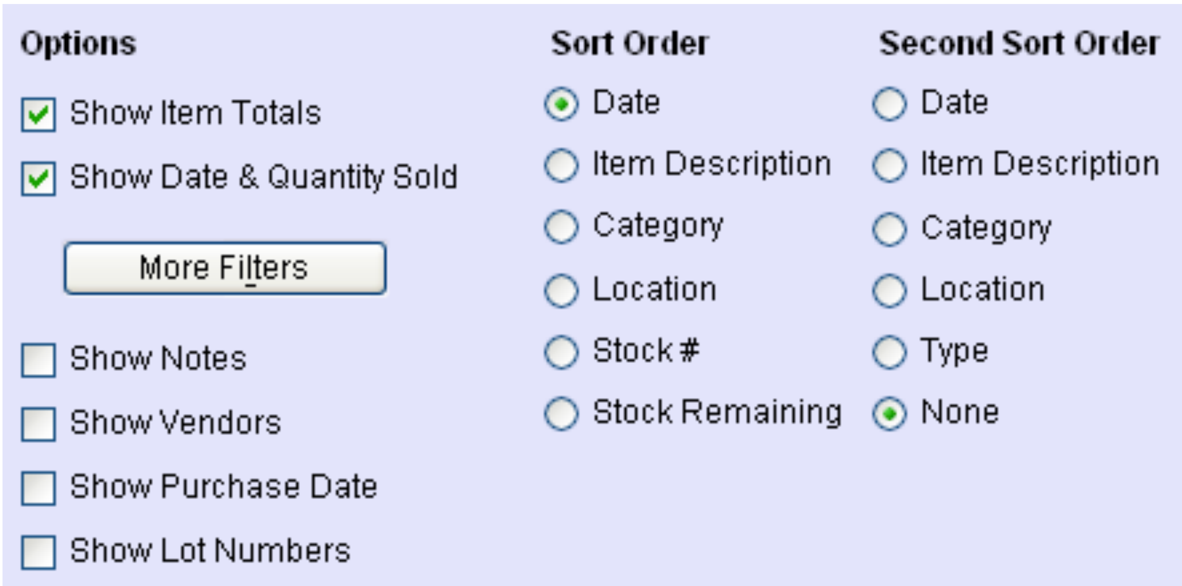
6. Click **Add/Select Vendor** button and create or choose a vendor.

7. Enter a **Reorder** point and the **Vendor's Stock #**.

8. Click **Show Photo** to add an image to the record.

Inventory Tracker’s Report Options

Use the **Inventory Report** button (in the lower right hand corner) to generate several different types of Inventory Reports. Here is what part of the options screen looks like:

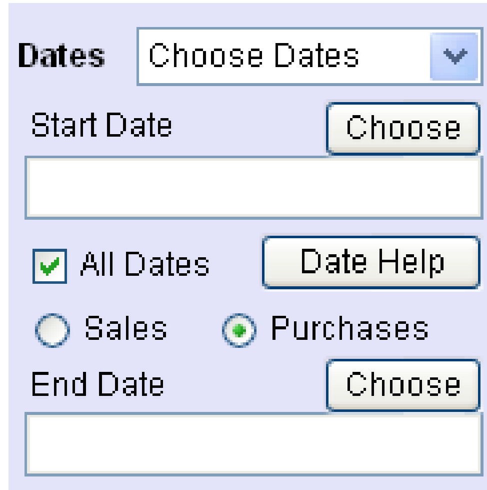


The **Date, Cost, Quantity** and **Item Description** are included in all reports. You may also add any of the following **Options** by clicking the appropriate checkbox in the Inventory Report Options window: **Show Item Totals**, **Show Date & Quantity Sold, Show Notes, Show Vendors, Show Purchase Date,** and **Show Lot Numbers.**

Clicking **More Filters** reveals **Show All, Show Only Items Sold, Show Only Items NOT Sold as of the End Date, Only Items Needing Reordering,** and **Only Items Needing Back Orders Shipped.**

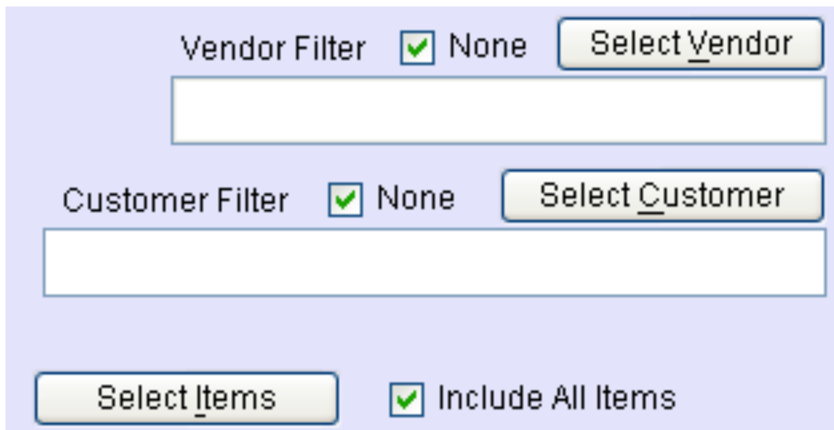
The list can be sorted by clicking the **Sort By** radio buttons. The choices are **Date, Item Description, Description 1** or **Description 2** (or whatever you changed these labels to), **Stock #,** and **Stock Remaining**. You can specify a primary **Sort Order** and a **Secondary Sort Order** which includes **Type** and **None.**

You choose a date range from the **Dates** menu, specify a **Start Date,** and an **End Date,** or select **All Dates** before clicking the **Create Report** button.



Normally the **Date** refers to the date sold, otherwise the **Date** refers to the **Purchase Date** field at the top left of the Inventory Tracker window. You can specify which of these date you want to use by clicking **Sales** or **Purchases.**

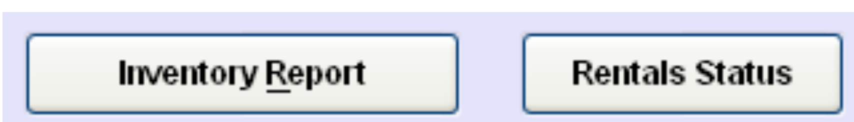
Select one or more **Vendors** from a list by clicking the **Select Vendor** button or click the **None** button for a complete report (no Vendor Filter).



You can also filter the report by a specific **Customer**.

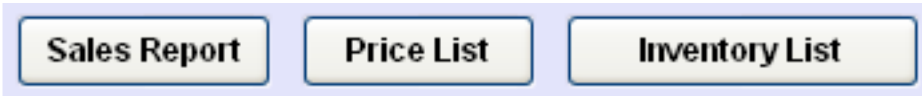
You can select one or many specific items from the list by clicking **Select Items** or click the **Include All Items** button for a complete report.

Click the **Inventory Report** button to generate a regular inventory report.



Equipment Rental Tracker Plus has a special **Rentals Status** report which lists only **Rental Items** and who they are rented to, the invoice #, and when they are due back. For any item in the list you can **Go To the Inventory Record**. For available items you can **Create an Invoice**. For rented items you can **View Invoice** or **Extend Rental**. You can display **All Rental Items, Only Available, or Only Rented** items. You can also **Sort** the report by **Customer**.

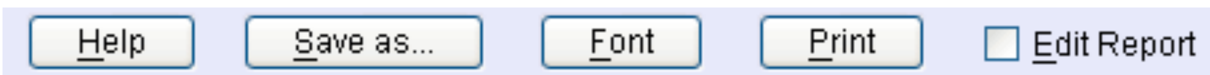
To generate a report on just sales of inventory, click the **Sales Report** button, or print a quick **Inventory List.**



To generate a report of just descriptions, stock numbers and sales prices of inventory, click the **Price List** button.

Click any item description in the report to go directly to that item's record. If you click a line in the report and nothing happens, you need to click the line with the date, cost, quantity and item description.

Along the bottom of the report window are five buttons and an **Edit Report** option. The **Close Window** button is not pictured.



Use the **Edit Report** option to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

The font face, size, and line height of the report output can be modified by clicking the **Font** button.

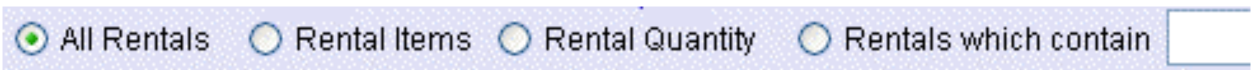
You can print the Inventory Report by clicking the **Print** button.

To save the list as a text file for importing into another program click the **Save as...** button. Click **Help** for more information about the report options.

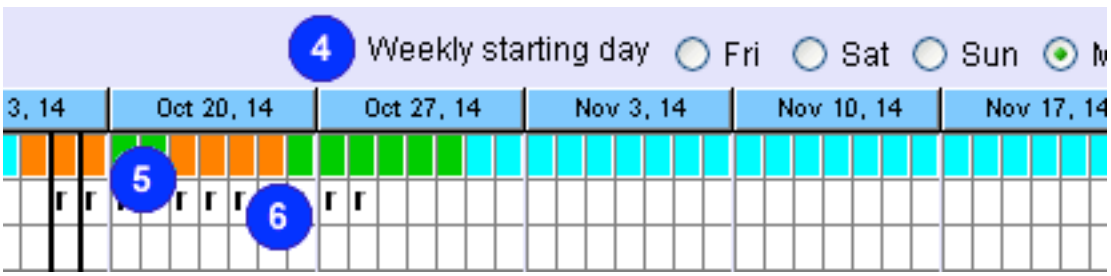
Equipment Rental Availability Checker

The **Availability Checker** (which is accessible from Rental Inventory items - see above) gives you a graphical view of the Availability of all your rental items in a time line fashion. **Item #s and Descriptions** are displayed in the first column.

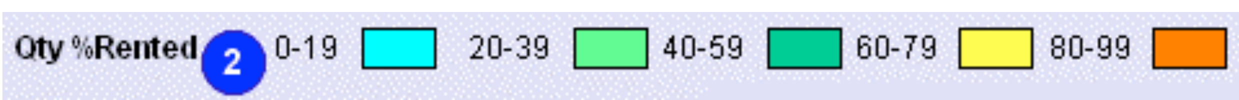
You can display only **Rental Items**, only **Rental Quantity** Items, or **All Rentals**, or only those that contain a search term that you enter. Click **Refresh** to update the availability table.



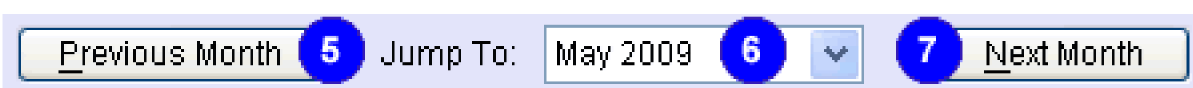
The starting date for each week is displayed in the column headers. The current date is indicated by two vertical lines. You can change the **Weekly starting day(4)**



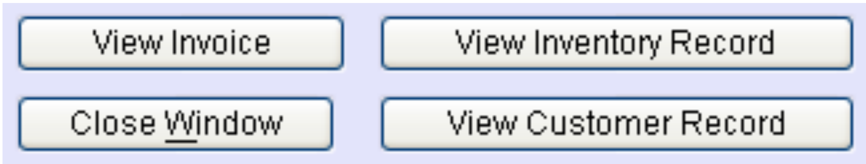
Rental Items are shown as (6) Rented (r), Not Available (x) or Available (white). **Rental Quantity** items are shown as a percentage of the total available (5). You can change the colors that represent the different percentages by clicking the colors.



You can change these dates by clicking the **Previous Month (5)** or **Next Month (7)** buttons, or by choosing a month from the **Jump To (6)** menu. You can quickly return to the current month my clicking the **This Month** button.



If there are more records available then can be displayed at one time, the First, Page Up and Page Down and Last arrows are shown to the right of the table. The range of records displayed and the number of records available are shown in a field near the bottom right corner of the window.



After selecting a line in the table, you can click **View Invoice, View Inventory Record, or View Customer Record.**

There is also a **Print** button and a **Report** button that displays the **Rental Schedule Report**.

Rental Schedule Report

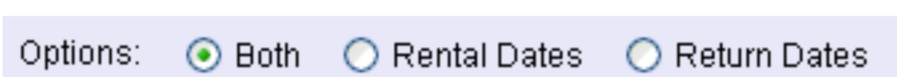
The Rental Schedule Report (only available from the **Availability Checker** window**)** provides you with a table that shows when each of your rental items will be rented or returned and any deposits or balances that are due.

Rental Date	Return Date	Customer	Item Description	Dep. Due	Bal. Due	Invoice #
Sun, Sep 15, 201	Sun, Oct 6, 2013	White Unlimited, #10(	#1004, A Widget for R	$0	$75	#1005

You can choose a date range from the **Dates** menu or enter dates directly into the **From** and **To** fields.

You can display only **Rental Items**, only **Rental Quantity** Items, or **All** Rentals (3a).

You can show just **Rental Dates, Return Dates, or Both** that fall within the date range.

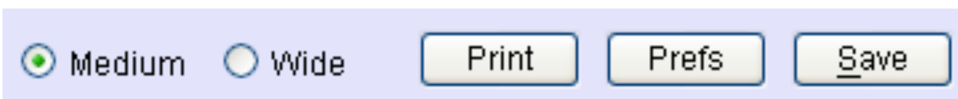


You can also limit the report to just items that are to **Due to Be Returned Within** the number of **Days from Today** that you specify.

You can sort the table by clicking any of the column headers and change the column widths by dragging between the header buttons.

After selecting a line in the table, you can either click **View / Edit Invoice** or **View / Edit Inventory Item.**

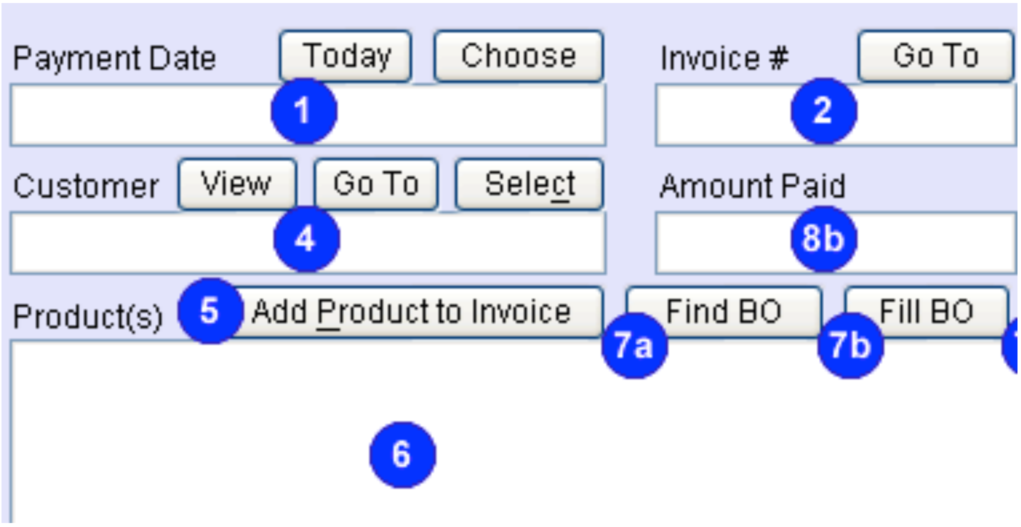
If the number of records is greater than the number of lines in the table, a scroll bar appears to the right of the table.



You can **Print** the visible part of the table or **Save** the complete table as a text or html file. If you choose **HTML** you can view or print the entire table in your browser or upload it to your website. You can change the colors of this window (just like all the other windows) by clicking the **Prefs** button.

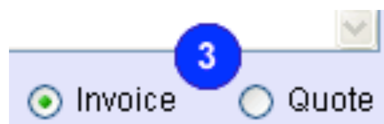
You can change the width of the window (and all of the columns) by choosing from the options **Medium or Wide.**

Invoice Creator



With this program, you can create customized invoices from products in Inventory Tracker and customers in Contact Tracker.

When you create a **New** record an **Invoice #** is generated. You can change this number by clicking the field and entering (or scanning) in a new number.



Near the middle of the right side of the window are Quote and Invoice options (3). If you choose **Quote**, an item added to the invoice (5) is not removed from inventory until the **Invoice** button (3) is clicked.

If no **Payment Date (1)** is specified when you click **Add Product to Invoice (5)** you will be asked for an **Invoice Date**.

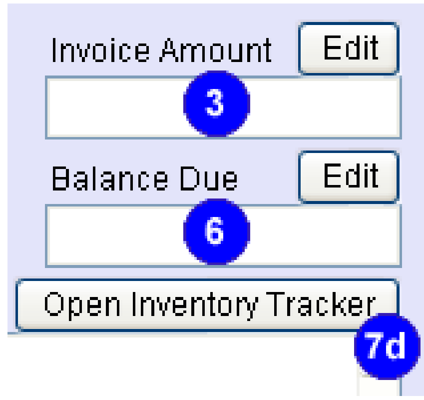
Choose a **Customer (4)** from a list of people in Contact Tracker by clicking the **Select** button above this field. Click the **View** button above this field to go to the Contact Tracker record for that customer. Click the **Go To** button above this field to go to the first or last Invoice for that **Customer**.

Next, choose one or more **Product(s)** from Inventory Tracker by clicking the **Add Product to Invoice** button **(5)**. You will first be asked if you want to add an **Inventory Item** (including Assemblies) or an **Other Item** type.

If you choose **Inventory Item** you will next be asked if you want to **Enter or Scan** a Stock Number or pick an item from a list. You can go directly to this option by clicking the **Add Product to Invoice** button with the ctrl or command key held down or by pressing F2.

You will be asked for the number sold and the selling price. The **Product(s)** field **(6)** displays all the products ordered by the **Customer** for this **Invoice #**.

You can use the **Find BO** button **(7a)** to determine if there are back ordered items to be shipped. Then click the **Fill BO** button **(7b)** to easily create a new invoice with the backordered items.



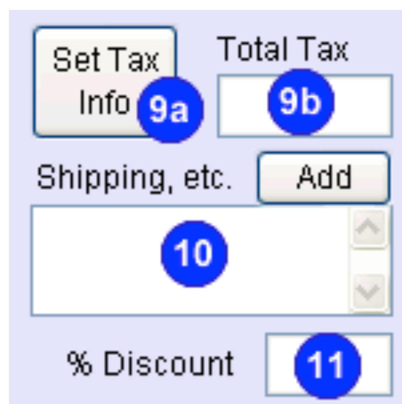
If you click a line in the **Product(s)** field and then click the **Open Inventory Tracker** button **(7d)** you will be taken to the Inventory Tracker record for that item.

The **Quantity** ordered is automatically deducted from the Inventory Record and added to the **Date, Qty & Price Sold** field in Inventory Tracker.

The total is shown in the **Invoice Amount** field **(3)**. Enter the **Amount Paid (5)** and the **Balance Due (6)** will be calculated.

When you enter a payment in the **Amount Paid** field **(8b)** you will be asked for the method of payment. If the invoice is paid in full, the method and date are entered into the **Notes** field.

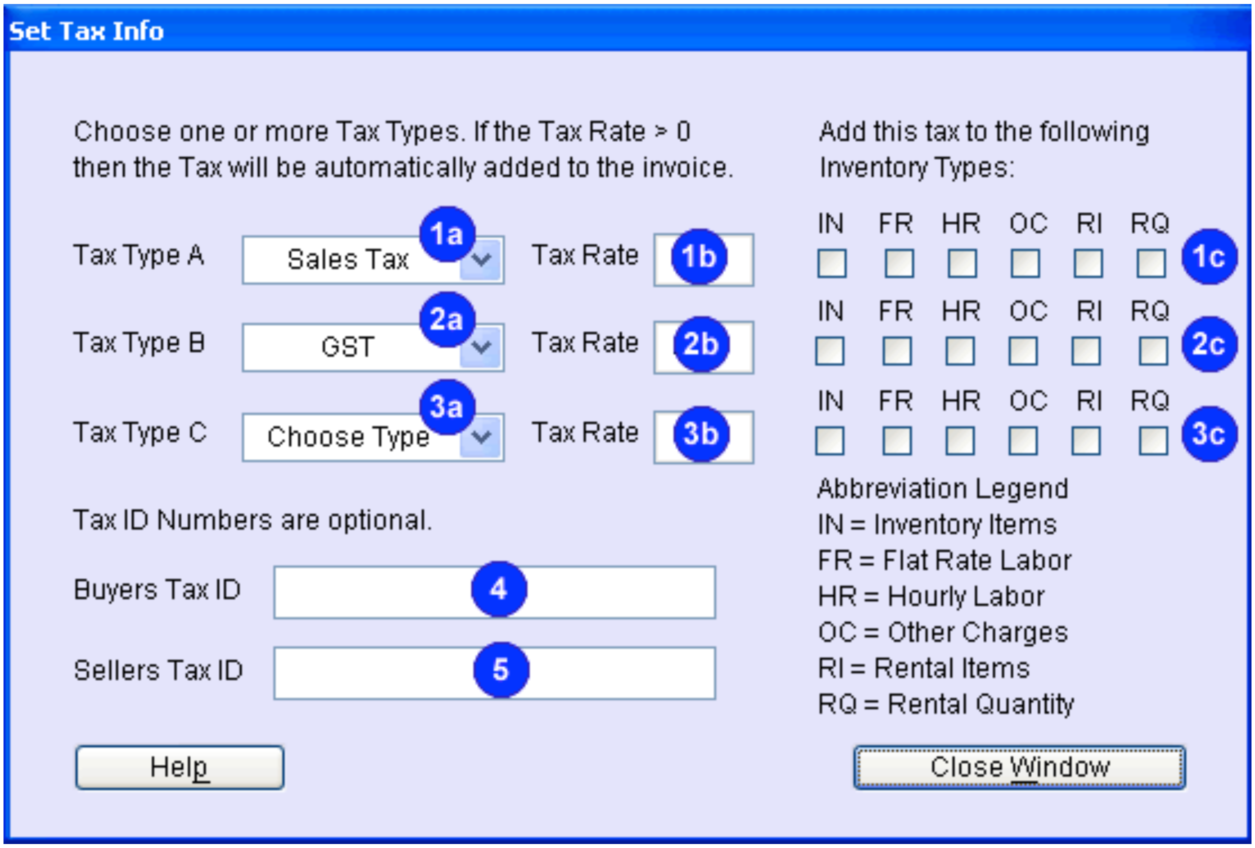
Partial payments and their methods are automatically added to the **Partial Payments** field **(8d)**. When subsequent payments are made, you must return to the record for the invoice, enter a new **Payment Date (1)** and the new **Amount Paid (8b).** The Payment **(8d)** will be applied and a new **Balance Due (8c)** calculated.



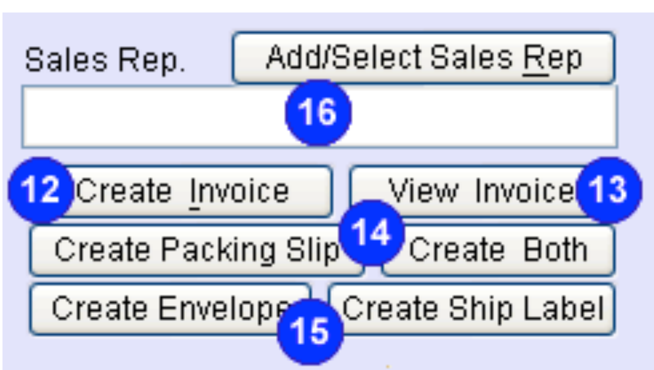
You can add Tax by clicking the **Set Tax Info** button **(9a)**. The total tax is automatically calculated and displayed in the **Total Tax** field **(9b)**.

Add any **Shipping & Handling** charges directly to this field **(10).**

You can discount the amount for products sold by entering a percentage into the **% Discount field (11).** You can choose which inventory Types get discounted and if the Sales Tax should be applied before or after the discount by clicking **Prefs** and choosing **Invoice Creator Prefs.** You will find these options at the bottom of the Invoice Creator Preferences window.



In the **Set Tax Info** window you can specify up to three different **Tax Types (1a, 2a & 3a)** (including Sales Tax, GST, VAT or any other tax), each with their own **Tax Rate (1b, 2b & 3b).** You must choose which **Inventory Types** (see the Abbreviation Legend to identify these options) you want to apply each tax to **(1c, 2c & 3c)**. You can also specify the **Buyer's Tax ID (4)** and the **Sellers Tax ID (5)** which are then added to the Invoice.



Choose a **Sales Representative (16)** from a list you create.

Clicking the **Create Invoice (or Quote) (12)** button totals all amounts and creates an invoice that is easy to print or email. If there is no **Amount Paid**, you will be asked if you want to add a **Payment**. If no payment is added, the **Invoice Date** will be used. View a previously generated Invoice by clicking the **View Invoice** button **(13)**.

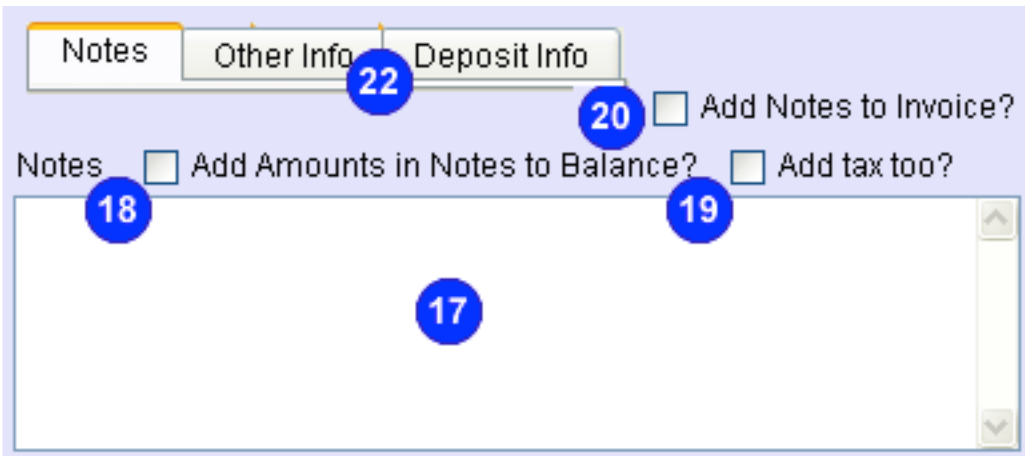
You can also **Create a Packing Slip (14)** or both an Invoice and Packing Slip by using these buttons.

Easily create an **Envelope** or **Shipping Label** with these buttons **(15)**.

You can also use these F Keys instead of clicking the associated button:

F1 = New and/or Select Customer	F2 = Scan or Enter a Product's Stock Number
F3 = Create Invoice (or Quote)	F4 = Create Packing Slip
F5 = Create Envelope	F6 = Create Shipping Label
F7 = Open Inventory Tracker	F8 = Enter a Payment Amount

Choose a **Sales Representative (8)** from a list you create.



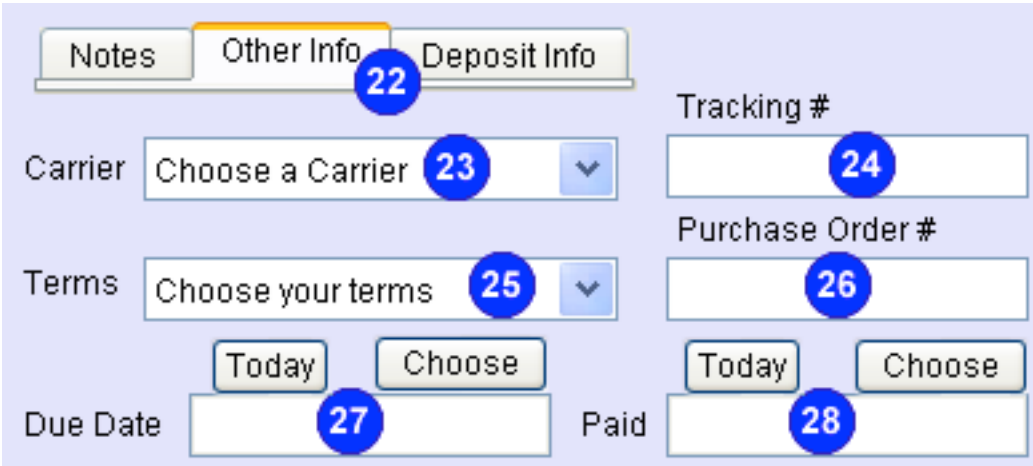
Clicking the **Notes** tab reveals the **Notes** field **(17)** and three other options.

You can add amounts in the Notes field to your invoice total by clicking the **Add Amounts in Notes to Balance?** button **(18)**. The Notes will be added as an **Other Charge**. If these amounts are taxable, just click the **Add tax too?** button **(19)** above the Notes field.

Enable the **Add Notes to Invoice?** option **(20)** to add the Notes to the Invoice without adding any numbers in the Notes field to the Invoice Amount.

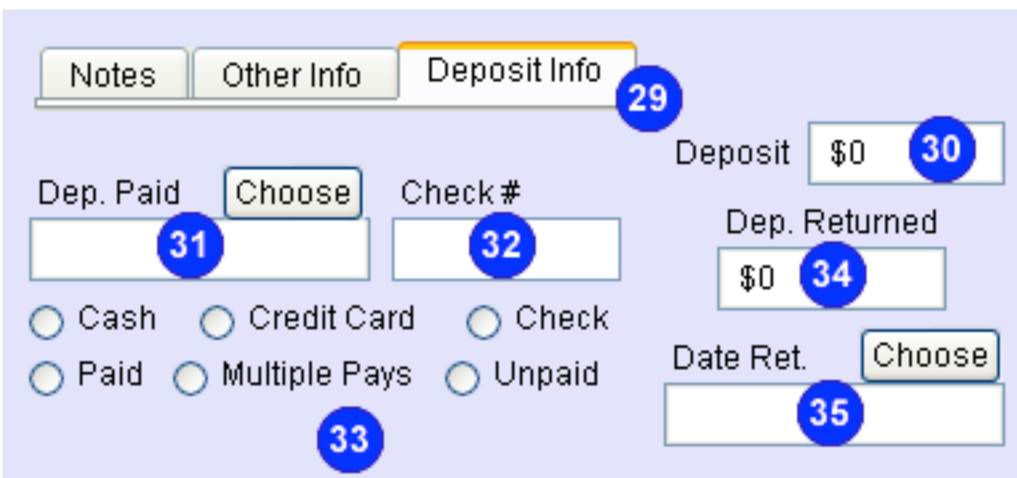
The **Cust Account** button (36) opens a new window which displays all the Invoices for and Payments made by the Customer.

Create reports on all the invoices in the database with one click of the **Invoice Report** button **(37)**.



Clicking **Other Info (22)** reveals a **Carrier** menu **(23)**, and a **Tracking #** field **(24)**, You can create a list of Carriers to choose from and add a Tracking Number to the Invoice.

Choose your payment **Terms** from the menu **(25)**, add a **Purchase Order # (26)**, and a **Due Date (27)** to your invoice. When the invoice is paid, click the **Today** or **Choose** button above the **Paid** field **(28)**.



Click the **Deposit Info** tab (29) to reveal the following fields.

Click the **Deposit** field (30) to enter the amount of the Deposit.

Click the **Choose** button above the **Dep. Paid** field (31) to select the date the Deposit was Paid. You can indicate how the Deposit was paid by using the options below the field (33). You can also accept **Multiple Pays** (payments) for a Deposit.

When the Deposit is returned, click the **Choose** button above the **Date Ret.** field (35) and enter the amount returned in the **Dep. Returned** field (34).

Adding Records to Invoice Creator

1. Click the **New** button. The **Payment Date** and **Invoice #** will be filled in. Make corrections if necessary by using the buttons above these fields.

2. You will be presented with a list of customers from Contact Tracker to choose from. If you want to change the customer, click the **Select** button above the **Customer** field and add or select a name from the Contact Tracker list.

3. Click **Add Product to Invoice** and choose an item to add to the **Product(s)** field. When prompted, enter the number sold and the price for each item. The **Invoice Amount** and **Balance Due** will be automatically filled in.

4. Enter any of three **Tax Types** by clicking **Set Tax Info.** There you can also specify the **Buyer's Tax ID** and the **Sellers Tax ID** which are then added to the Invoice.

5. Enter any **% Discount**. Enter **Shipping & Handling** information by typing directly into the field. Any numbers will be added to the **Invoice Amount** and **Balance Due**.

6. Choose a Sales Representative by clicking **Add/Select Sales Rep.**

7. Add any **Notes** and indicate if you want to **Add Amounts in Notes to the Balance?** or if you just want to **Add the Notes to the Invoice?**

8. Click **Other Info** and choose a **Carrier**, add a **Tracking #** and **Purchase Order #.**

9. Click **Deposit Info** and enter information about any security deposit.

10. Choose your payment **Terms** from the menu provided, and enter a **Due Date.**

11. If you have received a payment for this order, enter an **Amount Paid**. The **Invoice Amount** and **Balance Due** fields are automatically updated. If the amount is less than the Balance Due, it will be added to the **Partial Payments** field. If the amount is paid in full, the current date will be added to the **Date Paid** field.

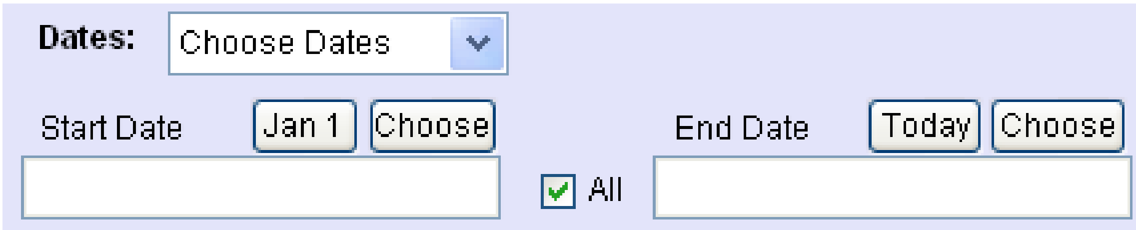
12. Click the **Create Invoice, Create Packing Slip** or **Create Both** button. See the section below on **Editing the Invoice Header** for more information about options in the Invoice window.

13. In the Invoice window you can **Print** the invoice or **Copy** it to your Email program.

14. Click the **Cust Account** button at the bottom of the window to view a **Customer Account** table that shows all invoices and payments, with subtotals and totals, that you can print.

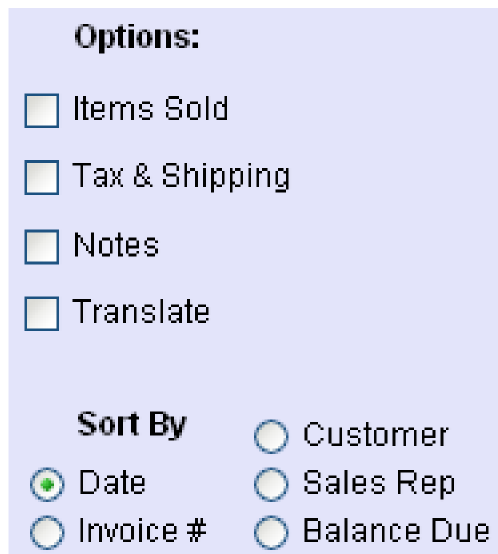
Invoice Creator's Report Options

Easily create a list of invoices by clicking the **Invoice Report** button in the Invoice Creator window.



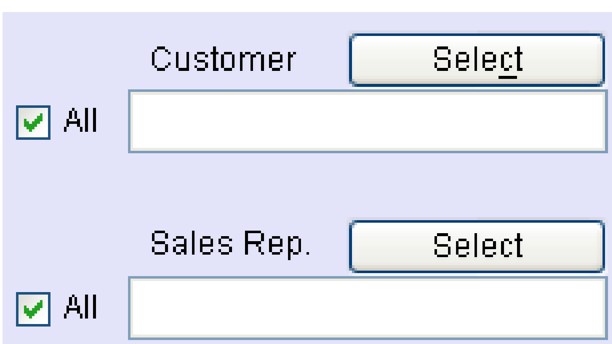
You can select a date range from the **Dates:** menu, or list all invoices, or just those between the **Start Date** and the **End Date**. Use the buttons above these fields to adjust the dates, or click the **All** button between the fields to include all dates.

Options provided include showing **Items Sold, Tax & Shipping** information, or **Notes**.



The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Date, Invoice #, Customer, Sales Rep.** and **Balance Due**.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.



You can also limit the report to particular Customers or Sales Representatives by clicking the **Select** button above either of these fields.

You can edit the report, if necessary, by clicking the **Edit Report** button. Click the button again to restore the ability to click a line to go to a record.

Editing the Invoice Header

In the Invoice window, you can edit the text in the header by replacing the existing business name, address and phone info with yours. Use the **Print** or **Copy to Email** buttons to send your invoice to your Customer. There is also a **Prepare Envelope** feature which displays the Customer's name and address ready to print on an envelope.

You can change the **Font** of the Invoice text**,** or of any of the header text by clicking the **Edit Header** button in the lower right corner. A group of buttons will appear as pictured above. Click the **Edit Header** button again to hide these buttons.

To modify the Font or style or size of the Name text, click the **Name Font** button. To modify the Font or style or size of the Address text, click the **Address Font** button.

You can **Import a Logo** or display your company name and address (or all three). To begin with, all three are visible. You can hide or show the labels by clicking the **Labels** option. You can hide the **Logo**, **Name** or **Address** by clicking one of these options.

The border that surrounds the header area may be hidden by clicking the **Border** option, but no elements of the header can be placed outside this border.

To import a logo, click the **Import Logo** button and choose a .gif, .jpg or .png file to display. This file must remain in the same location on your computer and will be automatically resized to 548 pixels wide or 100 pixels in height, if they are too large.

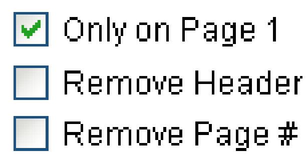
To add a Company Name or Company Address type directly into the fields provided.

To allow movement of the logo or fields, click the **Reposition** button. Click the button again to lock the positions and allow editing of the fields again.

Click the **Preview** button (not shown) to hide the field borders and labels and see how the header will look when printed.

If you have several businesses and need multiple headers, you can save a header by clicking **Export Header**. Then when you need to switch to a previously saved header, click the **Import Header** button and locate the saved file.

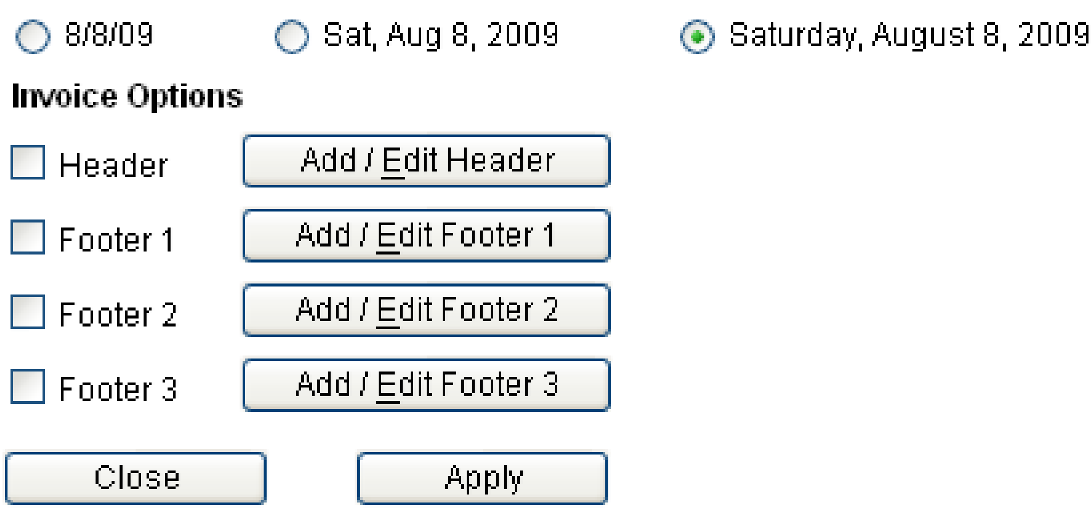
To hide the header on subsequent pages, choose the **Only on Page 1** option.



The **Remove Header** button eliminates the Header from the printout completely. **Remove Page #** does just that.

At the top right corner of the report window there are three buttons. **Hide Prices** removes all item prices from the Invoice.

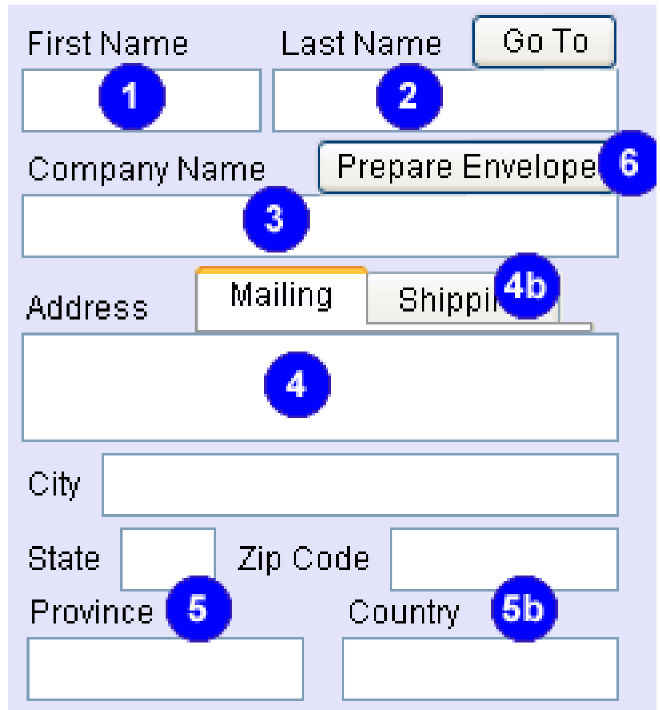
The **Options** button shows the following controls and options:



The top three options allow you to choose the date format used in the Invoice.

You can add an optional **Header** or any of three **Footers** to the Invoice by clicking **Add/ Edit Header or Add/Edit Footer** and typing the information you want included when the corresponding checkbox is enabled.

Contact Tracker

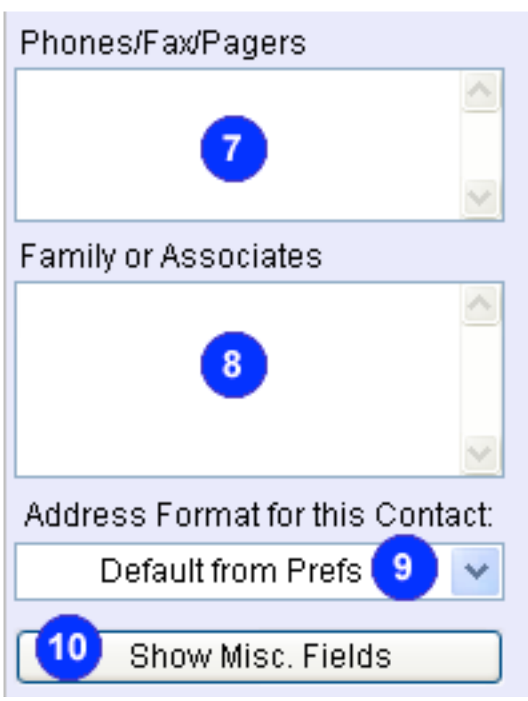


Each record in <u>Contact Tracker</u> consists of fields for the contact's:

First Name (1)
Last Name (2)
Company Name (3)
Mailing and Shipping Addresses (4 & 4b)
City, State, and Province (5)
Zip Code, and
Country (5b)

You can switch between **Mailing** and **Shipping** addresses by using the tab buttons **(4b)**.

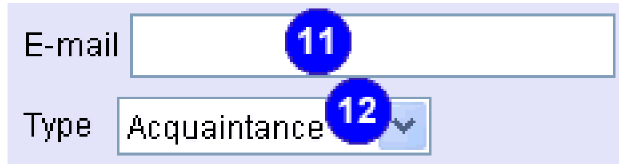
To quickly prepare an envelope for printing, choose **Mailing** or **Shipping** and then click **Prepare Envelope (6)** located above the **Company Name** field. You can add your return address or make other changes before clicking the **Print** button in the resulting window.



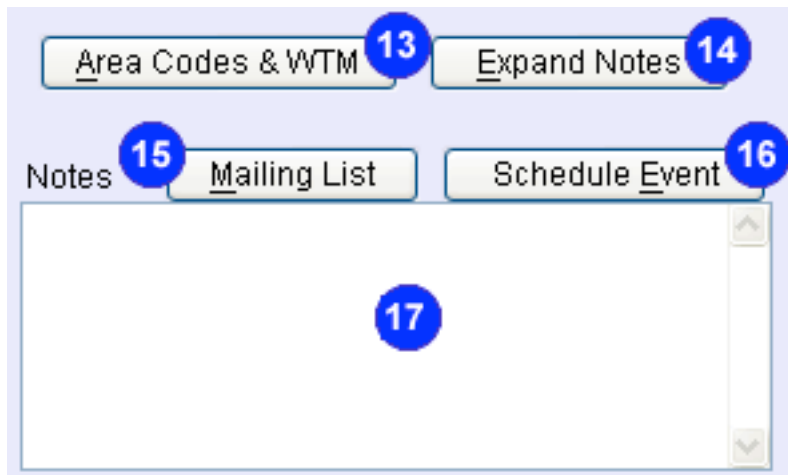
You can also add information such as **Phones/ Fax/ Pagers (7)**, the names of **Family** or **Associates (8)** and any **Notes**.

The **Address Format for this Contact** menu **(9)** determines the order and format of the City, State, Province, and Zip or Postal Code when printed. There is a similar menu in the **Formats** section of **Prefs** that becomes the **Default**, but you can specify a different format for each contact if you wish.

There are also four miscellaneous fields**,** accessed by the **Show Misc. Fields** button **(10)** which you can use for any purpose. To change the labels for these fields, click the **Change** button above them and enter a new name. You can sort the records or reports on any of these fields, in addition to several others.



Enter an **E-mail** address **(11)** in the field provided. Below this field is a Contact **Type** menu button **(12)**. There are 11 Types to choose from including: **Acquaintance, Agent, Client, Customer, Employee, Family, Friend, Guest, Owner, Sales Rep., and Vendor**. If the Type Customer is chosen then a **Customer Number** field will appear.   If the Type Vendor, Agent or Sales Rep. is chosen then a **Tax ID#** field will appear. If Employee is chosen then the **Tax ID#** and an **Employee #** field will appear. If the Type Owner is chosen then the **Tax ID#** and a **Management Fee** field will appear.

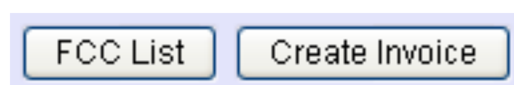


Click the **Area Codes & WTM** button **(13)** to access either the **Area Code** lookup tool or the **World Time Map** where you can see at a glance what time it is in any part of the world.

You can keep any amount of notes in the **Notes (17)** field. To enlarge the Notes field, click **Expand Notes (14)**.

The **Mailing List (15)** is discussed on the next page.

The **Schedule Event (16)** button creates a new record in Schedule Tracker with the **Contact** as the **Event**.



The Frequently Called Contacts **(FCC List)** button opens a new window where you can add contacts to a list. This window has a special notes field, a **Last Contacted** field and buttons to manage the list. You can also click **Create Invoice** to create a new Invoice Creator record with the current contact entered in the **Customer** field.

View a complete list of contacts by clicking the **List Contacts (19)** button. You can easily sort and display only specified contacts. You can also save them to a text file or print them.

You can add new records or edit the information for any record at any time.

Sending Form Letters to a Mailing List

When you click the **Mailing List (13)** button, you are presented with a Contact Chooser window, where you can choose which contacts to send a form letter. If you want to send the letter to all of your contacts, click the **Select All** button. Or click the **Select** button beside the name of each contact you want to send the letter.

The **Mailing List** feature applies to **Mailing Addresses** only.

If you want to select all contacts from a particular city, state, zip code, or country, or all contacts of a particular Type, click the **Select Special** button. You will then be presented with a dialog where you can choose the field and enter the **Text to Match**. For example, if you want to select all contacts in Oregon, click the **State/Province** button, enter OR in the **Text to Match** field and then click the **Select** button.

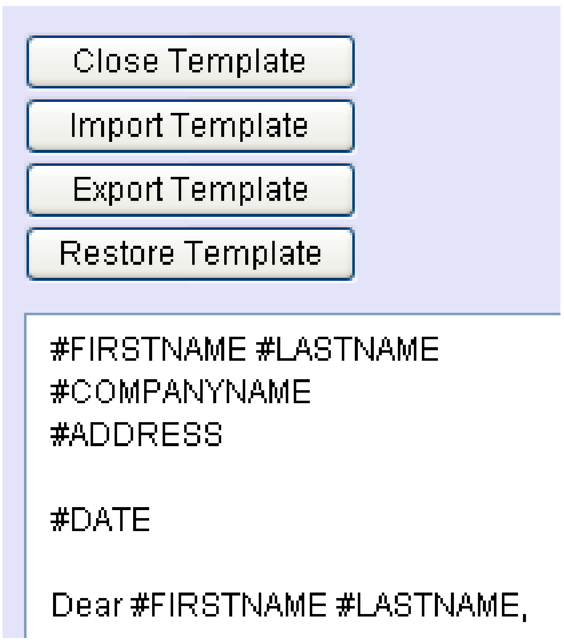
You can also select all contacts that have a particular word in one of the **Miscellaneous** fields or the **Notes** field.

Click the **Export** button in the Contact Chooser window save a list of 1) names and addresses for use in another program OR 2) a list of names and addresses you can print as **Labels** OR 3) a list of names and email addresses. Click Help in the Contact Chooser window for more information.

After making your selections, click the **Create Form Letter** button. The Send Form Letters window and the Mailing List Control window will open.

To change the name and address in the header, just select the text and type your correct info. Click **Help** for more information about editing the header and adding a logo.

At the top right of the Send Form Letters window, you will see an **Edit Form Letter Template** button. Click this button to view and edit the template for the form letter. You can make your letter as long as you want.

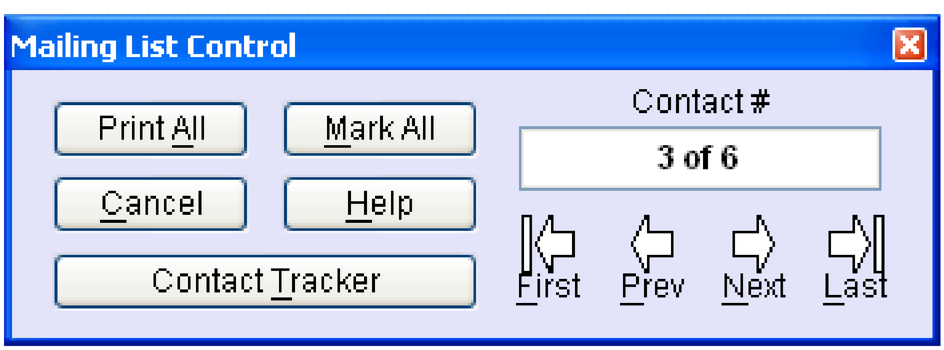


Wherever you want the program to insert the contact's first name, type #FIRSTNAME. If you want the program to insert the contact's last name, type the #LASTNAME tag. Wherever you want the contact's address, type #ADDRESS. Wherever you want the contact's company name, type #COMPANYNAME. Wherever you want the program to insert the date, type #DATE. See illustration to the left to see how this will look.

You can click the **Export Template** button to save the template for future use. To import a previously saved template, click the **Import Template** button. Click the **Restore Template** button to revert the template back to its original state. When you're done editing the template, click **Close Template**.

In the Mailing List Control window you will find a **Print All** button. Click this button to automatically generate printed letters to each contact.

Or, use the **Next, Last, Prev** or **First** buttons in the Mailing List Control window to generate a letter for each contact. Then, click the **Print** button in the Send Form Letters window to print each letter individually. You can also click the **Copy to E-mail** button in the Send Form Letters window to send individual letters via e-mail.



The **Mark All** button in the Mailing List Control window will add the mailing date to either one of the **Miscellaneous** fields or the **Notes** field so you have a record of when you last sent the contact a letter. If you choose **Notes**, you can also add a note about the type of mailing.

The **Cancel** button in the Mailing List Control window will take you back to the Contact Chooser window.

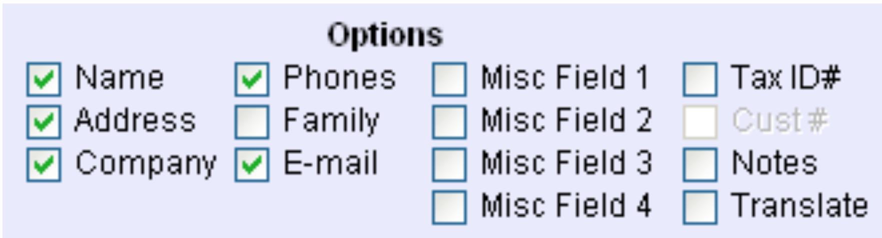
You can also print envelopes from the Send Form Letters window by clicking the **Prepare Envelope** button. A **Return Address** field will appear along with **Print Envelope, Print All Envelopes** and **Restore Letter** buttons.

Adding Records to Contact Tracker

1. Click the **New** button
2. Enter the **First Name**, **Last Name**, and/or **Company Name**
3. Enter the **Mailing Address**
4. Click the **Shipping tab** and enter the **Shipping Address**
5. Enter an **E-Mail address**
6. Add any number of **Phones/Fax/Pagers**
7. Choose a Contact **Type**
8. Enter any **Notes,** and **Family** or **Associates**
9. Use the four **Miscellaneous** fields for any purpose.

Contact Tracker’s Report - List Contacts

Easily create lists of contacts by clicking the **List Contacts** button in the Contact Tracker window.



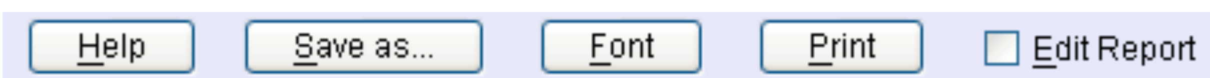
You can include any of the fields in Contact Tracker by enabling any of the **Options** at the top of the Contact List window. Choosing these options causes that type of information to be added to the report.

The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **First Name, Last Name, Company, Type, Misc 1, Misc 2, Misc 3, and Misc 4.**

Click any contact's name in the list to go directly to its record.

Easily generate a list of e-mails by choosing ONLY the **E-mail** option (or just the **Name** and **E-mail** options). You can sort this list by **Name** or by either **miscellaneous** field.

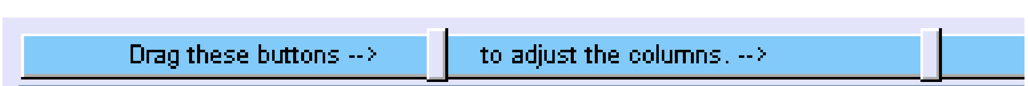
Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.



The font face, size, and line height of the list can be modified by clicking the **Font** button. You can print the Contact list by clicking the **Print** button. To save the list as a text file for importing into another program click the **Save as...** button.

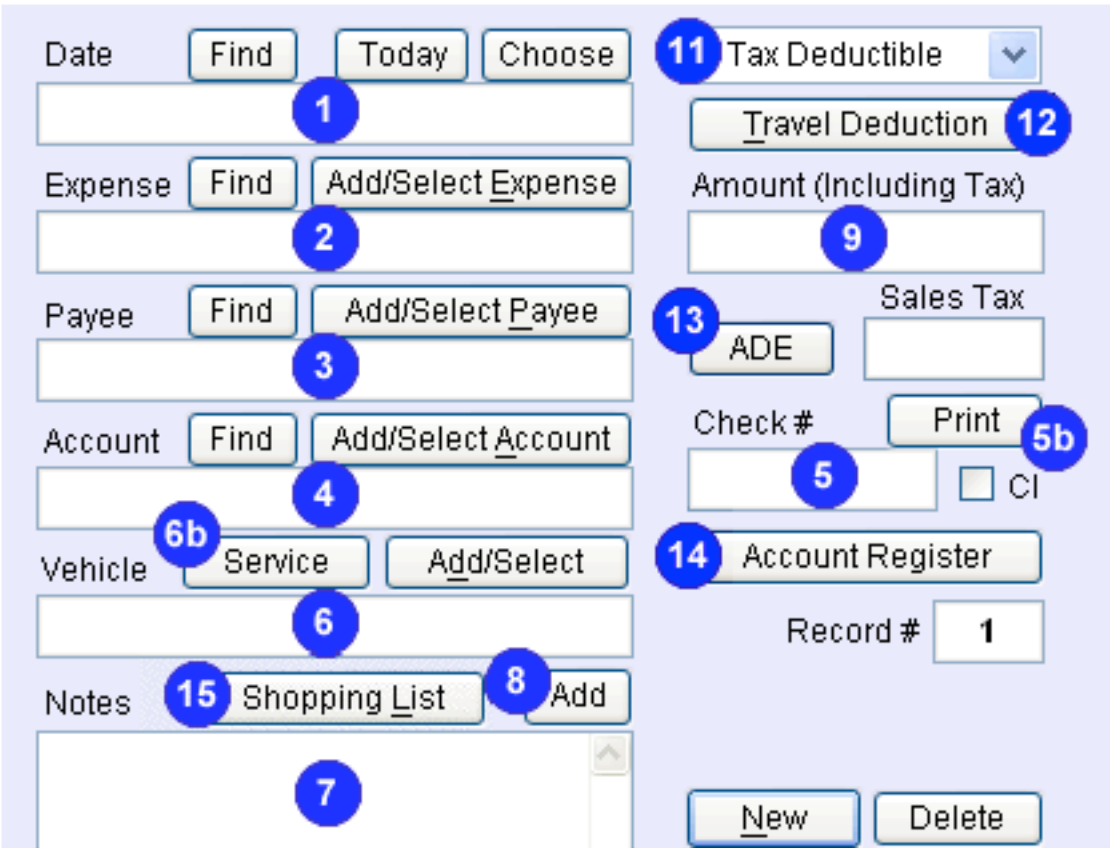
Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

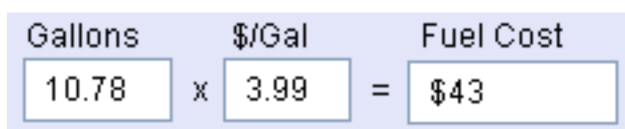


Expense Tracker

In Expense Tracker, the **Date (1)** is automatically entered when the record is created. You can locate a record for a particular date by clicking **Find** above this field.



Choose the **Expense** type **(2)** from a list provided or create your own. If **Auto and Travel** is selected fields to record the **Gallons** (or Liters), amount per unit and the total **Fuel Cost** will appear.



Create your own lists of **Payees (3)** by clicking the **Add/Select Payee** button above the field. Your list of payees will include all the people or businesses you pay money to.

Create your own lists of **Accounts (4)** by clicking the **Add/Select Account** button. These can include Checking and Savings, Credit Cards or Lines and Cash accounts. Record the check number (if applicable) in the **Check#** field **(5)**. Click the **Print** button above this field **(5b)** to Print your check.

Click the **Find** button above the field **(2, 3 or 4)** to see a list of similar records. You can **Go To** the record or **Duplicate a Recurring Expense Record.**

Assign a **Vehicle (6)** to the expense record. This is optional and you can keep track of any number of vehicles. Click the **Service** button **(6b)** to open a window where you keep track of when and where the **Last Oil Change, Last Tune Up, Brake Service, Automatic Transmission Service and Tire Rotation** was performed. You can also keep notes about your vehicle in this window.

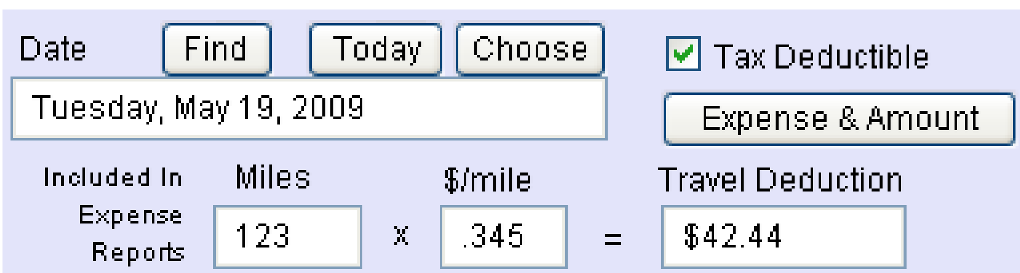
Keep notes of any length about the expense in the **Notes** field **(7)**.

All numbers in the **Notes** field **(7)** can easily be added to the **Expense Amount (9)** by clicking the **Add to Expense Amount** button **(8)**.

The total amount paid is entered into the **Amount (including tax)** field **(9)**. You can keep track of the **Tax Type** and the amount of **Tax Paid** in the fields provided **(10).**

Use the **Tax Deductible** option menu **(11)** to indicate whether the expense should be Tax Deductible, Not Deductible or if it should be added to the **Depreciate** list in the **Tax Form Report.**

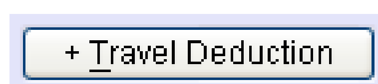
Keep track of tax deductible mileage with the handy calculator which is revealed by clicking the **Travel Deduction** button **(12)**. Here are the **Travel Deduction** fields:



Just enter the number of **Miles** traveled and the reimbursement amount per mile (**$/mile**) and the **Travel Deduction** amount will be calculated.

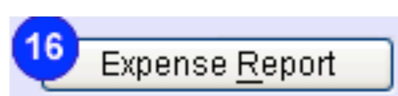
Click the **Expense & Amount** button to hide the **Travel Amount** fields.

When there is a **Travel Deduction** amount the **Travel Deduction** button has a **+** in it and looks like this.



View a balance sheet for the current Account by clicking the **Account Register** button (**14).** On this screen you will find an **Add/Select Account** button, **Start Date** and an **End Date** fields, and an **Add Deposits & Payments** button.

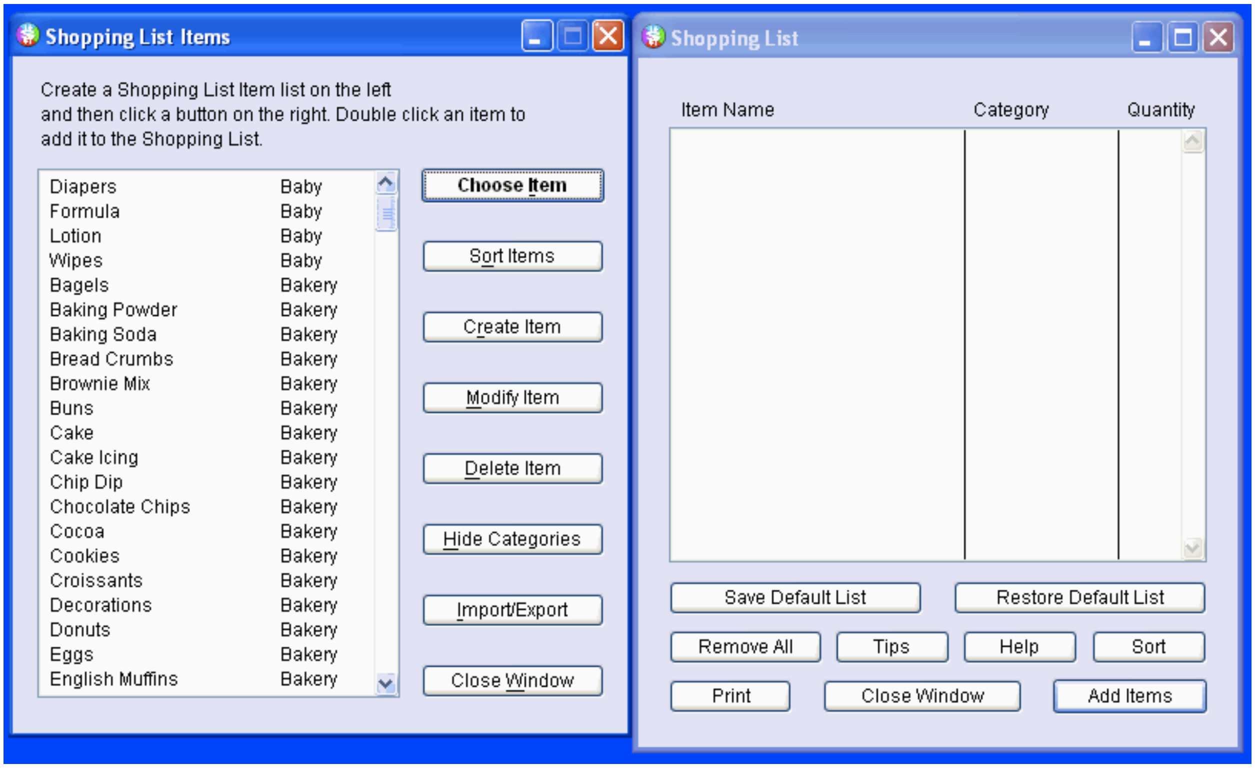
Creating **Expense Reports (16)** or printable information for tax forms is quick and easy from the Report Options window.



Shopping Lists

Use the Shopping List generator to create a list you can print and take with you to the store.

Clicking the **Shopping List** button **(15)** above the Notes field in Expense Tracker opens the Shopping List window. At the bottom of this window there are buttons that allow you to **Add Items** to the list, **Remove All** the items in the list, **Print** the list, **Sort** the list and **Close** the window.



Click the **Add Items** button to choose **Shopping List Items** from a long list. You can **Save a Default List** for future use, make changes to the list, print it and then **Restore the Default List.**

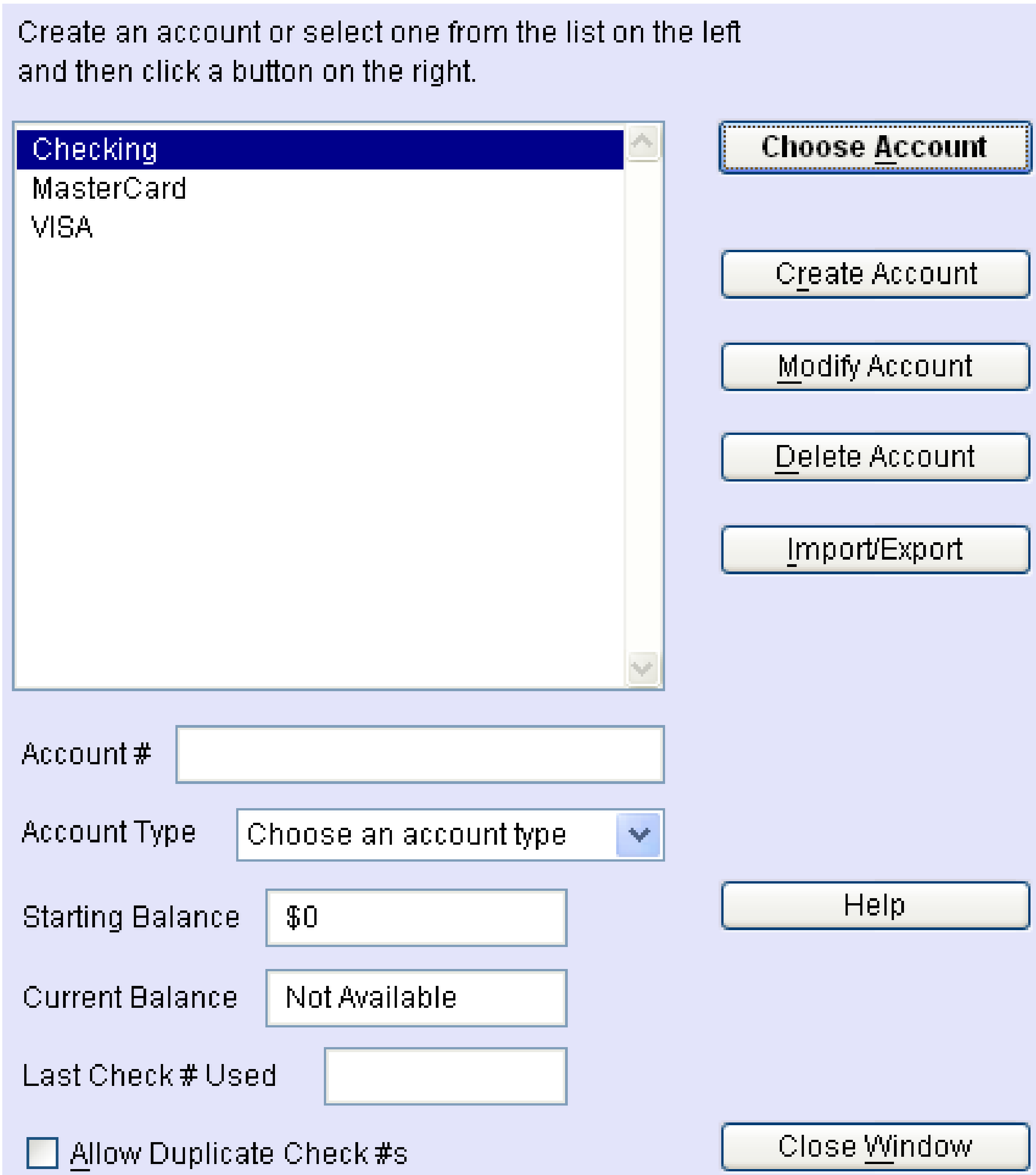
In the **Shopping List Items** window you can **Sort** Items by **Name** or **Category**, **Create** new items, **Modify** existing items, **Delete** items and **Edit the list of Categories** to choose from. You can also **Import** or **Export** these lists.

The **Shopping List** can be also sorted by **Item Name** or **Category**.

If you click a line in the **Shopping List** you will be asked if you want to change the **Name** (you may want to add the size or brand to the name) or **Quantity**, or **Remove** the item from the list.

About Accounts

Create your own lists of **Accounts** by clicking the **Add/Select Account** button. These can include Checking and Savings, Credit Cards or Lines and Cash accounts.



You can add, delete or modify this list of accounts to suit your needs. Just click **Add/ Select Account**, then click **Create Account** or click an account and then click **Modify Account** or **Delete Account**.

When you click **Create Account** you will be asked to enter a name and then an **Account #**. Next enter the **Starting Balance** and the **Last Check # Used**. The Starting Balance is used in the Account Register window.

Next select an **Account Type**. Click the **Help** button in this window for more information about the different Account Types.

The **Last Check # Used** field is incremented whenever you create an Expense Tracker record with a **Check #** for that account.

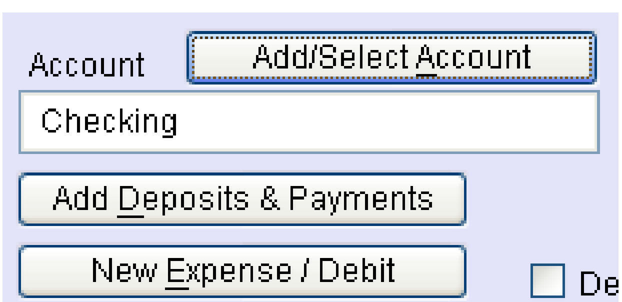
If you want to have several records for one check #, then enable the **Allow Duplicate Check #s** option.

When you click an Account in the list, the **Starting Balance**, the **Current Balance** and the **Last Check # Used** are displayed in the fields at the bottom of the window. You can modify the **Starting Balance** or the **Last Check # Used** by clicking the field. The **Current Balance** is calculated in the Account Register window and is not editable.

You can go to the first or last record for a particular Account by clicking the **Find** button above the **Account** field in the Expense Tracker record.

To transfer funds from one **Account** to another, click the **Add/Select Payee** button in the Expense Tracker record and choose **Transfer to Another Account**. You will then be prompted to enter the **Account** to transfer the funds from. Next you will enter the date of the deposit (or transfer) and the amount.

Account Register



The **Account Register** button takes you to the Account Register window where all the checks you've entered into Expense Tracker and Payments or Deposits in Income Tracker for that **Account** are listed.

At the top of the window you can **Add/ Select** another **Account**, **Add Deposits & Payments**, add a **New Expense / Debit**. You can also choose a **Start Date**, an **End Date** or **All Dates** and choose whether to display **Descriptions** or not. You can also add **Daily Separators,** or **Translate** the register.

When you click the **Add Deposits & Payments** button a new Income Tracker record will be created.

The report lists checks that have cleared (the **Cl** checkbox has been clicked on the Expense Tracker record) as [C] and not cleared as [ ]. You can use this feature to reconcile your check book or account statement.

The **New Expense / Debit** button returns you to Expense Tracker and creates a new record.

You can **Print** the register or save it to a text file by clicking the **Save as...** button.

To Add Records to the Expense Tracker

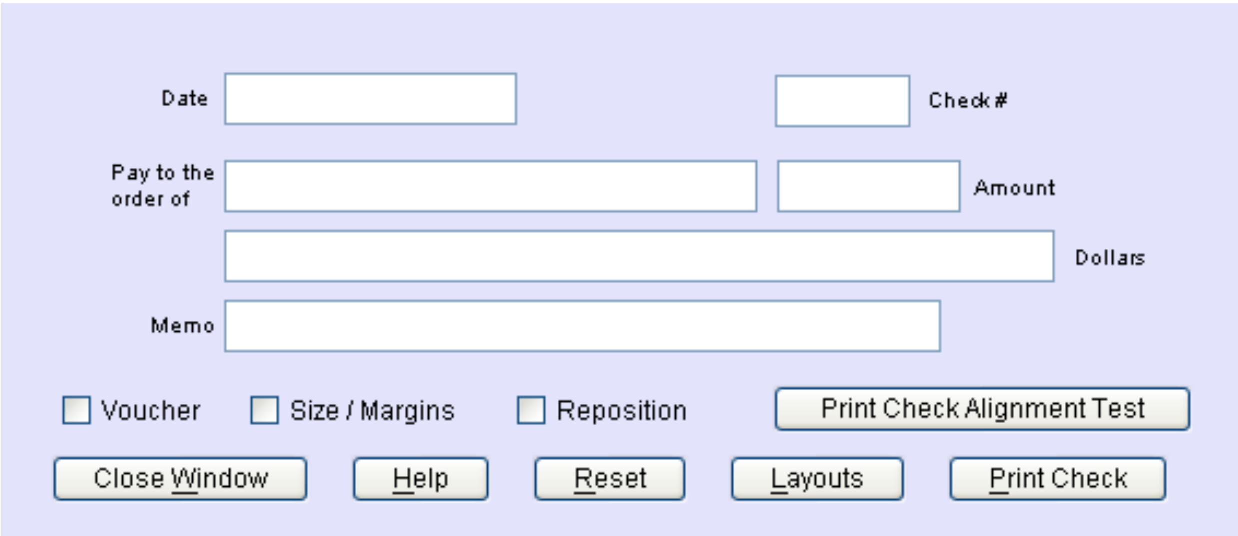
1. Click the **New** button. You will be presented with five choices, **New, Payee/Expense, Account, Combine** or **Duplicate**. If you choose **New**, a blank record will be created. If you choose **Payee/Expense**, the expense and payee will be copied onto the new record. If you choose **Account**, the account will be copied onto the new record. If you choose **Duplicate**, all information except for the **Check #** will be copied onto the new record. If you choose **New or Account** you will be prompted to choose an **Expense**.

If you choose **Combine** you will have a choice of **Creating** a **New Record** for all the expense records for the current **Payee** on the current **Date** or to **Just Print** a **Check** for the combined amount. Any check numbers will be replaced with a new check number. If you choose **Create New Record** the amounts on existing records will be changed to Combined, the records will no longer appear in reports, and a list of Amounts will be added to the **Notes** field on the new record. If you choose **Just Print Check** the list of Amounts and the total Travel Deductions will appear in the **Voucher** field.

2. Change the payment **Date** to the correct date if necessary.
3. Add or Select a **Payee** if one was not duplicated.
4. Add or Select an **Account** from your list.
5. Enter an **Amount**, any **Tax Paid**, and the **Check #** if applicable.
6. Add any **Notes** about the Expense.
7. Choose a **Vehicle** for the Expense if appropriate.
8. If you had to drive somewhere in connection with this expense, click the **Travel Deduction** button and enter the number of miles traveled.

If you want the record automatically duplicated each month because it is a recurring expense then click the **ADE (Auto Duplicate Expenses)** button (13) and then enable the **Automatically Duplicate This Expense Each Month** option. Then when you click the **Add New Expense Now** button, all records with this option enabled will be duplicated for the current month.

Recording and Printing Checks



The **Print** button above the **Check #** field in Expense Tracker takes you to the Check Printing window where you can print a check. Most of the fields are automatically filled in but you can edit them before printing.

At the bottom of the window are several buttons you can use to modify the position of the fields in the printout.

Start by clicking the **Print Check Alignment Test** button which will print a test check on a plain piece of paper. Hold the printout up against a blank check and look at a light through the papers to see how close the alignment is.

If the printout is way off, click the **Size/Margins** button. This will show fields where you can specify the margins for printing. Bigger numbers in the **Top** and **Left** fields provide more space from the top and left edges of the paper. You can also change the size of the text that is printed. Click the **Size/ Margins** button again to hide these fields. If the top or left margins need to be made even smaller, click **Reposition** to move the fields closer to the top or left edge of the window.

Click the **Reposition** button to allow the movement of any of the fields for better alignment. Several test printings may be necessary before you have everything aligned properly. Click the **Reposition** button again when you are done.

Some experimentation may be necessary to get the fields to line up correctly with the spaces on your checks. The labels, field borders and check number field will not print on your check. They are only for alignment purposes.

The **Reset** button will reset the positions of all fields back to the default setting in case you want to start again.

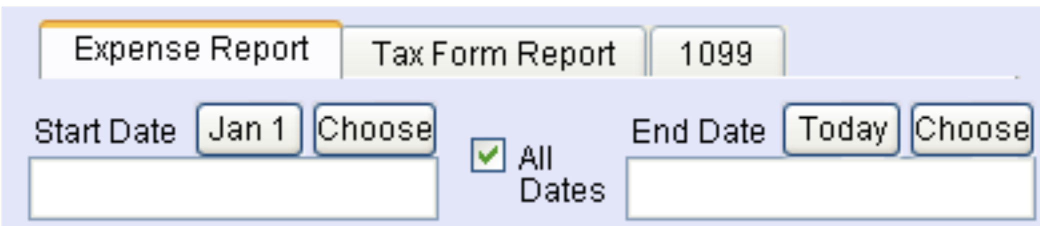
The **Layouts** button opens a small window where you can save any number of layouts for future use. After getting all the fields to align properly with your checks, you should create a layout. This will make restoring the layout easy when you update.

The **Voucher** option will cause a voucher section to be printed below the check with details from the Expense Tracker record.

When everything looks correct, click the **Print Check** button and print out your check.

Expense Tracker's Reports

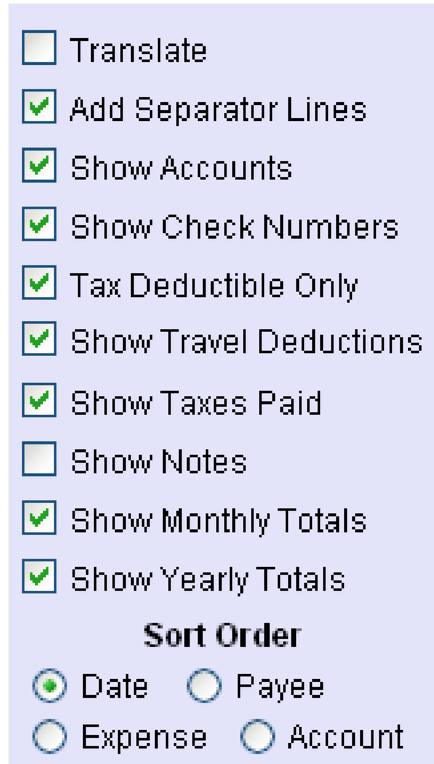
Easily create lists of expenses by clicking the **Expense Report** button in the Expense Tracker window.



You will be presented with an Expense Report Options window. There are two tab buttons at the top of this window. The **Expense Report** tab displays normal expense report options. The **Tax Form Report** tab displays options for generating a report you can use to fill out your tax forms. You can print 1099-MISC forms in the **1099** section.

Expense Report Options

There are several **Expense Report** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.



Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the <u>Translations screen in Preferences</u>.

Add Separator Lines for better readability. **Show Accounts** and **Show Check Numbers** if desired.

You can also **Show Travel Deductions** and **Taxes Paid**. Add your notes to the report by checking **Show Notes**.

If the **Sort Order is Date**, you can add totals to the report by clicking **Show Monthly Totals** or **Show Yearly Totals**.

You can report on all expenses by clicking the **All** button next to the expenses field or choose one or more specific expenses to include in the report by clicking **Select Expense(s)**.

You can report on all **Payees** by clicking the **All** button next to the payees field or choose one or more specific payees to include in the report by clicking **Select Payee(s)**.

You can report on all **Accounts** by clicking the **All** button next to the accounts field or choose one or more specific accounts to include in the report by clicking **Select Account(s)**.

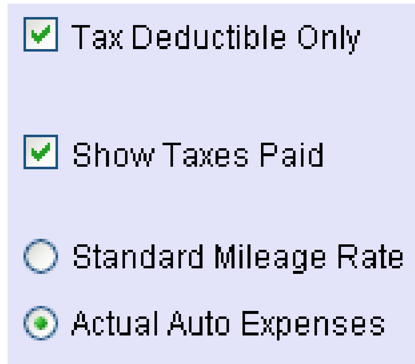
You can sort the **Expense Report** by choosing an option from the **Sort Order** group. The choices are **Date, Payee, Expense** or **Account.**

To generate your report click the **Create Report** button.

Tax Form Report Options

There are several **Tax Form Report** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.

If you use the **Standard Mileage Rate** option in your **Tax Form Report**, all the mileage amounts will be totaled on the report. If you choose the **Actual Auto Expenses** option, only records with the **Expense** type **Auto and Travel** will be totaled on the report.



Choose the **Tax Deductible Only** option to include only records marked as **Tax Deductible** in your report.

Click the **Show Taxes Paid** option to include the **Tax Paid** information.

1099 Generator

There are several **1099 Generator** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.

Click **Select Payee** to choose the person you want to create the 1099-MISC form. If you have filled out the **Description** section for the person, most of the information in the **Recipient Information** field will be filled in. If not, you will need to fill in this information before continuing. Click the **Show Payers Information** button to fill in the **Payer Information** field. You must also do this before generating the 1099.

You can report on all accounts by clicking the **All** button next to the **Accounts** field or choose one or more specific accounts to include in the report by clicking **Select Account(s)**.

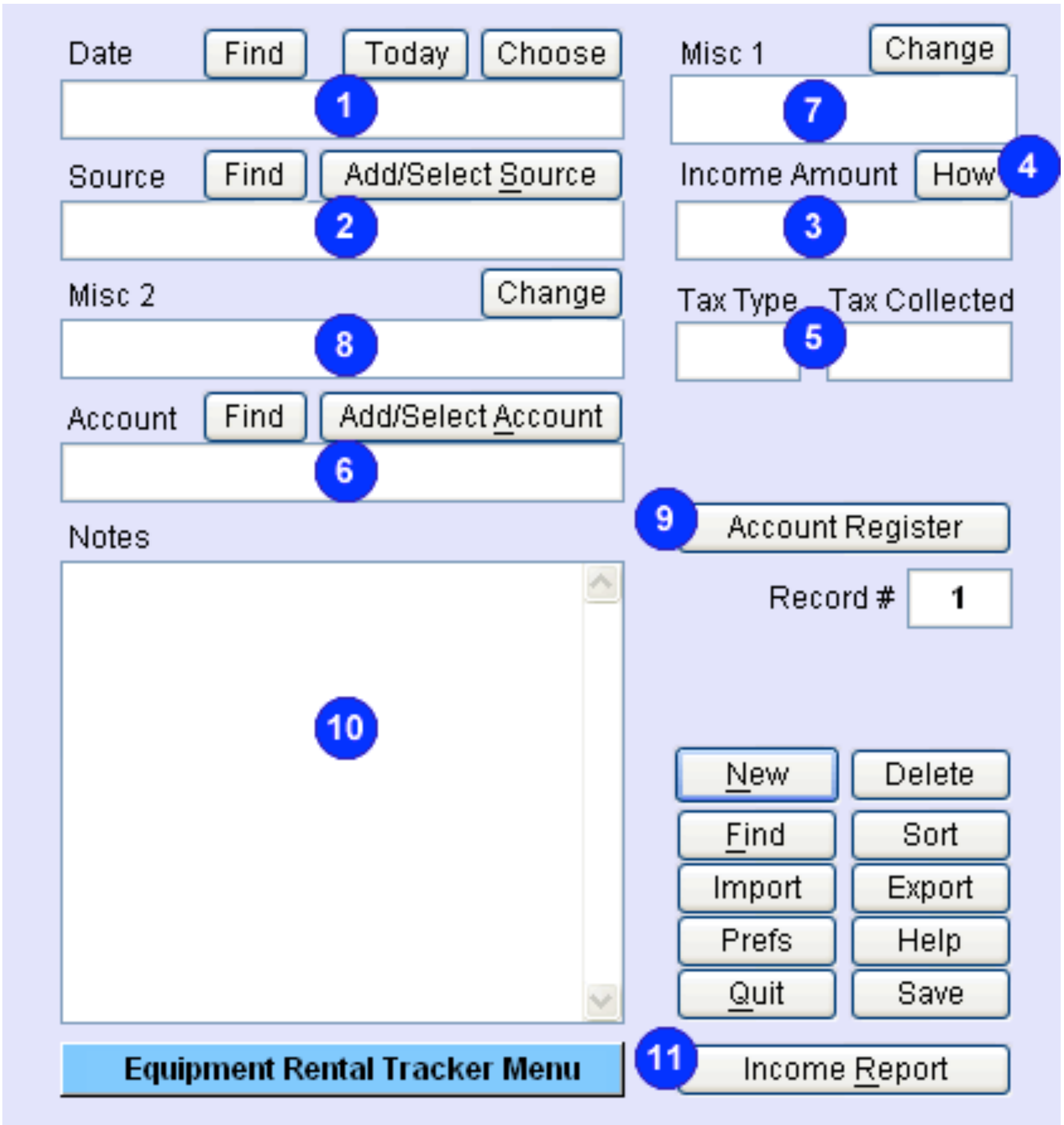
Choose the **Tax Deductible Only** option to include only records marked as **Tax Deductible** in your report.

Click **Preliminary Report** to generate a report for the Payee or Recipient. By doing this you can confirm that all the correct records are included in the total that will be displayed on the 1099-MISC form.

Click the **Generate 1099** button to view the Form 1099-MISC Printer window. Click **Help** in this window for information about printing the 1099 form.

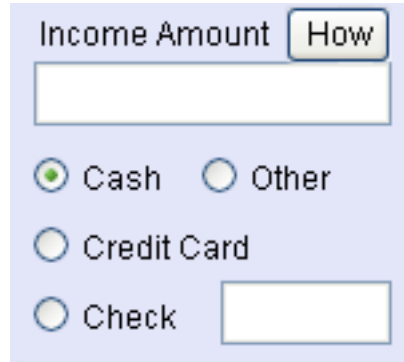
Income Tracker

In Income Tracker, the **Date (1)** is entered when the record is created. You can locate a record for a particular date by clicking the **Find** button above this field.



Choose the income **Source** type **(2)** from a list provided or create your own. The **Source** could be a person, an activity, etc. Then enter the **Income Amount (3)**.

Clicking the **How** button above the **Income Amount** field **(4)** will reveal fields (shown to the right) where you can record the payment type by clicking the **Cash, Credit Card, Check** or **Other** button and entering a check # or other payment type.



Enter any tax collected in connection with the **Income Amount** in the **Tax Type** and **Tax Collected** fields **(5)**.

Create your own lists of **Accounts (6)**. Your list might include business checking or credit lines or cash accounts.

There are two misc fields which you can use for any purpose **(7 and 8)**. Click the **Change** button above either of these fields to change the labels. You can sort the records or reports by these two fields.

View a balance sheet for the current **Account** by clicking **Account Register (9).**

Keep notes of any length about the income in the **Notes** field **(10)**.

Creating **Income Reports (11)** is as easy as clicking this button.

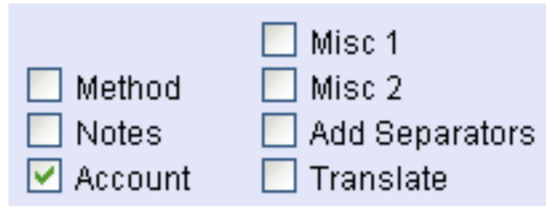
To Add Records to Income Tracker

1. Click the **New** button. You will be asked if you want a **New** blank record, a record with the same **Source/Account** as the current record, or a **Duplicate** of the current record. If you choose **Duplicate or Source/Account**, you will be asked for an **Income Amount**. If you choose **New** you will be asked to select a **Source** type from the list, then the **Account** and finally the **Income Amount**.
2. Change the payment **Date** to the correct date if necessary.
3. Add or Select a **Source** if one was not duplicated.
4. Select an **Account** from your list.
5. Enter an **Income Amount** and any **Tax Collected** if applicable.
6. Add any **Notes** about the income.
7. Enter any information into the **Misc 1** or **Misc 2** fields.

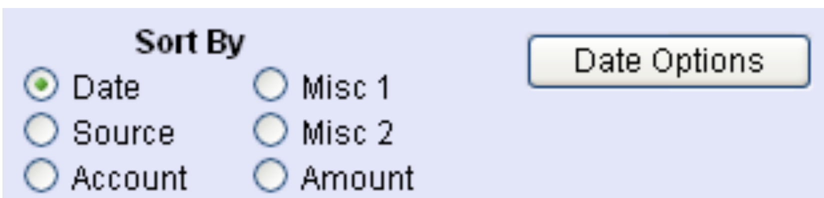
Income Tracker's Report Options

Easily create a report of all your Income Tracker records by clicking the **Income Report** button in the Income Tracker window.

There are several options to choose from at the top of the Income Report window. Choosing these options causes that type of information to be added to the report. These include: **Method, Notes, Account, Misc 1, Misc 2,** and **Add Separators.**

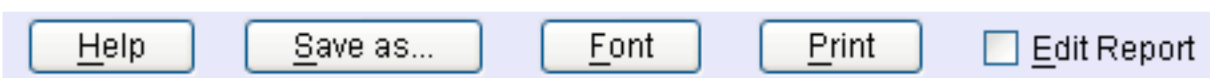


The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Date, Source, Account, Misc 1, Misc 2,** and **Amount.**



You can choose a particular date range by clicking the **Date Options** button.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.



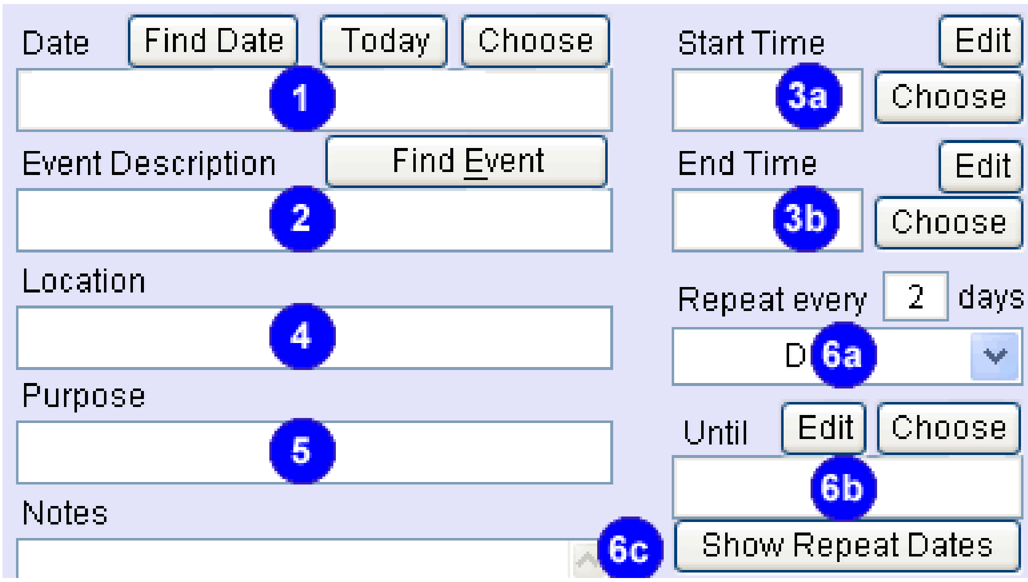
Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

The font face, size, and line height of the text of the report can be modified by clicking the **Font** button. You can print the report by clicking the **Print** button. To save the list as a text file for importing into another program click the **Save as...** button.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

Schedule Tracker

Each record in Schedule Tracker consists of the **Date of the Event (1) , Event Description (2), Start and Stop Times (3a & 3b), Location (4)**, and **Purpose (5).**



Use the **Click to Repeat** feature to keep track of any repeated events occurring at the same time each day, week, month or year. You can choose to have the event repeat **Daily, Weekly**, on **Week Days, Every Month, Yearly** or on a particular **Day of the Month** by using the **Click to Repeat** button **(6a).**

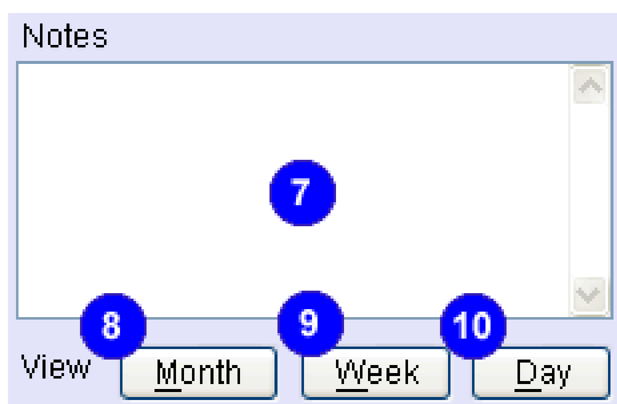
If the **Daily** or **Weekly** options are chosen, another field appears which will allow you to specify if you would like the event to repeat every (number of) days or weeks.

The **Until (6b)** date field allow you to specify how long to repeat the event. View and edit the list of repeating dates by clicking the **Show Repeat Dates (6c)** button that appears after selecting a repeat option.

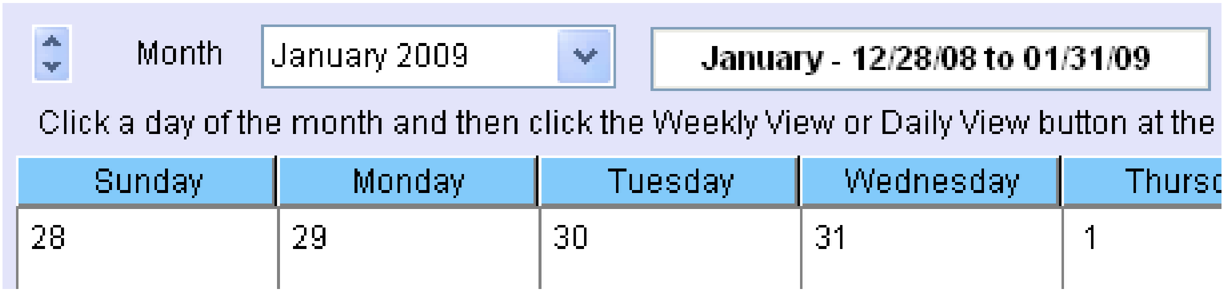
The **Start Time (3a)** and **End Time (3b)** fields are optional. If left blank the event will be listed first in the schedule for that day.

Keep notes of any length in the **Notes** field **(7)**.

You can view your schedule for the **Month (8)**, **Week (9)**, or **Day (10)**, in a graphical format, by clicking one of these buttons.

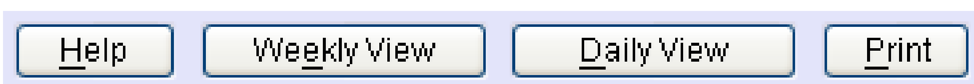


Monthly View



Click the **Monthly** button to see a monthly view of your schedule. The month that includes the **Date** on the current record is displayed by default. To display another month, use the **Prev Month** or **Next Month** buttons to the right of the calendar or choose a **Month** from the menu in the top left corner of the window.

You can also specify a **Start Date** for the Monthly View by clicking the small arrows in the top left corner and then clicking the **Choose** button. If you do not choose a Sunday, the nearest Sunday to the date you choose will be entered into the **Start Date** field. Clicking the small arrows button in the top left corner toggles back to the **Month** menu.

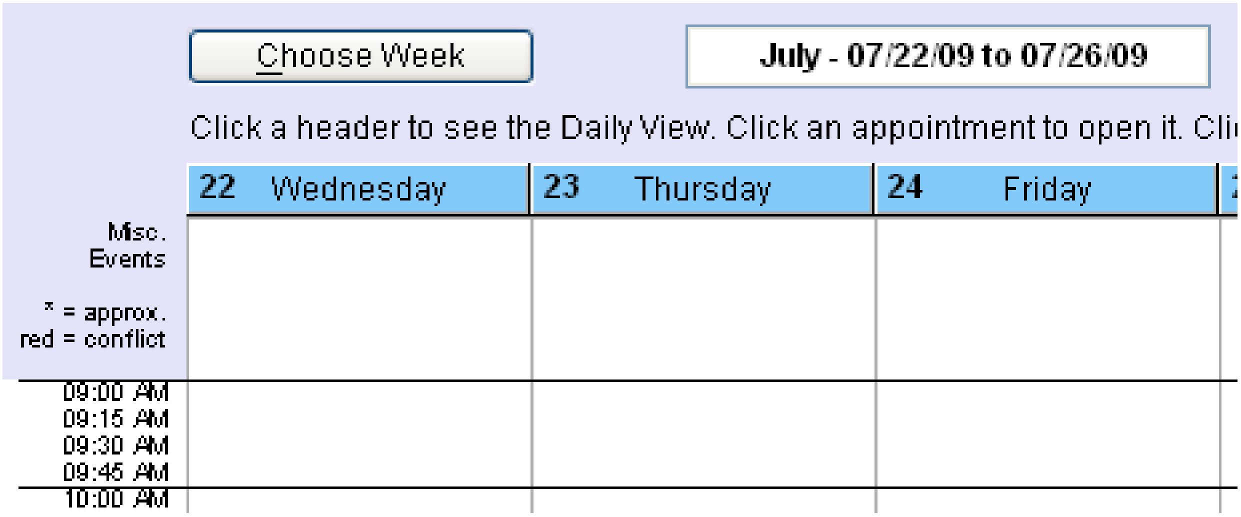


To see a **Weekly View** or a **Daily View**, click a day in the calendar and click one of the buttons at the bottom of the window. You can see all the appointments for any day from these windows.

You can **Print** the Monthly View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the colors of the window.

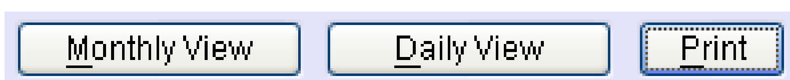
If you make changes in Schedule Tracker with the Monthly View window open, you will need to click the **Refresh** button to update the window.

Weekly View



Click the **Weekly** button to see a weekly view of your schedule. The week that includes the **Date** on the current record is displayed by default. To display another week, use the **Prev Week** or **Next Week** buttons. You can also shift the dates by using the **Previous Two Days** or **Next Two Days** buttons below the calendar, or use the **Choose Week** button in the top left corner of the window.

To see a **Daily View**, click the header button for the day you want to see. Or click the **Daily View** button at the bottom of the window to go to the first day of the week.

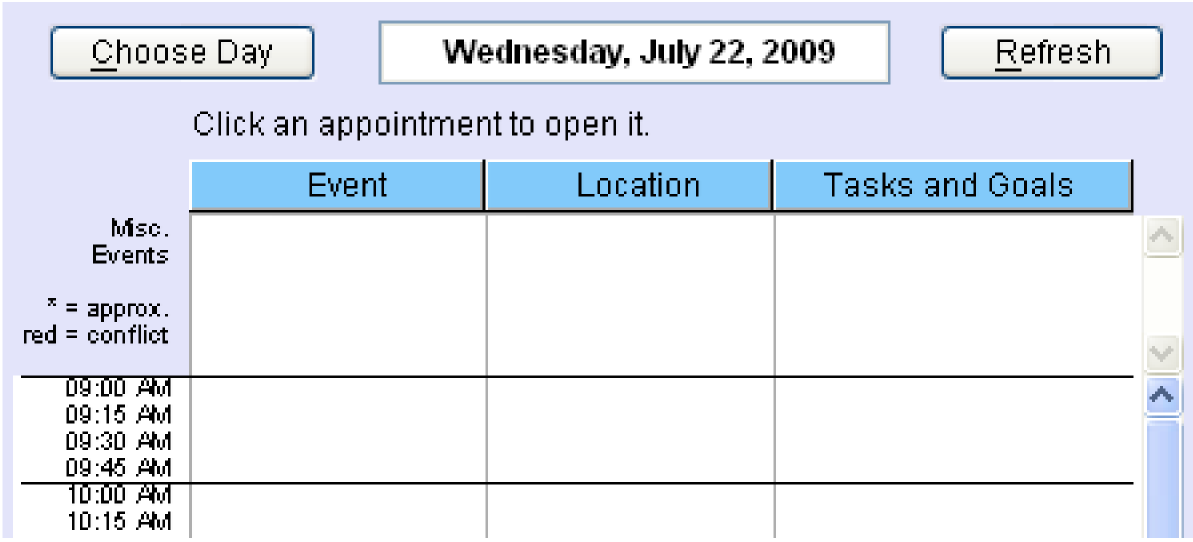


Click **Table Options** to specify the **Text Size** and start and stop times for the **Weekly View**. These times must be in whole numbers (ie 8:30 is not allowed). The start time can be either before or after noon, but the end time must be after noon. You can choose 5, 10 or 15 minute **Time Increments**. Events starting with an asterisk (*) have been rounded to the previous time slot (for example if Time Increments has been set for 15 minutes, then an event scheduled for 11:50AM will be posted at 11:45AM).

You can **Print** the Weekly View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the colors of the window.

If you make changes in Schedule Tracker with the Weekly View window open, you will need to click the **Refresh** button to update the window.

Daily View



Click the **Daily** button to see a daily view of your schedule. The **Date** on the current record is displayed by default. To display another day, use the **Previous Day** or **Next Day** buttons below the calendar, or use the **Choose Day** button in the top left corner of the window.

Events listed in Red have conflicting events (two things are happening at once).

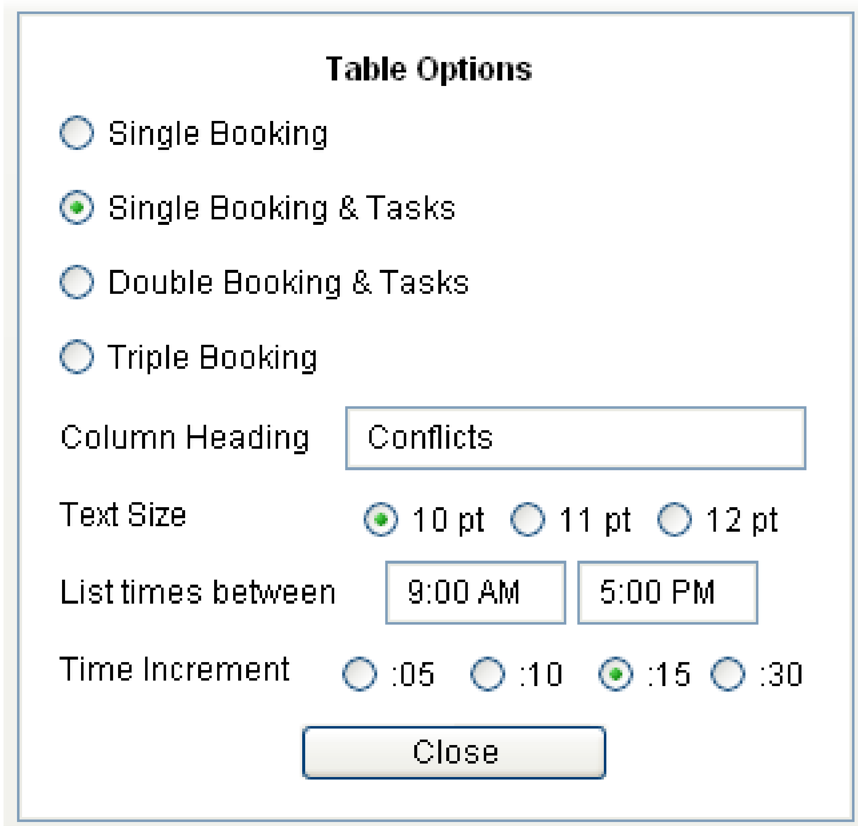
Click the **Table Options** button to change the three columns in the Daily View. The choices are:

Single Booking (conflicting appointments will be shown in red and the Location and Purpose of the appointment will be displayed),

Single Booking & Tasks (the Purpose column is replaced by your current Task List from Task or Goal Tracker),

Double Booking & Tasks (conflicting appointments are shown in the second column instead of the Location) and

Triple Booking (appointments that conflict with the first column are shown in the second and appointments conflicting with those in the second column are shown in the third).

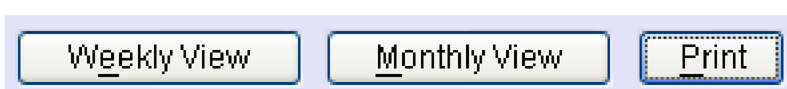


You can enter a new term for the second (and third) **Column Heading** in Double and Triple Booking modes if you prefer some other term besides "Conflict".

You can also specify the **Text Size** and the start and stop times for the Daily View in the **List times between** fields. These times must be in whole hour increments (ie 8:30 is not allowed). The start time can be either before or after noon, but the end time must be after noon.

You can choose 5, 10, 15 or 30 minute **Time Increment**s. Events starting with an asterisk (*) have been rounded to the previous time slot (for example if **Time Increment** has been set for 15 minutes, then an event scheduled for 11:50AM will be posted at 11:45AM).

You can **Print** the Daily View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the options or the colors of the window.



If you make changes in Schedule Tracker with the Daily View window open, you will need to click the **Refresh** button to update the window.

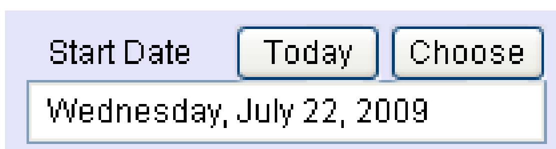
Adding Records to Schedule Tracker

1. Click the **New** button
2. Enter the **Date** by clicking **Today** or **Choose**
3. Enter the **Event Description**
4. Enter the **Location** and **Purpose**
5. Enter the **Start Time** and **Stop Time** if applicable
6. Choose an option from the **Click to repeat** menu if this is a repeating event
7. Enter any **Notes**

Schedule Tracker's Report - View Schedule

You can generate **Daily, Weekly** and **Monthly** schedules for viewing, printing or saving as text.

You can choose from several **List Options**. Click the **Day, Week, Month** or **Other** radio button to switch between views. If you choose **Other** you will be prompted for an ending date.



The **Start Date** field is automatically filled in. To change the date click the **Choose** button or click the **Today** button.

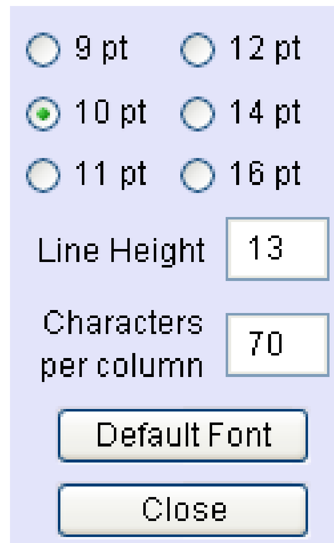
The **Show All Times** option will display all the hours for each day in addition to events for that day. This option is only available for **Days** or **Weeks**. You can change the range of hours displayed from the Preferences window. **Show Purpose** displays all Purpose notes. **Show Notes** displays all Event notes.

You can go directly to any event record by clicking any line with an event description in the schedule.

Report Output Modification

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.

You can Print any schedule by clicking the **Print** button, or save it to a text file by clicking the **Save as...** button. You can then open this text file in your word processor or another program. You may also want to save schedules for archiving purposes.



Before printing you may want to adjust the font, size or line height of the report or invoice text by clicking the **Font...** button. Choose a new font by clicking its name in the font list. Change the font size by clicking one of the pt size radio buttons. Not all fonts are available in all sizes, so you may not notice a change. Click the line height field to enter a new number. The minimum line height is equal to the text size plus one (i.e., if the text size = 14 then the minimum line height = 15).

You may also want to adjust the **Characters per column** setting. If the **Show Purpose** option is enabled, each of the three right columns are limited to the number of characters specified here. If the **Show Purpose** option is NOT enabled, the **Event Description** column width is equal to twice the number of characters specified here. After adjusting the font, size or line height, you may need to also adjust the **Characters per column**.

Close the Font dialog by clicking on **Close** button.

Close the View Schedules window by clicking on **Close Window** button when you are finished.

The **Help** button brings you to the Help window.

The **Save** button saves your schedule. All data is saved automatically when going to another record or window.

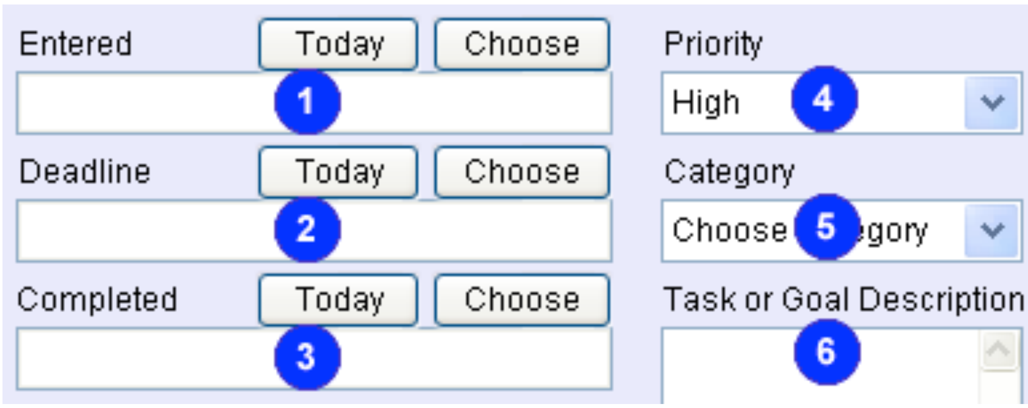
Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

Task or Goal Tracker

Each record in Task or Goal Tracker consists of:

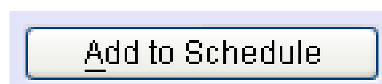
The date the task was **Entered (1),** the **Deadline (2),** the Date **Completed (3),** the Task **Priority (4),** a **Category (5)**, the **Task or Goal Description (5),** and Task **Notes**



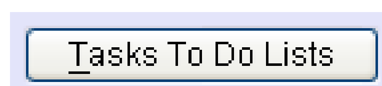
When you click the **New** button to add a record to Task or Goal Tracker the **Entered** date will automatically be filled in. You can change this date if you wish by using the **Today** or **Choose** buttons above the field.

You can select a **Priority** from the pull down menu. The choices are **Urgent, High, Medium** and **Low.** You can also select a **Category** from a list you create. Just select Add Category and enter a short description of a To Do list you want to create.

Next enter a **Task or Goal Description**. You may also enter any **Notes** before, during or after the task is completed. If the task has a deadline, enter that date into the **Deadline** field. When the task is completed, fill in the **Completed** field.



You can easily add a task to Schedule Tracker by clicking **Add to Schedule.**



View a list of tasks by clicking **Tasks To Do Lists**.

To Add Records to Task or Goal Tracker

1. Click the **New** button
2. Enter the **Deadline** and choose a **Priority**
3. Enter the **Task Description** and any **Notes**

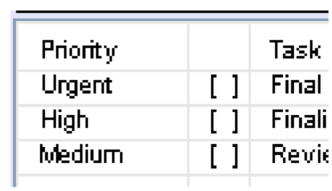
Task or Goal Tracker's Report - Tasks To Do Lists

Easily create lists of tasks by clicking the **Tasks To Do Lists** button in the Task or Goal Tracker window.

You can list **All Tasks, Uncompleted, Completed** or just **Urgent Tasks** by clicking the appropriate radio button at the top of the Tasks To Do Lists window.

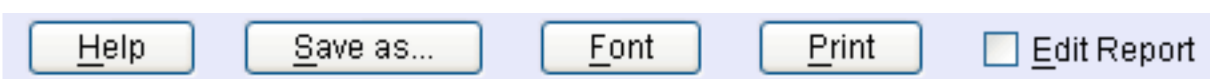
The list can show just the task description and priority, or you can choose to show **Deadlines, Categories** and **Dates Entered**. You can also choose **All** categories or just one by deselecting the **All** option. A list of categories will be presented to choose from.

The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Priority, Task, Category, Deadline,** and **Date Entered**.



Between the **Priority** and **Task** columns in the report is a row of checkboxes. [x] indicates the task is already completed and [ ] indicates that the task still needs to be done. After printing a report you can use these boxes to check off completed tasks.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied.



To save the list as a text file for importing into another program click **Save as...**

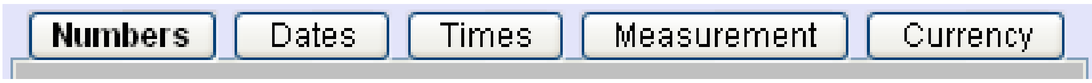
The font face, size, line height and tab stops of the list can be modified by clicking the **Font** button. You can print the task list by clicking the **Print** button.

To edit the report before printing, click the **Edit Report** button in the Tasks To Do Lists window. To make the report so you can click an item to go to its record, just click the **Edit Report** button again.

If the **Edit Report** button is not enabled you can click on any task to go to that record.

Universal Calculator

The Universal Calculator consists of five different calculators. Use the buttons along the top of the window to switch between them.



The **Numbers Calculator** is an easy to use program that operates similar to your average calculator.

This **Dates Calculator** allows you to easily add or subtract any number of days from any date.

The **Time Calculator** calculates the difference between times or adds a list of times, and the **Time Zones Calculator** calculates time differences between major cities.

The **Measurement Calculator** converts any length, volume or weight to the standard you need.

The **Currency Calculator** consists of the **Discounts & Sales Tax** calculator, the **Money Exchange** calculator and the **Payments** calculator.

On the bottom of each calculator window you will find the following buttons:

Quit button saves the data and quits the program.

To access the integrated help system, click on the **Help** button.

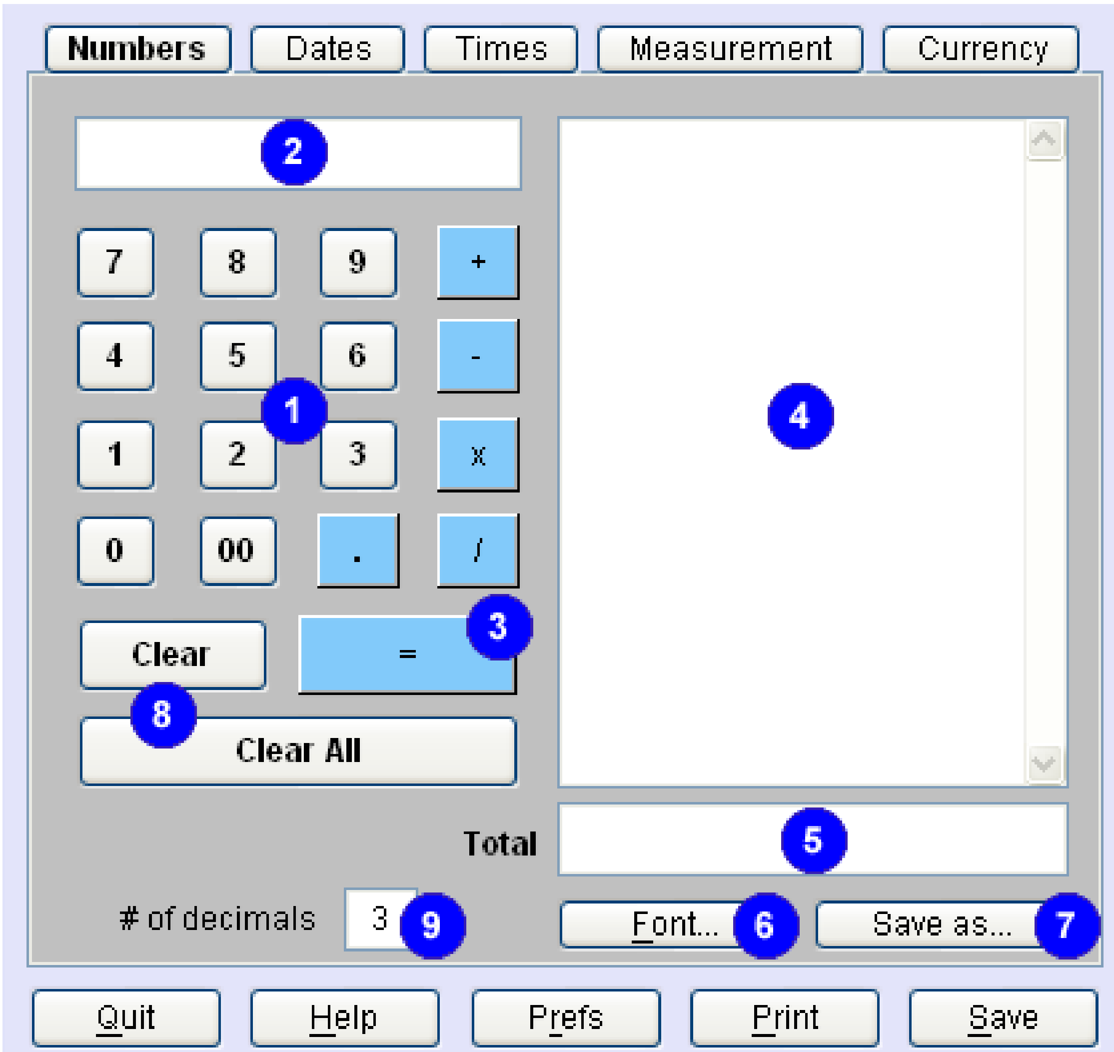
To access the Preferences window, click the **Prefs** button. You can change the highlight, button and background colors, time format, etc.

Click the **Print** button to print the current calculator window.

The **Save** button saves your data. All data is saved automatically when going to another calculator or when you quit the program.

Numbers Calculator

The **Numbers Calculator** is an easy to use program that operates similar to your average calculator.



You can enter **Numbers (1)** and Operators (+, -, * ,x, /, =) by clicking the buttons or by using the keyboard. For your convenience, both the x key and the * (shift 8) key perform multiplication. The number being entered appears in the top field **(2)**. To generate results simply use the return/enter keys or click the = button **(3)**.

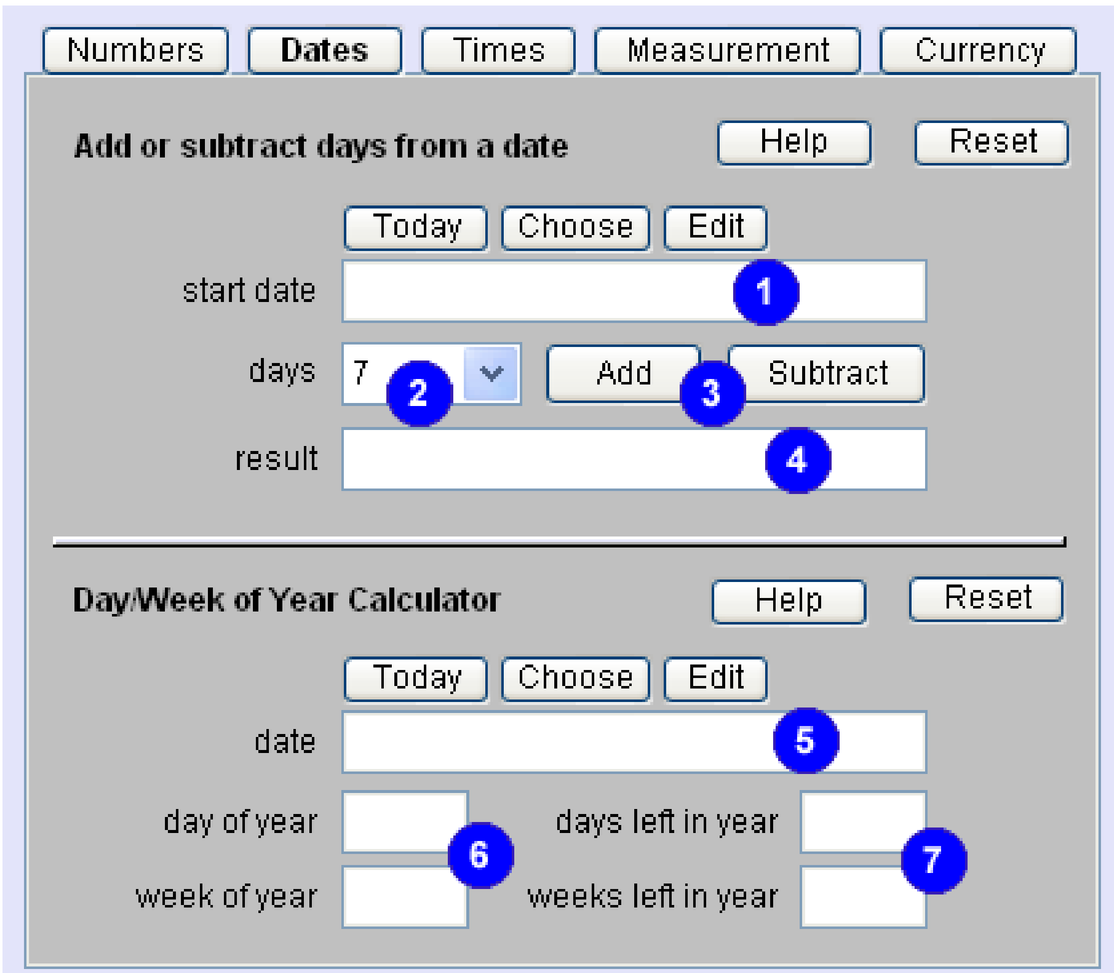
The Tape field **(4)** displays each line of your calculation just like an adding machine "tape". Click the **Save as...** button **(7)** to export the Tape field as a text file so that you can open it in another program. Click the **Print** button to print the Tape field.

If you make a mistake while entering a number, click the **Clear** button **(8)** to clear the calculator. Click the **Clear All** button to clear all fields.

You can copy the the **Total** field **(5)** by clicking the field and pressing ctrl + C (or Command + C on the Mac). You can then paste the number into some other program.

You can change the font face and size of all the fields by clicking the **Font** button **(6)**. You can change the number of decimal places by entering a different number in the # of decimals field **(9)**. For instance, if you are calculating dollars, then 2 decimal places makes sense (12.34). For more accuracy, you can change the number of decimals to a higher number (i.e., 5 would result in numbers like 12.34567).

Dates Calculator

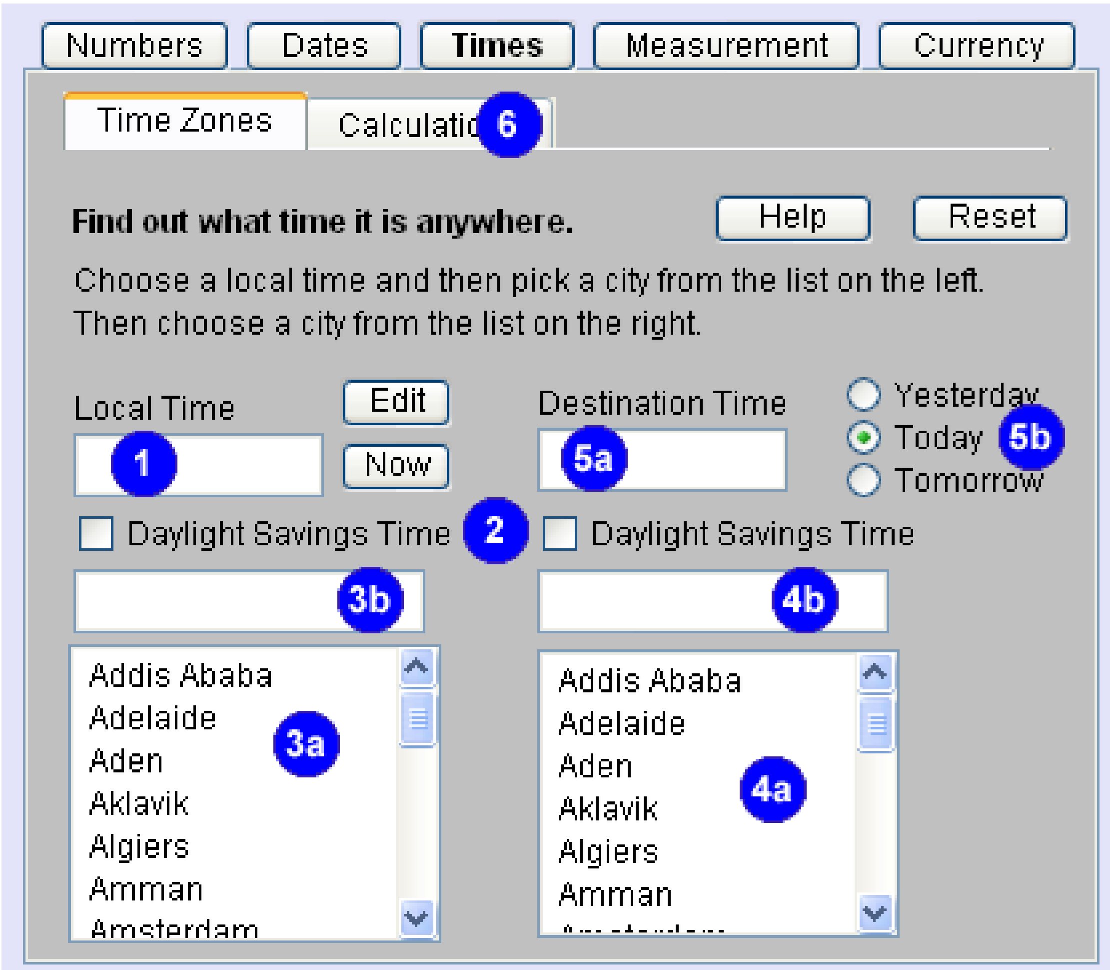


Enter a **start date (1)** by clicking the **Today, Edit or Choose** button above the field. Then enter the number of **days (2)** or choose a number from the option menu **(2)**. By clicking the **Add** or **Subtract** button **(3)**, your answer will appear in the **result** field **(4)**.

To find out the day and week of the year for a particular date, simply enter a **date** by clicking the **Today, Edit or Choose** button above the **date (5)** field. The other fields will be filled in automatically **(6 & 7)**.

Time Zones

The **Time Zones Calculator** calculates different times between major cities.



Enter a **Local Time (1)** by clicking the **Now** or **Edit** button. Then select a city in your time zone from the list on the left **(3a)**. Your choice is displayed **(3b)**.

If either the **Local Time** or **Destination Time** is currently observing **Daylight Savings Time**, click the checkbox below the time fields **(2)**.

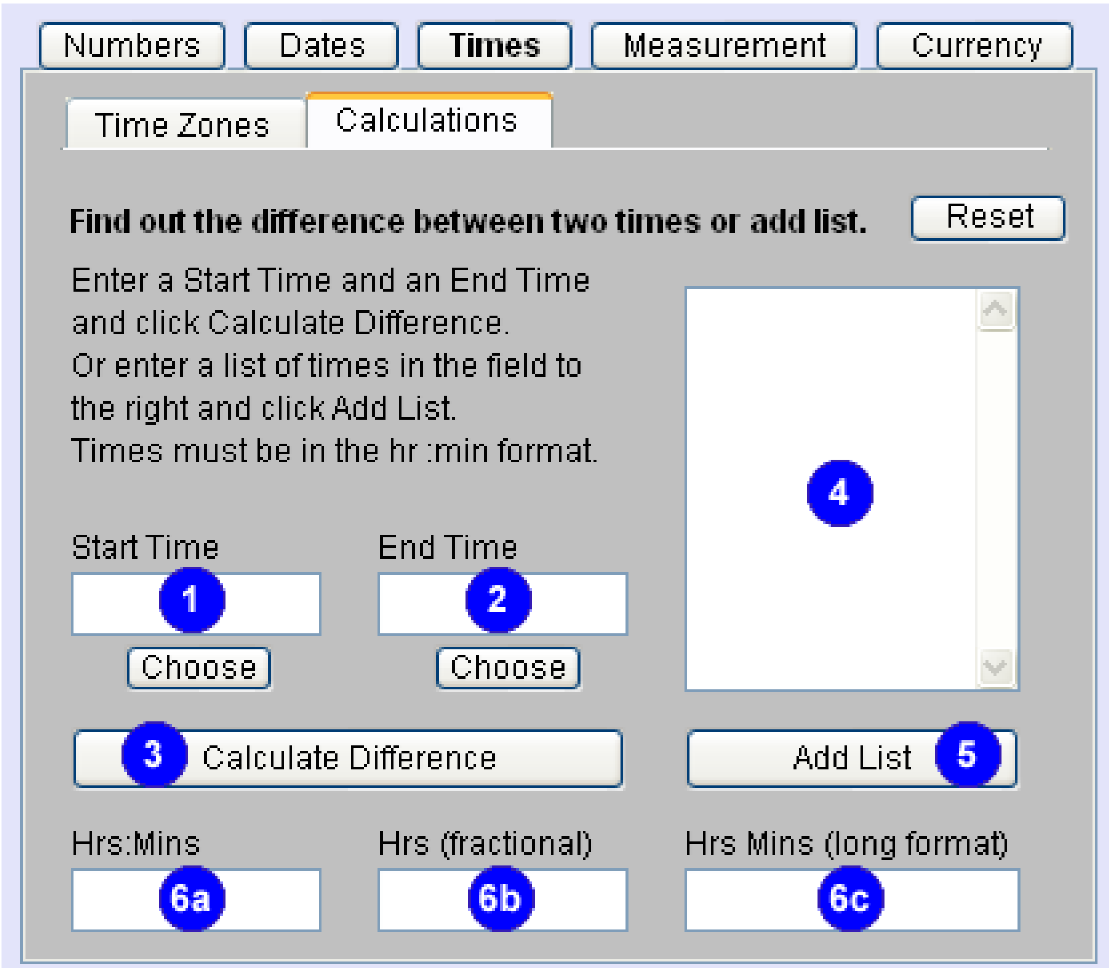
Then select a city from the list on the right **(4a)**. If the city you want is not in the list, pick a city that is in the same time zone. Your choice is displayed **(4b)**.

The time for the city on the right will be displayed in the **Destination Time** field (**5a**). The relative date for the destination time is displayed by the highlight of the **Yesterday, Today and Tomorrow** buttons **(5b)**.

Click the **Calculations** button **(6)** to add and subtract times.

Time Calculator

This **Time Calculator** calculates the difference between times or adds a list of times.

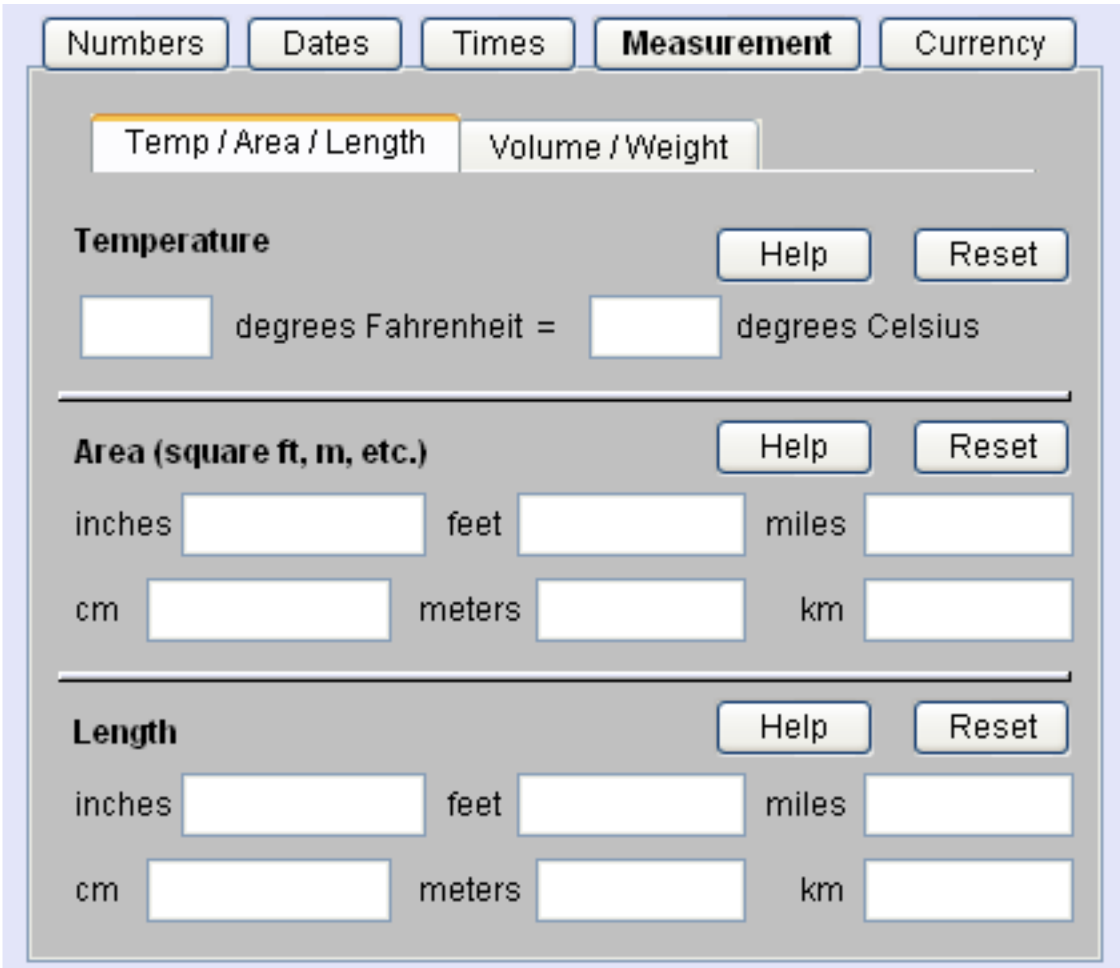


Enter the **Start Time (1)** and the **End Time (2**) and click the **Calculate Difference** button **(3)**. The result will be displayed in three formats, **Hrs:Mins (6a)**, **fractional hours (6b)** and a **long format (6c)**.

To add a list of times, type the list into the field provided **(4)** and click the **Add List** button **(5)**. The result will be displayed in three formats, **Hrs:Mins (6a), fractional hours (6b)** and a **long format (6c)**.

Measures Calculator

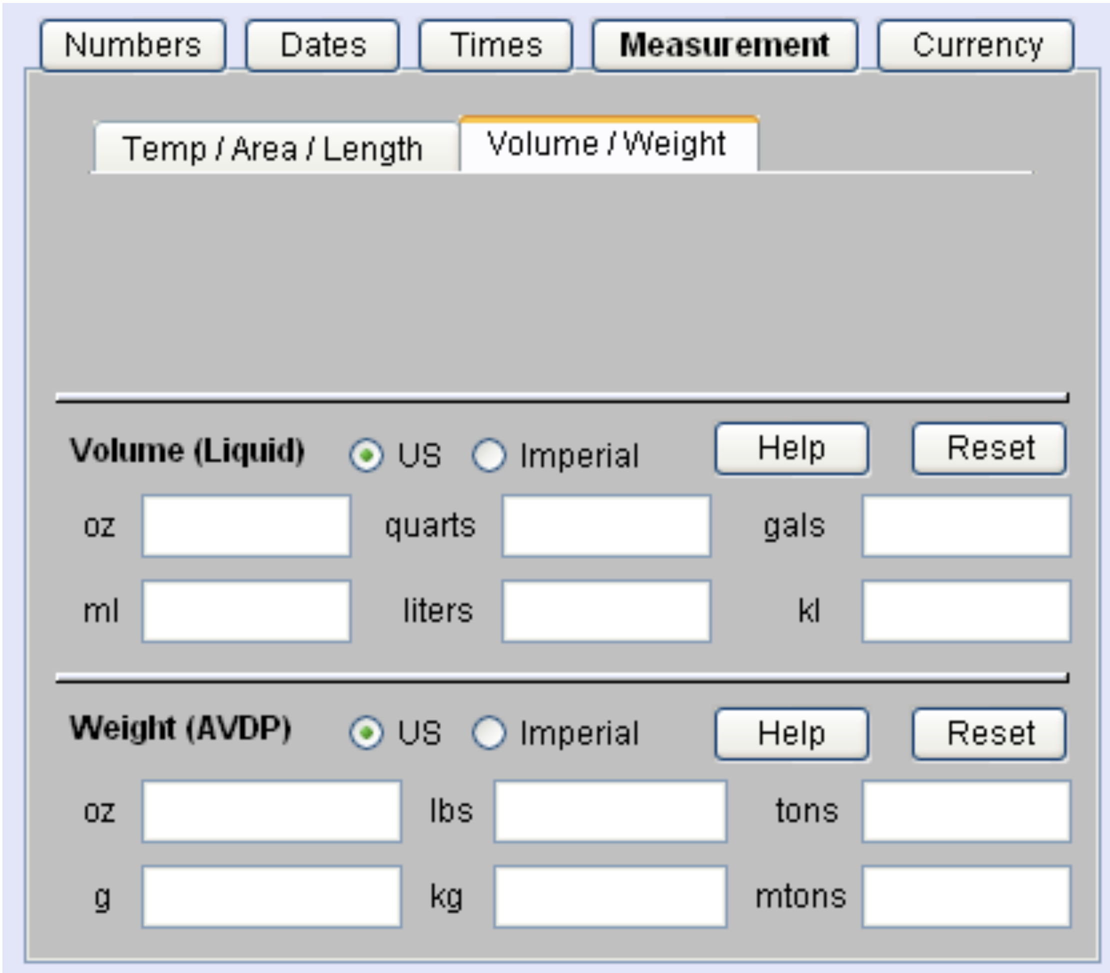
Use this handy calculator to convert temperatures, areas (square ft, m, etc.), length, volume or weight to the standard you need.



Just click on any field in any section and enter a number. The corresponding fields will be filled in automatically.

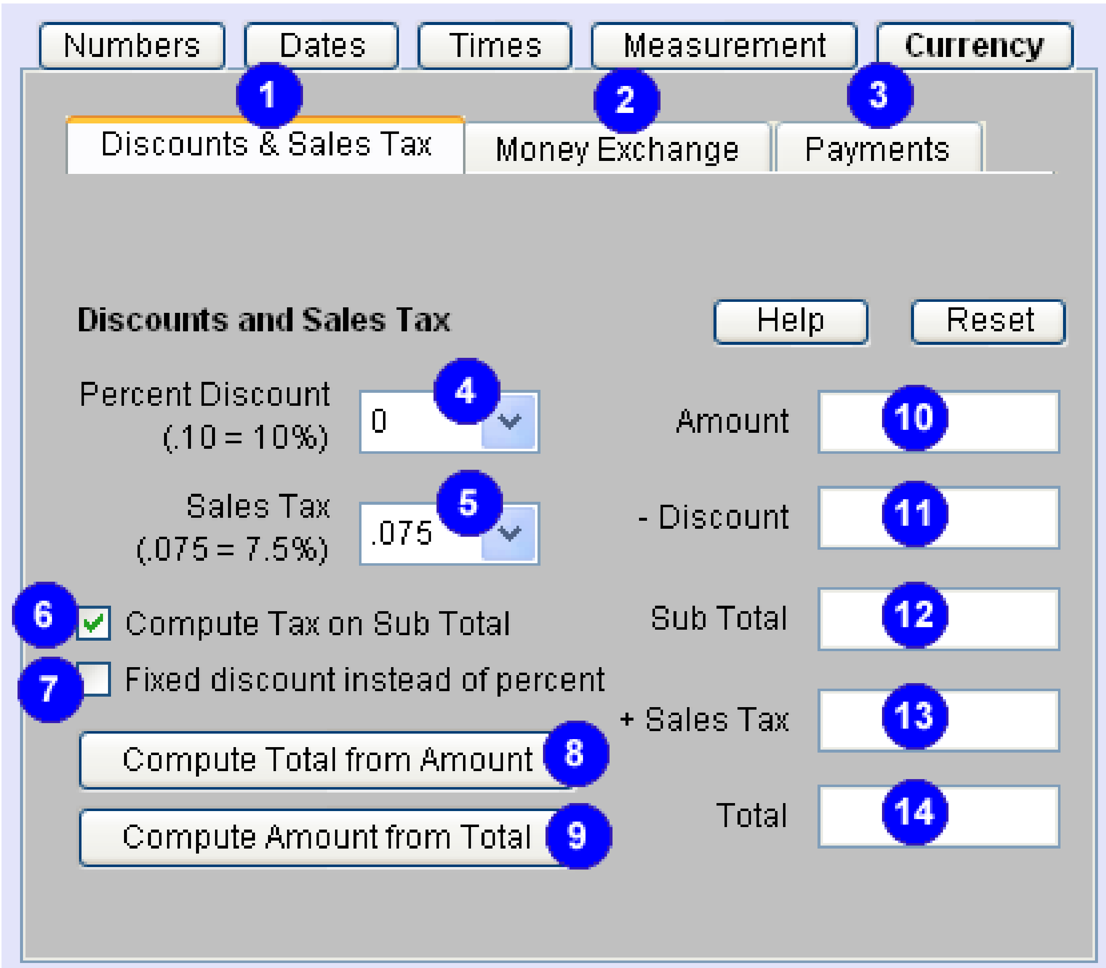
You can calculate **US** or **Imperial** (British) **Volumes** or **Weights**. Clear all fields in the section by clicking the **Reset** button.

Click the **Volume / Weight** tab to access these sections.



Currency Calculator - Discounts & Sales Tax

The handy currency tool that calculates everything from **Discounts & Sales Tax (1)** to **Money Exchange (2)** to **Payments (3)** and Amortizations.



You can figure discounts and sales tax by using the **Discounts & Sales Tax** calculator. You can use the **Percent Discount** menu **(4)** by picking a preset amount or by choosing Other and typing a number.

Pick a Sales Tax (5) from the drop down menu or by choosing Other.

Enter a number into the **Amount** field **(10)** by either clicking that field or the **Compute Total from Amount** button **(8)**. All the other fields will automatically be filled in.

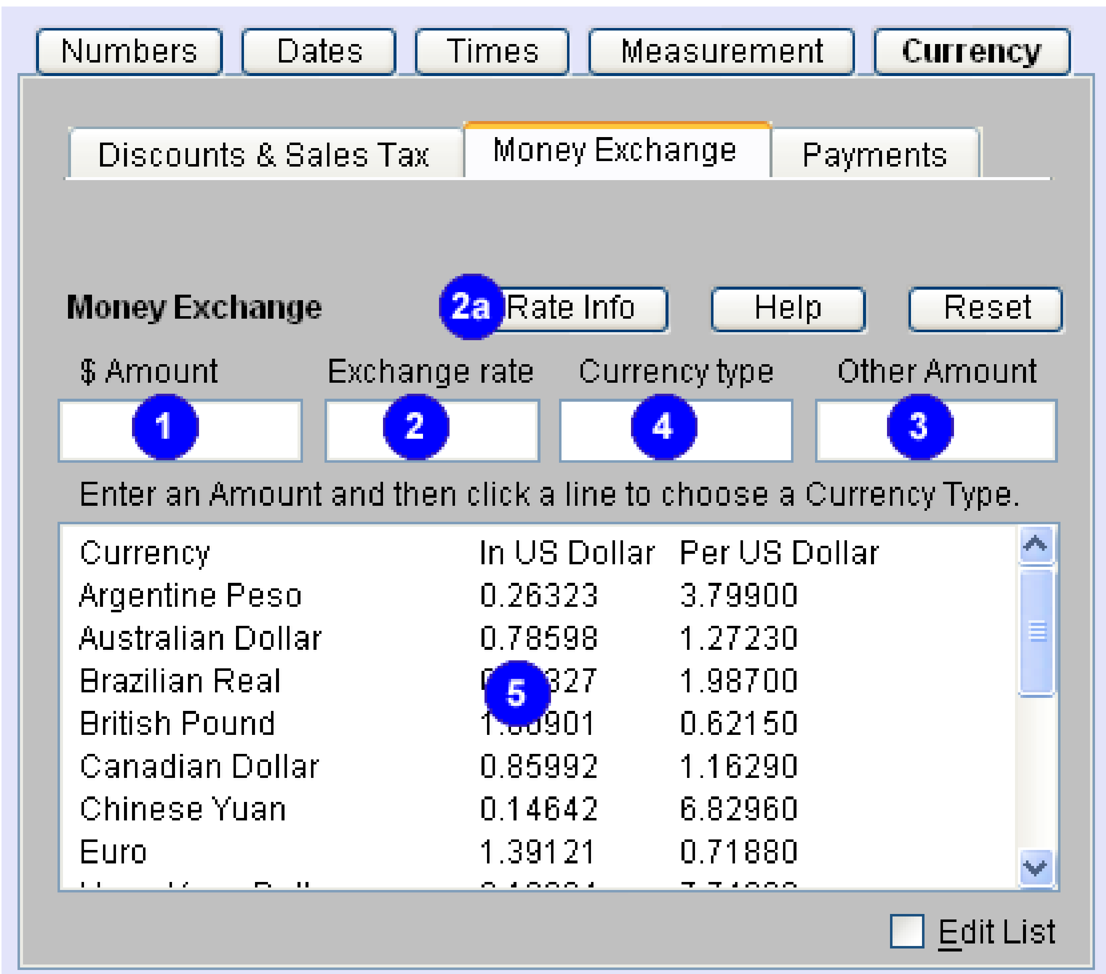
You can also enter a fixed discount by clicking the **Discount** field **(11).** After entering a new discount amount a new total will be calculated. Clicking the **Fixed discount instead of percent** button **(7)** performs the same function.

Normally tax is computed on the **Sub Total** amount, but sometimes you may want the tax computed on the original amount. If this is the case, uncheck the **Compute tax on Sub Total** button **(6)**. A new total will be calculated.

Use the **Compute Amount from Total** button **(9)** to calculate the amount, discount and sales tax from a specified total. After clicking this button, you will be asked for a total and then all the other fields will automatically be filled in. You can also perform this function by clicking the **Total** field **(14)**.

Currency Calculator - Money Exchange

With the Currency Calculator you can convert any currency to any other currency. All you need to provide is the amount and the exchange rate.



Enter the number of dollars (or other currency) that you want to convert into the **$ Amount** field **(1)**.

Click the **Exchange rate** field to enter an exchange rate. For instance, if you get 4.5 of the other currency for each dollar, enter 4.5 into the **Exchange rate** field **(2)**. Click the **Rate Info** button **(2a)** for a link to a web page listing current exchange rates.

The **Other Amount (3)** will be automatically entered after completing steps 1 and 2.

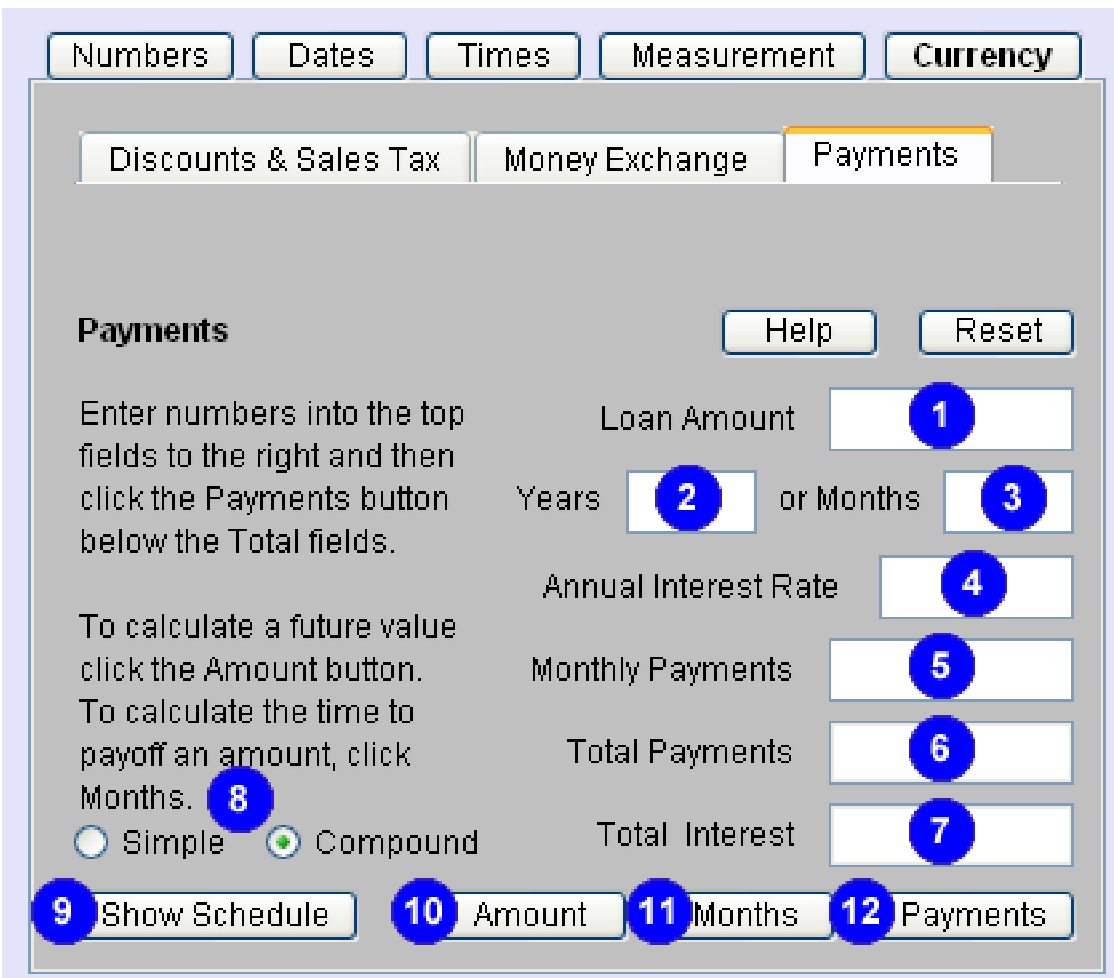
You may also enter a number in the **Other Amount (3)** field to calculate the number of dollars. The **$ Amount** field **(1)** will automatically be updated.

Enter the **Currency type** if desired **(4)**.

You can click any line in the bottom field **(5)** to automatically enter that currency.

Currency Calculator - Payments

You can calculate loan payments and future values of investments with this calculator. You can also figure the total number of months before an amount is paid off.



To calculate Monthly Payments, fill in the **Loan Amount (1)**, the number of **Years (2)** or **Months (3)** to pay, and the **Annual Interest Rate (4)**. The **Monthly Payments (5), Total Payments (6)** and **Total Interest (7)** will be automatically calculated.

Choose either **Simple** or **Compound** interest by clicking one of these **(8)** options.

You can change the **Loan Amount** or length of the loan and then click the **Payments** button **(12)** to get a new calculation.

Click the **Show Schedule** button **(9)** to see a list of the payments and how fast the balance changes.

If you want to know how long it will take to pay for (amortize) an investment, enter the **Initial Cost (1)**, any Interest paid **(4)** and how much per month you are paying **(5)** and the **Months to Pay (3)** will be calculated. You can change the **Loan Amount** or **Monthly Payments** and then click the **Months** button **(11)** to get a new calculation.

For example, I'm considering purchasing a solar electricity package for my home. If I know the initial cost is $20,000 and my Monthly Payments average about $300 then if I figure 7% interest for the loan, I can find out that it will take me 85 months to pay for the new equipment.

You can also find out how much an investment will be worth in the future. Just fill in any **Initial Value (1)** the number of **years (2)** and/or **months (3)** into the future you want to project, and the amount you'll contribute to the fund each month **(5)**. Then click **Amount (10)**.

For example, if you have a mutual fund that has $2000 in it (Initial Amount) and you get an average return of 12% (Annual Interest Rate) and you want to know what it will be worth in 10 years (enter 10 in the Years field and press Enter) and you add $100 a month to the fund (Monthly Payments), when you click the Amount button, you will discover that the fund will have a Future Value of over $45,200.

We hope you are enjoying using *Equipment Rental Tracker Plus*. Please drop us a line if you have any suggestions for ways to make the product even better.

SpiritWorks Software Inc.
support@productivity-software.com