SpiritWorks Software Inc.

Small Business Tracker Deluxe

Time, Expenses, Invoices, Tasks, Contacts, Schedules, Inventory, Passwords, Vehicles, Versions, Writer's Helper and Calculator

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Tips for getting started with Small Business Tracker Deluxe

Here are step-by-step directions for:

Navigation & Common buttons

Use the **Small Business Tracker Menu** button on the Welcome screen, and in the lower left corner of all the main windows, to access all the components of Small Business Tracker Deluxe.

Each component of Small Business Tracker has a **New** button (for creating new records), a **Delete** button (for deleting one or more records), a **Find** button (for searching for text on another record), a **Sort** button (for sorting the records by predetermined fields), an **Import** button (for importing sample or archived records) and an **Export** button (for backing up your data).
You will find a **Help** button on most of the windows in Small Business Tracker. Included in the Help system is a **Tutorial**, which will introduce you to the most important features of that component. Just click the Tutorial button near the top of the Help window. More detailed explanations can be found by clicking the other buttons found near the top of the Help window.

There is also a **Quit** button and a Save button on each main window. 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.

Reports

Each component has its own report feature. In some cases you will use an intermediate screen to select options and sort orders for your report or invoice. In many cases you will go directly to the report. There is a **Help** button on each option window with more information about the report options.

On the output window you will find the following buttons: **Save As...** (saves the output as a text file for archiving or exporting to a word processor for formatting, etc.); **Font** (allows you to specify the size and font of the text in the report output); **Print** (usually just prints the output - you may need to print some reports in landscape mode); and **Edit Report** (allows you to make changes to the report before printing or exporting - when this button is unchecked (its normal position) you can click the main line of each record's output to go directly to that record (accept in Activity & Expense Tracker where you need to use the **Go to Record #** button).

There is also a row of buttons, just above the report's output field, that allows 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.

Tips on using Activity & Expense Tracker

Each "record" in Activity & Expense Tracker consists of the name of the client, the project, the type of activity, the start and stop dates, and start and stop times, the total time, plus any expenses and notes. You can use the **activity timer** to automatically add time information to the record, or add all the information manually by using the **Timer Log**.

It is highly recommended that you create a new record for each activity each day. This will result in more accurate reports so you can see where your time was spent during any particular day. You can add new records or edit the

information for any record at any time.

Before entering your projects and activities into Activity & Expense Tracker, you may want to make a list on a sheet of paper. Sometimes the distinction between a project and activity is unclear. By making a list of activities that might apply to any project, and then making a list of projects that you are currently working on, the difference will become more obvious.

1) To create a new record, start by clicking **New**. You will be presented with a list of **Clients** to choose from. Next you will be presented with a list of **Projects** and then a list of **Activities**. You can choose existing items or add to the lists at any time.

2) You can assign rates (hourly, flat or none) to activities, projects or clients. Just use the **Assign Rates** from buttons. If a rate has not been specified, you will be asked to enter a new rate. You can also assign custom rates just for the current record. Just click on the **Hourly**, **Flat Rate** or **Non-Billable** button.

3) Use the timer feature to keep track of the time you spend on each activity for each day. You can **Start, Stop or Pause** the timer as many times as you wish. You can also view or edit the timer log by clicking the **Show Timer Log** button.

> When you click the **Start Timer** button, any timer that is already running will be stopped, unless you have the **Allow Multiple Timers** option checked.
>
> Instead of using the timer, you can fill in the **Start Time** and **End Time** by using the **Choose** or **Now** buttons. OR you can enter the Start Time and then click the Total Time field to enter the number of hours worked. You can use several different formats for entering the time. 8:30 and 8.30 are both acceptable

4) Keep track of how accurate your time estimates are by entering an **Estimated Time** into the field provided. Then whenever the **Total Time** is updated, the difference between these times will be entered into the **Time Variance** field. These fields can be included in reports too.

5) Keep notes about the tasks performed in the **Activity Notes** field. Add expenses by clicking **Add/Select Expense** and **Expense Notes** at any time. You can also keep track of any **Travel** by filling in the **Miles** and **$/mile** fields (these fields will have different labels if you have changed the currency or distance preferences).

> Click the **Go To** button above the Client or Project field (in Activity & Expense Tracker, Activity & Expense Invoice Tracker, and Version

Tracker) to go directly to either the first or last record of a particular client or project.

If you want to go to the first record of a particular date in any module, just click **Find Date** at the top of the window, and then enter the date. If you know the record number you can click the Record # field to go directly to that record.

The **Table View** button takes you to another window where the records are displayed in a spreadsheet fashion. You can specify a client or project (by clicking on the field) or include all Clients or all Projects. You can also add and remove columns from the table, sort by any column and even expand the window to suit your needs.

Click the **Quick Check** button in Activity & Expense Tracker to get a quick report on the number of hours you've spent on a particular project. You can choose a specific activity or all activities and even specify a range of dates.

Use the **Collapse** button (located beside the Record # field in Activity & Expense Tracker) to make the window smaller. This button then changes to an **Expand** button you can use to restore the window to its normal size. You can move the collapsed window to any location on your screen.

Click **Invoices & Reports** in the lower right corner, to access the report options screen. The reporting features of Activity & Expense Tracker are fairly extensive. They are broken into three groups: **Invoices, Time & Expense Reports and Expense Reports.** Clicking one of the three tabs at the top of the Invoices & Reports window accesses each of these.

Activity & Expense Tracker Reports

The reporting features of Activity & Expense Tracker are fairly extensive. They are broken into three groups: Invoices, **Time & Expense Reports** and **Expense Reports**. Clicking one of the three tabs at the top of the Invoices & Reports window accesses each of these.

Here are a few "Options" that you may have overlooked:

Select one or more clients for a report (but not for an invoice). With the Project & Activity Reports tab selected, click **Select Clients** and choose any combination from the list. Of course if you want to report on all clients, you can just click the All button next to the field under the Select Clients button.

You can also select more than one project for a report or invoice. Click **Select Projects** and choose any combination from the list. If you want to report on all projects, just click the All button next to the field under the Select Projects button.

To include expenses in your reports or invoices, make sure the **Expenses** button is checked. You can only choose specific expenses by clicking the Expense Reports tab at the top of the window. The click the **Select Expense** button to list one or more specific types of expenses. For all expenses, just click the All button next to the field under the Select Expenses button in the Invoices & Reports window.

If you want to add a header that includes information about your company or your customer, click the Add/Edit button next to the **Header** button. A field will appear where you can type in the information you would like included.

You can save what you type to a text file for easy retrieval by clicking the Save as.. button below the **Edit Header** field. This way you can save several different headers and easily include them by clicking the Import button (also found below the Edit Header field). When you are finished editing the header, click the Close button below the Edit Header field.

If you want to add a footer that includes payment terms or other information, click the Add/Edit button next to the **Footer** button. A field will appear where you can type in the information you would like included. You can export or import footer information too.

One other feature, only available when the Invoice tab is clicked, is the **Mark Up Expenses** option. If you check this box and enter a percent number (the default is 25%) all expense totals in the invoice will be increased by that percentage.

To round times to the nearest 15 minutes (or any number you choose), just click the **Round off times** to button in the lower right of the Invoices & Reports window. This option will cause all times in an invoice or report to round to the nearest unit specified in the adjoining field. You can also use the **Round Up Only** option to round times up to the nearest increment, rather than rounding up or down.

You can also specify if you want times displayed as mins or partial hours by clicking the button to the right of the round off time field. If you choose **Mins** then minutes will be displayed normally (ie, 2 hrs 15 minutes). If you choose Hours then minutes will be displayed as hundredths of an hour (ie, 2 hrs 15 minutes = 2.25 hrs).

For example: To round off all times to the closest 5 minutes, select the option and put 5 into the round off time field. To round off all times to the closest .25 hours, click the mins button and choose **Hours**, then select the option and put .25 into the round off time field.

Creating Invoices

The way that I usually generate an Invoice in Activity & Expense Tracker is to first generate a Report with the **Show Record Numbers** option checked. I may also want to **Show Start & Stop Times** so I can check to see that I have not made any errors in recording my times.

Make sure you choose the specific client you will be creating the invoice for, and then click the **Create Report** button. By viewing this report you can easily see if all the records are in order and everything makes sense.

If you see any errors you can note the record number and then click the **Go to Record #** button. You will be asked for the record number and then be taken to that record where you can make any necessary changes.

Next click **Invoice & Reports** and then **Create Report** again until you are satisfied with the results. Finally, click the Invoices tab and then click the **Create Invoice** button. When everything is perfect you can either print it directly from the Invoice window by clicking the **Print** button. Or save the invoice to a text file (by clicking **Save as..** in the Invoice window) for further modification in a word processor. Or you can click **Copy to Email** and then paste your Invoice into a new email message.

In Activity & Expense Tracker Plus:
After generating your invoice you can click the **Transfer to Invoice Tracker** button at the top of the invoice window, which will automatically take you to Invoice Tracker, enter the current date, an invoice number and the amount of the invoice. The Invoice number also gets added to the record and can be viewed at any time by click the **View Invoice** button on the Invoice Tracker record.

In the regular version of Activity & Expense Tracker you also have the option at this point of marking all the Activity & Expense tracker records for this invoice as Invoiced. Just click the button at the top right of the Invoice window. This will help you determine which records are invoiced but not paid, which have not been invoiced and which are both invoiced and paid.

When an **Invoiced** record is paid, click the **Paid** button on the record. If there are more than one records for the invoice, they all will be marked Paid.

If for some reason, you don't want a record to be included in an invoice, click the **On-Hold** button.

On the report window you will find the following buttons: **Save As..** (saves the output as a text file for archiving or exporting to a spread sheet or word processor for formatting, etc.); **Font** (allows you to specify the size and font of the text in the report output); **Print** (usually just prints the output - you may need to print some reports in landscape mode); and **Edit Report** (allows you to make changes to the report before printing or exporting.

There is also a row of buttons, just above the report's output field, that allows 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.

For more information about the reporting Features in Activity & Expense Tracker just click the **Help** button at the bottom of the Invoices & Reports window.

Tips on using Activity & Expense Invoice Tracker

Activity & Expense Invoice Tracker is used to keep track of invoices created in Activity & Expense Tracker (as opposed to invoices created in Invoice Creator). You can easily keep track of and find out who has not paid you, when partial or full payments have been made, and get a report of all income received or due, by clicking the **List Invoices Due** button.

Records in Activity & Expense Invoice Tracker are generally created from the Activity & Expense Tracker invoice window by clicking the **Transfer to Invoice** button in the top right corner of the Invoice window. You will be asked to assign a **Due Date**. When the invoice is paid, you should enter the date in the **Date Paid** field. You can add **Partial Payments** by clicking the **Add** button above the field.

Tips on using Inventory Tracker

Each record in Inventory Tracker will include information about the purchase of a particular quantity of a single product. Each product will have its own record and each time you reorder you can either create a new record or add the new quantity to an existing record by clicking the **Qty** field.

1) Start by clicking the **New** button. You will be asked if you want to create a **Blank Inventory Item** or a **Duplicate** of the current record (use this choice if many of the characteristics of the new item are the same), an **Assembly,** or **Another Type** (these include an **Other Charge**, a **Service - Hourly** or a **Service Flat Rate** item) and new record with a new **Stock Number** will be created.

2) Next fill in the description and other fields on the new record.

- **Service** charges and **Other Charges** just have a **Description** and a **Sales Price**.
- **Normal inventory items** have three descriptions, a **Cost Each, Quantity, Vendor, Vendor's Stock #,** a **Reorder** point and one or more **Sales Price**(s). You can also add a **Photo** of the item. The **Remaining** number of items in inventory gets updated automatically when you add an item to an invoice or make an adjustment by clicking the **Today** or **Choose** buttons

  above the **Date, Qty, Price Sold** field.

Descriptions:

- In Inventory Tracker there are three separate description fields. The **Item Description** field is intended to be used for a more general description.
- The other two **Misc**. description fields can be used for more specific descriptions such as colors or sizes. In the **Inventory Report** section you will be able to sort the report by these two customizable fields if you wish.
- To change the names of the two **Misc**. description fields, just click on the **Edit** button above the field. The labels on all records will be changed to the new names.

3) You can either enter the cost per item in the **Cost Each** field or enter the cost for the whole order in the **Total Cost** field. The other field is automatically updated.

updated.

> When you add more of these items to your inventory, click **Add** button above the **Quantity** field. You will be asked if the cost is the same or different. if you choose **Different**, you be asked if you want to average the cost of the new items. If you choose **No** you will be prompted to create a duplicate record and will have the option to discontinue the older item. A new record (with a new **Stock Number**) will be created.

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

> If you normally order (or create) inventory only after generating an invoice (ie, special orders only or drop shipping), click the **n/a** button above the **Total Cost** field and choose **Special Order**. Then click the **Create Purchase Order** button whenever you get an order and want to request more product from your supplier.
>
> If you have an unlimited supply of inventory on hand, click the **n/a** button above the **Total Cost** field and choose **Unlimited**. Otherwise enter the total amount of items on hand into the **Quantity** field.

5) In addition to adding the name of the **Vendor**, you can also specify the **Vendor's Stock #** and the point at which you want to **Reorder** the item from the Vendor (this is the minimum quantity of the item you want to have in stock). You can click the **Create Purchase Order** button to create a PO for all the items that need to be reordered from that **Vendor**.

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** and then **Quantity**.

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

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.

When you click the **Add** button above the **Quantity** field, you will be asked for the number of Assemblies to add to inventory. 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 asked if you want to decrease the number to be added or create back orders for the component(s).

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

Other Features:

Entering a **Stock Number** is required by Invoice Creator. You can change the number that is automatically assigned to the inventory item by clicking the field.

You find any record by clicking the **Go To** button (above the **Stock Number** field) and entering a stock number, or by clicking **Go To Another Item** (above the **Description** field) and picking an item from the list that is presented.

> If the selling price of your products does not ever change, use the padlock icon near the **Sales Price(s)** field to suppress the dialog for entering the price as described above. You can also add password protection to the **Sales Price(s)** if you wish. Just click the padlock icon, click **Yes**, then enter a password. You will need this password to unlock the field to make changes on any record.

To find out what items need reordering, just click the **Check** button above the **Remaining** field. When you open Inventory Tracker for the first time on any particular day, items that need reordering are automatically checked.

If you want to go to the first record of a particular date, just click the words **Purchase Date** at the top of the window, and then enter the date. If you know the record number you can click the **Record #** field to go directly to that record.

Click **Inventory Report** to access the Inventory Report Options screen. Here you can choose from many options and types of reports including: a **Sales Report** (a list of items sold), a **Price List** and a normal inventory report that lists information about one or more items in the database. Choose specific items by clicking **Select Items**. For normal reports there are two **Sort Orders** to choose from. You can also filter by **Dates** and **Vendors**. Click **Help** in that window for more info.

Tips on using Invoice Creator

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

1) The **Payment Date** is automatically entered when you create a **New** record. An **Invoice #** is also generated. A list of customers in Contact Tracker is presented. You can also access this list of people by clicking **Add/Select Customer**. You can add a new customer by clicking **Add Customer** button at the bottom of the Customer window.

2) Next, choose a product from Inventory Tracker by clicking **Add Product to Invoice**. You will be asked for the number sold and the selling price. The total is displayed in the **Invoice Amount** field.

3) Add or choose a Sales Representative by clicking the **Add/Select Sales Rep** button

4) You can add **Sales Tax** by clicking the **Edit%** button. The total tax is displayed in the Sales Tax field. Type any Shipping Charges directly into the **Shipping Charges** field.

5) Discounts can be applied to just Inventory Items, Inventory Items and Other Charges, Inventory Items and Service Charges or all of these. Just click the **% Discount** field, enter the percent and then you will be asked if you want to discount **Services, Other Charges, Both or Neither.** Inventory items are always discounted.

6) Add **Notes** or other charges such as Labor to the Notes field. You can add amounts in this field to your invoice total by clicking the checkbox above the field.

7) Click **Other Info** to reveal these other fields and options.

- Choose a **Carrier** (or add one to the list) and then enter the **Tracking #**.
- Choose your payment terms (or add one to the list) from the **Terms** menu
- Enter a **Due Date** by clicking the **Choose** button above that field.
- When you are paid, click the **Choose** button above the **Paid** field**.** To create a receipt, click the **Change** button above the **Payment Date** field and then

click **Create Invoice**.

8) Clicking the **Create Invoice** button totals all amounts and creates a printable invoice that is easy to export. You can also Create a **Packing Slip** or both an Invoice and Packing Slip. Easily create an **Envelope** or **Shipping Label** with the buttons provided.

In the Invoice or Packing Slip window you can add a logo and other styled text to create a letter head. Click the **Edit Header** button to add your logo and modify the size, style and position of the name and address fields. Click **Help** in that window for more info.

Create reports on all the invoices in the database by clicking the **Invoice Report** button. You can choose a **Date** range, specific **Customer**(s) and **Sales Rep**(s) and a **Sort** order for your report.

When you click the **Delete** button in Invoice Creator you will be asked if you want to delete **All records** or Just this one. If you choose **Just this one** you then be asked if you want to **Modify Inventory Records too**. If you choose this option the products on the Invoice Creator record will be returned to inventory (deleted from the **Date, Qty & Price Sold** field and added to the **Remaining** field on the Inventory Tracker records.

Tips on using Expense Tracker

You can keep track of all your expenses and easily generate **Tax Form Reports** in Expense Tracker. This component comes with a built is list of expense types which you can add to if necessary.

1) Start by clicking **New**. You will be asked if you want to **Duplicate** the current record or transfer just the **Payee/Expense** or **Account** information. Or you can start with a blank record.

- If you choose **Duplicate** you will be asked for the new expense **Amount**.
- If you choose **Payee/Expense** you will be asked to choose an **Account**, and then a new expense **Amount**.
- If you choose **Account** you will be asked to choose an **Expense** type, a **Payee**, and then a new expense **Amount**.
- If you create a new blank record you will be asked to choose an **Expense** type, a **Payee**, an **Account**, and then a new expense **Amount**.

You can either add an expense amount directly into the field provided or you can create a list in the **Notes** field and then click the **Add to Expense Amount** button. Any numbers not proceeded by the **#** sign will be added to the expense **Amount**.

If you use the standard mileage rate on your tax forms, then you can use the handy **Travel Deduction** calculator to enter the Miles (or Kilometers) and rate. This information will then be available for the **Tax Form Reports**.

Account Register

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

At the top of the window you can choose another **Account**, **Add Deposits & Payments** (creates a new Income Tracker record), add a **New Expense/Debit** (creates a new a new Expense Tracker record), a **Dates** range (or a **Start Date** and **End Date**) and whether to display **Descriptions** or not. You can also add **Daily Separators**.

After clicking the **Add/Select Account** button in the Account Register, Expense Tracker, or Income Tracker window you are presented with an **Account** management window. There you will find fields where you can record the **Account #, Account Type, Starting Balance**, and the **Last Check # Used** for each Account and buttons to **Create, Modify or Delete Accounts**. A **Current Balance** for the account is automatically calculated.

Beside the Check # field is a **Cl** option which signifies that the check has cleared the bank. The Account Register report lists checks that have cleared (the **Cl** checkbox has been clicked on the Expenses record) as [C] and not cleared as [ ]. You can use this feature to reconcile your checkbook or account statement.

Other Features

Above the **Check #** field is a **Print** button. When clicked a new Check Printer window opens where you can print your checks on any blank check. For more information click **Help** in this window.

Clicking the **Shopping List** button above the **Notes** field 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 (so you can take it with you to the store), **Sort** the list and **Close** the window.

You can save up to four different shopping lists by clicking **Save Default List** and then retrieve them by clicking **Restore Default List**. These can be used as starter lists for different stores and then modified as needed.

Expense Reports

Click **Expense Report** to generate a regular expense report or a Tax Form Report, or a 1099-MISC form. With **Expense Report** selected, you have many choices and can select one or more **Expense** types, **Payees** and **Accounts.** With **Tax Form Report** selected you have fewer options, but you can choose and range of **Dates** by using the menu or the **Start Date** and **End Date** fields.

Tips on using Income Tracker

Income Tracker is used to keep track of deposits to accounts and income that is not included on a Invoice Creator record such as vending machine income.

1) Click **New** to begin. You will be asked if you want to **Duplicate** the current record or transfer just the **Source/Account** information. Or you can start with a blank record.

- If you choose **Duplicate** or **Source/Account** you will be asked for the new income **Amount**.
- If you create a new blank record you will be asked to choose a **Source** of the income, an **Account**, and then a new income **Amount**.

  Click **Add/Select Source** and then **Create Source** to add a new source to the list.

2) Choose a **Source** and an **Account** from the lists or create new ones.

3) Enter the **Income Amount**. You can enter the **Tax Type** and the amount of **Tax Collected.**

There are two miscellaneous fields you can use for any purpose. One is in the upper right hand corner and the other is below the **Source** field. Click the **Change** button above either of these fields to modify the label for the field on all the records.

You can specify the type of income and record a check number if appropriate by clicking the **How** button. The choices of **Cash, Credit Card, Check or Other** will appear. Click the **How** button again to hide these options.

Use the **Account Register** button to view income and expenses for any **Account**. An identical button is provided in Expense Tracker. See the **Account Register** section above.

Click **Income Report** to generate a list of Income Tracker records to print or save.

Tips on using Contact Tracker

You can use Contact Tracker to keep track of information about customers, vendors, family and friends. This component contains several useful tools, such as a **Mailing List** (form letter generator), a **World Time Map**, an **Area Code Locator**, and a **Best Friends Forever List.**

1) Begin (as usual) by clicking **New**. The fill in the **First Name, Last Name** and **Company Name** (if appropriate). There are two sets of address fields accessed by clicking **Mailing** or **Shipping.**

> The **Address Format for this Contact** menu 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** window that becomes the Default, but you can specify a different format for each contact if you wish. The **Address Format** settings apply to Contact Lists, Envelopes, Mailing Lists, and Invoice Creator invoices, packing lists, labels, etc.

2) Enter other information such as: **E-mail, Phone Numbers, and Family** or **Associates**. Choose a contact **Type** from the menu provided. Choices include:Client, Customer, Guest, Friend, Family, Vendor, Owner, Employee, Sales Rep, or Other). A **TaxID#** field appears for Owners and Employees, and an **Employee #** field appears for Employees. A **Customer #** field appears on Contacts with the **Type** of Customer. You can **Sort** records by Contact Type.

3) Contact Tracker has four **Miscellaneous** fields that you can use for any purpose. These are accessed by clicking the **Show Misc. Fields** button. To change the label, just click on the **Change** buttons above them. The labels on all records will be changed to the new names. You can **Sort** your contact list by these fields.

> To print out the information for a particular record, click the **Prepare Envelope** button. You can print just the name and address or all the information from the record by clicking the **Show Email, Phone & Notes** option. You can also add a **Return Address** to your envelope by using the option provided.

You can print out some or all the information on every record by clicking **List Contacts** in the main window and then choosing the various options provided. You can also choose a sort order for your list. To generate a list of just email addresses, select only the E-mail option. You can also add the Name option if you wish.

Click the **Area Codes & WTM button** 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.

Clicking the **Area Code Locator** opton brings up a window where you can enter an area code. After clicking the **Search** button, several major cities within that area code will be listed. Or if you know the city's name and want to know the area code, you can enter the first few letters of the name into the field near the center of the window.

> You can also just scroll through the bottom field to find a city name. You can add cities or change area codes in the bottom field by typing the city name, a tab and then the area code on a new line. (The tab is very important and if you add a line, you should put it into the correct alphabetical order.) A list of international codes is available on request.

The **Mailing List** button allows you to create a form letter for any or all of your contacts. First you will see a Contact Chooser window where you can specify which contacts to send the letter to. Then click **Create Form Letter** and then **Edit Form Letter Template** in the Send Form Letters window to create your letter.

You can add a logo and create a letterhead by clicking the **Edit Header** button. You can also print envelopes by clicking **Prepare Envelope** in the Send Form Letters window. Click **Help** in that window for more info about modifying the

Letters window. Click **Help** in that window for more info about modifying the header. Click **Help** in the Contact Chooser window for more info about the Mailing List feature.

The **BFF List** button brings up the Best Friends Forever List window where you can add friends that you want easy access to. Click **Help** in that window for more info.

Tips on using Schedule Tracker

Use Schedule Tracker to keep track of appointments and print calendars.

1) Start by clicking **New** and choosing a date for the event.

2) Next enter an **Event Description**. You can also enter a Location and a Purpose, but these fields are optional.

3) Enter the **Start Time** and **End Time** by using the **Edit** or **Choose** buttons be each field. These fields are also optional. If neither is filled in the event will be scheduled for the entire day.

4) If the event is a repeating event, choose one of the following from the **Click to repeat** menu: **Daily, Weekly, Weekdays, Day of Month, Monthly, and Yearly**.

> If you choose **Daily or Weekly**, you will next have the option of specifying if the event repeats every day or week or every other day or week.
>
> *Next you need to enter a date to stop repeating the event* by clicking the **Edit** or **Choose** button that appears above the **Until** field near the middle of the window.
>
> If the **Until** date you choose does not match the logical last date for the event (for instance, if you have a repeating event for the same day every month, and the Until date you choose is not the correct day of the month) then the correct day will be entered.
>
> You can edit the list of repeating dates by clicking the **Show Repeat Dates** button that appears below the **Until** date field. If you make changes to this list, make sure you have only one date per line, don't leave any blank lines or use a different date format.

Use the **View Schedule** button to create a text file that you can print or export to another program. You can choose the current **Day, Week or Month** or specify a **Start Date**. If you click **Other** you will be asked for an end date.

Click the **Month, Week or Day** button below the **Notes** field in the Schedule Tracker window to view a table view of your schedule.

> In the Weekly View and Daily View window there is a **Table Options** button that allows you to specify the **Start and End Times** for the table as well as the time increments (:05, :10 or :15 minutes).
>
> In the Daily View window you can also choose what to display in the three columns. 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 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).
>
> In the Monthly View window there are two small arrows at the top left
>
> corner which toggle a **Month** menu with a **Start Date** field. Click the **Choose** button to select a date in the week you want to be the first week of the monthly calendar.

Clicking the **Add to Schedule** button in Task Tracker will automatically add the

Clicking the **Add to Schedule** button in Task Tracker will automatically add the task to Schedule Tracker. You will need to choose a date and perhaps a time for the event. You can also specify a location and purpose for the event.

Tips on using Task or Goal Tracker

Keep track of all your things to do and assign priorities, deadlines and notes with this simple tool.

1) Click **New** and enter the **Task or Goal Description**.

2) Choose a **Deadline** and enter any **Notes** you want to reference.

3) Set a **Priority** for the task. Records and reports can be sorted by **Date, Priority, Deadline or Task**.

4) When each task is done, just enter the date in the **Completed** field.

Click **Tasks To Do Lists** to see a list of all your tasks. You can show **All Tasks, Urgent Tasks, Uncompleted** or just **Completed** tasks.

> You can also use the **Add to Schedule** button to open Schedule Tracker and create a new record. Then you will have two ways to help remind you to get the task done.

Tasks can be added to the Daily View (or **Daily Briefing**) by clicking the **Table Options** button.

Tips on using Password Tracker

Use this simple utility to keep track of all your passwords.

1) Click **New** and then enter a description of the **Account, Program or Web Site**.

2) Next enter an **ID# or User Name** and a **Password**. Passwords are encrypted when stored or exported (but this is not a very strong encryption).

> You can use the **Password Generator** to create very secure passwords. Read the **Password Tips** help topic for information on creating your own secure user name and password combinations.

Click **Password Report** to generate a list of passwords. You can use this list to quickly locate any record in the database.

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Tips on using Vehicle Expense Tracker

This component keeps track of all your auto or truck repairs and maintenance. You can also enter **Fuel Stop** information including the number of gallons (or liters) purchased, the price and amount.

1) Click **New** and then **Create Vehicle** and enter the year, make and/or model of the vehicle. Click **Choose Vehicle** to transfer to the Vehicle Expense Tracker record.

2) Click **Add/Select Expense** and choose to create an expense type. If you choose **Fuel Stop**, five new fields will appear. Fill in the number of **Gallons**, and the **$/Gal,** and the **Fuel Cost** will be calculated. **Trip Miles** should be calculated if you always enter an **Odometer** reading. **Miles/Gal** will be calculated when you click the **Compute** button.

3) Fill in the **Expense Amount** and **Odometer** reading. You can also note the **Time** and keep any **Notes** you want.

Use the **Fuel Calculator** to find out about the fuel efficiency of the vehicle.

> Use the **View Service Record** option to record when each type of maintenance was last completed by whom and what the odometer reading was. A quick periodic review will remind you of upcoming service requirements.

You can create an **Expense Report** for any or all vehicles, expense types or dates.

Tips on using Version Tracker

This simple component will help you keep track of differences between versions of any projects you are working on. This could be software, documentation, etc. You can easily generate a **Version Report** for managers or read me files.

1) Click **New** and choose or create a **Client**.

2) Click **Add/Select Project** and choose or create a project.

3) Enter the **Time, Version #**, a **Short Description**, and any **Change Notes.**

You can create a **Version Report** for any Client or Project.

Tips on using Writers Helper

This tool is a simple word processor that will help you get your ideas, articles, letters, etc, written down in a undistracting fashion. You can keep track of the version or **Draft #**, and even find out the number of words used. Then you can **Print** or **Save** the text as a .txt file for exporting to a word processor.

Keep plenty of **Notes** about your topic in the field provided (which can be made larger by clicking the **Expand** button above it). **Writing Tips** used by professionals are also included.

Tips on using the Universal Calculator

The Universal Calculator has several tools you will want to explore. In addition to a simple **Numbers** calculator, it will also add or subtract **Dates** that are some number of days before or after a date you specify. You can also find out what **Time** it is anywhere in the world and compute time differences.

The **Measurement** calculator easily converts just about any US or British length, volume or weight to its metric equivalent or the other way around.

The **Currency** calculator is divided into three sections. Click the three tabs to access the following options. The **Discounts & Sales Tax** option easily computes discounts and sales tax on any amount. The **Money Exchange** option computes the amount of foreign currency that a number of dollars is worth (or the other way around) given the current exchange rate. The **Payments** option lets you compute loan payments, amortizations (months to pay for something) or the **Amount** an investment will be worth in the future.

Preferences

Click **Prefs** in any main component window to access the Preferences window. There are four sections, **General, Colors, Formats and Translations.**

In the **General** section you will find **Monetary Symbol & Format** controls, along with **Tax Type** and other preferences. Click the **Help** button for more information.

> Most users will want to have certain windows open all the time, and others open only when needed. You can open and arrange any number of windows on your screen, as long as the **Open Components in a New Window** option in the Preferences window is enabled. If you would rather have only one window open at a time, disable this option.

In the **Colors** section, you can change the button and background colors of each component. Click the **Background Colors** option to show a list to choose from. Click the **Button Colors** option to show another list to choose from. You can **Use these colors in all windows** or choose different colors for each window.

> To set different colors for each component, start by clicking the **Prefs** button in that component and then selecting new colors from the two lists in the Preferences window. If you want to return to the original colors just click the **Default Settings** button in the Preferences window. To save your new colors, close the Preferences window and then click the **Save** button in the component's window.

In the **Formats** section you can change the **Time Format, Distance Format, Date Format** and the **Liquid Format.** You can also add **International Version** features. Click **Address Preferences** to change the **Address Format** used for printing.

Backing Up and Recovering Missing Data

It is always a good idea to backup your data on a daily or weekly basis.

There is an **Auto Backup** feature that will create a backup file whenever you click the **Quit** button in any main window. After creating a backup file, it is a good idea to open it in a text editor and make sure the most current records are included. Then close the file (without saving any changes) and ***copy the .bak file to another disk*** (floppy, cd, etc.)

> You can also click the **Export** button in any component and then choose to create a **Backup** file or an **Export** file of just the records in that component. You will need a current backup file whenever you update the software. You can also use the **Backup Records** button on the Welcome screen for this purpose.

Occasionally during a save or a crash, a database will get corrupted. If this happens the name of the component will not appear in the main **Menu** button. Fortunately the file is always saved with an .rev~ extension first. So if you ever have problems opening a component, look for a file with the .rev~ extension in the application's folder. (In Windows look in your Documents folder.) If you see one, delete the file with the same name (but without the .rev~ extension) and then rename the .rev~ file to just .rev. For example, if contacts.rev were to get corrupted, you will find an contacts.rev~ file. Just delete the contacts.rev file and change the name of contacts.rev~ to contacts.rev.

By backing up your records frequently, and copying the backup file to

another disk, you can be sure your data can be easily restored to a new copy of the software, in case something goes wrong with your computer.

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