Phase25 Applications Guide

Version 8 – January 2025

Phase25

Small Business Software Built with Enterprise DNA

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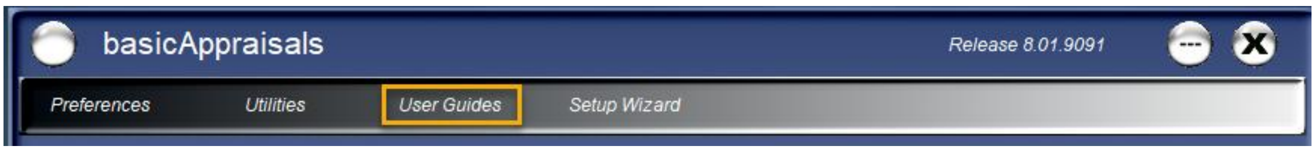
Phase25 Applications Guide

Overview

This guide is a resource for users of all Phase25 software products, Version 8.x. All of our software products have similar features and utilities. When you learn how one product works, you could immediately work in any other. This document will show you the extraordinary flexibility and customization options for any Phase25 application.

For additional information, click on Main Menu >> User Guides to open our Support site. All user guides and video tutorials are FREE!



NOTE: Some of the screen prints in this document show they are from **basicAppraisals**, however the features and steps are the same for any Phase25 software product.

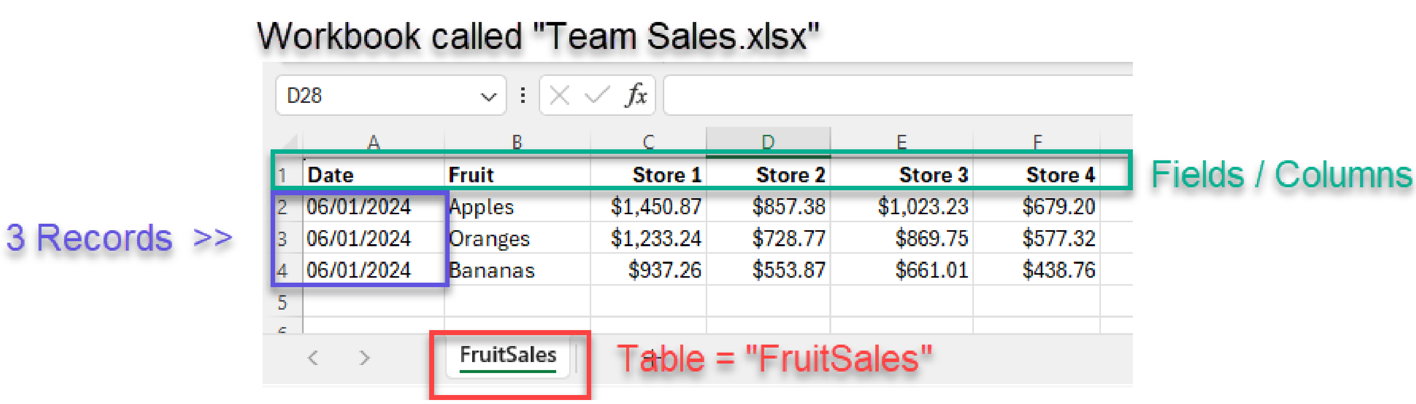
Terms

First, let's all get on the same page. We'll define some of the terms used in all of our guides and tutorials.

Databases, Tables, Records, Fields

Database – A database is a file that stores the data you enter in the system. It groups the information together in **Tables**, which store the same type of data. Each row is a single **Record**, and each column stores the data for the same **Field**. If you are familiar with Microsoft Excel, think of it like this:

- the Excel workbook is the database (Team Sales.xlsx)
- each worksheet in the workbook is a table (FruitSales)
- each column in a worksheet is a field (field names = Date, Fruit, Store 1, Store 2, Store 3, Store 4)
- each row in the worksheet is a record (3 records)



Parent & Child Tables & Records

Child tables are tables of data that "belong" to a single record (the **Parent** record). Think of a receipt you get when you purchase multiple items at the same store. There's only one receipt, which will summarize and total the individual items. But there are multiple items and charges on the receipt. The receipt is the **Parent** record, the items are the **Child** records. This is a good example of a "parent-child" relationship when looking at data. It's also called a "one-to-many" relationship: one receipt (parent) with one or more children (items purchased).

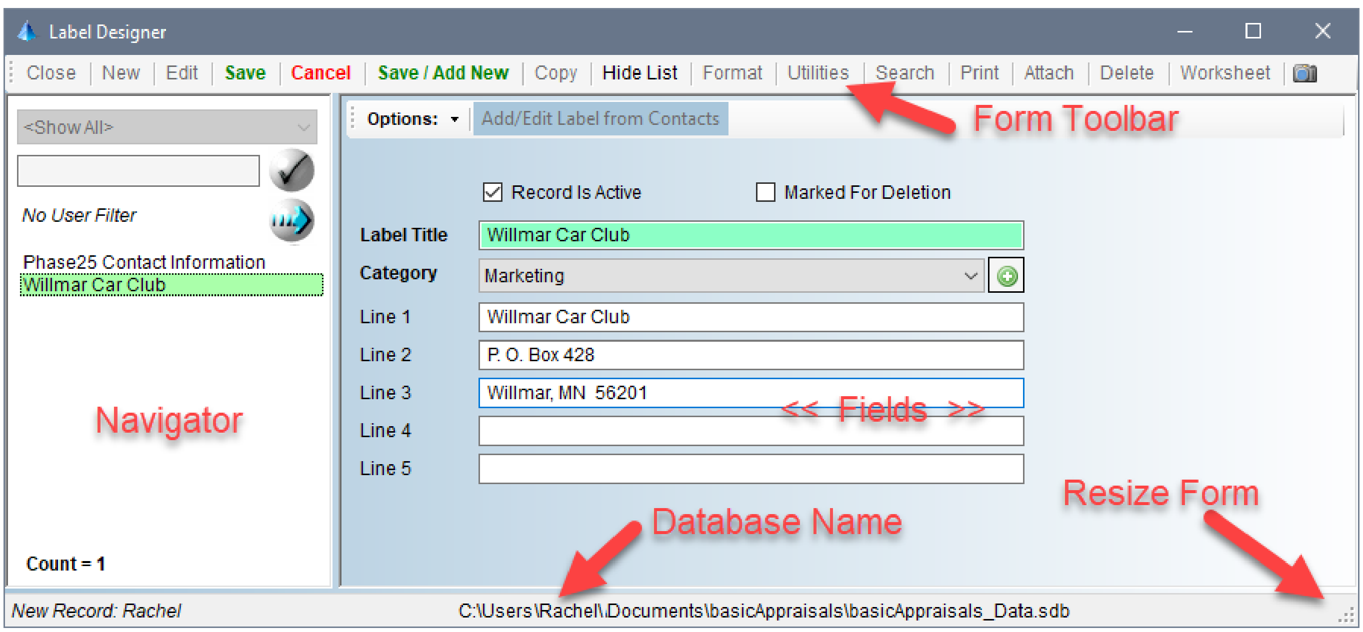
Forms

Every table needs a way to display a record so it can be added or edited. To do that the field data is displayed in a **Form** where each field is labeled and users enter the data for that field.

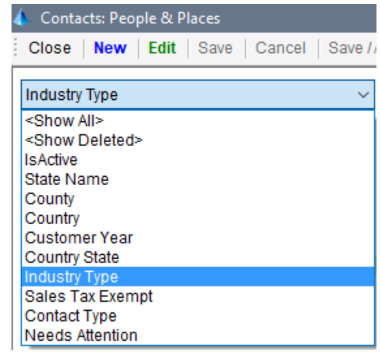
Each form has a standard **Toolbar** and a **Navigator**. The Navigator displays a list of all records in the table. When you click on an item in the Navigator, that record is displayed in the **Fields.**

Resize Form – This is important! The first time you open a form, it will try to resize correctly to display all of the fields WITHOUT a scroll bar at the bottom or side of the page. However, with all of today's options for screen resolution and monitors, you may see those scroll bars, which then means the form is too small to show all of the fields. Just grab the corner of the form (hold down your mouse button), and drag the form larger until the scroll bars disappear. When you close and reopen the form the size is "remembered" and the form will be sized to fit correctly.

The same applies to the width of the Navigator. Hold your mouse over the bar which divides the Navigator and the form, and drag it left or right to resize the list.



The Navigator



This list shows the link to each record in the table, and is sorted in a logical order, depending on what data the table stores.

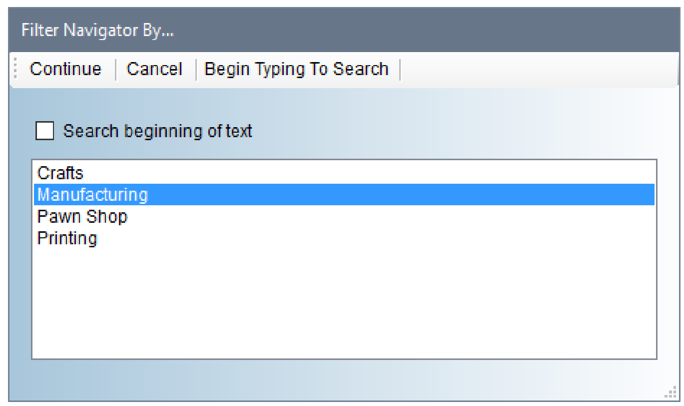
In this example, it makes sense that the Navigator would show the customer names in alphabetical order. The additional information (City, State, Zip Code) helps identify each record if there would happen to be identical names for two different people or companies. When you click on a name, the form loads the record into the fields. Double-click on a name to change the form to allow editing (**Edit Mode**).

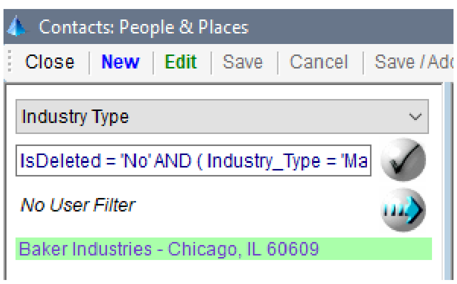
Filtering the Navigator

The Navigator has filtering and search features. The drop-down list at the top defaults to **<Show All**>; however each table will have its own options for filtering the Navigator based on field values.

For example, the **Customers & Contacts** table in **basicAppraisals** has the fields (above) that you can filter it by. Click on **Industry Type.**

A list of all of the **Industry Type** values found in the table will be displayed for you to choose from. Click on **Manufacturing** and the Navigator will reload with only those records that match.





Choose <**Show All>** from the Navigator list to show all records again.

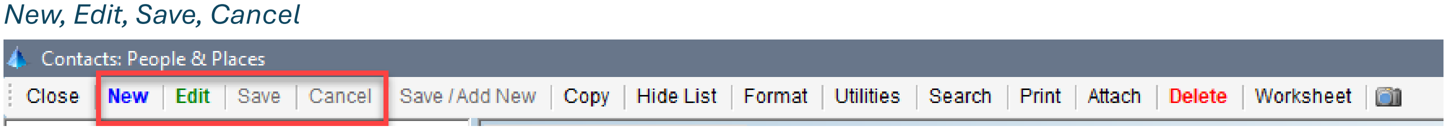
Searching the Navigator

You can use the **Search** field on the top of the Navigator (below the Filter drop-down list) to quickly find a specific record where you know part of the text. Type in the partial text and hit **Enter** on your keyboard. The first matching record will be selected and displayed on the form. Hit **Enter** again, and the next match will be selected. You can continue to hit **Enter** and cycle through the entire list. When it gets to the last match in the list, it will start over at the top of the list.

The Form Toolbar

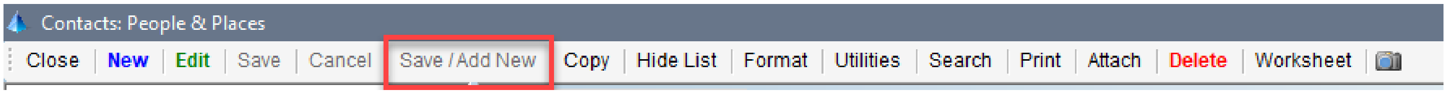
The **Form Toolbar** has these options:

New, Edit, Save, Cancel



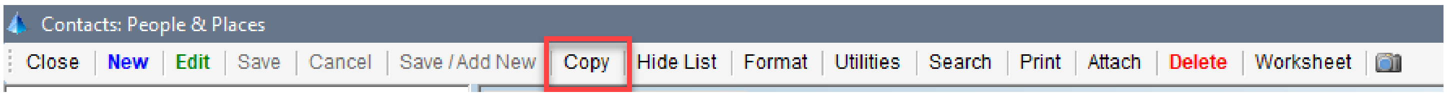
Use these to add a new record or edit the selected record. You can also double-click on the name in the Navigator to **Edit** a selected record.

Save / Add New



If you're adding more than one record, click the **Save / Add New** button when saving the first record. The current record will be saved and the form will clear, ready for the next new record. This is a shortcut for clicking the two buttons, **Save** and **New** (one less mouse-click!).

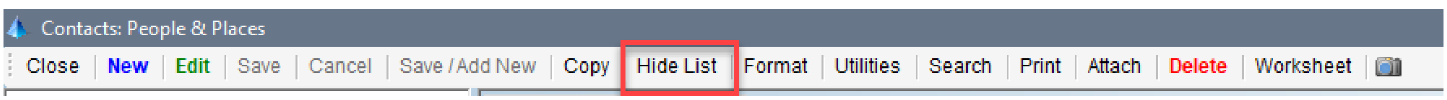
Copy



If you want to make an exact copy of the current record, click **Copy** on the toolbar. You'll be asked "How Many Copies?"… enter a number, one to ?, and click **Continue**. The current record will be copied the specified number of times and the Navigator will show them with a numbered "Copy" tag on each one.

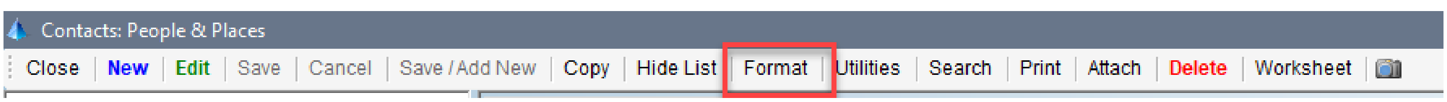
If this is a Parent Record, you'll also be asked if you want to copy the associated Child records to the new copies.

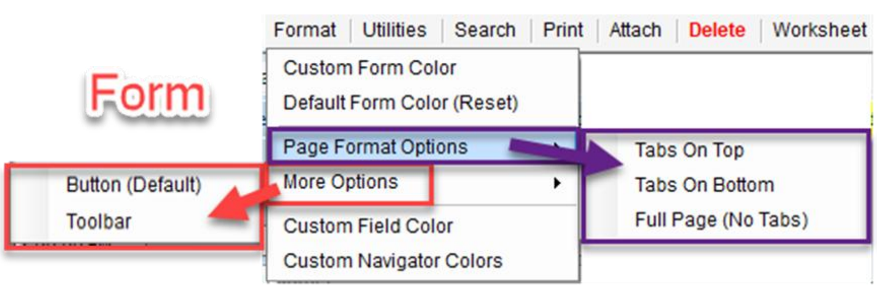
Hide List / Show List (Toggle)



This hides the Navigator on the left and changes to say **Show List**. Click **Show List** to show the Navigator again.

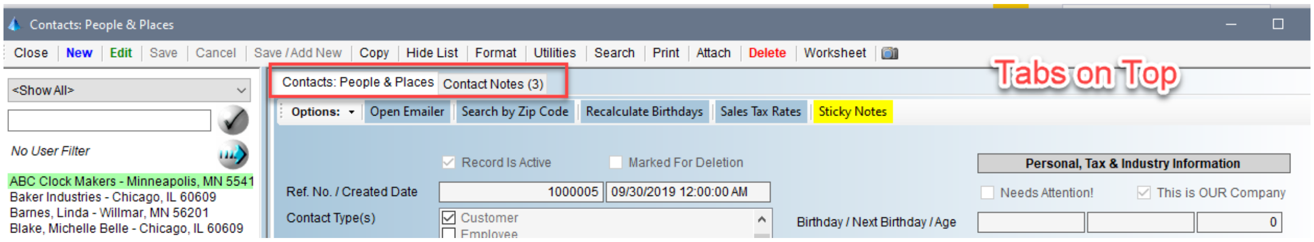
Format



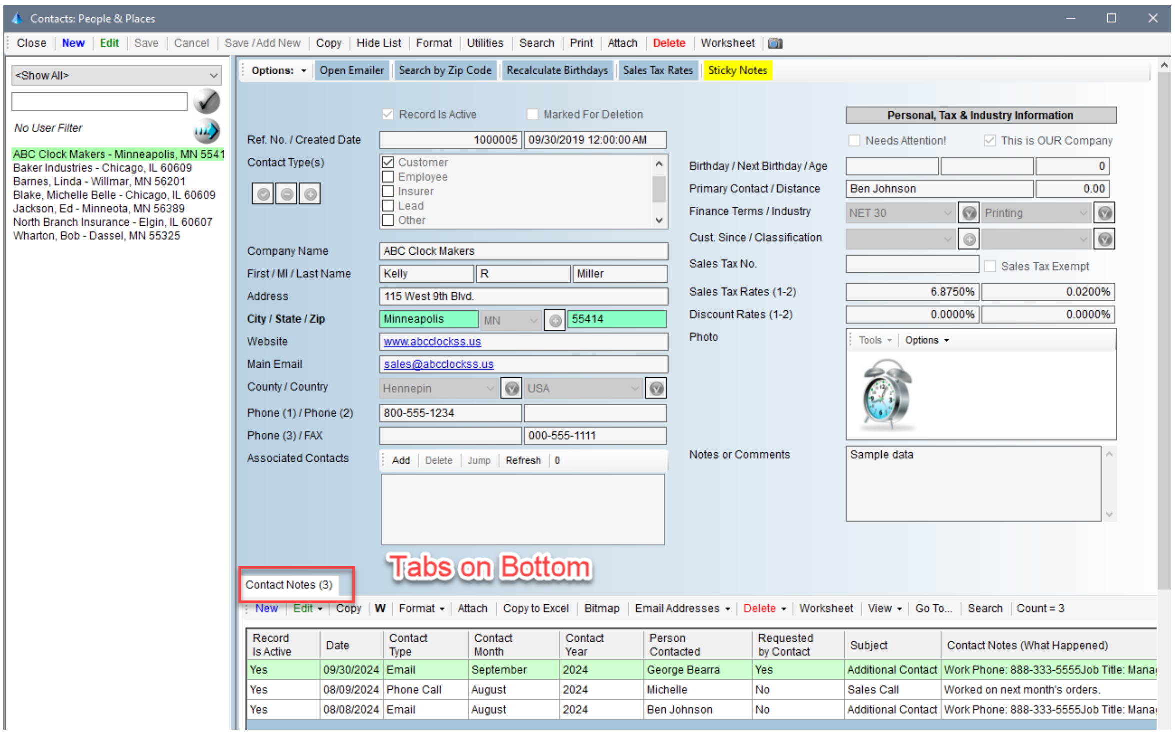


This menu has options to let you override the color selections from Preferences. The **Custom Form Color** will let you set a different color for this form, and the **Default Form Color (Reset)** option restores the color set in Preferences.

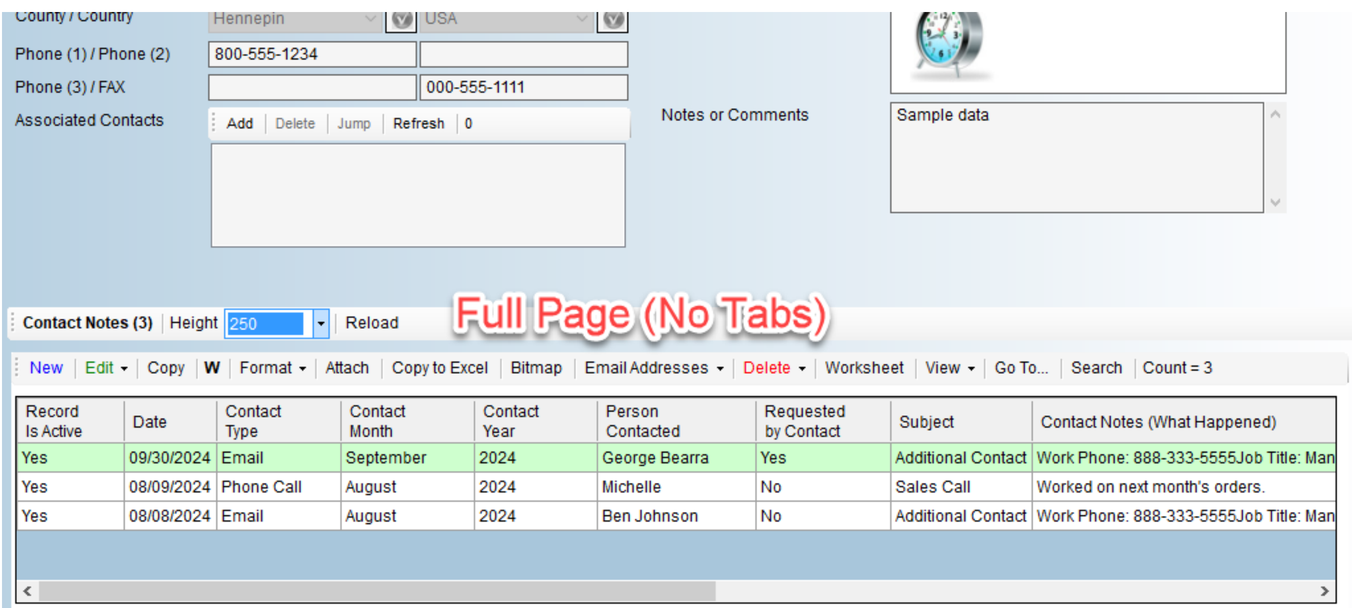
If the form is for a **Parent Table**, the **Page Format Options** menu item will be available so you can set WHERE you want the tabs with the child worksheets displayed.



The default is **Tabs on Top**, which means the Parent form will be on the first tab, and each child table will be on the subsequent tabs. All tabs will be on the top of the page.



Tabs on Bottom will put the Tabbed section under the Parent form, and the form will scroll to allow you to see a full screen of child worksheets.

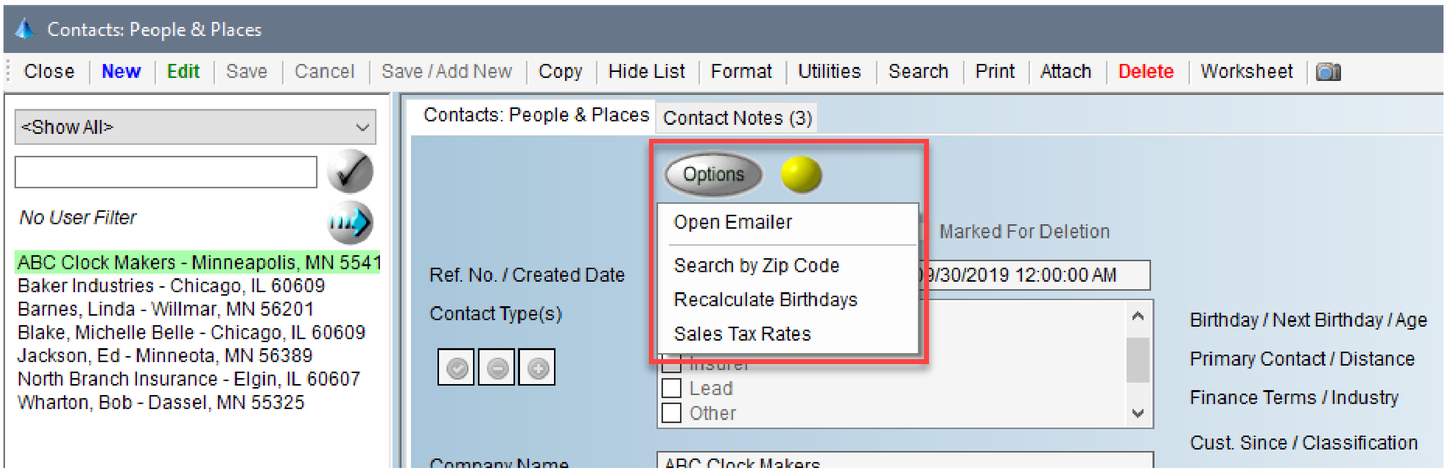


Full Page (No Tabs) also puts the child worksheets on the bottom of the Parent form, but stacked down the page. You can set the height of each child's worksheet individually to show or hide as many rows on each one as you like. Each child worksheet will adjust "up" the page when the worksheet above gets shorter, or "down" the page if you make a worksheet taller.

NOTE: When you change this option, the form will close and reopen to show the selected format.

If the form has Custom Options the **More Options** menu item will be available. This lets you decide how to access the custom options: From an **Options** button on the form, with a drop-down menu, or from an **Options** toolbar at the top of the Parent form.

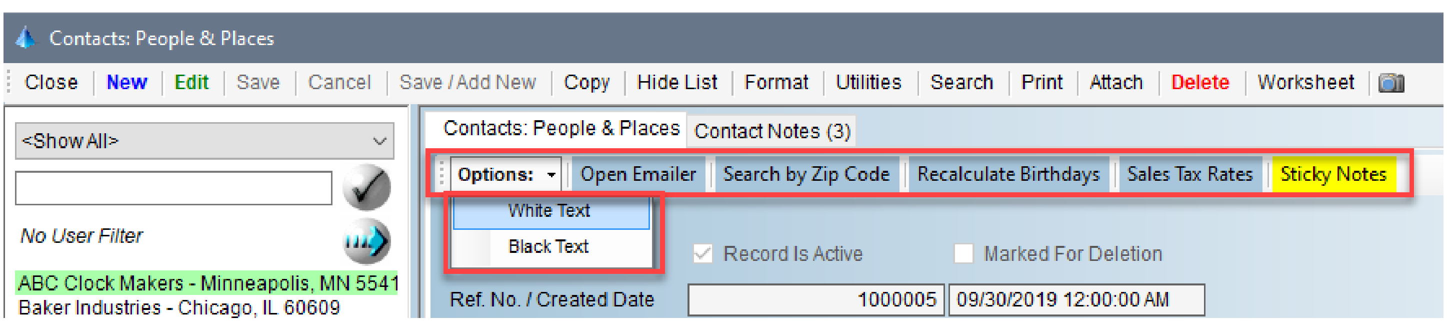
The **Options** button with drop-down menu (if form uses **Sticky Notes**, you'll see the yellow button beside it):



The example above is from the **Customers & Contacts** form, which has the custom features you see in the list above. NOT ALL forms have custom options.

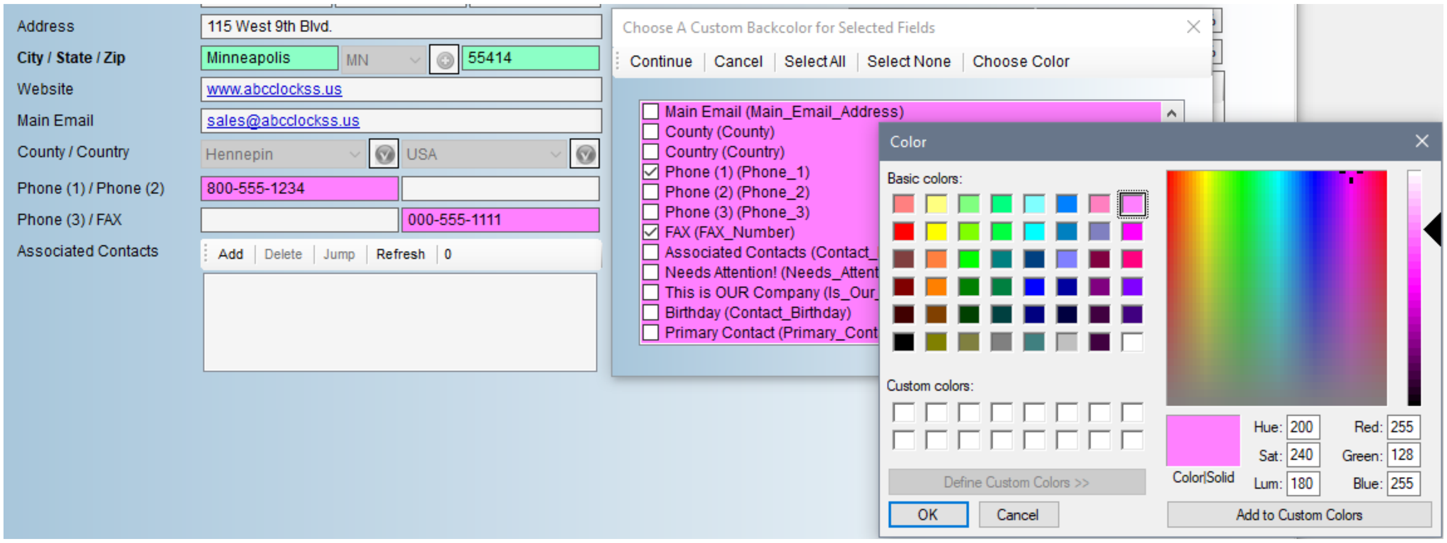
The **Options Toolbar**, with each utility on the toolbar, including Sticky Notes (if available). The drop-down list on the **Options** button lets you change the text color on the toolbar buttons to black or white, depending on what is easier to read based on your form color.

NOTE: When you change this option, the form will close and reopen to show the selected format.

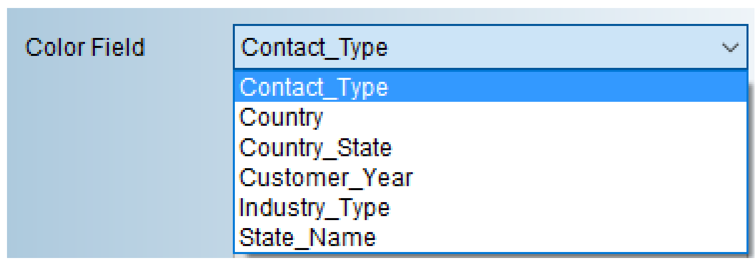


Custom Field Color – This lets you set the background color on one or more fields on the form to draw your attention to those fields when you open the form.

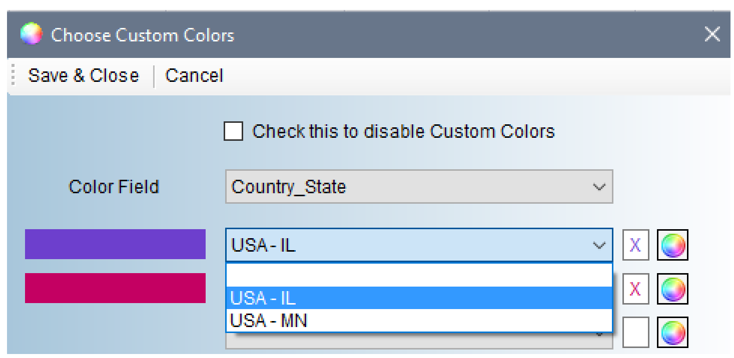
For example, If you wanted to highlight the Phone and FAX fields, you'd check those field names in the list, then click the **Choose Color** button on the toolbar to select the color. Click **OK** to return to the list, which then shows you the color. If the text in the list is not easy to read (the color is too dark), change the color until it appears as you wish. Click **Continue** to apply the setting. You will need to close and reopen the form to see the new format.



Custom Navigator Colors – Use this option to color the list of records in the Navigator based on a field value. For example, in our **Customers & Contact** table, we have the option to color by these fields.



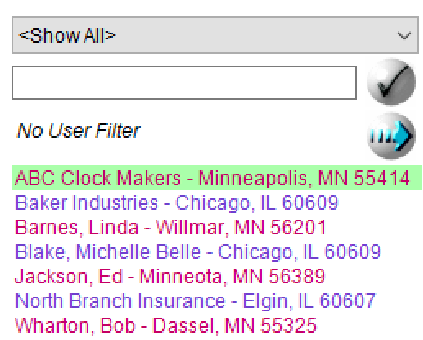
Just for an example, we'll choose the **Country_State** field, which is a calculated field that concatenates the Country and State fields on each record.



There are 15 drop-down lists on the Custom Colors dialog. Based on the number of unique values in the selected **Color Field**, that same number of lists will be filled with those values. Select a different value in each list, then click the Color button on the right to choose the color of the text.

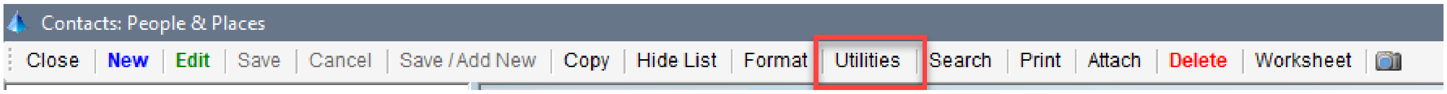
You don't have to use all of the values; typically you would only want to highlight certain items to make it easier to find them in the Navigator. There's no reason why you cannot use all of the options, however, so color away!

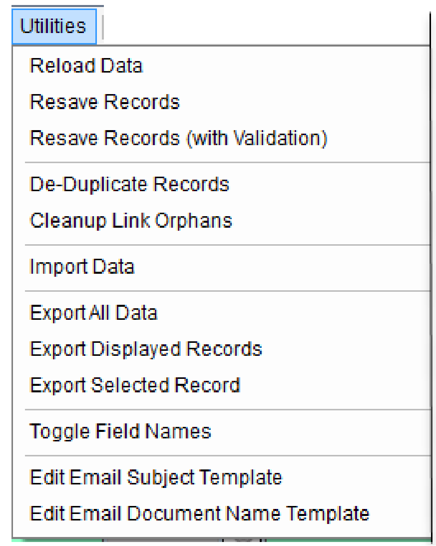
In our example above, the results looks like this >>



IMPORTANT! For all of these formatting options, they will be applied each time the form is opened. However, you can change them at any time.

Utilities

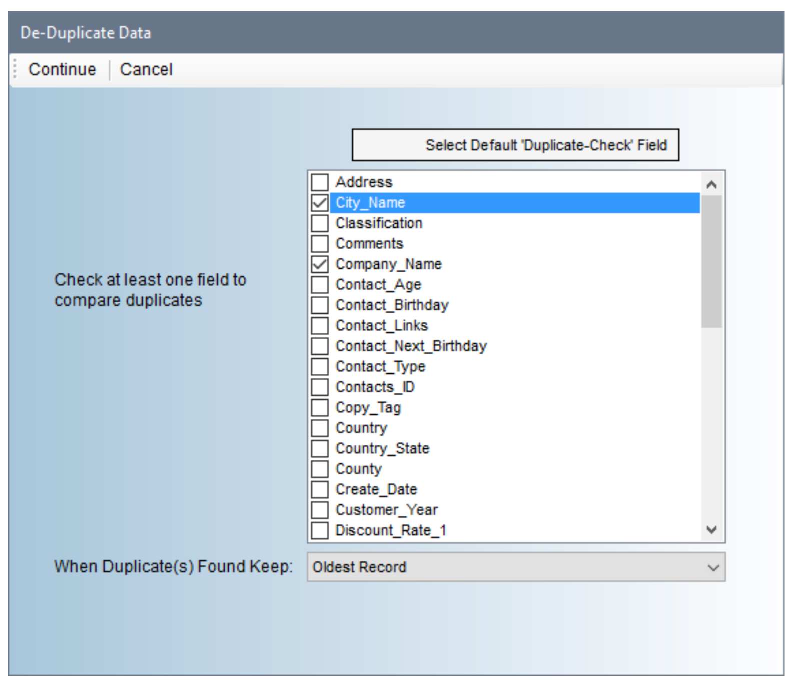




This menu has functions to update or manipulate the data in the current table.

Reload Data – Clears the Navigator and re-reads the data from the database. This action is the same as when you close and reopen the form.

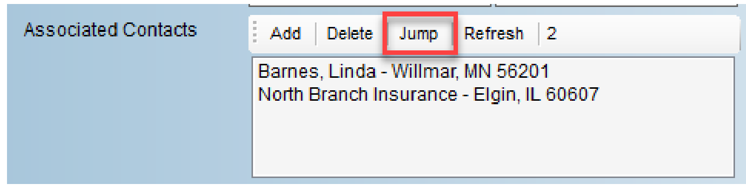
Resave Records / Resave Records with Validation – See ** below. When you click on this option, all of the records are edited and saved, just as if you edited each one individually, made changes and saved it using the **Edit** and **Save** buttons on the toolbar. This can be useful after importing records from another source, and you want to be sure all of the calculated fields on each record has been updated. For example, the value you see in the Navigator for each record is a calculated field, which concatenates several fields on each record that would make the record unique. The option **with Validation**, applies any custom actions that may be part of updating other tables when a record is changed. If you're unsure, use the **with Validation** option.



De-Duplicate Records – See ** below. Each table is designe to NOT allow user to add duplicate records based on the combination of field values that create the Navigator list. However, following an import, you might see duplicates based on other fields. This utility will prompt you to choose which fields to de-duplicate on, and then which of the duplicate records to keep (oldest or newest).

Click **Continue** to run the utility. A message box will tell you the results.

Cleanup Link Orphans – this utility is only available if the form has control that allows you to link two or more records together. You can then double-click on an item on one record, which jumps you to that linked record. This type of control serves two purposes: 1) defines an association between two or more records, and 2) provides a short-cut "jump" to get from one to another. If you delete a bunch of records, sometimes the "cleanup" leaves orphaned links in the table. This utility finds and permanently deletes them.

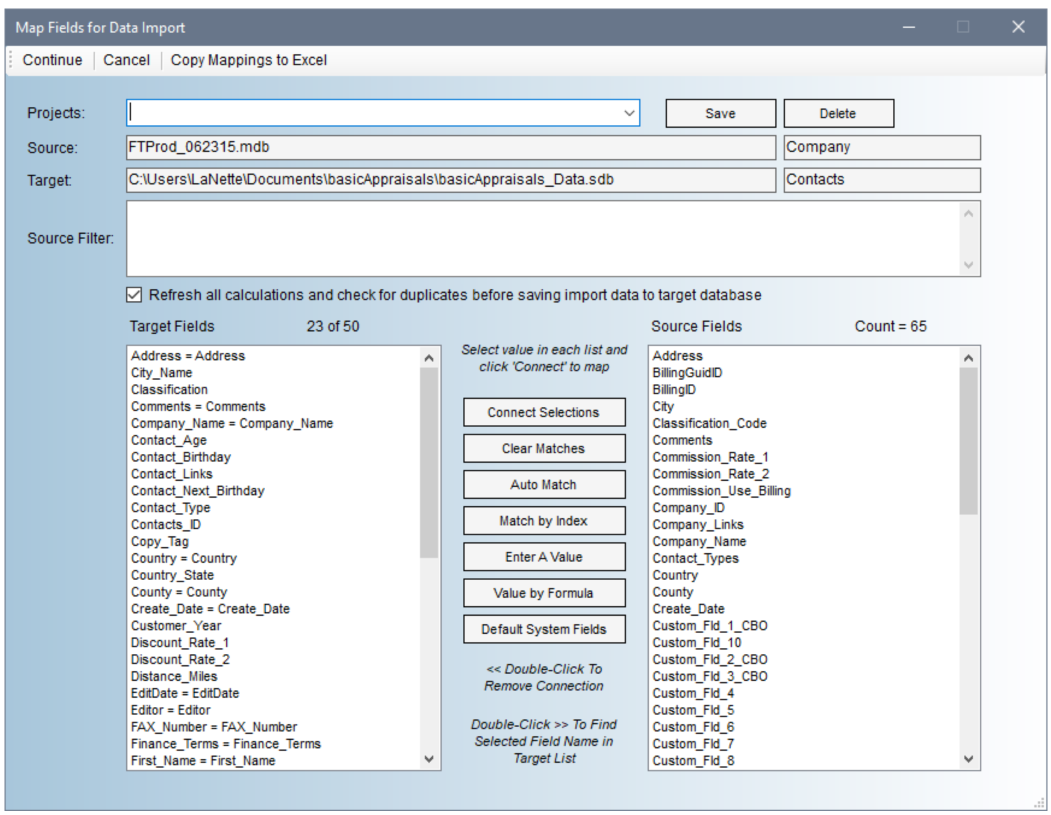


Import Data – NOTE: this utility requires some knowledge of data types and how the source data is formatted. If you feel this is beyond your skills, contact support for assistance.

This utility supports importing data from another source. For example, if you have customer information in another system, and you can export it to one of the import formats (below), the Import dialog will let you map the source fields to the fields in this table, then import and validate the data. This utility will read and import data from:

- Access Database (.mdb / .accdb)
- Comma-Separated Values (.csv) file
- Excel Workbook (any version)
- SQL Database
- SQL Express
- SQLite

Choose the source type and click **Continue**. Based on the source type, you'll be prompted to select a file (Access, CSV, Excel or SQLite), or enter the SQL Server & database names and credentials.



The source data is read, and the fields from both the source and the target (your table) are displayed on the Import dialog.

If a field name in the source matches the field name in the current table, it's automatically mapped (see the **Address = Address** text in the first list below). All other fields can be matched manually by clicking on the field in each list and then click **Connect Selections**.

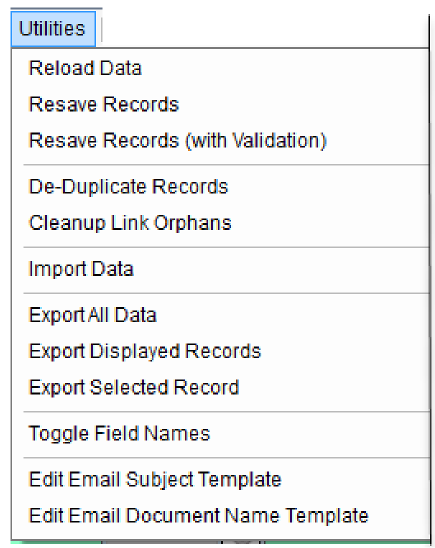
Each Phase25 Software application has six "system fields" (KeyID, Editor, EditDate, IsActive, IsDeleted, IsEdited). The calculations for these are "mapped" by default, but you can always click the **Default System Fields** button to remap those if they get disconnect.

IMPORTANT: When entering records on a form, the system will not allow you to enter a value that is the incorrect data type for that field. For example, you cannot enter plaini text in a date or number field. Your entry MUST be a date or number.

When importing data, you need to know what type of data each field is in both the source and the current table, and map the fields accordingly.

If you need to import only a portion of the data from the source, and you understand how to write a simple SQL query, you can enter it in the **Source Filter** field. An example might be "IsDeleted = 'No'" or "IsActive = 'Yes'". You would need to know your data and how to construct a query correctly to use this feature.

Click **Continue** to begin the import. A count of how many records will be displayed and you can choose to continue or cancel at that point.

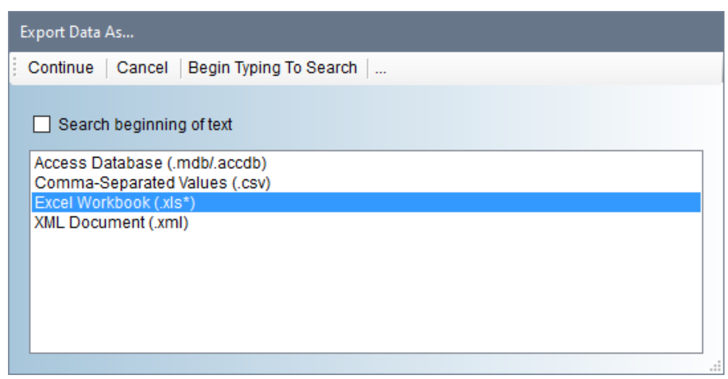


During the import you'll see a progress bar at the bottom of your screen with a "count-down" of where the utility is. When the utility is done, your form will reload with the new data displayed in the Navigator.

Exporting Data – The next three utilities support exporting data from the system into another format (Access database, Comma-separated values (.csv), Excel workbook or as an .XML document). Choose which option to use based on what you want to export. The **Export Displayed Records** option will export only those records displayed in the Navigator (see ** below).

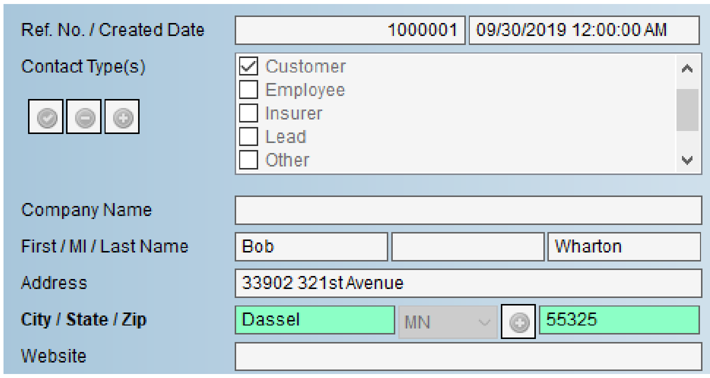
The list of exported file options is displayed (below). Select the format and click **Continue** to export the data.

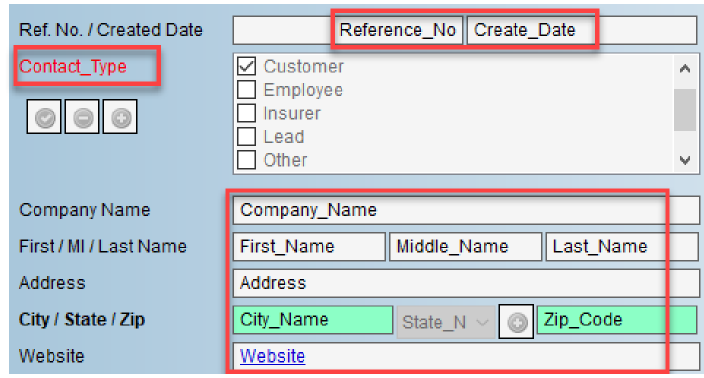
*** These utilities run on all of the records displayed in the Navigator. See the topic on Filtering the Navigator to view records based on selected field values.*



Toggle Field Names – Each form has a label in front of each field which describes what the data you're entering should be. For example, on the **Customers & Contacts** form, the field labels on the "names" row are abbreviated (First / MI / Last Name). If you're importing data (above), you'll need the actual name of the field in the table to map the data source into. This feature provides a quick and easy way to see the actual field name.

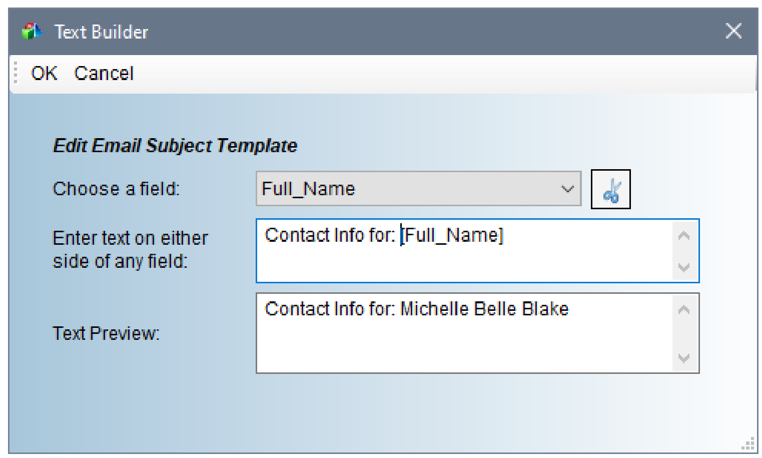
When you click on it, each field on form hides the current record's field value and shows the actual field name.

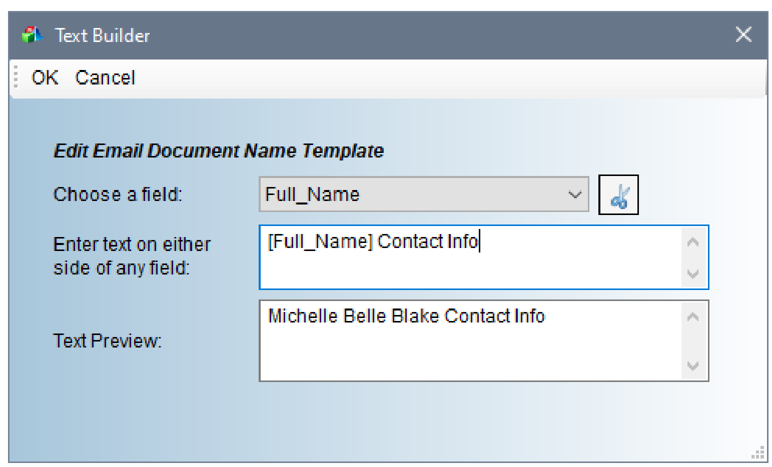




Some control types, like the checked list above, cannot replace its value, so the field name will be displayed in red text in place of the label. To restore the record, click this option again, or click on another record to load it in the form.

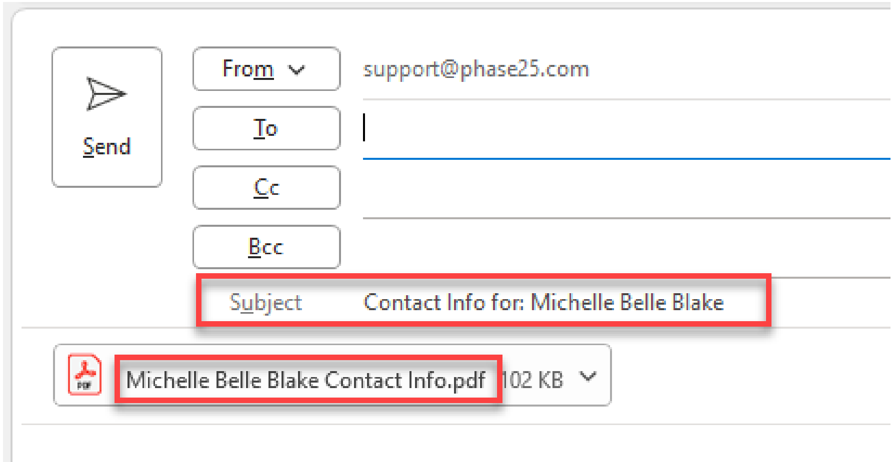
Edit Email Subject & Document Name Templates – This applies to reports that you view in the Print Preview window. One of options on that window is the ability to save the report in PDF format, then automatically attach it into a new Outlook message which is then displayed on your screen for you to complete (if Outlook is used/enabled in Preferences). If these templates are defined, the field names in it will be replaced with the field values of the record being printed.





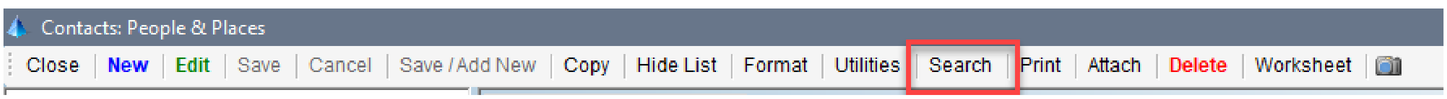
Using our **Customer & Contacts** data, you could select the field name **Full_Name** and then add some text around it (**Contact Info:)**. The **Text Preview** shows what the subject on an email would look like for the current record, and how the file attachment would be named.

Here's what the report, attached in an Outlook message would look like.



Of course you can manually enter the Subject and Document name when prompted on the Print Preview window, but if you routinely email reports or documents in the same format, this shortcut makes it easy to be consistant.

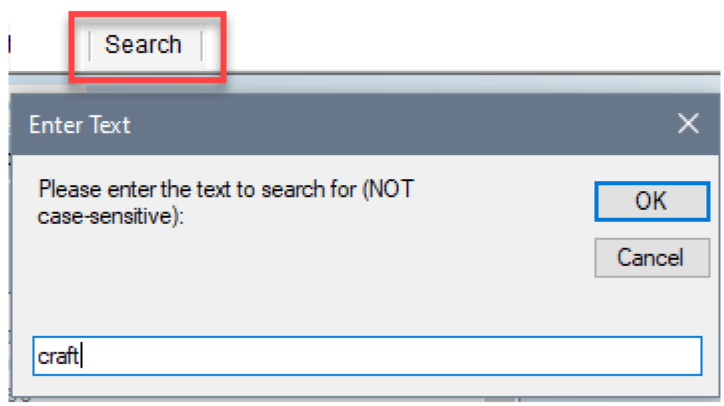
Search



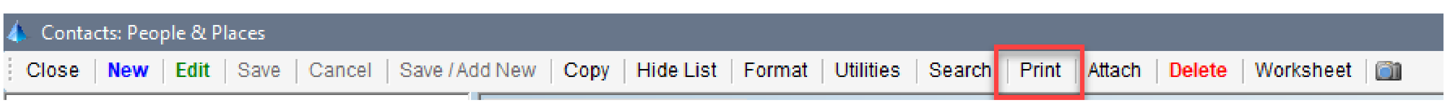
This utility searches every field in the table for the text you enter in the prompt. Any records that contain that text in any field will be displayed in the Navigator.

To clear the search results, just choose **Show All** from the Navigator filter menu.

All text searches are NOT case-sensitive.

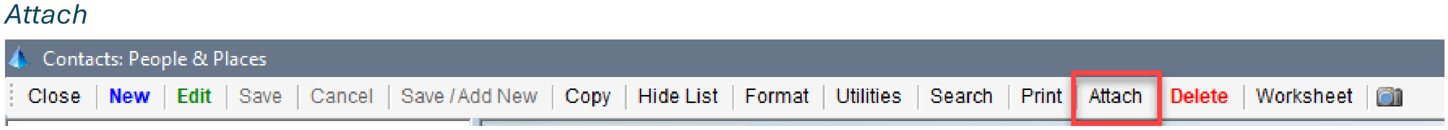


Print



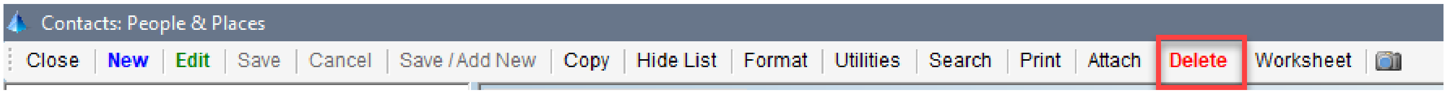
This opens the Print Dialog, that includes printing reports, calendars and charts and creating **Quick Views**, which are simple queries to view data in a worksheet. See the **Phase25 Printing Guide** for details.

Attach



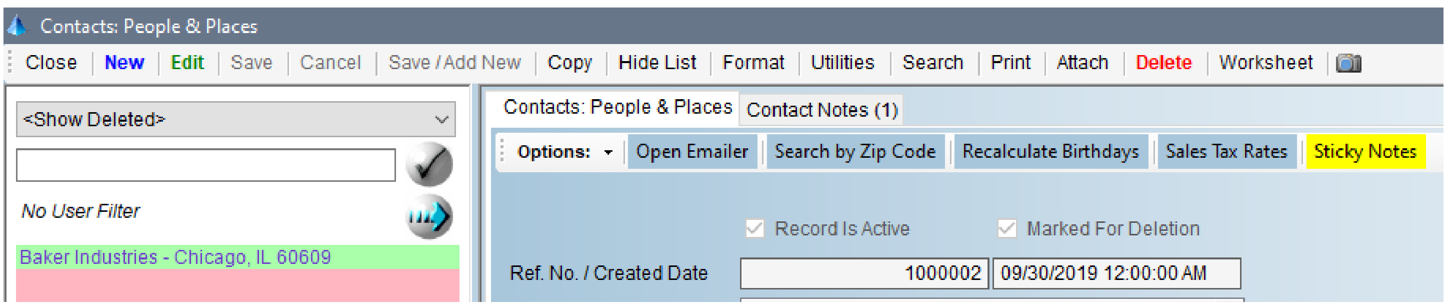
This opens the Attachments page which will show all attachments that belong to the current record. If you have files outside of the application that should be associated to a particular record, this is a good way to keep them "attached" to that record. See the File Attachments section in this guide for details.

Delete

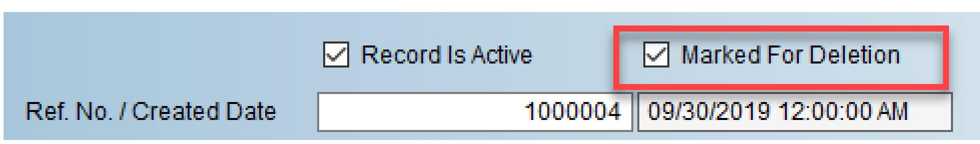


Note that deleting data from either the form or worksheet only MARKS the record to be deleted. This removes the record from being used in reports or drop-down lists, but doesn't physically remove it from the database. Click the **Delete** button to mark the current record as deleted, which will remove it from the Navigator.

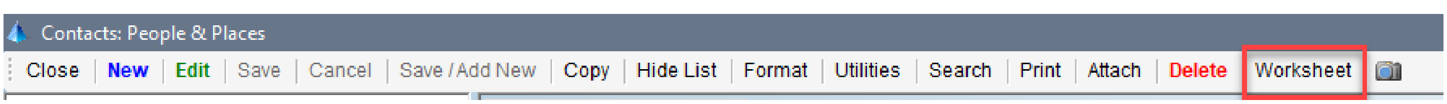
If you have marked records for deleting, you can see them by selecting the **<Show Deleted>** option from the Naviagator drop-down list. All records marked for deletion are displayed and the Navigator is pink to remind you you're viewing deleted records. To permanently delete a record, select it in the Navigator and click the **Delete** button on the toolbar. A prompt will warn you that this is already "marked for deletion" and let you cancel if you want.



You can **Undelete** a record in the this view by double-clicking on a row and unchecking the **Marked for Deletion** checkbox at the top of the form. Save the record and it will return to the Navigator when you click **<Show All>** again.

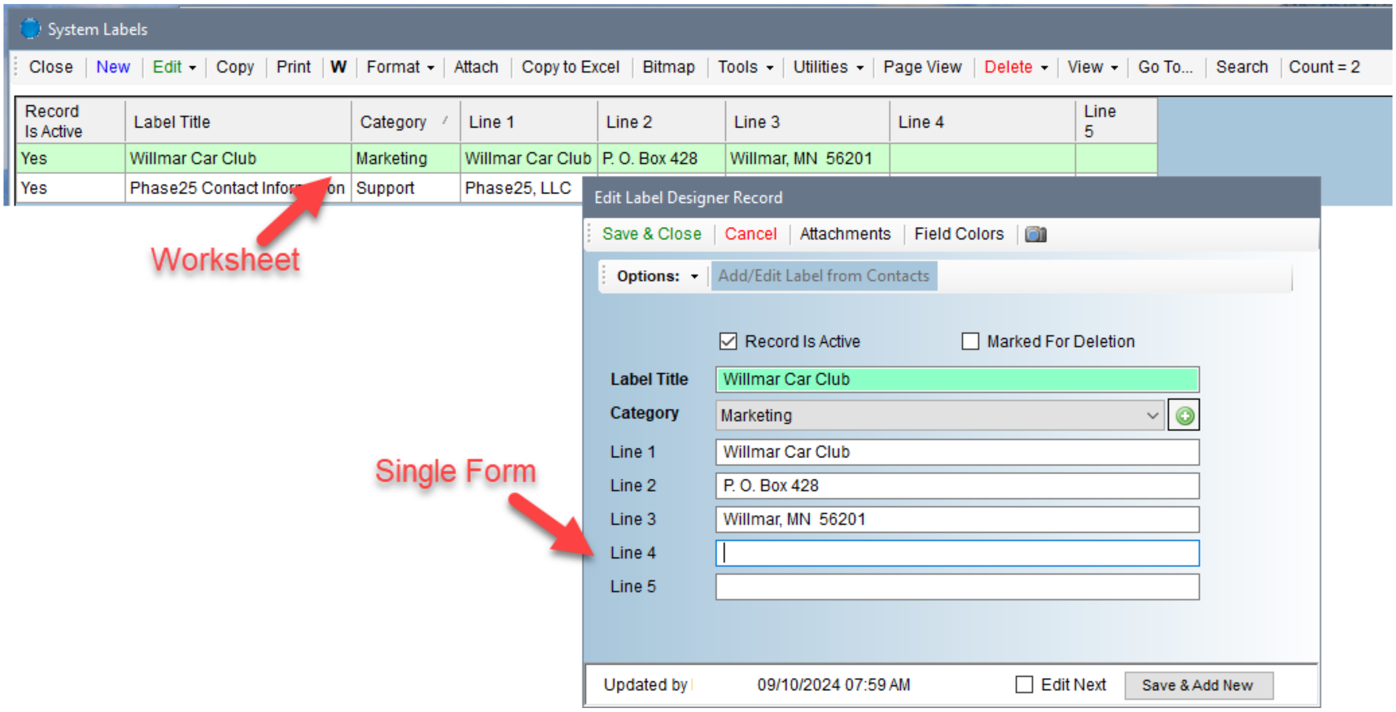


Worksheet



Worksheets

Each Form displays data one record at a time. Another way to view the data in a table is to use the **Worksheet** button on the Form's toolbar. This displays the data much like a spreadsheet, in rows and columns. Double-click in any row to open a single **Form**.



Selecting Rows in the Worksheet

Some of the features in the next sections work on a single row in the Worksheet, or on multiple rows. You can select more than one row by clicking on the first row, then holding down the **Shift** key and selecting the last row. All rows in between will also be selected. You can also select all contiguous rows by dragging across the start row to the end row.

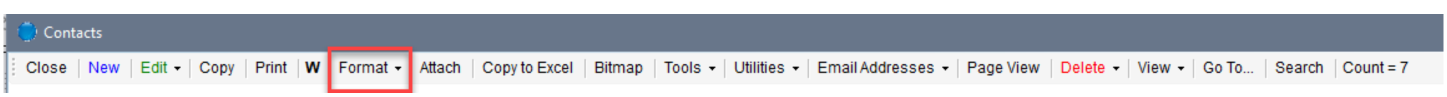
To select rows that are not in order (non-contigous), hold down a **Control** key and click on each row.

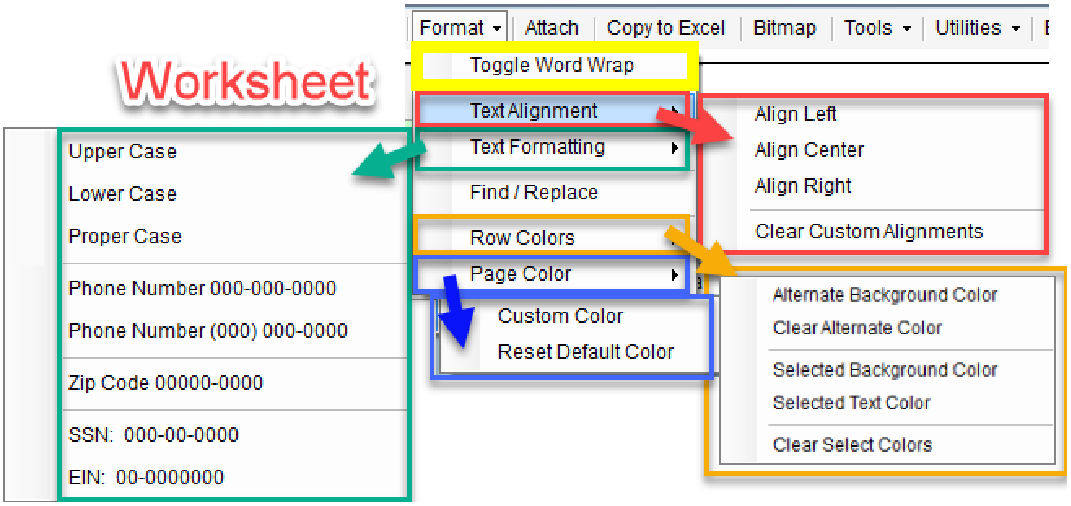
These are standard Windows selection options.

Worksheet Toolbar

Many of the options on the Worksheet Toolbar are similar to the Form toolbar. Additional features are discussed below.

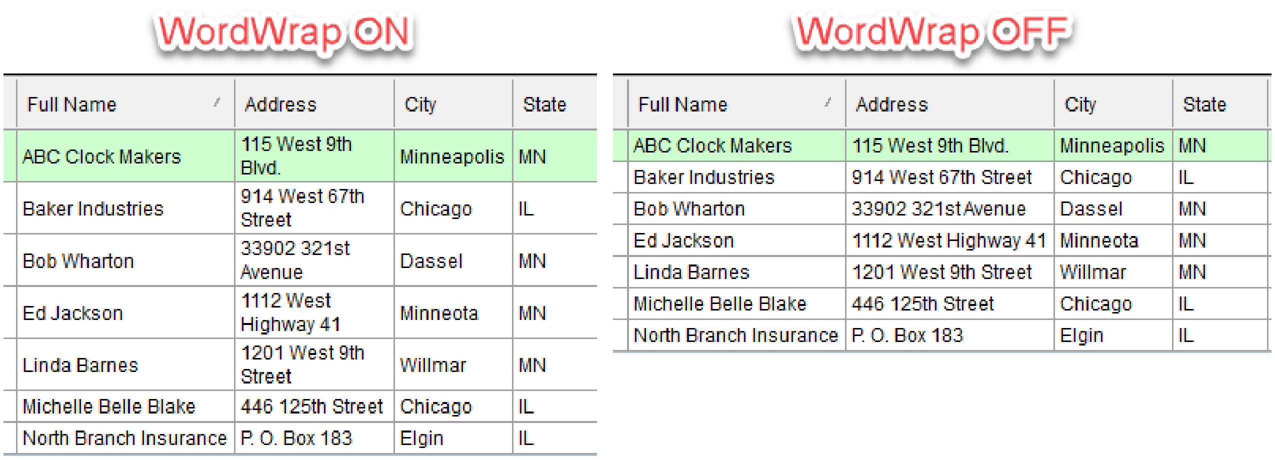
Format





Toggle Word Wrap

By default the worksheets show their data in columns WITHOUT word-wrapping (wrapping the text while expanding the row height so all text is visible). You can turn this option on (and then off again) by clicking on **Toggle Word Wrap**. When Word Wrap is on, any functions you use on the worksheet will appear to slow down as each row has to resize independently.



WordWrap ON

Full Name	Address	City	State
ABC Clock Makers	115 West 9th Blvd.	Minneapolis	MN
Baker Industries	914 West 67th Street	Chicago	IL
Bob Wharton	33902 321st Avenue	Dassel	MN
Ed Jackson	1112 West Highway 41	Minneota	MN
Linda Barnes	1201 West 9th Street	Willmar	MN
Michelle Belle Blake	446 125th Street	Chicago	IL
North Branch Insurance	P. O. Box 183	Elgin	IL

WordWrap OFF

Full Name	Address	City	State
ABC Clock Makers	115 West 9th Blvd.	Minneapolis	MN
Baker Industries	914 West 67th Street	Chicago	IL
Bob Wharton	33902 321st Avenue	Dassel	MN
Ed Jackson	1112 West Highway 41	Minneota	MN
Linda Barnes	1201 West 9th Street	Willmar	MN
Michelle Belle Blake	446 125th Street	Chicago	IL
North Branch Insurance	P. O. Box 183	Elgin	IL

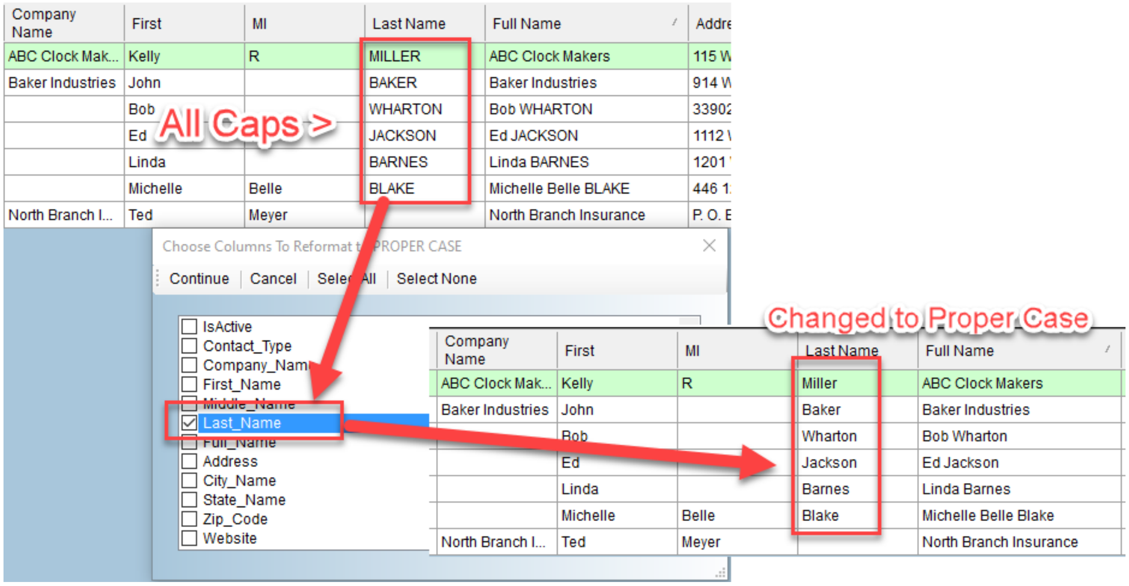
NOTE: The **W** button in front of the **Format** button on the toolbar also toggles Word Wrap on or off.

Text Alignment & Text Formatting

The Text Alignment feature works on the last selected column in the Worksheet. So before you choose one of the alignment options, be sure to click in the column you want to apply the changes to. The Text Alignment feature merely saves your choice and applies it each time you open the worksheet. NO DATA IS CHANGED.

The Text Formatting option EDITS the records displayed in the worksheet when you apply the change. For example, if you have a column of names where they're entere in all-caps, and you want them to be in Proper Case (first letter is capitalized), choosing "Proper Case" would update all non-proper-cased values in that column, and the changes would be saved just as if you had individually edited each record.

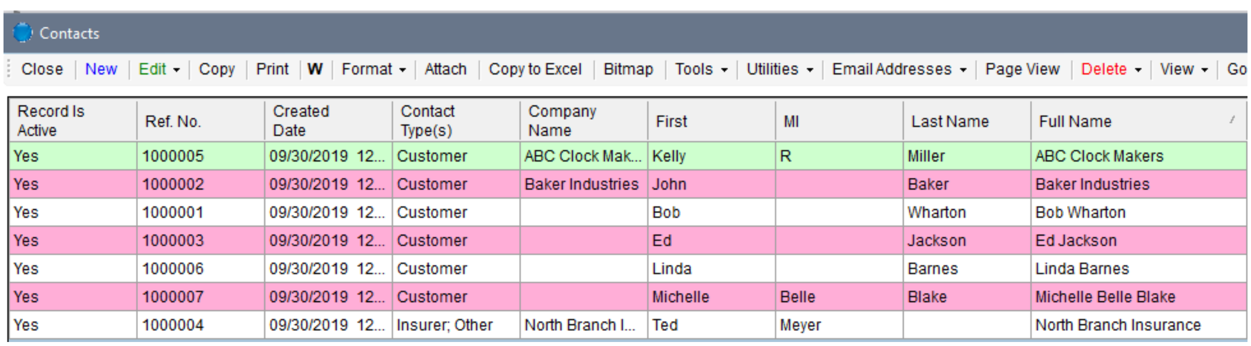
This feature prompts you to select which field or fields to update. See the image before for an example.



NOTE: Choosing the custom formats for phone numbers, zip codes, tax ID numbers (SSN / EIN) requires that the data in the selected columns “fits” those formats. For example, if you have names or other text in a Phone number field, the format will not be applied.

Row Colors

You can change the default all-white rows to display with alternating colors (white and ?) by using the **Row Colors** options. These choices are applied each time you open this worksheet. Click the **Alternate Background Color** option and select the color, as in the example below (pink):



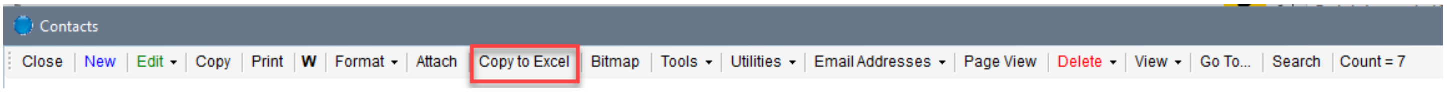
Click the **Clear Alternate Color** option to restore the default white background color for all rows.

The **Selected Background Color** option overrides the color you set in **Preferences** for this worksheet only. You can also change the Text color of a selected row here. Click the **Clear Select Colors** to restore the default colors for both.

Page Colors

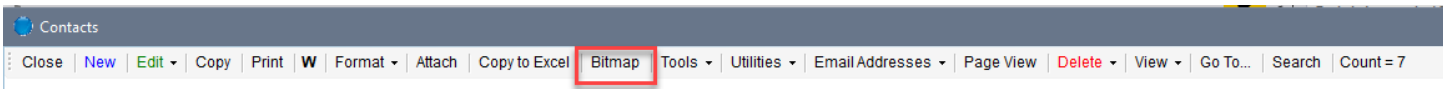
The **Custom Color** option overrides the page background color you selected in **Preferences.** Click the **Reset Default Color** to restore the color choice from **Preferences**.

Copy to Excel



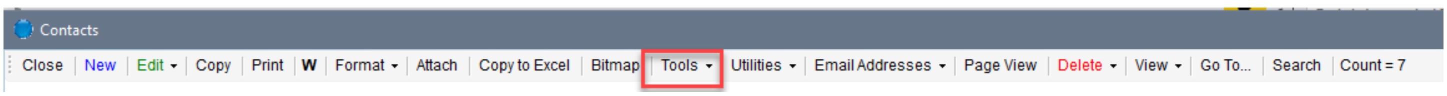
If you have Microsoft Excel on your computer, this option copies the worksheet just as it appears on the screen and creates a new Excel workbook, pasting the data into the first worksheet. This is a quick way to copy the data to Excel if you need to share it with another application or users that do not have this application.

Bitmap



This utility takes a screen print (snip) of the VISIBLE part of the worksheet and opens it in your default graphics program (usually Paint).

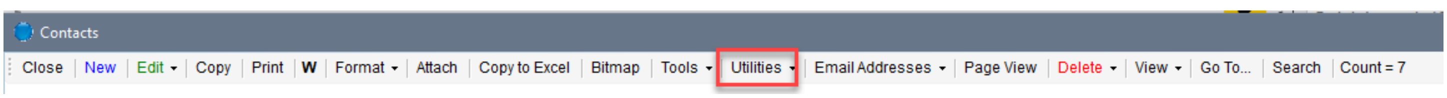
Tools



The **Tools** option will not appear on all worksheets, only those which have custom features. Typically, if a form has an **Options** button or toolbar, the same menu options will appear under the **Tools** button on this toolbar.

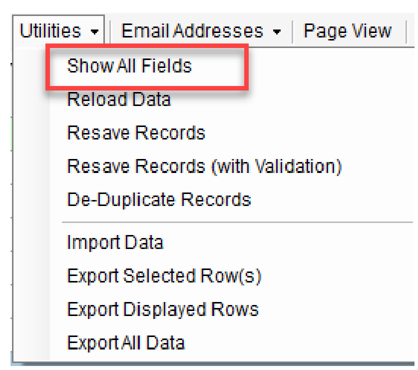
Utilities

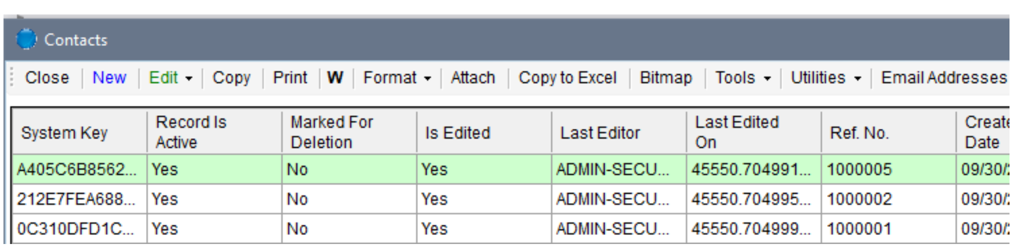
The Utilities on the Worksheet Toolbar has one additional feature not on the Forms toolbar:



Show All Fields

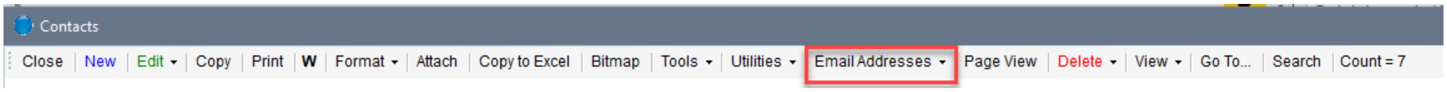
In every table there are hidden fields that are **System Fields** (used to identify records and statuses... deleted, active, etc.) and calculated fields, which are needed for each record. By default, these fields are not displayed in the worksheet. Click this option to show the fields.

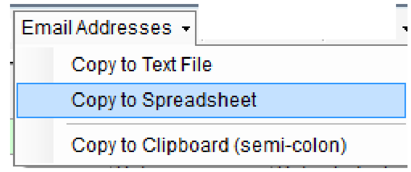




To restore the default view, the menu option changes to **Restore Hidden Columns**, which again hides these fields on the worksheet.

Email Addresses

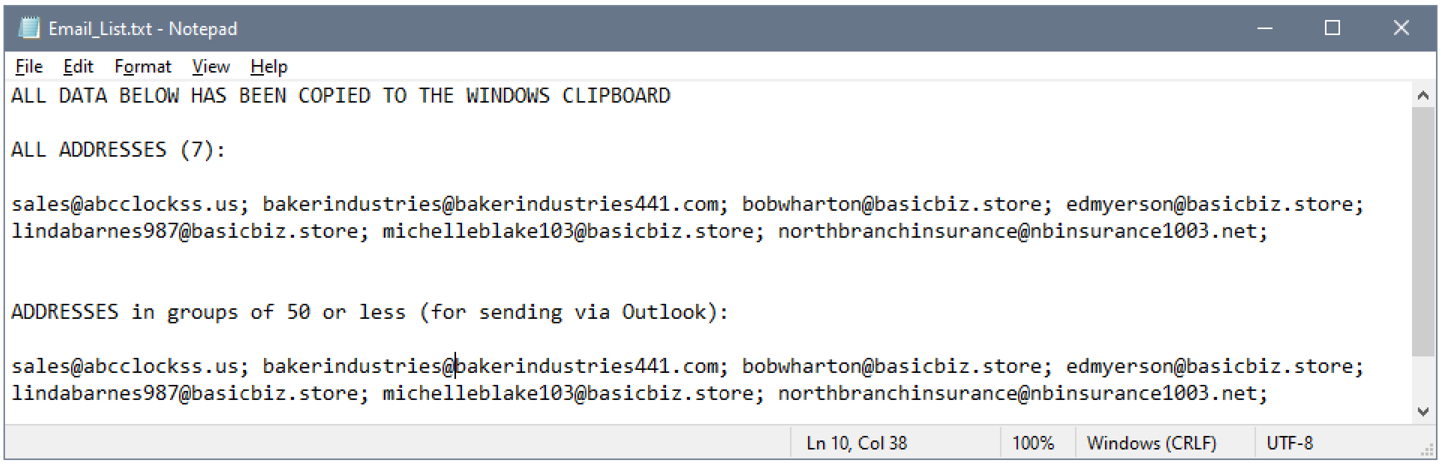




Not every worksheet will have this option, but if the table you're viewing has a field that stores email addresses, this offers a quick way to copy AND deduplicate email addresses.

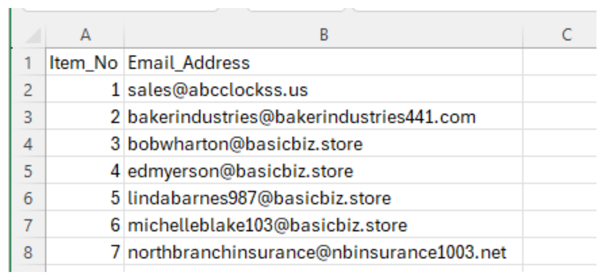
Copy to Text File

This creates a Notepad file and displays several options for using the text from the email address list:



Copy to Spreadsheet

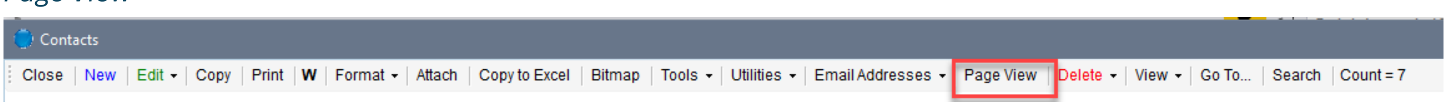
If you have Excel on your computer, this option creates a new Excel workbook and copies the email addresses to a single column. The workbook will be opened on your desktop and you can save or distribute it as needed.



Copy to Clipboard

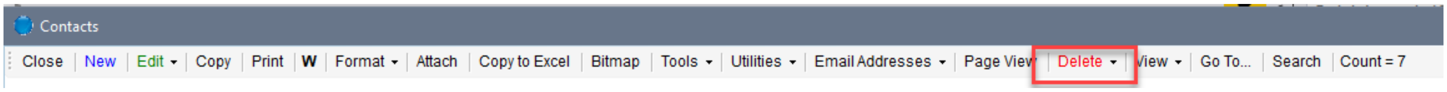
This copies the email addresses to the Windows clipboard, separated by a semi-colon (the same format as the first group of addresses in the **Text File/Notepad** option.

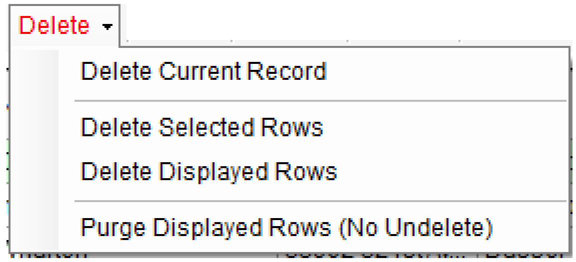
Page View



You clicked the **Worksheet** button the Form's toolbar to open the Worksheet. Click this option to close the worksheet and reopen the Form (page).

Delete





The **Delete** button has choices for deleting data from the worksheet. Note that deleting data from either the form or worksheet only MARKS the record to be deleted. This removes the record from being used in reports or drop-down lists, but doesn't physically remove it from the database.

See the **View / View Deleted Records** topic below for how to permanently delete data.

Delete Current Record

This marks the first selected row in the worksheet as 'Deleted' and removes it from the worksheet.

Delete Selected Rows

This marks ALL selected rows in the worksheet as 'Deleted' and removes them from the worksheet.

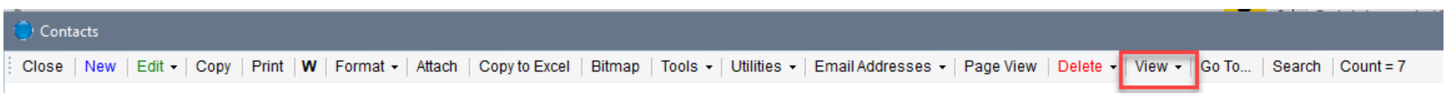
Delete Displayed Rows

This marks ALL rows currently displayed in the worksheet as 'Deleted' and removes them from the worksheet.

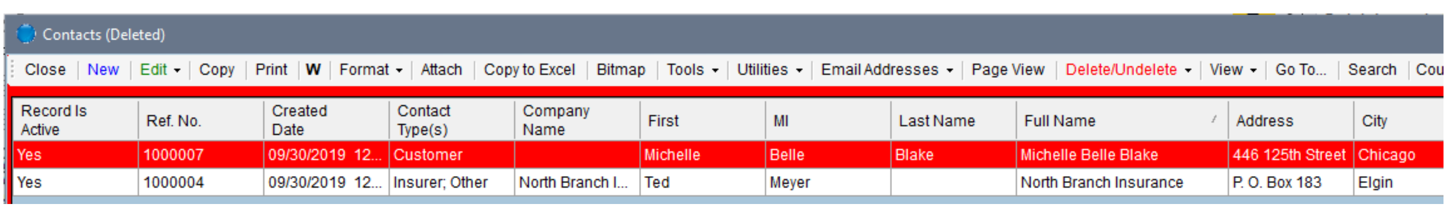
Purge Displayed Rows (No Undelete)

This actually (physically) deletes the displayed rows WITHOUT the option to "Undelete" later.

View (Current / Deleted Records)

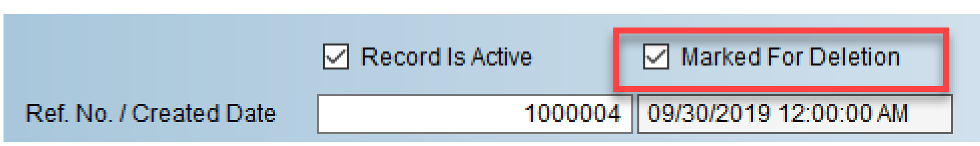


If you have marked records for deleting, you can see them by clicking the **View > Deleted Records**. All records marked for deletion are displayed. Additional options on the **Delete** menu are added where you can select one or more rows in the worksheet and **Undelete** them. When viewing deleted records, a wide red border is added to the worksheet, to remind you you are looking at deleted records.



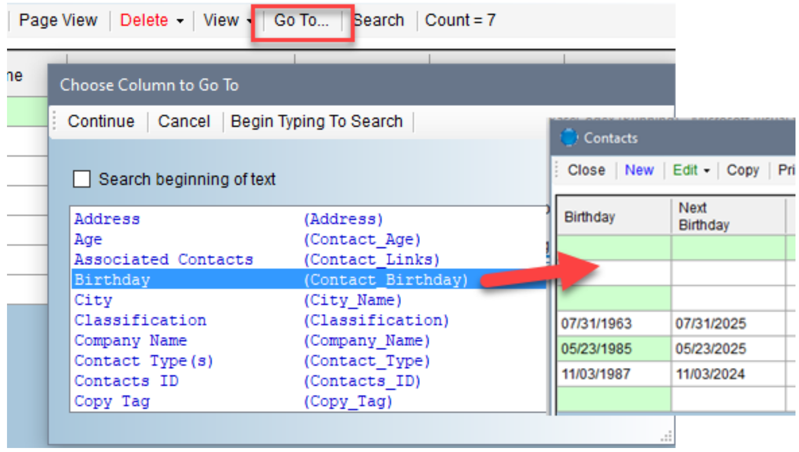
Record Is Active	Ref. No.	Created Date	Contact Type(s)	Company Name	First	MI	Last Name	Full Name	Address	City
Yes	1000007	09/30/2019 12...	Customer		Michelle	Belle	Blake	Michelle Belle Blake	446 125th Street	Chicago
Yes	1000004	09/30/2019 12...	Insurer; Other	North Branch I...	Ted	Meyer		North Branch Insurance	P. O. Box 183	Elgin

You can also **Undelete** records by double-clicking on a row and unchecked the **Marked for Deletion** checkbox at the top of the form.



Go To...

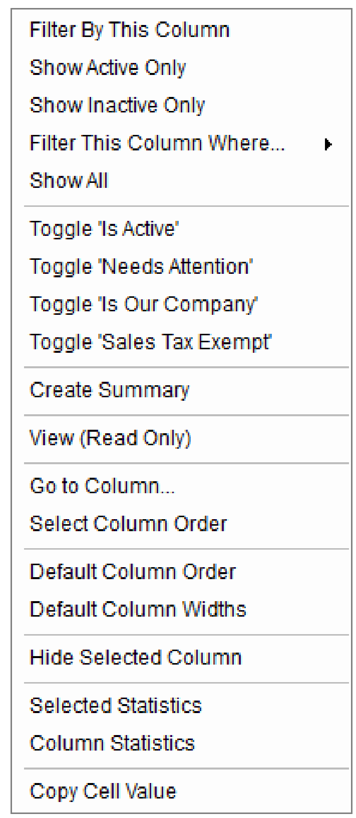
When a Worksheet has a lot of fields it may be difficult to find that column in the Worksheet. Click on **Go To** to display all Labels (which you see on the form) and the actual field names in a list. Click on the field you want to go to, and the worksheet will scroll to that column and highlight it with you selection color.



Row Count

The last item on the Worksheet toolbar shows the number of rows currently displayed in the Worksheet. If you filter the worksheet, this number will change, displaying only the visible rows.

Worksheet Menu



The Worksheet has an additional menu that's available when you right-click anywhere on the worksheet.

The first section of options are used to filter the Worksheet, displaying only the rows you want to see and work with.

Filter By This Column

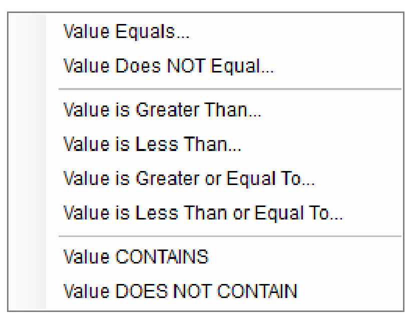
Based on the last column you clicked on, this displays a list of values in that column. Click on any value, and only those rows will be displayed.

Show Active Only / Show Inactive Only

Every record has a checkbox called **Is Active**, which is checked by default (Active). These two options filter the worksheet by the status you selected.

Filter This Column Where...

The submenu at the right >>> shows the options available when you click here. This gives you some built in logic for filtering the worksheet.



Toggle Checkboxes

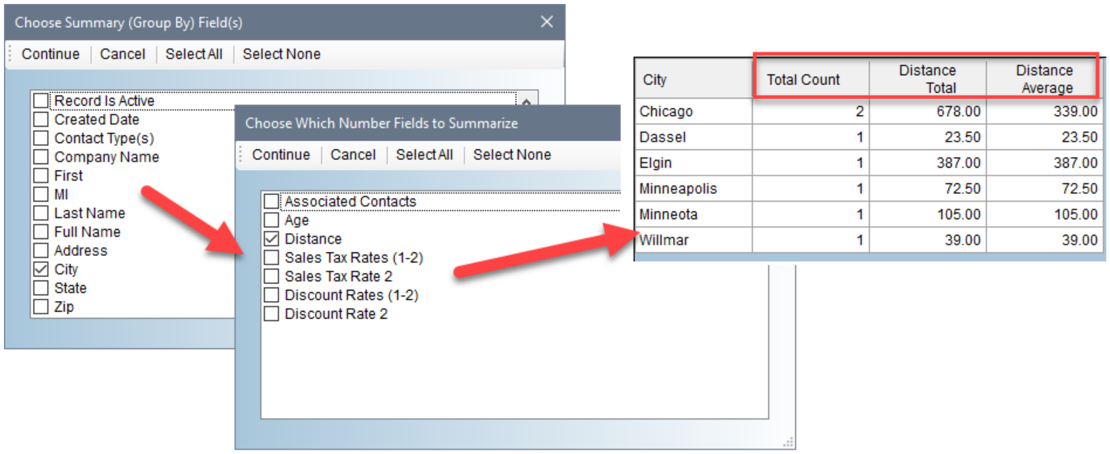
The next section of options may change depending on whether the form has checkboxes. Every field that's displayed as a checkbox has only two values: Yes (checked) and No (unchecked). These utilities will be applied to all selected rows in the Worksheet, and will change the values from Yes to No, or No to Yes, depending on their current value. This is a quick way to edit multiple records at the same time.

Create Summary

This option acts like an Excel pivot table, where you create a summary of the data displayed in the worksheet by grouping the data by one or more fields, then summing, averaging (number fields only) or counting the values.

First, you see a list of fields that you can group by; check at least one of them and click **Continue.** Next you'll be prompted to select the fields to Summarize. You can select more than one field; a set of results for each field will be displayed (Count, SUM, Average). The results are displayed in a new worksheet, with the Total Count, Sum and Average of the number fields.

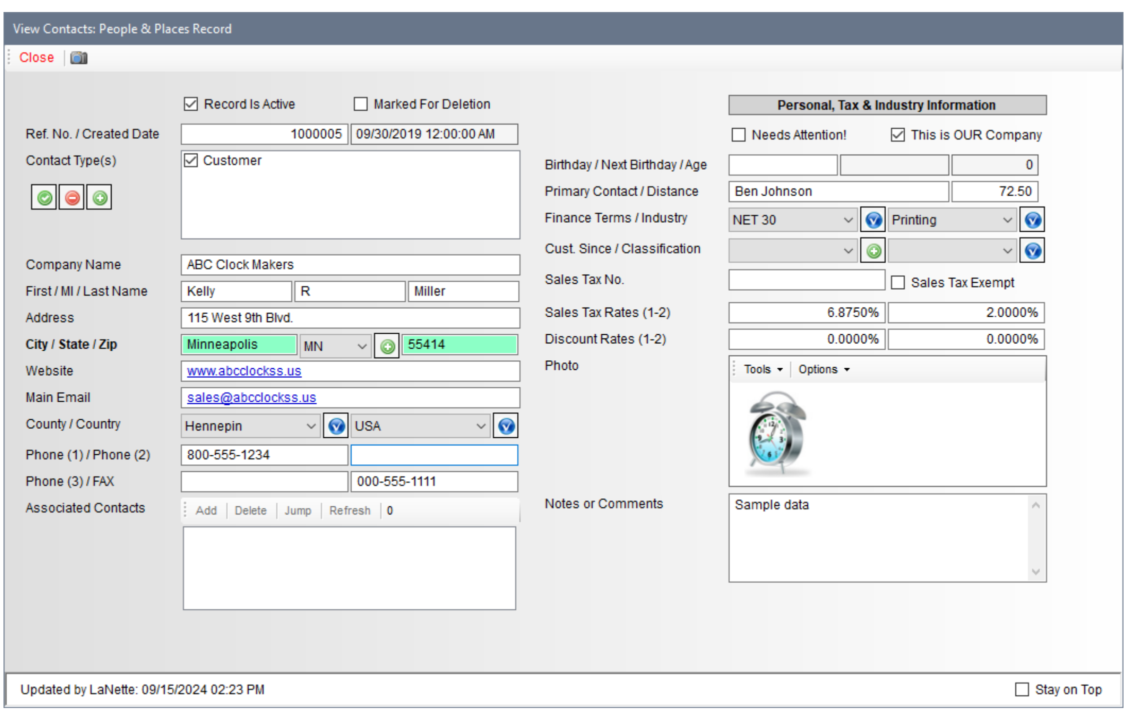
NOTE: If you choose more than one field to Group By, the values from each of the fields will be combined so that the results for each combination are displayed in a single row.



View (Read-Only)

When you double-click on a row in the Worksheet to open a record for editing, you cannot do anythingi else in the system until you close that form (Save or Cancel). Sometimes you may want to see the data on a different record while editing a record. You can open one or more records in a "Read-Only" form (you can't edit it) FIRST, then open the record you want to edit. You can move the read-only form to another part of your screen or another monitor so you can view it while editing.

The read-only form will have a gray background to distinguish it from the editable form. When you're finished, just close them clicking the **Close** button on the toolbar.

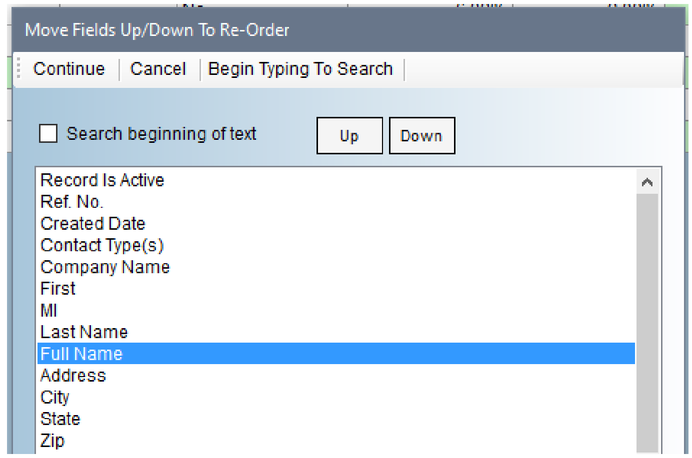


Go To Column

This works the same as the **Go To** on the Worksheet toolbar.

Select Column Order

You can change the order of the columns on a worksheet by holding your mouse down on the column header and dragging it left or right. Another way to do this is by using this utility, which displays a list of the columns in their current order.



Select a field (column header) and then click the **Up** or **Down** button to move the position in the list.

When you click **Continue**, the worksheet will refresh with the selected column order.

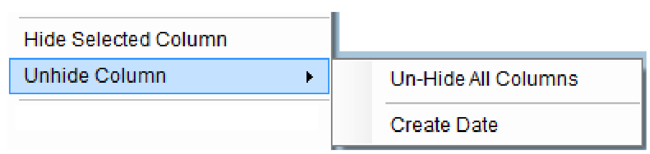
Default Column Order

By default, the Worksheet displays the fields in the same order as they appear on the Form. If you've changed the column order, this option resets it to the default order again.

Default Column Widths

When the worksheet opens for the first time, it attempts to "size" each column so the values are visible. However, as the data changes (some field values get longer), you may still not see all of the information in a row. This option looks at the current data, and resizes each column to display all of the text.

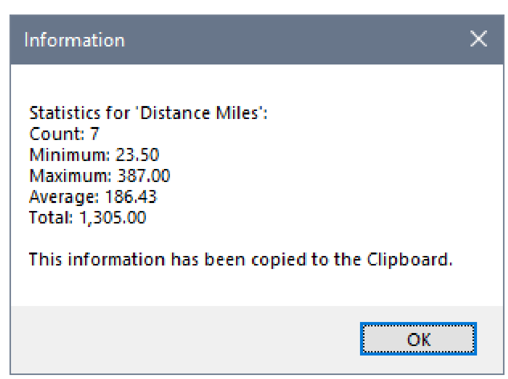
Hide Selected Column



Sometimes you don't need to see all of the columns on a worksheet. An example might be a "Created Date" field, which is on many records. You can click on the column, then right-click and choose this option to hide the column. This column can be "unhidden" by clicking anywhere on the worksheet, and if there are any hidden columns, a list will appear under the **Unhide Column** option.

Selected Statistics / Column Statistics

You can select a column, then right-click on it and choose **Column Statistics** to get a summary of the values in that column, which is automatically copied to the Windows Clipboard.



- Count
- Minimum
- Maximum
- Average (Number Fields Only)
- Total (Number Fields Only)

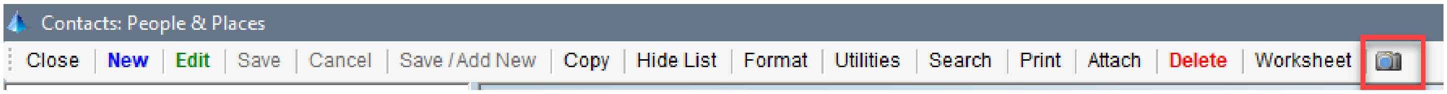
The **Selected Statistics** option works the same way, but only on SELECTED rows in the worksheet.

Copy Cell Value

The last option is to copy the currently selected cell in the worksheet to the Windows clipboard.

Capturing A Screen Print

Screen Print



The last button on the Form toolbar is a little camera; click it to screen print the current form. This can be useful if you're troubleshooting an issue with the system (to send to support), or to share information on the Form with another user.

Form Field Types

As you can see by the image above, different types of data use different types of fields on the form. For example, the **Contact Type** is a list of values where you can check one or more of the options. The **County** and **Country** fields are drop-down lists, which are filled from values entered in **Application Settings**, or on the **Setup Wizard** lists. In this section we'll go through the types of field controls and their specific features.

- **Text Box** – this is the most common field; users manually enter data into this field. Depending on the type of data, this field has some extra features:
  - If this is a date, double-clicking in the field opens a calendar, displaying the current date (or today's date if the field is empty). Select a different date and click **Continue** to enter the date in the field.
  - If this is a number, double-clicking in the field opens a calculator. The current value (if any) is displayed, and any calculations done are returned to the field on the form when the user clicks **Continue** to close it.
  - If this is a website (text will be blue and underlined), double-clicking in the field opens the site.
  - If this is an email address field (text will be blue), double-clicking in the field creates a new Outlook message (if Outlook is available), and puts the email address in the "Send" field on it. User can then edit the email before sending.
  - If this is a memo field (unlimited text, spans multiple rows on the form), double-clicking in it opens a larger edit windows, with **Find & Replace** utilities. Also see the next Section, **Memo Fields.**
- **Text Box (Read-Only)** – This looks like a regular text field, but is never editable by the user. This may display a calculated value derived from a formula or other logic.
- **Checkbox** – When checked, the value is saved as "Yes". If unchecked (default), the value is "No".
- **List Box** – this will display a list of values, which could be:
  - A list of possible values from which you would be expected to select one.
  - A list with buttons that let you add, edit and/or delete values from it.
  - A "history" list of actions taken on the record. For example, each time a status changes, another date & time "stamp" is added to the list to record the change.
- **Checked List Box** – This is a list of items with a checkbox in front of each one. You would check one or more items.
- **Drop-Down (Combo) List** – This list displays a short list of values that you can select (only one). The list "drops down" when you click on it to display the contents. Some drop-down lists have an "Add" button (+)

on the right side, which lets you add new values; others are filled in **Application Settings**, or on the **Setup Wizard** list tabs.

- **Rich Text Box –** This is another type of data entry field like the text box, but allows you to format the text as you would in **Word**.

Image Fields (Picture Box)

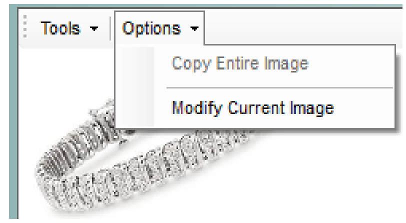
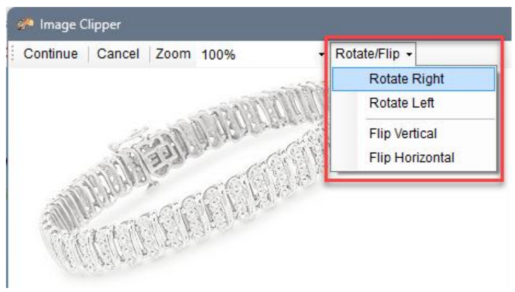


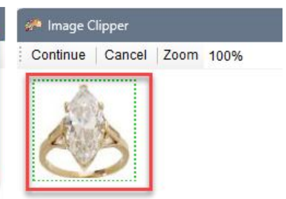
Image fields display a screen print or other image file and have a set of utilities on the **Options** button that lets you edit an image added to the appraisal. These utilities are available on any form where you see this image control.

Click on the **Options** button on the toolbar to open the menu.

Copy Entire Image – Click this to copy the current image to the Windows clipbaord. Once on the clipboard, you can paste it into any other application on your computer (Ctrl+V).

Modify Current Image – This opens the **Image Clipper** dialog that displays the entire image. Use the **Rotate/Flip** options to Rotate the image Right or Left, or Flip it vertically or horizontally. Or if you have a lot of white space around the actual item, which can happen when you take digital photos, hold your mouse down and draw a green-dotted box around just the piece you want to keep.





Click **Continue** to close the **Image Clipper** and update the Image field with your changes.

Resizing & Cropping Images

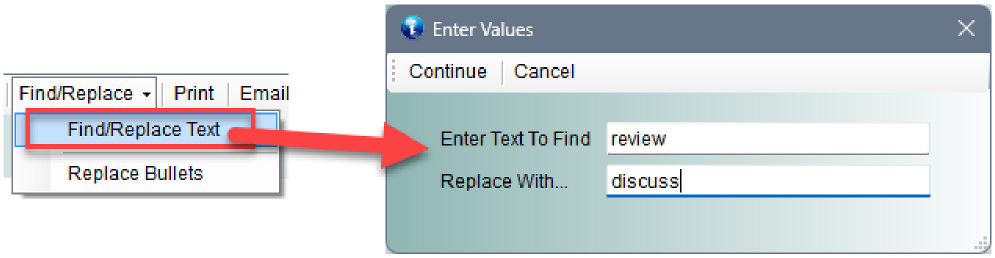
When you take digital pictures, those images can be quite large in size, which takes up a lot of space in your database. When you open the image in the **Image Clipper** and not all of the image “fits” in the window, use the **Zoom** option to show the entire image and then draw the box around the part you want to keep. Not only does that greatly reduce the size of the image when written to the database, but it also presents just what you want to focus on in the image.

Custom Field Types

Some controls on a form are customized for a specific purpose. For example, if a form has many linked rocords (child records) a custom list with its own toolbar will display them. See the application’s user guide for the specific features of such controls.

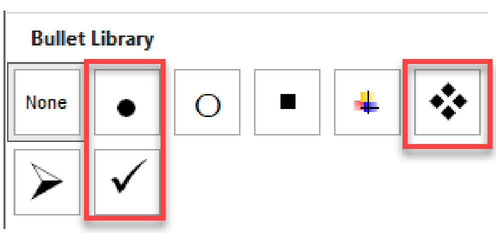
Memo Fields

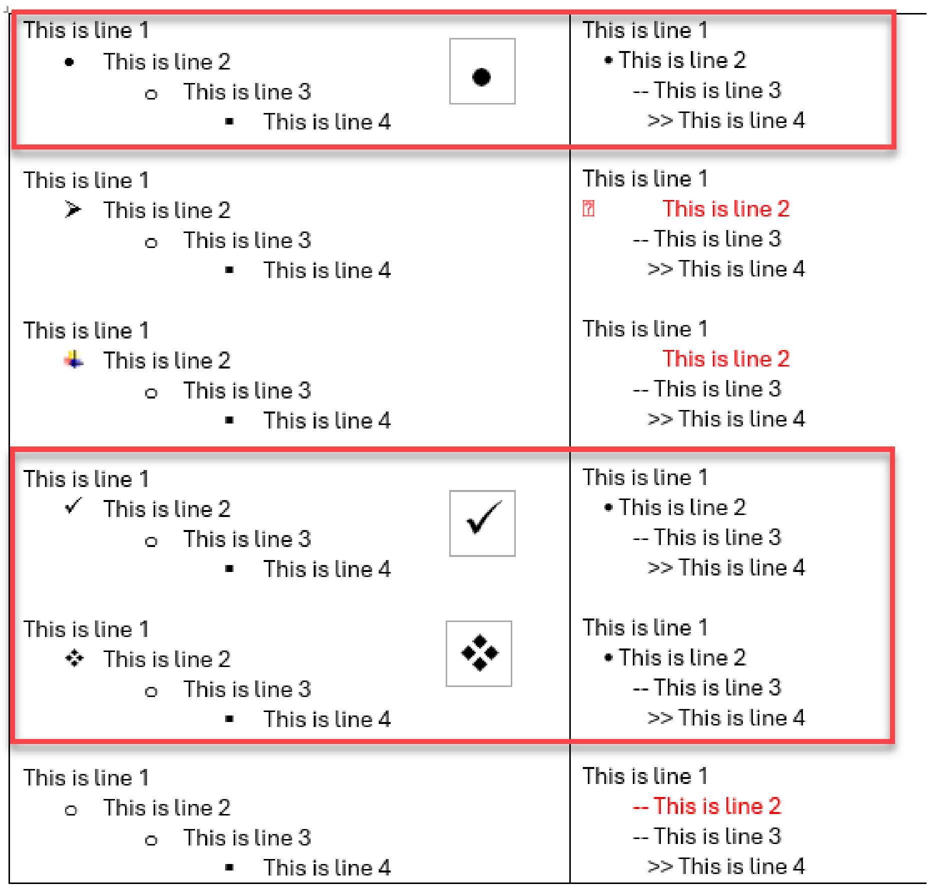
When you double-click in a text field to open the larger edit field, you have several custom options for the displayed text. Click on the **Find/Replace** button on the toolbar to do a simple “find” text and “replace” with new text.



If you copy text from a Word document, then paste it into a field, the bulleted text doesn’t transfer correctly. The **Replace Bullets** utility reformats Word bullets into readable text. NOTE: This only works when the original bulleted list in Word was created using the round dot, the checkmark or the four-diamond bullets (see Bullet Library image below).

Other bullets transferred from Word ALMOST reformat correctly, but you may need to manually cleanup the text, as shown on the items in red text below.





This is line 1 • This is line 2 o This is line 3 ▪ This is line 4	This is line 1 • This is line 2 -- This is line 3 >> This is line 4
This is line 1 ➤ This is line 2 o This is line 3 ▪ This is line 4	This is line 1 This is line 2 -- This is line 3 >> This is line 4
This is line 1 This is line 2 o This is line 3 ▪ This is line 4	This is line 1 This is line 2 -- This is line 3 >> This is line 4
This is line 1 ✓ This is line 2 o This is line 3 ▪ This is line 4	This is line 1 • This is line 2 -- This is line 3 >> This is line 4
This is line 1 ❖ This is line 2 o This is line 3 ▪ This is line 4	This is line 1 • This is line 2 -- This is line 3 >> This is line 4
This is line 1 o This is line 2 o This is line 3 ▪ This is line 4	This is line 1 -- This is line 2 -- This is line 3 >> This is line 4

The Main Menu Toolbar

Every application opens to display the **Main Menu**, which displays the application's workflow and provides access to all standard features.   Every application's Main Menu has a toolbar at the top with these options:

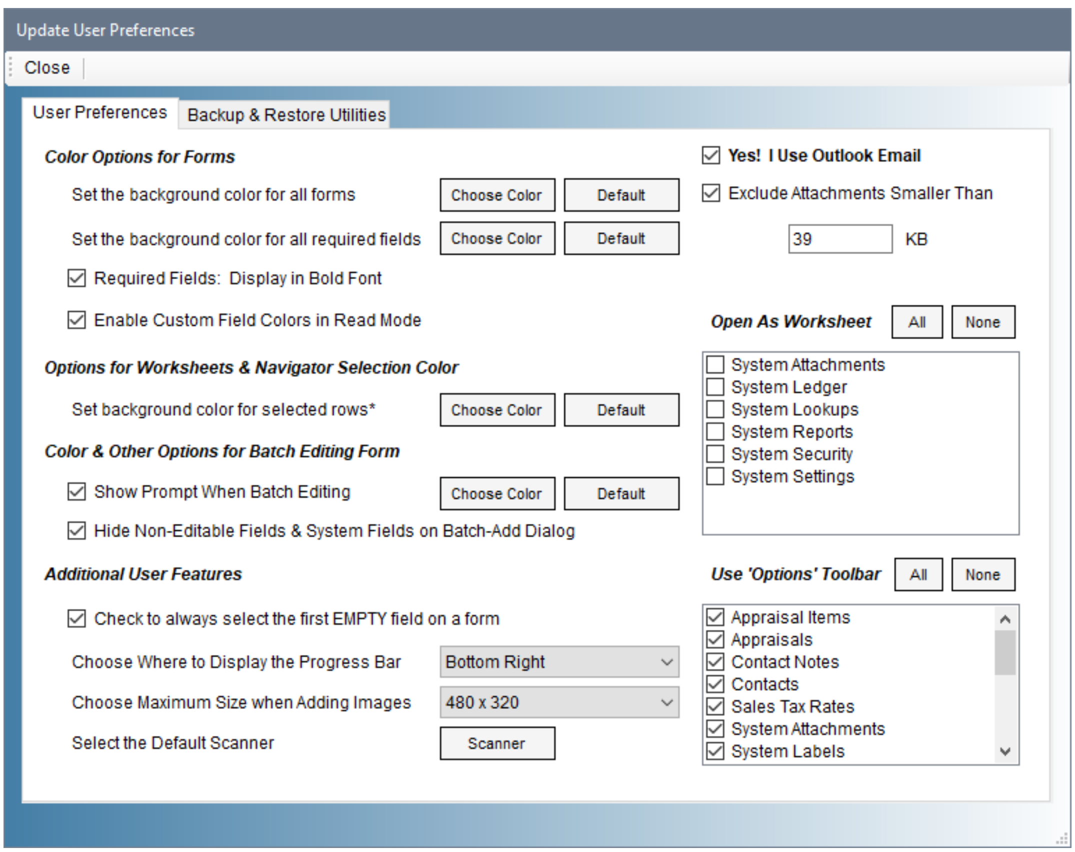
- Preferences
- Utilities
- User Guides

Each of these utilities are described below. Some applications also have additional links, such as the **Setup Wizard** on **basicAppraisals** and **essentialAudit**. This wizard allows users to customize the application with additional settings.

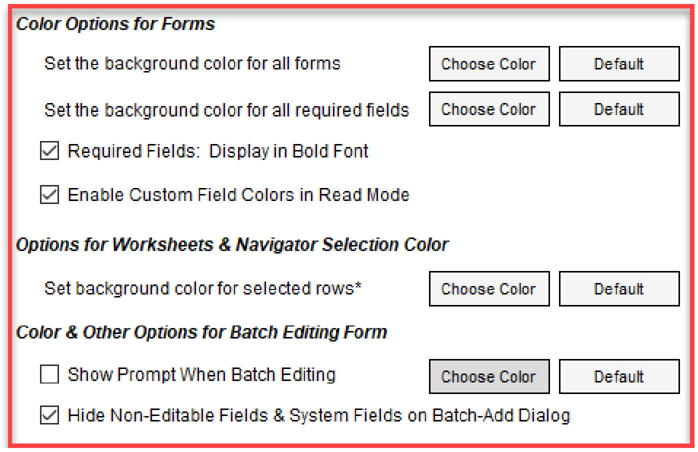
User Preferences

User Preferences provide a way for YOU, the user, to define the interface (forms, worksheets, etc.). With so many possible hardware configurations, such as monitor resolution, and graphics adapters, we cannot possibly adjust the application to look best on all of them. User Preferences lets you pick and choose what options work best for you on each system.

Click on the Main Menu Toolbar >> Preferences to open the general preferences dialog. Each option is applied application-wide without any further customizations needed.



Color Options



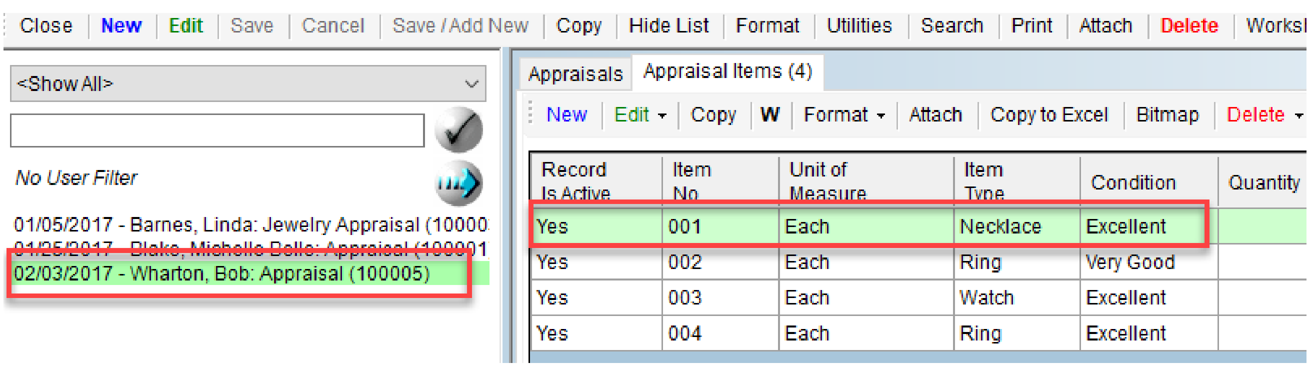
The first section is for changing the background, highlight and custom field colors.

Color Options for Forms

As it says, this changes the background color for all forms. The default is what you see on this dialog BEFORE making any changes. Click the **Choose Color** button to select a different color, of the **Default** button to reset to the application's initial color.

Options for Worksheets & the Navigator Selection Color

This color choice is displayed on all worksheets when a row is selected, and also is the highlight color in the Navigator when a record is selected.



Color & Other Options for Batch Editing Form

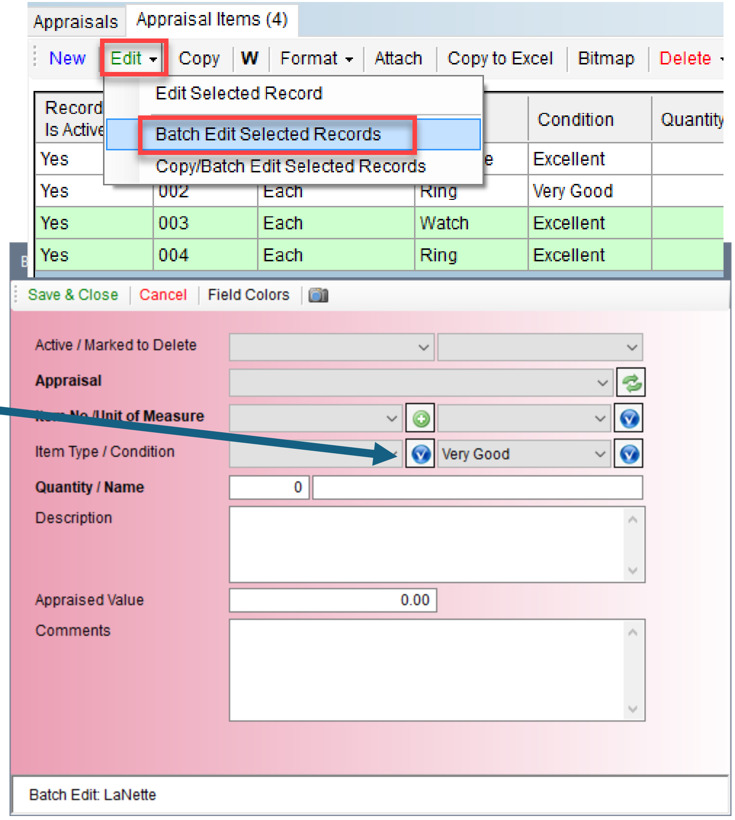
The **Batch Editing Form** is displayed whenever you use the **Batch Editing** feature on any worksheet. **Batch Editing** allows you to change the same field(s) in multiple records to the same value. The alternative is that you need to edit each record, save and close it.

There are two options here to "remind" you that you're changing multiple records in a single action. The first, is to change the background color of the Batch Edit dialog to some other color (other than the general background color set above). In the example below, it's been changed to a dusty rose, which stands out from the standard blue.

The second option is to get a prompt, telling you you're about to change more than one record, and giving you a way to cancel the changes before they're applied. See the example on the next page.

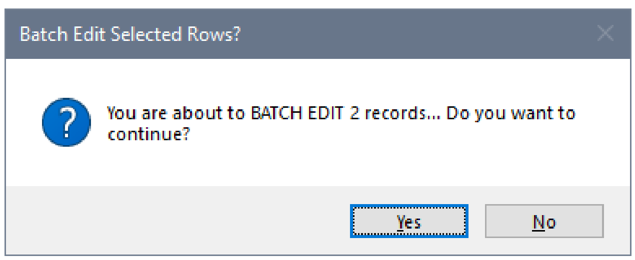
Batch Edit Example

1. Select two or more rows in a worksheet, then click **Edit >> Batch Edit Selected Records** on the Worksheet toolbar.



2. The **Batch Edit** dialog opens, with the color changed to a dusty rose. We're going to change the **Condition** value for these two records to **Very Good.**

3. When **Save & Close** is clicked, the reminder says:

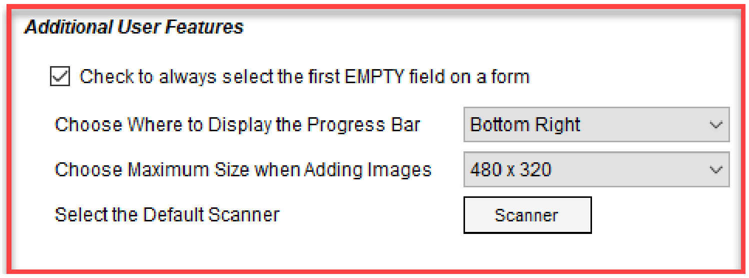


If you click **No**, no changes are made. Click **Yes** to edit the records, which now look like this:

Record Is Active	Item No.	Unit of Measure	Item Type	Condition	Quantity	Name
Yes	001	Each	Necklace	Excellent	1	Gemstone necklace in gold
Yes	002	Each	Ring	Very Good	1	Sapphire & Diamond Ring
Yes	003	Each	Watch	Very Good	1	Silver Pocket Watch and Chain
Yes	004	Each	Ring	Very Good	1	Ruby Ring

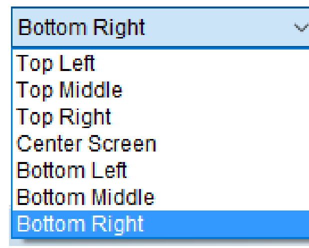
Additional User Features

The **...select the first EMPTY field...** option, when checked, automatically puts your cursor into the first editable field on each form. This option is checked by default.



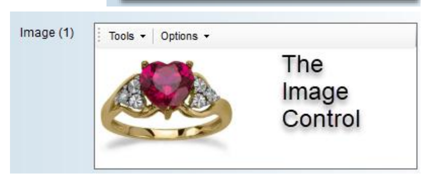
Setting the Progress Bar

When an action takes a little more time than expected, a **Progress Bar** is displayed on the screen. By default, it'll show in the Bottom Right corner of your screen. You can change this by selecting a different location from the list.



Limiting the Size of Images

Images take up a lot of space! If you're capturing images on a high-resolution camera (or your phone's camera), adding those images increases the size of your database very quickly. To manage that, the system will resize all of the images you add on the Image Control (the picture fields >>) to reduce the footprint in each record. The default is **480 x 320**, which still prints most images clearly and is the recommended setting.

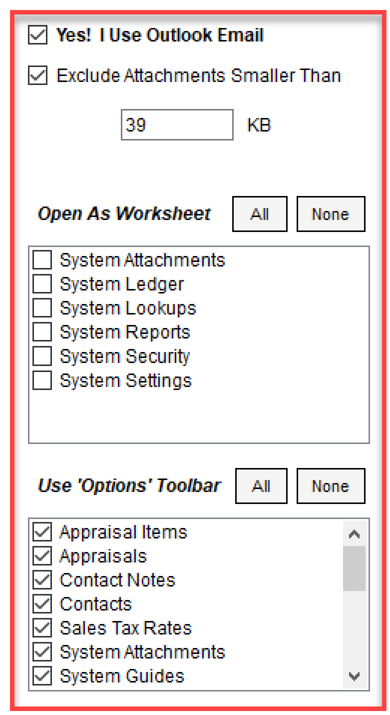


Setting the Default Scanner

If you have a scanner attached to your computer, you can specify it as the default Scanner. This option is used by the Image Control as well, but you can reset it on the **Tools** menu if it's not set here.

Enabling Outlook Integration

If you have any version of Microsoft Outlook as your email application, check the **Yes! I Use Outlook Email** checkbox here. When this is checked, all of the integrated email options become available in the system. These include a button on the **Print Preview** window to automatically attach your report into a new Outlook message, and then display it on the screen for you to complete before sending.



Excluding Logos & Emojis From Outlook Messages

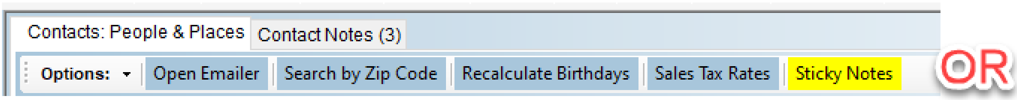
Check the **Exclude** option for attachments, and enter the default **39** in the **KB** field. This is used by Contact Notes, when you want to add an entire email chain into your Note (for documentation purposes), but don't need to include any Signature logos or animations. This strips out any image smaller than 39KB, but still saves larger attachments in the **File Attachments** table.

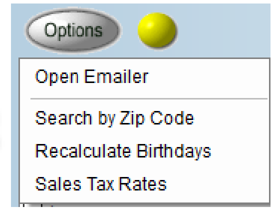
Open As Worksheets

The **Open As Worksheets** checkboxes, when checked, will display the data in a Worksheet instead of the form you see by default. This feature is limited to System tables. By default, none are checked.

Use 'Options' Toolbar

The last set of options relates to whether the **Options** button on a form (if there is one) is displayed as as Toolbar at the top of the form (default), or as a button with a drop-down menu.





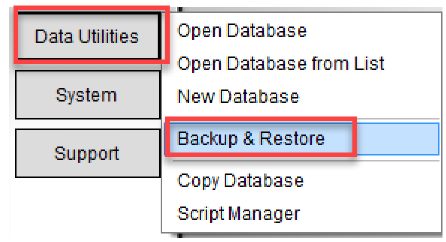
Backup & Restore Utilities

NOTE: These utilities are only available if you are using SQLite database, which is the only database type that uses a single file for storing data.

If you have a Team version of any software product, your data will be stored in **SQL Express** or **SQL Server** database, which is housed on your network on a workstation (SQL Express) or Windows server. Typically, server data is backed up by your IT department, and consequently users are not responsible for ensuring they have a **Backup & Restore** strategy.

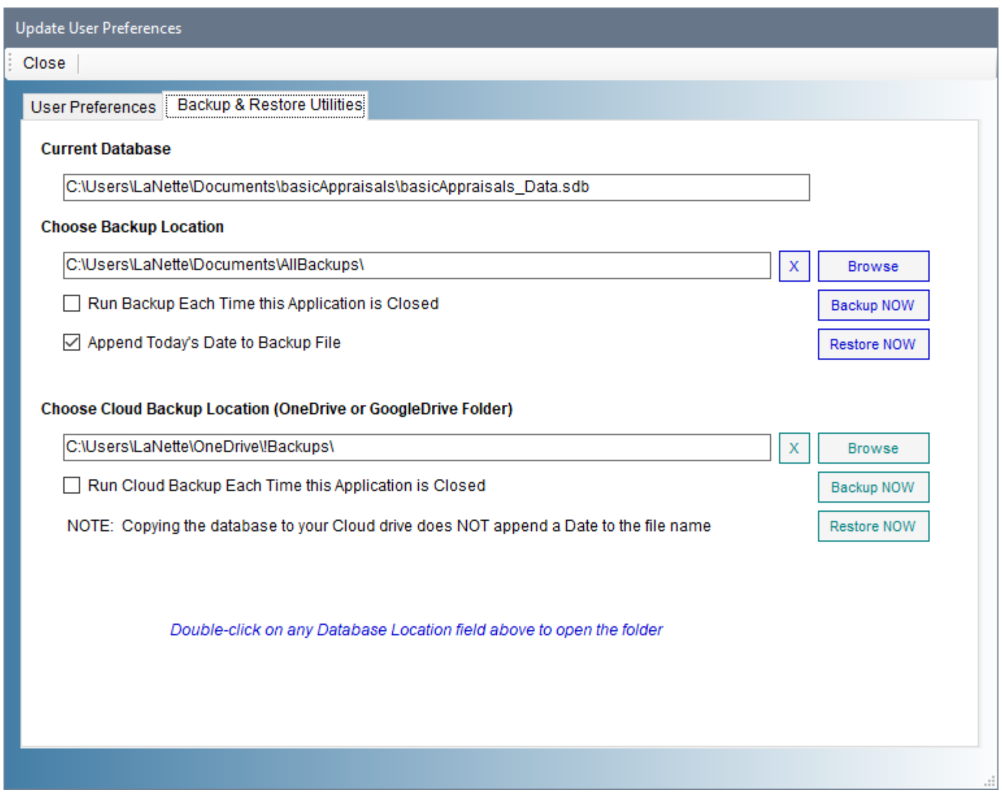
NOTE: the Backup and Restore features can also be opened from the Main Menu by clicking on:

Main Menu >> Data Utilities >> Backup & Restore



Backing Up Your Database

Backing up your work is very important. The standard for protecting your data is "three copies: your production data, a copy to an external drive/disk, and an online "Cloud" copy (or off-site). Setting up this process in all Phase25 products is fast and easy!



Current Database

This field defaults to the current database you're using, and will be the database that gets "backed up" each time this utility runs.

Choose Backup Location

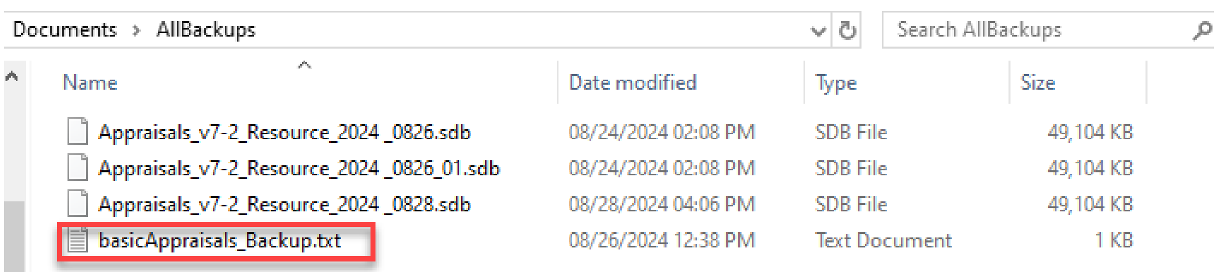
Click the **Browse** button on the right to select a location for the backup. NOTE: When you select a folder, a small text file is created and saved in that folder to identify it (don't delete it).

Where to save the backups? You can consider several folder options:

1. Just choose another folder on your computer. This won't protect your data if your computer dies, but it will give you a way to "go back to a previous copy" if you mistakenly delete your entire Contacts table, for example (yikes!).
2. Choose a removable drive plugged into your computer. Examples: an SD card, a removeable hard drive (any type, mechanical or SD), a flash drive. Only two things to remember using one of these: Make sure it has enough space for multiple copies of your database, and make sure it's connected before starting a backup. This will do the same to protect your data as Option #1, and also protect it if your computer stops working.

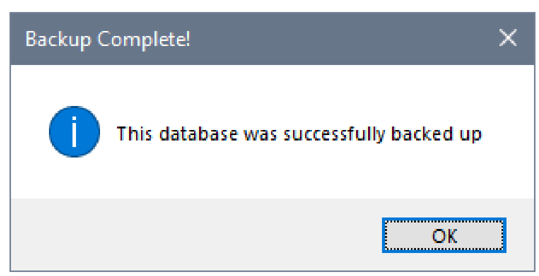
There are two additional options for this backup plan:

1. Run Backup Each time this Application is Closed
   a. This automates the backup; when you close the Main Menu, the backup will be done.
2. Append Today's Date to Backup File
   a. This will "date" each copy so you can restore an older copy than the most recent one if you would need to for some reason. If more than one backup is done on the same day, the subsequent backups files will get numbered, with a **_01**, **_02**, etc. appended to the name.



Running the Backup

Click the **Backup NOW** button to run the backup immediately. Depending on the size of your database, and the speed of an external drive (if that was your choice), this should only take a minute or two (or less). A message will tell you when its done:



Monitoring Backups

As it was mentioned earlier, copying your full database every day can take up a lot of disk space. You may want to regularly delete older copies or move them off your computer (if Option #1 above is used) to reduce the drive usage on your computer.

You can open either Folder Location by simply double-clicking on the File Path, as noted on the bottom of the form:

Double-click on any Database Location field above to open the folder

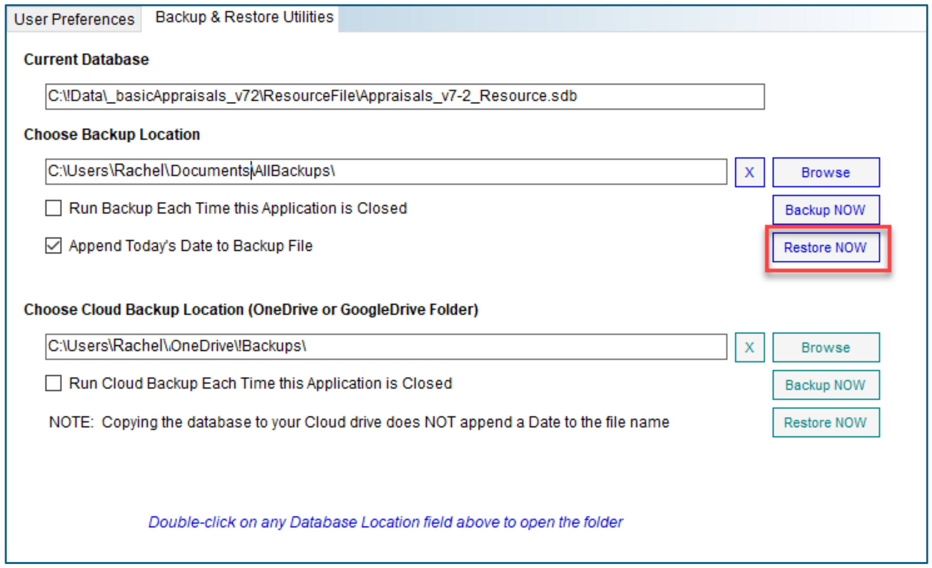
Choose Cloud Backup Location (OneDrive or GoogleDrive Folder)

This setup works the same way, except you need to choose a folder that's used by your cloud service (OneDrive or GoogleDrive). When the backup is done, which copies your database WITHOUT a date appended to it, the existing copy in that folder will always be overwritten. The cloud service will "sync" it to its servers (in the cloud), just as it does when you save any file to a cloud folder.

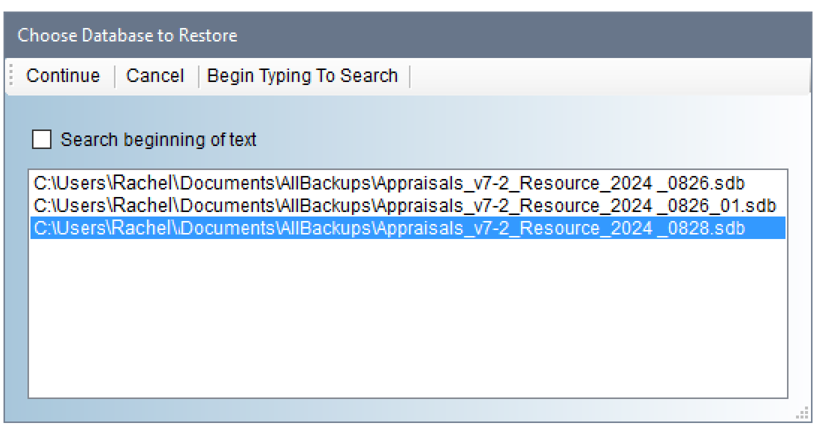
Restoring A Backup

Now that you have a backup of your database, let's see how to restore it. This process works the same regardless of whether you're restoring a database from a folder or a cloud location.

1. Click the **Restore NOW** button.

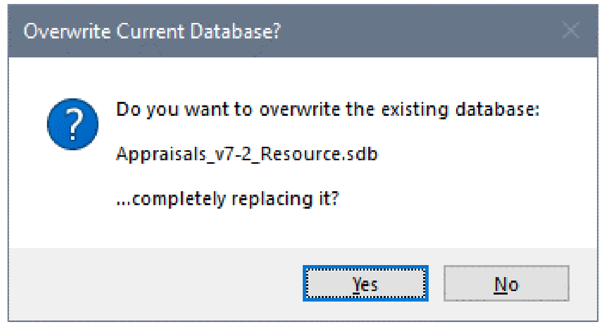


2. A list of available database files is displayed. Select the one you want to restore from the backup folder and click **Continue**.

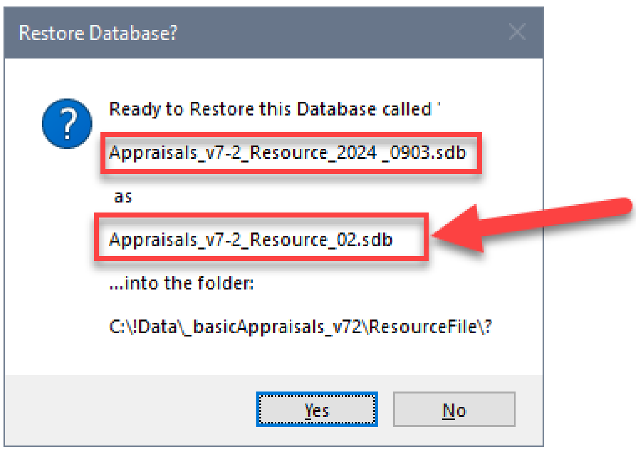


3. **IMPORTANT! Read the message in the next prompt!** It's asking you if you want to REPLACE the current database with the selected file. IF YOU CHOOSE **Yes**, your current database will be overwritten.

   This option should only be used if you KNOW that your current database has been corrupted or the data is complete unusable. It's always safer to choose **No**, so you have both copies of your database in case there's something still of value in the previous one.



4. If you choose **No**, in the previous step, the database will be copied to the same location as your current database and a number will be appended to the name so it's a unique name. **READ THE MESSAGE carefully!**

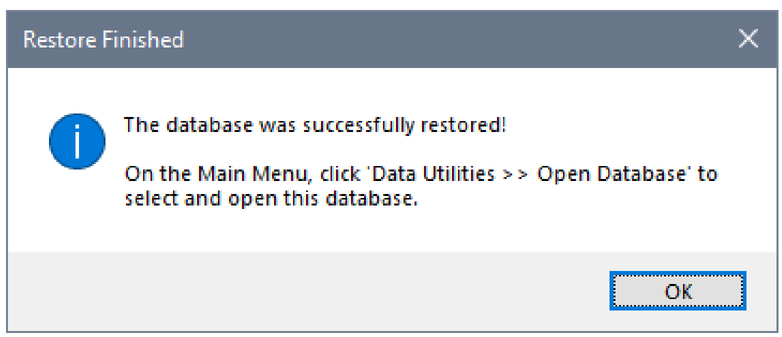


The backup date is removed from the name, and a "02" is appended to it to keep from overwriting an existing database.

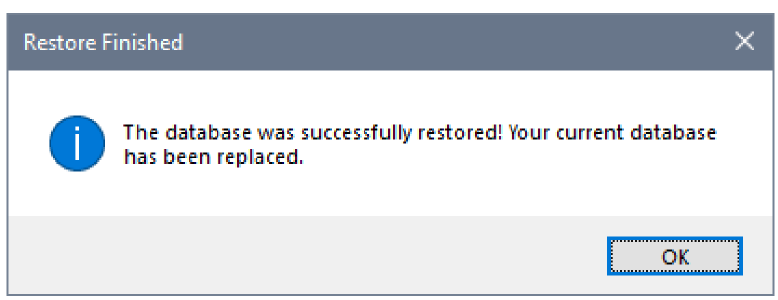
5. Click **Yes** to restore the database. A message (below) will tell you when it's been successfully restored.

If you chose **Yes** in Step 4, to NOT overwrite your current database, you'll get this message.

Main Menu >> Utilities >> Open Database

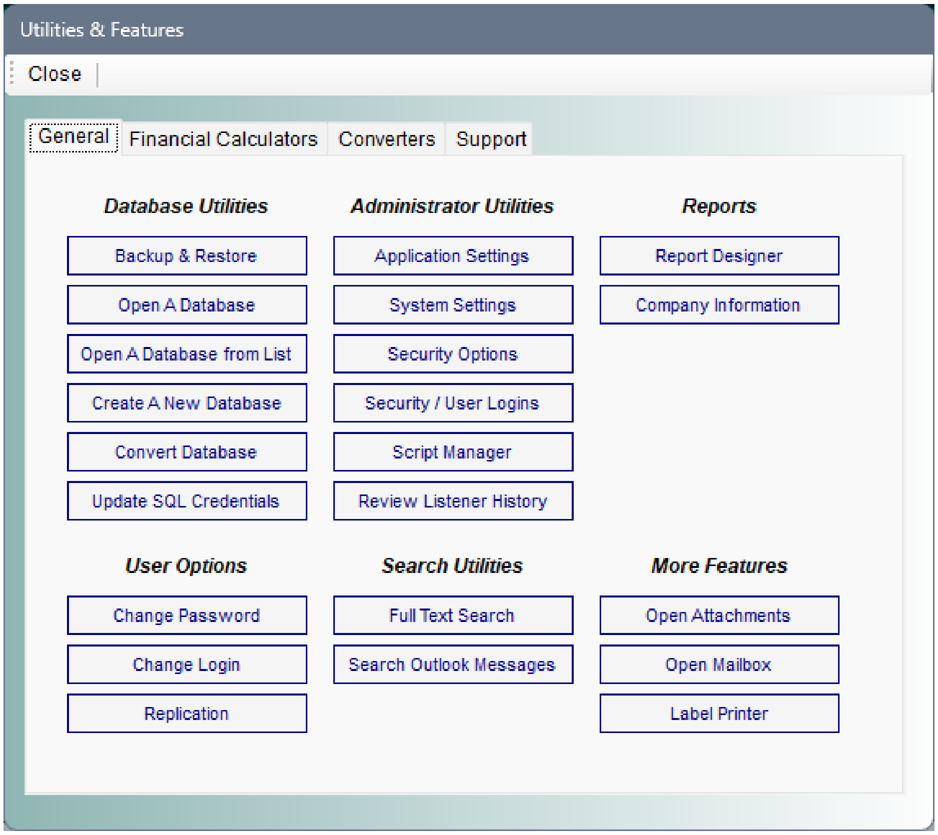


If you chose **No** in Step 4, you'll see this message.

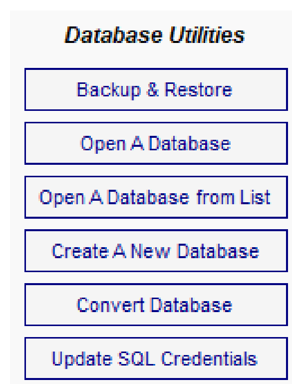


Utilities & Features

Click on the Main Menu Toolbar >> Utilities to open the Utilities & Features dialog. This form will "float" on your desktop to give you access to its features any time you need them, such as the calculators or converters.



General Tab: Database Utilities

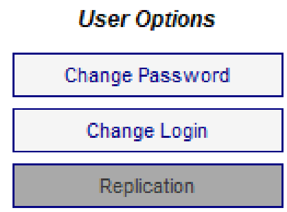


This section has all of the utilities for working with a database:

- **Backup & Restore** – This opens the second tab on the Preferences dialog (see above), where you can setup your backup and restore paths for your database.
- **Open A Database** – If you have more than one database (more than one business?) you can use this button to switch from one database to another. This is just the same as if you opened a Word document, then opened a different one.
- **Open A Database from List –** When you open a different database, the name of it is stored in this list. So if you know you've opened it before, choose this option to open it again. Just select the database in the list and click **Continue**.
- **Create A New Database** – If you want to create a new database, use this option to select the type and define the name of it. If you have a Team version of your application, you will have the option to create a new SQL or SQL Express -type database in addition to the SQLite version available in all applications.
- **Convert Database –** This option is available only if you have the Team version of your application, which converts your current database to one of the network-capable database types. For example, the default database type for a single license is SQLite. If you add users to your license package and upgrade to the Team version, you can use this utiity to convert your SQLite database to a network-based database (SQL or SQLExpress), which can then be shared with other users.

- **Update SQL Credentials –** This also only applies if you have a Team version of your application and are using SQL or SQL Express as the database storage type. This lets you switch the Server name and login credentials if they should change. If you're not using a Team version, this option is disabled.

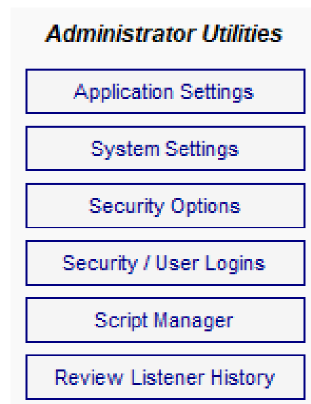
General Tab: User Options



This section has all of the utilities for working with security-enabled systems. The first two options are only enabled IF you have turned on Security in the current database.

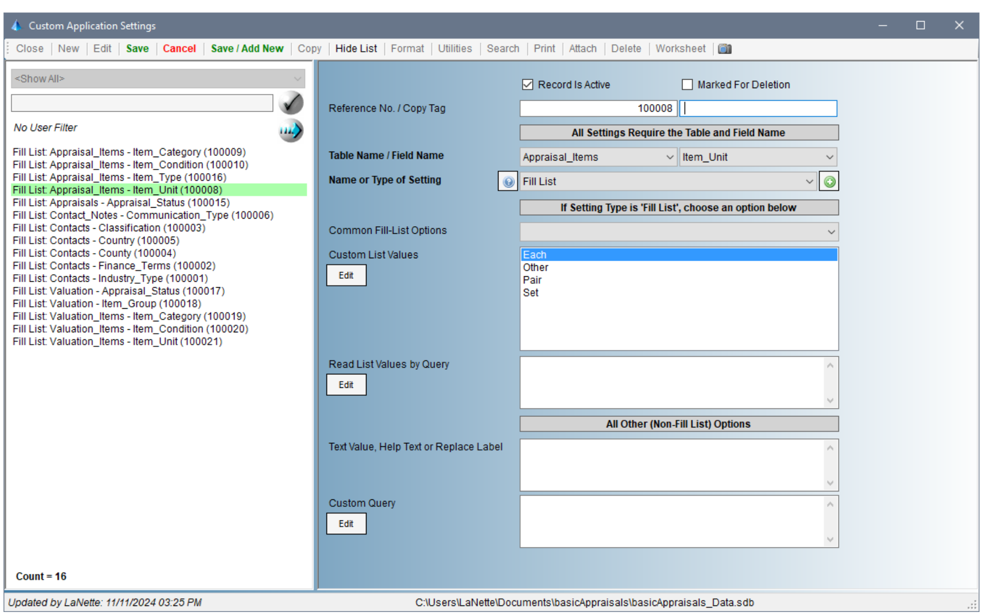
- **Change Password –** If you have Security enabled on your database, where users must have a valid Security login record, and automatic Windows sign-on option is not used, this option lets users, who normally will not have access to open the Security page, a way to change their password.
- **Change Login –** Typically each user logs into the database with their own credentials, but sometimes, if an employee leaves a company, the manager will need to login under the employee's credentials to see and/or edit the data the employee was responsible for maintaining. To use this, the user must know the employee's name and password.
- **Replication –** If your application supports Replication, or Remote User Data Synchronization, the option will be enabled. This opens the Replication utilties that work with Outlook to send and receive data from a central location. This is a feature used in organizations where some users work outside of a central network. For more information, see the **Phase25 Replication Guide**.

General Tab: Administrator Utilities

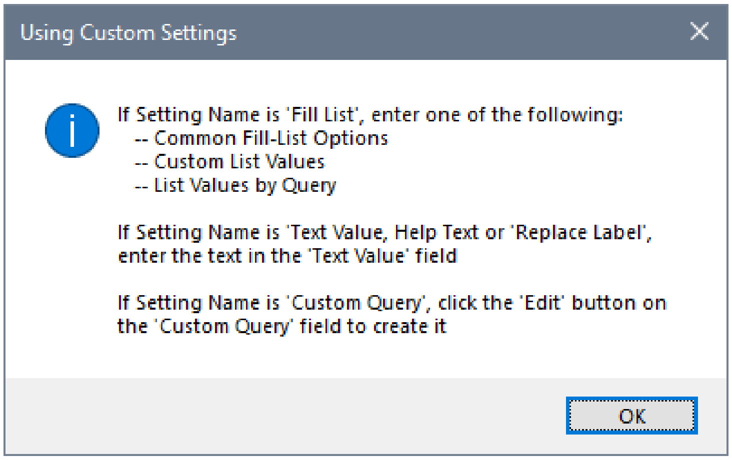


This section provides access to the data that only an Administrator SHOULD have access to. If you are using a single-user application, you are, by default, the Administrator. Typically, these options are not needed for day-to-day use. However, if you need support, our support team may need access to this information to troubleshoot a problem.

- **Application Settings –** This is the first level of customizing in an application. For example, values that should be displayed in a drop-down list can be edited here (or also in the Setup Wizard if the application uses one). If you have Security enabled in a multiple-user (Team) System, you can give one or two "power users" access to this page for maintaining lists.



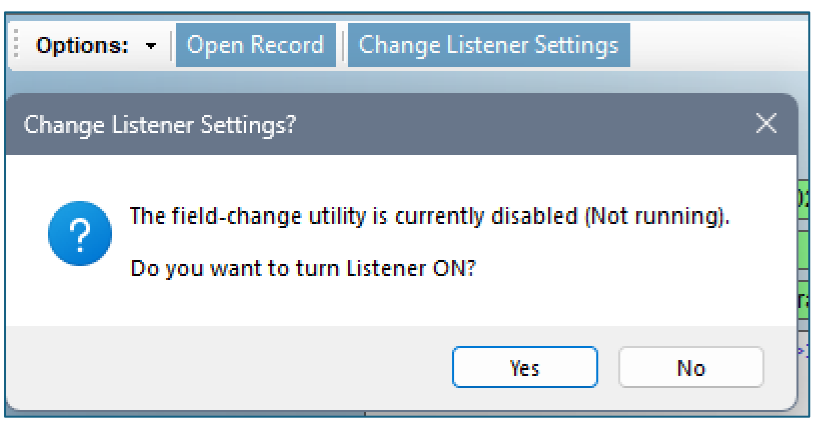
Click the **Help** button on the left side of the **Name or Type of Setting** field to see the options for filling drop-down or listboxes on this form:



- **System Settings** - These are settings used across the database and all users and should NOT be edited unless directed to do so by our Support Team.
- **Security Options** – This opens a small dialog that lets you turn Security Logins on or off. If your application has a Setup Wizard, these options are also included there and work the same.
- **Security / User Logins –** This opens the Security page where User credentials and access levels are maintained. If Security has NOT been enabled, this option is disabled.
- **Script Manager** – This opens a simple querying tool for the data in the current database. Again, this is typically only used by our Support Team when issues arise.
- **Review Listener History** – See the next section.

The Listener – Logging Field Changes

If your application includes support for field-level changes, you will see this option which opens the Listener page. The **Listener** "listens" and records every change in every field in the system. This is disabled by default, but there's an option on the page to enable or disable this feature called **Change Listener Settings**. This toggles the utility on/off for all tables in the system and is effective immediately for the current user.

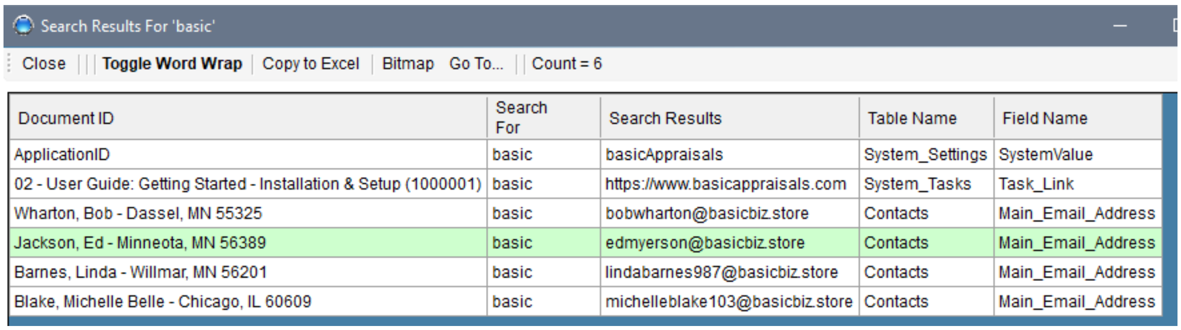


Another option on the Listener page is **Open Record**, which will open the page where the record exists (if it still exists), and automatically select that record in the Navigator.

General Tab: Search Utilities

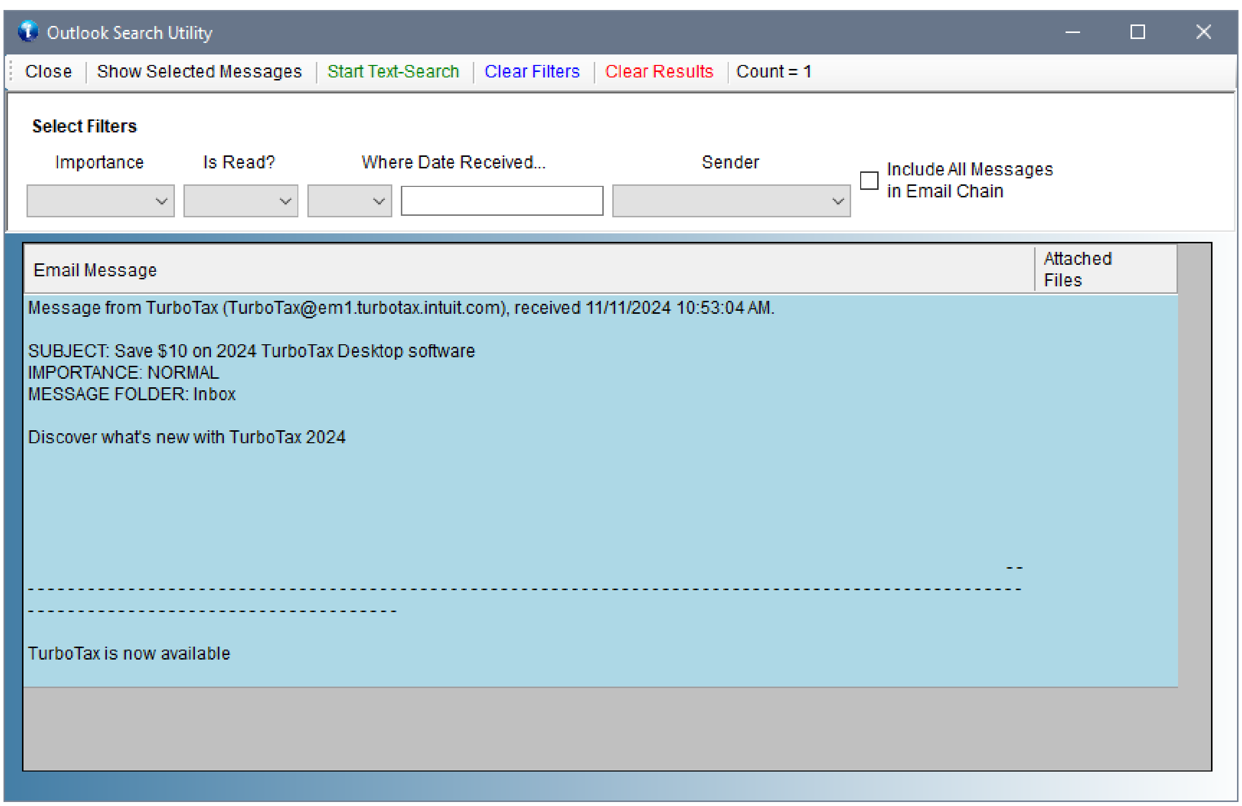
This section provides a way for users to do a full text search on the entire database or in your Outlook email application.

- **Full Text Search**- This is a wider Search option than running it from the Form or Worksheet toolbar in that it looks at every table in the database. As with the Form or Worksheet utility, it is NOT case-sensitive, and every text field is queried to find records that CONTAIN the search text. When the search is finished and records are found, they are displayed in a Worksheet like this:

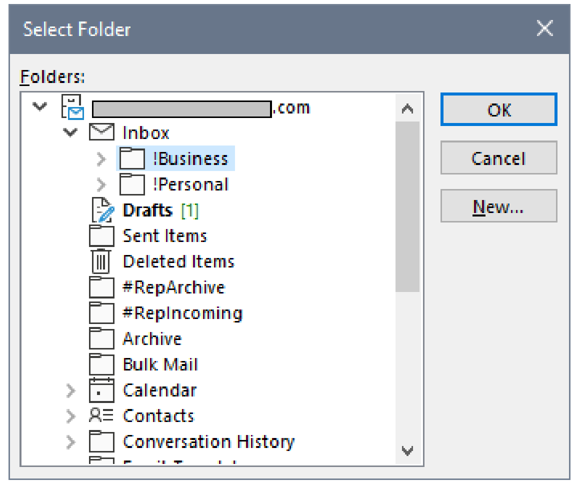


  The **Table Name** and Field Name columns tell you where the text was found. The **Search Results** column shows the text with text preceding and following the search text. To open the record, just double-click on the row to open the page and automatically select the matching record.

- **Search Outlook Messages** – If you are using Outlook as your email application, and you have the **Yes! I use Outlook** option in **User Preferences** checked, this search option will be enabled. Clicking this button opens the Outlook Search Utility where you can do a text search on any folder in your Outlook email box.



To search in Outlook, click the **Start Text-Search** button on the toolbar and enter your text. Again, NOT case-sensitive. A popup from Outlook will prompt you to pick the top-level folder to search. Keep in mind that if you have many messages in that folder, or especially in folders inside that folder, the search may take longer than a few seconds to run.



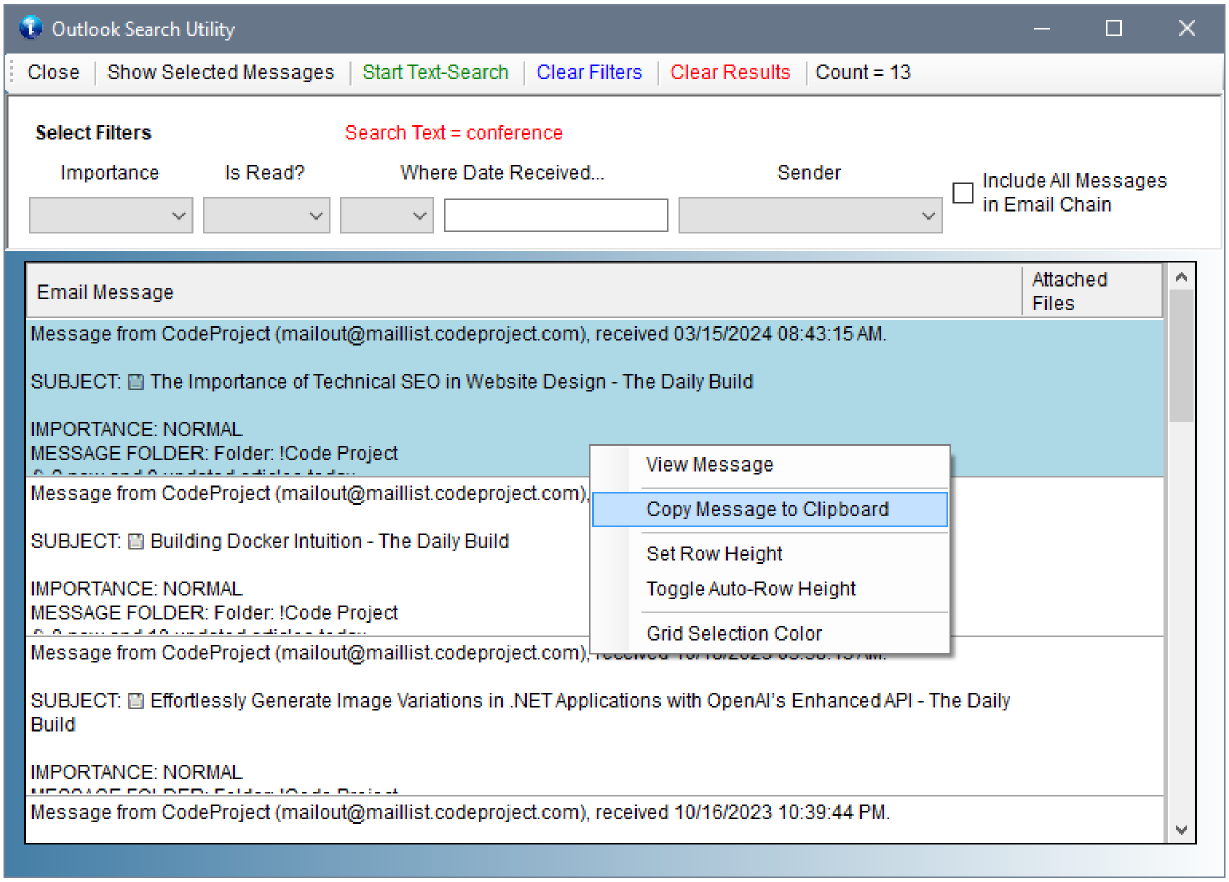
Click **OK** on the dialog to run the search. A progress bar in the lower right corner of your screen will display the task.

When it's finished, the worksheet on the Outlook Search Utility will display the results. Any formatting or images will be filtered out of the text, and all attachments will be listed in the **Attached Files** column in the worksheet.

The text you searched for will be displayed in red text as the top of the form, and the number of emails found (Count) will be on the toolbar. You can use the additional search options on the drop-down lists on the Toolbar (Importance, Is Read?, by Date Received, or by Sender) to refine the results.

Right-click on the worksheet for additional options (refer to the next screen print):

- View the Message – Opens a larger window so you can see more of the text.
- Copy Message to the Clipboard – This copies the text to the Windows Clipboard
- Set Row Height – A formatting option for the worksheet.
- Toggle Auto-Row Height – This toggles the specified row height and the default height of each row.
- Grid Selection Color – The blue you see in the screen print is the default; change this to any color.



Tip: You can double-click on any row to open the original email in Outlook. This is a very useful utility when you need access to the formatted message and any attachments.

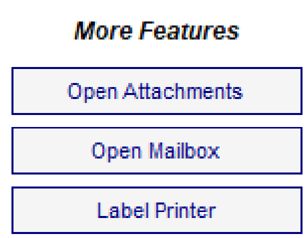
Show Selected Messages: This button will display any and all selected messages in your current Outlook view. For example, if you have a folder of messages that you want to search for some particular text, select them in Outlook, then click this button to display all of them in the worksheet. Then use the drop-down search options to drill down into the email(s) you're really looking for.

General Tab: Reports

This section gives you access to the Report Designer and for entering your company information in one place, to be used by all reports.

For more information for both of these options, see this guide: **Phase25 Report Designer Guide.**

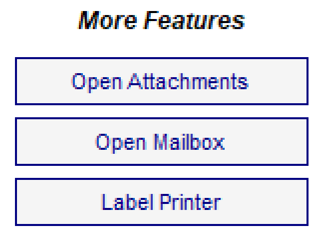
General Tab: More Features



The buttons in this section open forms for features that can be used from any form or worksheet in the application. See the section below, called **File Attachments**, which describes how you can attach external files to a record, and see the user guide called **Phase25 Printing Guide** for information on using the **Mailbox** and the **Label Printer.**

File Attachments

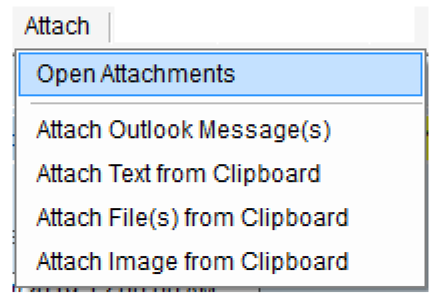
You can attached related files to any record to be stored in the database by using the **File Attachments** features. These features are available from several different locations in the system.



Main Menu

Click on the Main Menu Toolbar >> Utilities >> General (tabl) >> Open Attachments. This form will display ALL files attached in the database.

The Form Toolbar



Click the **Attach** button, which displays multiple options for attachments. Note that opening Attachments from a record's toolbar links the attachment to that record.

Open Attachments – This opens the Attachments form and displays ONLY those attachment records for the current record you have on your screen.

Attach Outlook Messages – This requires that you have Outlook on your computer, that you have it open, and that you have selected at least one message in any view in Outlook. The message in each Outlook email will be saved in a text file (Notepad), and any attachments will also be added.

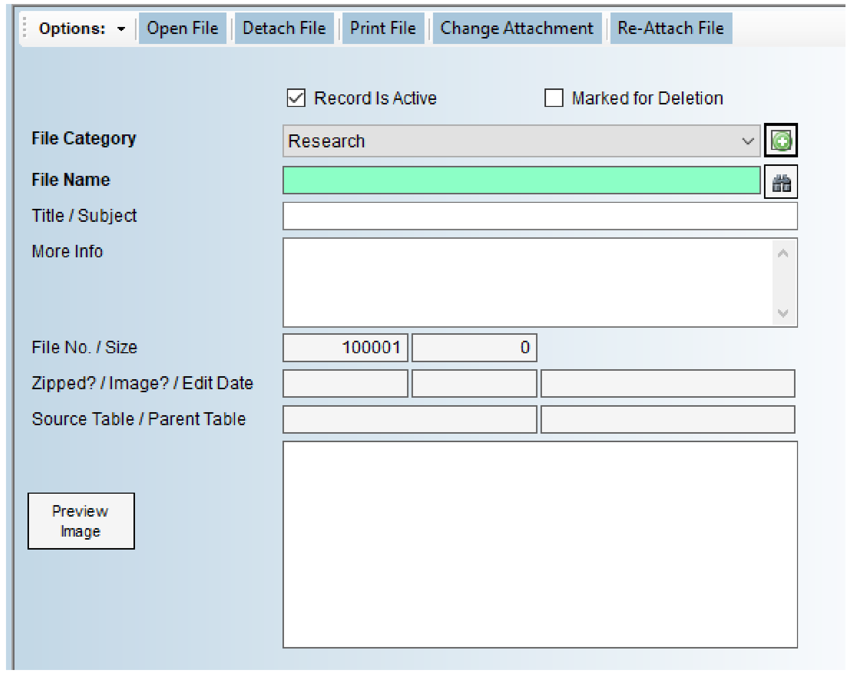
Attach Text from Clipboard – If you have just copied some text to the Windows Clipboard, this option will save that text in a text file (Notepad), and then attaches the text file.

Attach Image from Clipboard – Works the same way with an image you may have copied to the Windows clipboard. This creates an image file (Bitmap .bmp) and saves it into the Attachments table.

The Worksheet Toolbar

Clicking on the **Attach** button on the Worksheet toolbar opens the Attachments form and displays only those records that are linked to the currently selected row in the Worksheet.

Adding Attachments



The following fields are used to categorize and describe each attachment.

File Category

This helps keep the file attachments orderly; you can add any text to this drop-down list by clicking the green plus (+) button on the right-side of the list.

File Name

Click the **Browse** button on the right-side of the field to select the file to attach. The actual file name will populate the field.

Title / Subject

Enter a meaningful title for this attachment; something that quickly describes it is best.

More Information

Use this field to describe what this attachment is. Keep in mind that since all fields in the table are text-searchable, adding descriptive language here may help you find an attachment if you've forgotten the name or category.

File No. / Size / Zipped? / Image? / Edit Date

These fields are automatically calculated. Each file is assigned a unique number in the **File No.** field to help identify it and to keep it unique in the Navigator. The **Size** field displays the actual size in bytes. When files are added, they're compressed (zipped) to reduce the space in the database. The **Zipped?** field indicates this by putting a **Yes** in this field. The **Image?** field says **Yes** if the attachment is a graphics file. The **Edit Date** shows the date and time the file was last changed.

If the attachment is associated to a particular record, the records table name and parent table names are entered automatically.

If the attachment is an image, it will be displayed in the **Preview Image** field; you can click the button to refresh it if it has been changed.

Attachment Options

The options on the Options toolbar (or button) are described below.

Open File

This opens the attached file in its native application. For example, if this is a Word document, Microsoft Word will open and display the document. If you are going to edit the file, and then want to reattach it, make sure to click the

Edit button on the Toolbar before opening it. Then you can use the **Reattach** button before you click **Save** to automatically pulled the updated file into the record.

Detach File

This is like using **Save As...** in any other application. A copy of the file is saved to a location on your computer or network and the original file is still the same attachment.

Print File

Use this button to Print the file without opening it in its native application.

Change Attachment

If you want to remove the current attachment, and replace it with a different file, use this option, which deletes the current attachment.

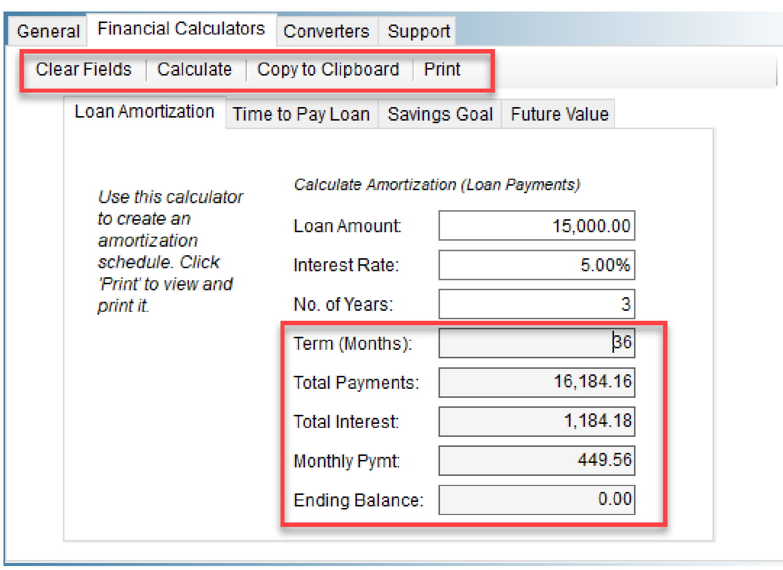
Re-Attach File

If you want to edit the file and then update the File Attachment record with its changes, be sure to click the **Edit** button on the toolbar FIRST, before opening it. When you're done editing, saving and closing it, click the **Reattach** button to overwrite the current file attachment in this record.

NOTE: If you forget to use the **Reattach** button when you've edited a file attachment, you'll get a prompt when you close the **File Attachments** form, asking you if you want to reattach any edited files. If you choose to do so, the current file attachment will be overwritten with those last changes you made.

Financial Calculators

This tab has four financial calculators, and the results from any of them can be 1) copied to the Windows clipboard (click the **Copy to Clipboard** button) or 2) printed (**Print** button on the toolbar).



- **Loan Amortization** – This will calculate a full amortization schedule for a loan using the **Print** option. Enter the Loan Amount, Interest Rate and the Number of Years the loan is taken for. Click **Calculate** (or tab out of the last field) and the results will be displayed (see above).

- **Time to Pay Loan –** Use this calculator ro determine how many months it will take to pay off a loan if you comment to paying a fixed amount each month at a fixed interest rate.
- **Savings Goal –** This will tell you how much you need to save each month to reach a specific goal amount based on the number of years and fixed interest rate.
- **Future Value –** Use this calculator to determine how much your monthly investments will be worth at a fixed fate after a specific number of years.

Loan Amortization Example

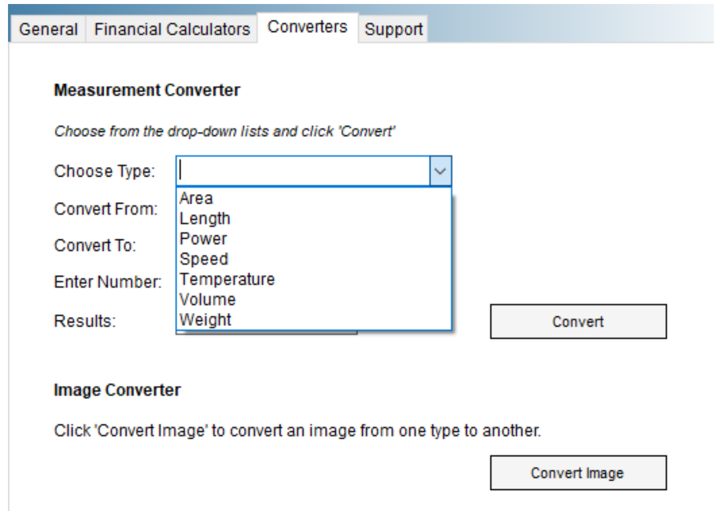
Amortization Schedule

Loan Amount: 15,000.00
Annual Interest Rate: 5.00%
Number of Years: 3
Term (Months): 360
Total Payments: 16,184.16
Total Interest: 1,184.18
Monthly Payment: 449.56
Ending Balance: 0.00

#	Payment	Principal	Interest	Loan Balance
				15,000.00
1	449.56	387.06	62.50	14,612.94
2	449.56	388.68	60.88	14,224.26
3	449.56	390.30	59.26	13,833.96
4	449.56	391.92	57.64	13,442.04
5	449.56	393.55	56.01	13,048.49
6	449.56	395.19	54.37	12,653.30
7	449.56	396.84	52.72	12,256.46
8	449.56	398.49	51.07	11,857.97
9	449.56	400.16	49.40	11,457.81
10	449.56	401.82	47.74	11,055.99
11	449.56	403.50	46.06	10,652.49
12	449.56	405.18	44.38	10,247.31
13	449.56	406.87	42.69	9,840.44
14	449.56	408.56	41.00	9,431.88
15	449.56	410.26	39.30	9,021.62
16	449.56	411.97	37.59	8,609.65
17	449.56	413.69	35.87	8,195.96
18	449.56	415.41	34.15	7,780.55
19	449.56	417.14	32.42	7,363.41
20	449.56	418.88	30.68	6,944.53
21	449.56	420.63	28.93	6,523.90
22	449.56	422.38	27.18	6,101.52
23	449.56	424.14	25.42	5,677.38
24	449.56	425.91	23.65	5,251.47
25	449.56	427.68	21.88	4,823.79
26	449.56	429.46	20.10	4,394.33
27	449.56	431.25	18.31	3,963.08
28	449.56	433.05	16.51	3,530.03
29	449.56	434.86	14.70	3,095.17
30	449.56	436.67	12.89	2,658.50
31	449.56	438.49	11.07	2,220.01
32	449.56	440.31	9.25	1,779.70
33	449.56	442.15	7.41	1,337.55
34	449.56	443.99	5.57	893.56
35	449.56	445.84	3.72	447.72
36	449.56	447.70	1.86	0.02
TOTALS:	16,184.16	14,999.98	1,184.18	

Converters

Measurement Converter

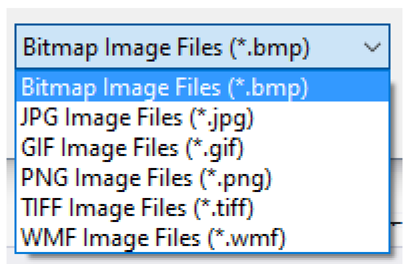


The **Measurement Converter** will convert Area, Length, Power, Speed, Temperature, Volume and Weight measures from imperial (feet, inches) to metric (meters, millimeters, etc.), or any combination of either (feet to inches, square feet to acres, etc.).

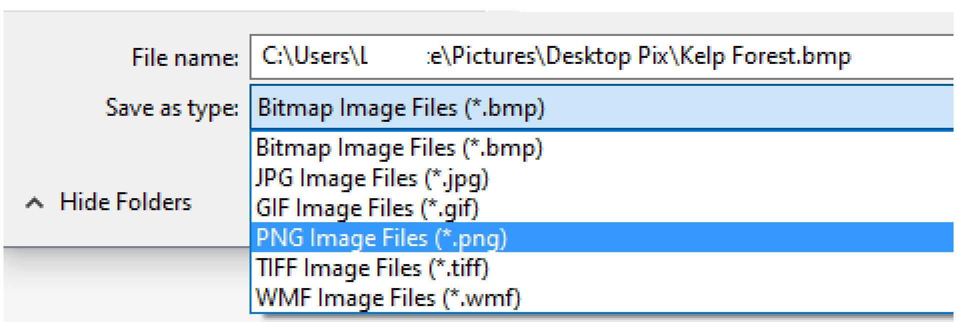
Choose the Type of conversion, the From and To types and enter the number of the From type.

Image Converter

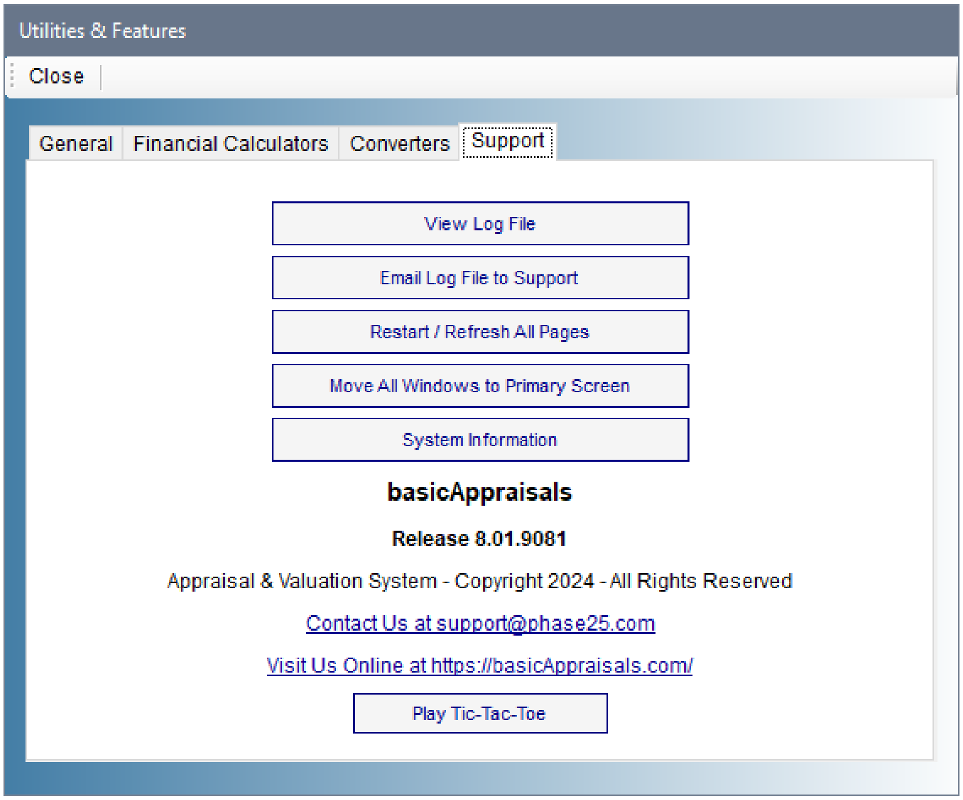
The Image Converter will convert a image file from one format to another. Click the **Convert Image** button and choose one of these file types from the drop-down list on the **Open Dialog** list:



The **Save As** Dialog will let you choose the type to convert it to and where to save it.



Support Information



All Support options are available on the **Support** tab.

- **View Log File** – Any errors that may occur get logged into a text file in your My Documents\<application name> folder. This is helpful when troubleshooting a problem or when communicating with Support.
- **Email Log File to Support** – This option is enabled IF you use Outlook and have the **Yes! I have Outlook** checkbox checked in **Preferences.** Click this to attach your log file to a new email message to send to Phase25 support.
- **Restart/Refresh All Pages** – This is the same as closing and reopening the application. If for any reason you lock up a page and cannot close it, this will close all of the pages in your application automatically.
- **Move All Windows to Primary Screen** – Ever lost a window? If you use more than one monitor and you move a window to the non-primary monitor and then close it, it will always re-open in that same location. If you switch monitors, or unplug the non-primary monitor, the window opens (you can see it on your Taskbar), but you cannot get to it. Click this button to move ALL of the application windows to the primary monitor.
- **System Information** – This generates a text file that lists all of your hardware and software information. If you're working with Technical Support, you may be asked to generate and email this file to thm.
- **Application and Version Information** – The name of your application and the current version and release.
- **Contact Links** – Click a link to contact Support!
- **Play Tic-Tac-Toe** – Can you beat your computer in a simple game of Tic-Tac-Toe? Go ahead…. The computer will keep score!

System & User Requirements

Phase25 Software (Phase25, LLC) products are designed to be straightforward and easy to use, with minimal administration by the customer, both on a hardware and software level. We strive to quickly resolve any and all issues regarding installation, performance and daily usage; however following these standard Requirements must be met before we can effectively do so.

General User Requirements

- Users must have an overall general understanding of how to use a computer, including but not limited to*:
  - Basic Windows skills, such as copy/paste functions and file & folder navigation in Windows Explorer
  - General Outlook email familiarity to adjust personal settings (Outlook Rules & Alerts & Mail Account settings)

User (Workstation) Hardware Requirements

- Operating Systems: Windows 10, Windows 11 (please make sure all updates and service packs are applied regularly)
- MINIMUM 8GB RAM (12GB+ Suggested). More RAM results in better performance.
- 10MB Hard Drive Space for setup and installation; additional storage required for database
- Video Resolution Minimum of 1280 x 800 (100% Resolution); settings that vary from the default proportions for your system may cause some pages to appear distorted
- Microsoft Outlook 2016 or Office 365 (for email integration & user-to-user Replication)
- High-Speed Internet Connection (for updates, remote support & user-to-user Replication)
- Other computer hardware less than 3 years old.

NOTE: All single-user licensed applications store data in a SQLite database, which is a standalone database engine widely deployed in web browsers, operating systems mobile phones and desktop systems. This database type is called *zero-conf*, which means it needs no administrative services.

Enterprise Software Requirements

Enterprise versions support multiple users by adding features such as SQL Server / SQL Server Express integration. Contact support for pricing and additional information at www.phase25.com.

For multiple user customers, we require that **one person** from within your company be designated as the Contact Person for exchanging information about updates, support issues, and any other communication with Phase25 Software regarding the training, installation and general daily operations of the software product. We do not support each user on a one-to-one basis in multi-user situations; the Contact Person within the company is responsible for mitigating on-site issues and communicating those personally to the support staff at Phase25 Software and then reporting any resolutions, update notices, etc., to the licensed users within the company.

- Supported Database Platforms (Enterprise)
  - Microsoft SQL Server 2016 or above - requires SQL Server installed and operating on a company network and is NOT included in our software packaging, installations or pricing.
  - Microsoft SQL Server EXPRESS 2014 - requires SQL Server Express 2014, which is a free product available from Microsoft's website (https://www.microsoft.com/en-US/download/details.aspx?id=42299).
  - We recommend downloading and installing the SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to Microsoft documentation for system requirements for their products.*
- Replication Requirements (Enterprise)
  - Microsoft Outlook 2016 or above or Office 365
  - High-Speed Internet Connection
  - For Replicator Server Utilities - Windows Server NOT required (Replicator can run on a workstation); however the workstation should be an up-to-date computer with a minimum of 16GB of RAM to efficiently process replication packages for client systems.

*We provide instructions for setting up an application role login and password on SQL servers, however, we do not support the overall operations of any SQL Server products as that is the responsibility of the vendor from which it was purchased.

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