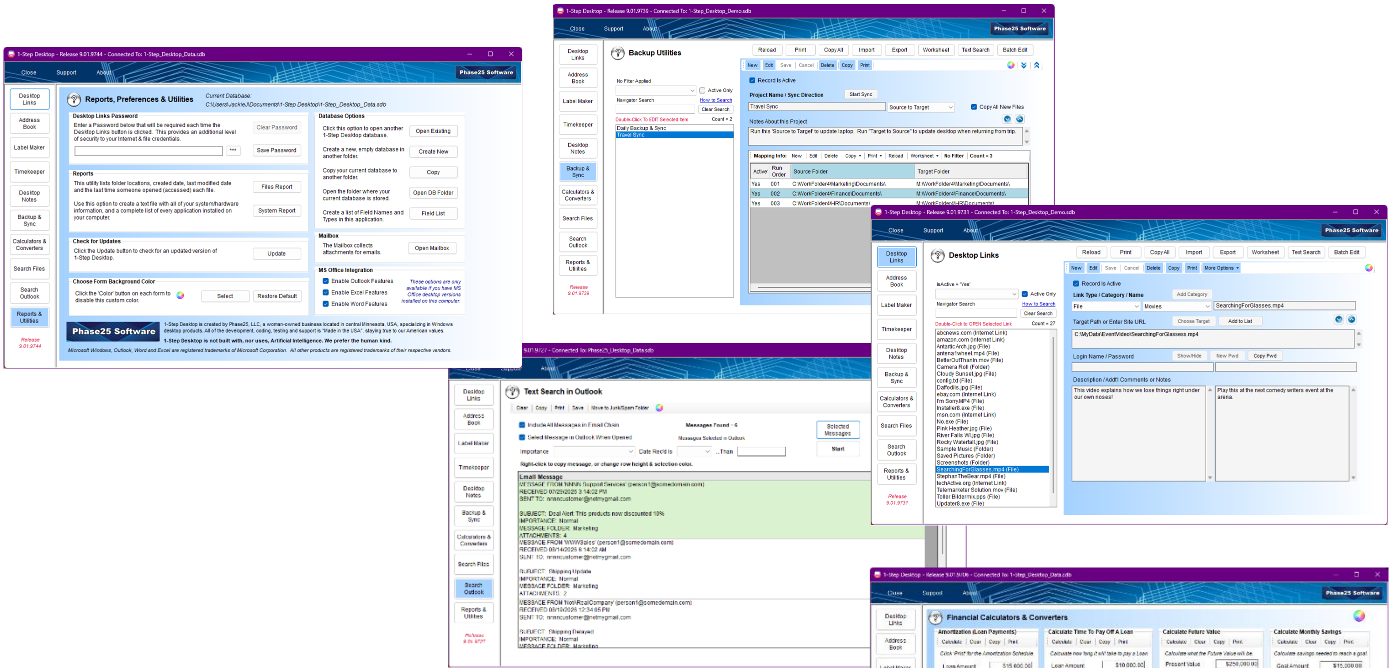
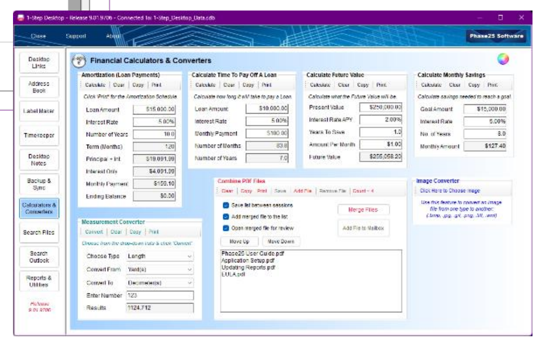


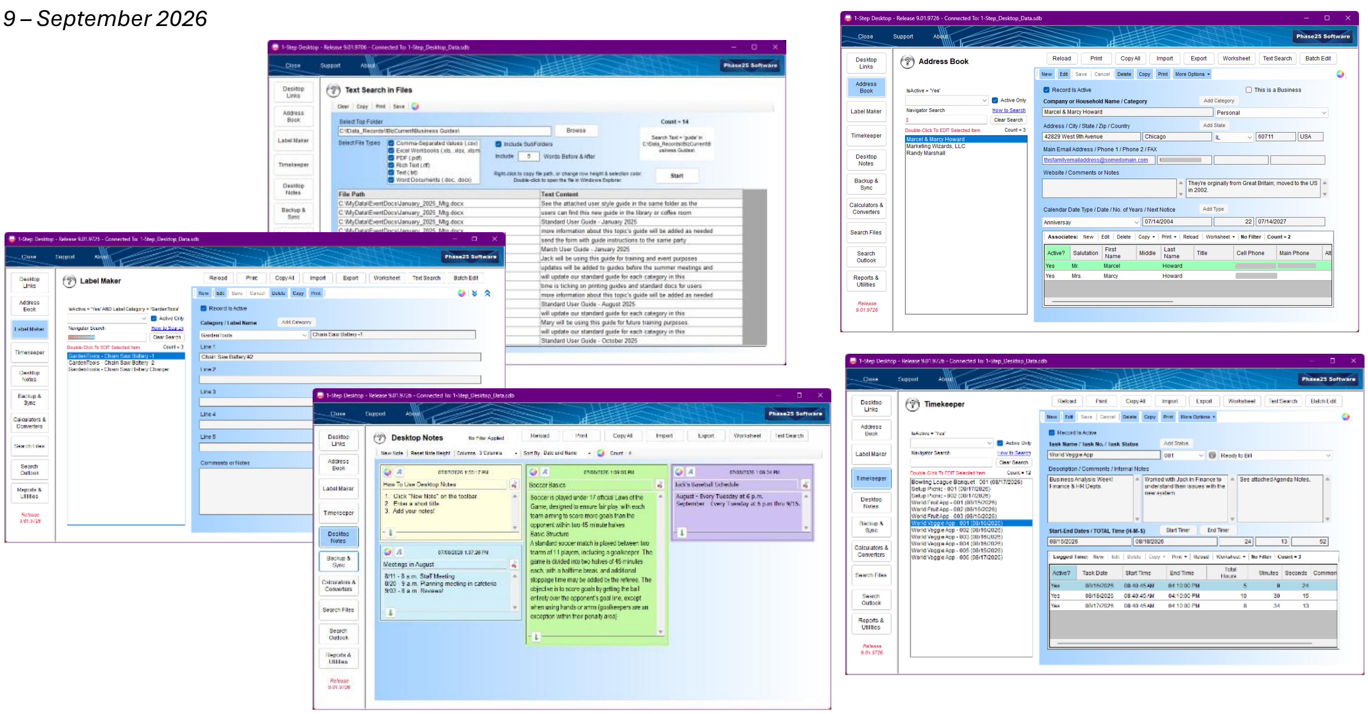


1-Step Desktop

User Guide

Windows(R) Desktop Software from Phase25, LLC

Version 9 – September 2026



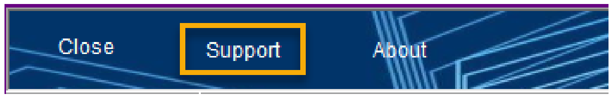
Phase25

Home Office / Small Office
Business Software

Table of Contents

Introduction

This guide is a resource for users of 1-Step Desktop, Version 9.x. Click on the Support link on the top of the page to visit our website for FREE video tutorials and additional information.



What Is 1-Step Desktop?

1-Step Desktop a complete collection of Windows Desktop utilities all in one simple, easy-to-use application.

Use these features to store the information you use every day:

- Desktop Links – File, folder and internet links & password manager. Clears your desktop of all shortcuts!
- Address Book – Simple contacts manager; store company and personal info, print labels.
- Label Maker – Stores & prints any one-off labels (for file folders, boxes, etc.)
- Timekeeper – Logs time (hour, minutes, seconds) you spend on any project.
- Desktop Notes – Like Windows Sticky Notes, but all on one screen.

These utilities perform a number of common tasks:

- Backup & Sync – Backup folders or synchronize between computers.
- Calculators & Converters – Financial calculators, measurement & image converters
- Text Search in Word, Excel, PDF and Text files – How do you find a document based on some text in it? This text search looks INSIDE of these file types.
- Text Search in Outlook – Full text search for any messages in any folders in Outlook.
- System Reports – 1) Lists all folders and files on your computer, including file sizes, Created, Last Modified and Last Accessed dates and times for each one. 2) What's on your computer? This report will list all hardware and installed application information.

1-Step Desktop is fully integrated with Microsoft Office 2016 (or higher) or Office 365 DESKTOP VERSIONS (not web). If you do not have Office installed on your computer, some features will be disabled.

Click here to review these requirements.

You can check for updates any time by clicking the **Update** button on the **Reports & Utilities** page. All updates are FREE for licensed users!

How to Use This Guide

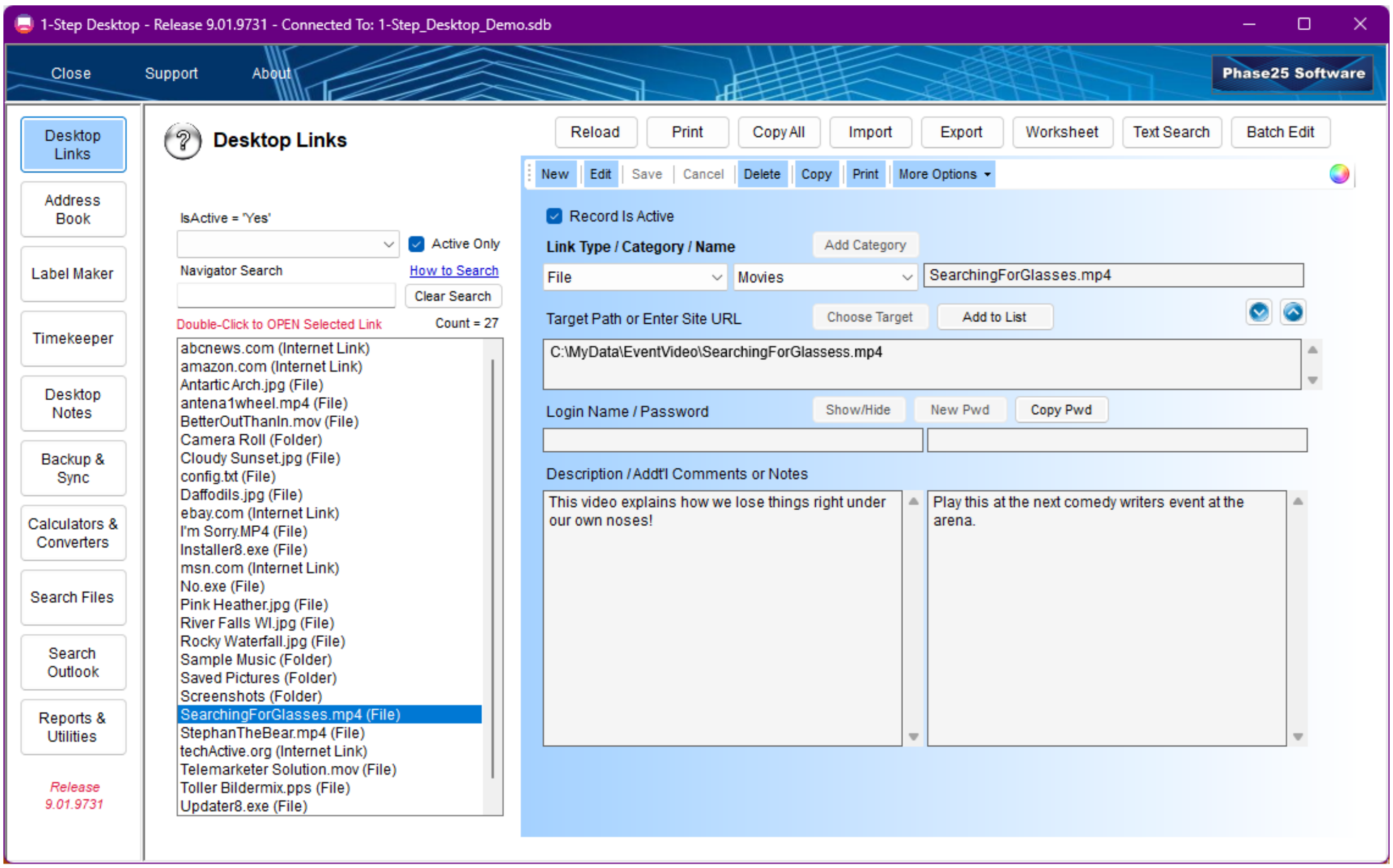
The information in this guide is arranged in the same order as the 1-Step Desktop toolbar on the left side of the Main page. Note that you can click on any item in the Table of Contents to jump to the page with that topic.

Desktop Links

Overview

Desktop Links is a simple password management system for all of your websites. **Desktop Links** can create safe, 20-character passwords that you don't ever have to remember. To open a website double-click on the name of the link in the list. The password is copied to the Windows clipboard for 30 seconds and the website opens. Enter your user name, and click in the password field and use Ctrl+V to paste in your password. Every website can have a unique, safe password and a unique name that makes sense to you (instead of just the URL).89

Desktop Links is also an organization utility for all file and folder shortcuts on your computer or network. You simply select the file or folder and give it a meaningful name, then save it! When you want to open the file or folder, just double-click on the name to open it. If the file is password protected, your password will be copied to the Windows clipboard for 30 seconds.



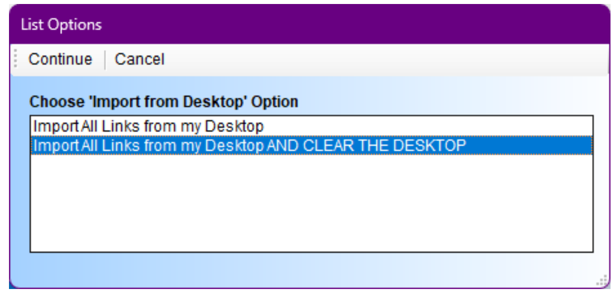
Links are organized and can be filtered by type (File, Folder, Internet Link). You can also group LInks by a common Category, add a Description and even Comments about it.

If your desktop is currently loaded with dozens of shortcuts for websites, files and folders, simply click on **Import >> Import from Desktop** to move all shortcuts into **1-Step Desktop**, instantly clearing your desktop and organizing those shortcuts by Type and Category. See the next section for details.

The next topics in this section refer to the unique features of **Desktop Links**. For general information about how to add and edit records see the section called **Common Features**.

Adding Shortcuts to Desktop Links

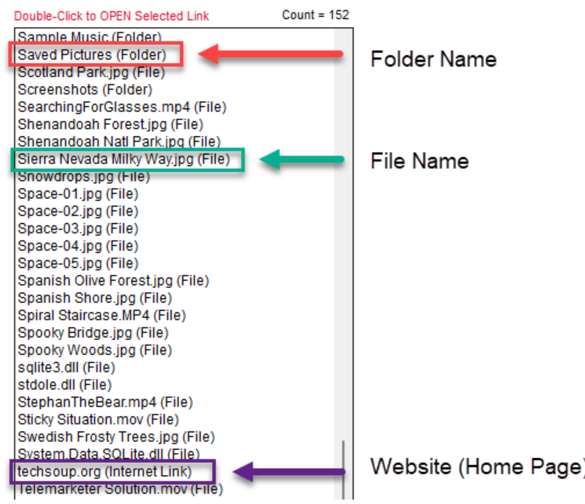
If your desktop is currently loaded with dozens of shortcuts for websites, files and folders, **Desktop Links** can easily clear that collection of links and organize them by simply clicking the **Import >> Import from Desktop** option on the **Button Toolbar**. You can use this utility any time you find you've collected more shortcuts that need to be moved into **Desktop Links**.



When you click the button you can choose to import all shortcuts into **Desktop Links** and leave the shortcuts on your desktop, or to remove them from your desktop.

Click on the option you want to use, then click **Continue** to import the shortcuts.

What Happens When You Import Shortcuts

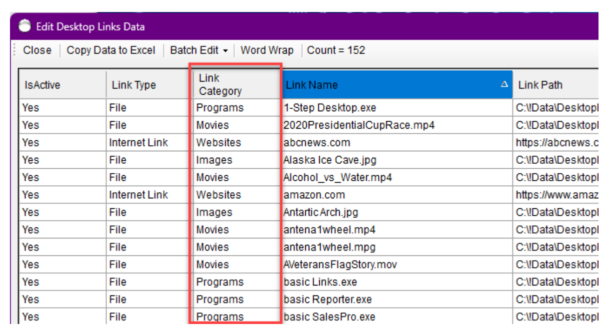


This utility only takes a few seconds. When it's done, you will see the Navigator filled with all of the shortcuts which have been "Typed": Folder, File, Internet Link. These Type values are added to each name in the Navigator to make it easier to distinguish what kind of link it is.

The Name of each record defaults based on the Type:

- **Folder** – The last folder in the selected directory (example: C:\!Data\DesktopData\Saved Pictures)
- **File** – the actual file name and its extension (example: Sierra Nevada Milky Way.jpg)
- **Internet Link** – The main page of the website (example: techsoup.org)

The **Link Category** fields are also filled with default values, based on the Type. Folders are named **Work Folders,** Internet Links are named **Websites**, and Files are further categorized by their file types.



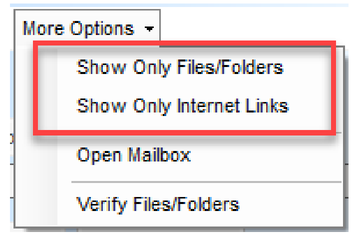
IsActive	Link Type	Link Category	Link Name	Link Path
Yes	File	Programs	1-Step Desktop.exe	C:\!Data\Desktopl
Yes	File	Movies	2020PresidentialCupRace.mp4	C:\!Data\Desktopl
Yes	Internet Link	Websites	abcnews.com	https://abcnews.c
Yes	File	Images	Alaska Ice Cave.jpg	C:\!Data\Desktopl
Yes	File	Movies	Alcohol_vs_Water.mp4	C:\!Data\Desktopl
Yes	Internet Link	Websites	amazon.com	https://www.amaz
Yes	File	Images	Antartic Arch.jpg	C:\!Data\Desktopl
Yes	File	Movies	antena1wheel.mp4	C:\!Data\Desktopl
Yes	File	Movies	antena1wheel.mpg	C:\!Data\Desktopl
Yes	File	Movies	AVeteransFlagStory.mov	C:\!Data\Desktopl
Yes	File	Programs	basic Links.exe	C:\!Data\Desktopl
Yes	File	Programs	basic Reporter.exe	C:\!Data\Desktopl
Yes	File	Programs	basic SalesPro.exe	C:\!Data\Desktopl

- **Folder** – Named **Work Folders**
- **File** – Named based on the type of each file (by file extension):
  - ".url", ".html", ".mhtml" = **Websites**
  - ".exe", ".bat" = **Programs**
  - ".mpg", ".mp4", ".mov", ".avi", ".wm", ".flv", ".mkv", ".webm", ".vob" = **Movies**
  - ".xls", ".xlsx", ".xlsm", ".xlsb" = **Excel Workbooks**
  - ".doc", ".docx", ".docm", ".dot", ".dotm", ".rtf" = **Word Documents**
  - ".pdf" = **PDF Files**
  - ".dbf", ".mdb", ".accdb", ".sdb", ".sqlite" = **Databases**
  - ".jpg", ".gif", ".png", ".ico", ".tif", ".tiff", ".wmf", ".bmp", ".jpeg", ".jpe", ".jfif", ".heic", ".hif", ".dib" = **Images**
  - ".txt", ".tsv", ".csv" = **Text Files**
  - ".pps", ".ppsx", ".ppt", ".pptx", ".pptm", ".potx", ".potm", ".pot" = **PowerPoint Presentations**
  - All other types = **Work Files**
- **Internet Link** – Named **Websites**

You can edit any of these default values or use the Worksheet Batch Editing feature to change multiple records at one time.

Filtering Desktop Links

The **Link Type** field is not editable; if you try to edit and change a Link Type the change will be rejected. This is because **Desktop Links** needs to know what kind of link it is in order to open it when you double-click on the name in the Navigator. The only time you can select a Link Type is when you are creating a new record.

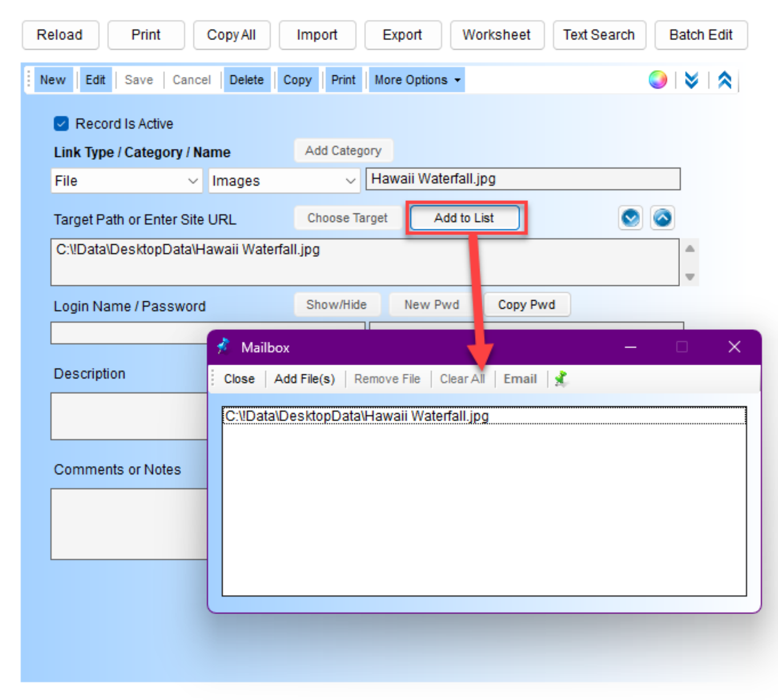


However you can filter the Navigator by the Link Type field by choosing it from the Filter Fields, and then picking one of those three types.

There are also two Filters on the **More Options** menu on the Record Toolbar, called **Show Only Files/Folders** and **Show Only Internet Links**. These are preprogrammed "quick-filters" that will be applied to the Navigator without going through the Filter Field dropdown list.

The **Link Category** field values can be edited individually on the record's form, or by one of the Batch Edit options. See the sections called Batch Edit and Worksheet Batch Editing for more information on field editing. You can change the Category values to whatever makes sense to you. For example: If a group of files is part of a specific project or task, change the Category for each of them to the Project/Task name. Then you can filter the Navigator by that name to find just those files.

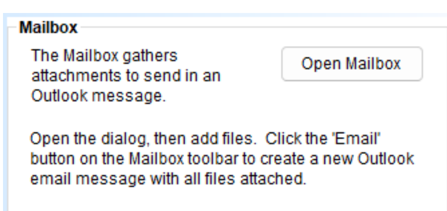
The Mailbox



The **More Options** menu on the **Record Toolbar** has additional functionality for working with **Desktop Links**. If you have Microsoft Outlook DESKTOP Version (also called **Classic**), you will see **Open Mailbox**, which opens the **Mailbox** dialog. This lets you gather a list of attachments that you want to add to an Outlook message. This is available only when a **File** Link Type record is displayed.

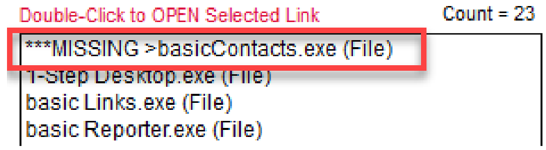
You can also open this dialog and add the file currently displayed on the form by clicking the **Add to List** button.

This feature is also available from the **Reports & Utilities** page:



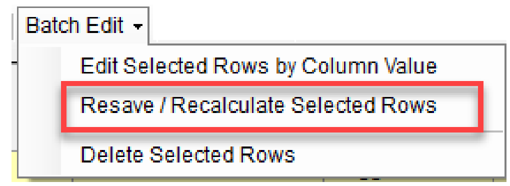
Move the dialog to another screen or portion of your desktop and keep adding files until you have them all gathered. When you're ready to create the email, click the **Send** button on the dialog toolbar and a new Outlook message will be created and opened with all of the files attached.

Verify Files & Folders



Clicking the Verify Files/Folders option on the More Options menu will analyze every File and Folder Type record and validate the path to each. If a file or folder is not found, the name in the Navigator will be preceded by the this text: ***MISSING >, which will bring the name to the top of the Navigator list.

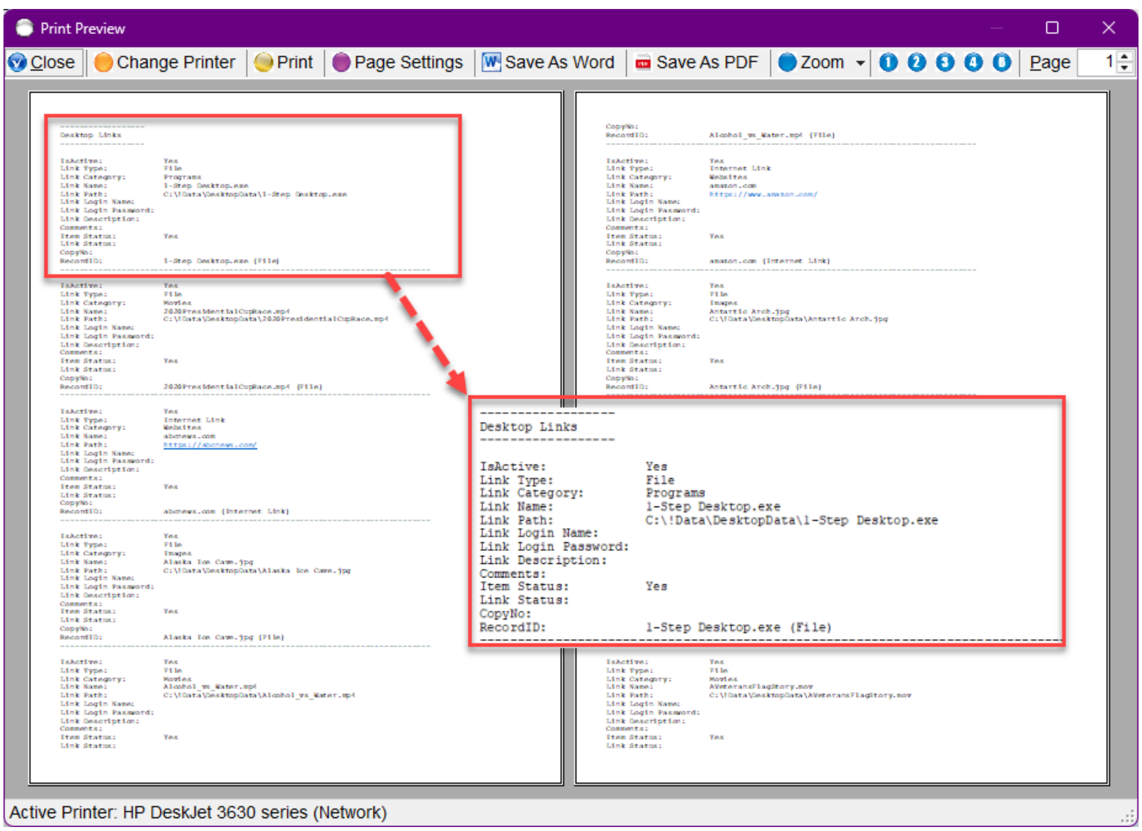
When you see a name in the Navigator with this text, you should edit the record and reestablish the connection or path to the file or folder. When the record is saved and the path is correct, this text will be removed from the Navigator name.



To check all Files and Folders in Desktop Links, clear all filters, then open the Worksheet, select all records (Ctrl+A) and run the **Batch Edit >> Resave / Recalculate Selected Rows** utility. When each row is recalculated it will check that the path is correct.

Printing Desktop Links

Click the **Print >> Print Report** buttons to display all records in the Navigator in the Print Preview window:



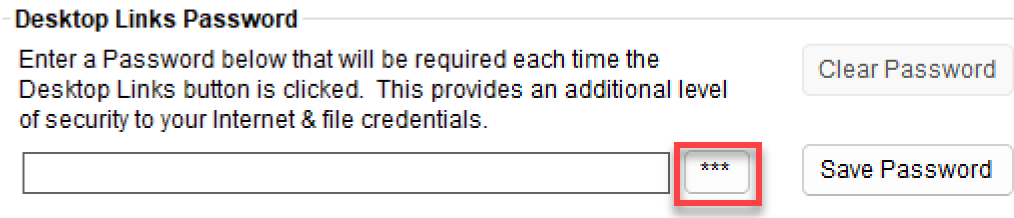
Copying Desktop Links

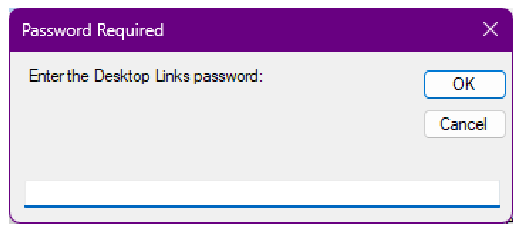
When you click the **Copy All** button on the **Button Toolbar**, the data is formatted the same as it is for the Printed report (above). You can paste this information into an email message or Word document or other text application for additional formatting and distribution.

Desktop Links Password

There's an option on the **Report & Utilities** page called "Desktop Links Password", which lets you define a password that will be required when you click the **Desktop Links** button on the Main Menu. If you have other users on your computer and want to protect your logins and passwords, adding this step will prevent anyone who cannot enter the password from opening the Desktop Links page.

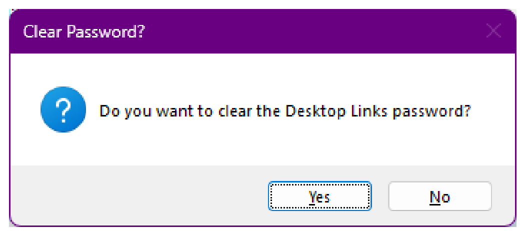
Adding the Password





Enter the password (click the *** button to show or hide it as you enter it), then click **Save Password**. The next time you try to open Desktop Links you will be prompted to enter it. If not entered correctly (it IS case-sensitive) you will not be able to open the page.

Clearing the Password



The **Clear Password** button on **Reports & Utilities** will only be enabled for the same person who added the password based on that person's Windows login name.

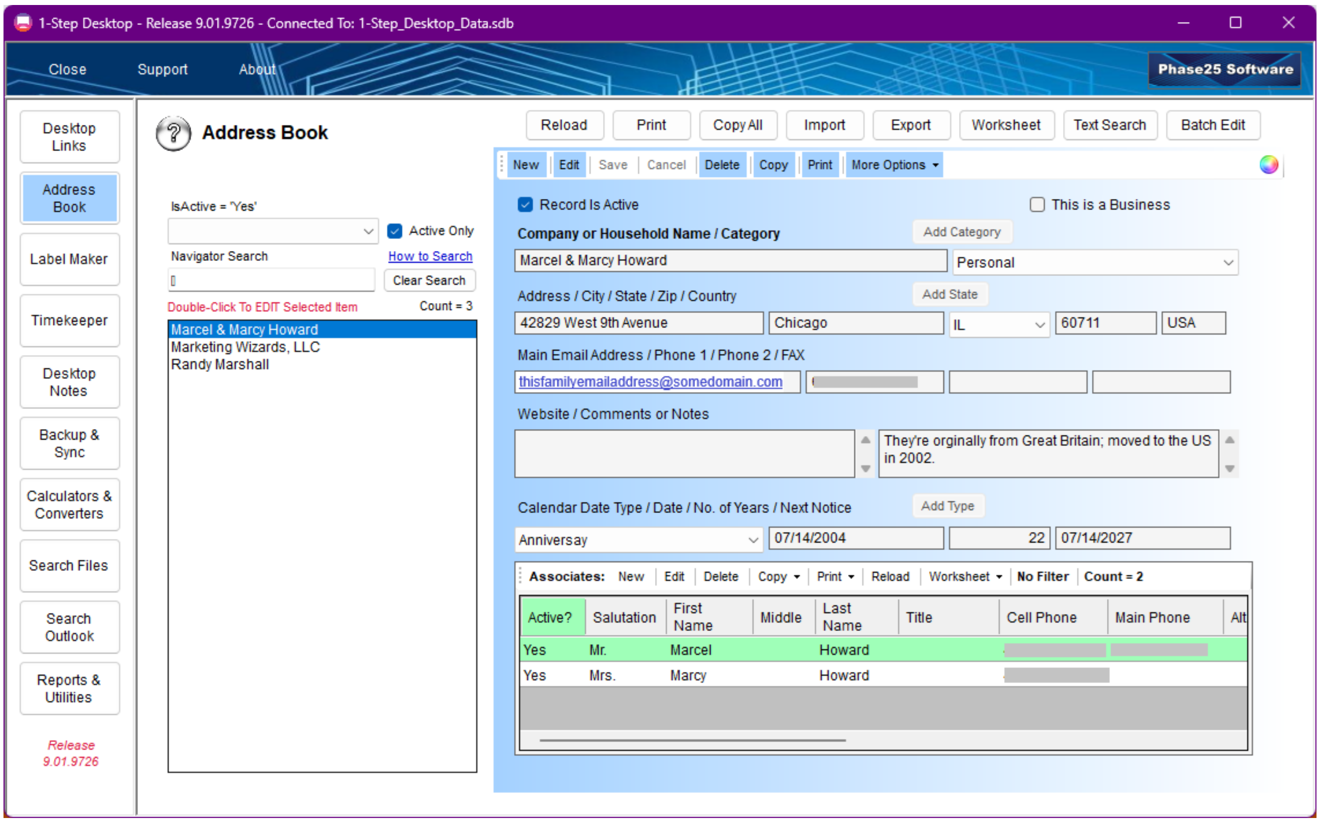
If you are the same person, answer **Yes** to the first prompt and enter your password in the second prompt. The password will be cleared and Desktop Links will be open to everyone.

Address Book

Overview

The **Address Book** is a one-stop application for managing all “people and places” data. The **Address Book** table can replace your paper address book or desktop rolodex or other sources of contact information because you can mark and categorize them by one or more of the optional fields. For example, maybe you want to keep your Christmas list; just add a Contact Type for “Holiday List” and mark each of those people with that type. Then you can filter by that value to find just those records when needed.

The next topics in this section refer to the unique features of **Address Book**. For general information about how to add and edit records see the section called Common Features.



How Do I Use This?

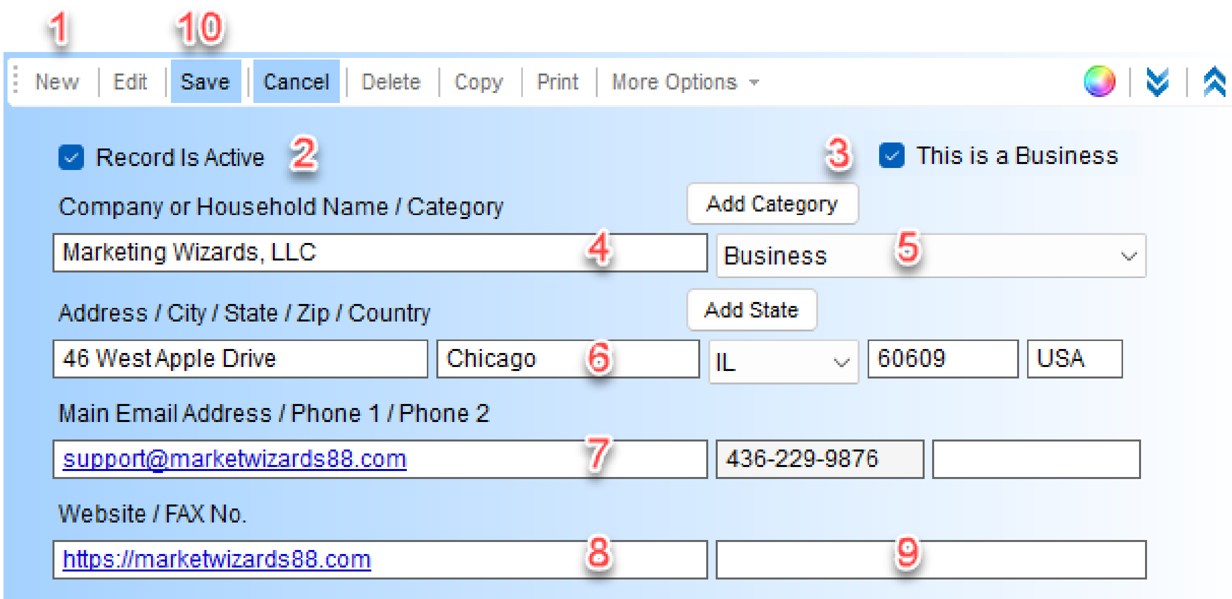
This Address Book is designed to record many forms of information. The fields at the top can be used to add a Company location and the **Associated People** worksheet at the bottom can then store information about the people who work there.

In the example above you see a “household” entry: This is a family Contact record, and the individuals who live there are added with their personal cell phones and birth dates (more on that coming up!).

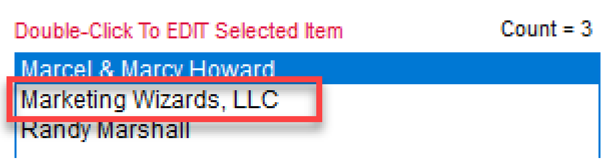
See the next sections for examples of managing these contacts like these.

Example #1 – Adding A Company

This example will show you how to add Company information in the Address Book.



1. Click **New** on the toolbar. This clears all fields and prepares to add a new entry.
2. Note that the **Record Is Active** checkbox is automatically checked.
   a. This field is used for filtering; you could keep "old" information that you don't use but still don't want to delete by unchecking this box and then filtering the Navigator by checking the **Active Only** checkbox at the top of the Navigator.
3. Check the **This is a Business** checkbox, which gives you another way to filter the Navigator.
4. Enter the **Company Name** in the first field.
5. Select the **Category** from the drop-down list, or add a new one that you can use to filter records logically when printing labels or reports.
6. Enter the company **Address** and **City**, select the **State** from the drop-down list. Add the **Zip Code** & **Country**.
   a. NOTE: If you are entering the same value over and over again (like the State or Country), enter it once, then right-click on the field and choose **Set Default Value** from the popup menu. Each time you add a new record that field will automatically fill in that value.
   b. You can clear a Default Value by clicking the **Clear Default Value** on the right-click popup on any field.
7. Enter the company's **Main Email Address**, and the **Main Phones**. None of these are required.
8. Enter the company **Website** URL (Address).
   a. When entered, you can simply double-click on the text to open the website without editing the record.
9. Enter a **FAX Number** if they have one.
10. Click **Save** on the toolbar to save your entry so far. You should see the Company Name in the Navigator.

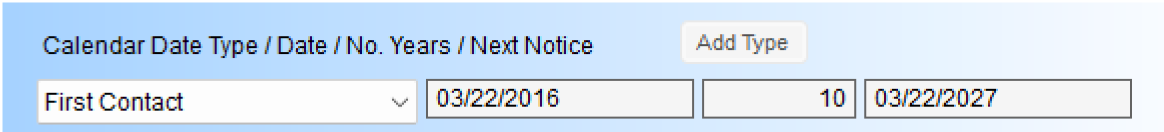


The next section will describe how the Date fields can be used. Click the **Edit** button on the Record Toolbar or double-click on the name in the Navigator to open the form for editing.

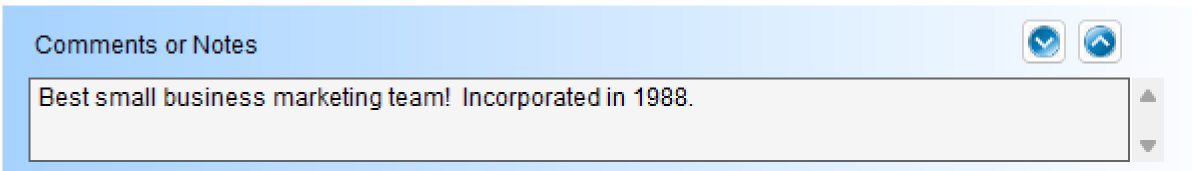
The Company Date Fields

11. Each **Address Book** record has a field that can be used to store a "first contact" date with the Company. The fields used for this purpose are:

a. **Calendar Date Type** – This field is used to filter the Address Book when you print a calendar. In this example we added at Type called "First Contact", but you could call this anything you want.
b. **Date** – enter the date of first contact: "03/22/2016". Or double-click in the field to popup a Calendar.
c. The **No. (of) Years** and **Next Notice** fields are automatically calculated when you change the **Date** field.

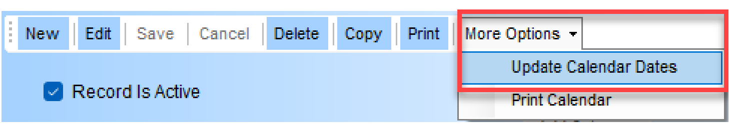


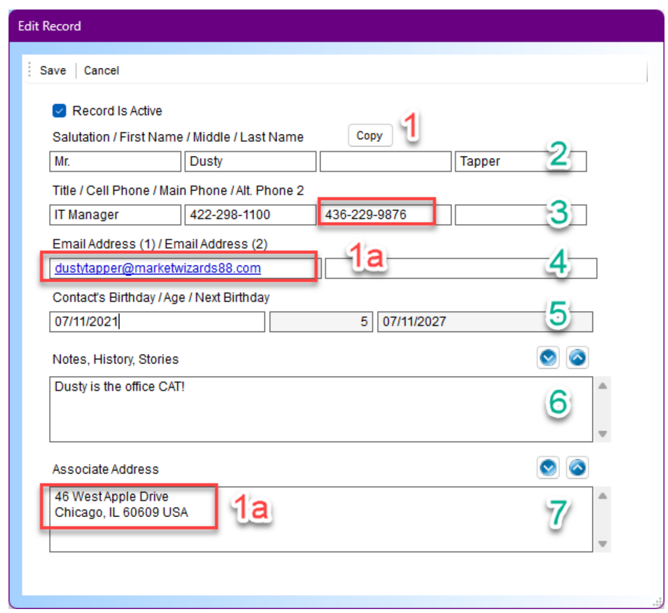
12. The **Comments or Notes** field is open text where you can enter as much information about this company as you want. As with all text fields, double-click in it to open a larger edit window, then click **Continue** on the toolbar to close the window and copy your changes back to this field.



13. Click **Save** again to save the Company information you have entered.

Important: The two calculated Calendar fields only update when an Address Book record is edited, so those **No. (of) Years** and **Date** fields may not be accurate as time passes. To update all records use the **Update Calendar Dates** button on the More Options menu which will update ALL Address Book and Associated People records you have entered.





Adding Company Employees & Associates

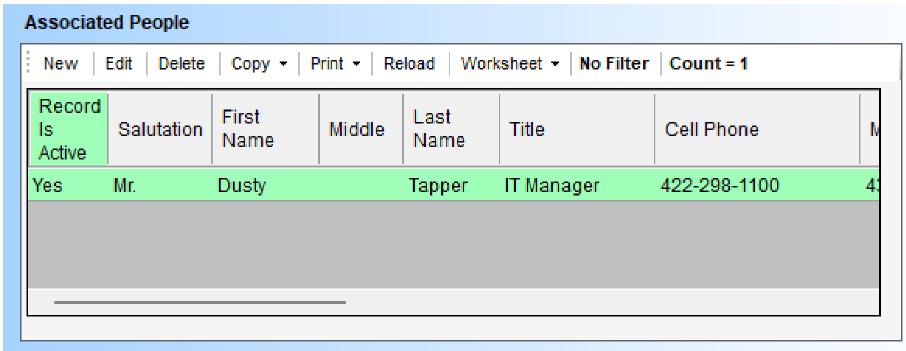
At the bottom of the Address Book form is a small worksheet which will allow you to add as many people as are associated with this company. Click **New** on the worksheet toolbar to create a new record. The form will open with all empty fields.

These are the steps for adding an Associate record:

1. If you think that most or at least some of the Company information is the same for this person, click the **Copy** button above the name fields. If you checked the **This is a Business** checkbox, the Company name will NOT be copied. You can edit any of these values as needed.
    a. In this example the **Main Phone** number, **Email Address** and full **Address** are copied.

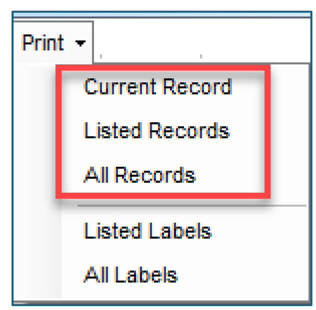
2. On the first row of fields, add the **Salutation, First, Middle and Last Names**.
3. Add the person's **Title** on this line, their **Cell Phone** and their direct line number in the **Alt. Phone 2** field.
4. The Company's primary email address is automatically copied, but if the associate has a personal address, replace it with their own.

5. The **Contact's Birthday / Age / Next Birthday** fields work the same as the Company's Date fields except here is where you can enter the Person's birth date. When you do, their current **Age** and **Next Birthday** values are calculated and added automatically.
6. Enter any information you want to keep in the **Notes, History, Stories** field.
7. The **Associate's Address** field will be copied from the Company address when you clicked the **Copy** button (see #1). You can change it here to their home location if you want.
8. Click **Save** on the toolbar to save this information and close the form. You will see this record now in the Worksheet at the bottom of the Company form.

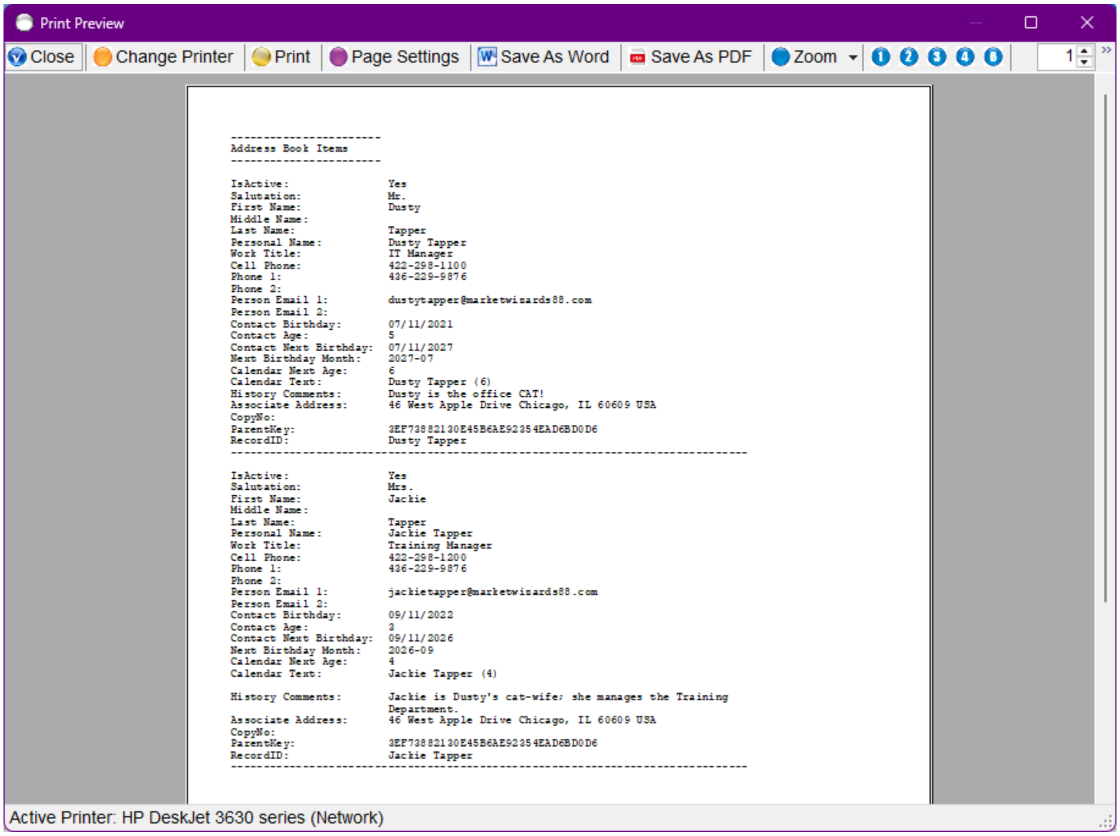


9. Use the scroll bars on the Worksheet to see all of the columns and **double-click** on the row (or click on the row and click on **Edit** on the toolbar) to edit the record. These are the buttons on this Worksheet's toolbar:
   a. **Copy >>**
      i. **Copy Record (New Record)** - This copies the selected record and opens it for editing.
      ii. **Copy Record to Clipboard** – This copies the selected row in this Worksheet into the "Field = Value" format onto the Windows Clipboard.
      iii. **Copy All Records to Clipboard** – This copies all of the rows in this Worksheet into the "Field = Value" format onto the Windows Clipboard.

   b. **Print >>**
      i. **Current Record** - This formats the selected row in this Worksheet into the "Field = Value" text, then displays it in the Print Preview window.
      ii. **Listed Records** - This formats all of the rows in this Worksheet into the "Field = Value" text, then displays it in the Print Preview window.
      iii. **All Records** – This formats ALL Associate records in the database into the "Field = Value" text, then displays it in the Print Preview window.



Example of **ii. Listed Records**:



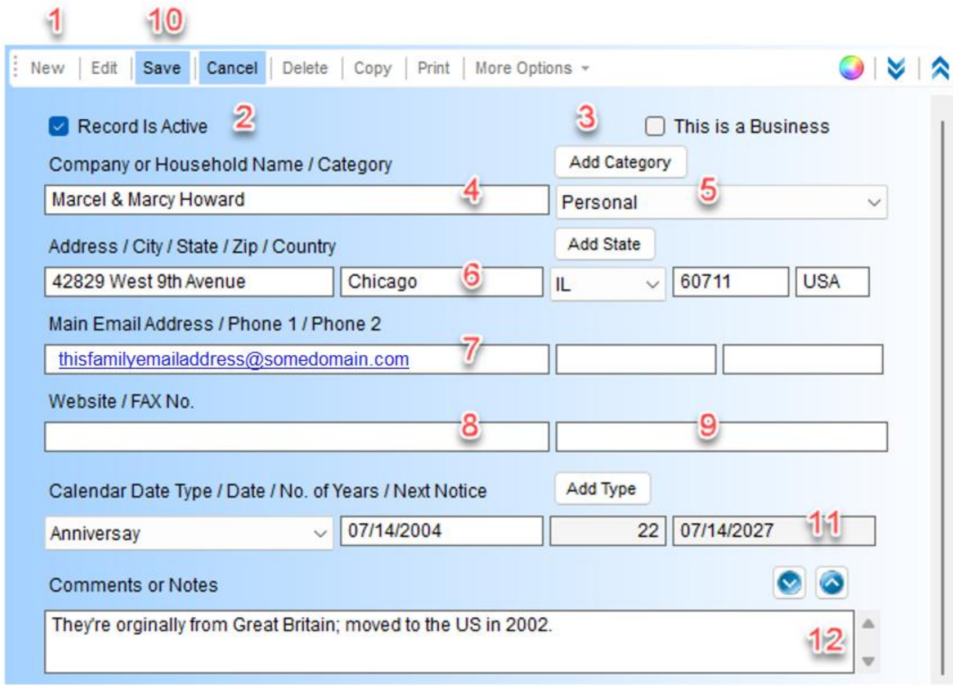
c. Print (continued) >> (See the Label Printer guide for details)

i. **Listed Labels** – This opens the **Label Printer** dialog with the ability to print labels for all of the rows in this Worksheet.

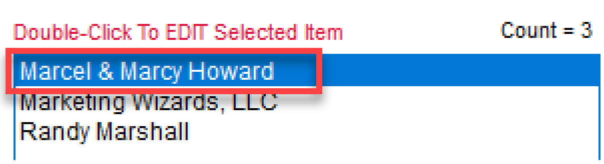
ii. **All Labels** - This opens the **Label Printer** dialog with the ability to print labels for all Associate records in the database.

Example #2 – Adding A Personal Contact

This example will show you how to add personal or household contacts in the Address Book.



1. Click **New** on the toolbar. This clears all fields and prepares to add a new entry.
2. Note that the **Record Is Active** checkbox is automatically checked.
    a. This field is used for filtering; you could keep "old" information that you don't use but still don't want to delete by unchecking this box and then filtering the Navigator by checking the **Active Only** checkbox at the top of the Navigator.
3. Uncheck the **This is a Business** checkbox, which gives you another way to filter the Navigator.
4. Enter the **Person or Persons Names** in the first field.
5. Select the **Category** from the drop-down list, or add a new one that you can use to filter records logically when printing labels or reports.
6. Enter the company **Address** and **City**, select the **State** from the drop-down list. Add the **Zip Code** & **Country**.
    a. NOTE: If you are entering the same value over and over again (like the State or Country), enter it once, then right-click on the field and choose **Set Default Value** from the popup menu. Each time you add a new record that field will automatically fill in that value.
    b. You can clear a Default Value by clicking the **Clear Default Value** on the right-click popup on any field.
7. Enter the **Main Email Address**, and the **Main Phones**. None of these are required.
8. Enter the person(s) **Website** URL (Address), if any.
    a. When entered, you can simply double-click on the text to open the website without editing the record.
9. Enter a **FAX Number** if they have one.
10. Click Save on the toolbar to save your entry so far. You should see the Name in the Navigator.

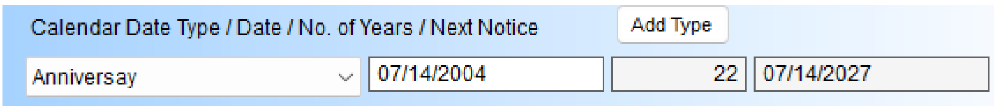


The next section will describe how the Date fields can be used. Click the **Edit** button on the Record Toolbar or double-click on the name in the Navigator to open the form for editing.

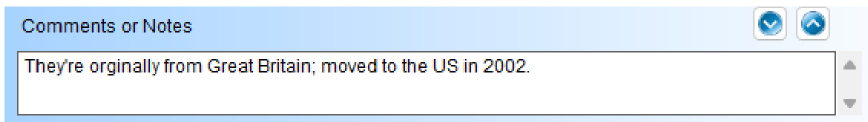
The Calendar Date Fields

Each **Address Book** record has a field that can be used to store a date for tracking the length of a relationship. For example, it might be "High School Graduation" or for a couple, maybe their "Anniversary". The fields used for this purpose are:

- **Calendar Date Type** – This field is used to filter the Address Book when you print a calendar. In this example we added at Type called "Anniversary", but you could call this anything you want.
- **Date** – enter the date of first contact: "07/14/2004". Or double-click in the field to popup a Calendar.
- The **No. (of) Years** and **Next Notice** fields are automatically calculated when you change the **Date** field.

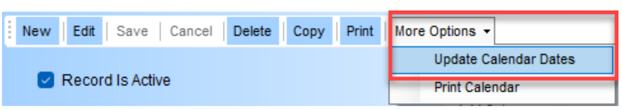


The **Comments or Notes** field is open text where you can enter as much information about this company as you want. As with all text fields, double-click in it to open a larger edit window, then click **Continue** on the toolbar to close the window and copy your changes back to this field.



Click **Save** again to save the information you have entered.

Important: The two calculated Calendar fields only update when an Address Book record is edited, so those **No. (of) Years** and **Date** fields may not be accurate as time passes. To update all records use the **Update Calendar Dates** button on the More Options menu which will update ALL Address Book and Associated People records you have entered.

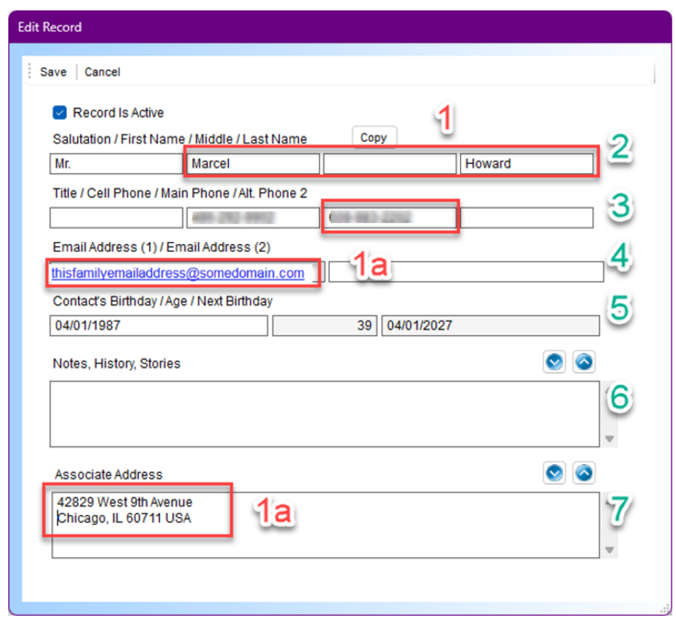


Adding Household Members

The Address Book records stores the information for a single location. However, many people may live in that household and have different contact information.

At the bottom of the Address Book form is a small worksheet which will allow you to add others who live in this location. Click **New** on the worksheet toolbar to create a new record. The form will open with all empty fields.

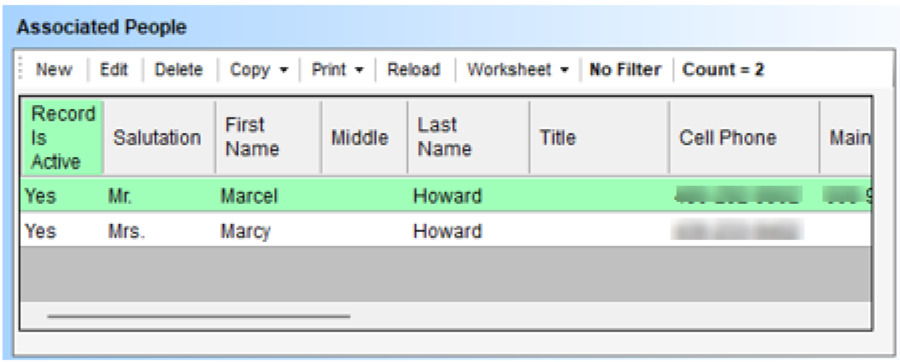
These are the steps for adding an Associate record:



1. If you think that most or at least some of the Company information is the same for this person, click the **Copy** button above the name fields. If you unchecked the **This is a Business** checkbox, the person's name will also be copied. You can edit any of these values as needed.
   a. In this example the **Name, Main Phone** number, **Email Address** and full **Address** are copied.

2. On the first row of fields, add the **Salutation, First, Middle and Last Names**.

3. Add the person's **Title** on this line (if different than the Salutation), their **Cell Phone** and any other phone number in the **Alt. Phone 2** field.
4. The Household's primary email address is automatically copied, but if the associate has a personal address, replace it with their own.
5. The **Contact's Birthday / Age / Next Birthday** fields work the same as the Company's Date fields except here is where you can enter the Person's birth date. When you do, their current **Age** and **Next Birthday** values are calculated and added automatically.
6. Enter any information you want to keep in the **Notes, History, Stories** field.
7. The **Associate Address** field will be copied from the Company address when you clicked the **Copy** button (see #1). You can change it here to another location if applicable. Example, student's college address.
8. Click **Save** on the toolbar to save this information and close the form. You will see this record now in the Worksheet at the bottom of the Company form.



9. Use the scroll bars on the Worksheet to see all of the columns and **double-click** on the row (or click on the row and click on **Edit** on the toolbar) to edit the record. These are the buttons on this Worksheet's toolbar:

   a. Copy >>

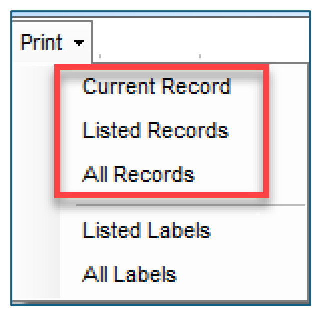
   

   i. **Copy Record (New Record)** - This copies the selected record and opens it for editing.

   ii. **Copy Record to Clipboard** – This copies the selected row in this Worksheet into the "Field = Value" format onto the Windows Clipboard.

   iii. **Copy All Records to Clipboard** – This copies all of the rows in this Worksheet into the "Field = Value" format onto the Windows Clipboard.

   b. Print >>

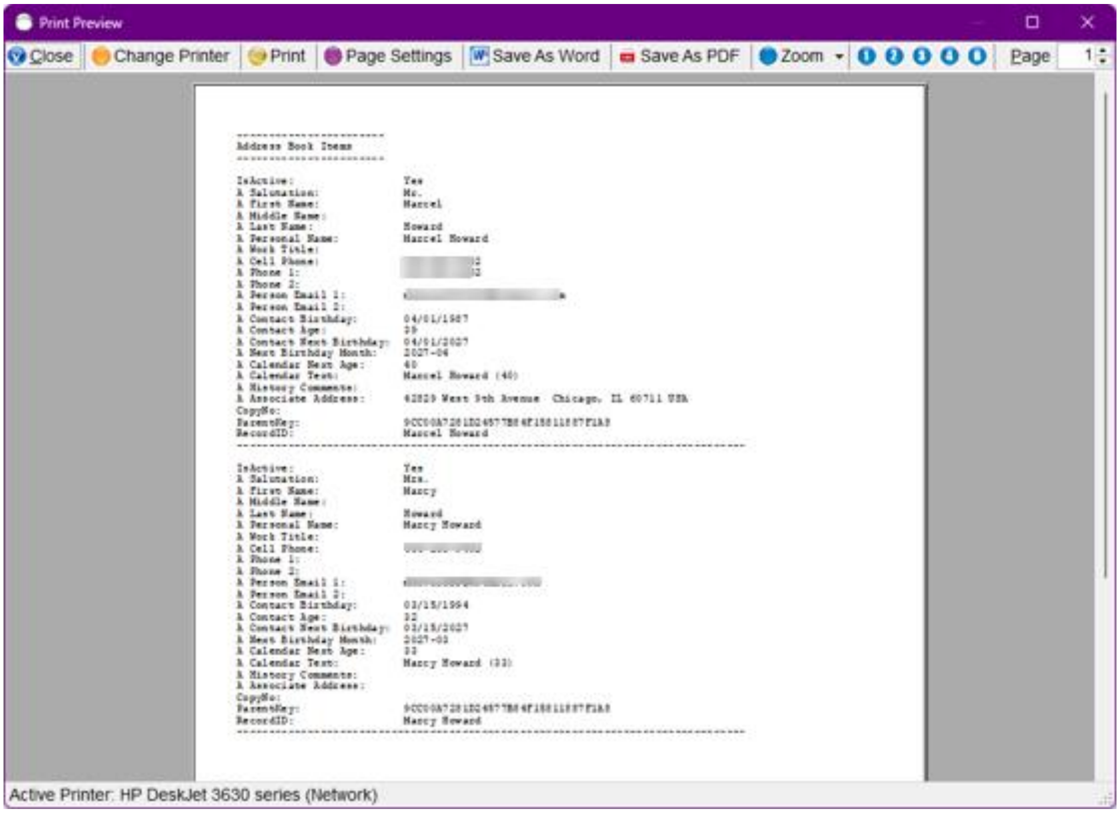
   

   i. **Current Record** - This formats the selected row in this Worksheet into the "Field = Value" text, then displays it in the Print Preview window.

   ii. **Listed Records** - This formats all of the rows in this Worksheet into the "Field = Value" text, then displays it in the Print Preview window.

   iii. **All Records** – This formats ALL Associate records in the database into the "Field = Value" text, then displays it in the Print Preview window.

Example of **ii. Listed Records**:



c. **Print (continued) >>** (See the Label Printer guide for details)

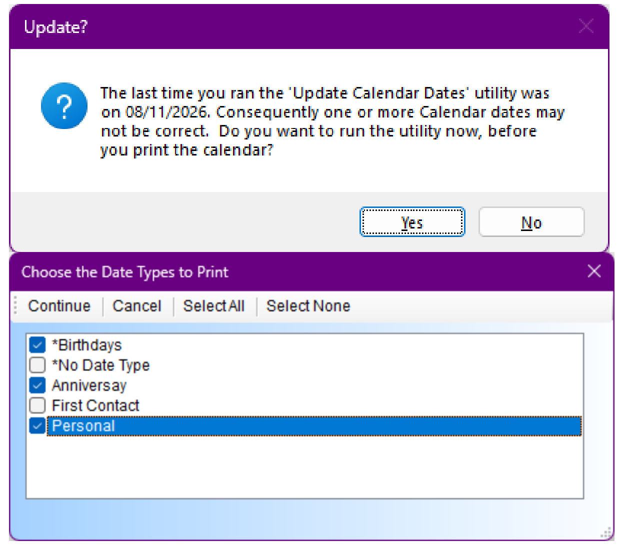
   i. **Listed Labels** – This opens the **Label Printer** dialog with the ability to print labels for all of the rows in this Worksheet.

   ii. **All Labels** - This opens the **Label Printer** dialog with the ability to print labels for all Associate records in the database.

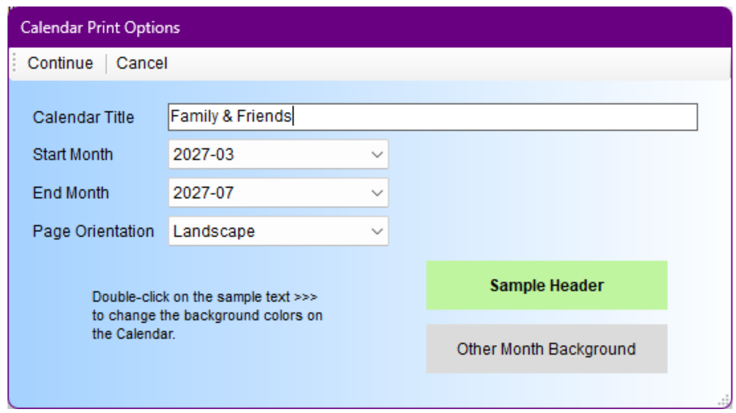
NOTE: Printing labels from the Address Book will display all of the fields from the Address Book AND the Associated People forms. This is because the Associated People records “belong” to a specific Address Book record. So you can use the Full Address field. Printing labels from the Associated People worksheet only displays the fields from that form.

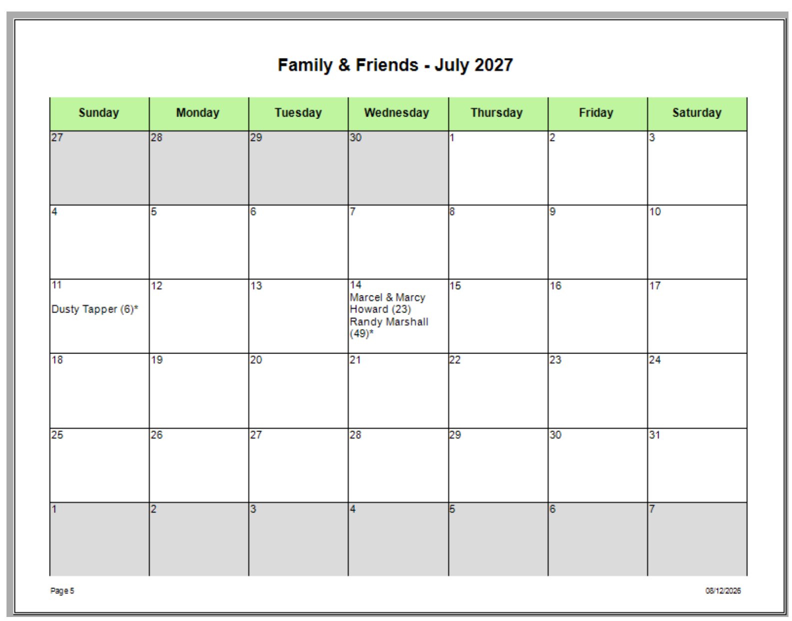
Printing the Address Book Calendars

If you want a hard copy of each month's birthdays, click the **More Options >> Print Calendar** option. This utility:



- Will check to see when the all Calendar Date records were last updated (does this only once a day). The prompt will show you the last update and ask if you want to run the **Update Calendar Dates** utility before printing the calendar. Click **Yes** to run the update, or **No** to continue without updating it.
- Next you can select which Date Types to print. This is a list from the **Calendar Date Type** field on the Address Book record, and includes a reference (***Birthdays**) to all of the Birthday dates in Associated Persons. If you have entries with NO Date Type defined, you can still include those by selecting the ***No Date Type** option. Click **Continue** to confirm your choices.
- Then displays the **Calendar Print Options**:
  - Enter a Calendar title. This text will be displayed in front of the Month-Year at the top of each month's calendar page.
  - Choose the **Start Month** and **End Month** periods to print. Notice that only months that actually have a Calendar Date in them are displayed. Any month between the Start and End Month that does not have a birthday will still print, but not have any names displayed in them.
  - **Page Orientation** – You can print each page in Landscape (default) mode or Portrait.
  - **Sample Header** – Double-click on this space to change the background color for the Day (Monday, Tuesday, etc.) headings on the calendar. The text will be printed in black, so choose a color that is light enough for the days to be visible.
  - **Other Month Background** – Each month on the calendar shows the days belonging to the previous month in the first week, and the days belonging to the next month in the last week ("other" months!). The default color is a light gray, but you can change it here.
- Click **Continue** to show the calendar in the Print Preview window. Each Calendar Date (Birthday, Anniversary, First Contact, etc...) will be displayed on the correct day along with the Name.

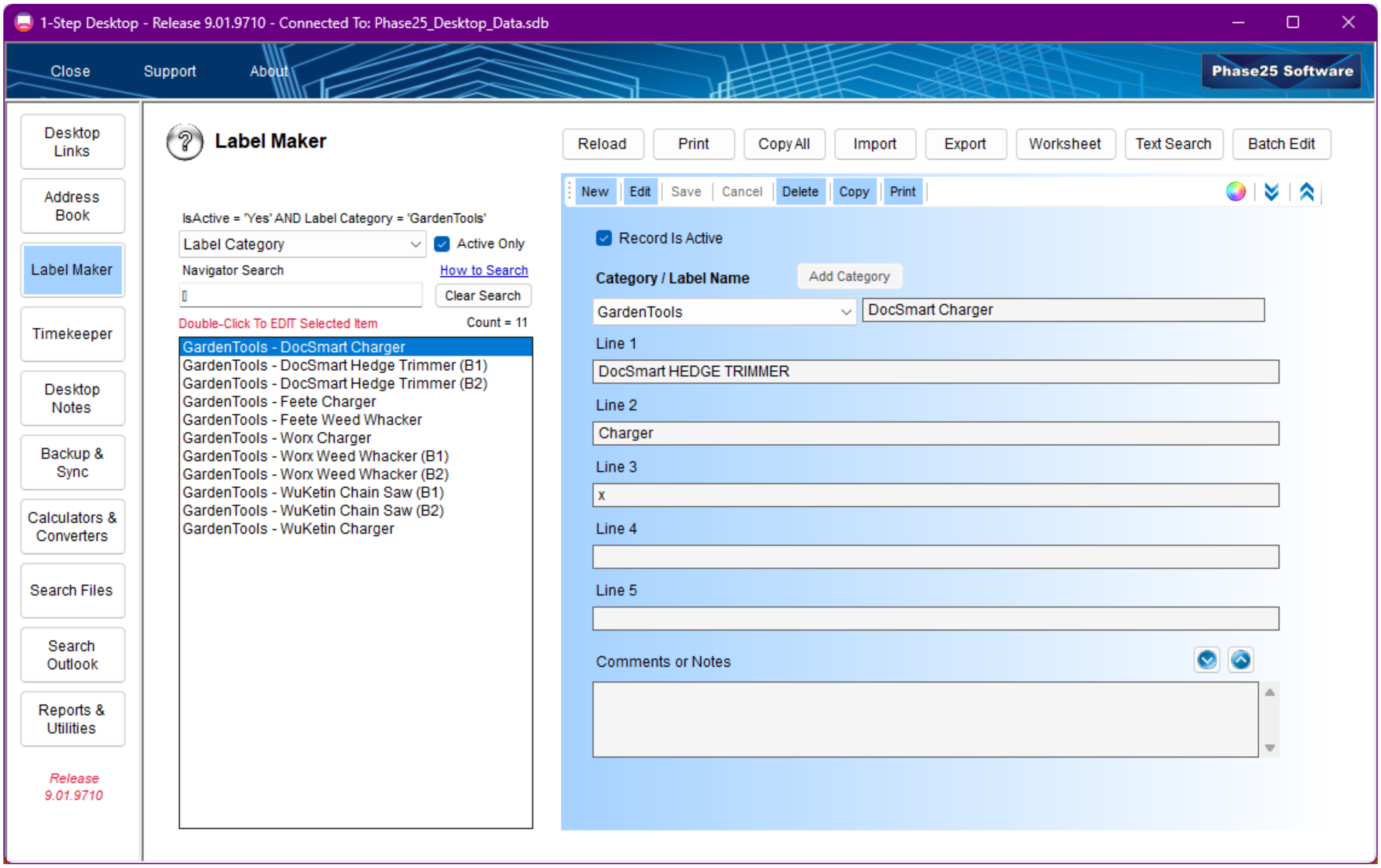




Label Maker

Overview

The Label Maker page can be used in a variety of ways to store information that you want to print on labels. This uses the same Label Printer as the Address Book, but lets you store any non-person information. For example, you can print file folder labels, labels for use in scrap booking or photo albums. You can use it to print price tags for yard or craft sales. In the image below you can see it was used to print labels to mark garden tool batteries and chargers!



Printing Labels & Reports

See the section called Printing Labels for how to format this data onto the type of label you want to print. You can also print all Label Maker records as a text report (see Printing Reports).

For general information about how to add and edit records see the section called Common Features.

Timekeeper

Overview

Timekeeper is your digital stop watch which will track time for any project down to the second! How would you use it? Suppose you're working on a project where you are paid by the time you put into it. Independent contractors often work on an hourly pay scale, submitting their time on a regular basis for payment.

Tasks & Timekeeping

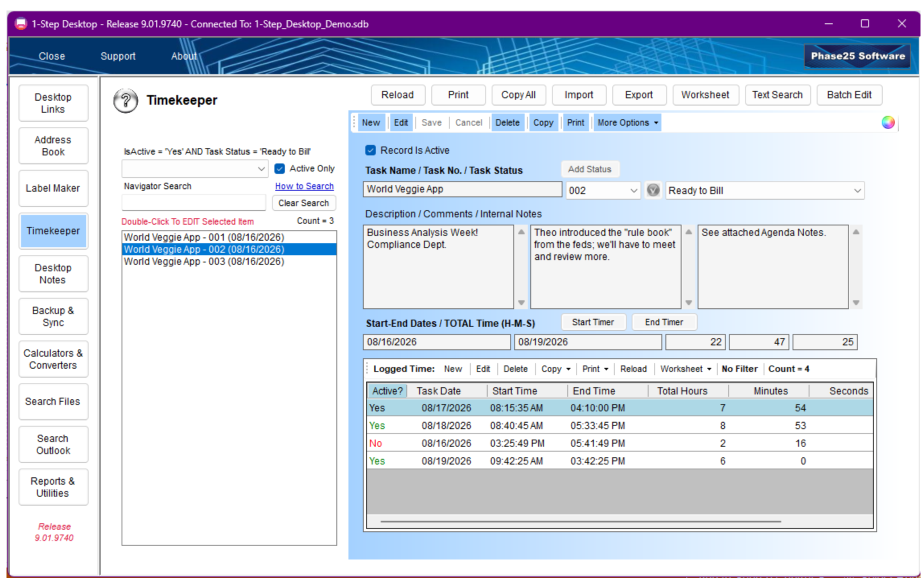
Timekeeper makes it easy to track and report on that time. Just follow these steps:

- Click **New** on the Timekeeper form toolbar to create a new record.
- Enter the **Task Name**; this should be a short descriptive name, which can also be used to filter the Navigator for printing or exporting purposes. This name can be used multiple times as long as the **Task No.** is unique.
- Choose the **Task No.** This is part of the sorting order in the Navigator.
- Add the **Task Status**. This is also a field you can use to filter the Navigator which would be useful when it's time to submit your time for a project.
- Add the **Task Description** that's included in the Time Report
- **Comments** also are displayed in the Time Report.
- **Internal Notes** are NOT included in the Time Report.
- The **Task Date** defaults to the current date, but you can change it manually, or double-click in the field to open a calendar to choose a date.
- **SAVE THE TASK!** You don't have to add time to the Task until you're ready to work on it.
- Click the **Start Timer** button; go to work on your project! The Timer will be displayed at the top of the Filter options, tracking the hours, minuites and seconds while you work.

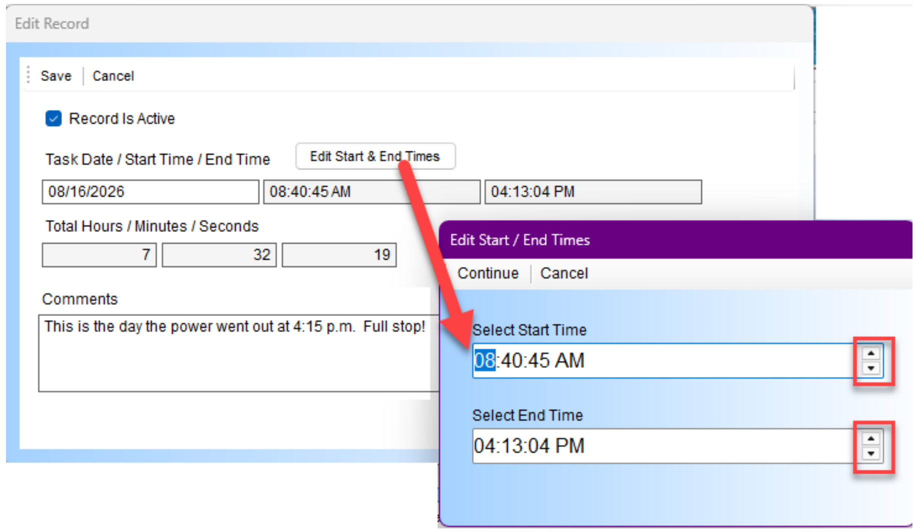
Note that you can use any other features in 1-Step Desktop while the timer is running. **Timekeeper** does not lock down the rest of the application even without saving the record.

When you are finished working on this task, click the **End Timer** button, which does this:

- A new **Logged Time** record will be added to the grid at the bottom of the form with the date, start and stop times entered.
- The hours, minutes and seconds will automatically be calculated.
- The TOTAL Time is updated on the form (Hours, Minutes, Seconds).



Editing a Time Record



You can add Comments to each **Logged Time** record by double-clicking on a row to edit it. You can also adjust the Start and End Times if needed on the **Time** form, which will automatically update the total hours/minutes on the record and the form.

To change the Start and End Times click the **Edit Start & End Times** button which displays a time picker for each field. You can key in the changes, or use the Up/Down arrows to change the selected time value.

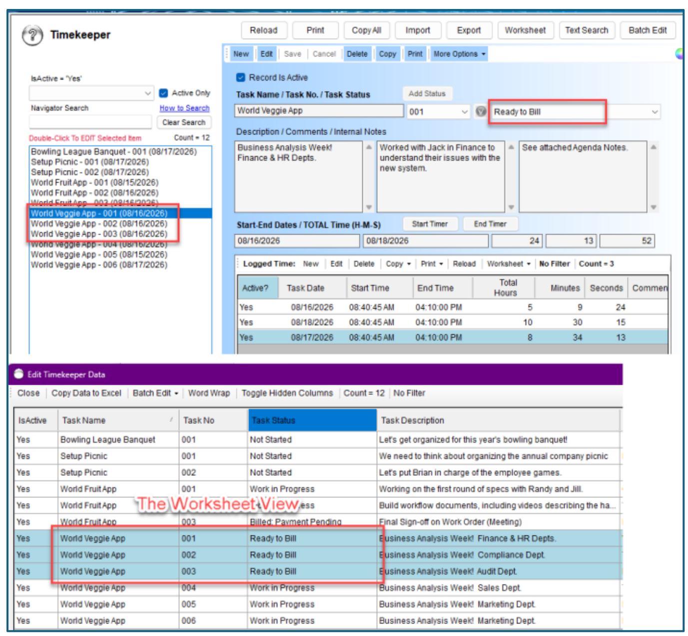
Click **Save** to save your changes, which will update the total Time on the Timekeeper record.

Adding Multiple Time Records

You can add more time to this same Task by clicking the **Start Timer** button again. Every task can have multiple entries on different dates.

Submitting Time Reports

There are two steps to submitting your time for payment or review. First, you will need to filter your Timekeeper records to include ONLY the records that are billable at this time. After that you will decide whether to simply submit the report from the **Print >> Print Time Report** print preview page, or to **Export** the data to Excel (if Excel is enabled in **Reports & Utilities**). Follow the steps below.



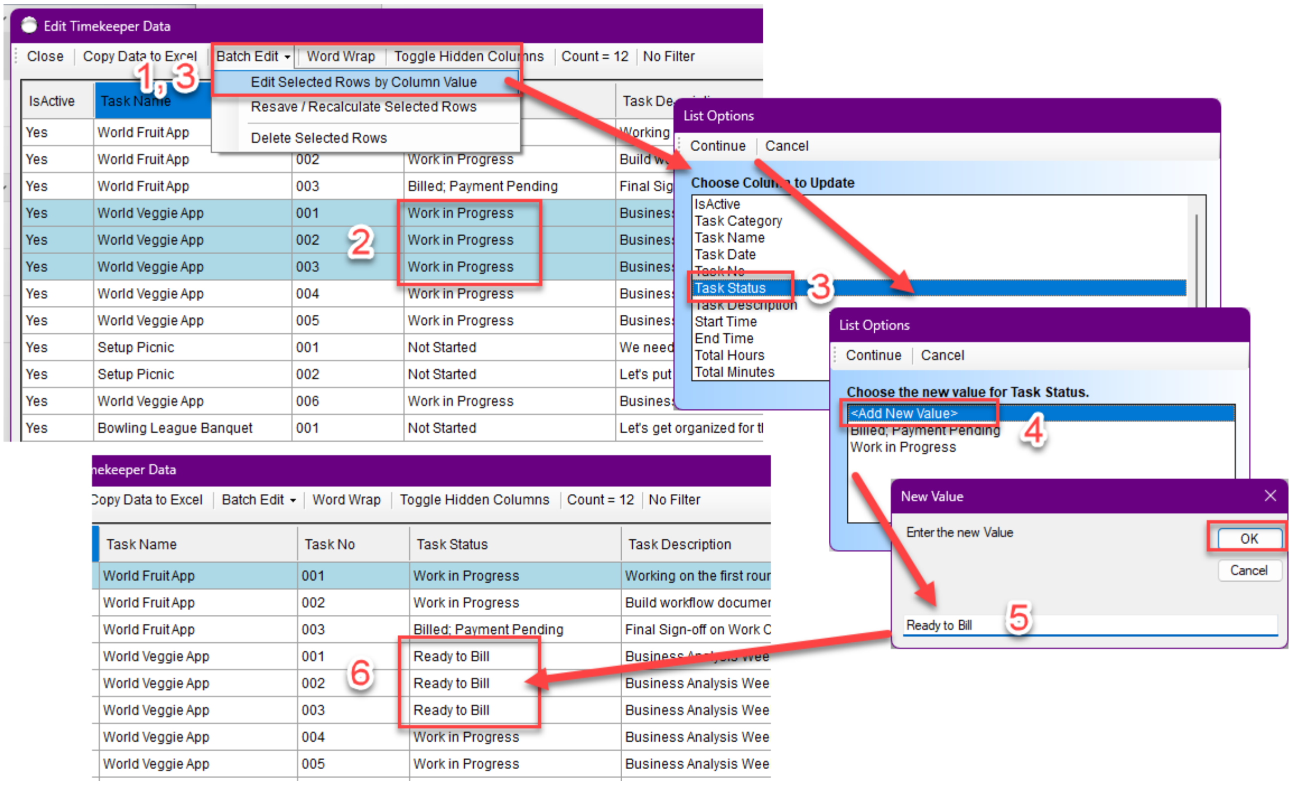
Filtering Timekeeper Records

The fields called **Task Name** and **Task Status** are the keys to submitting hours for payment. You can use the **Batch Edit** in the Worksheet view to set the Task Status field for all "ready-to-submit" rows, then use the Task Name and that Status to filter the Navigator. Remember we filter the Navigator before Printing or Exporting data as those functions ONLY use the data in the Navigator.

Time Report Example

In the Navigator there are multiple Tasks. The first three Items for the "World Veggie App" are ready to be billed.

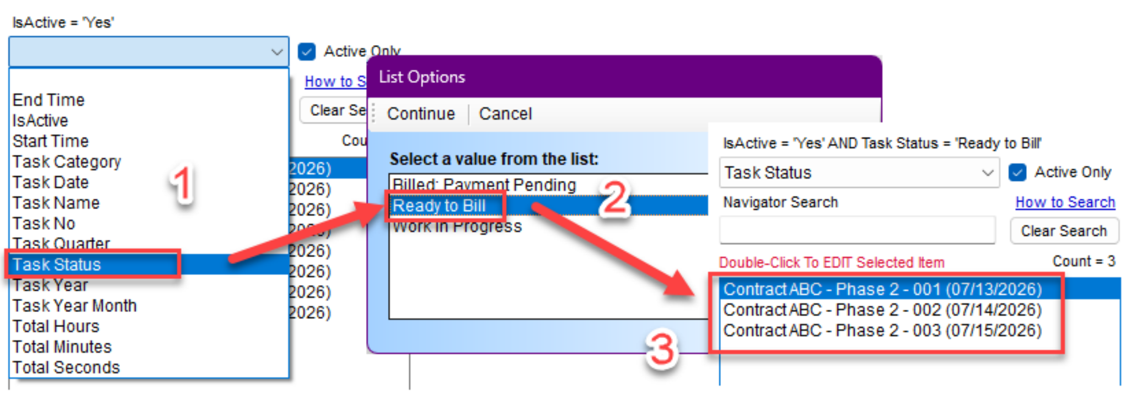
1. On the Worksheet, we can use the **Batch Edit** feature to select each of these rows and change the **Task Status** to **Ready to Bill**.
2. Select the three rows by dragging across them. Click on **Batch Edit >> Edit Selected Rows by Column Value**.
3. Click on the **Task Status** field if not already selected. Click Continue.
4. If the value you want to use is listed, select it. Otherwise, click on **<Add New Value>** and click Continue.
5. Enter the new value in the prompt: "Ready to Bill". Click Continue.
6. The Task Status in the selected rows are updated. Click **Close** on the toolbar to close the Worksheet.



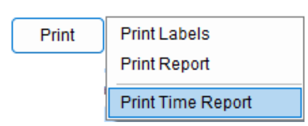
Printing the Billing Report

The next steps are:

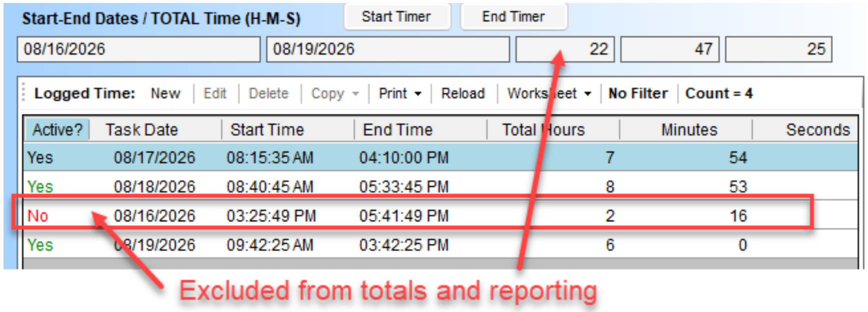
1. Filter the Navigator first by the **Task Status** fields.
2. Choose **Ready to Bill** from the list of values. Click Continue.
3. If there are records belonging to another **Task Name**, filter again by the Name you want to bill using the same steps.
4. The Navigator now shows the records we want to print.

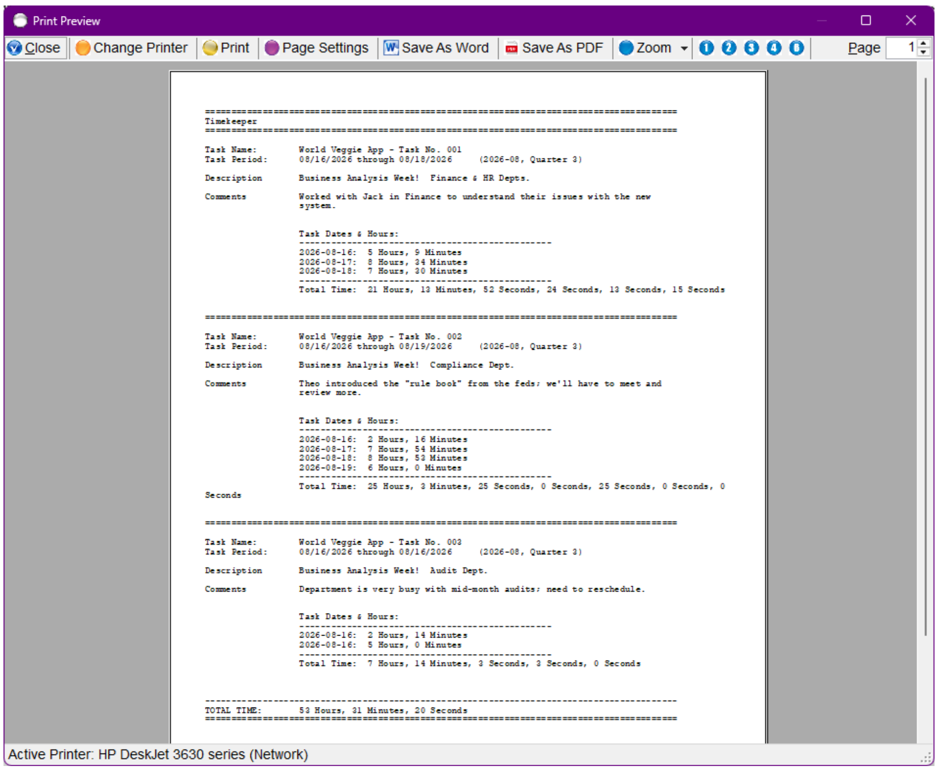


Click **Print >> Print Time Report** (a custom report for Timekeeper) on the Button Toolbar. The results will show only these three records, with a total of the Hours, Minutes and Seconds at the bottom of the report.



NOTE: If you deactivate a record on the Time grid (IsActive = No), that record will remain in the list, but will be excluded from the Total Hours, Minutes & Seconds calculation on the Timekeeper record. It will also be excluded when printing any of the reports.





Additional Print Options

- Use the **Save As Word** or **Save As PDF** buttons on the Print Preview window to export the report to either of those formats.
- Or, close the Print Preview window and click on the **Copy All** button on the toolbar to copy this same formatted text to the Windows Clipboard. You could also use the **Export** button to export the data to Excel in the same format as the Worksheet displays if your client needs a format that could be imported into their payables system.

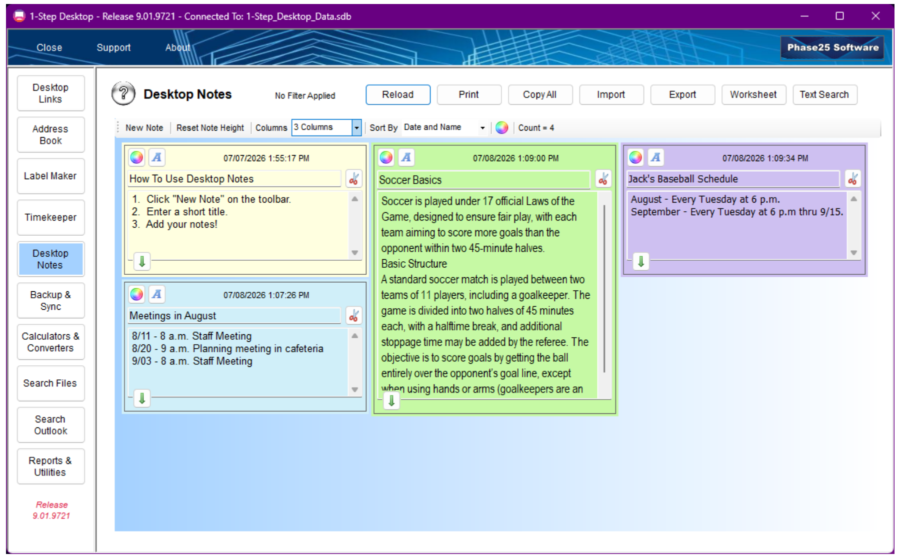
Desktop Notes

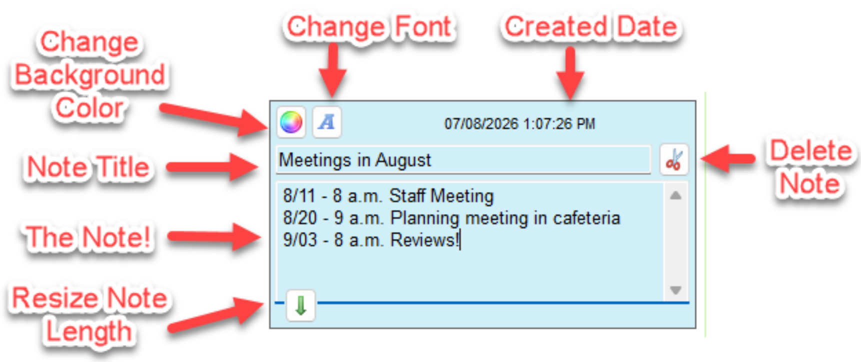
Overview

Desktop Notes is a one-page storage container for temporary information. If you have used Windows Sticky Notes you are familiar with what type of data is kept.

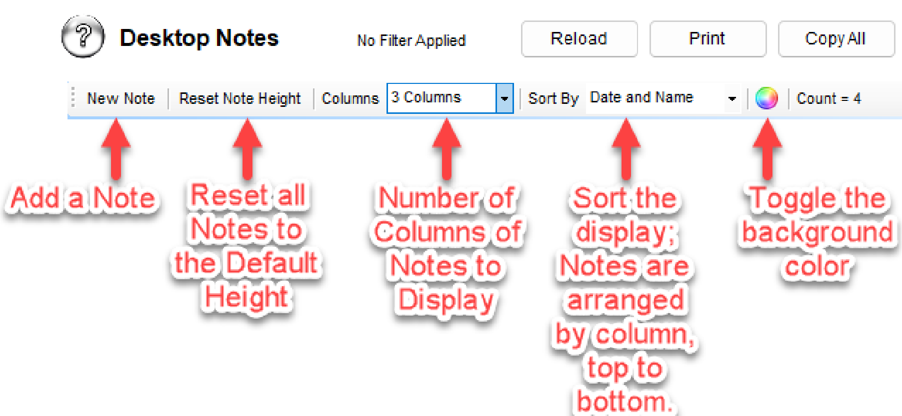
Desktop Notes adds the ability to search, sort, import from Excel, export, copy and print the information on your notes. You can also color-code and change the font styles on each Note.

Desktop Notes has a unique layout in 1-Step Desktop which displays all of your notes like a bulletin board does. This display makes it easy to see ALL notes without cluttering up your desktop.





The toolbar has options to customize how the Notes are displayed.



See Common Features for using the button toolbar features.

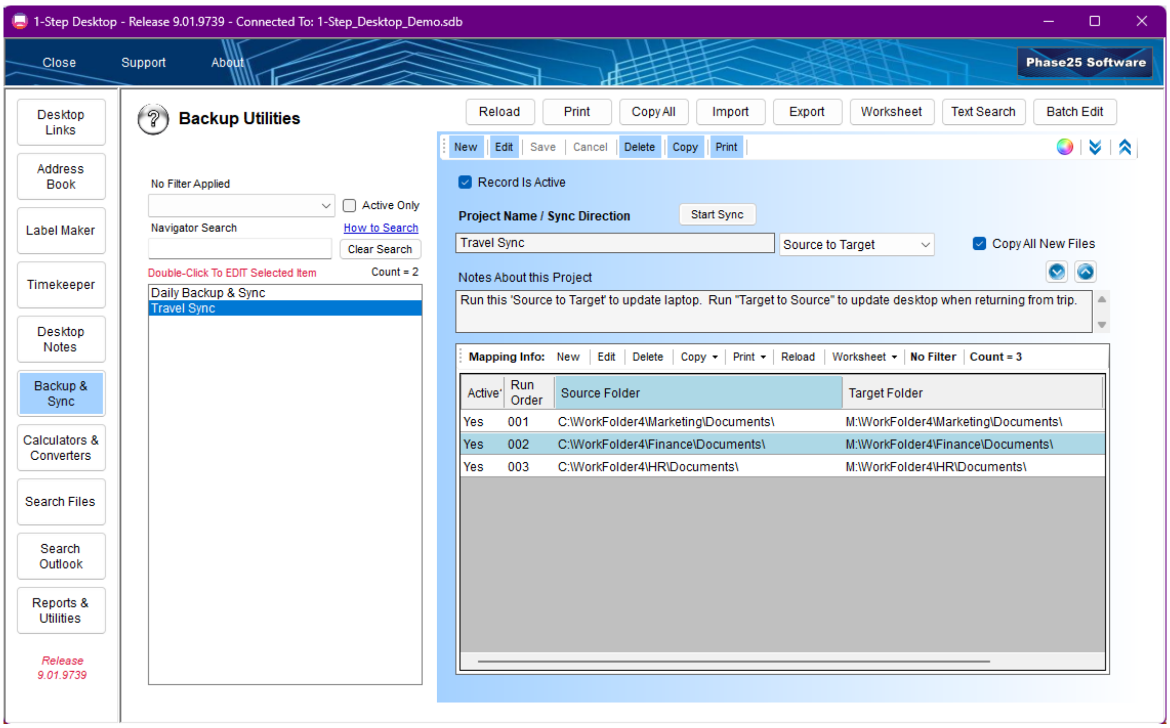
Backup & Sync

Overview

The **Backup & Sync** utilities provide an easy way to backup all changed files at the end of the workday. You can setup multiple projects that map folders from one device to another.

If you work on a desktop, but travel with a laptop, setup a project to quickly update your laptop from your desktop before you leave.

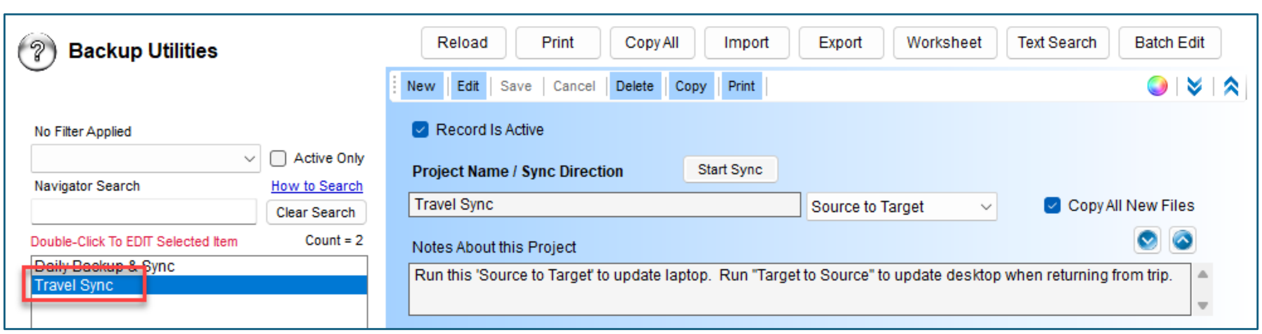
When you return to your office simply reverse the file-update direction to sync your laptop with your desktop.



Creating a New Project

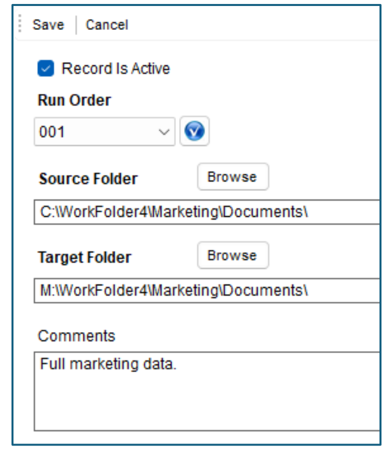
Click **New** on the toolbar to create a new record and enter the Project Name. Choose the **Sync Direction** from the drop-down list (Source to Target, Target to Source) and whether to include new files by checking the **Copy All New Files** checkbox.

Enter any notes you need to remind yourself what this project does or when to run it.



Click **Save** on the toolbar to save your selections. The Project Name will be added the Navigator on the left.

Adding Folders to a Project



On the **Mapping Info** grid, click **New** on the toolbar to create a new folder-to-folder item. The **Run Order** field is automatically incremented when you add a new mapping.

Click the **Browse** button on each of the Folder fields to select the **Top** folders (all files and subfolders will be synchronized between them). Notice that they do NOT have to be named the same. Enter any **Comments** that apply to this mapping.

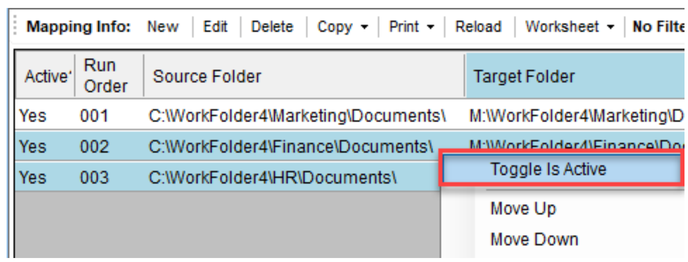
Click **Save** to save your selections and close the dialog.

Ready to Run It? Click the **Start Sync** button above the Project Name field to start the project. A progress bar at the top of the window will display the folders that are included in the process and a dialog will display the results.

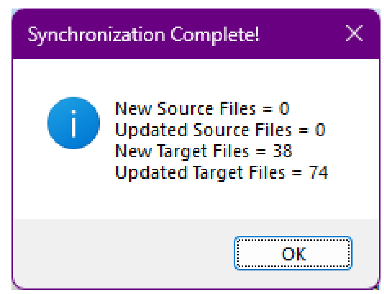
TIPS: You can change the **Run Order** by selecting a row, right-click, Move Up or Move Down.

Running A Project

Only "Active" mappings are included in a synchronization. You can edit each row and uncheck the **Is Active** checkbox, or simply select the row(s) in the grid and right-click, click on **Toggle Is Active** to turn each row on or off. This feature can be used to save time if you know a particular folder was not changed and doesn't need to be synched again.



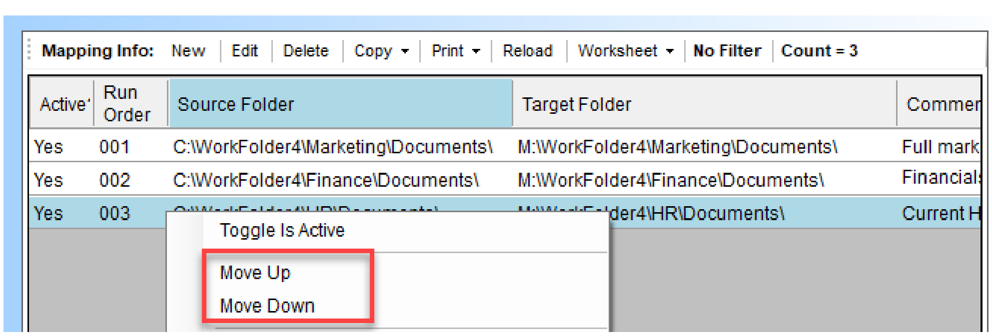
Click the **Start Sync** button above the Project Name field to start the project. A progress bar at the top of the window will display the folders that are included in the process and a dialog will display the results.



Changing the Run Order

The **Run Order** number on each mapping record determines the order the synchronization is performed. You can manually edit these values by editing each record and changing them or use this shortcut:

- Click on the row you want to move.
- Right-click and choose **Move Up** or **Move Down.**
- The **Run Order** values for the selected row, and the row that's being moved, are both updated.



Calculators & Converters

Overview

This is a collection of Financial Calculators, a Measurement Converter, an Image Converter and a PDF-File-Merge utility.

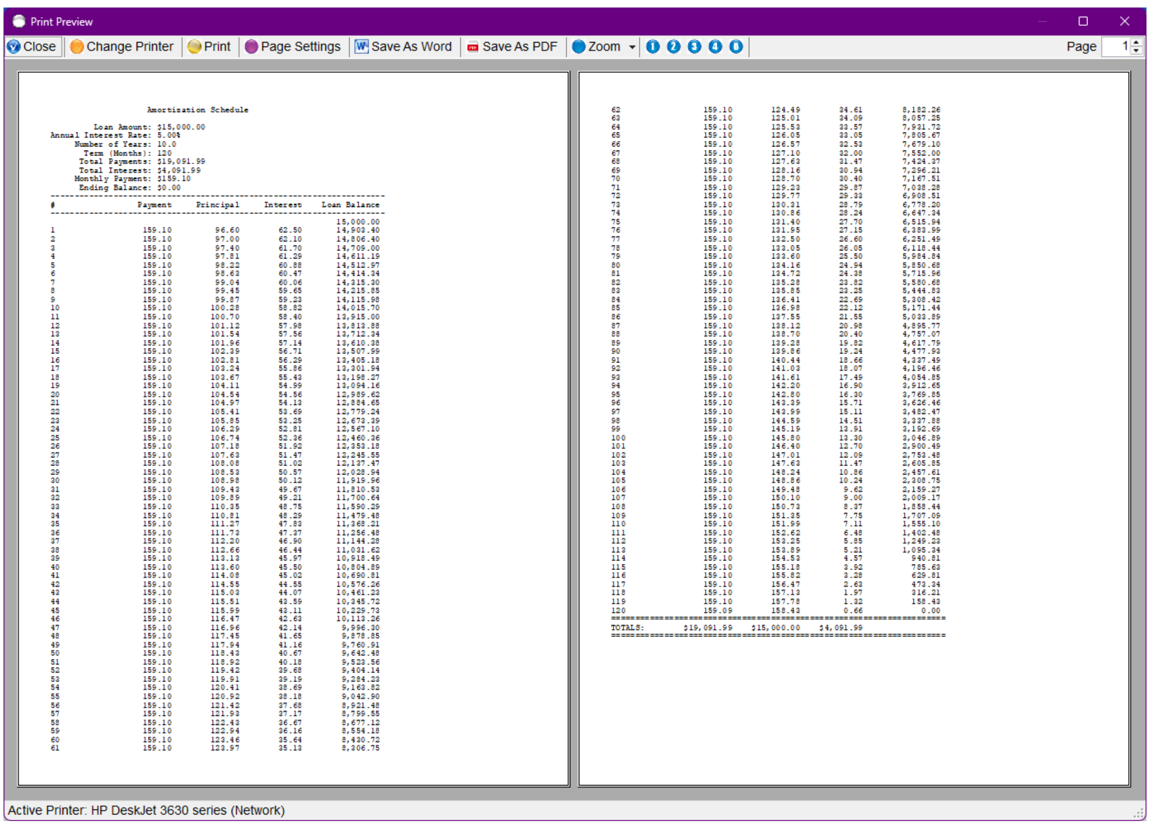
The Financial Calculators include a utility to create a full Amortization schedule, calculate the time it takes to pay off a loan, determine the future value of investments and monthly savings you'll need to make to reach a goal.

Use the Measurement Converter to convert from Standard to Metric (or vice-versa) values.

Easily combine any number of PDF files into a single file in any order you wish with our slick PDF File Merge feature.

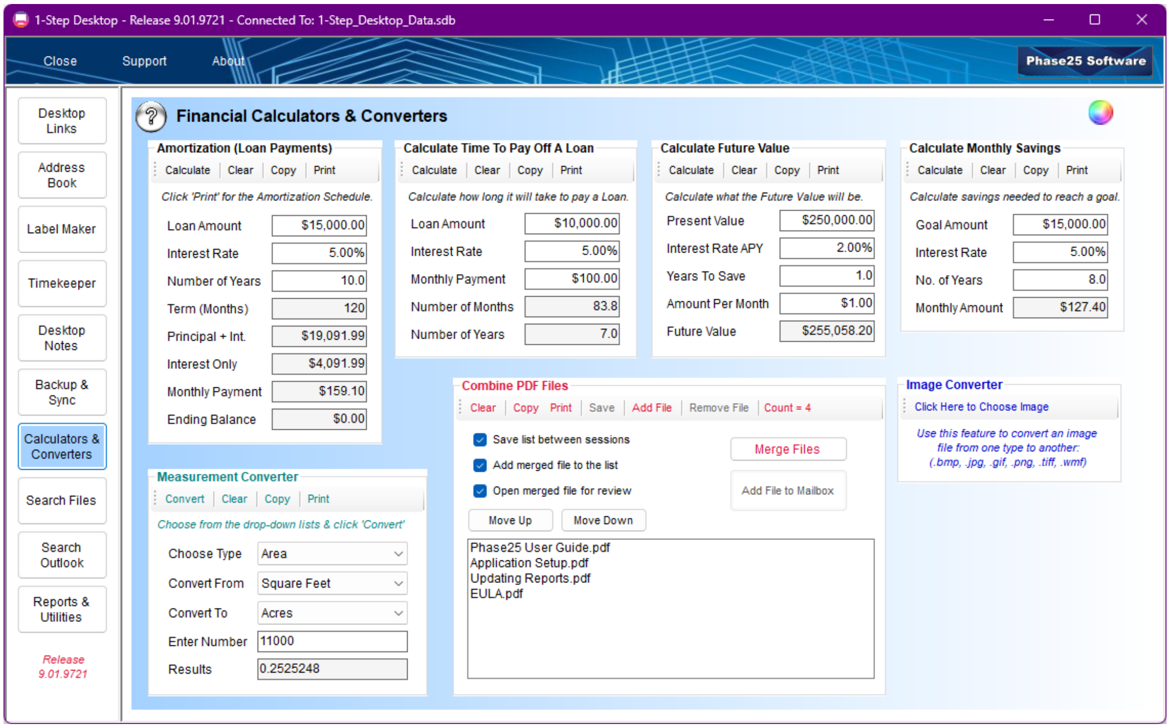
What Each Utility Can Do

- Financial Calculators
    - **Loan Payments** – creates a full Amortization Schedule with breakdown of principal and interest payments each month (see image below).



-
    - **Time to Pay Off a Loan** – calculates the time to pay off a loan using the Loan Amount, Interest Rate and the Monthly Payment amount.
    - **Future Value** – Enter the present value of an account, the annual Interest Rate and how many years you can wait. The results is the value of that account at the end of the period.
    - **Monthly Savings to Reach a Goal** – Calculate how much you need to save each Month at a given Interest Rate to reach a specific monetary goal.
- Measurement Converter
    - Area, Length, Power, Speed, Temperature, Volume & Weight
    - Standard to Standard, Standard to Metric, Metric to Metric

- PDF Files Merge Utility
    - Combine one or more PDF files into a single PDF file. **NOTE**: PDF files that have been locked down for security reasons or password-protected will not be able to be merged. This utility respects documents that should not be altered or combined into other documents.
- Image Converter
    - Convert to and from: .bmp, .jpg, .gif, .png, .tiff, .wmf. You'll be prompted to choose the Image file to convert, then prompted where to save it on your computer as a different type.



Each of these utilities has its own toolbar where you can Copy or Print the results (excluding the Image Converter).

When a calculator is used the values you enter and the results are saved until you change them. You can close 1-Step Desktop and reopen it without losing your information.

Search Files

Overview

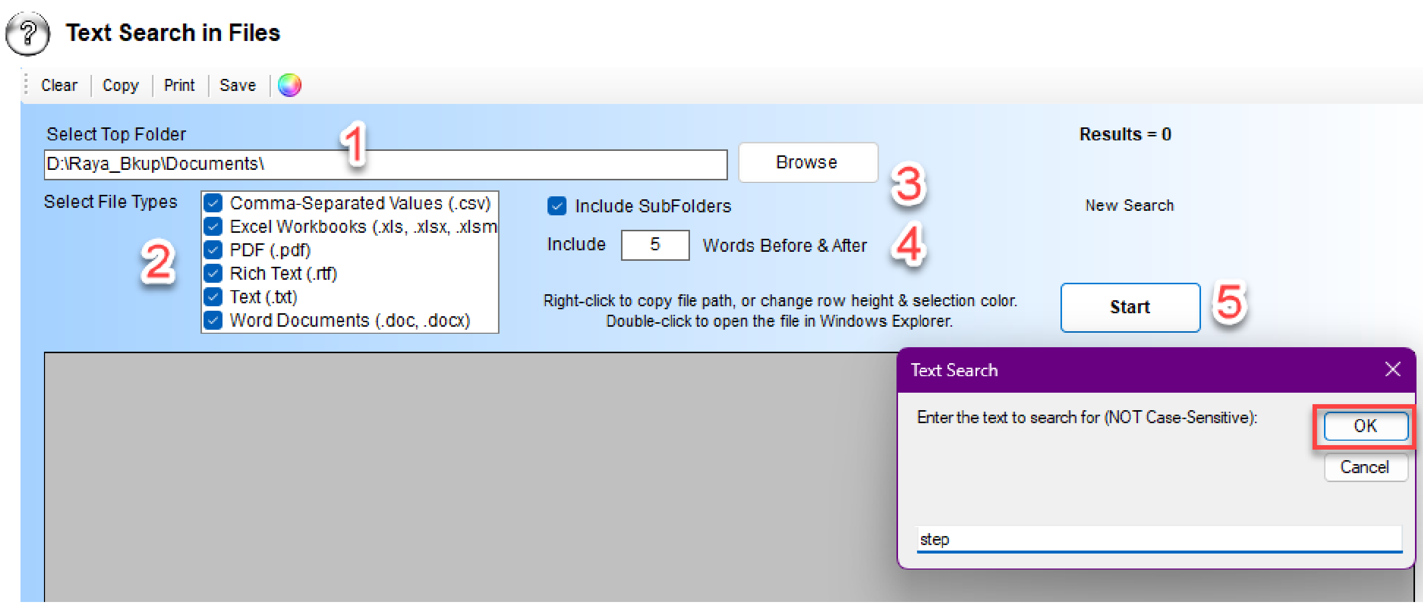
Use the **Search Files** page to search for specific text INSIDE of Word and Text documents, PDF files and Excel spreadsheets. This creates a full list of "finds" including surrounding text for context. Just double-click on a row to open the file in its native application.

NOTE: Microsoft Word (Desktop version) required for Word, PDF & Rich Text searches. Microsoft Excel (Desktop version) required for workbook searches.

Starting A Search

Follow these steps to start a search:

1. Use the **Browse** button to choose the top folder to search.
2. Select the **File Types** to search. NOTE: If you do not have the desktop version of Excel on your computer that option will not be listed. If you do not have the desktop version of Word, the PDF, Rich Text and Word options will not be listed.
3. Choose to include searching in folders within the Top folder by checking the **Include SubFolders** option.
4. The results displays the text you're searching for surrounded by a number of words before and after that text. This context makes it easier to determine if that's exactly what you're looking for. By default, it includes 5 words on both sides, but you can change it here by entering a different number.
5. Click the **Start** button and enter the text to search for in the prompt. This text is NOT case-sensitive. Click **OK** to run the Search.



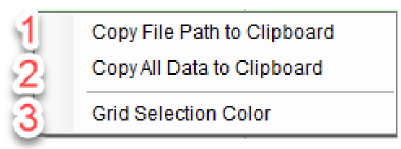
The results will be displayed in the grid at the bottom of the form:

File Path	Text Content
C:\MyData\EventDocs\January_2025_Mtg.docx	See the attached user style guide in the same folder as the
C:\MyData\EventDocs\January_2025_Mtg.docx	users can find this new guide in the library or coffee room
C:\MyData\EventDocs\January_2025_Mtg.docx	Standard User Guide - January 2025
C:\MyData\EventDocs\January_2025_Mtg.docx	more information about this topic's guide will be added as needed
C:\MyData\EventDocs\January_2025_Mtg.docx	send the form with guide instructions to the same party
C:\MyData\EventDocs\March_2025_Mtg.docx	March User Guide - January 2025
C:\MyData\EventDocs\March_2025_Mtg.docx	Jack will be using this guide for training and event purposes
C:\MyData\EventDocs\March_2025_Mtg.docx	updates will be added to guides before the summer meetings and
C:\MyData\EventDocs\March_2025_Agenda.xlsx	will update our standard guide for each category in this
C:\MyData\EventDocs\March_2025_Agenda.xlsx	time is ticking on printing guides and standard docs for users
C:\MyData\EventDocs\July_2025_Mtg.docx	more information about this topic's guide will be added as needed
C:\MyData\EventDocs\August_2025_Mtg.docx	Standard User Guide - August 2025
C:\MyData\EventDocs\August_2025_Mtg.docx	will update our standard guide for each category in this
C:\MyData\EventDocs\Sept_2025_Agenda.xlsx	Mary will be using this guide for future training purposes.
C:\MyData\EventDocs\Oct_2025_Agenda.xlsx	will update our standard guide for each category in this
C:\MyData\EventDocs\Oct_2025_Agenda.xlsx	Standard User Guide - October 2025

Just double-click on a row to open the file displayed in the **File Path** column. Use the file's application "Search" feature (most have it) to locate the exact text you're looking for.

Grid Options

Right-click on the grid to display these options:



1. **Copy File Path to Clipboard** – The file path on the selected row is copied to the Windows Clipboard
2. **Copy All Data to Clipboard** – This copies the headers and all rows to the Windows Clipboard so you can paste the data into Excel or a word processor document.
3. **Grid Selection Color** – Use this to change the selected row back color.

Search Outlook

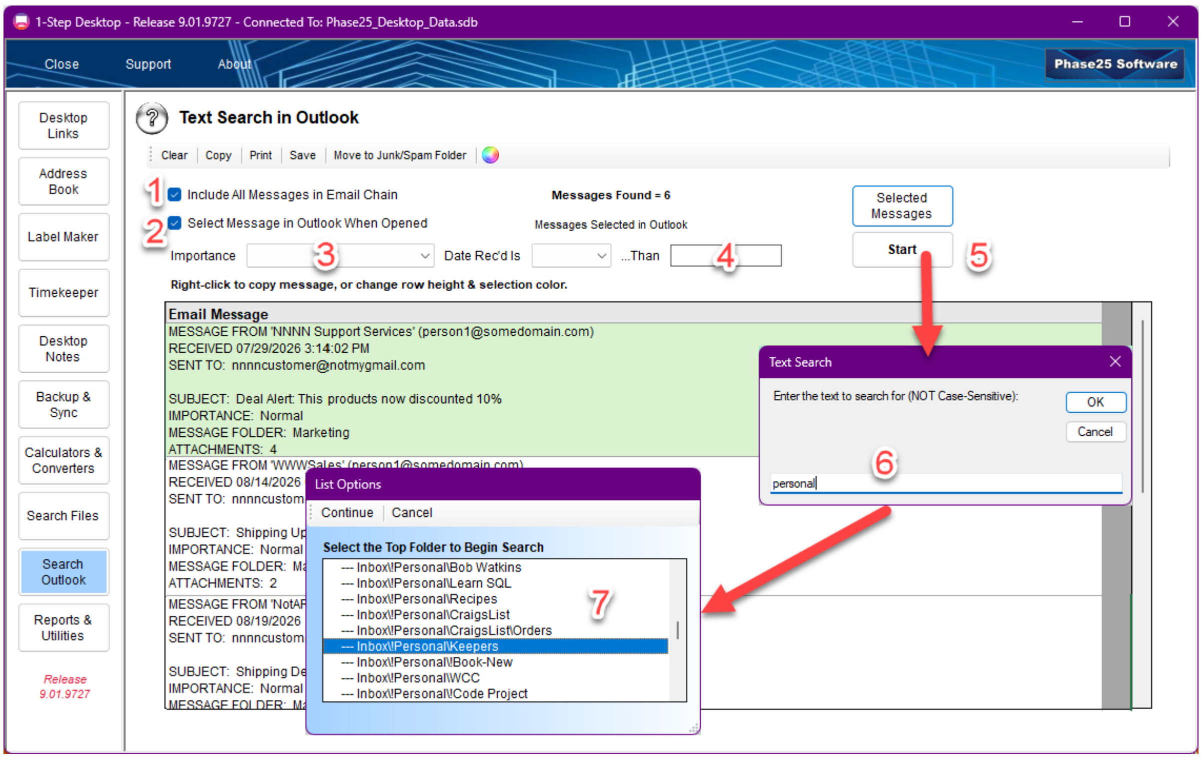
Overview

Are you frustrated with the native Outlook search features? The **Search Outlook** page makes finding email messages quickly and easily. Just enter the text you're looking for and click the button. A complete list of "finds" is displayed; double-click on a row to open the message in Outlook.

Select one or more messages in Outlook and click the **Selected Messages** button to display them in the grid. All messages are converted to simple text so you can copy and paste the contents into any other application.

You can also move all selected messages directly to your Junk/Spam folder with a simple click!

NOTE*: Microsoft Outlook (Desktop [Classic] version) required.*



How To Search in Outlook

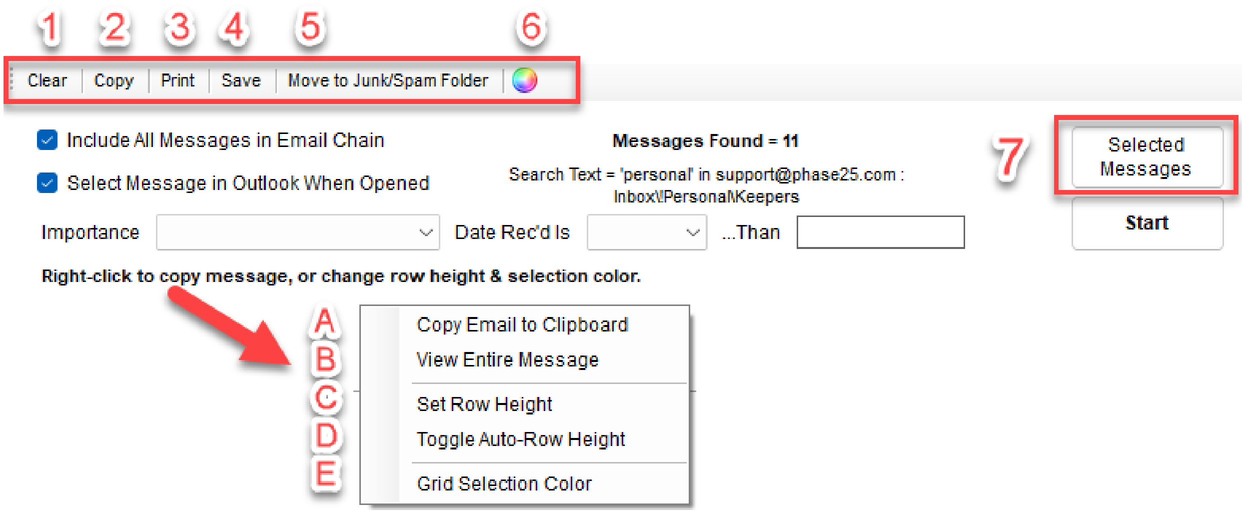
Microsoft Outlook (Classic) must be open on your desktop, then follow these steps to run the search:

1. Check the **Include All Messages in Email chain** to bring ALL messages in an email chain into the view. Uncheck it to display only the message containing the search text.
2. You can open any message displayed in the grid in Outlook by double-clicking on the row. Check the **Select Message in Outlook when Opened** to automatically have Outlook select and display the same message.
3. You can search messages by **Importance** by choosing a value from this list: High, Low, Normal.
4. Search by Received Date by choosing the operator (Date Rec'd is =, >, >=, <, <=) and entering the Date.
5. Click the **Start** button to begin the search.
6. Enter the text to search for; this is NOT case-sensitive.
7. A list of readable folders is displayed. If you have multiple email addresses connected in Outlook, each address will display the folders under its name. Select the top folder to search and click **Continue**.

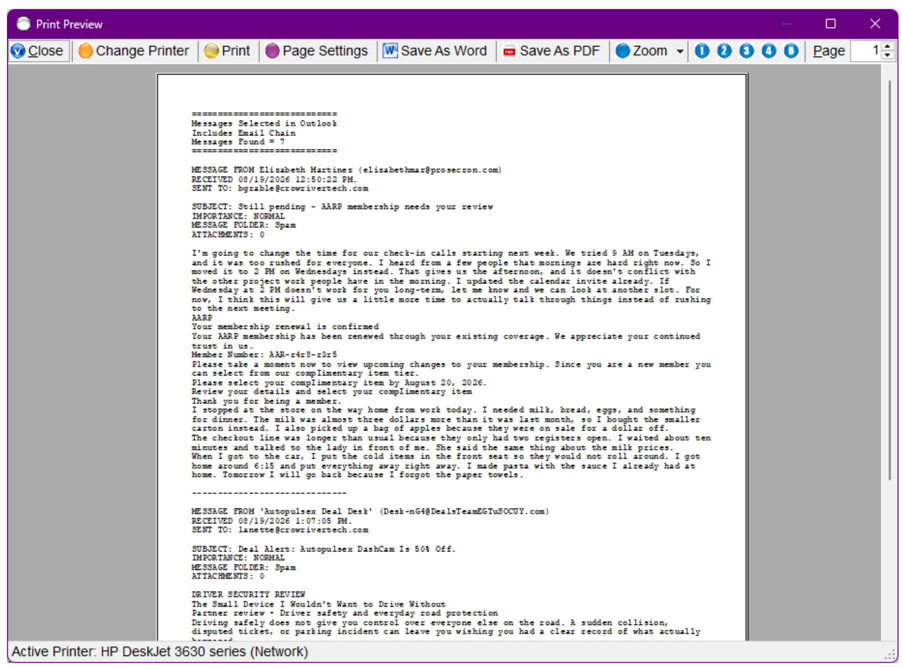
The results is displayed in the grid at the bottom of the form. Double-click in any row to open the email directly in Outlook.

Additional Options

These are additional features you can use while working with Outlook messages:



1. **Clear** – Clears the grid without changing your current settings.
2. **Copy** – Copies all of the messages displayed in the grid to the Windows Clipboard.
3. **Print** – Displays all of the messages in the Print Preview window.
4. **Save** – Prompts you for a file location on your computer to save all of the messages as a text document (.txt).
5. **Move to Junk/Spam Folder** – this option moves all of messages displayed in the grid to the email account's Junk or Spam folder. NOTE: Doing this in Outlook (right-click on a message, Mark as Junk) only moves one message at a time.
6. Toggles the Search Outlook form background color from the **Form Background Color** selected in **Reports & Utilities** to white, and back again.
7. Select one or more messages in Outlook and click the **Selected Messages** button to display them in the grid. This bypasses the Search utility.



Right-click on the grid to open the popup menu with these options:

A. Copy Email to Clipboard – copies the selected row's text to the Windows Clipboard.
B. View Entire Message – when a message is really long you can use this option to open the text in a full size window. This window's background is yellow, double-click on it to close it.
C. Set Row Height – Drag any row to the preferred height in the grid, then choose this to save your preference.
D. Toggle Auto-Row Height- This options switches between your preferred row height (C), and the full size needed to display the entire message.
E. Change the selected row color on the grid.

Reports & Utilities

Overview

The **Reports & Utilities** page contains options for managing your database, setting User Preferences, checking for updates and running system reports. This is the page you will see the first time you open the application.

Desktop Links Password

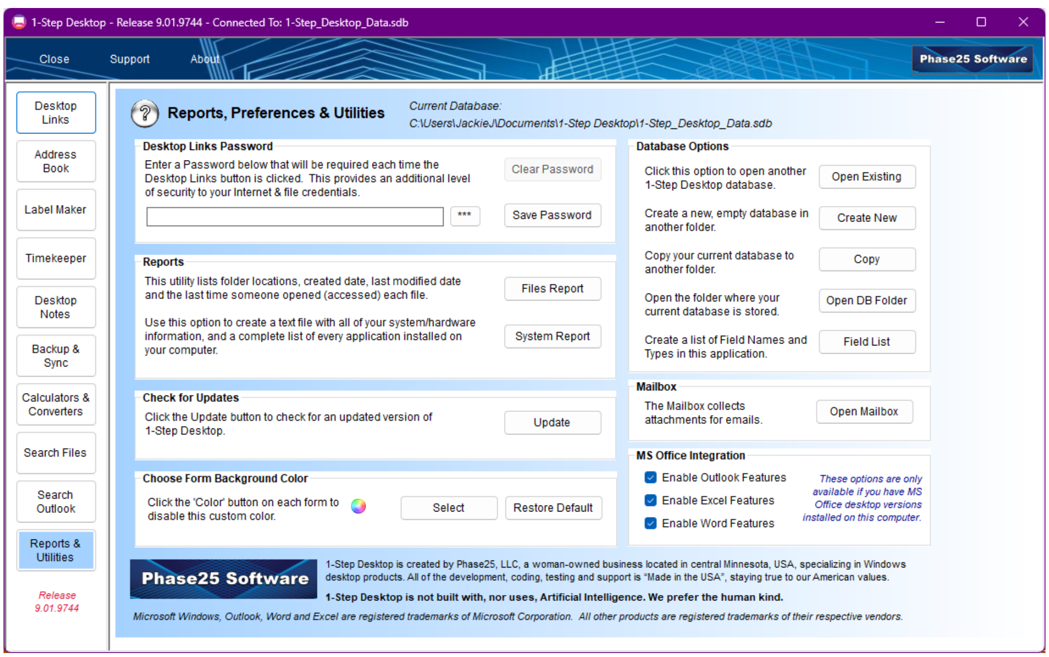
This is used by **Desktop Links** to add another level of security to your internet login names and passwords.

See the Desktop Links Password section for more information.

Reports

There are two system reports available from these buttons:

- The **Files Report** will create a complete list of files and folders on your computer or network including the file size, created, last edited and last accessed dates. You will be prompted to pick the starting folder (directory) and all files and folders within that folder will be logged. You can compile the data as an Excel workbook (IF you have Excel installed on your computer), or as a comma-separated-values file, or as a text file which is displayed in the Print Preview window.
- The **System Report** creates a report of your computer's hardware configuration and a list of all installed applications. This can be helpful when troubleshooting issues with your computer. This report is displayed in the Print Preview window.



Check for Updates

We offer free upgrades to our licensed users! Just click this button to see if a newer version exists. If it does, just follow the prompts to update your application.

Choose Form Background Color

Don't like the soft blue color in 1-Step Desktop? Just choose a different color that suits the season, the weather and your mood ! And… there's a "color" button on each form that lets you turn off the color on that form. View it your way!

Database Options

The first time 1-Step Desktop is opened it automatically creates a database for storing your data input in your "Documents/1-Step Desktop" folder. You can use this database without making any changes. However, if you want to start a different database, you can click the **Create New** button to create a new database in another location, or use the **Copy Database** to copy your database to another location. If you are using more than one database, click the **Open Existing** button to switch from one to another. It's just like if you closed a Word document and opened a different one.

The **Field List** button creates a text file that's displayed in the Print Preview window containing all field names and types for any of the tables behind the data in the system. For example, choose **Address_Book** to display all of the fields from the Address Book and the Associates grid. This list gives you the actual names which you an use along with the Export function on a table to create a Word mail merge, for example.

The Mailbox

If you have Microsoft Outlook DESKTOP Version (also called **Classic**), the **Open Mailbox button** will be active, which opens the **Mailbox** dialog. This lets you gather a list of attachments that you want to add to an Outlook message. The Desktop Links page also uses the Mailbox to add files from its list of links. See the Desktop Links section for more information.

MS (Microsoft$^{(R)}$) Office Integration

These options are only available if you have the Microsoft Office DESKTOP versions installed on your computer. If one or more of those applications are not present these checkboxes will be grayed-out. If they're active, by default the integration with Outlook, Excel and Word is automatically enabled (the boxes are checked). If for some reason you don't want to use the features (see below) that work with MS Office, you can uncheck them.

Outlook-Linked Features

- **Search Outlook** button on the Main (side) Menu is activated.
- Double-clicking in the **Email Address (1)** and **Email Address (2)** fields in the Address Book creates a new email in Outlook and enters the email address automatically.
- The **Mailbox** option is available on the **Reports & Utilities** page.
- The **Mailbox** option is available in Desktop Links. **NOTE**: if Outlook checkbox is unchecked you will need to restart 1-Step Desktop to remove the Mailbox from the Desktop Links "More Options" menu.

Excel-Linked Features

- The **Import** button on the top of all forms includes options to **Import from Excel** and **Download Excel Template**.
- The **Export** button on the top of all forms exports the data to Excel instead of a comma-separated-values files (without Excel enabled).
- The **Worksheet** has an option to **Copy to Excel**, which creates a new Excel workbook and copies the displayed rows into it.
- The **Search Files** utility includes Excel in its lists of File Types available to search.

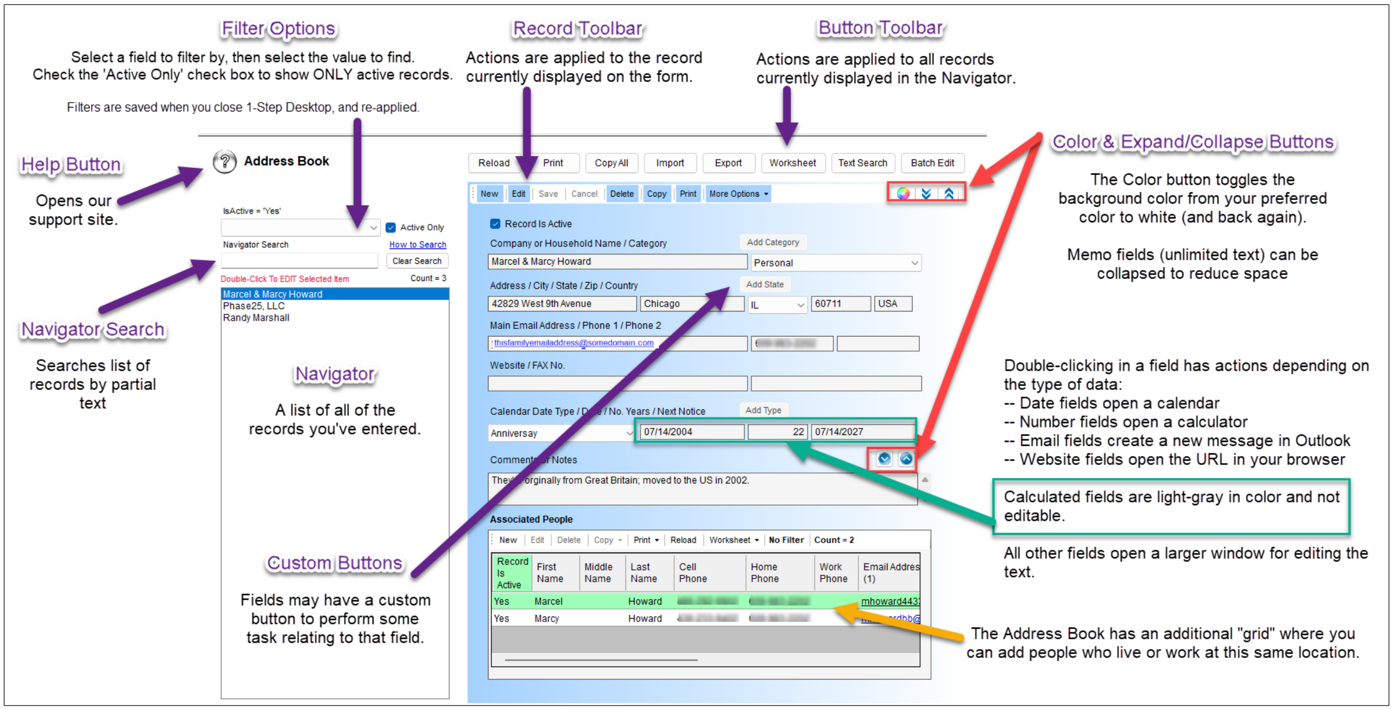
Word-Linked Features

- The **Search Files** utility includes **Word, PDF and RTF (Rich Text**) in its lists of File Types available to search.
- The **Print Preview (Reports)** toolbar has options to save the report to MS Word or as a PDF file.

Appendix A - Common Features

These are the common features for working with these pages:

- Desktop Links
- Address Book
- Label Maker
- Timekeeper
- Desktop Notes (some features not available)
- Backup & Sync



The Navigator

This list displays the unique identifier for each record. For example, on the Address Book, if a record is a company, the company name is used. If not a company, the personal name (First Name, Middle Name, Last Name) is displayed. Each of these values are unique, and ensure that you don't have duplicates in the system. When you add a new record, or edit an existing one, this unique value is automatically updated. When you click on a name in the Navigator the entire record is displayed on the form. **NOTE:** The Navigator is **not** used with Desktop Notes.

Filter Options

This is a drop-down list of the fields that you can use to Filter the Navigator. This utility gives you a way to temporarily reduce the list of records you want to work with. When you choose a field to filter by, a list of available values are read from existing records and displayed. Select a value, and only those records with that value in the selected field will be displayed in the Navigator. **NOTE:** Filtering in Desktop Notes uses different functionality.

You can choose another field and its value to further filter a list which will be added to any existing filter. Choose the empty value in the list to clear all filters and reload the Navigator.

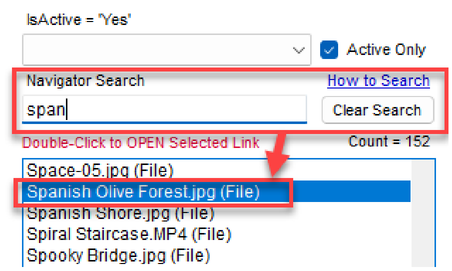
The **Active Only** checkbox by the Filter Options is another level of filtering which uses the value in the **Record Is Active** checkbox on each record. The value is "Yes" when the checkbox is checked, "No" when unchecked.

All filters are saved when you close **1-Step Desktop** and re-applied when you open it again.

Help Button

This opens our support site where video tutorials and other information can be reviewed.

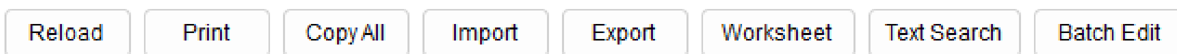
Text Search



When you can't find what you're looking for in the Navigator, just enter a few characters in this Search field and hit "Enter". This search looks for any Record name that CONTAINS the text, and is not case-sensitive. Hit Enter again to cycle through the entire list. When a record name is selected, the form is updated with its data. Hit TAB on your keyboard, then ENTER to click the "Clear Search" button and your cursor is back in the empty Text Search field, ready to start again. Click the **How to Search** link to copy these steps to the Windows Clipboard.

Button Toolbar

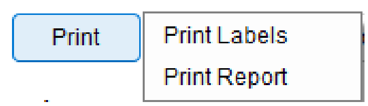
The Desktop Links, Address Book, Label Maker, Backup & Sync and Timekeeper pages each have a row of buttons at the top of the form. The Desktop Notes page has all of these options except for the **Batch Edit** button.



Reload Button

When you open a page, the Navigator is filled with a list of records from the database. This button manually re-queries the database and loads the Navigator.

Print Button



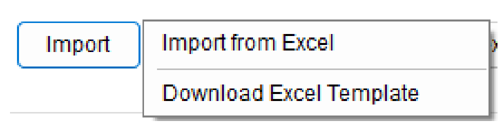
This displays two options (Desktop Notes only has the Print Report option).
NOTE: ONLY records displayed in the Navigator are printed. This allows filtering to reduce the data sent to the Print Preview window.

- **Print Labels** – This opens the **Label Printer** dialog where you can select the fields to print on each label, the type of label to print, etc. See the Printing Labels section of this guide for details.
- **Print Report** – This makes a text file from all of the records in a Field: Value format. The Print Preview window will display all records in the same order as listed in the Navigator. This gives you a hard copy of your data by letting you print it to paper or to a PDF file (most computers have the Print to PDF option). See the Printing Reports section in this guide for details.

Copy All Button

All records displayed in the Navigator are formatted into the same text as the **Print Report** option displays in the Print Preview window, and is put on the Windows Clipboard. You can open any other application and use Ctrl+V to paste the data into it.

Import Button



These options are available ONLY if you have a desktop version of Microsoft Excel installed on your computer. NOTE that **Desktop Links** has an additional option to import shortcuts from your desktop. See more about that in the **Desktop Links** section of this guide.

This import option lets you bring in data from another application through an Excel spreadsheet. Use the **Download Excel Template** to download a workbook from our support site with the instructions for gathering the data and formatting it for the import utility. You can copy and paste your data from another source into that workbook, or enter the information manually and save it. Click the **Import from Excel** option; you'll be prompted to choose that workbook and the data will be automatically imported into **1-Step Desktop**.

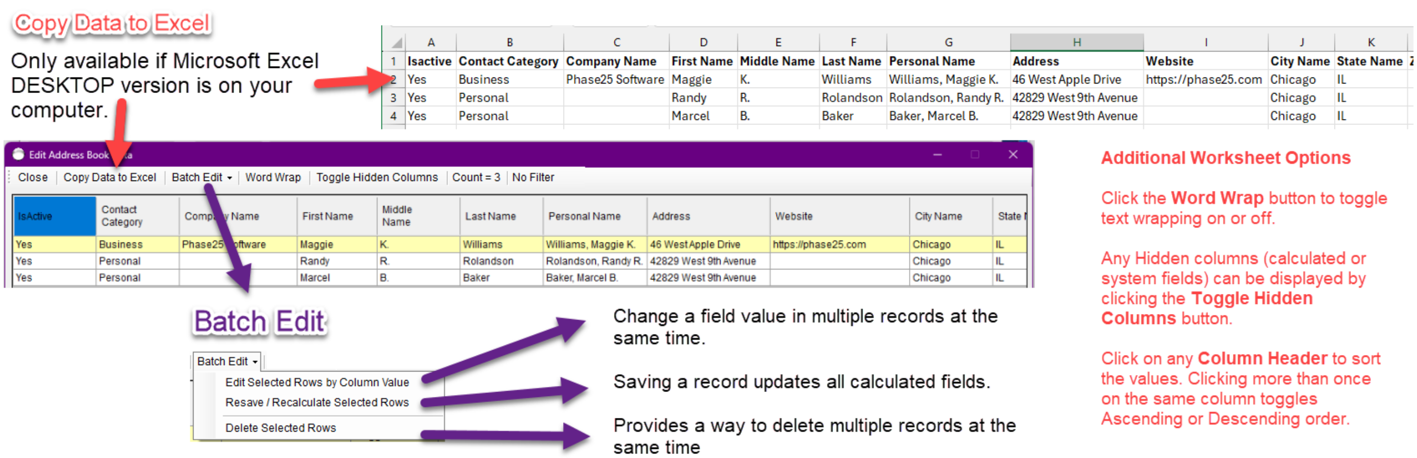
Export Button

If you have a desktop version of Microsoft Excel on your computer, all of the records currently displayed in the Navigator will be written to an Excel workbook (you'll be prompted where to save it). If you do NOT have Excel, the data is exported as a comma-separated-value file (.csv), which is compatible with other database applications.

Either of these export types (Excel or comma-separated-values) can be used to run a Mail Merge using MS Word. You can utilize the Mail Merge Wizard in Word to pull the data into letters or other documents. If you do want to Mail Merge to Word, use the **Field List** button on the Reports & Utilties page to export the actual field names and types to a report.

Worksheet Button

Click this button to display all of the records currently in the Navigator into a spreadsheet-like worksheet.

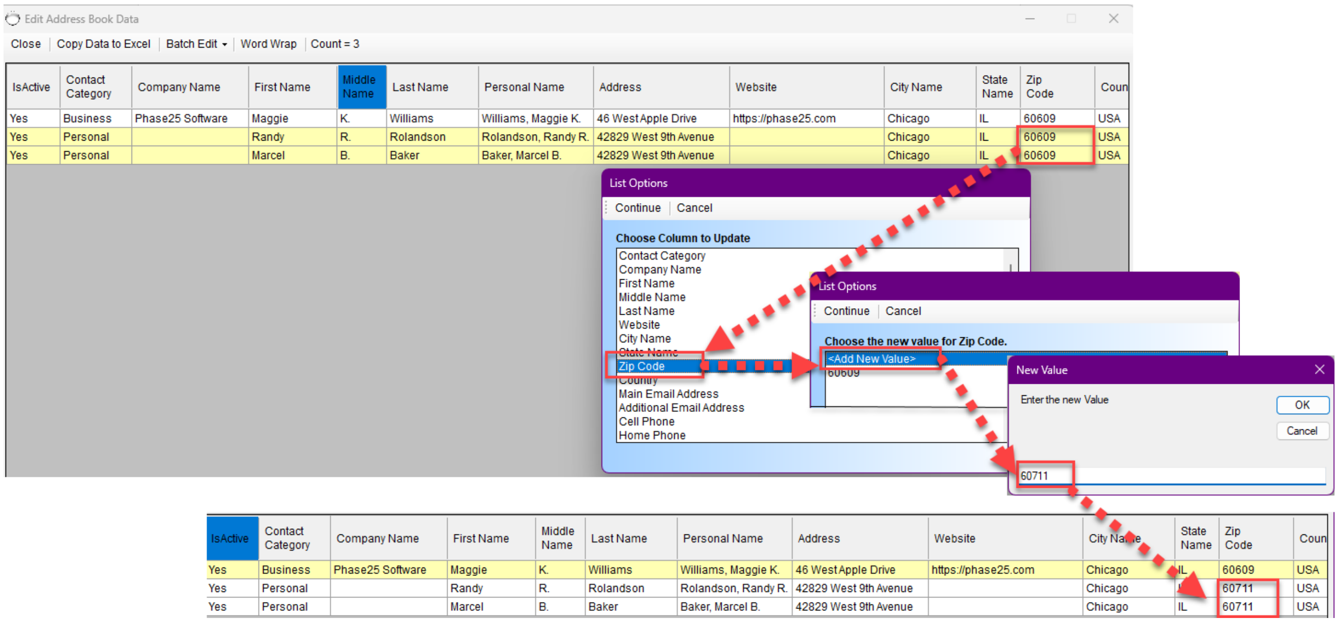


Worksheet Batch Editing

When you edit a record on the page, you're only changing that single record. The Worksheet's **Batch Edit** option lets you select multiple records (drag your mouse across contiguous rows, or use Ctrl+Click to select separate rows) and apply the same value to a field in each record.

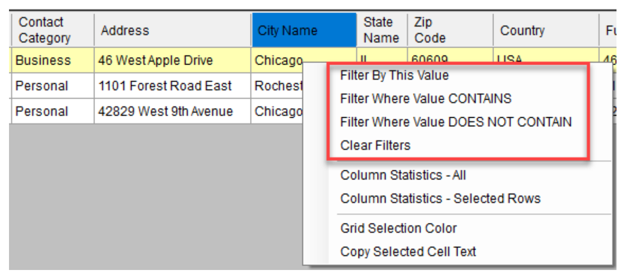
Here's an example: We want to change the Zip Codes on the two selected records, which are currently "60609".

- Select the two rows by dragging your mouse over them.
- Click the **Batch Edit >> Edit Selected Rows by Column Value**
- A list of all editable fields is displayed; click on **Zip Code**
- A list of existing Zip Codes is displayed; if the value you need is there, select it. In this case we need to add a new Zip Code. Click **<Add New Value>** and click **Continue.**
- Enter the new Zip Code: "60711", and click **OK**.
- The selected records are updated and displayed in the Worksheet. **NOTE** that the records on the page are also updated.



Filtering the Worksheet

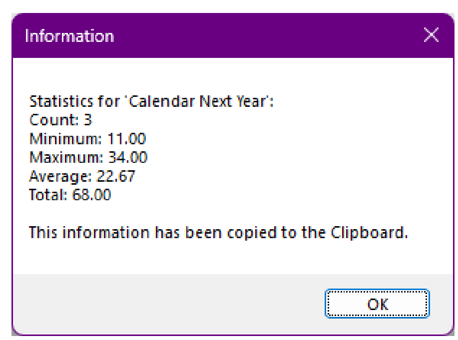
Click on a specific column and row to "select" the value in the cell, then right-click to open the popup menu where there are three Filter options:



- **Filter by This Value** – Displays only the rows with the same value you selected.
- **Filter Where Value CONTAINS*** – Prompts you to enter some text; only rows with that text in that column will be displayed.
- **Filter Where Value DOES NOT CONTAIN*** – Prompts you to enter some text; only rows where that column value does NOT have the same text will be displayed.

These filters can be stacked (you can use more than one at a time). Click the **Clear Filters** option to remove all of the filters to show all rows. If you filtered the Navigator when the worksheet was opened, that filter will still be active when you clear these filters.

*NOT Case-sensitive; not available for number or date columns.



Column Statistics

Right-click on a column and choose this option to have it show the aggregate values of the items in the column. You can also get the results from selected rows only by clicking on **Column Statistics – Selected Rows**. Based on the data type, you will have a message box popup with the results which is also copied to the Windows Clipboard.

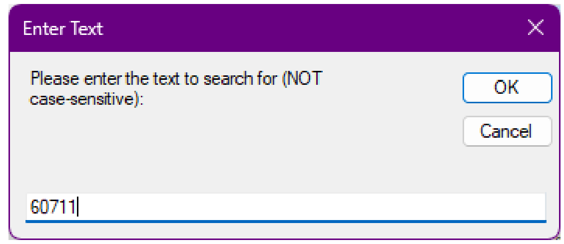
Worksheet Color Option

You can change the "selected row" color on a Worksheet by clicking the **Grid Selection Color** button and choosing a new color. Click in any cell in the worksheet and choose **Copy Selected Cell Text** to copy that text to the Windows Clipboard.

Copy Selected Cell Text

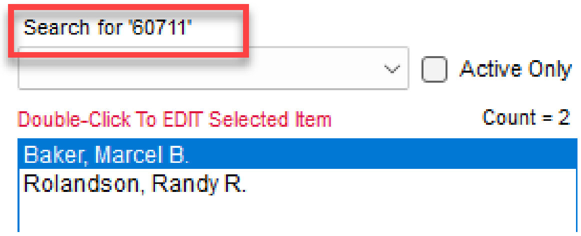
Click in any cell and use this option to copy the value to the Windows Clipboard.

Text Search



Use this utility to create a custom filter for the Navigator. You'll be prompted to enter the text to search for, which will look in all fields on every record in the database (NOT just the records in the Navigator). This option clears any previous filters.

Click **OK** to start the search.

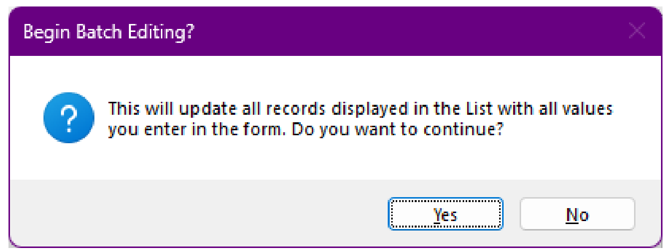


The Navigator is reloaded with the matching records and the Filter is displayed above the Filter Fields drop-down list.

Batch Edit

NOTE: This feature is **not** available for Desktop Notes.

This option lets you edit multiple fields for all of the records displayed in the Navigator. Use one or more Filter Options to reduce the list.

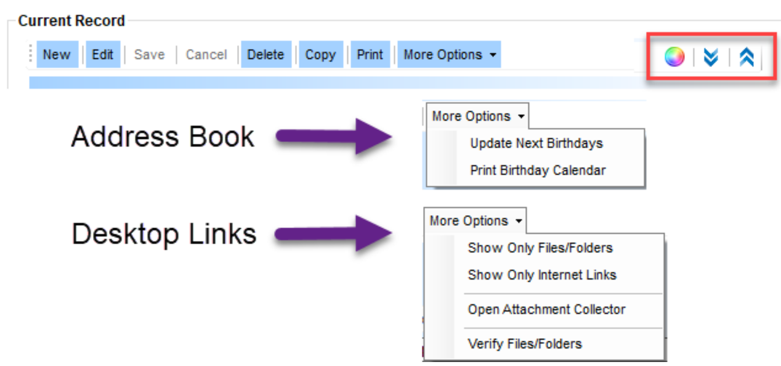


Click this button to start the Batch Edit. Click **Yes** on the prompt to continue, or **No** to cancel.

All of the fields on the form are cleared.

Changes made to all fields on the form will be applied to the list of records when you click the **Save** button on the toolbar.

Record Toolbar



When you click on a name in the Navigator the entire record is displayed on the form. **NOTE:** This feature is not used with Desktop Notes.

Use the **Record Toolbar** to:

- Add a **New** record – The form will clear and all non-calculated fields are editable and the Navigator and Button Toolbar are disabled.
- **Edit** the record displayed on the form – All non-calculated fields are now editable and the Navigator and Button Toolbar are disabled.
- **Save** the new record or changes made to an existing record, or,
- **Cancel** adding a new record or saving changes. Saving/Canceling an edit enables the Navigator again.
- **Delete** the record displayed on the form. Careful! There is NO un-delete!
- **Copy** the record displayed on the form. The new record will have the same name with a number appended to it. You should edit that record to make it unique as the copy number will be removed when you save it.
- **Print** the record. This displays the current record in the Field: Value format in the Print Preview window.

There are three buttons on the right side of the toolbar (see red box in above screenprint). The first is the Color button; use it to toggle the background color from the color you selected on the Utilities page and white.

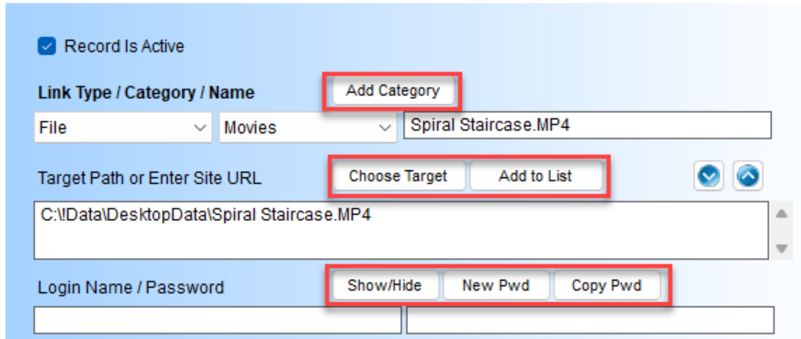
IF the form has a memo (unlimited text) field on it the Expand and Collapse button can be used to Collapse all of the memo fields on the form to shorten it, or Expand all memo fields again. These changes are saved and applied each time the page is opened.

More Options

Desktop Links, **Address Book** and **Timekeeper** each have a custom button on the Record Toolbar called **More Options**. These options are special functions that only apply to those pages. See the section on these for more details on what the options do.

Custom Buttons

Some fields have a Custom button above it that performs a task that only applies to that field. For example, in **Desktop Links**, there are six custom buttons! The **Add Category** button lets you add another Link Category value to the drop-down list. The **Choose Target** button opens a dialog to let you select a file or folder. There are three button above the Password field that adds actions for your password.

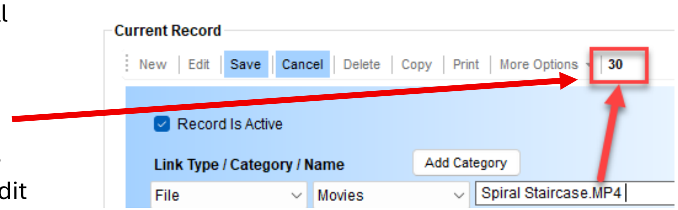


See the Feature section for details on how these buttons work. **NOTE:** This feature is **NOT** used by Desktop Notes.

Forms & Fields

When a form is being edited, you can double-click in a field to open a helper dialog which is based on what type of data it contains:

- Date fields open a calendar displaying the date in the field, or today's date if no date has been entered. Pick a date and click **OK** to update the field.
- Number fields open a calculator, displaying the current value (if any). The final result in the Calculator is copied to the field when you click **OK** to close it.
- Email fields – if there's an email address in the field a new Outlook message is created and populated with the email address in the "Send" field. (NOTE: Only if Outlook DESKTOP [Classic] is available and enabled in **Reports & Utilities**.)
- Website fields – if there's an URL in the field the website will open using your default browser.
- Text fields – all non-memo text fields have a limit on the number of characters you can enter. The "countdown" of available characters is displayed on the **Record Toolbar** as you enter the text. Double-click in a field to open a larger edit window.

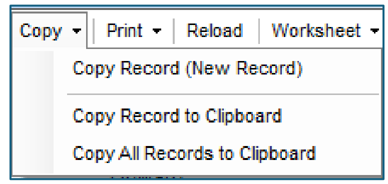


- Memo fields – These are larger fields that have no limit on the number of characters you can enter. However, each field has a **Collapse** button on the right side above it which will collapse the height of the field and hide the text, and an **Expand** button to open it again. These work independently for each field from the **Collapse/Expand** buttons on the **Record Toolbar**, which impact all memo fields on the form at the same time. All modifications using any of these buttons are applied when the page opens. You can double-click in a Memo field to open a larger edit window.
- All non-calculated fields – a dialog opens with the current text in a larger editable window. You can even change the font style and size in this dialog to make it easier to edit. Click **OK** to close the dialog and put the updated text back in the field.
- Each form has a Color button on the toolbar: . This button toggles the background color on the form between the color you selected on the Utilities page (which is applied to all forms) and a simple white background. Each forms choice is saved and applied the next time you open the application.

Worksheet Grids

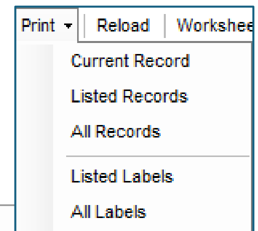
Address Book, **Timekeeper** and **Backup & Sync** pages have the capacity to store multiple related records. The Address Book supports adding people to the general household or company record. Timekeeper's grid at the bottom of the page keeps each individual range of time for that Task. Backup & Sync's grid supports listing more than one folder mapping for a project. The relationship between the record on the form and the rows in the grid is called a one-to-many relationship. One "parent" record, with one or more "child" records.

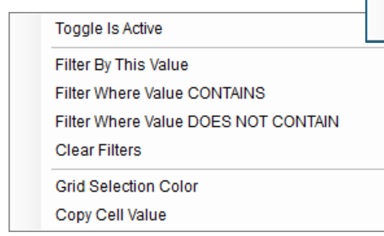
The toolbar on the grids work the same as on the form. Click **New** to add a new record; the form will open where you enter the data, then click **Save** to save the entry and close the form. The new record will appear in the grid. If any calculations on the main form (parent record) are based on child form entries, they will automatically recalculate.



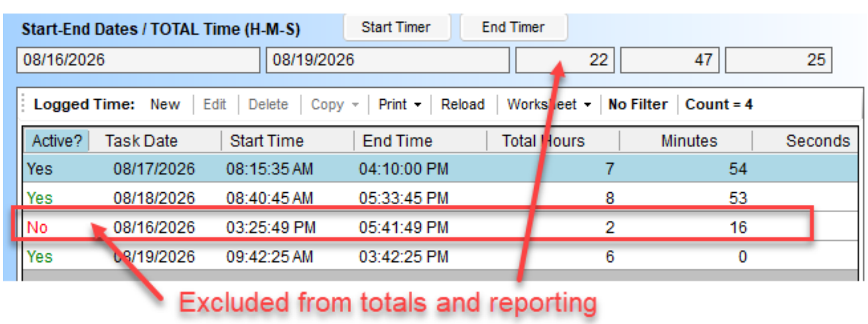
Additional grid features are:

- Double-click on a row to open it for editing.
- Multiple **Copy** options (see screen print) >>>
- Multiple **Print** options (see screen print) >>>
- The **Worksheet** button will display just those records in the grid or ALL rows from all parent forms.
- The **Active?** column is color-coded: Yes values are in green text; No values are red.
- Right-click on the grid for additional functions:
  - **Toggle Is Active** – select one or more rows in the grid and choose this option to change each row to the opposite "Yes" or "No" value
  - The **Filter** options are the same as on the main Worksheet.
  - **Grid Selection Color:** Sets the selected row color.
  - **Copy Cell Value** copies the selected cell text.





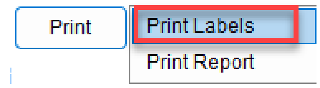
NOTE: If you deactivate a record on a form's Worksheet grid (Address Book, Timekeeper, Backup & Sync) (IsActive = No), that record will remain in the list, but will be excluded from any calculated totals on the parent (form) record, if any. It will also be excluded when printing any of the reports or labels.



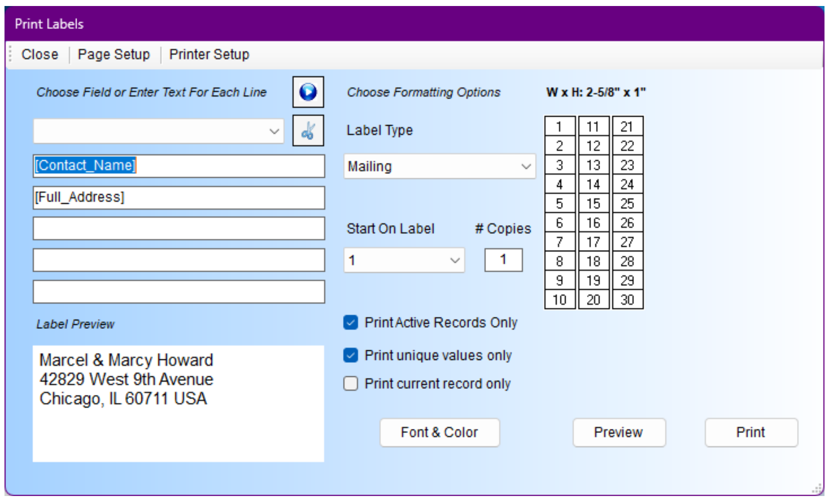
Appendix B - Printing Labels & Reports

Printing Labels

Desktop Links, the Address Book and Associated People, the Label Maker and Timekeeper features include a function to print labels. Click the **Print** button, then choose **Print Labels** to open the Label Printer dialog.



The next sections are using the Address Book as an example, but the **Label Printer** works the same way for any of these pages.

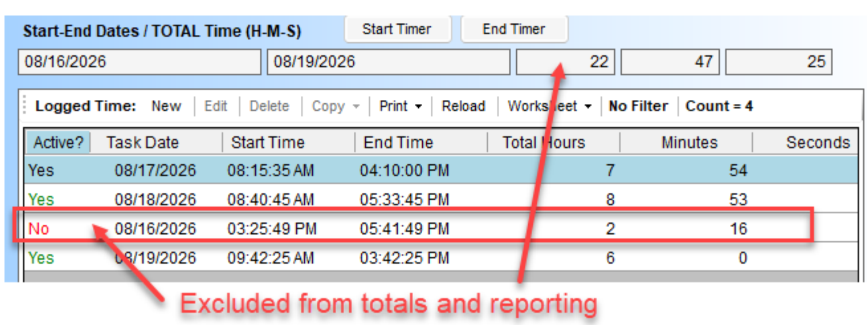


What Data Will It Print?

When you open the Label Printer only the data currently displayed on the form's Navigator will be used. In other words, you can filter the Navigator so that only a subset of data is printed. For example, you have records in the Address Book that are categorized by "Holiday Cards". When you want to print the labels for sending your holiday cards, you only want to print THOSE, not all other entries. Filter the Navigator where "Contact Category = Holiday Cards", and only those records will be used to print the labels.

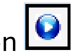
If you only want to print a label for a single specific record, select that record in the Navigator before opening the Label Printer. Whatever record is selected will be used in the **Label Preview** space in the lower left corner of the Label Printer dialog and also will be the only one printed IF the **Print Current Record** checkbox (7) is checked.

NOTE: If you deactivate a record on a form's Worksheet grid (Address Book, Timekeeper, Backup & Sync) (IsActive = No), that record will remain in the list, but will be excluded from any calculated totals on the parent (form) record, if any. It will also be excluded when printing any of the reports or labels.

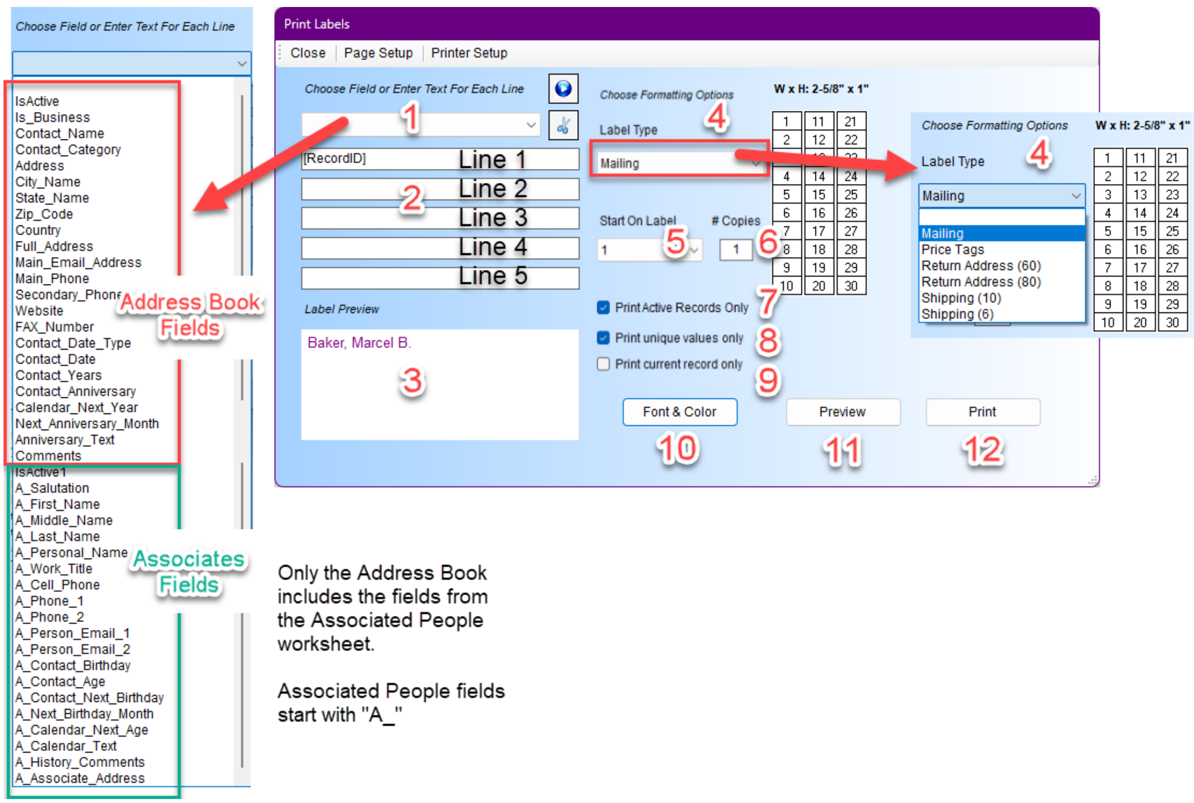


Formatting Labels

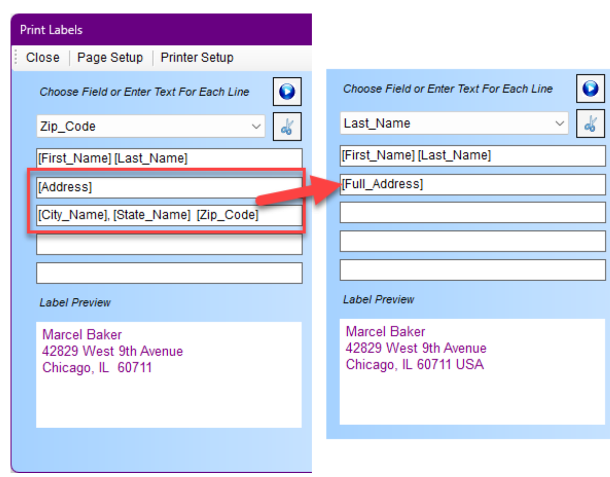
You can change the formatting for any label print job by changing any of the options of the Label Printer. All changes you make are saved and reapplied the next time you open the Label Printer.

There are two buttons in the upper left corner of the Label Printer: The blue/white arrow button  will replace any changes you make in Lines 1-5 with the default format, which is "[RecordID]". This is the same formula that creates the text you see in the Navigator on each form. The scissors button  simply clears Lines 1-5 if you want to start over. You can click in each of the Lines and clear them manually as well.

The Label Printer Functions



1. This drop-down list contains all of the fields from the form which are available to use on any line of the label. Click on the Line where you want the value to be printed, then click on a field name in the list. The field name will display the value from the current record in the **Label Preview**. You can add text or any punctuation in front of, between or after any of the field place holders in any of Lines 1 – 5. For example, you would add a space between the **City_Name** and **State_Name** fields, and then one or two spaces between the **State_Name** and **Zip_Code** fields. Also note there is a calculated (hidden) field called **Full_Address** on the Address Book that concatenates the full address for each entry. This field will format each address correctly even if any of the data for a field is empty. You can experiment with adding and removing fields by watching the changes in the Label Preview space.

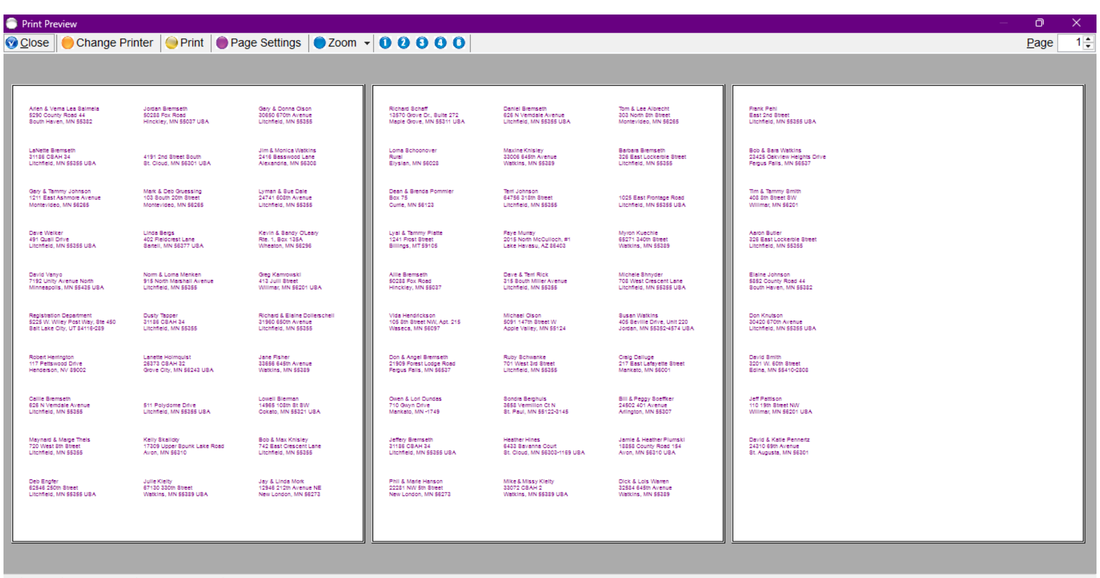


2. Lines 1 – 5 represent the lines on each label. Keep in mind that if you're printing smaller labels, such as Return Address Labels, there may not be room for all five lines. The Label Preview can give you an idea of how much available space there is as you change the font size, etc.

3. This is where every change you make in Steps 1 & 2 are displayed. This label uses the selected record in the Navigator so you can see how the data fits.
4. The **Label Type** drop-down list has these label size options:
    a. Mailing Label (30 on a page)
    b. Price Tags (50 on a page)
    c. Return Address (60 on a page)
    d. Return Address (80 on a page)
    e. Shipping (10 on a page)
    f. Shipping (6 on a page)

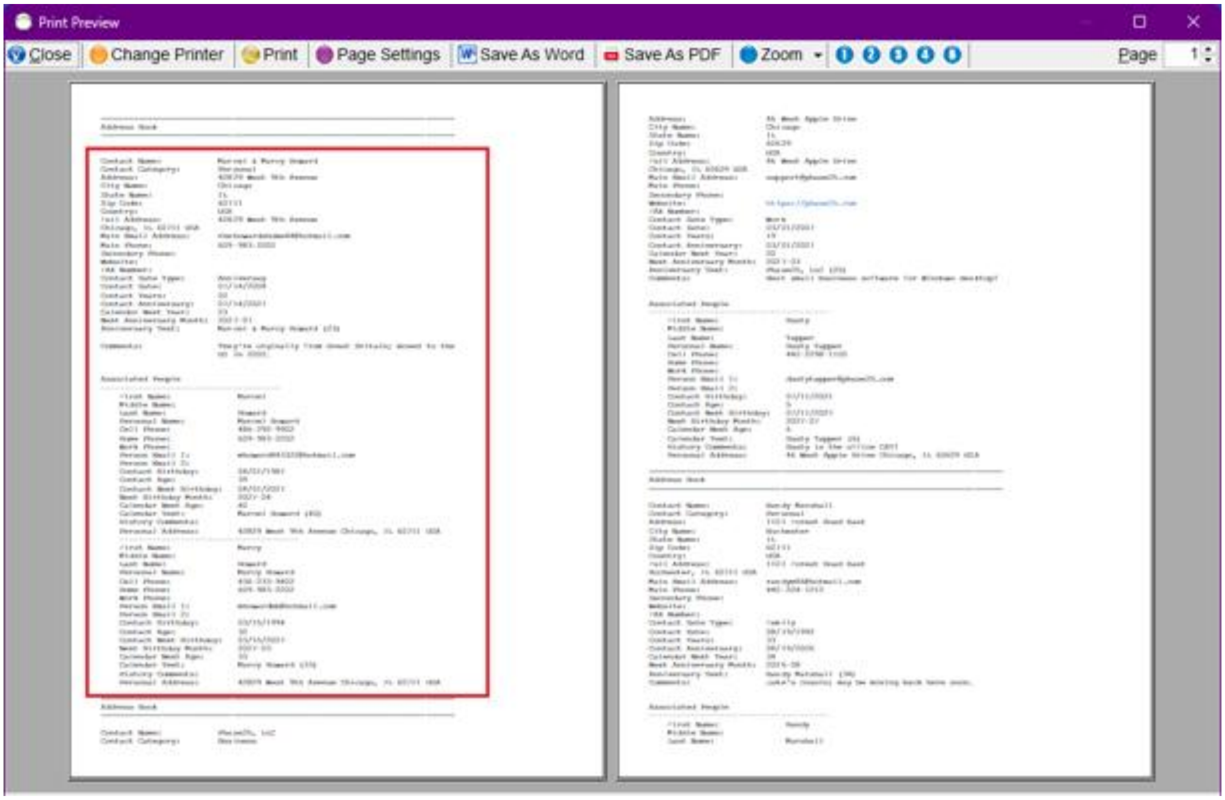
    When you select any of the options the label image on the right changes to show you how the blank page should look, the order in which the labels will be printed and the measurements (in bold black text above the image) of each label. You can use this size guide to determine which labels to purchase as most brands have these common label types.
5. **Start on Label:** If you have a partial page of labels, you can select the label to start printing on by selecting that number based on where it appears on the image. The first page of labels will start printing on that space, and any subsequent pages will start printing on Label #1. This option allows you to NOT waste a partial page of labels!
6. **# Copies**: Enter the number of copies of each label you want to print. Typically this would be one (1), if you wanted one label for each record. However, if you're printing Return Address Labels for yourself, you would change this to the number of labels available on a page. For example, if you're printing on a standard mailing label, enter 30; on one of the Return Address Label sizes, enter 60 or 80. Then be sure to check the **Print current record only** checkbox. When you preview the labels, you should see a full page of YOUR address filling each label space on the page. NOTE: On the Print Preview window you will have the option to print multiple copies of the same page, if you want more than one page of labels. Otherwise, you could multiply the number of **Copies** times the number of pages you want to fill out additional pages in the Print Preview window.
7. **Print Active Records Only**: If your data has the "Record Is Active" field (IsActive) in it, this option will be available to filter out any non-active (field is unchecked) records before showing the labels in the Print Preview window. This is helpful if you did NOT filter for only Active records when you started the Print process.
8. **Print unique values only**: This deduplicates the records based on the Label Preview template.
9. **Print current record only:** This prints just the label you see in the Label Preview window.
10. **Font & Color**. Click this button to change the Font style and color for the text on each label. The Label Preview will show your changes when you close the Color dialog.
11. **BEST PRACTICE! Always Preview your changes!** We recommend that you always preview the formatting you've selected to make sure the labels will print as you expect them to.
12. The **Print** button bypasses the Preview window and sends the pages right to your printer.

The **Page Setup** and **Printer Setup** buttons on the toolbar are standard Windows printing options. These can be set here, or on the Print Preview window. Below is an example of how labels appes appear in Preview:



Printing Reports

Each page has an option to print the data in a Report format. Click on the **Print** button, **Print Report** to display the data for the records selected in the Navigator.   This is a very simple text-based formatted report, with just the field name and value for each record. For example, this is the Address Book:



The toolbar has options to save this report as a Word or PDF document IF you have the Microsoft Word option enabled in **Report & Utilities**.

The **Copy All** button on each page copies the same text you see in this report to the Windows Clipboard, giving you the option to paste the data into another application or email.

Custom Reports

Several features have custom reports that arrange the data for printing and copying in a specific format. These are the custom reports:

- **Address Book** >> More Options >> Print Calendar. This is where you can start the process of printing a calendar that uses the Calendar Date / Birthday Date fields.
- **Timekeeper** >> Print (Button Toolbar) >> Print Time Report. This format can be used to submit billable time to a client and displays data from all of the records currently in the Navigator. Use the **More Options** >> Print Time Report option to print just the current record in the same format.

Appendix C - Downloading & Installing 1-Step Desktop

All Phase25 Software products are built on the latest Microsoft technology and will install and run on any **Windows 10 or 11** system that meets the basic system requirements.

NOTE: Phase25 Software products do not install or run on Macintosh (macOS) systems.

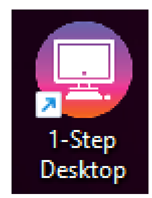
To Upgrade a Trial Version: All Phase25 software products are available via download from our website at https://phase25.com. Click on the download link on the Product page. This will give you the full release (all features) to try for 30 days without purchasing a license. If you have a prior version installed you should uninstall it before installing the new download.

We offer free upgrades to our licensed users! Just click the **Update** button on the **Reports & Utilities** page to see if a newer version exists. If it does, just follow the prompts to update your application. You don't need to uninstall your current version, and your database will not be impacted or changed.

Running the Installer

When you download the installer it is saved to your "Downloads" folder with a .zip file extension. This means the installer is compressed (zipped) and you will need to unzip it to get to the actual installer program. Follow these steps:

- Copy or move the "1StepDesktop_Installer.zip" file to your desktop
- Right-click on the .zip file and choose "Extract All". **YOU CANNOT RUN THE INSTALLER BY DOUBLE-CLICKING ON THE .ZIP FILE TO SEE WHAT'S INSIDE.**
- Check the **Show extracted files when complete** checkbox and click **Extract.**
- The open folder will show the installer (.exe) file, called "1StepDesktop_Installer_91_nnnn" where "nnnn" is the current Release number.
- Right-click on this .exe file and choose **Run As Administrator**.
- Answer "Yes" to any security prompts. As long as you see the **Verified Publisher** is "Phase25, LLC" you know the file is safe to run.
- Follow the installer prompts.
- The **1-Step Desktop** icon will be on your desktop!



Registering Your License Key

When you use the unlicensed, 30-day trial version, each day you will see the "count-down" on how many days are left before the trial period ends. Before that happens, purchase a license key on the 1-Step Desktop page by clicking the **Add to Cart** button. When your purchase is complete, we will email your License Key to you.

Open 1-Step Desktop, and when asked for the key, copy and paste it from the email into the prompt. You should get a message that your product is now unlocked and the key is registered.

The License Belongs to YOU!

This license is issued to you the buyer, not your friends, relatives, co-workers or casual acquaintances. This means you can install 1-Step Desktop on any number of computers that YOU use. If you enjoy 1-Step Desktop, GREAT! Spread the word, share our website, but please ask others to support us by purchasing a legal license 😊. See our EULA (End-User License Agreement) for details.

Visit our website for additional guides and video tutorials: https://phase25.com.

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.

NOTE: Phase25 Software products do not install or run on Macintosh (macOS) systems.

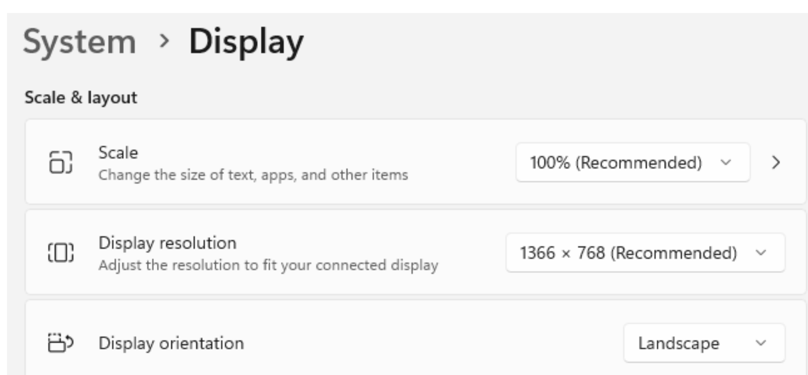
User (Workstation) Hardware Requirements

- 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 Office 2016 (or newer) or Office 365 DESKTOP Version (for integration with Word, Excel & Outlook utilities; Outlook is named “Classic”). If a desktop version of Office is NOT on your computer, these features will be disabled:
    - Import data from Excel
    - Export data to Excel (can still export to comma-separated values file [.csv])
    - Workbook option to “Copy to Excel”
    - Double-click an email address to auto-create an Outlook message
    - Mailbox Collector (gathers files to attach in an Outlook message)
    - Text Search in Word, Excel and PDF files (can still search Text files)
    - Text Search in Outlook (all features)
- High-Speed Internet Connection (for updates and remote support)
- Other computer hardware less than 3 years old.

Display Recommendations

1-Step Desktop opens to a “best fit” size for the features in it. You can resize it to a larger size by dragging the corners out or by clicking the Maximize button on the top border to fill your entire screen. However it maintains a minimum size of 1150 pixels wide by 710 pixels in height so that smaller resolution screens can still display the application.

We recommend you keep your System Display settings at their recommended values (see image at right). Changing the Scale and/or Resolution to settings not supported by Windows may distort the 1-Step Desktop forms and pages.



Where Your Data Is Stored

When 1-Step Desktop opens for the first time a SQLite* database is created in your Documents folder. All data you enter in Desktop Links, Backup & Sync, Address Book, Label Maker, Timekeeper and Desktop Notes will be stored in this database file:

C:\Users\<your login name>\Documents\1-Step Desktop\1-Step_Desktop_Data.sdb.

You can use this startup database or if you want to move it to another folder on your computer, you can do that in Windows Explorer, just like moving any other file folder-to-folder. Only a couple of rules around that:

1. Close the application before moving the database.
2. Do NOT move the database into a folder that's linked to online file storage, like Google Drive or OneDrive. **Why Not?**
    a. Because every time you save data (a record) to your database, the online service will see that the file is changed and try to upload it to the cloud, slowing your computer's processing and possibly locking the database until the "sync" is done.
    b. When that happens, you may experience hang ups in the application or even lock ups where you must restart the application to get a connection with the database again. A worst-case scenario is that you lose your changes or corrupt the database.
    c. As your database grows, the time to "sync" that file to the cloud will increase and cause further disruptions in the application.
3. After you move the database, the application will not find it the first time you open it again. Use the **Main Menu >> Reports & Utilities >> Open Existing** button to reconnect it.

You can see the current database's file path on the top of the **Reports & Utilities** page.. You can open the file location (folder) where it resides by clicking the **Open DB Folder** button on that page.

See the Chapter called **Reports & Utilities** for information on managing your database.

* A SQLite database 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.

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