

Profits Quick Start Guides



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QuickView Utility

Purpose/Overview

The QuickView utility is designed to provide quick access to some of the Profits master files. These files contain information that could be useful throughout the day, if you could access it quickly without having to start the entire Profits system. It also provides a way for you to access the data when you are already in Profits but do not wish to exit the screen you are in to locate the information.

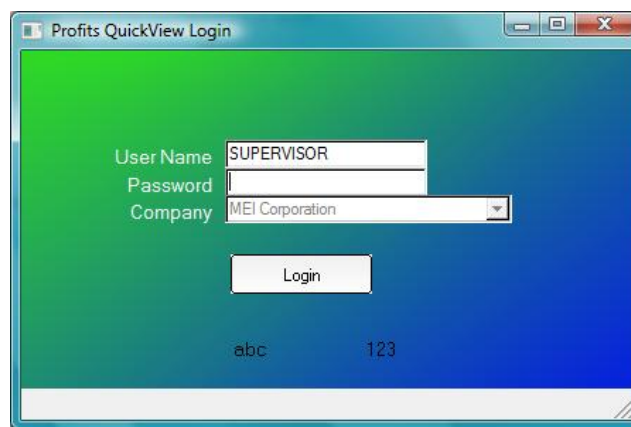
The QuickView program was added to Profits v4.4.1. If you are not currently at this version, or above, please contact PCS at 770-569-2900 to schedule an upgrade. This is a no charge upgrade to all users who are currently under a support contract and are currently at V4.0 or above. You can download the program at <http://pcsinfo.com/customer-area.html>. Sign in and click on the View Public Files link. Then right-click QuickView.exe and select Save As, and save the program to your Profits folder.

How to Start the Program

The easiest way to start the program is to place an icon on your desktop or in your quick launch toolbar. To create this icon you should right-click on an empty place on your desktop and select New>Shortcut. Then click on the browse button and browse to the location where Profits is installed and click on the QuickView.EXE file. This will most often be located on a file server. The path should look something like, G:\PROFITS\QuickView.Exe. Click Next, and enter a name for the shortcut, something like “Profits QuickView”.

If you want to put the shortcut in the quick launch toolbar, right-click the icon and drag it to the quick launch toolbar and release the right mouse button. Select Move if you want to remove the icon from the desktop and have it only show in the toolbar. Select Copy if you want the icon located in both locations.

You can now easily start the program by simply clicking on the icon. When the program starts you will be asked to login, similar to the standard Profits login. You should use the same User Name and Password that you use for Profits.



Once you are logged into the QuickView utility, you will see the QuickView menu. This menu can be left on your screen or minimize it to the notification area of the taskbar. If you press ESC, while the QuickView menu window is active the program will remain loaded, but will be sent to the Notification bar located down by the time.



You will see the Profits logo. To bring the menu back up simple click on the icon and the menu will return to your screen. This allows you to keep the program running all day long without it getting in your way.

Also the program does not keep any files open while it is sitting idle. Then you click on one of the menu options, it will briefly open the selected master file to build a table of the data and then immediately close the file again. This will help minimize conflicts with programs such backup routines.

How to use the Program

To use the program you need to make the QuickView menu your active window. You can do this by clicking on the icon in the Notification Area, if it is not already on your screen. If the menu is already displayed on your screen, simple click it to make it active.

You can now click one of the buttons on the menu or use ALT+ the underlined letter to view the desired data. For example, press and hold ALT plus the C key to bring up a list of your customers, or ALT+I to view your inventory items.

To remove the menu from your desktop, but to keep it active, press the ESC key. This will hide the menu until you need to use it again. If you wish to close the program totally, press the F9 key instead. You can also click on the X located at the top right of the menu.

When you click one of the buttons a new windows will be displayed on your screen. Depending on your system and the amount of data it need to load, this should happen almost instantaneous or within a few seconds.

Customer #
Name

Customer Number	Company Name	Phone	FAX	City	Zip
DLSINDUS	D.L.S. INDUSTRIES	(000) 000-0000	(000) 000-0000	NORCROS...	30071
DRBUCKLE	D.R. BUCKLEY	(319) 386-0340	(000) 000-0000	DAVENPOR...	52906
DAEMYONG	DAEMYONG APPAREL CORP., LTD	(809) 923-4309	(809) 937-0838	KINGSTON...	JAMAICA
DAEHOLL	DALE HOLLOW APPAREL	(931) 864-7250	(000) 000-0000	BYRDSTO...	38549
DALEHOC	DALE HOUGHIN	(000) 000-0000	(000) 000-0000		
DANADESI	DANA DESIGNS, INC.	(408) 587-4188	(408) 585-9284	VASHON IS.	98070
BECTION	DANIEL A. BECTION	(904) 448-0834	(000) 000-0000	JACKSONV...	32241
DATAAPPL	DATA APPLICATIONS	(501) 443-2269	(000) 000-0000	FAYETTEV...	72703
DATACHOI	DATA CHOICE	(615) 691-9450	(000) 000-0000	KNOXVILLE	37922
DATACONV	DATA CONVERSIONS	(314) 532-3666	(000) 000-0000	CHESTERF...	63006
DATAMANA	DATA MANAGEMENT SERVICES	(818) 884-8951	(000) 000-0000	CANOGA P...	61304

Records Processed:

Once the table is loaded and displayed on your screen you can scroll up and down the information using the scroll bar located to the right of the records. You can also type information at the top of the screen. As you type the data grid will move showing you the records that match the information you have typed. The more characters you type the closer you will be to a matching record.

Once you find the record you are looking for, you can see a more detailed view of the data by double-clicking the line. When you do this a new window will appear showing more information. Depending on the amount of information to be displayed, it might be "Tabbed" and you can view additional information by clicking each tab. The customer record is one example of this.

Customer #

DANA DESIGNS, INC.
ACCTS PAYABLE/K2 CORPORATION
19215 VASHON HWY SW
VASHON ISLAND WA 98070

Primary Phone
FAX Phone
Contact

General | Credit | Contact Info |

Tax004 Tax Area

Statements
 Late Charges
 Auth. Required
 Account Active

Terms
Price Level
Ship Instructions
Salesman
Invoice Type

	Current Month	Year-to-Date	Last Year
Orders	0	0	0
Sales Dollars	80.00	80.00	80.00
Cost Dollars			

Customer Detail

Customer No:

DANA DESIGNS, INC.
 ACCTS PAYABLE/K2 CORPORATION
 19215 VASHON HWY SW
 VASHON ISLAND WA 98070

Primary Phone: (408) 587-4188
 FAX Phone: (408) 585-9284
 Contact: ACCTS PAYABLE

General | Credit | Contact Info

AR Contact: Phone: (408) 587-4188 FAX: (408) 585-9284
 Acct. Opened: Dec 01, 1998 First Order: Jan 01, 1900 High Credit: \$2,537.53 Credit Limit: \$500.00

Date	Amount	Inv/Order #	Salesperson
Last Sale: Nov 02, 1998	80.00	0	DELETED SALESMAN TOTALS
Last Order: Aug 24, 1998	80.00	0	DELETED SALESMAN TOTALS
Last Quote: Nov 12, 1998	\$3,750.00	7335	DELETED SALESMAN TOTALS
Last Credit Memo: Nov 30, 1999	\$282,025,282.00	0	-
Last Payment: Mar 17, 1988	9500.00	0	

Balances

Unbilled	80.00	Avg Payment Days	0
1 - 30 Days	80.00		
31 - 60 Days	80.00		
61 - 90 Days	80.00		
91 - 120 Days	80.00		
120 + Days	80.00		

Customer Detail

Customer No:

DANA DESIGNS, INC.
 ACCTS PAYABLE/K2 CORPORATION
 19215 VASHON HWY SW
 VASHON ISLAND WA 98070

Primary Phone: (408) 587-4188
 FAX Phone: (408) 585-9284
 Contact: ACCTS PAYABLE

General | Credit | Contact Info

First Name	Last Name	Position	Phone	Ext.	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	(408) 000-0000	0000	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	(408) 000-0000	0000	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	(408) 000-0000	0000	<input type="text"/>

To close the detail view and return to the data list, simply click the Close button or press ESC. If you press ESC a second time you will close the data list view, and the third ESC will hide the QuickView menu.

You can also use the QuickView menu as a quick way to start Profits. Just click on the Profits button or press ALT+P while the QuickView menu is the active window.

FAQ

- Q.** When I view my inventory some users see Costs and others do not, why?
- A.** The QuickView program checks the users security rights when the program starts. If this workstation is set to not allow cost access at order entry, then QuickView will hide this information. You can adjust this setting by logging into Profits as the SUPERVISOR and going to menu 1.5.4 on the workstation that you wish to change. It is controlled by the option “Allow Cost at O.E.”. This will also affect the QuickView Customer screen.
- Q.** Will the QuickView program hang if I try to view a record that is in use by another user?
- A.** No, QuickView opens the files in INPUT ONLY mode. This allows us to read the data even if it is locked by another user. This also prevents users of the QuickView program from being able to update the Profits data files. It is a VIEW only program.
- A.** Will this program prevent me from getting a good backup of my Profits data files?
- Q.** In general No. The program opens the files for only a few seconds to access the data then closes them. If you are using the Profits menu to perform your backup, or a similar product that has the capability to backup open files you should be fine. The Profits backup routine will backup open files. You might see a warning box that a file is in use, just click Ignore and the program will attempt to backup the open file. At the end of the backup you will be notified if the program was not able to backup the file.