SpiritWorks Software Inc.

Commercial Rental Tracker Plus
Tenants, Rental Units, Rental Income & Expenses,
Tasks, Contacts, Schedules, Assets & Work Orders

100% CLEAN
NO SPYWARE
NO ADWARE
NO VIRUSES
SOFTPEDIA
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Tips for getting started with
Commercial Rental Tracker Plus

Commercial Rental Tracker Plus
SpiritWorks Software
Complete Long Term Commercial Management
10 Day Free Trial for Mac & Windows

Here are step-by-step directions for:

- **Using Commercial Unit Tracker**
- **Using Commercial Tenant Tracker**
- **Using Rental Income Tracker**

Plus tips on using the other components:

- Navigation & Common buttons
- Reports
- **Rental Expense Tracker**
- **Other Income Tracker**
- **Asset Tracker**
- **Work Order Tracker**
- **Contact Tracker**
- **Schedule Tracker**
- **Task or Goal Tracker**
- **Universal Calculator**
- Preferences
- Backing Up and Recovering Missing Data

Using Commercial Unit Tracker

1) First create Unit records for each of your units. Start by choosing **Commercial Unit Tracker** from the **Commercial Rental Tracker Menu**. Then click the **New** button. A new **Rental Units** window will open that lists your Buildings and Units.

2) In this software, **Units** are buildings or parts of buildings that are available for rent. **Buildings** are logical collections of Units. If you have one or more multiple unit buildings, click **Add Building** in the lower left corner of the **Rental Units** screen. You will be asked for the name of the building and then you will be asked to pick a unit type. The choices are Suite, Office, Room, Unit or Other.

2a) To add a **Unit** to a Building, click the name of an existing Building and then click **Add Unit(s)**. You will be asked if you want to add one or more units to the

building. If your units are sequentially numbered (ie, 1,2,3,4,5) then you can use the **More than one** feature. If they are not sequential or have alpha designations (ie, 1a, 2b, room, etc.) then you must choose the **Just one** button.

- If you choose the **More than one** feature, you will be asked for the number of the first and last unit in the building. You will next be asked for the street address, which will be appended with the apt or room number and entered into the first line of the Address field. Next you will be asked for the City, State and Zip which will also be added to the Address field on the new Rental Unit record.
- If you choose the **Just one** option, you will only be asked for the name of the new unit. Then you will need to fill in the rest of the required information for the new Commercial Unit record.

2b) To add a Unit that is not part of a Building, make sure there is no building selected in the **Rental Units** window and then click **Add Unit**. You will be asked for the name of the new unit. Use an abbreviated form of the address (ie, 1234 Main) or a nickname. Then you will need to fill in the rest of the required information for the new **Commercial Unit Tracker** record.

Note: We suggest you create all unit records first and then assign
Units to the Commercial Tenant Tracker records as you create them.

3) Enter the mailing **Address** of the unit, choose the **Unit or Building Type,** and then click the **Add/Select Manager** button. If all your units are managed by the same person you can save this step until you have all your unit records created. You will be asked if the manager is the same for all units. After creating a new manager, click the **Description** button in the **Managers/Owners** window and fill in the address and other information.

4) Enter the total area of the building into the **Building Sq. Ft.** field (If you prefer Sq. M. then click Prefs, then Formats, then Kilometers.) and the useable area into the **Useable Sq. Ft**. field. Next click the **Description** tab and enter the total common area of the building into the **Com. Sq. Ft.** field. You can also add a **Photo** of the building by clicking the button above the **Unit or Building Type** menu. (Photos are not stored in the software and must remain in the original location on your computer to be displayed.)

5) Fill in the other fields in the **Description** section including: **Zoned, Roof, Foundation, Walls, Heating & A/C Type, Lighting, Reconditioning Details** and a **Description** of the building. You might use this last field for an advertisement about the building. There are also three options to choose from: **Build to Suit?, Can Sublet, or Options?** (to buy at the end of the lease?).

6) At the bottom of the screen is a **Primary Unit** option with a **Go To** button next to it. Each building, whether it is just one unit or many units, should have a Primary Unit. The Unit Cost, Ownership and Property Tax, A/C Service Date and Liability Insurance information only need to be entered once on the Primary Unit record for the building. You can go directly to the **Primary Unit** record for a Building by clicking the **Go To** button.

7) Click the **Assets** tab to assign furniture, appliances, and other assets to the rental unit. You will be asked for a Description, Make and Model, and a Serial Number. You will then be asked if you want to continue working in **Asset Tracker** or return to **Commercial Unit Tracker**. If you continue working in **Asset Tracker**, when you are finished, return to the unit record by choosing **Commercial Unit Tracker** from the **Commercial Rental Tracker Menu**. The **Update Assets** button automatically adds and updates all the assets (from **Asset Tracker** records) in the Assets for this Unit field.

8) In the Expenses section, you can indicate who the **Property Taxes are paid to**, the **Amount Paid per Year**, the next **A/C Service Date**, who your **Liability Insurance is Paid to**, the **Amount paid** and if you pay **Per Year or Per Month**. You can also choose if you want the **Expenses** or **Utilities Distributed** among all the Units or if they each will pay separately.

9) Click the **Notes/History** tab and enter any notes about the unit in the field provided. Here you will find the **Unit History** field which lists each Tenant that has occupied the unit, and when they moved in and vacated it.

10) Click the **Unit Cost** tab and fill in the **Purchase Date, Purchase Price, Reconditioning Cost, Amount Financed** and other information about the mortgage including your mortgage **Payment** and the **Balance Due**. Then you can use the **Add Payment to Expense Tracker** button to create a mortgage payment in Rental Expense Tracker.

11) Next click the **Ownership** tab. Add the name(s) of the **Owner(s)** and their percent ownership, for tax reporting purposes, by clicking the **Add/Select Owner** button. Click **Show Contributions** and then **Add Contribution** to specify how much money an owner has contributed to the project. Click **Show Distributions** and then **Add Distribution** to specify how much money an owner has taken out of the project. These numbers are all totaled in the **Overview**.

You can specify what **Terminology** you want to use for reports by choosing between **Owner, Partner, Investor and Member**. This choice effects all your units. Another preference you can set here is if you **Always want to Go To the Primary Unit** when you click the Unit Cost or Ownership tab buttons.

Owners and Managers are grouped together since the owner and manager might be the same person. You can add contact and other tax information about the owner or manager by choosing one from the list and then clicking the **Description** button.

12) Click the **Tenant** tab and choose or create a Tenant by clicking the **Add/Select Tenant** button. The list of tenants comes from Commercial Tenant Tracker. You can add, modify or delete tenant records from this dialog. When you

click **Choose Tenant**, the **Rent Due Date, Lease Exp. Date, Yearly Lease, Base Rent, Expenses** and **Utilities** are all added automatically.

The Base Rent is calculated based on data on the Commercial Unit Tracker record and is also entered automatically. After clicking **Create Receipt** on a Rental Income Tracker record, the **Expenses Paid Last Month, Utilities Paid Last Month** and **Total Rent Paid Last Month** on the Commercial Unit and Tenant Tracker records will all be filled in for you.

To add more than one tenant to a Unit, click the **Multiple Tenancy** button. The Tenant field will expand to accommodate any number of tenants. Use this feature only if each tenant has a separate rental agreement. If all tenants appear on the same rental agreement, then use the **Additional Lease Names** feature in Commercial Tenant Tracker. If you need to delete a tenant from the list, click the tenant and then the Delete Tenant button that appears.

Go to the tenant's record to add or edit information by clicking the **View** button above the Tenant field. If the **Multiple Tenancy** button is checked you need to click on a tenant to show this button.

13) Click **New** again and enter the information for your next unit. This is a one time investment of your time that will enable you to use this time-saving software.

Using Commercial Tenant Tracker

In Commercial Tenant Tracker (accessed by by choosing it from the **Commercial Rental Tracker Menu**) click the **New** button. A **Tenants** window will open where you can add, modify and delete tenant names. Click **Add Tenant** and enter the **Company Name** and **First** and **Last** names of the new tenant.

1) You will next be guided through entering the rental information for the new tenant including: **Deposit** amount, if the Deposit has been paid, the **Lease Exp.** date (enter MTM for month to month rentals), the **Late Charge** (if you charge a daily charge after the late date, enter the primary charge followed by a comma and then the daily charge. For example, if you charge $25 plus $5 per day after the Late date, enter $25,$5), if the rental period is Weekly, Fortnightly (every two weeks), Multi-month (longer than one month) or Monthly, the **Rent Due on** date (usually the 1st of the month) and the **Rent Late On** date**.**

2) Click **Add/Select Unit** and choose the unit for the tenant. The **Base Rent** amount is automatically calculated based on data from Commercial Unit Tracker. If you have several Tenants in one Unit, you have two options. First you can use the **Additional Lease Name(s)** field (in the **Information** section) to add other tenants to one lease. If each tenant has their own separate lease then click the **Multiple Tenancy** option on the Commercial Unit Tracker record, and add all the Tenants from there.

> Multiple Units for one Tenant is not supported in this software. You can work around this by having multiple Tenant records for the same Tenant (add a middle initial or name to differentiate the tenant records).

3) Next enter the **Moved In** date. The software uses the Moved In date to determine how many months of payments to look for in determining if rent is past due and what the balance due is. So you need to pick the first date that you want to enter the historical data for as the Moved In date.

You can also enter a **Default Moved In** date in the Commercial Tenant Tracker Prefs window (click **Prefs** and then **Tenant Tracker Prefs**) and then enter the actual moved in dates on the individual Commercial Tenant Tracker records. You can also enter the actual moved in date into the **Unit History** field in Commercial Unit Tracker.

> Most people don't want to go back very many months, so they just enter a fairly recent Due Date as the Default Moved In date. So, for example, if you start using the software in March and you want to

include historical data for February, then the **Default Moved In** date should be February 1 (or the first day of that rental period).

You can enter the actual Moved In date for recent and future tenants. This date is automatically entered into the **Unit History** field in Commercial Unit Tracker.

4) Next click the **Deposit Details** button and indicate if the Deposit has been paid, and if so, on what date. You can also indicate if the deposit has only partially been paid and when the deposit was returned to the tenant after moving out.

5) Recurring charges can be added to the rent each month by clicking **Add/Select Charge**, then selecting a charge and clicking **Choose Charge**. Use **Create Charge** to add new charge types.

6) If your tenant has a balance due or credit, enter the amount in the **Balance Due** field (put a minus sign before any credit amount). This amount will be added to the Rental Income Tracker **Charges** field automatically.

7) There are several other fields in the **Information** section including: **Additional Lease Name(s) & Home Address** (any other information you want added to Tenant Notices and Receipts), **Emergency Contact Name, Emergency Number, Email Address, SS# or Tax ID#,** and an **Other Phones** field. There are also three **Misc** fields that you can use to keep track of other information. Click the **Change** button above these fields to change the label on all the records.

8) In the **Expenses** section you can add expense types (from Rental Expense Tracker) to the **Expenses to be paid or shared by this tenant** field by clicking **Add Expense**. You can also choose if you want these expenses to be shared (by clicking **% of Expenses**) with other tenants in a building, or if you want **% of Utilities & Other Charges** (listed in the **Utilities & Other Recurring Charges** field in the Dates/Charges section) to be distributed with other tenants in the building.

If there is a Property Tax **Amount Paid per Year** in the Expenses section of Commercial Unit Tracker, then "Property Taxes" will appear in the Expenses to be paid... field.

If there is a Liability Insurance **Amount Paid** in the Expenses section of Commercial Unit Tracker, then "Liability Insurance" will appear in the Expenses to be paid... field.

When **Create Receipt** is clicked in Rental Income Tracker any Expenses from Rental Expense Tracker that are paid will be added to the **Expense paid by this tenant** field.

9) In the **Payments** section you can generate a **Payment History Report**, or use the **Lease Generator** (this generic template can be modified for your use). There is also an **Automatically Create Payment** option for use with tenants who have some kind of automatic payment.

10) Keep any amount of notes in the **Notes** field. Notes about Metered charges are added to this field and must not be removed. Also in the **Notes** section is a **Waiting** option which is used for potential tenants who have not moved in yet. You can also create a **Waiting List Report.**

11) At the bottom of the Commercial Tenant Tracker window are buttons for creating a **Late Notice,** or **Tenant Notice** (any sort of letter to be addresses to the tenant. There is also a **Rent Roll** button which produces a report showing all your tenants and if they have paid their rent. This button also indicates if the rent is **Due** or **Late** by marking the options next to the button.

Using Rental Income Tracker

1) Now open Rental Income Tracker by choosing it from the **Commercial Rental Tracker Menu**. Click the **New** button and choose a Tenant. If this is the first record for that tenant in Rental Income Tracker, you will be asked if this is a **New Tenant** (if so, the deposit will be added to the charges and the rent amount may be prorated) or just the **First Payment** for the tenant. The **Starting Date**, **Ending**

Date and **Late Date** as well as the current months charges will all be automatically filled in for you. You can add any deposits, balances due or other charges to the **Charges** field by typing directly into the field or by clicking **Add Charge** and creating or choosing a charge.

2) Next click the **Choose** button above the **Payment Date** field and enter the date of the payment.

If the tenant made a partial payment on that date, enter the amount of the payment in the **Payment** field and click **Create Receipt**, then choose the date of the second payment and enter the amount of the second payment and click **Create Receipt**. *All partial payments, for the same rental period, for any one tenant, should appear on one Rental Income Tracker record.*

If the tenant paid in full, you just need to click the **Create Receipt** button which transfers the payment to the **Payments** field in Tenant tracker. It is important to remember to click the **Create Receipt** button after adding any payment to Rental Income Tracker so that it is posted to the Tenant's **Payments** field. Expenses paid are added to the **Expense paid by this tenant** field in the Expenses section of Commercial Tenant Tracker at this time.

All payments are added to the **Payments** field in Rental Income Tracker for your reference.

3) Use the **Create Statement** button to generate a duplicate receipt or an invoice to print or email to a tenant.

4) Click the **New** button and enter the next months payment(s) for the same tenant, or you can choose another tenant.

Tips on using the other components of Commercial Rental Tracker Plus:

- Navigation & Common buttons
- Reports
- **Rental Expense Tracker**
- **Other Income Tracker**
- **Asset Tracker**
- **Work Order Tracker**
- **Contact Tracker**
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Navigation & Common buttons

Use the **Commercial Rental Tracker Menu** button on the Welcome screen, and in the lower left corner of all the main windows, to access all the components of the software.

Each component of Commercial Rental Tracker Plus has a **New** button (for creating new records), a **Delete** button (for deleting one or more records), a **Find** button (for searching for text on another record), a **Sort** button (for sorting the records by predetermined fields), an **Import** button (for importing sample or archived records) and an **Export** button (for backing up your data).

You will find a **Help** button on most of the windows in Commercial Rental Tracker Plus. Included in the Help system is a **Tutorial**, which will introduce you to the most important features *of that component*. Just click the Tutorial button near the top of the Help window. More detailed explanations can be found by clicking the other buttons found near the top of the Help window.

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

records are normally saved when going to another record or closing the component, it is often a good idea to click the **Save** button after making changes, just to be safe.

Reports

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

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

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

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

Tips on using Rental Expense Tracker

You can keep track of all your expenses and easily generate **Tax Form Reports**

in Rental Expense Tracker. This component comes with a built is list of expense types which you can add to if necessary.

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

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

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

2) Select a building or a unit to apply the expense to by clicking **Select Bldg or Select Unit.**

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

Account Register

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

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

whether to display **Descriptions** or not. You can also add **Daily Separators**.

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

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

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

Expense Reports

Click **Expense Report** to generate a regular expense report, a Tax Form Report, a 1099-MISC form, or a Property Management Invoice. With **Expense Report** selected, you have many choices and can select one or more **Expense** types, **Payees** and **Accounts.**

With **Tax Form Report** selected you have fewer options, but you need to **Select an Owner**, and can choose a range of **Dates** by using the menu or the **Start Date** and **End Date** fields.

With **PM Invoice** selected, you need to **Select an Owner** and a range of **Dates**, specify a **Management Fee**, and choose **More Options.** Click **Help** for more information. Only records in Rental Expense Tracker and Other Income Tracker with the **Add to PM Invoice** option enabled will be included in the PM Invoice when the **Include Marked Expenses** or **Include Marked Income** options are enabled. You will probably always want to **Include Income Info.** You do NOT need to **Select Bldg(s) or Select Unit(s)** unless you ONLY want to include SOME of the units owned by the owner, instead of all of them.

Tips on using Other Income Tracker

Other Income Tracker is used to keep track of deposits to accounts and income that is not included on a Rental Income Tracker record such as laundry or vending machine income. Rental Income can be automatically imported by using the **Auto Import Income** button.

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

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

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

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

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

4) Select a building or a unit to apply the income to by clicking **Select Bldg or Select Unit.**

There are two miscellaneous fields you can use for any purpose. One is in the

upper right hand corner and the other is below the **Source** field. Click the **Change** button above either of these fields to modify the label for the field on all the records.

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

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

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

Tips on using Asset Tracker

Asset Tracker is used to keep track of all the appliances, furniture, etc. that are rented with the unit.

1) Click **New** to begin. You will be asked if you want to create a record for a similar asset, or if you want to start with a blank record. If you choose **Similar Asset**, the Asset Description, Make, Model, etc. and Purchase Price fields will be copied to the new record. You will then be asked to enter the Serial Number. On a new **Blank** record you will first be asked to enter an Asset Description.

2) Fill in the Make, Model, etc. field with a more detailed description of the asset, and then record the Serial Number, if there is one. You can also keep track of the date Purchased, the Purchase Price, and eventually the Date Sold and the Sale Price.

3) Select the building or unit the asset belongs to by clicking **Select Bldg** or **Select Unit**.

4) Enter any Notes about the Condition and Repairs about the asset.

You can create an **Asset Report** that lists all your assets which you can **Print** or **Save as...** to export to another program.

A list of assets for each unit is maintained in Commercial Unit Tracker's Asset section.

Tips on using Work Order Tracker

Work Order Tracker is used to keep track of repair or maintenance work orders.

1) To begin, click **New** and enter a brief Work Order Description. You can use the **Find WO** button above this field to locate other work orders in the database.

2) The Issue Date is entered automatically. Click **Add/Select Issuer** to create a new issuer (usually your name) or to pick one from the list.

3) Select a **Priority** for the work order. The Work Order # is automatically assigned, but can be changed if you wish. Select a **Job Type** (the choices are **Cleaning, Electrical, Install, Painting, Plumbing,** and **Repair**). You can add other Job Types by choosing **Add Type**. To remove a Job Type from the list, select it and then select **Delete Type**.

4) Click **Add/Select Vendor** to add or select a person or company to do the work. After determining who is available, you can agree on and enter a Start Date, Start Time, and either the number of hours the job is likely to take, or an End Time.

5) Select a Unit or Building by clicking **Select Bldg** or **Select Unit**.

6) Add any **Notes to Vendor** about the job and then click **Create Work Order** at the bottom of the screen. Click **View Work Order** to see previously created work orders. You can **Print** or **Save As...** work orders for future reference.

You can View Work Orders along with other Schedule Tracker records

in the **Monthly, Weekly** or **Daily** calendars.

7) When the job is complete, enter a Completion Date, any Notes Regarding Repairs, the Labor Total, Materials Total, Taxes and Total Amount paid. You can also record the Vendor's Invoice #. Click **Add to Expense Tracker** to create a Rental Expense Tracker record for the Total Amount.

Create a **Work Order Report** that lists all your Work Orders for any range of dates, and for any or all Units. There are a variety of **Options** and ways to sort the report. Click **Help** for more info.

Tips on using Contact Tracker

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

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

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

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

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

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

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

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

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

code, you can enter the first few letters of the name into the field near the center of the window.

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

request.

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

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

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

Tips on using Schedule Tracker

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

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

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

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

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

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

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

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

> In the Weekly View and Daily View window there is a **Table Options** button that allows you to specify the **Start and End Times** for the table as well as the time increments (:05, :10 or :15 minutes).
>
> In the Daily View window you can also choose what to display in the three columns. The choices are **Single Booking** (conflicting appointments will be shown in red and the Location and Purpose of the appointment will be displayed), **Single Booking & Tasks** (the Purpose column is replaced by your current Task List from Task Tracker), **Double Booking & Tasks** (conflicting appointments are shown in the second column instead of the Location) and **Triple Booking** (appointments that conflict with the first column are shown in

the second and appointments conflicting with those in the second column are shown in the third).

In the Monthly View window there are two small arrows at the top left corner which toggle a **Month** menu with a **Start Date** field. Click the **Choose** button to select a date in the week you want to be the first week of the monthly calendar.

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

Tips on using Task or Goal Tracker

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

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

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

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

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

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

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

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

Tips on using the Universal Calculator

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

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

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

Preferences

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

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

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

disable this option.

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

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

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

Backing Up and Recovering Missing Data

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

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

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

By backing up your records frequently, and copying the backup file to another disk, you can be sure your data can be easily restored to a new copy of the software, in case something goes wrong with your computer.