S T O C K S H E E T

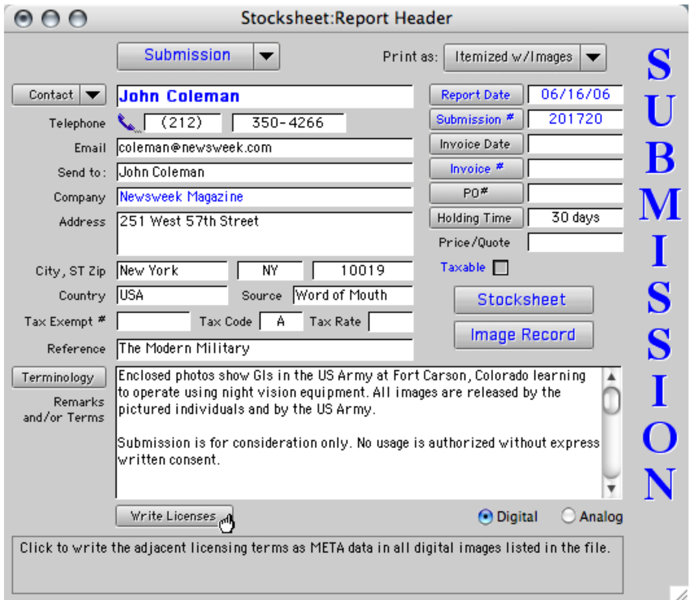
No data is stored in Stocksheet. Its sole purpose is to compile reports. These may be Licensing Invoices, Delivery Memos for stock submissions, job deliveries or portfolios.

Stocksheet can assemble digital submissions or generate reminders for license expirations.

Stocksheet is capable of writing metadata licenses into JPEG, TIFF, PSD and DNG images.

Reports are posted to the Submissions file for future reference with the exception of Licensing Invoices which are posted to the InView Receivables file if it's a part of your software package. Stocksheet has direct access to the client information in the Contacts file. *Note* ➧

Note: For simplicity, we refer to Job Deliveries simply as Deliveries, Portfolio Submissions as Portfolios and Stock Submissions as Submissions. In general discussions all of these reports are simply referred to as Submissions, except where more specifics are warranted.



An Overview & Shortcut Sequence

Every time you license images, deliver a job, submit stock images or your portfolio you create the appropriate report in Stocksheet; the start of a virtual paper trail. The process can begin in Contacts, Catalogue or Stocksheet itself.

There's no right or wrong way to start a new Stocksheet report. It's like driving across town; there are many successful routes. What is most comfortable and where you're coming from is your "right." You can enter Contact data first, then the image data or you can enter the images then the Contact data.

From Catalogue images are entered into Stocksheet via Catalogue's Submit menu. You can select a set of images and then Submit them to Stocksheet. More images can be selected and added from one or more Catalogues. Alternately you can start in the Contacts file by selecting the Contact then choosing any of the Stocksheet options in the Transactions popup menu of the Contacts Data Record. Or you can simply start entering data right into the Stocksheet Report Header window.

We've simplified one of the several possible ways to create a Submission or Invoice with a key sequence. This works like a charm if you have both InView and StockView in the same folder. These are the six steps:

Cmd/Ctrl-1

From either Contacts or Stocksheet, this activates a search for the record of the contact you are sending this report to.

If there's a contact already entered in the Stocksheet Report Header, Cmd/Ctrl-1 opens Contacts and finds the contact's record. Type Cmd/Ctrl-1 again to initiate a contact search while in Contacts.

Cmd/Ctrl-J

In the Contacts file, this opens the Stocksheet Report Header and installs the contact data you just looked up.

If a report with contact data is already in Stocksheet, you are asked if you want to replace that data. Provided you posted that report, meaning that you've put it away, go ahead and click OK to clear everything out and reset the Stocksheet. The new contact's information is entered in the Report Header.

> *Tip:*
> If a previous report still exists in Stocksheet, reset Stocksheet by choosing Reset Stocksheet from the Functions menu. Now type in the Contact's name.

Cmd/Ctrl-2

These first two steps can be bypassed by typing Cmd/Ctrl-2 in Stocksheet. The Report Header opens ready for you to type in the Contact's name. If the Contacts file is in your folder, Clairvoyance activates when the name is recognized and the address is filled in for you. ◀ *Tip*

Cmd/Ctrl-3

Opens the Stocksheet window where you enter quantities, descriptions and adjust pricing or other data for this report. Did you notice the 3 key has the number sign, #? That's a reminder that Cmd/Ctrl-3 gets you to the right place for entering numbers.

Note: If you haven't already transferred image records from your Catalogues this is the time to locate the images and use Add to a Submission in the Catalogue's Transfer menu. Images you select are then installed in Stocksheet without disrupting the information you've just entered into the Report Header.

Cmd/Ctrl-4

Calculates and formats the Stocksheet report after you've adjusted it. Yep. You guessed it. The mnemonic device here is the dollar sign on the 4 key, $, because besides counting images and formatting the data, it calculates monetary factors if the report is an Invoice.

> Tip:
> Using a PDF writer instead of your printer, you can create PDF files instead of printed reports.
>
> PDF files are ideal for inclusion in email or on CDs.

Cmd/Ctrl-5

Initiates the printing process. Notice the, %, looks like paper going through a printing press. ◀ *Tip*

Cmd/Ctrl-6

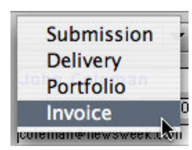
Posts your report in it's proper cubby hole inside your computer. All reports, except Invoices, go to the Submissions file. Invoices go to Receivables if it's installed. The six key has an upward pointing arrow to remind you to put your work away when you've finished. If you're Pennsylvania Dutch, put up your work ^. All the information you enter in a Submission, the Report Header and the Stocksheet data, are posted this way so that you can resurrect the Submission, intact, and change it to an Invoice with minimal fiddling around.

Report Header

Stocksheet opens to the Report Header window which closely resembles the Report Header in the Worksheet of InView - on purpose. They work similarly, too. The Report Header holds the specifics about a report: the type of report it is, the who, where, what and when about it.

If a report is already in Stocksheet when you open it, the Report Header displays the Header information for that report. If there is no report in Stocksheet... because the last time you used it you reset it... the Status popup menu at the top left of the window defaults to Submission.

Status



The Status popup menu lets you choose the type of report to create, a Submission, Delivery, Portfolio or Invoice. Click on the Status menu and designate the type you want. Remember that we're often going to simplify the discussion by referring to Submissions, Deliveries and Portfolios as Submissions.

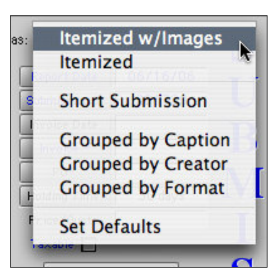
If you are using InView, too, and it's stored in the same folder with Stocksheet, every time you change the Status or enter a Contact name, Stocksheet checks into the Contacts file to confirm the contact's address information.

If the Contacts file is closed, StockView opens it, then settles it in the background to reference contacts records' addresses and phone numbers. You don't have to re-enter all that in Stocksheet's Report Header.

When the Status is set for Invoice, Stocksheet substitutes the billing address, if a different billing address is listed in the Contacts Billing & Shipping window.

Note: Job Deliveries can be initiated in InView's Worksheet by choosing Delivery Memo in Worksheet's Status popup menu. *(See the section on Status in the Worksheet chapter.)*

Print As:



To the right of the Status cell is a popup menu to select the type of printed format you want for your report. No matter what Status you've set for the report, your choices fall into two basic categories, Itemized or Grouped. Itemized reports print a line for every record in Stocksheet and can be printed with or without images. A Grouped report puts all entries of the same kind into groups with a count of the number in the group. The groups can be based on Caption, Creator or Format.

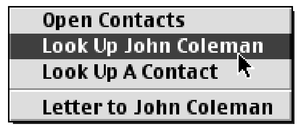
Reports with the Status set to Submission have the additional option of Short Submission. This is useful for shorter Submissions, say a half dozen or less images. It includes the Terms on the front.

Invoices have the additional choice of Itemized Quotes. This form prints individual licensing terms for each image listed in the Invoice.

You can set Stocksheet Preferences in Flow Chart so that the report you like best is already selected in this menu . You can change it for special situations. Changing the Print As setting in the Report Header is a temporary change of the default until you Quit the program. To reset the default, use Preferences in Flow Chart.

Only Invoices and Submissions can make use of the Grouped reports. No matter what setting you have for Print As, Deliveries and Portfolios default to Itemized for printing. *(See Preferences under the Windows menu and read the description of the printing templates under the Forms submenu for more information about the results of these settings.)*

Contact



Contact in the header is the person for whom this report is being prepared. Notice the Contact popup menu. You can chose to Open Contacts, Look Up the current contact, Look Up A Contact or write a Letter to the current contact. (The current contact is the one whose name is in the Report Header.) Open Contacts opens the Contacts file. Look Up the current Contact and Look Up A Contact may sound like the same thing, but... not quite. Look Up... John Smith, say... locates the record of the Contact entered in the Report Header, John Smith. Look Up A Contact opens the Contacts file in Search mode to locate a Contact, any Contact.

Note: If you don't have InView in the folder, the popup menu doesn't list these options.

If InView Contacts is not installed, you have to fill in the name, phone number, email and address information. Each field is labeled to identify what information to enter. With Zip Magic Data! in the folder, when you enter the Zip Code for US locations, City and State are filled in for you, but only if the City and State fields are empty.

Telephone

The Telephone icon holds a menu of dialing options. You must have a modem connected to your computer to use this feature. Choose either the word Dial… or the number immediately below it and StockView dials the number currently displayed. The number represents StockView's best guess at how the number should be dialed, based on your settings in the Flow Chart Dialing Preferences. You can override StockView's guess by choosing any of three alternatives listed below on the menu.

The last choice in the menu opens the Flow Chart to the Dialing Preferences window where you can establish or change Dialing Preferences.

At the right side of the Report Header window is a series of cells and buttons. These buttons automatically sequence and enter data into the adjacent cells.

Report Date

This field is the date of the report. What a concept! Type the date you want entered or click the Report Date button to automatically install today's date.

Note: If you type a date into this or other date cells in StockView, don't type the slashes. They are entered for you. If you omit the year, that is added, too. The year added is determined by the shortest route from today to the indicated date. If today is January 1, 2001, 09/27/ is assigned to 2000, but 06/21/ gets you 2001. When you enter, say 02/01 for February 1st, the date appears in the cell without leading zeroes, but months and days *must* be entered using two digits.

Submission

This number identifies each Submission by a distinct number. You can manually assign the number or automatically enter it by clicking on the Submission# button. Submission Numbers are not issued if the report's Status is an Invoice. The numbers are determined by the Numbering Preferences in Flow Chart. If you leave it to StockView, numbering starts at 1, but, you can assign the next number in the Numbering Preferences and it sequences automatically from there on. This is handy if you have a sudden flash of inspiration and decide to alter certain numbers at the start of a new year or new month. *Tip* ➧

Tip:
Although auto numbering can only issue numerals, you can enter alphabetic and other characters to the numbers once they're issued.

Tip:
To use this, enter the PO Number in Contacts using the formatting features found in the Special Numbers cell of the Billing & Shipping window. When you click on the PO# button here, StockView looks in Contacts for special formatting, a marker, indicating a PO#.

Tip:
Enter zero for Holding Time on Submissions and you'll get 'em for Holding Fees every time! Seriously though, if a Submission is intended to be long term, such as placement with a stock agency, a zero entered in the Holding Time tells StockView to treat it as an open ended return.

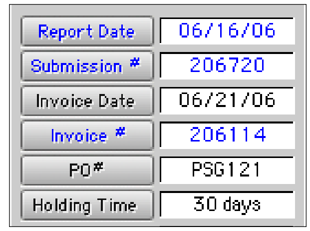
Warning!
Some reports make direct use of this blanket fee while others use individual line entries. If your fees vary on individual items in the report, enter the amounts on a line-by-line basis in either the Image Record or the Data Sheet.

Tip:
If more of your Invoices are to be taxed than not, you can set Taxable as a default setting on new reports in the Stocksheet Preferences window of Flow Chart.

Warning!
If you change the tax rate in this Report Header, but not in the Contacts file, the entry reverts to the information from the Contacts file every time you change the Status of this report.

Invoice Date

The date you issue an Invoice goes here. Today's date is installed if you click the Invoice Date button. If you open the empty cell, today's date is installed when you close it again... without typing anything in. You can manually enter any date you need. Dare we admit that occasionally we postpone invoicing until a couple of days after it should have been done? That's when manual date entry works really well.



Invoice

As with Submission #s, you can manually assign the number or automatically enter it by clicking on the Invoice# button.The numbers are determined by the Numbering Preferences in Flow Chart. If the Status is not set to Invoice, StockView protests that this isn't an Invoice and can't, therefore, look up a number. Don't you just love software with an attitude?

PO

Purchase Order numbers are typically supplied by your client and entered manually for each Invoice, but if you have InView in the folder and your client has issued you an open purchase order for an ongoing project, you can avoid the tedium of looking it up each time. To install open PO's listed in the Contact's record click on the PO# button. ➧ *Tip*

Holding Time/Terms

If the Status is set to anything but an Invoice, the next cell is labeled Holding Time. If the Status is set to Invoice, it reads Terms. Click the button and 14 Days is entered for Submissions, 30 Days for Invoices. But you can type in any number. Enter a zero and the Invoice prints C.O.D. terms in the printing template, as shipped.

A default value for Terms can be created by holding the Opt/Alt key and clicking on the Terms button. In the first dialog window that opens, enter the number of days that you want to automatically be installed on every new invoice. A second dialog then asks for the number of days that you want to automatically be installed on every new submission.

Note: InView's Receivables file uses the Terms number to determine when an Invoice is due for payment. StockView's Submissions file uses the Holding Time number to determine when a Submission is due for return. ➧ *Tip*

Price/Quote

Enter an all-inclusive quote for Submissions or a blanket price to Invoices here. Rather than quote a fee for each individual image, many Submissions and Invoices need a quote or price applying to every image submitted for a single usage. ➧ *Warning!*

Taxable

If Sales Tax is to be applied to any part of an Invoice, the Taxable check box should be checked. As we'll explain later, line entries that don't get taxed in a taxable Invoice need to be exempted individually. For reports other than an Invoice, this is a non-issue. ➧ *Tip*

If you use InView with StockView, the moment you enter a contact's name in Stocksheet, the Contacts file supplies all address and phone information, and the Tax Rate. ➧ *Warning!*

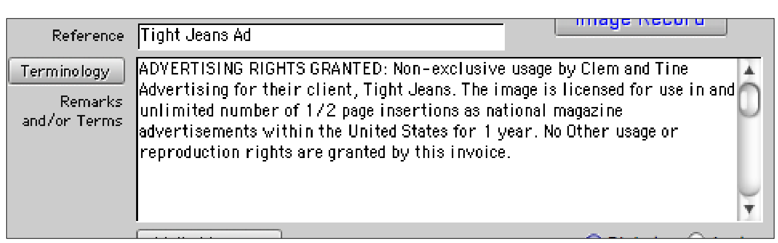
Reference

Enter a brief description of the project here. Most reports are pre-set to include this Reference in printouts. Reference also helps locate Submissions and Invoices you've posted.

Remarks and/or Terms

This is a multi-function text box. Enter whatever you like. Describe, say, proposed or actual rights of usage being transferred. How much of your Remarks appear on a report printout depends on the particular report. You can, as with all of the data in reports, customize the printed output: move, expand or eliminate the space allocated for Remarks. *(see the chapter: Printing & Editing Reports)*

When you click the Terminology button, the Terminology file opens. Terminology is a separate file where you create, revise and store terms of agreement. The



Terminology file can enter your terms in the Remarks cell of the Report Header. See the chapter on Terminology for information on its workings.

The cell for Terminology and Remarks, in the Report Header window can be enlarged vertically by clicking and dragging on the bottom right corner of the Report Header window.

Stocksheet Button

This button transfers you to Stocksheet's data sheet where all the contents of Stocksheet are accessible in the rows and columns format.

Image Record

The Image Record button opens the Image Record window which contains an organized view of one Stocksheet record at a time, plus any associated image. It can be used in addition to or instead of the Stocksheet window.

Note: There are actually two Image Record windows that this button accesses. Which one depends on the setting below for Digital or Analog.

Digital or Analog

A number of the program functions are influenced by your choice of Digital or Analog at the bottom of the Report Header window. If you're working with both in a single report, use Analog. Otherwise choose the format you're working with.

The Preferences, accessed by the Windows menu, allow you to choose the default setting.

Write Licenses

When preparing a digital licensing invoice, or any other digital report for that matter, when you click on this button, Stocksheet writes the Remarks or Terms into the metadata of each image. *Tip* ➧

If an image has its own, individual terms entered in its Image Record window, those terms are written instead of the Terms in the Report Header.

Some special Merge Words, such as «Serial#» from Terminology are automatically substituted for the appropriate words as the metadata is written.

When writing metadata, Stocksheet includes any default Contact Info you've entered in the META Defaults of Flow Chart, if and only if, there's not Contact or Copyright info already in the image.

All other metadata in the image(s) is left as-is.

See Licensing in the section on Image Record for more information on Stocksheet's metadata licensing capabilities.

Tip:

When using Build Digital Submission, in the Functions menu, Stocksheet offers to write licenses to the images as the folder is assembled.

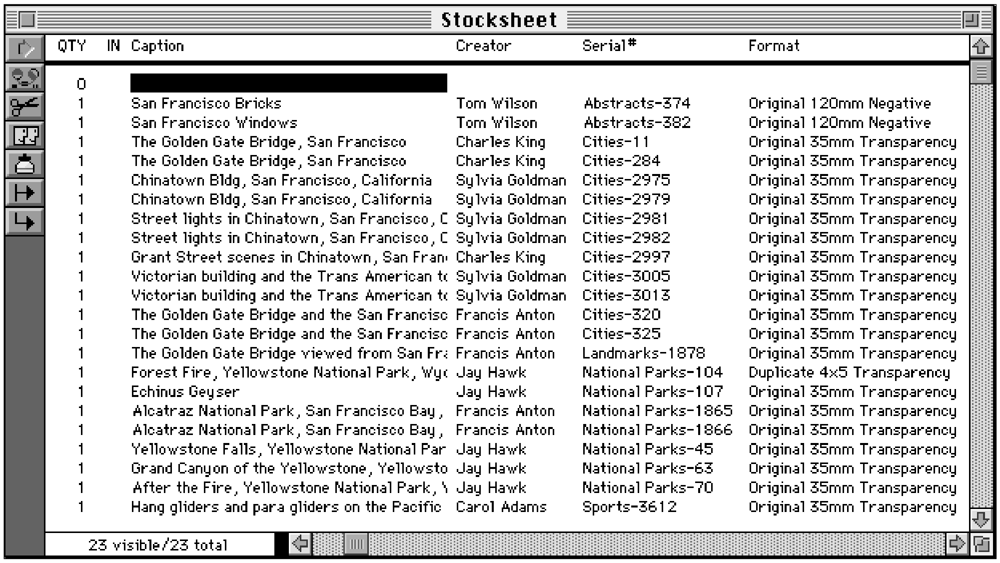
The advantage is that the copies being delivered are the ones getting the metadata versus the images in your collection from which the delivered copies will be derived.

Your "originals" remain as they were.

Stocksheet Window

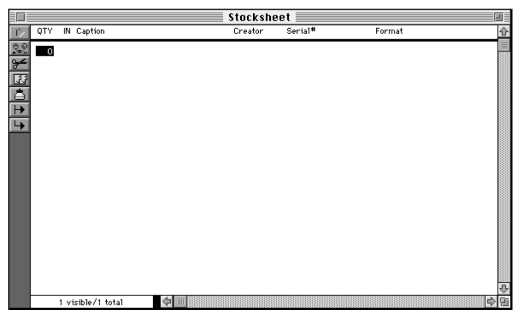
The core of Stocksheet is the data sheet, where all the data contained in the file is visible. The data sheet window is the one place where you can see all the fields of Stocksheet strung out in a single line. Since you can't possibly see all the fields in one window, even on the largest monitor, you can review all the fields in Stocksheet's data sheet window. Scroll or Tab through the fields from left to right. ◆ *Tip*

> *Tip:*
> There are a lot of ways to get to this data sheet called Stocksheet. If you're in the Report Header window, you can type Cmd/Ctrl-3, or Cmd/Ctrl-/ or click on the Stocksheet button or choose Stocksheet from the Functions or Windows menu.


Stocksheet

QTY	IN	Caption	Creator	Serial#	Format
0					
1		San Francisco Bricks	Tom Wilson	Abstracts-374	Original 120mm Negative
1		San Francisco Windows	Tom Wilson	Abstracts-382	Original 120mm Negative
1		The Golden Gate Bridge, San Francisco	Charles King	Cities-11	Original 35mm Transparency
1		The Golden Gate Bridge, San Francisco	Charles King	Cities-284	Original 35mm Transparency
1		Chinatown Bldg, San Francisco, California	Sylvia Goldman	Cities-2975	Original 35mm Transparency
1		Chinatown Bldg, San Francisco, California	Sylvia Goldman	Cities-2979	Original 35mm Transparency
1		Street lights in Chinatown, San Francisco, C	Sylvia Goldman	Cities-2981	Original 35mm Transparency
1		Street lights in Chinatown, San Francisco, C	Sylvia Goldman	Cities-2982	Original 35mm Transparency
1		Grant Street scenes in Chinatown, San Fran	Charles King	Cities-2997	Original 35mm Transparency
1		Victorian building and the Trans American to	Sylvia Goldman	Cities-3005	Original 35mm Transparency
1		Victorian building and the Trans American to	Sylvia Goldman	Cities-3013	Original 35mm Transparency
1		The Golden Gate Bridge and the San Francisc	Francis Anton	Cities-320	Original 35mm Transparency
1		The Golden Gate Bridge and the San Francisc	Francis Anton	Cities-325	Original 35mm Transparency
1		The Golden Gate Bridge viewed from San Fra	Francis Anton	Landmarks-1878	Original 35mm Transparency
1		Forest Fire, Yellowstone National Park, Wy	Jay Hawk	National Parks-104	Duplicate 4x5 Transparency
1		Echinus Geyser	Jay Hawk	National Parks-107	Original 35mm Transparency
1		Alcatraz National Park, San Francisco Bay,	Francis Anton	National Parks-1865	Original 35mm Transparency
1		Alcatraz National Park, San Francisco Bay,	Francis Anton	National Parks-1866	Original 35mm Transparency
1		Yellowstone Falls, Yellowstone National Par	Jay Hawk	National Parks-45	Original 35mm Transparency
1		Grand Canyon of the Yellowstone, Yellowsto	Jay Hawk	National Parks-63	Original 35mm Transparency
1		After the Fire, Yellowstone National Park, \	Jay Hawk	National Parks-70	Original 35mm Transparency
1		Hang gliders and para gliders on the Pacific	Carol Adams	Sports-3612	Original 35mm Transparency

23 visible/23 total



If you initiated a Submission from the Catalogue, a Catalogue clone or from Researcher, the images you are submitting are already listed in the Stocksheet.

If a lone zero sits at the top of Stocksheet and the rest of the window is EMPTY, you can manually enter Submission or Invoice details. Better than that, you can choose Add to a Submission from the Transfer menu of Catalogue to move images into Stocksheet.

QTY

Zeros entered in the QTY field are suppressed in printed reports. That means although they are present and influence the output, no zeros are printed.

The very first line in Stocksheet is a protected line and requires a QTY entry, usually of zero. Scrolling well to the right reveals the data entered in the Report Header window. Absence of a number in the QTY leaves the line vulnerable to deletion. In subsequent rows the QTY field shows the number of images the record represents whether analog or digital. ◆ *Warning!*

> *Warning!*
> There must always be a quantity entered on the first line of Stocksheet, even if it's a zero. Although you can't see it without scrolling well to the right, this first line contains everything that you entered in the Report Header. A QTY entry protects this important line from deletion when the calculations are run. Lines without a QTY entry are deleted.

IN

The IN field is one of the ways to log returns of analog images, particularly partial returns. Enter the number returned in the IN cell of each line and the QTY is automatically adjusted. At the same time, a Return Date is entered. Usually though, returns are entered in the Submissions file.

Caption

The Caption field carries over, intact, from the source Catalogue. So does Creator and Serial#. This is the place to enter descriptive words you want to include in the printed report when you bill for Research Fees or Holding Fees or when you have entries for items other than images.

Creator

The Creator name is filled in automatically from the source Catalogue.

Serial

The two part serial number you enter in Catalogues is merged into a single field in this window.

Format

The Format field in Stocksheet is a combination of the Generation, Format and Medium fields in

Catalogue. The fields are combined as image data is transferred into Stocksheet.

Value

for analog images, Value indicates the monetary value of each image in case of loss or damage. Values entered in Catalogue transfer to Stocksheet. If you entered no value there, Stocksheet shows a zero in this cell. Hopefully, that represents an oversight, not the true worth of your work.

Location

This is the File Location field transferred from the source Catalogue.

If you're not quoting or billing individually for each line entry in a particular Stocksheet report, you can skip the rest of the fields. Hit the Return key to add more entries or, if the report has all it's entries, Cmd/Ctrl-4 to calculate and Cmd/Ctrl-5 to print it.

Price

StockView does not automatically enter data in this field. You make any entries here. For line-by-line pricing, Price is where you enter the usage fee you quoted in a Submission or the usage fee you finally settled upon for an Invoice.

Note: This Price is not influenced or multiplied by the number entered into the QTY field.

When you are paid a deposit or a Research Fee that is applied against usage fees, enter it here. Credits or discounts applied to an Invoice are entered as *negative* numbers in the Price field. Credits applied to an invoice need account codes.

Code

This field holds the Account Code for Invoices. *Warning!* ➧

For Submissions, no Code is necessary, but, if you use InView's Receivables, Invoices without the proper Account Code are not posted. *(see Install Account Codes under the Functions menu later in this chapter and the chapter on the Chart of Accounts.) Tip* ➧

Taxable

Use this for indicating that sales tax is to be added. Yes indicates taxable, No means not taxable. If, in the Report Header, Taxable is checked and a Tax Rate is entered, Sales Tax is added to every Price that doesn't have No in the Taxable field.

TaxRate

The sales tax rate is displayed here in decimal form. You don't have to enter it, though. The TaxRate entered in the Report Header is transferred here when the report is calculated. When Stocksheet calculates a report it uses this rate.

If InView is installed in the folder, the Tax Rate from InView's Contacts file is automatically transferred here, along with the rest of the contact's data.

Tax and Total

These numbers are calculated by StockView and reflect the resulting Tax and then Price plus Tax.

Credits

This refers to money, not your name in lights. The Credits field is used for any payments or deposits that apply. StockView makes the entries in this field when performing its calculations. Any entries that you make here are overridden. Kaput!

Each line in the Total field represents the individual total for that record. The bottom line displays the overall Total after the report is calculated.

Chances are you won't very often go to or beyond this point in the Stocksheet window. There's really no need to. If you can't resist peeking, though, you'll see a field titled Status. There should be no entries in the Status field other than in the top line. Status is filled with information carried over from the Report Header. *Warning!* ➧

Warning!

A negative dollar amount entered with an account code reduces the Total of the invoice and any related sales tax. It's treated as a discount or credit that reduces the original total of the invoice. Negative amounts without codes are treated as payments received and reduce the balance due, but do not alter the original invoice total.

Tip:

Agencies or others billing for more than one creator's work can assign each creator an individual Account Code in the Chart of Accounts. Receivables can then report on gross sales by creator.

Warning!

If you activate the Report Header with a click on a visible part of that window, bringing it to the front of other windows, it often appears to be empty! You're sure you've lost all the data that was there. Fear not. Type Cmd/Ctrl-2 or click on any of the buttons in the Report Header window or select Report Header from the Functions or Windows menu and your data reappears.

Image Record

There are actually two windows we're going to describe here. Which one you end up dealing with is determined by the Digital and Analog setting in the Report Header window.

This section will start by covering the basics and the common elements in the two, then cover the features and settings that are unique to each of them.

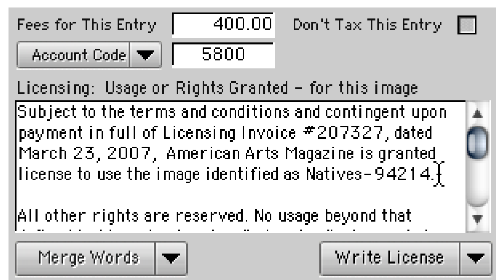
In either mode, the window is very different from its counterpart in Catalogue even while much of its information comes from Catalogue. This particular Image Record window shows one line at a time of Stocksheet with detailed information about the image(s) and the dates involved in its usage and/or submission.

Note: It is not necessary that images in a Submission ever have to be entered into a Catalogue. Images can be entered directly into Stocksheet. The information, however, does not transfer back upstream. New images being permanently added to your image library should be entered into Catalogue then processed in Stocksheet. ➧ *Tip*

Tip:
The Caption window in Catalogue serves well for quickly entering the more pertinent bits of data needed for un-catalogued images about to be submitted, then transfer them to Stocksheet. In this way your Catalogue is built as you go. Additional information can be added to the Catalogue record later.

Itemized Fees and licensing

The lower portion of the window has a set of cells for itemized, line by line entry of licensing terms and fees associated with the image(s) in the record.



Fees

If a blanket fee is not being applied via the Report Header window, individual usage fees are entered in the Fees cell.

Tax

A check box exempts the active line from any sales tax you apply to the rest of the Invoice. The exemption only affects entries that are checked in this manner. If no sales tax is applied to the overall Invoice, ignore the check box. In that case it is irrelevant.

Account Code

For posting to InView's Receivables, Account Codes must be entered into the Account Code cell of every record that contains a fee. The Account Codes popup menu lists the Fee accounts from your Chart of Accounts and enters your selection in the Account Code cell.

If you attempt to post an Invoice without assigning account codes with each of the fees, Stocksheet attempts to install the codes for you. First it looks for the creators' names in Chart of Accounts and uses any codes assigned to them. Failing that, it looks for an account named Usage Fees. If it's unable to find suitable codes in the Chart of Accounts, it refuses to post the Invoice to the Receivables file. ➧ *Tip*

Tip:
You can individually track licensing fees for multiple creators by entering an account code for each person in the Chart of Accounts. Use each person's account code for any licenses or fees charged on their behalf and Receivables can readily report on billed and paid fees for each Creator.

Licensing

If you have all your Terms and Licensing definitions in the Report Header, you're all set - maybe.

If you want detailed licensing terms on a per image basis, use this feature - especially if you want to write those terms as metadata into the digital images involved.

Note: Although all Invoice forms accommodate line-by-line entry of usage fees, only the Invoice w/Images and the Itemized Quotes Invoice is pre-set to print line-by-line usage descriptions using these licensing terms.

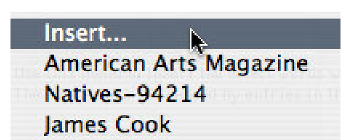
The cell holds whatever terms you've assembled for the image. These terms can be from the Terminology file, using the Enter Terms In... popup menu and choosing Image License. See the Terminology chapter for details.

Within the Digital Record, you can use the two popup menus to modify or create wording, then write it as metadata.

Merge Words

This popup menu contains a short list of selections. When you choose one, it is inserted at the cursor's location within the text of the Licensing cell above.

The menu lists, the client company listed in the Report Header, the name or serial number of the image and the name of the listed Creator.

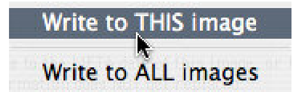


If any of those items is non entered, it's not included in the menu.

Write License

The Write License popup menu offers two choices: Write to THIS image and Write to ALL images.

Write to THIS image does exactly as it says. The wording of the license is written as metadata into the corresponding digital image.



Write to ALL images takes a slightly different approach. If the image name or serial number is included, it recognizes the fact and adjusts appropriately for each image as the metadata is written. *Note* ➧

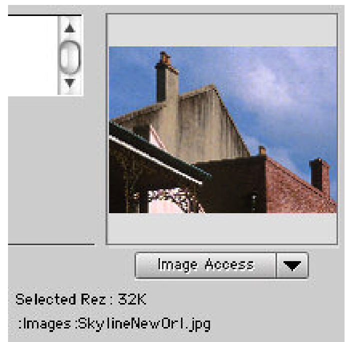
> *Note:*
> If no Contact Info is in the existing metadata of the image, your default Contact Info is added. Otherwise the existing contact info in the image is left as-is.
>
> Otherwise, ONLY the licensing information is written to the images.
>
> All other existing metadata is left untouched.

Image Access

The right side of the window has an area that displays any image associated with the record. Below the image area is the Image Access popup menu and an area that displays information about the image.

Image Display

The area designated for images can be used for quick addition of digital images. Drag one or many images onto this area to have them added to Stocksheet. Any applicable metadata in them is read and used to populate the cells in the window.

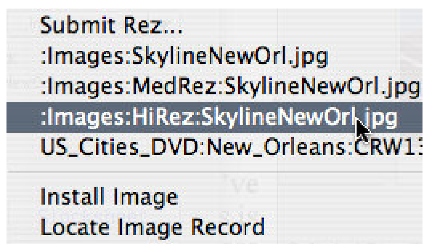


The Image Access popup menu provides access to the digital features.

Submit Rez...

Submit Rez... is followed by a list of the resolutions listed in Catalogue for the image. If an image has been added directly into Stocksheet, bypassing Catalogue, there are no additional resolutions listed.

The only time the selected resolution matters is in preparing a digital submission or delivery. When you choose Build Digital Submission from the Functions menu, Stocksheet uses your selections here for its list of images to copy into the folder being prepared for the Submission. The selected resolution is what it uses. *Tip* ➧



> Tip:
> Submit Rez... like Set Resolution, in the Functions menu, applies to all the images in Stocksheet.
>
> Use either to apply to the whole. Then select specific listings in this menu to adjust any individual images that are to be exceptions.

No matter what you select, the displayed image remains as it was, showing the first image on the list - presumably the thumbnail. The size and location of the selected resolution are displayed in the area below the Image Access popup menu.

If your choice is not found the size of the rez is shown as 0K (zero). If you've set the overall resolution of the Submission to a level beyond those listed, a note to that effect appears in red.

Install Image

As it does in Catalogue, Install Image opens a dialog window in which you can locate an image to attach to this entry. Any image already displayed is replaced with your choice. Multiple resolutions of the selected image do not get listed by this process.

Locate Image Record

Use this choice to open the appropriate Catalogue and locate the record for the listed image. The serial number listed here must be correct and unique for this feature to work.

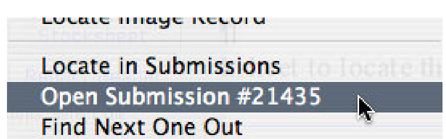
If the image was added without the use of Catalogue, this choice does not appear in the menu.

Locate in Submissions

This selection triggers a search through the Submissions file to turn up all submissions that have included this image, based on the Serial Number.

Open Submission

Following the use of Check Whereabouts, in the Functions menu, images that are logged out have a red colored note appear in the window. Open Submission appears in the Image Access popup menu of any such marked entries. Analog images may have difficulty being in two places at once, but it can also be a problem for a digital image to have conflicting considerations or licenses.

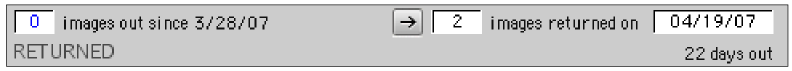


Find Next One Out

This scans the list of images in Stocksheet to locate the next image that has been determined to be in a current Submission.

Image Record (Analog)

As noted at the outset of this section, there are some differences in the Image Record you see for analog or digital reports. Here we'll cover the few additional items found in the analog version of the window.



At the top of the analog Image Record window is the QTY cell. QTY shows the number of images included in this single line of the Submission. When the report has been calculated, the Submission Date appears to the right of the QTY cell. If a Holding Time was entered in the Report Header, the due date appears immediately below.

To the right of the QTY cell is the IN cell. Any number entered into the IN cell is automatically subtracted from the QTY and then the current date is installed as the Return Date. The IN button marks the full number shown in the QTY as returned. The Return Date can be manually adjusted if necessary.

If, in QTY, the number logged IN is less than the number logged out, Stocksheet creates a new line and distributes the IN and out QTY. Stocksheet rebukes you should you try to return more than the QTY out.

When all of the images on a single record are returned, Stocksheet displays the word RETURNED below the QTY.

The next portion of the Image Record has the now familiar fields: Caption, Creator, Format, Serial Number, Value and File Location as brought in from the Catalogue. In the Image Record you can modify or shorten the File Location if necessary.

Value

Value indicates the monetary value of each image in case of loss or damage. Values entered in Catalogue transfer to Stocksheet. If you entered no value there, Stocksheet shows a zero in this cell. Hopefully, that represents an oversight, not the true worth of your work.

File Location

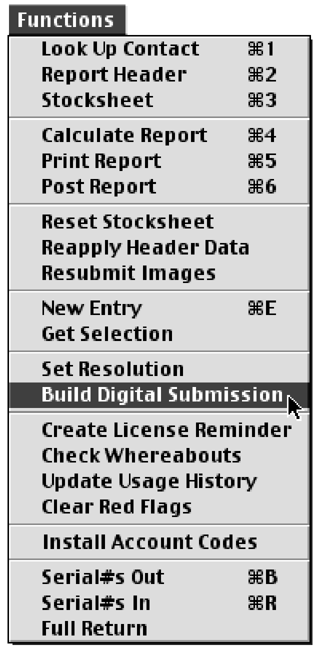
The File Location button locates the image in its Catalogue. It takes note of the Serial Number, opens the indicated catalogue file and searches for that Serial Number in the file.

Menus

Functions

The first six items in this menu show Cmd/Ctrl key equivalents numbered 1, 2, 3, 4, 5 and 6 *(see the beginning of this chapter.)* These are the six typical steps, in order, for creating either a Submission or an Invoice.

Look Up Contact



This opens your Contacts file and locates the contact whose name is entered in the Report Header. If no name is entered, it opens the search dialog box, ready for you to enter the name of a contact. If InView is not in the folder with StockView, this menu item does nothing... except create InView envy.

Report Header

This opens the Stocksheet Report Header and goes to the first line of Stocksheet. If the Status cell is empty, Status defaults to Submission. You don't have to do a thing.

If StockView finds that no contact's name is entered in the Report Header, it automatically opens the InView Contacts file and drops it in the background for linking. Linking gives Stocksheet automatic access to the information in that file.

Stocksheet

Stocksheet is the heartbeat window of StockView. It is the data sheet which is titled Stocksheet. When this window is first opened the cursor is in the QTY field of the first line.

Calculate Report

Count the images, calculate any monetary entries and format the report using this menu choice or its key command equivalent, Cmd/Ctrl-4. It takes a moment to inspect and calculate the report. No bells or whistles, just some bouncing around and rearranging of the overall format of the report.

Print Report

When you choose this, StockView checks the Status and your selection for Print As, opens the appropriate report for you and prints it. Before printing, StockView checks the report date. If the date is not current, due, perhaps, to converting a Submission to an Invoice, StockView offers to enter today's date for you. You may accept or decline the offer. If the report has not been calculated StockView calculates the report before starting the print sequence. *Tip* ➧

You can have an advance look at the printout by clicking Cancel in the Print dialog and then selecting Preview from the File menu. When you're ready to proceed, select Print again from the File menu. Of course, if things don't look right in the preview, you can adjust the printing template or return to the other Stocksheet windows to add entries or revise what's already there.

> Tip:
> Using a PDF writer instead of your printer, you can create PDF files instead of printed reports.
>
> PDF files are ideal for inclusion in email or on CDs.

Post Report

OK, this is it. The report is finished now. But there's always the chance that you may want to revise or review it. You certainly need to keep it on file. Posting is the way to store it. Post Report stores Submissions of any sort in the Submissions file and Invoices in the InView Receivables file. StockView decides where the report belongs using the Status set in the Report Header. *Warning!* ➧

> ***Warning!***
> Invoices without account codes cannot be posted. If you try to post an Invoice with missing Account Codes, we're going to try to install them for you using the Install Account Codes function. If any items with fees lack an Account Code, you'll have to assign codes before you can post it.

Note: You can post a report without printing it, then resurrect it, revise or print it when it suits you.

After a report is posted, a dialog box offers to make a notation in the contact's record for you. If InView is in the folder, a Submission or Invoice notation is added to the Transactions field for the contact. If the contact shown in the Report Header has no record in the file, StockView offers to use the information from the report to start one. You do want that contact's information, don't you?

Reset Stocksheet

When you finish with a report and have it posted, you don't have to, but you may want to start afresh. Reset Stocksheet asks your permission, then clears all data from Stocksheet wiping the slate clean and ready for new work. That's why you want to be sure that Submissions or Invoices are posted before resetting.

Re-Apply Header Data

Re-Apply Header Data allows you to re-use the Contact and other information entered in the Report Header window. It could just as easily have been called New Submission - Same Contact. This speeds the process of making a new submission to the same contact or to invoice the contact using the submission data.

After acquiring your approval, the individual line entries in the Stocksheet are deleted and the file is ready to start the new report.

Resubmit Images

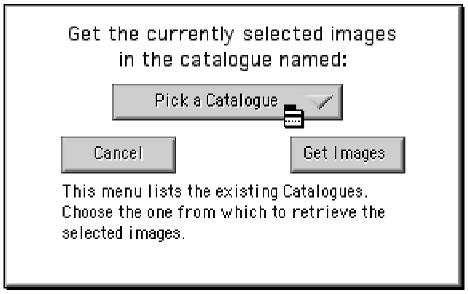
To send the same submission out to another contact without rebuilding it, get the Submission in Stocksheet then choose Resubmit Images. All information in the Report Header is cleared and the Submission is readied for you to enter the specifics of who it's going to and under what terms.

New Entry

For manual entries of additional items in Stocksheet, New Entry adds a line and opens the Image Record window.

Get Selection

With the desired set of images already selected in a Catalogue, Get Selection opens a window in which you can choose the Catalogue that the images are coming from, then instruct it to retrieve them.



Click on the popup menu for a list of your Catalogues and choose the one with the selected images. When you click on Get Images, the selected images in the Catalogue are added to whatever is already in Stocksheet. Nothing in Stocksheet is replaced.

The end result is precisely the same as choosing Add Selected To a Submission from the Submit menu within the Catalogue. ➧ *Note*

Note:
Get Selection adds backwards compatibility for Stocksheet with all 4.0 and 4.1.0 versions of Catalogue by retrieving the information needed for generating digital submissions.

Catalogue 4.1.1 and later versions automatically include the necessary information when images are submitted using Add Selected To a Submission from the Submit menu within the Catalogue.

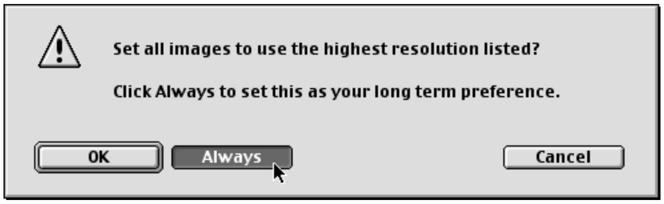
Set Resolution

Digital Submissions can be built by Stocksheet using whichever resolution you prefer from those listed with each image. Resolutions can be selected on a record by record basis in the Image Record window via Submit Rez... in the Image Access popup menu. Or a single resolution can be set for all images in the Submission using Set Resolution. You can also set a default preference for the resolution to be used.

Resolutions are the various locations listed in Catalogue under Image Location(s).

When you choose Set Resolution, a dialog opens for you to enter a number representing which image in the list of resolutions should be used. 1 uses the first image listed, 5 uses the fifth in the list. An entry of 10 uses the highest, or last, resolution listed whether there are 1, 2, 4 or 50 images in the list of resolutions.

When you click OK, a second dialog opens to confirm your choice. Click OK to have your choice applied to all the images currently listed in Stocksheet.



Click Always to make your choice apply to all future submissions as well. The number can be changed to another at any time. In fact, after applying this setting, individual images can still be set to another resolution using the Image Access popup menu in the Image Record window.

Tip:
When using Build Digital Submission, Stocksheet offers to write licenses to the images as the folder is assembled.

The advantage is that the copies being delivered are the ones getting the metadata versus the images in your collection from which the delivered copies will be derived.

Your "originals" remain as they were.

Build Digital Submission

Using the indicated resolutions, a folder is filled with digital image files for transfer to the contact. The folder of images can be burned to a CD or DVD, emailed to a contact or loaded to your web site for the client to download. ➧ *Tip* ➧ *Tip*

Tip:
Use Stocksheet to generate a PDF copy of the delivery memo. Drop the PDF into the folder along with the images so that it can accompany them electronically.

The process starts with a dialog window to name the folder and choose the location to which it is to be saved. Then the images listed in Stocksheet are copied into the folder. No conversions of file size or file type are made. The resulting images are exact copies of the original digital files just as you would get by copying them from one folder to another on your computer's desktop.

If an image is not found, it cannot be copied. To aid you in recognizing such errors and omissions, the entry is changed to red text in Stocksheet.

Create License Reminder

License Reminders are special entries in the Submissions file that alert you when it's time for a licensed usage to expire. This provides you with the opportunity to take timely steps towards relicensing the usage.

Reminders can be created within the Submissions file, or they can be created from Stocksheet using this function. A reminder created in Stocksheet is built from the report currently in Stocksheet whether it is an invoice or a submission. Certain information is borrowed from the report in Stocksheet, then loaded into Submissions in a window in which you can any other touches or notes necessary.

See License Reminders in the section on Submissions.

Check Whereabouts

Keeping track of everything is the very reason most of us bought a computer in the first place. Are you very busy –lots of images to manage –can't always remember what's out and what's available? Before completing a new Submission you may want to check that any analog images you're submitting are available. Just as it does in Catalogue, Check Whereabouts looks at the posted Submissions and compares serial numbers to see which, if any, of the images in the Submission you are compiling for a new Submission are currently logged out somewhere else. Maybe you forgot to log in the Return of an image or have duplicate serial numbers or an image really is out. Here's your last chance to make sure before finalizing a Submission.

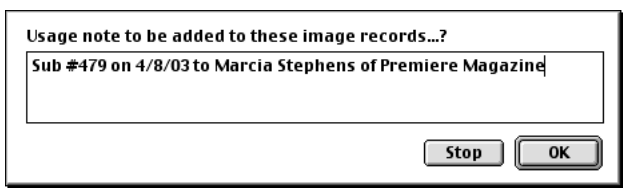
Some people don't use unique serial numbers. Some don't use serial numbers at all! If you're one of those, Check Whereabouts won't do a thing for you because it looks only at serial numbers to determine what's where. *Warning!* ➧

> ***Warning!***
> Check Whereabouts works only if your serial numbers are unique and if each record of the Submission represents a single image.

When you try to log out something that Check Whereabouts determines is already out, you get a notation in the Submission you're checking. When the whole Submission has been scanned, a dialog box appears identifying the quantity of images that appear to be out, the main Stocksheet opens with conflicted entries in red and the Image Record window opens in the forefront showing the first noted conflict.

See the section on the Image Record for details on following up on this process.

Update Usage History



This procedure starts by offering you a chance to modify the information that Stocksheet has prepared for addition to the Previous Usage in the image records in Catalogue. The image records are then located, possibly within a number of different Catalogues, and the notation is added to each one. If the image has a fee listed in Stocksheet the amount is added to the images' earnings.

As records are noted, if it's detected that some images have a Linked History, you're asked if the linked images should be noted also. With your approval, the Previous Usage of these images is included in the process, but their earnings are not upped.

When the process has completed, any images that were not located in any of your Catalogues are marked in red.

In the event that you add more images to a Submission after updating the usage history of those already there, the update can be run again. If the program detects that some have already been handled it asks if all images or just the new, additional images should be processed.

Clear Red Flags

The three preceding functions convert records to red in the main Stocksheet window in order to help you visually locate any errors or omissions. This function changes them back to ordinary, black text.

Install Account Codes

This installs the appropriate codes from your Chart of Accounts, if InView is in the folder. StockView first compares the names of the creators listed in Stocksheet, then installs any account codes assigned to them in the Chart of Accounts.

If no creator's code is in your Chart of Account, the Usage Fee code is entered.

Note: If you are trying to keep track of more than one creator or you are running a stock agency with a zillion different creators, assigning accounts for each creator lets the Receivables file generate reports detailing sales for each one. *(see Report by Account in the Reports menu of Receivables.)*

After entering a Usage Fee code, it finds and enters the code for Research Fee and Holding Fee, if they are included in the Submission These three Account Codes are required accounts in Chart of Accounts so you always have them.

Serial#s Out

Type or scan bar coded serial numbers into a Submission with this menu choice. A dialog box opens, again and again, asking you to enter the Serial Number of each image you are submitting. A new line is added to the Stocksheet for every number you enter. When the number is entered, you add any other information about the image you want included in the Delivery Memo.

Note: StockView does not look up matching captions and such for the Serial Numbers. If you assemble submissions in this manner, you probably want to re-edit a Submission form to include serial numbers and exclude other data for each image.

Serial#s In

The first step in marking images back in is to retrieve the posted Submission they went out with, then choose Serial#s In. A dialog box opens where you type or scan in the serial number of images that are being returned. StockView searches through the entries in the Stocksheet for the matching serial number and enters a 1 in the IN cell. The beep tells you it's time to enter the next number. Two beeps means the number you're looking for wasn't found in the Submission and waits for you to choose whether to continue or not. ◆ *Warning!*

> ***Warning!***
> Bar Code functions require unique serial numbers. If the same serial number appears more than once in a Submission, you'll confuse StockView. It enters the same image as returned repeatedly. Hey, it's only a computer. Garbage Out, garbage In.

Full Return

This converts all the images listed in Stocksheet to Returned status. The Submissions file normally handles returns for you, but if you've retrieved a Submission to Stocksheet work area, this quickly logs in all the images. ◆ *Tip* ◆ *Warning!*

> *Tip:*
> This is a great time-saver when a large Submission is returned, but a few images have been retained. Rather than tediously adjusting each line, mark them all Returned, then adjust just the few that are still out.

> ***Warning!***
> After making any adjustment to a Submission, you must re-post it to Submissions to keep your records current.

Font, Margins and Company Info

These are the EZ Graphics menus of Stocksheet . Their functions are described in detail in the Printing & Editing Reports chapter of this manual. These choices are only available while one of the report forms is open.

The Stocksheet file ships with Company Information turned off. To use it, choose All Company Info or any of the individual elements in the Company Info menu. Then choose On in the same menu.

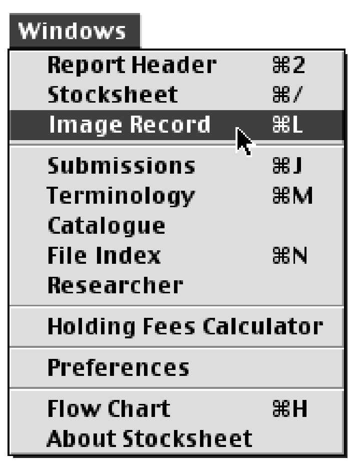
Windows

Whether you open Report Header or Stocksheet from the Windows or the Functions menu, each window operates in exactly the same way. They really belong in the Windows menu by convention throughout InView and StockView, but, to provide the Cmd/Ctrl 1-2-3 steps for creating a report, we duplicated them in the Stocksheet Functions menu.

Note: Stocksheet has two keyboard commands. Cmd/Ctrl-3 for the sequential report steps and Cmd/Ctrl-/ to switch from the Report Header to Stocksheet.

Image Record

This opens the Image Record window which displays one Stocksheet record at a time.



Submissions

This opens the Submissions file where posted Submissions are stored.

Terminology

Terminology Constructor is a file in which you assemble and store terms to be put into the Remarks cell of the Report Header. This menu choice is the same as clicking on the Terminology button of the Remarks cell in Report Header.

Catalogue

This opens the Catalogue file where it all began.

File Index

File Index is the directory for any Catalogue clones you may have created. It serves as a navigational center between the Catalogues. This opens it.

Researcher

This opens the Researcher file used for searching through multiple Catalogues.

Holding Fees Calculator

This opens the Holding Fees Calculator for use with analog submissions. The Calculator is discussed under Holding and Research Fees later in this chapter.

Graphics Mode

When you want to adjust the printed look of a report form, this is the way to get to the right window. There is a keyboard equivalent, Cmd/Ctrl-Y, to get there, too. Graphics Mode has menus and tools which appear in no other window in the files. Graphics Mode appears only in the Windows menu of report templates.

Preferences

To indicate the printing format you prefer and other default settings for new reports in Stocksheet, this opens the Stocksheet Preferences window in Flow Chart. Stocksheet has a lot of options, so they're covered a bit later in this chapter.

Flow Chart

Flow Chart opens the Flow Chart. We only have to say this a few more times. Or maybe next time we'll let you fill-in-the-blank.

About Stocksheet

The version, copyright and author information about Stocksheet lives here. *Tip* ➧

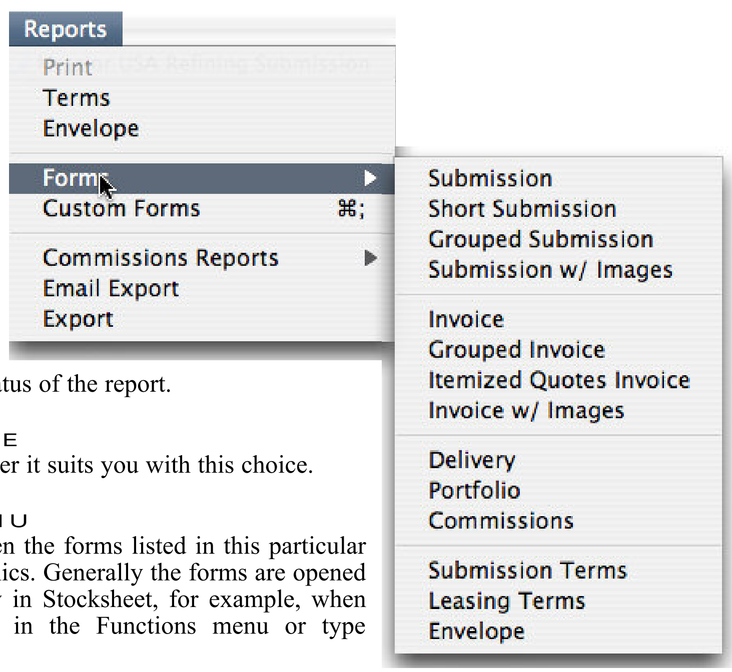
Expert Users' Tip:
Hold down the Shift key while selecting About Stocksheet in the Stocksheet window and the menus adjust to include full Panorama Search, Sort and Math menus. Repeat holding the Shift key and select About Stocksheet to revert to HindSight menus. Play with the Panorama menus at your own risk. We do mean Expert. Misuse can trash data quickly.

Reports

Print Terms

This opens the Terms template and goes into Printing mode. These are the terms you may want to print on the back of Submissions and Invoices.

Note: As described below, there are two templates for Terms. One is for Submissions, the other for Invoices. Print Terms decides which to print by looking at the Status of the report.



Print Envelope

Print an envelope whenever it suits you with this choice.

Forms Submenu

Most of the time you open the forms listed in this particular submenu to edit the graphics. Generally the forms are opened and printed automatically in Stocksheet, for example, when you select Print Report in the Functions menu or type Cmd/Ctrl-5.

All of the report forms can be edited to suit your needs in Graphics Mode. We encourage you to personalize the forms. Elements can be borrowed from one form and placed in another. You can mix and match parts of these reports or add elements of your own. But please, make a fresh back up copy of your StockView files first. It's the safest way.*(see the chapter on Printing & Editing Reports.)*

Submission

Submission is the standard form used for printing when the Status in the Report Header is set to Submission and Print As is set to Itemized. It is the default Submission form when Print is activated. It's a typical delivery memo, listing each line entered in Stocksheet along with a serial number and count. Terms can be printed on the back. If you want every image detailed in the memo, this is your report.

Short Submission

This prints Terms on the front of your report along with a line-by-line listing of images in the delivery. Captions are shortened to fit on one line. It's a good form for a Submission a half dozen or so images. Terms take up some printing space.

Grouped Submission

This report form is used when the Status in the Report Header is set to Submission and Print As is set for any type of Grouped report. Lines of Stocksheet are combined into groups by Caption, Creator or Format and print with a count total for each group. This reduces lengthy Submissions to concise and coherent lists. Instead of 10 lines listing identical information, each with a different serial number of course, this report assembles the lines into a single line representing each group.

Submission w/Images

Dazzle your clients! Submit digitized images from disk or CD in your printed reports. If you have a color printer you can include color images. Thumbnails and other low resolution images are very impressive.

If the image was properly installed in Catalogue, there's no problem getting it to print here. Naturally, the source folder, disk or CD must be currently accessible, you know, on-line... in the slot, hooked up. *Tip*

Tip:
Digitized images can be entered in Stocksheet even if they are not in Catalogue. To the extreme right of the Image Record window is a button titled Get Image. (See the section in this chapter on Image Record for details.)

Invoice

Here is the standard form opened when you choose Print Report and Status in the Report Header is set to Invoice and Print As set to Itemized. This form lists each line entered in Stocksheet, the serial number and price. Terms can be printed on the back.

Grouped Invoice

This form is used by Print Report when Status in the Report Header is set to Invoice and the Print As is set to any type of Grouped report.

Itemized Quotes Invoice

This is the only form designed to include Usage Remarks you entered in the Image Record window. While the other Invoices include prices for each line, this form lets you list different usage for every line of the Invoice. Not all things in life are the same.

Invoice w/ Images

This is the Invoice counterpart to the Submission w/ Images described above.

Delivery

Much like a Submission form, this form is reworded to apply to job deliveries. Otherwise, as shipped, it's layout is identical to the standard Submission.

Portfolio

This report is also shipped in a format much like the standard Submission form. The wording has been modified to apply to Portfolio Submissions.

Commissions

This form is used by the Commissions Report described below.

Submission Terms

Terms are the heart of any deal and this report, as shipped, has a full page text block with legal terms and conditions applying to the Submission or Invoice. This can be printed on the backside of any of the reports. *Warning!*

Warning!
HindSight and most professional trade organizations emphasize that Terms are intended as a model and not a substitute for legal advice to conform to your needs and local circumstances You are encouraged to install your own terms in place of the sample Terms installed in the software when shipped.

Leasing Terms

This is the form that StockView uses when you select Print Terms from the Reports menu and Status is set to Invoice.

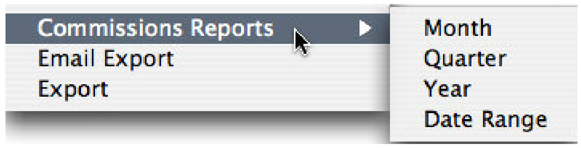
The popup menu in each of these Terms window lets you select alternate terms which are stored in the Terms & Conditions folder. The menu also allows you to create new terms or rename existing terms. The set of terms in the folder bearing the same name as the Terms window is the default: the one that is automatically selected when the window first opens.

Envelope

This opens the envelope form. It's just that simple.

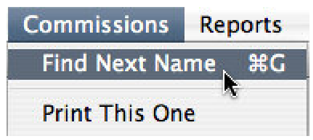
Commission Reports

For stock agents or others needing to pay commissions on licensed images, the Commissions Report provides the information you need for each individual.



The Commissions Reports submenu lists the periods for which you can generate a report. Choose one and you're asked to specify the involved dates. The program pulls applicable items from Receivables and compiles the report and offers to print it.

A page, or pages if necessary, is printed for each individual Creator listed. If you cancel the printing, you can use the Commissions menu - only available in the Commissions Report window - to scroll from one Creator to another within the report window to type in any comments to them. The Comments area within the report template is set for you to type any notes of comments to be included to the individual.



When ready, choose Print This One to print just the currently displayed Creator's report or choose Print Report in the Functions menu to proceed to print a report to each one.

The reporting process looks up each Creator's address and their commission rate from the Special Numbers in Contacts. The commission rate gets dropped into the Tax Rate column of Stocksheet for the purpose of this report. You can change the rate on the fly in the Datasheet view then use Calculate Report to have the totals re-done. When ready print as you would any other Stocksheet report. *Tip* ➧

Tip:
The commission rate is pulled from the Special Numbers in Contacts.

In Contacts, go to the Billing and Shipping pane. There's a field there for "Special Number". The popup menu lists "Commissions". Choose that, then enter a number representing the percentage of their commission. A 50% commission rate should end up represented in the cell as "Commissions (50)".

Note that the report data is not saved or posted anywhere after printing. Print and save copies for yourself.

EMail Export

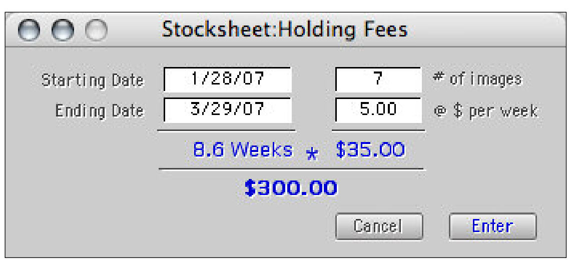
What do you do when the client needs the paperwork right away. Use EMail Export to create a nicely formatted text document of an invoice or submission. When the text file is attached to an email it, since it's text, it typically shows up on the recipient's end as any other email rather than as a separate attachment. *Tip* ➧

Tip:
Better than a text export, create a PDF file using any of the printing templates.

Export

Do what you will with it. This export saves a tab delimited text file containing the pertinent parts of an invoice or submission for importing into some other software.

Research and Holding Fees



For analog images, Stocksheet has some wonderful shortcuts to help make entering Research Fees and Holding Fees on Invoices as easy as possible. Wording and amounts for Research Fees are entered automatically when you enter only the letter r or R in the Caption field and close the field. StockView knows you want the entry for Research Fee and fills in the words "Research Fee," then installs the amount of the fee you pre-set it in Preferences for the Price. If an amount is already entered in the Price field, StockView does not replace it, though. You're the boss.

Holding Fees are almost as simple. When you choose Holding Fees Calculator from the Windows menu, StockView first checks the Submission Date and Return Date. If no Return Date is entered, it assumes that today is to be used. The Holding Fees Calculator opens with the Submission Date and the Return Date entered. From Preferences it also has the Holding Fee per image, per week entered. You need only enter the QTY of images to be factored. When you've made these entries, the calculator factors the total fee, accurate to the day. Click the Enter button and the amount shown as the Holding Fees is installed in a new line in Stocksheet.

"I'd like to live like a poor man with lots of money."

Pablo Picasso

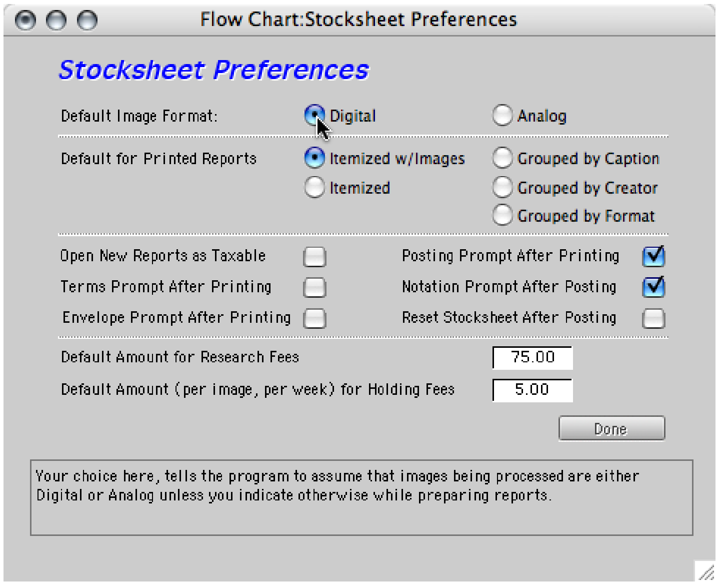
Stocksheet Preferences

Preferences allow you to predetermine many things about the way Stocksheet performs its duties for you. Preferences are accessed by selecting Preferences in the Windows menu. This opens the Flow Chart which contains the Stocksheet Preferences window. These Preferences can be changed at any time.

Default Image Format

Your selection here tells the software to assume that all new reports being generated are either Digital or Analog. This selection can be overridden at any time by changing the setting in the Stocksheet Report Header.

More than anything else, this selection determines whether you see the Analog or Digital Image Record window when choosing Image Record from the Stocksheet Windows menu.



Default for Printed Reports

The default determines how reports print if you do nothing but choose Print Report. Stocksheet knows by your default settings which format to use whether the report is a Submission or Invoice. Defaults are meant to ease your day, not lock you in. You can use another format whenever you wish by choosing an alternative in the Print As popup menu in the Report Header.

Itemized w/Images

Ideal for use with digital images, Itemized w/Images lists each and every image, it’s licensing information and a display of the image itself.

Itemized

An Itemized report lists each and every record in Stocksheet. This is as detailed as it gets. If you want all images listed individually this is the only way to go.

Grouped by Caption

All records with the same Caption are grouped together. No matter how many are in a group, one record, with a count in QTY, is printed to represent each group.

Grouped by Creator

All images attributed to the same Creator are grouped, Here too, a count is printed in the QTY for each group.

Grouped by Format

This puts all images listed with the same format into groups. Again they’re all counted and the number is printed with each group.

Open New Report as Taxable

This a checkbox that allows you to have all new reports open with the Taxable box in the Report Header already checked as Taxable. It’s not so much to get out of a mouse click as to avoid errors. If you’re in a burdensome locale where, more often than not, you must charge tax, then click this Preference. You can override it in specific instances.

Note: It doesn’t matter if Submissions have the Taxable button checked since there are no charges in a Submission, thus there can be no tax anyway.

Envelope Prompt After Printing

As shipped, StockView automatically offers to print envelopes for Submissions and Invoices immediately after printing the reports. If you turn off this prompt by unchecking the box you can still print envelopes, but you need to choose the envelope form from the Reports menu each time you want an envelope.

Terms Prompt After Printing

You may choose to suppress a separate printout with every report. You can still print the Terms document when you want to include it, but you must choose that from the Reports menu. If you want a reminder of this after printing every report, check it.

Posting Prompt After Printing

Do you want to be reminded to post reports when you print them? If so, check it.

Notation Prompt After Posting

Same kind of stuff. Do you want to be asked about adding a notation to the Transaction cell for the Contact when you Post a report? If you do, check this, too.

Reset Stocksheet After Posting

After the printing and posting is done, do you want all remnants of the report cleared from Stocksheet? You know what to do to make it happen: check it.

Research Fees

The Research Fees cell lets you assign a default amount for Research Fees. Enter the numbers here. Now all you do is type r or R, nothing more, nothing less, in the Caption field and press Tab. Stocksheet fills in the words “Research Fee” along with the amount you entered.

Holding Fees

The Holding Fees cell lets you assign a default amount for Holding Fees for each image on a weekly basis. This number is used as the default in the Holding Fees Calculator.

Deposits and Payments

Stocksheet treats negative Prices with no account code as payments or deposits received. It adjusts the balance due accordingly. Usually when you receive a deposit or payment it is entered as a payment to an outstanding invoice in the Receivables file.

If you receive a payment of any sort that has not yet been invoiced, create an Invoice for that amount. Then add an additional line for the payment and enter the amount in the Price field as a negative amount. DON’T enter an account code. Post the Invoice and, if you did things right, it’ll show with a zeroed balance. *Tip* ➧

Tip:
If you’re using InView’s Checkbook and Receivables, and the invoice is already posted to Receivables you can enter a New Deposit to Checkbook and Post the Deposit to the Invoice. *(see Checkbook deposits to Receivables.)*

There may be times, however, when you want an Invoice to show that a deposit has already been paid and have that amount subtracted from the Invoice total. For instance a Research Fee was paid and now needs to be credited against the leasing fee. In this case, enter the payment or deposits on a separate line in the Stocksheet with a negative amount in the Price field and DO enter an Account Code. The Account Code should be the same as the Research Fee to make it a credit applied to that account.

An Account Code should only be entered for negative amounts if you are giving a discount or applying a credit.

Creating a Report

As we said at the outset, a new Submission or Invoice can start from either Contacts or Catalogue.

To start in the Contacts file, InView must be installed, of course. In Contacts or Stocksheet, use Cmd/Ctrl-1 to locate the Contact, then choose Stocksheet in the Transfer menu or click on the Transactions popup menu of the Contacts Data Record and select one of the Stocksheet options to transfer the Contact's data into the Report Header of Stocksheet.

In any one of your Catalogues or in Researcher, choose Prepare New Submission - located in the Submit menu - Stocksheet opens, cleared of any other report's remnants and ready for you to add data, starting with the Contact name. If the Contacts file is available, just type the Contact's name into the Stocksheet Report Header and StockView takes care of the rest.

In either of the above scenarios you next add the images. Select them in the Catalogue or Researcher and use Add Selected to a Submission in the Transfer menu. Continue adding images from one or several Catalogues until the Submission or Invoice is complete. *Tip*

> *Tip:*
> Use a digital shortcut to add images to Stocksheet. Open the Digital Record window and drag images one by one or as sets, on to the image display area. The images are added and any applicable metadata is read and installed.
>
> The only downside is that unless separately entered, the images are not in your Catalogue for future use and reference.

An alternative method is to start by moving the image records into Stocksheet and then fill in the Report Header. After selecting the images for the Submission, use Selected to New Submission. If more images are to be included, use Add Selected to a Submission.

After the images are entered into Stocksheet, refresh your memory of the Cmd/Ctrl 3-4-5-6 sequence we discussed earlier by looking at the key command to the right of each menu choice in the Functions menu and complete your Submission.

Note: No matter which way you start a Submission, if StockView sees that the Report Header is already filled in, it pauses to ask you if you want to replace that data with the new contact information. If you say OK, it dumps *all* the data in Stocksheet to prepare for the new report.

Set the Status to Submission, Invoice, Delivery or Portfolio. When you change the Status, StockView looks up the contact's data. If the report is an Invoice, StockView checks for information entered in the Billing Address window of the Contact's record. If there is information different from the contact's primary working address, the Billing Address data is installed.

If your current choice isn't already showing, click on the Print As popup menu next to the Status cell to indicate your report preference for printing the report.

Now, fill out the appropriate cells on the right. If you're submitting images, click on the Submission Date button to enter today's date or type in a different date.

If you're preparing a Submission, click on Submission# and StockView opens the Flow Chart file and looks up the number for you. Of course you can type in your own number. For an Invoice, click on Invoice Date to enter today's date and click Invoice# to have StockView issue a number.

Enter a Purchase Order number, if there is one, or click on the words to install a standing PO number from the Special Numbers cell in the Contact's record.

To select the Holding Time for a Submissions or the Terms for an Invoice, click the Holding Time button to install fourteen days for Submissions or thirty days for Invoices. You can enter any other number of days that you want in the cell. Holding Time prints on Submissions as the number of days that the images may be held until holding fees are applied. On Invoices the number indicates the number of days allotted to make payment. After that time you can try friendly reminder no. 1 with veiled threat.

The next step is to enter a Reference about the report. The Reference is included in Stocksheet printouts and is used in the Submissions and Receivables files as one of the ways to locate reports.

Remarks is the place to elaborate on Submission terms, rights you are leasing, selling or whatever you want to include in the agreement. You can click on the button to open the Terminology Constructor, assemble remarks there and transfer them to the Report Header. *Warning!*

> ***Warning!***
> Reference and Remarks are set to display a limited amount of data in the printout. They can hold considerably more than what shows on screen but it's not limitless. Adjust the printing templates using the EZ Graphics Margins menu. Choose Remarks to increase or decrease the printing area. *(see Printing & Editing Reports.)*

The next step is to open the Stocksheet or the Image Record. For analog images, review the QTY field for each entry to make sure that the numbers are right. Each entry is set to 1 when you start the entry. Adjust the quantities if it's necessary. It's a good practice to look over the next fields: Creator, Serial#, Format, Value and Location, to be sure they're complete and correct, too.

Note: If you have additional images to submit, go to Catalogue, select the images and use the menu item Add Selected to a Submission. These are added to your Stocksheet without disrupting the existing entries.

You could skip Calculate Report and go right to Print Report. Print Report knows to perform the calculations if they haven't already been done, but for a preview, you may want to calculate the report, look it over and then request the print out.

Finally, Post Report. This puts a Submission in the Submissions file where it ages. Your stored report is now available for review or retrieval to Stocksheet for modification or, if things go well, conversion to an Invoice.

An Invoice requires Prices and Account Codes whereas a Submission doesn't. A posted Invoice goes to the Receivables file... if InView is in the folder with StockView. Ahem. Did we mentioned that before?

When the report is posted StockView offers to add a notation about the report to the Contact's record. If there is no record for this contact, it offers to create one and uses data from the report to get it started.

A Submission is not altered or deleted when you retrieve it from the Submissions file to Stocksheet. You can look at it and close it. It remains as it was. If you make changes, however, you must re-post it to record and save your changes.

Converting a Submission to an Invoice does not affect the Submission posted in the Submissions file. It's desirable to have copies of both the Submission and its Invoice on file for leased images. You want to separately track outstanding Invoices and images that are out. A Submission posted in the Submissions file and its corresponding Invoice posted in the Receivables file, applying to the same images, are separate entities, each keeping tabs on a completely different kind of data about the images. The Submissions file continues to track the outstanding images. The Receivables file maintains a record of the financial obligations for those images.

Digital Deliveries

Whether it's a job, a submission or a license, Stocksheet provides specialized tools to protect your work while delivering it professionally.

With your images in Stocksheet and all client data entered, choose Build Digital Submission. located in the Functions menu.

A folder is created and loaded with the indicated images. With your approval, Stocksheet writes metadata to the images in the process using the terms in the Report Header, unless individual terms are entered with any of the images.

Include the appropriate report (delivery memo, invoice, submission...) as a PDF file and make the entire folder available to the client on a disk, email or by ftp.

Post the report then, if it's a License, finish up with a License Reminder, also located in the Functions menu.