

In View & Stock View V  
QUICK GUIDE

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**HindSight Ltd.**<sup>®</sup>

SAUGATUCK, MI 49453

SALES (303) 791-3770

Web site: <http://HSLtd.us>

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# I N T R O D U C T I O N

## W E L C O M E T O T H I S S E L F G U I D E D T O U R O F I N V I E W & S T O C K V I E W V

There's a lot to this tour, but then there's a lot to the real thing. After all, your business is no small matter. Is it?

If your interest is stock or digital photography, focus on Catalogue.

Are you a people person? Check out the tools in Contacts for marketing and keeping in touch.

If you're the one in charge of the books, go to General Ledger.

In all cases, a review of the Features List and Interface Basics is going to help you understand what you're seeing a little better.

Don't miss cool features like the Custom Window Colors described in the Interface Basics chapter. See the Flow Chart for a map and navigational aid to InView & StockView. Learn about the extensive modifications for printed reports under Graphics Modifications. And check out the Testimonials of those who've chosen InView & StockView for their businesses.

Notice that throughout the programs, most windows have interactive help. As you move the cursor over buttons and data cells, a display at the bottom of the window updates to explain the item's purpose.

This InView & StockView Demo is a fully functioning copy of the software with only a few deliberate demo obstacles installed.

Invoices and estimates in this demo are set to use professional photographic terms & conditions. Modification for other graphic arts professionals takes seconds - really. See the chapter here on Terms & Conditions for details.

Each chapter explaining the purpose and functions of an InView & StockView file begins with a quick description of the file. It is followed by more detailed explanations. Italicized type indicates that the text describes actions for you to take in order to follow the tour. Plain text is used for the explanations. By skipping most plain text and scanning for italicized text you can dash through the tour.

This tour cannot possibly cover all the features and functions built into InView & StockView. It will ignore many features and provide only a cursory look at others. The full User's Guide is a well indexed and illustrated reference book that provides detailed instructions on using any part of the program. The entire manual is available as a whole or as individual chapters for download in pdf format from our web site at <http://HSLtd.us>. The site also provides tips and support forums to help you get more out of InView & StockView.

As indicated in the Pricing and Ordering Information, InView & StockView are available as a set or as modules. As a set, the first impressions can be daunting; it is a lot of software. Most customers work their way into it slowly, using only the parts they need. The programs are designed so that you can use some parts without using others. This is especially true of the financial record keeping portions of the program.

Start your tour by reviewing Interface Basics and then Flow Chart. Don't be afraid to try things in the files. You can't break a thing. Click on menus and buttons.

This demo may be distributed freely, without charge, in the original downloaded format or in an expanded form as long as the folder remains complete and is accompanied by this Documentation. Anyone may download this free demo from our web site at <http://HSLtd.us>.

### PRINTING NOTE:

This demo does allow you to print any of the included reports, although some may get a "Demo" note added in the process. Printers and computers vary, so it may be necessary to go to Page Setup in individual reports before they can print or preview properly.

Since some files access printing templates once the Print command is given, Page Setup is best accessed by giving a Print command and cancelling the Print dialog. This ensures that you're in the right place to properly check the Page Setup. Go to the File menu and choose Page Setup. Be sure your printer is selected and that the Scale is set properly.

You can also use the Cancel in the Print dialog to allow you to Preview instead of printing. Save a tree!

When you Save, the Page Setup is preserved for future sessions.



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# F E A T U R E S

InView & StockView are an integrated set of relational data files capable of working together or as independent modules. In any configuration, they remain solidly entrenched as the fastest and most comprehensive programs of their kind. At the same time they have the lowest requirements of RAM on disk space.

## I N V I E W

The full business management package consisting of the Flow Chart, Contacts, Date Keeper, Correspondence, Expense Log, Task Timer, Theorizer, Chart of Accounts, Tax Codes, Worksheet, Terminology, Licenses, Estimates, Open Jobs, Receivables, Payables, Checkbook, General Ledger and Equipment files.

- Full-Featured Personal Information Management
- Unlimited Custom Report Forms in Contacts
- Marketing Notes, Profiles and Reminders
- Versatile Keywording and Other Marketing Identifiers
- Numerous Rapid Search Features
- Word Processor with Automated Letter/Fax/Email Mail Merge
- Stores and Retrieves Hundreds of Form Letters
- Bulk Email Capability
- Date Keeper with Prioritized To-Do Lists and Goal Tracking
- Reunites and Synchronizes Files Used on Separate Computers
- Invoices, Estimates, Confirmations, Job and Budget Reports
- Receivables File with Numerous Reports
- Integrated Checkbook for Multiple Checking Accounts
- Payables File with Recurring Entries
- Integrated General Ledger with Automatic Posting
- Equipment Data File with Insurance and Packing Lists
- Password Security on Financial Files
- Exports in customizable formats for PalmPilot, iPhone and Others
- Imports text files exported from other Applications

## S T O C K V I E W

An image cataloging, researching and submission tracking system consisting of the Flow Chart, Catalogue, Cross References, File Index, Researcher, Stocksheets, Terminology, Licenses and Submissions files.

- Reads, Writes, Imports and Exports META data embedded in JPEG, TIFF and PSD files
- Generates HTML Pages of Thumbnails for your Web Site
- Automated, Multiple Level Cross References
- Numerous User-Defined Serial Numbering Systems
- Displays PICT, JPEG, TIFF, PSD and Other Images at Any Resolution
- Convert images from one format to another
- File Searches for Multiple Subjects Simultaneously
- Prints Stock Delivery Memos and Leasing Invoices
- Prints Images in Delivery Memos and Invoices
- Delivery Memos and Invoices Link to InView's Contacts File
- Submissions Tracking and Aging with Letters for Late Notice
- Posts Leasing Invoices to InView's Receivables
- Tracks Licenses and Generates Advisories for Expiration and Renewal

**S H A R E D F E A T U R E S :**

- Industry Specific Terms & Conditions for Various Graphic Arts Professions
- Swap or edit Terms & Conditions Contracts in seconds
- EZ Graphics for Simple Graphics Adjustments and Form Design
- PDF or Email exports for Estimates, Invoices or Delivery Memos
- Numerous User-Defined Defaults and Preferences
- Extensive Searching and Sorting in All Data Fields
- Professional Terminology Constructor for Licensing Usage
- Licensing Module to Construct and Track Licenses
- Fully PLUS compliant
- Professional Style Forms and Terms
- Fully Customizable Reports and Labels
- Customizable Window Background and Text Colors
- Thorough, Easy-to-Read Documentation
- Interactive Help System Throughout
- Minimum Usage of Valuable RAM and Disk Space
- Twenty Five Years of Evolution and Refinement
- Macintosh and OS X Compatible
- Windows 2000, XP and Vista Compatible
- Free Technical Support Via the HindSight Web Site at <http://HSLtd.us>



# I N T E R F A C E   B A S I C S

This demo and documentation assume that you have at least a rudimentary understanding of how to operate your computer. If you don't know the difference between a file and a folder, or how to click and drag, you should first refer to your Computer's documentation. An understanding of these terms and others is important in using your computer, period. Without a knowledge of the basics you'll never get full value out of any software.

The chapters contained in this document are abbreviated descriptions of working with the InView & StockView components. The complete chapters and several supplementary documents are available for download from our web site. See <http://HSLtd.us/reference/reference.html>.

## M A C I N T O S H   V S .   W I N D O W S

This tour is written for both Macintosh and Windows users. In a very few instances we've noted the features that are not available on both platforms.

The Macintosh and Windows operating systems offer most of the same capabilities, but trigger them in different manners. It's therefore very important for you to know what we mean when we mention keyboard commands.

The Command key on Macintosh is equivalent to the Control key on Windows. This tour identifies them together as Cmd/Ctrl. For instance, Cmd/Ctrl-S is the keyboard command for Save. Macintosh users press Command-S, Windows users press Control-S.

The Option key on Macintosh is the same as the Alt key on Windows. They are identified together as Opt/Alt.

The Macintosh does have a Control key, but it is not the equivalent of the Control key on Windows. It is matched by the Right Click on Windows. They aren't used often, but when they are they'll be identified as Cntl/RClick.

When keyboard shortcuts are the same you'll be given one choice. Shift-Double-Click means the same on all computers; hold the shift key and double click.

### Reference:

**Cmd/Ctrl** is  
Command on Macintosh  
Control on Windows.

**Opt/Alt** is  
Option on Macintosh  
Alt on Windows

**Cntl/RClick** is  
Control on Macintosh  
Right Click on Windows

## I N T E R A C T I V E   H E L P

Throughout InView & StockView, Interactive Help is available. This will help you to learn many of the basic functions by simply using the mouse to point at an item in most windows. In those windows featuring it, an area at the bottom of the window updates with text describing the feature you're pointing at..

While touring this demo we strongly urge you to use the Interactive Help. In fact, you'll miss many of the features that this documentation assumes you'll see in the Interactive Help. When you can point at an object on screen and get a description of its functions, it will mean much more than having this documentation trying to tell you where it's located on the screen as well as describing what it does.

## B U T T O N S   A N D   P O P U P   M E N U S

InView & StockView windows use buttons and "popup" menus to make things happen. For instance, the InView & StockView diagram in the Flow Chart has buttons to open the file named in their title. A single click on these buttons triggers the action. Click once on the Contacts button and the Contacts file opens.

Notice that unlike the other buttons, the Catalogue button has a downward pointing triangle on its right end. Wherever you see this type of button it indicates that the button actually triggers a popup menu to provide a selection of actions. Click and hold on this type of button to see the menu. While depressing the button on your mouse, slide down the menu to highlight your choice and release. In this demonstration only the first choice on this particular popup menu, Catalogue, actually does anything. The menu gains functionality when you're managing large amounts of image data. The demo bears only a small amount of data.

As you move the mouse over these buttons you'll notice that the cursor changes to give you a visual clue about the button's type. The pointing finger indicates a standard, one-click button. When it's over a popup menu the cursor changes to a small menu icon. In some cases this menu icon has a pattern to remind experienced users of additional actions available by using the Alt, Option, Command, Control or Shift keys.



## N A V I G A T I N G   F R O M   F I L E   T O   F I L E

Throughout InView and StockView, most actions can be initiated by the keyboard or, if you prefer, the mouse. Using the mouse lets you explore the menus and buttons fully before making a choice. Keyboard commands let experienced users, those familiar with the menus and buttons, move around more quickly.

Using standard techniques, you can open files by choosing Open File from the File menu or by using the keyboard command, Cmd/ctrl-O. These open a scrolling dialog box that lists the files available to you. In this dialog box you use the mouse to scroll to the name of the file that you want to open or type the first few letters of the file's name and the menu automatically scrolls to that choice. When you arrive at, and highlight your selection, click Open or press the Enter key or double-click on the file name and the file you chose opens.

Several files have the names of related files listed in their Windows menu, often with a keyboard command listed at the right. This makes it simple to access the files that relate to the task at hand.

## M E N U S

Certain menus appear in just about every InView & StockView file. The File menu contains a number of standard operations such as Open, Close, Save, Print and Quit. The Search menu contains selections designed to help you find information. Its items change to suit the searching needs associated with the individual files. The Windows menu helps to get you from any window to other files and windows that are relevant to the window you're viewing at any given moment.

## C E L L S

Wherever you enter data into the program, you're typing into a text box of one sort or another. These boxes are called cells.

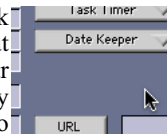
## W I N D O W S I Z E S

What you see on one computer may be very different from what you see on another. So don't be surprised if it looks different on your laptop than it did on your 32" MaxySink monitor. InView & StockView assess your monitor size and color and open windows according to what they learn. On a big monitor windows open in various regions of the screen and never have scroll bars. On a 9 inch B&W monitor, the buttons shift to black lines on white and most windows have either vertical or horizontal scroll bars to provide access to hidden parts of the window. Some monitors, such as a Portable's screen wind up with a little of each.

## C U S T O M C O L O R S

As you move around within InView & StockView, you're bound to notice a lot of grays or shades of blue. Nice metallic look, don't you think? Gray might be easier to live with than chartreuse, but if you prefer lilac or red, it's yours. Virtually every data entry window in InView & StockView has customizable colors. Printing forms and dialogs do not contain this chameleon trick.

To change the background colors of a window, hold the Opt/Alt key as you click anywhere on the background within the window. InView isn't real picky about where you click, just miss the buttons, cells and other window components. Your double-click is rewarded by the System Color wheel or palette. Pick a color, any color, and then click OK. Do you like that. No? Then try again. There's no limit to how many times you can change the colors, so experiment with the hue and saturation.



The color behind the data entry cells is adjustable too. Hold the Cmd/ctrl and click on any part of the window's background and you're in the color wheel again.

These same windows have colored text in them. This text is the Prime text. They contain what's likely to be the more important information and the color should be used to draw your eye to it. If you'd like a new color for this text, hold the Cntl/RClick key and double-click on the background.

The remaining elements, the other text and the buttons are not able to be re-colored.

OK, so you've played with the colors for a while and now you just want to start over. Or all of a sudden you decide gray wasn't so bad after all. It's not our default, we knew this could happen. No problem though. To restore the default colors, hold the Shift key and double-click on the background. You're back to safe gray and blue Prime Text.

## T A B , E N T E R A N D R E T U R N

Obviously one way to get from one place to another within a window is to use the mouse to click on wherever you want to work. But as you enter data, knowledgeable use of the keyboard can greatly aid the process. When you've entered data in a cell, the Tab key closes the cell and moves to the next cell in the sequence opening it for your input. The Enter key closes the cell too, but remains in that cell instead of moving on. The Enter key on Windows closes a single line cell but will Return to the next line on a multi-line cell.

If a cell is only a single line high, the Mac's Return key can be used to close the cell, but in cells more than a single line high the "Return" key will add lines within the cell. For this reason, the best habit to develop is use of the Return key when you want a carriage return within a cell and the Enter (Macintosh only) or Tab key for closing a cell.



Cells can also be closed with a single mouse click elsewhere in the window.

## T O O L   P A L E T T E S

Many windows have a tool palette running vertically down the left side of the window. The standard palette contains six tools. The first four are up and down arrows used for moving from one record (or entry) to another within a file. The top arrow with the line moves to the top record. The upward arrow below it moves up one line at a time. The third arrow moves down one record at a time. And the last arrow, pointing downward with a line, moves to the last record.

The L-shaped arrow adds a new record to the file.

The scissors tool deletes the record you're viewing, known as the current record.

## S P E L L   C H E C K I N G

While you're editing a cell, meaning the cell is active, the edit menu adds the option to check spelling, Cmd/Ctrl-I. Click to insert the cursor at the point from which you want the spell checker to begin checking and press Cmd/Ctrl-I. The spell checker scans the cell and highlights the first suspect word that it finds.

On Macintosh, hold both the Control and Option keys and click on the highlighted word.

On Windows hold the Alt key and Right click on the highlighted word. A popup menu appears listing possible substitutes for the misspelled word.

If you choose one from this list, the suspect word is replaced by your choice. Press Cmd/Ctrl-I to resume scanning the cell. The spell checker stops when it reaches the end of the cell.

If you have a word that you're uncertain of, rather than having the whole cell scanned, double-click on, or drag across the word to highlight it. As before, on Macintosh, hold both the Control and Option keys and click; on Windows hold the Alt key and Right click to get the list of suggestions.

## C O M P O N E N T S   O F   A   F I L E

All HindSight files have a window called the Data Sheet which is the core of each file. The Data Sheet is where all the data in a file is displayed in rows and columns. Most files have additional windows which let you look at all or parts of the data in other ways also. Some files, such as Worksheet, have several windows for viewing and printing the file's contents. A few files have only one window and no access to the Data Sheet.

In the Data Sheet each horizontal row represents one entry, a Record, in that file. Each vertical column of information is a field. For example: Address, City, and State are individual fields which can contain different information from record to record. The point at which a record and a field intersect is a cell. A cell holds one piece of information. For instance a City field has different cities listed, one for each record. A single city name, such as Chicago, is in a cell which is listed in the City field of a particular record.

Learning to use multiple windows is very helpful. Two or more windows from one file can be open at once so you can have different views of the same or related data. You can also open Windows from other files at the same time. If you manage to open a blizzard of windows and have no idea what you are looking at, take a look at the title bar at the top of any window and you'll see the name of that window.

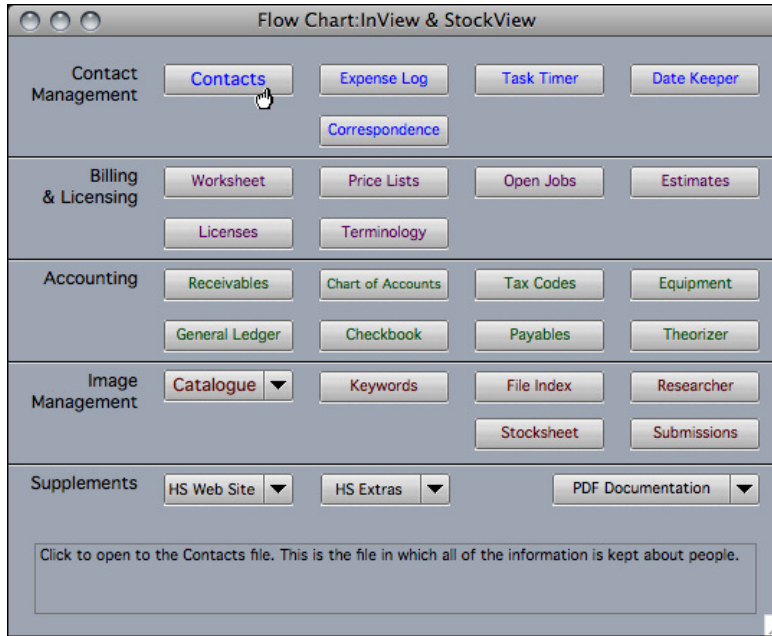
Only one window at a time is "active". The active window is the one that's fully in front of the others. Look at its title bar. No matter which platform, the active window's title bar is different than those in the background; either with multiple horizontal lines on the Macintosh or a bright white name on Windows. Other windows that are open but inactive have just the name of the window, no stripes, and their names are in a dull gray.

A Data Sheet often has much more information, more fields, than you can fit across even the largest screen. You can select and view all records or only some of the records, but each record in the Data Sheet shows all the fields in horizontal rows. You can split the Data Sheet window into two scrollable sections making it possible to simultaneously see columns that are actually far apart in the data sheet row. The "splitter bar" is a small black rectangle located just to the right of the left-hand scroll arrow at the bottom of the Data Sheet window. Position the cursor on the "splitter bar," hold down the mouse button and drag the splitter bar right to divide the screen or left to return to a single screen view.

# F L O W C H A R T

Flow Chart is a quick reference to the structure and basic purpose of the components of the software. Flow Chart shows the InView & StockView files. Flow Chart is also quite involved behind the scenes, directing the behavior of all the rest of the InView & StockView files. It sets and stores the Preferences that control many features for a number of the files.

Flow Chart is in the Windows menu of every HindSight file or use Cmd/Ctrl-H to open it. From the Flow Chart you can open any InView & StockView file by clicking on the button of choice.



## WINDOWS MENU

The first four items in the Windows menu represent the different configurations of InView & StockView that are available. Flow Chart converts to display the elements of whichever configuration you choose.

## PREFERENCES MENU

The Preferences menu opens other windows built into Flow Chart. Through these windows you can control many aspects of how the parts of InView & StockView behave. These are your preferences.

Except as noted, don't change preferences settings. They're set so you can see what each does throughout this demonstration.

Choose Company Profile from the Preferences menu. We have a sample business already entered. HindSight's EZ Graphics uses the Company Profile information in various forms and reports that the programs print. Each part, Company name, address, and phone number can be turned on or off from with the individual reports. Or they can be turned on or off for the whole program in the Company Profile window.

If you're outside the U.S., please note the next item on the Preferences menu, Date and Money Preferences, make InView & StockView suitable for international use by letting you fine tune the date format and monetary symbol to be used throughout the programs.

Choose Numbering from the Preferences menu. This window is where you tell the software what number you want it to start with in your various reports. It automatically increments the numbers upward from your setting here.

Choose Security from the Preferences menu. Using password protection, you can prevent unauthorized access to Checkbook, Payables, Receivables and the General Ledger. Access can be set individually for these files or applied universally.

Choose Worksheet from the Preferences menu. Here you determine how you want many of the Invoicing and Estimating functions to behave. Using the Tax Codes file you can identify any number of tax entities or combinations along with their various tax rates. Direct the printing of a Cash Advance to print with the Line Item detail of an Open Job or in the the subtotals as Less Credits or Payments. A prompt is an offer to initiate another action following the completion of one action. Some people like the prompts as reminders of what to do next, other people prefer to work on their own initiative. Accounts Codes allow for proper subtotalling, using your specified subtotal heading set in the last two settings in Worksheet preferences, as well as for setting your Cash Advance default account code. Defaults for Printed Reports let you specify your favorite format, which can easily be overridden at any time.



Choose Receivables from the Preferences menu. Here you determine what your default rebilling fee as a flat rate or as a percentage of the balance due. You also can turn on an envelope prompt and control how Receivables calculates reports.

Choose General Ledger from the Preferences menu. General Ledger preferences determine whether or not your company is a corporation, when your year begins, and whether or not you want depreciation calculated automatically. Prompts are reminders of what steps should be completed before closing any given month.

Choose Catalogue from the Preferences menu. Catalogue preferences are for automatically setting up links to the Cross Reference file and the File Index file whenever the Catalogue is active. This uses a slight bit more memory. Note that File Index is not included in this demonstration copy.

Choose Stocksheet from the Preferences menu. Like Worksheet preferences, Stocksheet preferences let you set defaults for printed reports and turn on prompts which initiate an action following the completion of another action. You can also set up your default amounts for Research and Holding fees.

META Defaults allows you to enter the Contact Info that you want to use in metadata and licenses - IF - nothing else has been entered instead. These are the default values.

Choose Computer Profile from the Preferences menu. Computer Profile is an information screen. You cannot change anything here, but you can learn some things about your computer. We use this information to help our customers troubleshoot problems. You can view the contents of your System Folder, Control Panels or your System Extensions, as well as the contents of the InView & StockView IV folder.

You may have noticed that the Preferences menu includes an inaccessible Sharing preference. With a proper access code InView & StockView can be configured for use on a network with as many as 50 simultaneous users.

Return to the Flow Chart window by choosing InView & StockView in the Windows menu.

# C O N T A C T S

Open the Contacts file. You can do this by double-clicking on the Contacts file in the InView & StockView demo folder, or by clicking on the Contacts button in the Flow Chart.

The Contacts file contains the information about all of the people with whom you're in contact. We call each person a Contact. The file opens to the Contacts Data Record which shows basic information about one individual. This is referred to as a record. By clicking on the page corner at the bottom left corner of the window you can move through three additional windows showing additional information about the same individual. The Views popup menu in the upper right corner also lets you select these different windows.

The screenshot shows the 'Contacts:Data Record' window for 'Marty Klientel'. The window is divided into several sections. On the left, there are navigation buttons for Client, Value, Tag, Prime, and Company. The main area contains fields for contact information: Name (Marty Klientel), Phone numbers ((212) 684-6889 Main, (212) 620-1845 Direct, (212) 620-1830 FAX), Company (The Plutocratic Advisor), Address (50 Sixth Ave., New York, NY 10011), Salutation (Marty), Job Title (Director of Photography), Business Type (Magazine), and Comments (7/14/05 - I signed a letter of agreement since he agreed on extra fees for foreign usage • 7/11/05 - we discussed all the the rights they're demanding for foreign editions • 7/6/05 - he says he likes my work, but needs me to sign their letter of agreement before he can assign work to me. I questioned the foreign usage clause. According to him it's "Company Policy"). On the right, there are buttons for Transactions, Correspondence, Task Timer, Date Keeper, URL (plutocratic.com), Email (marty@plutocratic.com), Country (USA), Tax Rate (E), Quick Picker, Phonetic Search, and Recent. A tip box on the right side of the window states: 'Tip: Move the cursor over items in the window. The Interactive Help at the bottom of the window displays a description of what the item does.'

The Data Record has three related views.

## MARKETING PROFILE

The Marketing Profile window holds information to help you make marketing decisions about a contact. Efforts help you to remember how many time you have tried to convince this contact to hire you. There are two large notes cells here. One is a note about the Contact, the other is a note about the Company and is shared by all other Contacts in the same company.

## EVENTS & NOTES

The Events & Notes window contains all of the various notes and comments entered during daily processing. For instance, when you print a letter from Correspondence, you're prompted to enter a Mailing Note or when you print an Invoice, you're prompted to enter a Transaction note. Click the Comments button. Notice that today's date is entered and you are in the correct position in the Comments cell to type in your new comment.

## BILLING & SHIPPING

The Billing & Shipping window is for alternate addresses of various sorts and shipping information. This information needs to be entered only if it is different from the Contact's address as entered in the Data Record view. Bill to name and address are transferred to the Worksheet when you create an invoice.

Special Numbers hold various default information for Vendors or Clients you bill. Add a default Account Number for a Credit Card or Vendor along with their default Expense Account Code. Enter a Tax Exempt Number for those Clients who have one so their number automatically prints on their invoices.

There are other views and accesses too. Some of these are available through the Windows menu. The Data Sheet and the Contacts List are two ways of seeing a large number of records at a time. If you only see a small number of names listed in these windows choose Select All in the Search menu and all 25 names in the demo are displayed.



**S E A R C H I N G**

Having lots of names and information is only useful if you can find whatever you want, quickly and easily. The Contacts file is loaded with tools for searching. We won't attempt to show them all in this demo, but will give you a few examples of ways to find information.

If you're not in the window titled Contacts:Data Record select Data Record from the Views popup menu in the upper right corner of the window. If you're in a Contacts window that doesn't have a Views popup menu, you'll find Data Record in the Windows menu at the top of the screen.

Not everybody's name is spelled as it sounds. If you have trouble spelling some names correctly you'll appreciate the Phonetic searching.

In the Contacts:Data Record click once on the button titled "Phonetic Search". In the dialog window that opens type Marsha Stevens then press the Enter key on your keyboard. Note the spelling of the name that is actually selected.

Phonetic Search has only two requirements. The first character must be correct, in order to attempt to locate a contact name based upon phonetic sound. And you must enter the whole name. To find Henre de Toulouse-Lautrec, you must enter the equivalent of Henry D. Twolooselaytrack.

Another way to search is to look for a specific series of letters, called a string, within the name. If you can spell any piece of someone's name, you'll find them very quickly using the String Search.

Click the magnifying glass, located in the lower right corner of the Contacts Data Record window, then type in ar. Notice that a list of names appears below where you typed. All of these names contain the string ar. Type one more letter, the letter t. Now the list is shortened to show just the names containing the series of letters a, r and t. You can double click on either name to select that contact's data record

Using the String Search you can find Henre de Toulouse-Lautrec by typing as little as he or tr.

The larger your Contact file becomes, the more useful the String Search becomes. Imagine you are looking for Jim and you don't remember Jim's last name. When you type in jim into the string search, all the contacts that contain that series of letters will be listed. You can then scroll through the list and you will most likely recognize the right Jim when you see it.

Of course, you may know exactly who you're after and prefer just a nice straight forward search. Type Cmd/Ctrl-I, or from the Search menu choose Select a Contact. Type in Se. Did you notice that the name Sean Fogarti pops into the search dialog. This is the Clairvoyance feature that activates as soon as you type enough letters for the program to know who you're after. In this case, no other name begins with se so the program makes its guess. Press the Enter key or click the Select button to select Sean Fogarti's record. When there are several names with the same beginnings, such as Martha, you need to type enough letters to get past the like portions. (Our sample files contain Marcia Stephens, Marty Klientel and Martha Concheros)

Selecting a Company works similarly. Type Cmd/Ctrl-~, or from the Search menu choose Select a Company. Type in Mc and you will notice that the name McCann-Erickson Worldwide pops into the search dialog. Press the Enter key or click the Select button to select the company.

Notice the record count at the bottom left of the screen; Viewing 1 of 3 selected records from 25 total in the file. There are three contacts for the company McCann-Erickson Worldwide. Use the down arrow on the tool palette to view the second match and then the third. The three have been selected. The other 22 records have been deselected and are temporarily hidden from view.

You can also view them simultaneously in either of the list views we mentioned earlier; the Data Sheet and the Contacts List accessed via the Windows menu.

**E V E N T S & N O T E S**

The Contacts file provides you with the ability to schedule each individual for up to three events. Usually marketing events such as promotional mailings, follow up letters or portfolio showings. These are typically loosely scheduled events intended approximately for the entered date as opposed to a fixed appointment on a specific date. Those are handled by the Date Keeper which we'll get to a bit later.

Click on the Due Events popup menu, in the upper right corner of the Contacts:Data Record window and choose Select Due Events. This selects just the Contacts that have an event due or past due. Notice that these contacts have a red asterisk appearing on the Views popup menu. Click on the Views popup and choose the Events & Notes view.

Notice the record count is now at seven selected. There are seven Contacts with due events. Use the up and down arrows on the tool palette to view the seven Contacts. Stop on Don Wallenstein's record. There is an event dated 5/24/04 to send a follow up letter to Don Wallenstein. Suppose you want to call him a week before the follow up letter. Use the down arrow, to the left of the Events,

to move the 1st Event to the 2nd Event. Now type in 061804 in the 1st Event date (slashes are entered for you), press the Tab key on your keyboard, then type Make a follow up call.

## R E P O R T S

The Windows menu contains a Report Forms submenu that lists the different printable reports and forms specific to the Contacts file. Choose any of the report forms to open the form window. Now choose Print from the file menu.

Notice the Custom Forms in the Report Form submenu. Choose Custom Forms from the Windows menu, Report Forms submenu. Notice that one Custom Form already listed. You can create an unlimited number of Custom forms or Custom Labels here. But since this tour doesn't cover creating new forms, Click the Cancel button.

Notice the Export, also in the Report Form submenu. You might be wondering if you can export to your favorite PDA or vCard software. You can! InView comes with a utility file named Contacts Utility that has easy-to-use custom exports and preset exports for PIM devices. The preset exports are also easily changed and saved to your specifications.

## T H E T R A N S F E R B U T T O N S

The Contacts file can initiate all sorts of other activities regarding a Contact. It can start a new estimate, invoice, submission or letter. Or it can start a timer tracking the time you spend on particular tasks or enter an appointment.

If you're not in the window titled Contacts:Data Record choose Data Record from the Views popup menu in the upper right corner of the window. If you're in a Contacts window that doesn't have a Views popup menu, you'll find Data Record in the Windows menu at the top of the screen.

There are four transfer buttons located to the right of the phone numbers. Their names are: Transactions, Correspondence, Task Timer and Date Keeper. Using any of the four transfer buttons or menus creates a new entry in the designated file for the currently displayed Contact. The Transfer menu, located in your menu bar across the top of your monitor, also performs these actions. The buttons give you more specific choices though as well as the ability to select all existing reports of a kind for this contact.

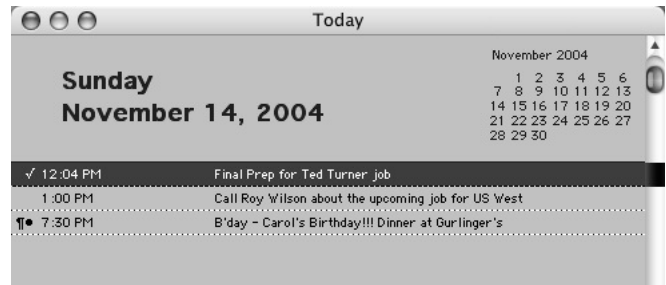
Click on the Date Keeper button in the Contacts:Data Record window and choose New Entry. Proceed to the Date Keeper chapter now.



# D A T E   K E E P E R

Date Keeper is the file that tracks your appointments and maintains prioritized lists of things to do.

Date Keeper can be opened by double clicking on the Date Keeper file in the InView & StockView demo folder or by clicking on the Date Keeper button in the Flow Chart. When opened from the Contacts file, as described at the end of the Contacts chapter, it not only opens, but it also adds a new entry for the named Contact.



If you got to the Date Keeper by clicking on the Date Keeper button in the Contacts file, you're in the Date Keeper:Item window. At this point you'd fill out the rest of the specifics about the item you're entering for this contact. We'll get back to this window in a moment. Click on the Done button to go back to Date Keeper:Day window.

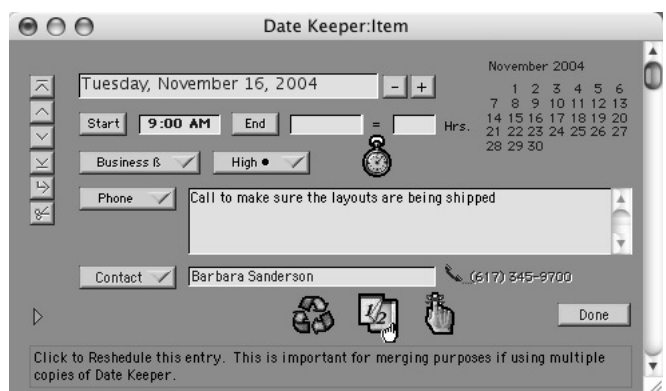
The Date Keeper:Day view shows a list of the items scheduled for one day at a time. The date of the displayed day is shown at the top of the window. Click and hold anywhere near the date display at the top of the window to get a hidden popup menu to appear. This popup triggers many of the more typical functions in the Date Keeper. Choose Show To Do's from the popup menu. A list of additional items appears below the scheduled items. These are things that need to be done, but not necessarily on a particular date. They remain active To Do's until they get checked off as done.

Click once on the line that says Write a Thank You to Jenny Patterson. Now click near the date at the top of the window to activate the popup menu again. Choose To Do Is Done from the menu. A checkmark appears on the line and the Thank You is marked as done. It will now stay with this date and no longer show up as something to be done, but you can always look back to see when you did it.

In the Windows menu at the top of your monitor, choose Week View. All of the week's activities are now displayed. On the line that starts with the words "Set up -" click and hold on those words. A display pops up to show you more information about the entry.

Double click on the line below that is marked as a Job. This opens the Item window in which you can view, modify or enter information about any one entry in Date Keeper.

Let's try out some of the flexible date and time entries. Type Cmd/Ctrl-E to make a new entry. In a new entry the Date is already highlighted so that you can make immediate changes. Type next fri and press the Enter key. The Date can also handle entries like 1/21/05, 8/14, oct 21, today, tomorrow, yesterday, last wed and tue. Or, using t to represent today, you can include numerals to indicate the number of days before or after today. T1 is tomorrow, t14 is in two weeks and t-30 is a month ago.



Times are easy to enter too. Click into the cell for Start Time and type 7 and press the Tab key. 7:00 AM is entered and the cursor goes to the End Time. 7p would have resulted in 7:00 PM. Type now and press the Enter key. The current time is entered. If you entered 915 as the End Time, it would result in 9:15 AM, but 615 would get 6:15 PM since the program knows an ending comes after the beginning.

Click on the small month display in the upper right corner of the window. A large full month display opens. Click on the zoom box in the upper right corner of the window. The window resizes to fit your monitor and all the days enlarge. Hold down the Opt/Alt key and click on a day with multiple entries. A display opens to show that day's entries. Click anywhere in the new window to make it close.

Click on the tiny 3 month icon. A small three month calendar appears. Hold the Shift key and click on any of these months. The calendar switches its orientation. You can use either and position it for convenience on your monitor. Close the 3 month calendar by clicking in its close box.

# T A S K T I M E R

Task Timer is a sophisticated phone dialer and timer. It can be used to time phone calls or other tasks and calculate any associated charges. The charges can be added to a job or invoice or simply saved for verification of your phone bill. Notations can also be added to the Contact's record.

Go back to the Contacts:Data Record by either clicking on the window, if you can see it, or type Cmd/Ctrl-H to open the Flow Chart and click the Contacts button. Find Carol McDaniel using any one of the search tools we showed you earlier, such as the Cmd/Ctrl-I. Then click the Task Timer button. A new entry is made in the Task Timer for Carol McDaniel.

Depress the mouse on the Task popup menu button and choose Other.... Type Thinking into the dialog window that opens and press OK. Click on the popup again and notice that Thinking is now one of your choices. Many of the popups in InView & StockView automatically add new items in this manner.

Click the Billable check box. Click the hour glass icon and the Start Time is entered for you. We want to bill Carol for an hour of research but you probably don't want to wait an hour before clicking the hour glass for the End Time. Click in the Start Time and highlight the hour only. Change the hour to one less than what it is. Now click the hour glass icon again to enter the End Time. Click in the Billing Rate cell and enter 90. Now click the Hour check box. Notice that the Charges are now calculated for you.

Task Timer:Entry

01/14/04 Thinking  Billable

Contact Carol McDaniel

Company Bolton Hotels

Phone 1 (202) 523-2002 Work

Start Time 9:47:14 AM

End Time 10:53:11 AM

Elapsed Time 1:05:57

Billing Rate 90.00 per  Hour  Minute

Charges 99.00

Notes Thinking about brochure; got lots of great ideas;

Add to Job

Current Area Code is...()

Click to add a memo to the Phone Calls in the contact's record in the Contacts file. If you enter a semi-colon, ;, to the memo, any text preceding it is automatically selected as the Memo text.

Click into the notes cell and type Thinking about brochure; got lots of great ideas.

In the Notes cell the semi-colon (;) is very important if you want a notation made to Carol McDaniel's contact record. Only the text or note entered before the semi-colon is transferred to her contact record. Any text entered after the semi-colon is additional notes remaining in the Task Timer for reference.

Depress the mouse on the Add To Job popup menu button. Choose Link Open Jobs to open and link the Open Jobs file. Click again on the Add To Job popup and choose 96053 - Bolton Hotels. The charge is added to the Open Job #96053.

Click on the Pencil icon, or from the Task Timer Functions menu choose Memo to Contacts. The Task Timer enters your note to the Phone Calls notes located in Carol's contact data record.

Close Task Timer by choosing Close File in the File menu or by typing Cmd/Ctrl-W.



# C O R R E S P O N D E N C E

Correspondence creates and stores letters, faxes and e-mail to Contacts. You can create a single correspondence or email message or a mass mailing or emailing.

Correspondence can be opened by double clicking on the Correspondence file in the InView & StockView Demo folder or by clicking on the Correspondence button in the Flow Chart. When opened from the Contacts file, as described below, it not only opens, but it also creates a new entry.

For the sake of the demo we want to start in the Contacts file. Open the Contacts file. Locate Sean Fogarti using your choice of selection routines. (You have the String Search, Phonetic Search, or Select a Contact from the Search menu). Now depress the mouse on the Correspondence popup button located on the Data Record. Release the mouse on New Letter.. A new letter is started in the Correspondence file.

Correspondence: Setup

Date: Tuesday, October 31, 2006

LETTER FAX  E-MAIL

Contact: Sean Fogarti

Company: Grannis Group of Mutual Funds

Email: fogarti@earthlink.net

Form Letter Used: License Reminder

Subject: License is Expiring

Greeting: Hi Sean

Closing: Regards Joe Saputo Studio Manager

Tuesday, October 31st, 2006

Sean Fogarti  
Grannis Group of Mutual Funds  
900 Fillmore, Suite 200  
Crescent City, CO 85049

Reference Text Only - Check the actual line wraps in the Letter or FAX form to be used.

Viewing 1 of 90 Selected Records from 90 Total in the File

Click to open a Letter form from which the letter is actually printed if this is a letter, or a Fax form if this is a Fax.

There are actually several ways to create a new letter.

Among them, in Correspondence, choose New Letter from the Functions menu (Cmd/Ctrl-E), then type in a Contact name. Clairvoyance will finish the name for you when it finds a match. Various pieces of information are automatically transferred to the Correspondence record.

For the demo, let's continue with the letter to Sean Fogarti. Your letter can be written or modified in this window, but let's move to another window. Click on the Letter icon. (The Letter icon is the graphic representation of an actual letter, located on the right-center of the Setup window.)

You are now viewing a window named Correspondence:Letterhead 1. Click once below the ruler. Carefully select and highlight (click and drag) the wording that states "Replace this paragraph with the BODY of your letter. Text above and below this paragraph uses the Formula Merge Style to merge this letter's Contact information into this letter." You don't want to mess with these formulas in the demo. The formulas add immense potential to what the Correspondence file can do, but they are an advanced feature that we won't deal with in the demo.

With the text highlighted, type anything that you care to for the sake of the demo. Now choose Print or Preview from the File menu.

```
!datepattern(@Date,"Day Of Week, Month ddhh, yyyy")
!replace(@Contact;@Company;@Address;@City;@State;" * @Zip Code");!@!@
!greeting; @Substitution;
Replace this paragraph with the BODY of your letter. Text above and below this paragraph uses the Formula Merge Style to merge this letter's Contact information into this letter.
!closing;
!author;
!title;
```

In the Correspondence file you can create a simple one-time or one-time email (Save As Email) letter like we just did, or a form letter to be mailed to a selected group of Contacts. In addition you can create a completed mail merge using formulas to control the text of the letter based upon certain criteria in each Contact's record. Building formula merges within the body of a letter is beyond the scope of this demo, but just know that you can become the next Publishers Clearing House.

## F O R M L E T T E R S

Instead of writing a letter to the Contact, you can use a pre-written letter; a Form Letter. You can create and save form letters. A form letter is a complete letter or any part of a letter that exists ahead of time and is ready to use repeatedly, at a moments notice. A form letter may be as simple as a saved style along with specific font and margin settings; a template.

Another type of form letter might contain lots of words for a particular situation. This sort of form letter may serve as a cover letter for job deliveries, a letter of introduction, or a follow-up letter. When the need arises, select the appropriate form letter, make major, minor, or no modifications, and print.

Let's take a look at some examples of Form letters.

In the Correspondence file, you should be viewing the window named Correspondence:Setup.

From any other Correspondence window you can get to it by choosing Setup from the Windows menu.

Above the Letter icon is a popup menu for Form Letter Used:. Click and hold on this popup menu to see a list of the available Form Letters. Scroll down the menu to pick one. This places the form letter in the Setup window where you can click the Letter button and modify the letter if necessary. Notice that the letter in the window updates with the Contact's name and such in place.

## E M A I L

Any letter can be printed, faxed or emailed. There are four email options, Send Email, Email Selected Contacts, Email-CC Selected Contacts and Email-BCC Selected Contacts. Each transfers a copy of the letter to a new email in your preferred email software using either the single email or the email address of several people selected in the Contacts. file.

Email to Selected Contacts provides a bulk emailing function, sending a personalized email message to each of the selected Contacts.

## E Z G R A P H I C S

Now for some fun. You can quickly build a letterhead in a number of InView & StockView reports. In the Correspondence:Letterhead 1 window, click on the Company Info menu and choose All Company Info. Click on the menu again and choose On. The name and address entered in the Flow Chart's Company Profile appear plus a logo. The logo comes from any JPEG, TIFF or PICT file named Logo that is present in the InView & StockView folder. The elements can be modified, moved or turned on and off collectively or independently using the Company Info menu. Once they're configured as you want them, the whole set can be turned on or off at a moment's notice. They'll return to your new configuration whenever you turn them on again.

If your Logo is smaller or larger, use the Margins menu Top margin to move you letter text up or down.

Highlight all or part of your letter and use the Text Menu Paragraph Settings for left and right margins, or use the Text Menu Styles to adjust the style of the highlighted text.

Close Correspondence by choosing Close File in the File menu or by typing Cmd/Ctrl-W.



# E X P E N S E L O G

The Expense Log file helps you keep track of out-of-pocket expenses incurred during a job or trip. It handles several Jobs and/or trips at the same time. Entries in the Expense Log can be automatically added to an Open Job. Unless you tend to take your desktop Mac on the road with you, Expense Log's greatest appeal is to the PowerBook user in a hotel room with a pocket full of receipts.

The Entries window is a printable window with several popup menus. The first and largest of these menus selects and identifies sets of Job/Trip entries. The name changes according to the current status of the Expense Log file. When the demo copy opens it says All Jobs indicating that all jobs are selected. Each Job or Trip needs an identifying name to track what goes with what.



The screenshot shows a window titled "Expense Log: Entries". At the top, it says "All Jobs" and "Balance: \$2,019.12". Below this is a table with columns: Date, Item, Account, Paid By, and Amount. The table contains several rows of expense entries, including Skycap Tip, Bellman Tip, Taxi, and Airport Parking, with their respective amounts and payment methods.

Date	Item	Account	Paid By	Amount
05/11/04	Skycap Tip	Reimbursement Travel	Cash	10.00
	Notes/Receipt#	DIA		✓
05/11/04	Skycap Tip	Reimbursement Travel	Cash	10.00
	Notes/Receipt#			✓
05/11/04	Taxi	Reimbursement Travel	Cash	37.00
	Notes/Receipt#	Airport to Hotel		✓
05/11/04	Bellman Tip	Reimbursement Travel	Cash	15.00
	Notes/Receipt#			✓
05/15/04	Bellman Tip	Reimbursement Travel	Cash	15.00
	Notes/Receipt#			✓
05/15/04	Skycap Tip	Reimbursement Travel	Cash	10.00
	Notes/Receipt#			✓
05/15/04	Skycap Tip	Reimbursement Travel	Cash	10.00
	Notes/Receipt#			✓
05/15/04	Airport Parking	Reimbursement Travel	Cash	45.00
	Notes/Receipt#			✓
04/30/04	Taxi to Airport	Reimbursement Travel	Cash	32.00
	Notes/Receipt#			✓

After you name a Job/Trip, that name appears in the Job/Trip popup menu along with any others in the file. To select the records for a Job/Trip, choose it's name from the menu. Click on the Job/Trip popup menu and select US West. The menu's title changes and the Balance is updated to show the current standing of the US West job.

Each record in the Expense Log has six cells to enter information about each expense entry. Date is for the date the expense was incurred. Type a date directly into the Date cell or use the Date popup menu to enter dates for Today, Yesterday, 2 Days Ago or n Days Ago. If you choose n Days Ago, a dialog opens where you enter how many days back to date the entry. The Date menu is headed by Sort Dates. This selection puts all entries in the field in chronological order.

Item is a description of what the entry represents, something like Tip, Taxi Fare, Lunch with Suzanne, Hotel or whatever. The Item popup menu lists all entries that have made in this field. Choose one from the Item popup menu to enter that in the Item cell of the record you're working on. Avoid redundant typing.

Account labels the kind of expense as identified by your Chart of Accounts. The Account popup menu lists all your accounts. Find the account in the Account popup menu that fits the entry you're making. The right choice is usually pretty simple.

The purpose here is to provide a simple record of Expenses, to keep you organized and to provide reports that you or your bookkeeper can use later. If you're double entry accounting savvy, you know that the entries in this file go into your books as Expenses and, if they're billed back to your client as part of a job, they're Income. Income Accounts appear above the divider line in the Account popup menu. If the entry is headed for an Invoice (to be billed back to your client) it's an Income Account.

The Expense Log can add Income entries to a Job or Invoice, but refuses if they're not marked as Income Accounts. The simple rule is: If it's a job related, reimbursable expense destined to appear on an Invoice, it's Income. Expense Accounts are listed below the divider line in the Accounts menu. If your client isn't going to pay you back, it's an Expense.

Did you pay cash? Or use your credit card? Paid by is the place to make note of that. The Paid By menu lists a preset number of choices. Initially it lists Petty Cash and Credit Card, but the menu can be customized. Click on the Paid By menu and make a choice.

Amount is where you enter dollars and cents for the expense. Type an amount into the cell. Notice that the Balance at the top of the window updates to include the new amount.

Notes/Receipt# is the place to enter anything you want to about the entry; put in the receipt number, whatever. The cell can hold much more than it can show. When you print the Entries window or a Report By... the Notes expand to print all of its contents.

The Functions menu has four reports available. Report By Payment separates entries by the method of payment and within each payment type shows subtotals by Account. This is the one your bookkeeper may prefer. Choose Report By Payment and examine the Preview.

# T H E O R I Z E R

Theorizer lets you play the numbers, legally. Calculate how many days you need to work at a given rate to earn a particular amount in a year. Enter numbers into any of the cells, all the other cells recalculate. If you enter, say, your annual overhead, you soon see what that means each week or month.

In the upper portion of the window, enter the number of days that, given your druthers, you'd work each year, month or week. When you make an entry into any one of these three, InView figures out the others. Right below them, enter a typical day's fees for Average Daily Fee. Tweak the numbers. Notice what a difference \$20 a day can make in the Resulting Annual Gross Income.

Theorizer:Fee Calculator

Scenario

If You Bill for an Average of: 156.4 Days per Year  
13.0 Days per Month  
3.0 Days per Week

With an Average Daily Fee of: 1,000.00

Your Resulting Annual Gross Income will be: \$156,400.00

With a Fixed Overhead of: 26,070.00 per Year  
Factor Overhead 2,165.00 per Month  
500.00 per Week

Your Resulting Annual Net Income will be: 130,330.00

Less Taxes of: 21 % or 27,369.30

Less Your Annual Salary of: 50,000.00

Leaves Your Business with an Annual Profit of: \$52,960.70

If you know your overhead, enter it, per year, month or week. (This figure is probably available on your income tax forms) The Resulting Annual Net Income is now displayed. If you don't like that number, change it to what you want to earn per year. Now you see how much you need to charge per day to make that, or how many days you need to work.

On the line for taxes, enter either the percentage rate at which your business is taxed or the actual amount per year. Here, too, InView fills in what you don't.

And last, but certainly not least, enter the amount of annual salary you want to pay yourself. InView now shows your business' annual profit. Is it enough to grow on?

If you don't know your overhead costs and can't find it in your tax forms, click on the Factor Overhead button and the window changes to a window named Overhead. The Overhead window adds up to 20 expense items to factor your overhead on a weekly, monthly or annual basis.

Start by selecting the period to be used. Click on the Overhead Factored: popup menu and select one of the three periods. The period can be changed at any time. Proceed to make entries into the cells. The first of each pair is for a description of the item. The second is for the amount.

The Accounts popup menu lists expense accounts entered in the Chart of Accounts. Choose one and it's added to your entries in the Overhead window. As you enter amounts, the annual, monthly and weekly overhead is added and displayed in the bottom of the window.

When you want to clear the decks and start with a clean slate, Clear Data does the job. All cells in the window are emptied.

The Fee Calculator button returns you to the Fee Calculator window. Numbers you entered into the Overhead cell are replaced by the numbers from the Overhead window.

When planning or theorizing your financial future, it may not be enough to paint one picture and let it go at that. More often you want to consider one possibility, then another without losing your previous thoughts. What if this, or what if that? Scenarios allow you to create many possible financial pictures. The Scenario popup menu lets you Name, Rename or Delete scenarios. As you create a scenario, its name is listed in the menu. Choose one to bring its numbers into the window.



# C H A R T   O F   A C C O U N T S

Chart of Accounts is a critical part of InView. It is the file that provides accounts and account codes to Worksheet, Stocksheet, Checkbook, Payables, Receivables and the General Ledger for financial reporting. Theorizer and Expense Log also use information from Chart of Accounts.

Accounting makes most heads spin, but for the sake of accuracy, every monetary transaction needs an account. If you set up and use your accounts carefully, HindSight's reports help you understand your financial activity in a simple way. Good accounting is not a simple matter and everyone's needs are different. Wouldn't it be nice to just ignore it? But to succeed in business, accounting is as important as your pulse. We've tried to make complex tasks simple and still produce useful and valuable information.

InView is not intended to serve as a replacement for your accountant, nor can we offer accounting advice. There is no substitute for the guidance of a professional accountant.

To help you get started, InView ships with usable sample codes for reference or use as-is or after modification. The Functions menu also has the ability to install account codes for you to help in minimizing the startup time. Build from these sets or install your own.

It's your choice how detailed your Chart of Accounts is. If you want reports to show how much you spent on staples versus paper clips, go for it: give them each their own account. Or be cavalier and put everything you buy under one account for the cost of doing business. Hopefully there's a happy medium in there for you. If you're unsure, call your accountant. It is definitely worthwhile.

The Chart of Accounts file has only one window with three fields.

The Account Code field holds the number you assign to an account. Codes that appear in the Code field of the Checkbook, Payables, Worksheet, Stocksheet and the General Ledger files must agree with the Account Code in your Chart of Accounts file. As a safety measure most of these files have popup menus and other entry aids to install Account Codes. Both Worksheet and Stocksheet refuse to post UNcoded items to the Receivables file.

Account Name is the label used in reports to identify each account so you don't have a long list of unidentified account numbers followed by dollar amounts.

The Type field specifies the kind of account an entry in the Chart of Accounts is. Which types you enter depends on how much of InView's financial record keeping you want to use. You may find your use increases over a period of time and you can continue to build your Chart of Accounts as you take advantage of additional InView features.

Although there are always exceptions, some accounts are required by specific files. You must have certain account types entered for various files you use. If you're not using some of the financial record keeping files, you can ignore the accounts that they require.

Worksheet, Stocksheet and Receivables require Income accounts. Checkbook and Payables require Expense accounts. The General Ledger needs Current Asset, Equipment Fixed Asset, Fixed Asset, Liability, Capital, Income and Expense accounts.

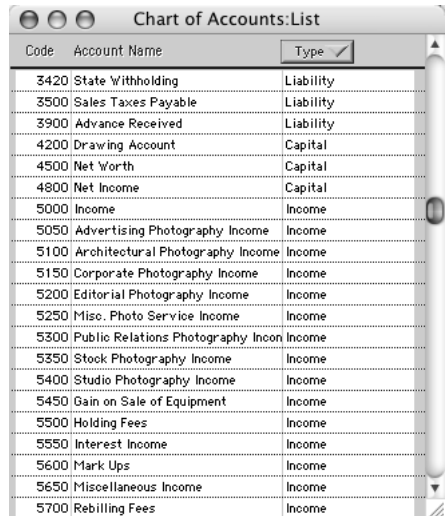
Current Asset accounts are Debit Balance Accounts, cash and other assets that are consumed in a relatively short period of time in the normal operation of business Checking, Savings, and Accounts Receivable are examples. Only the General Ledger requires Current Assets.

Equipment Fixed Asset accounts (entered as Equip Fixed Assets) is for Equipment you own that will have a Debit balance. Depreciation taken on equipment has a Credit balance. Only the General Ledger requires Equipment Fixed Assets.

Fixed Asset accounts are Debit Balance Accounts whose benefits extend over longer periods, such as buildings, stocks and bonds, and long-term investments or deposits. Only the General Ledger requires Fixed Assets.

Liability accounts are Credit Balance Accounts indicating obligations or money you owe. Accounts Payable, Commercial Loan, and Taxes Payable are some examples. Only the General Ledger requires Liabilities.

Capital accounts are Credit Balance Accounts indicating the value of your company. A credit bal-



Code	Account Name	Type
3420	State Withholding	Liability
3500	Sales Taxes Payable	Liability
3900	Advance Received	Liability
4200	Drawing Account	Capital
4500	Net Worth	Capital
4800	Net Income	Capital
5000	Income	Income
5050	Advertising Photography Income	Income
5100	Architectural Photography Income	Income
5150	Corporate Photography Income	Income
5200	Editorial Photography Income	Income
5250	Misc. Photo Service Income	Income
5300	Public Relations Photography Income	Income
5350	Stock Photography Income	Income
5400	Studio Photography Income	Income
5450	Gain on Sale of Equipment	Income
5500	Holding Fees	Income
5550	Interest Income	Income
5600	Mark Ups	Income
5650	Miscellaneous Income	Income
5700	Rebiling Fees	Income

ance means your Assets out weigh your Liabilities. THAT'S GOOD! Only the General Ledger requires Capital.

Income accounts are Credit Balance Accounts which summarize money earned or collected for fees for services, usage, or reimbursements. Services rendered, expense reimbursements or interest income are some examples. Worksheet, Stocksheets, Receivables and the General Ledger require Income accounts.

Expense accounts are Debit Balance Accounts which summarize how you spend money. Auto, operating and production expense categories are examples. Checkbook, Payables and the General Ledger require Expense accounts.

## I N C O M E O R E X P E N S E ?

Although they're often referred to as expenses, reimbursable expenses you bill in Worksheet are actually income in your books and should be listed in Chart of Accounts as Income. You know, the client sends you a check for your fees plus expenses. At that point the whole check is income adjusted elsewhere by the check you wrote to pay for those expenses.

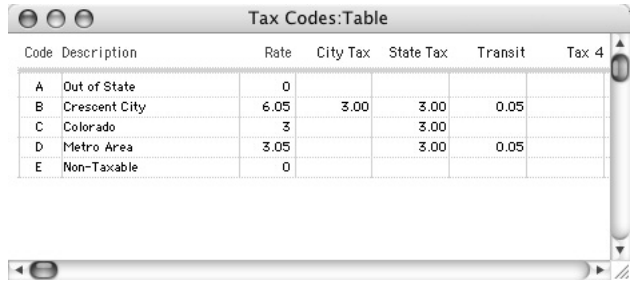
These reimbursable expenses are items such as film, processing, airfare, printing and such. The Account Name for this Income can be something like Film Expense Reimbursement, Processing Expense Reimbursement, Travel Expense Reimbursement and Printing Expense Reimbursement. The same items could be put into broader coverage such as Film and Processing Reimbursement or even just Reimbursable Expenses.

Each of these Reimbursable Expense/Income accounts needs an Expense account to be used when you actually incur or pay the debt. To use the same examples as above, you can have perfectly matching Expense accounts named Film Expense, Processing Expense, Airfare Expense and Printing Expense. Or they can be broader names like Film and Processing Expense and Travel Expense or even Job Expenses.



# T A X C O D E S

The Tax Codes file only comes into play if you're in an area, such as California, where you have to file Sales Tax reports for a number of government entities. The Tax Codes file helps you to identify these entities and their rates. Corresponding alpha characters are entered in the Contact records to indicate how each client is to be taxed. The Sales Tax reports are generated from the Receivables file.



Code	Description	Rate	City Tax	State Tax	Transit	Tax 4
A	Out of State	0				
B	Crescent City	6.05	3.00	3.00	0.05	
C	Colorado	3		3.00		
D	Metro Area	3.05		3.00	0.05	
E	Non-Taxable	0				

Once set up, you would seldom work in the Tax Codes file.

It's hard to remember what represents what based on names like Tax 1 and Tax 2. The names of these five fields can be changed to whatever works best for you.

To rename a field, click on the blue-colored field name or click in any one of these five fields and choose Customize Field Name in the Functions menu. A dialog opens with the field's current name. Enter the name you want and click OK. It's done. Since most kids are pretty adept with a computer, this one is so easy even an adult can do it.

If you have four or less tax entities you can enter their names here. Names like Meadville, Crawford, Pennsylvania for your city, county and state are fine. If you're in a place like California with many tax entities, you're better off with more generalized names such as City, County and California. Within a field you can enter different rates on every line, if necessary, so long as it's the right rate for the Description on the same record.

If you need more than a single decimal place, such as 3.76%, hold the Opt/Alt key and click on the blue-colored field name. Enter the number of place holders you need; 1, 2 or 3.

# E S T I M A T E S & O P E N J O B S

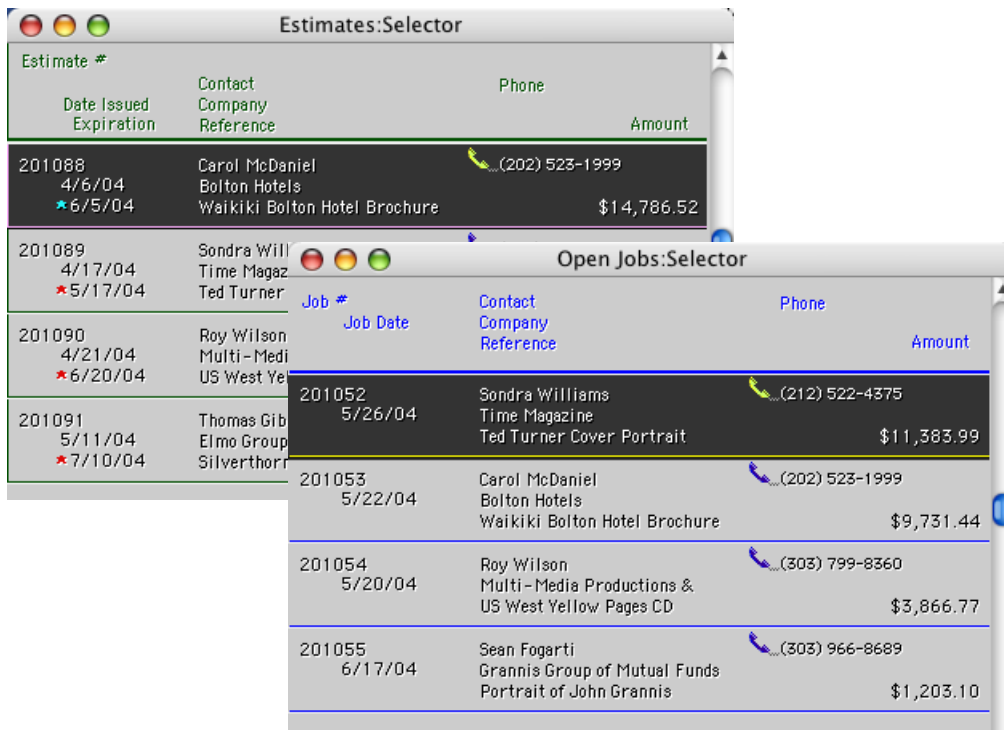
These two files are identical except for their contents. The Estimates file stores estimates and the Open Jobs file stores work in progress. Creation and modification of estimates and open jobs is always done in Worksheet. These files are simply storage and reference areas.

When you open either file you see a list of its contents. Double click on any Estimate or Job in the list. The window changes to show the details of the selected report. It can be printed, but not modified here. To make changes the report must be moved back to Worksheet, modified and then re-filed or, as we call it, posted.

Reports are retrieved into Worksheet by highlighting the desired report then choosing Transfer to Worksheet in the Functions menu.

The Estimates and the Open Jobs file hold reports put together in Worksheet, and neither lets you directly enter or change data. Open Jobs is a developing record of actual costs for the job. Open Jobs accepts entries from the Task Timer file, Payables and the Checkbook, each of which has an Add To Job feature so you can automatically post expenses or time spent on a task to an Open Job.

Reports remain in these files until you delete them. Retaining them has benefits by maintaining a record of what you estimated versus what you charged. Worksheet can also provide budget checks, comparing the charges being incurred during a job to the estimated expenses.



# W O R K S H E E T

The Worksheet file is a report generator. Worksheet is where you assemble and modify Estimates, Confirmation, Open Jobs, Invoices and their correlated printed reports. Worksheet works a little differently than other files, in that its purpose is not so much for storing information as it is to process it.

For the purpose of our demo, open Worksheet by clicking on the Worksheet button in Flow Chart. Worksheet can also be opened by double clicking on the Worksheet file in the InView & StockView Demo folder.

When opened from the Contacts file using the Transactions popup menu, Worksheet not only opens, but it opens and a new report is created. If the program detects a report is already in Worksheet and possibly not posted (filed away), this access to Worksheet asks permission to overwrite it before proceeding.

Worksheet draws information from other related files in order to prepare and print or email reports using customized or standard forms. Once the report is calculated and printed to your satisfaction, the report is posted to its respective file. An Estimate is posted and stored in the Estimates file. A Confirmation or an Open Job report is posted and stored in the Open Jobs file. If you prepared an Invoice, the Invoice is posted and stored in the Receivables file.

Let's first look at an existing report in the Worksheet and its various parts.

## REPORT HEADER

Worksheet always starts by opening the Report Header window. If you're in the Worksheet file but the window you're viewing is not named Worksheet:Report Header, press Cmd/Ctrl-2.

Note: If the window does not show an Estimate for Carol McDaniel of Bolton Hotels, click on the File menu and choose Revert to Saved. Click OK in the dialog window that appears. This will reload our demo Estimate and help you follow along.

The Report Header shows the report Status, an Estimate, in this case. The word Estimate shows on the Status popup menu. Depress the mouse on the Status popup menu to see the various Status choices. Don't change the Status, simply slide the mouse off the popup menu before releasing it.

To the right of the Status is the Print As popup menu. Worksheet offers a choice of Itemized or Summarized reports. An Itemized report lists each and every item, while a Summarized report organizes the items into pre-defined groups and hides the details.

Click on the Print As popup menu in the top right corner to see the options available.

To the left of the Contact name is another popup menu named Contact. Take a look at the Contacts popup menu choices. You can open the Contacts file, open the Contacts file and locate the contact whose name is in the Report Header, create a letter to the contact whose name is in the Report Header, or open the Contacts file and search for a different contact name.

The Contact company, address, etc. is filled in automatically whenever you create a new report. If a Billing Address has been entered in the Contacts file, that is used in lieu of their primary address.

Remarks, the large cell located at the bottom of the Report Header window, is a multi-function text box. You can enter whatever you like to describe the job and the terms under which it's being done. Or you can click the Terminology button to open the Terminology file, a scrapbook of sorts, where you can create, revise and store licensing and contractual language. The Terminology file has a popup menu, Enter Terms in..., which enters your terms into the Remarks cell of the Report Header.

Below the Print As popup is a series of buttons and cells. We'll use these buttons later when we create a report. You can type directly into the cells or use the buttons to enter dates and automatically assign numbers to Estimates, Jobs and Invoices.

Once the Report Header is completed, typical report preparation then proceeds to entry of the billing items that will make up the estimate, job or invoice. There are two ways of doing this

The screenshot shows the 'Worksheet:Report Header' window. At the top, there are two dropdown menus: 'Estimate' (selected) and 'Print as:' (selected 'Itemized'). Below these are several input fields and buttons. On the left, a 'Contact' dropdown menu is set to 'Carol McDaniel'. To its right, fields for 'Telephone' (523-2002), 'Email' (cmcdaniel@boltonhotels.com), 'Send to:' (Carol McDaniel), 'Company' (Bolton Hotels), and 'Address' (900 Jefferson Dr.) are visible. Further right, there are fields for 'Report Date' (12/06/04), 'Estimate #' (201088), 'Job #', 'Invoice #', 'Start Date' (01/03/05), 'PO #', and 'Terms' (60 days). A 'Worksheet' button is located below the 'Terms' field. At the bottom left, there are fields for 'City, ST Zip' (Washington DC 20560), 'Country' (USA), 'Source' (Word Of Mouth), 'Tax Exempt #' (blank), 'Tax Code' (A), and 'Tax Rate' (6.7). Below these are fields for 'Reference' (Waikiki Bolton Hotel Brochure) and 'Terminology'. A large 'Remarks and/or Terms' text area is at the bottom, containing a disclaimer about the use of promotional brochures. On the far right, the word 'ESTIMATE' is written vertically in large letters.

depending on personal preferences. The Worksheet and Line Entries buttons, located in the lower right corner of the Worksheet:Report Header window, provide access to the windows used for making these entries.

Click on the Worksheet button. The Worksheet button takes you to the Worksheet window where you can see and work with every bit of data in the Worksheet file.

QTY	Item	Cost	Summary Group	Code	%Up	UnitPrice	Price	Taxable	Tax:Rate
0							0.00		6.7
							<b>0.00</b>		
0	Creative Fees	6,000.00	10 Creative Fees	5250		6,000.00	6,000.00		
			<b>10 Creative Fees</b>				<b>6,000.00</b>		
0	Pre-Production	3,000.00	13 Production Services	5250		3,000.00	3,000.00		
			<b>13 Production Services</b>				<b>3,000.00</b>		
			<b>Fees</b>				<b>9,000.00</b>		
0	Assistant's Services	1,000.00	23 Assistants and Stylists	6280	10	1,100.00	1,100.00		
0	Second Assistants	600.00	23 Assistants and Stylists	6280	10	660.00	660.00		
			<b>23 Assistants and Stylists</b>				<b>1,760.00</b>		
0	Computer Enhancement	1,000.00	25 Computer Enhancement	6280	10	1,100.00	1,100.00		
			<b>25 Computer Enhancement</b>				<b>1,100.00</b>		
60	EPX 135-36	9.05	30 Film and Polaroids	6490	20	10.86	651.60	Yes	6.7
60	TYPE 669 Color Polaroid	1.50	30 Film and Polaroids	6490	150	3.75	225.00	Yes	6.7
			<b>30 Film and Polaroids</b>				<b>876.60</b>		
6	PMT/Stat	5.00	34 Scans & Stats	6545	25	6.25	37.50	Yes	6.7
6	Scans	8.00	34 Scans & Stats	6545	25	10.00	60.00	Yes	6.7
			<b>34 Scans &amp; Stats</b>				<b>97.50</b>		
60	E-6 120 Processing	4.10	35 Photo Lab Services	6540	25	5.12	307.20	Yes	6.7
6	Clip Test	3.75	35 Photo Lab Services	6540	30	4.88	29.28	Yes	6.7
			<b>35 Photo Lab Services</b>				<b>336.48</b>		
0	Telephone	50.00	45 Miscellaneous Expenses	6840		50.00	50.00		
			<b>45 Miscellaneous Expenses</b>				<b>50.00</b>		
0	Shipping	50.00	60 Shipping	6680		50.00	50.00		
			<b>60 Shipping</b>				<b>50.00</b>		
0	Lodging	0.00	80 Travel Expenses	6850	0		0.00		
0	Meals	0.00	80 Travel Expenses	6850	0		0.00		
0	Round Trip Airfare for 2	1,516.00	80 Travel Expenses	6850	0	1,516.00	1,516.00		
			<b>80 Travel Expenses</b>				<b>1,516.00</b>		
			<b>Expenses</b>				<b>5,786.58</b>		
							<b>14,786.58</b>		6.7

Tip: Don't let the examples using Film and Processing fool you. Worksheet's fully capable of handling digital terms just as readily.

This Estimate contains bold lines in the Worksheet window. The bold lines are totals and subtotals of fees, services and materials. When you see bold lines this means the Worksheet has been calculated. Notice that some lines contain a zero (0) quantity at the far left while others contain numbers. A zero quantity is treated as a quantity of one (1), but zeros do not print on the printed report. This avoids printouts showing 1 Creative Fee or 1 Pre-Production.

The lines with quantities entered in the QTY column will print in Itemized reports. The bold lines will print in Summarized reports using the wording that appears in the Summary Group column. The numerals preceding the words in the Summary Groups do not print. They're used to control the order in which the groups are printed.

On any given line, the columns contain information about each Item and its pricing. QTY is how many Items the line represents. Item is the basic description of whatever the entry is for. Cost is how much you pay for the Item or your basic fee. Summary Group is the group that this entry is a part of when printed as a Summarized Report. Code is the account code used for accounting and financial reporting purposes. %Up is the amount of mark up to be applied to the Cost. Unit Price is the Cost plus markup; the amount to be charged per Item. Price is the Unit Price times the QTY; the line total.

The Taxable column holds a Yes for Items that should be taxed IF the customer is taxable. The Tax Rate and Tax columns are filled in by the program when it has a taxable customer and it encounters Items marked Yes in the Taxable column. The Tax Rate is determined by the Rate or Tax Code entered in each contact's record in the Contacts file.

The rest of the columns stretching off to the right are used by the program or are accessed in other windows.

Choose Print Report from the Functions menu, or type Cmd/Ctrl-5. If the settings in the Report Header window are still set at Estimate and Print As Itemized the program will Preview an Itemized Estimate for you. Note: If the preview is too small to see well, click on the Magnifying Glass on the tool palette at the left side of the window. Notice that while some lines show quantities, the zero (0) quantities are suppressed.

Close the Preview window, then click in the close box (top left corner of the window) to close the Worksheet:Estimate window. Type Cmd/Ctrl-2. The Worksheet:Report Header opens. Click on the Print As popup menu and choose Summarized. Now choose Print Report from the Functions menu, or type Cmd/Ctrl-5. This time the Preview shows the Summarized format of the same Estimate. Notice that no quantities are displayed now and that the individual line items have been grouped. For instance, lodging, meals and airfare have been grouped as Travel Expenses.

Close the Preview window. You should now be viewing a window titled Worksheet:Summarized Estimate. Click on the Company Info menu and choose All Company Info. Click on the Company

Are you a rep or studio manager for several photographers and in need of a different Price List for each one?  
  
See Price Lists in the HS Extras folder. With it you can set up any number of named Price Lists for use by Worksheet



Info menu again and choose On. The information entered in Flow Chart's Company Profile is used to create an instant letterhead. These items are moved and/or modified using the other commands in the Company Info menu. This is what we call EZ Graphics. The full Graphics Mode allows much more control over the arrangement of printed reports. It's a more advanced feature than this demo is meant to cover. It's activated by choosing Graphics Mode in the Windows menu of modifiable reports.

The area designated for Remarks can be immediately expanded or contracted to fit the number of words you've used. This is controlled by choosing Remarks in the Margins menu.

## C R E A T E   A N   E S T I M A T E

We'll take you through the basic process of creating a new Worksheet report. It really is as simple as typing Cmd/Ctrl-1, 2, 3, 4, 5, 6. The six steps are the same whether you are creating an Estimate, Open Job, Confirmation or Invoice.

First, let's get Worksheet ready. Click on the Functions menu and choose Reset Worksheet. Now we're ready. Note: This is normally not a necessary step, but we're taking it here due to the demo data saved in the file.

**Step 1** Type Cmd/Ctrl-1, or choose Look Up Contact from the Functions menu. This opens the Contacts file and goes into Search mode. Start typing Don Wallenstein. Since no other name in the file begins with do, by the time you get to the second letter Clairvoyance will pop the whole name into the window. Click on Select or press the Enter key.

**Step 2** Type Cmd/Ctrl-2, or choose Worksheet from the Transfer menu, or choose estimate from the Transaction popup menu. This transfers Don's information to the Worksheet:Report Header.

Click the Estimate# button to have Worksheet enter the next number for you.

Click the Start Date button to have Worksheet enter today's date for you.

Click the Terms button to have Worksheet enter 30 Days for you. This is how long the estimate is to remain valid. On an invoice it indicates the time frame in which the invoice is to be paid.

Click the Terminology button to open the Terminology file. If BROCHURE RIGHTS GRANTED is not in the upper text box, you can choose Brochure from the Identifiers popup menu. Click on the Apply button and then click Yes for the Replace? Message. If you were creating an actual estimate, you would now modify the terminology text by editing the words TITLE, PLACEMENT, SIZE and COLOR, however it's not necessary for you to do so for demonstration purposes. Now click the Enter Terms in... popup menu and choose Worksheet. The terminology text can also be modified in the Remarks area of the Worksheet:Report Header.

**Step 3** Type Cmd/Ctrl-3, or choose Worksheet from the Functions menu. This opens the Worksheet window.

When creating a new report your entire Price List is displayed in the Worksheet window. InView & StockView ship with a sample price list containing the items and prices and markups that are likely to be used on a regular basis. As an InView & StockView user you would modify the sample price list to suit your needs and then Save a New Price List. This way each new Worksheet report starts with your price list in which you can simply type in a Quantity on the lines needed for the report.

DON'T replace or change the zero on the top line. It has a purpose that we won't go into here.

Enter a Quantity of 0, zero, on the Advertising Photography line then tab to the Cost and enter 3000. Since Fees tend to vary from job to job, we've left the Cost field empty on these items, but ready to be filled in when needed. If your fees tend to be fixed these numbers can be entered ahead of time.

Using the window's vertical scroll bar, scroll down if necessary, until you see Design. Design is listed below the upper case DESIGN SERVICES heading. Enter a Quantity of 0, zero, on the Design line then tab to the Cost and enter 500.

At any time you can change the wording in the Item column to fit the situation. You can even write a paragraph in that little box. If you need to enter an Item not in the Price List such as Digital Capture, press Return to create a new line and fill in the blanks.

In most cases this whole part of the process is just a matter of moving down the first column, labeled QTY, and making numeric entries on the lines that are to be included. Lines without an entry in QTY will be excluded from the final report.

Scroll down to the FILM area of the price list and enter some quantities (bigger than zero) on a line or two and do the same in the PROCESSING & PRINTS area. That's right, you're on your own

now. Make this a huge estimate or a small one.

Notice that farther to the right, the Unit Price and Price are both updated as you enter numbers in the QTY column. The Unit Price shows the individual price being charged per item on the line. The Price shows the Unit Price multiplied by the quantity.

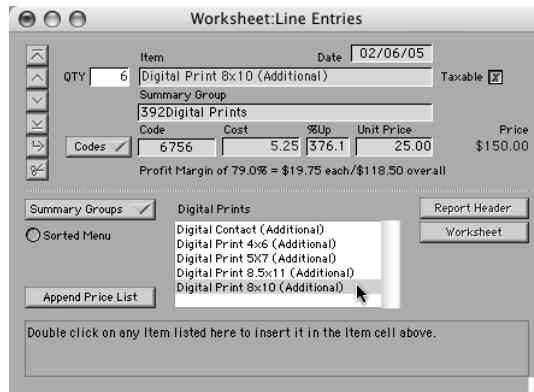
Want to adjust a Cost, Unit Price or Mark Up? No problem. On any of the lines where you've entered a quantity change the number in the Cost column. Notice again that farther to the right, the Unit Price and Price are both updated. In the %Up column change the amount of the markup. Again the Unit Price and Price are updated. Change the Unit Price to a nice even number. The %Up and the Price are now adjusted to reflect the change.

Time Out! Let's take a quick little side trip here. Remember we said earlier that it's a personal choice on whether to use the Worksheet window or the Line Entries window when you were done in the Report Header? Let's take the alternate route and look at the difference. Click on the Windows menu and choose Line Entries or type Cmd/Ctrl-L.

## LINE ENTRIES

The Line Entries window shows one line of Worksheet at a time. It hides less pertinent information while increasing the display of other information. It's designed for rapid location and entry of items for estimating and billing.

Click on the Summary Groups popup menu and choose Film and Polaroids. A list of all the Items in the Film & Polaroids Summary Group appears to the right. Scroll in the list and double click on any Item. The Item is entered in the upper portion of the window and the cursor locates in the QTY cell ready for you to enter the quantity. Change the Cost, %Up or Unit Price. Notice below, that as you make the changes an informational display updates to show the Profit Margin.



The Summary Groups appear in the menu based on their order in the Price List. Click on the Sorted Menu button and then on the Summary Groups menu. The menu is now in alphabetical order.

Continue making entries in the Line Entries window or click on the Worksheet button to return to that window. The choice is yours, remember?

Step 4 Type Cmd/Ctrl-4, or choose Calculate Report from the Functions menu. This totals and subtotals the Worksheet and formats the information for printing. Using the windows scroll bars, if necessary, you can now see the Estimate total. Note: Step 4 is not a required step. Step 5 will always calculate the report before printing it.

Notice that all the lines that had no entry in the QTY column are gone. This is only a temporary state. If you need the Price List back again for additional entries, choose Append Price List from the Functions menu, make the new entries and Calculate the Report again.

Step 5 Type Cmd/Ctrl-5, or choose Print Report from the Functions menu. This opens the appropriate printing form, in this case an Estimate, and Prints the results. The demo previews the report instead. Which form gets used is determined by the Status and Print As settings in the Worksheet:Report Header window.

InView & StockView forms are fully customizable. Margins, fonts and points, and Company information are easily controlled through menus. More precise customization can be done Graphics Mode editing.

Step 6 Type Cmd/Ctrl-6, or choose Post Report from the Functions menu. This permanently stores the Estimate in the file named Estimates. Posting is the final step. It files a copy of the report safely away for future use and reference. Worksheet is now available to start another report.

A series of prompts that follow printing and posting are turned on or off by the Worksheet Preferences settings in Flow Chart.

## FINAL NOTES

Most of the reports printed by Worksheet (and Stocksheets) have standardized terms and conditions that print at the bottom of each page. Many of these same reports have more detailed Terms & Conditions that are typically printed on the back side of invoices, estimates, delivery memos and such. These reports are all accessible via the Reports menus of Worksheet and Stocksheets.



To email a Worksheet report choose Email Export from the Reports menu. Email Export creates a text file that you can insert or attach to an email using any email program. Better still, create the report as a PDF file and send it as an email attachment with all of your fonts and graphics properly installed.

As we mentioned, Worksheet reports can be customized to your look. Custom Forms, as described in the Graphics chapter, allow you to create a virtually unlimited number of forms of your own design to use for your invoices and estimates.

In addition to preparing reports, posted reports can be retrieved to the Worksheet for modification. Estimates often become Open Jobs and Open Jobs become Invoices. For example, a posted Estimate can be transferred to the Worksheet, its status changed to Open Job, and additions or changes made if need be. The Open Job is then posted to the Open Jobs file.

It's not necessary to start reports as Estimates and move them through the sequence. You can just as easily create a brand new Open Job or Invoice without ever having a preceding Estimate or Open Job.

When you need to add to an existing Worksheet report you can add new lines as needed. The Line Entries window contains an Add Record tool on its tool palette. Line Entries has popup menus to help you with your new entry. The Worksheet window also allows for additions to an existing report. You can either add records and type in each new records detail, or Append Price List and simply enter a Quantity on the new entries to the Worksheet.

When adding new entries to an ongoing job retrieved from the Open Jobs file, choose Append Price List in the Functions menu. This adds the complete Price List to the end of the existing report. New quantities are entered and the report is re-posted in place of its earlier version.

Obviously there's much more to this file than the demo can cover. Feel free to explore.

Type Cmd/Ctrl-W to close the file.

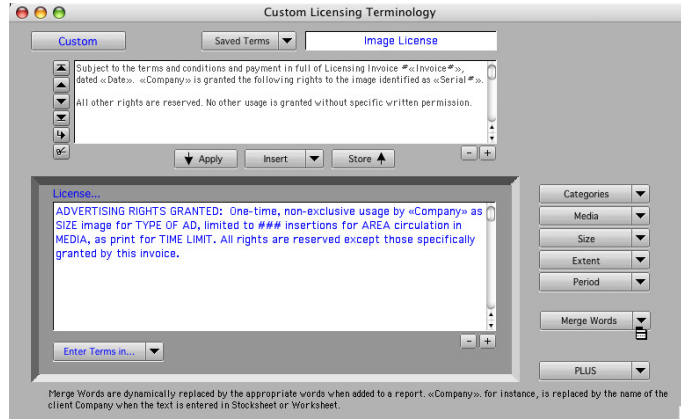
# T E R M I N O L O G Y

Whether you're dealing with assigned work or images from your files, without properly written licenses you have little or no control over how those images are utilized. Licensing is one of the most critical aspects in protecting your bottom line. The Terminology file provides you with the tools to construct, save and retrieve properly written licenses. The results from Terminology can be used in Worksheet, Stocksheet, Licenses and/or written as metadata into the images themselves.

Don't be intimidated by its name. The Terminology file is really quite simple and its value is immense; it protects your work from misuse or loss of ownership.

The Terminology file can store, literally, thousands of sets of terms, roughed in or completed and ready to use. You don't even have to worry about what to put into it; Terminology has sample sets of terms that can be modified, replaced or kept and used. And it has the entire PLUS Media Matrix ready to use.

When you open the Terminology file you see the Custom Licensing window, one of the two windows in Terminology. Interactive Help is displayed at the bottom of the window.



The top portion of the Terminology window has a large scrolling cell displaying one set of the Saved Terms. This cell is for accessing and/or editing sentences, paragraphs or even pages of contractual wording that have been saved in the file.

Directly above the cell is the Saved Terms popup menu and the Saved Terms name cell. This cell is for a name or identifying label representing the set of words currently shown in the Saved Terms cell. The menu lists all the available Saved Terms. You select them by name using the menu.

The lower half of the window has a similar cell for building a license. This is where you construct and modify wording before moving it into Licenses, Worksheet or Stocksheet, or before saving it in the Stored Terms. The contents of this Working Terms cell are temporary.

The buttons between these two cells shuttle their contents back and forth. The array of popup menus on the right insert text in the words already in the Working Terms cell.

You can edit terms in either cell but changes you make in the Working Terms cell are not stored permanently. Only terms created in, or transferred to the Stored Terms cell are preserved when the file is saved.

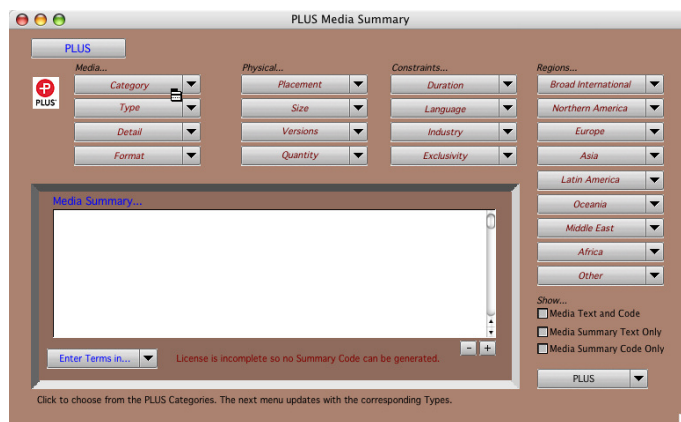
Modify the wording as needed and install Terms from either cell into your Worksheet or Stocksheet. There's no need to rely on your memory or dig through your business practices books when you're trying to put together a license.

## PLUS

The PLUS window has a lot of popup menus and its own work cell where the results of your choices are displayed but never saved.

It is necessary to progress through the menus, starting with the first four in particular. When you choose a Category, the Type menu loads the appropriate Types. Choose Type to load Details, then choose Details to load Format. Once you've chosen the Format, all of the other menus are loaded and responsive.

To build a complete PLUS Media Summary it is necessary to make a choice from



*Tip:* PLUS, the Picture Licensing Universal System, is an international non-profit initiative on a mission to simplify and facilitate the communication and management of image rights.  
See [useplus.com](http://useplus.com)



each of the 12 menus across the top and from at least one of the Regions menus.

The Media menus display at least the first words of what has been chosen from each of them. The complete wording is combined and displayed in the cell below. The rest of the menus change from italicized, colored text to plain black text once a selection has been made from them. This provides a visual guide to show what has yet to be selected.

Language, Industry, Exclusivity and Regions allow you to make multiple choices. Hold the Shift key as you select from these menus to add additional items. Hold Option/Alt to select an already added item to be removed from the assembled words.

## C O M P L E T I N G T H E P R O C E S S

Whether you've assembled your terms in the Custom or the PLUS window, the results can be saved for future retrieval or applied immediately in Worksheet, Stocksheets or Licenses.

The Terminology file helps you assemble a crucial part of a proper and effective license. A complete license requires naming names; the licensor (you), the licensee (the client) and in some cases a third party, the end user. It requires a media usage description as constructed in the Terminology file. It requires specific dates for the start and the end of the usage period. It must include the licensee's obligations such as payment and a credit line. And, it must clearly identify the image(s) being licensed.

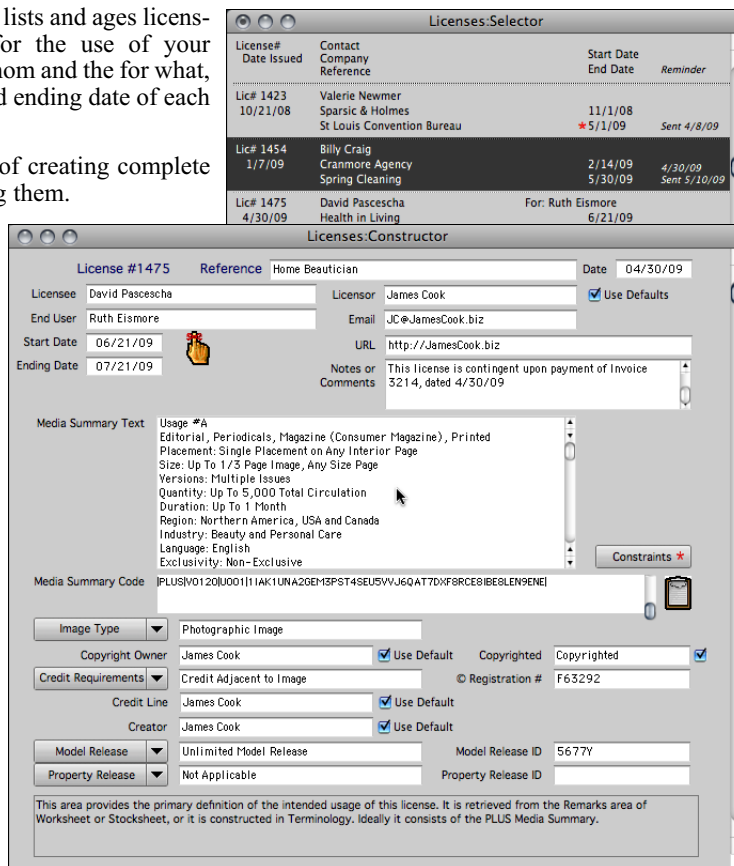
# L I C E N S E S

The Licenses file creates, lists and ages licenses that you've issued for the use of your images. Besides the to whom and the for what, it displays the starting and ending date of each license.

The file is fully capable of creating complete licenses and then tracking them.

The whole purpose of tracking them is in knowing when they expire so you can provide adequate notice to the licensee that their usage has ended and to offer a chance to relicense. Fortunately the Licenses file handles that too.

The Licenses file is designed to fully utilize the PLUS License Data Format, but does not require you to use it. Licenses can be exported as XMP data for use by other PLUS compatible software. The file also imports PLUS XMP data created by other software



## SELECTOR

Each listed license displays the License Number and Date of Issue followed by the Contact, in this case the Licenser, their company and a Reference about this license. To the right is the Starting and Ending Date. An expired license has a red asterisk in front of the Ending Date.

If a Reminder is scheduled, and the license has not expired, the date of the Reminder is displayed on the extreme right. If a Reminder has been issued, the Sent date is displayed.

You can double click on a license in the Selector to view or edit the details of that license in the Constructor window. Or use the Windows menu to view the active license in the Constructor, License or Reminder.

## CONSTRUCTOR

The Constructor window is the window in which you build or edit a license. It shows all of the details of any one license.

Move the cursor over any part of the Constructor window to view the interactive help at the bottom of the window for a brief description of that item.

It is not necessary to completely fill in all of the parts of this window but we don't want that to encourage you to always go for the bare bones.

The crucial parts for a valid license are the Licenser, the Licensee, the Start and End Dates and the Media Summary Text. Of course it's best to include contingencies, such as no use without payment. Any other information you can add helps to protect all parties from misunderstandings and mistakes.

## REMINDERS

Reminders are set for dates on which you want to issue a reminder letter or Notice of License Expiration to the Licensee.

A Reminder can be scheduled by clicking on the Reminder icon or by choosing Set Reminder from the Functions menu. You're asked how many days in advance of the license' expiration you want to be reminded about that fact. The resulting date is then displayed below the icon and in the Selector.



# R E C E I V A B L E S

Receivables is the file that stores and ages invoices created in either Worksheet or Stocksheet. When you post an invoice from either of those files, it's put into the Receivables file where you have a number of ways to scrutinize and analyze the invoices individually or collectively and print the reports. The only information that you can enter into Receivables is payments or credits. If other information needs to be added, such as missing charges, or changed, such as mis-coded charges, the invoice must be Transferred to Worksheet, modified, then re-posted.

The Receivables file displays a list view of the invoices in the Selector window.

The Search menu contains many options for finding invoices individually or as sets. Click on the Search menu and choose Unpaid Invoices. Only the invoices with an outstanding balance are now listed. The display at the top of the window shows the total amount Billed, Paid and Due for this selected set of invoices.

Unpaid Invoices as of Tuesday, February 8, 2005							
Billed \$15,878.06		Paid \$0.00		Due \$15,878.06			
Inv # 201070	Premiere Magazine	279 days past due					
4/21/04	Marcia Stephens	293 days outstanding	Billed	600.00			
	(212) 456-7890		Paid	0.00			
Sub # 201115	Re: 24 Hours in Denver		Due	600.00			
Inv # 201073	Time Magazine	245 days past due					
5/9/04	Sondra Williams	275 days outstanding	Billed	11,390.34			
	(212) 522-4375		Paid	0.00			
Job # 201052	Re: Ted Turner Cover Portrait		Due	11,390.34			
Inv # 201076	Multi-Media Productions &	226 days past due					
5/28/04	Roy Wilson	256 days outstanding	Billed	3,887.72			
	(303) 799-8360		Paid	0.00			
Job # 201054	Re: US West Yellow Pages CD		Due	3,887.72			
TOTALS for Unpaid Invoices			Billed	15,878.06			
			Paid	0.00			
			Due	15,878.06			

The Functions menu contains some Invoice maintenance options such as producing statements on past due invoices, posting payments made to an invoice (or use the Checkbook to post deposits), finding a contact in the Contacts file, or for transferring an invoice back to Worksheet for modifications.

Click once on any one of the displayed invoices to highlight it, then click on the Functions menu and choose Enter Payment . The Payment Entry window opens with the cursor already located in the Amount Paid cell. Type in 500. The window updates to show the New Balance. Click on the Enter button. The payment is entered and you're returned to the first window. The invoice is highlighted and the balance adjusted to show the payment.

Note: Payments can also be Posted from the Checkbook file by entering a deposit and an Invoice number, then clicking a Post button.

The Receivables file can issue statements of account on one invoice at a time or to all companies with unpaid balances.

Use the same invoice or click once onto another, then choose Issue Statement from the Functions menu. You can cancel the Print dialog, then choose preview from the File menu to view how the Statement would print. Notice the Rebilling Fee. This charge is controlled by the Receivables Preferences which you can change by choosing Preferences from the Windows menu.

Click the Preview window's close box. Click the Statement window's close box.

One of the best features in the Receivables file is its reporting capability. The best way for you to analyze the reports produced by the Receivables is to try each one. Choose Accounts by... Month from the Reports menu. Enter 4/00 as the month to report on. Or try any other report.

Date formats for reports with sub-menus allow for reporting within time periods. When you make a choice from a report sub-menu a dialog box opens. The dialog always displays a default in the proper format for date selections.

Months are entered in the mm/yy format. Use one or two digits for the month, a slash, and two digits for the year. (6/00 or 06/00)

Quarter is entered 1 or 2 or 3 or 4 plus the letter Q, plus the two digit year. (2Q00)

Report for a period of a year is entered as two or four digits. (00 or 2000)

Date Range reporting lets you define the beginning and ending dates. Starting and ending dates are entered in a mm/dd/yy format. Enter the month in digits, a slash, the day, a slash, and the year. (08/09/00 or 8/9/00) Note: The Flow Chart's Preference for Date & Money allow you to set your own preference for the date separator as well as for international formats.

The Receivables file can also generate a financial report on any person or company in the file. If you can see an invoice listed for McCann-Erickson Worldwide, click on it once to highlight it. If you don't see an invoice listed for McCann-Erickson Worldwide we can find one. Click on the

Search menu and choose Company. In the dialog window that opens, type mc. Clairvoyance recognizes the name and finishes it. Click the mouse or press Enter and two invoices are selected.

With an invoice for McCann-Erickson Worldwide highlighted, click on the Reports menu and choose Company Financial from the bottom of the menu. After a bit of whirring and flashing a Financial Report window opens to show you the history of this company. Here's a great aid in deciding how to deal with the in the future. Close the window to return to the Selector.

The Functions menu also contains some file maintenance options to help manage the size of the file. Over time invoices accumulate and the Receivables file increases in size. This can overtax your computer and slow down the works. Compacting Receivables makes a backup copy for you before compacting paid invoice to minimal size, so no detail is lost, it is simply saved elsewhere.

To modify or add to an Invoice located in the Receivables, click once on the Invoice, or use the Search menu to find it. Choose Invoice to Worksheet from the Functions menu or type Cmd/Ctrl-T. The invoice is now in the Worksheet where you can add to it or increase or reduce a line item amount. From Worksheet, re-post the invoice when you are done and the old invoice in Receivables is replaced by the new one.

Close the Worksheet file by typing Cmd/Ctrl-W.



# C H E C K B O O K

InView's Checkbook operates like a traditional checkbook. It manages any number of checking accounts, posts deposits as payment to Invoices in the Receivables file and adds expenses to jobs in Open Jobs or Worksheet. Reconciling a monthly statement is a simple process that keeps you and your bank up to date.

Tag	Type	Ck #	Date	Description	Notes	Payment	Deposit	Balance
<input type="checkbox"/>	Check		2015 5/10/03	EGC Gas & Electric		114.23		41,696.92
<input type="checkbox"/>	Check		2016 5/10/03	1st Bank		500.00		41,196.92
<input type="checkbox"/>	Deposit		5/10/03				3,500.00	44,696.92
<input type="checkbox"/>	Check		2017 5/15/03	Frank Delarney		500.00		44,196.92
<input type="checkbox"/>	Check		2019 5/17/03	Joey Sapluto		2,400.00		41,796.92
<input type="checkbox"/>	Check		2018 5/17/03	Gary Meigrip		869.87		40,927.05
<input type="checkbox"/>	Check		2020 5/20/03	The Oil Patch		57.00		40,870.05
<input type="checkbox"/>	Check		2021 5/24/03	Joey Sapluto		2,400.00		38,470.05
<input type="checkbox"/>	Check		2022 5/24/03	Gary Meigrip		869.87		37,600.18
<input type="checkbox"/>	Check		2023 5/24/03	Dawson Photo	Invoice #54432	1,790.44		35,809.74
<input type="checkbox"/>	Deposit		5/28/03				1,203.10	37,012.84
<input type="checkbox"/>	Check		2024 5/31/03	Joey Sapluto		2,400.00		34,612.84
<input type="checkbox"/>	Check		2025 5/31/03	Gary Meigrip		869.87		33,742.97
<input type="checkbox"/>	Deposit		5/31/03				14,870.38	48,613.35

Checks can be distributed to a virtually unlimited number of Expense accounts. The Checkbook contains a wide variety of reports including information for 1099's. Checkbook and Payables work intimately together. Checkbook handles the present and past transactions. Payables handles the future. Payables keeps track of what you owe, helping you to budget. Most transactions start in Payables and are transferred to Checkbook when paid, but Checkbook can be used independently.

Some of the information used by both Checkbook and Payables is stored in the folder named Checkbook Resources. There's seldom any need for you to work in that folder; both files know how to get what they need there.

Checkbook can be opened by double clicking on the Checkbook file in the InView & StockView demo folder or by clicking on the Checkbook button in the Flow Chart.

Checkbook opens in the Register window, a scrolling list of checks, deposits and other transactions.

Pay particular attention to the selecting abilities built into many of the popup menus heading the columns. These provide the means for instantly generating many onscreen reports. As you select different sets of records, the display in the upper right corner of the Register shows the totals for Payments and Deposits within the selected set.

Within the Description column, click onto any record. Then click and hold on the Description, such as Gary Meigrip. A popup display shows you the breakdown of the check.

The Type column identifies the Transaction type of each line.

Double click on any line's amount identified as a Check to see its details. Click the Register button to go back to the Register.

Double click on any line's amount identified as a Deposit to see its details. Click the Register button to go back to the Register.

Depress the mouse on the Enter New: popup menu button and choose Check. The Payment window opens with today's date entered and highlighted, in case you need to change it. Press the Tab key and start typing Dawson Photo. When Clairvoyance finishes the name for you, press the Tab key.

The name and address fill in, as does the account number, and the cursor moves on to the Memo cell. Press Tab again, then once more. The cursor should now be blinking in the first cell under Account Name. Click on the Account Name popup menu and choose Film Expense. The Account Name and its number are filled in and the cursor hops to the Amount cell. Type in 300 and press the Tab key. The decimal and zeroes are added for you and the cursor moves to the next line.

Checkbook can assign distribution of a check to many different accounts or categories. Click on the Account Name popup menu again and choose Lab Fees. Once again, the Account Name and its number are filled in and the cursor moves to the Amount cell. Type in 150.30. This time press the Enter key. The numbers are entered, but this time the cursor doesn't move on to a new line.

Click on the Print popup menu in the upper right corner of the window and choose Print This

Check. A Preview of the check as it would print is displayed. Close the Preview window.

You're now in the Check w/Stub window. This is the printing template for the check. Click on the Company Info menu and choose All Company Info. Click on the menu again and choose On. The EZ Graphics elements appear on the check. As elsewhere, they can be modified or repositioned using other Company Info menu commands or in the full Graphics Mode.

Close the Check W/Stub window. You should be back in the Checkbook:Register window.

Lets enter a new deposit and post it to an existing invoice. In the Checkbook:Register window depress the mouse on the Enter New: popup menu button and choose Deposit.

Click in the first cell below the Inv.# popup menu. Depress the mouse on the Inv.# popup menu and release on Link Receivables. This opens and creates a link to the Invoices in the Receivables file.

Depress the mouse on the Inv.# popup menu again and release on the line that begins with Premiere Magazine. This inputs the Client and Invoice number for you and places you in the CK#/Notes cell.

Type in Check #123 then press the Enter key and click in the Amount cell. Note: Account Name and Code are necessary only if the deposit is not Receivables income. Example: a refund check issued to you for a returned item would be coded to the original Expense account the purchase was coded to.

Type in 600.00 in the amount cell. Click the Post button to credit this deposit as a payment to Invoice # 97070. Close the Receivables file by clicking the close box or by typing Cmd/Ctrl-W.

Close the Checkbook file by typing Cmd/Ctrl-W.



# P A Y A B L E S

Payables is very similar to Checkbook. Use Payables to keep track of anything you bought but have not yet paid for or for recurring bills. When you use your credit card or buy from a vendor on account, enter the purchase in Payables. Some examples of recurring bills are scheduled payments like a car loan, taxes or rent. The Payables file makes it easy to set up recurring entries with just one initial entry.

Tag	Date	Due	Paid	Vendor	Description	Owed	Paid	Balance
<input type="checkbox"/>	5/9/04	9/14/04		Auto Lease Corp.	Monthly Lease	345.56		5,670.91
<input type="checkbox"/>	5/9/04	10/14/04		Auto Lease Corp.	Monthly Lease	345.56		6,016.47
<input type="checkbox"/>	5/9/04	4/30/04	5/9/04	Landlord Realty Co.	Studio Rent	1,750.00		7,766.47
<input type="checkbox"/>	5/9/04	5/31/04		Landlord Realty Co.	Studio Rent	1,750.00		9,516.47
<input type="checkbox"/>	5/9/04	6/30/04		Landlord Realty Co.	Studio Rent	1,750.00		11,266.47
<input type="checkbox"/>	5/9/04	7/31/04		Landlord Realty Co.	Studio Rent	1,750.00		13,016.47
<input type="checkbox"/>	5/9/04	8/31/04		Landlord Realty Co.	Studio Rent	1,750.00		14,766.47
<input type="checkbox"/>	5/9/04	9/30/04		Landlord Realty Co.	Studio Rent	1,750.00		16,516.47
<input type="checkbox"/>	5/9/04			Landlord Realty Co.			1,750.00	14,766.47
<input type="checkbox"/>	5/9/04			Auto Lease Corp.	Monthly Lease	345.56		14,420.91
<input type="checkbox"/>	5/16/04	6/29/04	5/23/04	Dawson Photo	Film Purchase	652.38		15,073.29
<input type="checkbox"/>	5/20/04	6/29/04		AmeriBank Visa	Avis Rent A Car	86.00		15,159.29
<input type="checkbox"/>	5/22/04	6/29/04	5/23/04	Dawson Photo	Scans	165.00		15,324.29
<input type="checkbox"/>	5/23/04			Dawson Photo			1,790.44	13,533.85
<input type="checkbox"/>	5/26/04	6/29/04	5/23/04	Dawson Photo	Processing	12.30		13,546.15
<input type="checkbox"/>	5/30/04	6/29/04		Dawson Photo		360.00		13,906.15

When your bills are due, use Payables to access one or several of Checkbook's checking accounts and generate the check or mark an auto withdrawal. Payables transfers information about bills to Checkbook, Open Jobs and Worksheet.

In general Payables keeps all of its information together as a set, a Payables Account. If you prefer, Payables handles multiple Payables Accounts, perhaps one for business and another for personal expenses. A temporary Payables Account can serve as a job file to track expenses related to a job.

Paying bills is easy and automatic since Payables reminds you when bills are due and gives you the choice of paying by vendor or by all vendors at once.

Some of the information used by both Checkbook and Payables is stored in the folder named Checkbook Resources. There's seldom any need for you to work in that folder; both files know how to get what they need there.

Payables can be opened by double clicking on the Payables file in the InView & StockView III demo folder or by clicking on the Payables button in the Flow Chart.

Payables opens in the Register window. In our sample data, there might be some bills due, so upon opening the Payables if you get a message, "You have some bills due. Do you want to view them?" Click the Yes button.

The Payables Register window is a scrolling list of bills, both paid and unpaid. It also contains entries to indicate when any bill or group of bills is paid. If you clicked Yes to view due bills, the list shows just the unpaid bills with due dates that have arrived.

Many of the records are color coded to provide visual alerts for you. Red indicates that a bill is due or past due, yellow is soon to be due and black is paid or not yet a threat.

Use the scroll bar on the right side of the Register window to scroll down. Double click on the AmeriBank Visa's amount for \$86.00, dated 5/21/00, to open that item's detail.

Notice the popup menu buttons located in the top right area of the window. One is Add to Job which allows linking to the Open Jobs file and posting to a particular Open Job. The other is a Pay popup menu.

Depress the mouse on the Add to Job popup menu button and release on Link Open Jobs File.

This simply opened the Open Jobs and created a link between the Payables and Open Jobs.

Depress the mouse on the Add to Job popup menu button and release on 98053 - Bolton Hotels. The Open Jobs file is activated and the entry is added to the job. Notice once you're back at the Payables Entry window, the Add To Job popup menu no longer appears. The item is posted to an Open Job, so the option goes away.

Click the Register button to go back to the Register.

The Pay popup menu button is located in the upper right corner of the Register window. Depress

the mouse on it and release on AmeriBank Visa, located below the Pay From Selected Entries This Vendor... Notice the Account Number in the Memo cell and the Credit Limit of \$20,000. This information is stored in the Contact record for AmeriBank Visa.

You now have a choice of which of the six items to pay, or to pay all of the items. Click the Tag All button located above the extreme left column of items to pay. All items are X'd or tagged to be paid.

Click the X to the left of the Airfare for 1,542.35 to un-tag it. (Another way is to tag the five entries individually to be paid.) Notice that the Available Credit updates as you tag or untag bills.

Click the Create Check button located in the upper right corner. The File takes a moment to compile the information, create a check and then return to the Payables file and automatically mark the bills as paid.

Choose Checkbook from the Windows menu. You are transferred to the Checkbook Payment window where the newly created check to AmeriBank Visa has been created. Click on the Print popup menu and choose Print This Check. A Preview of the check as it would print is displayed.

Close the Preview window, then type Cmd/Ctrl-W to close the Checkbook. Type Cmd/Ctrl-W again to close Payables.



# E Q U I P M E N T

The Equipment file helps you make lists of your equipment, establish values for it, develop insurance lists, track warranties, and repairs. If that's not enough, there's more. Categorize your equipment and generate packing lists for different kinds of jobs.

The screenshot shows a window titled "Equipment:Record" with various input fields and sections. On the left, there are navigation arrows and a "Tag" checkbox. The main area contains fields for "Item" (Camera), "Manufacturer" (Canon), "URL" (http://consumer.usa.canon.com), "Model" (EOS-1Ds Mark II), "Serial Number" (046243305417), "Warranty" (1.00 Years), "Country of Origin" (Japan), "Weight" (1.2 kg), and "Carnet Value" (8,000.00). On the right, there are fields for "Purchase Date" (11/17/04), "Cost New" (8,007.00), "Years of Life" (3 Years), "Salvage Value" (100.00), and "Current Value" (9,188.66). There are also checkboxes for "New" and "Used". A "Comments" section contains the text "Be sure to always pack the charger". Below that, there are sections for "Categories", "Location" (Studio, Lightware MF2012), "Repair Comments", and "Repair Costs". At the bottom, it says "Viewing 1 of 56 Selected Records from 56 Total" and "Modified On: 2/8/05". A note at the very bottom states: "Based on several of the entries above, this is the value for insuring the item."

With the use of the Interactive Help, most of the fields here should be self evident in their purpose. There's a place to enter just about everything about any piece of gear. The monetary cells along the right side of the window work together to factor insurance values as well as depreciation.

Reports from the Equipment file include an Insurance Report which uses your entries and settings to show the basis for insurance and the amount each piece should be insured for. There's a Carnet Report for traveling internationally with your gear and a report that can be used as a packing list for jobs or trips. The packing list is easily compiled for all sorts of jobs using the Categories.

Use key words in the Categories to identify or locate specific groups of equipment. Each piece of equipment can have any number of keywords.

Track who has what equipment in your business, or in which office... or even where it's kept. This is a terrific help if you have particular types of jobs, maybe location indoors, or tabletop jewelry or paparazzi, and need a list of equipment to pack for each. You know the sorts of jobs you do and what you need for each. Use an appropriate key word to select from the Search menu, then print a list of job-specific equipment... a check list, or instructions for a new assistant.

Assign multiple key words to each piece that goes out for several different kinds of job. Words like Industrial, Location, MaxLocation, MinLocation help you assemble appropriate combinations. Key words can identify the storage location, the working location or the user of equipment. Track things you lend or rent, so you won't forget who has what.

Assign a storage place key word in addition to other key words so your assistant knows that the spare flashmeter goes in the same Lightware case as the big power pack.

The Equipment file is also a great place to save information about your software; serial numbers, versions and the URL of the developer.

# GENERAL LEDGER

The General Ledger, GL, is the financial heart of your business. It consolidates information from Receivables, Checkbook and Equipment. Using the Chart of Accounts it posts monthly income and expense totals to the appropriate account to show the recent financial activities of the business.

InView's General Ledger is very simple to use and with a single command posts your end of month figures closes your year. This demonstration does not allow the operations of closing a month or closing out the year, but you will be able to view reports as well as account detail and monthly total detail.

Open the General Ledger from the Flow Chart or double click on it in the InView & StockView folder. GL opens to the Accounts window where you can view the current balance of each account. The Accounts window lists the Account Code, the Account Name, the Account Type and the Current Balance of each account. You cannot make changes in this window, but by using the search menu you can look at different selections of accounts.

Choose Assets from the Search menu. This simply narrows the view to Asset Accounts only.

Double click on the Accounts Receivable line. This takes you to the Accounts Receivable Detail. The detail consists of monthly totals that were transferred from the Receivables file and from the Checkbook file.

Let's go one step farther. Double click on the line showing a Debit of \$23,481.16. After a moment you are in the Receivables file where the month's detail has been selected and totalled by account code. The GL provides this path so you may see source detail that comprised the month's total.

Type Cmd/Ctrl-W to close the Receivables file.

You should now be back to the General Ledger Account Detail window. This window can show you details on any of the GL Accounts.

Click on the Account Codes popup menu at the top center of the window and choose 1200 Business Checking Account. Here you see the monthly totals of checks written (credit totals) and deposits made (debit totals).

Click on the Accounts pop menu again and choose 5050 Advertising Photography Income. Here you see the comparison of income for Advertising Photography for two months.

Next choose 7740 Rent Expense. The Balance column here shows that \$1,750.00 was paid in Rent.

Click the close box, or choose Accounts from the Windows menu to return to the Accounts window.

The Sort menu contains three options; Sort by Account Name, Sort by Account Code, and Sort File which resets the General Ledger.

Try any of the report listed in the Reports menu. The General Ledger contains data for 4/04 through 5/04, just so you have some dates that will get results.

When you're finished, type Cmd/Ctrl-W to close the file.

Account Code	Account Name	Type	Debit Balance	Credit Balance
1100	Petty Cash	Current Asset	50.00	
1200	Business Checking Account	Current Asset	89,226.81	
1300	Accounts Receivable	Current Asset		-3,314.60
2100	Equipment	Equip Fixed Asset	9,542.25	
2150	Equipment Depreciation	Equip Fixed Asset		-9,542.25
3100	Accounts Payable	Liability		13,906.15
3400	FICA Withholding	Liability		191.26
3410	Federal Withholding	Liability		444.00
3420	State Withholding	Liability		125.00
3500	Sales Taxes Payable	Liability		23.85
3900	Advance Received	Liability		0.00
4200	Drawing Account	Capital	-5,155.74	
4500	Net Worth	Capital		0.00
4800	Net Income	Capital		0.00
5000	Income	Income		3,500.00
5050	Advertising Photography Income	Income		29,000.00
5100	Architectural Photography Income	Income		0.00
5150	Corporate Photography Income	Income		0.00
5200	Editorial Photography Income	Income		5,000.00
5250	Miss. Photo Service Income	Income		1,558.00
5300	Public Relations Photography Income	Income		0.00
5350	Stock Photography Income	Income		0.00
5400	Studio Photography Income	Income		0.00
5450	Gain on Sale of Equipment	Income		0.00
5500	Holding Fees	Income		0.00
5550	Interest Income	Income		0.00
5600	Mark Ups	Income		4,402.81
5650	Miscellaneous Income	Income		0.00
5700	Rebilling Fees	Income		0.00
5750	Research Fees	Income		0.00
5800	Usage Fees	Income		600.00
5900	Design & Illustration Fees	Income		0.00
5950	Consultation Fees	Income		0.00
6000	Reimbursement Expenses	Income		0.00
6280	Reimbursement Assistant	Income		13,640.00
6330	Reimbursement Automobile	Income		2,425.12
6460	Reimbursement Equipment Rental	Income		1,895.09
6490	Reimbursement Film	Income		2,963.55
6520	Reimbursement Printing	Income		0.00
6540	Reimbursement Lab Fees	Income		2,025.70
6545	Reimbursement Service Bureau	Income		0.00
6550	Reimbursement Miscellaneous	Income		1,968.63
6660	Reimbursement Photo Supplies	Income		0.00
6690	Reimbursement Postage & Shipping	Income		295.25
6760	Reimbursement Sets & Props	Income		5,327.65
6840	Reimbursement Telephone	Income		17.45
6890	Reimbursement Travel	Income		4,103.72
6860	Reimbursement Travel Meals	Income		204.72
6990	Sales Tax	Income		0.00
7000	Expenses	Expense	0.00	
7240	Advertising Expense	Expense	0.00	





# C A T A L O G U E

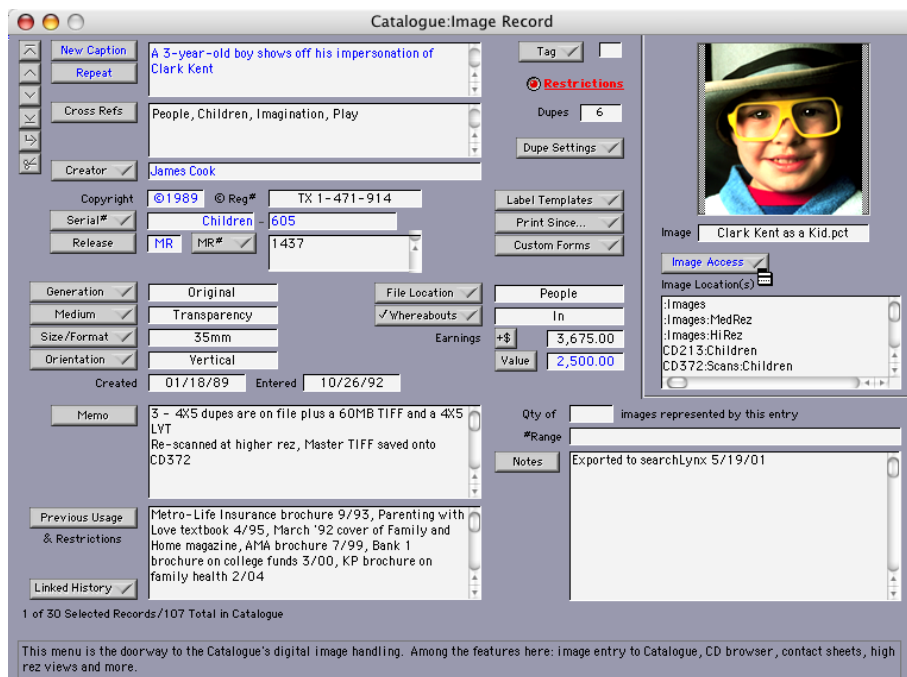
The Catalogue file serves as your computerized image librarian. Whether your images are analog, digital or a mixture of both, Catalogue handles everything about them. When dealing with digital images, Catalogue's Browser can read, write, import and export META data attached to the images. It generates captions for your analog images quickly and easily and tracks nearly everything about your images and their histories.

Catalogue has the ability to generate HTML code for pages of thumbnail images for email or for your web site. Go one step further with searchLynx, a dynamic image catalogue for your web site that creates a searchable catalogue of your stock imagery.

For your analog images, StockView is bar code ready. The Catalogue file, for instance, can install pre-existing bar code numbers into its serial number cells. Submissions and Returns can be bar coded, too. You need a bar code reader, a bar code font (Code 128 or Code 39) and a laser printer.

Open the Catalogue by clicking on the Catalogue popup menu in the Flow Chart or by double clicking on Catalogue in the InView & StockView demo folder.

*NOTE: The demo Catalogue is limited to only display PICT images. When fully licensed it handles TIFF, JPEG, PSD and many other image formats.*



Catalogue opens to the Image Record window. This is where you enter and view all the information about any single image. Each box of information here is called a cell and together the cells make up a record. Several cells have adjacent buttons bearing their titles. These buttons trigger automated data entry or other actions related to the cell.

The top center cell is the actual caption of the image. This is what the labels are all preset to use and the primary information that is used as META data. It may be information imported from META data already in the image. The cell can hold the equivalent of nine pages of text, but that might be a bit much for most uses.

In the upper right corner of the Image Record is a 2x2 inch area for displaying digital images. StockView displays images in their proper proportions. Vertical and horizontal images are NOT forced to fill the square display area.

Below the picture box are two cells that determine what, if anything, is to be displayed there. The Image cell is for the title of the Image as it is saved on disk. The Image Location tells StockView where to find the Image. The Catalogue does not actually store a copy of the image, but instead keeps track of where it is located on disk. Images are accessed only when needed saving disk space, RAM and keeping speed at a maximum.

New entries are made by choosing Enter New Caption from the Functions menu, typing Cmd/Ctrl-E or by clicking on the L-shaped arrow of the tool palette on the left side of the window.

When you make new entries in Catalogue it's not necessary to fill in every cell. In fact, how many or how few you actually use is up to you. If you're just trying to do some rapid caption entries,



we've created a streamlined window for that purpose. Type Cmd/Ctrl-K or choose Caption window from the Windows menu. The Caption window is a simplified version of the Image Record window. New entries can be made here and then filled out more completely at a later time, if ever.

Type Cmd/Ctrl-L or choose Image Record in the Windows menu to return to the Image Record window.

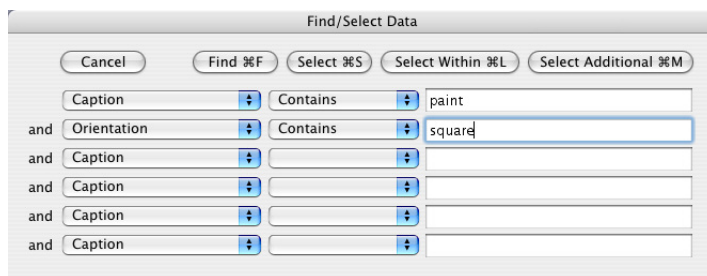
Entering information is one thing. The information is only useful if you can find it again. Catalogue excels in providing tools and means to locate images. EVERY field in Catalogue can be searched for any piece of information. The searches can be limited to one field at a time or to multiple fields at once.

Click anywhere inside the Caption cell. Now from the Search menu choose Find/Select. The lower half of the resulting dialog window should now read "Caption contains" and the cursor is blinking in the cell on the right. The search is ready to find any caption containing whatever you type in. Type paint and click on Select. The bottom of the window should show 1 of 3 records selected meaning that 3 entries had paint within their Captions.

To view these three records you can choose one of many options. Use the Up and Down arrows on the tool palette to scroll through them, or choose Data Sheet form the Windows menu, or better still, choose Image List from the Windows menu.

Let's get just a wee bit fancier with our searching though. If you're not viewing the Catalogue:Image Record window type Cmd/Ctrl-L or choose Image Record from the Windows menu. Click in the Caption cell again and type Cmd/Ctrl-F. This should put you right back where you were earlier.

Type paint into the cell again, but DON'T click on Select yet. Instead, click on the word and on the second line, it changes to or. Click again to change it back to and. On the second line in this window, click and hold on the word Caption. A menu listing all the fields within Catalogue appears.



Choose Orientation. Now, on the same line click and hold on the word contains. A menu of selecting options appears. Look, but leave it set on contains. In the cell at the right end of the same line, click and type square. Now press Select. Notice that the bottom of the window now shows 1 selected.

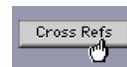
Choose Select All in the Search menu to get all 25 records selected again.

The HindSight User's Guide contains much more information on using this searching feature, plus illustrations. We can only go so far here. Hopefully you get the idea though.

## CROSS REFERENCES

Cross References are a part of finding images too. A good set of cross references makes it possible to find images by all sorts of information that is not included in the Caption or other fields. But finding images by their Cross References is much easier when there's been some regularity in how they've been entered.

At any time, you can type freely into the Cross References cell, but to ensure consistency, StockView offers special aids for automating your Cross References using a "controlled vocabulary". Click the Cross Refs button, located on the Image Record window, to open the Cross References file.



Cross References has three parts, the Category, Sub-Categories and Details. The Categories lists your most basic Cross References. Whenever you select or highlight a Category, the Sub-Categories list is updated to list the appropriate choices for that Category. Choices made in the Sub-Categories list in turn update the Details list.

So that you can explore these list while making cross referencing decisions, choices you make of the Cross References file are not entered in the Cross References cell (in Catalogue) until you double click an item. Double clicking a Category, enters it into the active Image Record. Double click a Sub-Category and both the Category and it's Sub-Category are entered into the active Image Record. Same goes for the Detail list.

Let's try one. Click on the Categories list scroll bar and scroll down to People. Click once to highlight People. Now the Sub-Categories list contains all the Sub-Categories appropriate for People.

Click once on the Sub-Category Children. The Details menu is now loaded with Details on Children. In the Details list, double click on Play. The selections are now all added to the Cross References cell unless they already exist there. As you work, each menu offers you the ability to add new selections to any of the lists for future use.

Click on the Cross Refs button again and play with some of the items in it's Functions menu. You'll hurt nothing. There's much more information on Cross Referencing in the chapter here on Cross References.

## S E R I A L N U M B E R I N G

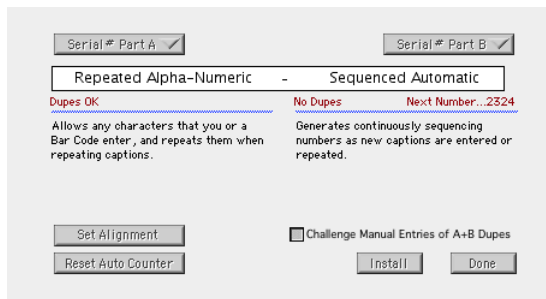
Click on the Catalogue:Image Record window to bring it to the front. As with many features in InView & StockView, how Serial Numbers are generated, if at all, is entirely up to you.

The Catalogue file uses a two-part serial number. Part A and Part B. You can use either one of the two parts or both. Each part can be set to any of eleven settings. Some settings are fully automated, some are absolutely manual and some are a little of each. Automated systems install numbers for you when you create a new entry or command Catalogue to Repeat Captions. Sequenced settings increment numbers for Repeat Captions.

Choose Serial Numbers from the Windows menu.

The titles Serial# Part A and Serial# Part B are popup menus. Click either of these titles to see a list of the eleven numbering systems available. Four are alpha-numeric systems, meaning any keyboard character is acceptable. Seven are numeric systems which allow only numerals.

When you Select a numbering system from either of these menus, your selection appears in one half of the long rectangular box. A short explanation of that particular numbering system appears below it.



Note: Choices made in popup menus do not change the current numbering system until you click the Install button. There's no harm in trying several combinations to see the descriptions and possibilities. In fact, its a good idea to experiment and evaluate potential combinations without making any commitments. As you select numbering systems from the menus, Part A and Part B displays StockView's suggested setting. You, however, have the final say.

Below parts A and B you can indicate if duplicate numbers are permitted or not. Click under either A or B and a menu pops up listing Dupes OK and No Dupes options. The choice is yours. As you select numbering systems for Serial A and Serial B, these displays update to StockView's suggested setting.

Click the Done button to close the Serial Number setup dialog.

## D I G I T A L I M A G E S

StockView has many ways that it makes use of digital image files in TIFF, JPEG, BMP, PICT and GIFF format at any resolution.

StockView is fully capable of reading, writing, importing and exporting META data. META data is written information stored within an image file. It's often referred to as IPTC data. In PhotoShop it's the File Info.

META data is useful to identify the image, it's creator and to bear descriptors such as captions and keywords.

Whenever an image is added to Catalogue, any embedded META data is automatically included.

Let's look at the simplest way to add an image.

Make a new entry by typing Cmd/Ctrl-E. On the Image Record window is the Image Access popup menu, located below the 2x2 image, which offers a number of image access options. Click on this popup menu and choose Install Image. A window opens for you to browse to any image on your hard drive and select it as the image to be associated with this entry. Any attached META data is also imported and entered into the appropriate places in this image record.

Other resolutions may be listed as well if the program discovers like-named images in adjacent folders for other resolutions. Notice that the Image Access popup menu has Add Resolutions to allow you to browse to other resolutions of this image in order to add them to the record.



The Image Access menu includes the option to enter an entire folder at a time using Catalogue a Folder.

It also allows you to open any one of the listed resolutions in your preferred editing program, such as PhotoShop, or to rename the image and its various resolutions.

To see what some of the other choices in the Image Access menu do, locate one of the demo entries that has a picture showing. Depress the mouse on the Image Access popup menu and choose View Full Image. This opens the Image window

The Image window displays images of virtually unlimited proportions. You need a wall size monitor, a few gigabytes of memory and a lot of time to tax its limits. You'll run out of money and hardware long before StockView runs out of capacity. The point is, you can display very large, high resolution images in Catalogue if your hardware can handle it.

The Image name appears on a popup menu in the top left corner of the Display Full Image window. This menu lists the various Image Locations entered for this Image. When you select one, the image displayed changes to show the resolution or variation this path leads to. If the image at that location is not on-line at the moment or if it's a wrong file type, nothing appears. Space considerations prevented us from including high resolution images for this demo.

No matter what resolution you're viewing, it is sized to fill the window. As a result, when the window is small, just about everything looks nice. When it's big, low resolution images become heavily pixelated, made up of lots of little squares, which may look more like cubism nouveau.

To resize the Image window, click in the zoom box in the upper right corner or drag the grow box in the lower right corner of the window. The window can be resized to anything that fits your monitor.

Click the Image window's close box to close this view. Click on the Search menu and choose Select All.

Back in the Image Record window, depress the mouse on the Image Access popup menu and choose View Thumbnails. The window shows currently selected Images and their Captions, Serial Numbers and Creators. Each Image is shown the same size as in the Image Record. When the window opens, the display shows three Images. As you resize the window, Catalogue reconfigures the display to fit as many as possible of the selected images in the screen area. Some appear blank because not all images were packed with the demo.

Double-click on any Image in the Thumbnail window to have StockView locate and open the Image Record window.

Close the Thumbnails window and return to the Image Record window.

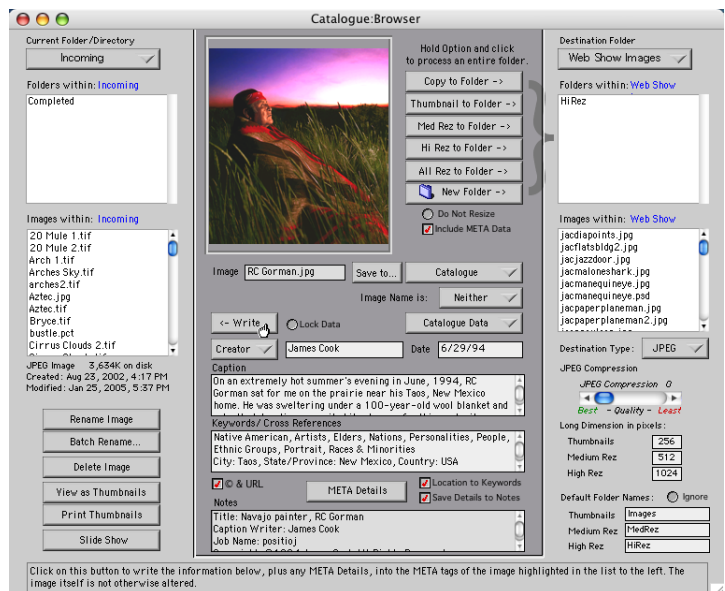
## BROWSER

Catalogue's Browser window is essentially your digital light table capable of applying its tools to images whether they're in the Catalogue or not.. It allows you to view, rename and delete images from folders on your computer. You can move the images from one folder to another, converting their file type and size in the process. Single or en masse, they can be catalogued including META tags that have been written into them.

The Browser window edits META data already in images, imports META data to add to other images or to the Catalogue and exports META data from the Catalogue to selected images.

The flow of the Browser tends to be from left to right. The left side is used to locate images on your dives, trigger file management options or jump to related windows.

The information displayed in the Center of the Browser can be META



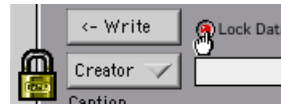
data read from an image, data retrieved from a Catalogue entry or it can be typed in as needed. From the Browser it can be written as META data into an image file, entered into a Catalogue record or both.

## READING META DATA

To read META data in an image, locate the image via the menus and lists on the left side of the Browser window. As image names are highlighted, the central area updates with any META data found within the selected image.

Reading META data does not affect the image or any existing META data in any way.

The META reading does not occur if the text is locked.



The purpose of locking data is to prevent the data from being replaced by META data from other images as they're selected. This makes it possible to hold text as you locate other images to which you want to export the displayed info.

## WRITING META DATA

To write META Data to an image, click on the Write button. The displayed information is written to the image highlighted in the list on the left.

To shift to another image without losing the displayed information, click on the Lock Data button. With locked data, it's possible to rapidly move from one image after another, writing the same data to each.

## CATALOGUE DATA

The Catalogue Data popup menu has two choices; Get Data from and Write Data to. The choices work in conjunction with the Catalogue selected and named beside the Save To... button above.

Catalogue Data works solely with the text of the current record of that Catalogue. It does not install or replace images.

The current record is the entry within that Catalogue that is displayed in the Image Record or highlighted in the Data Sheet at the time that you apply one of the Catalogue Data features.

## GET DATA

Get Data from: pulls information from the current record of the named Catalogue and fills in the Browser cells accordingly. Any information displayed in the Browser is replaced by the information from the Catalogue.

Properly labeled data in the Notes field of the Catalogue record gets parsed into the META fields shown in the META Details.

## WRITE DATA

Write Data to: collects the information shown in the Browser and enters it into the current record of the named Catalogue. If it detects that information already exists in the active record, you're asked if that information should be added to or replaced.

Writing data in this manner is useful if you retrieved data from the record and added more keywords or other information to it. The updated information can then be added to the record.

## ADD TO...

The displayed image can be added to the catalogue, or another, by clicking on the Add to... button. A new record is added to the catalogue, the info is entered and the image is linked.

Depending on settings in the lower right of the Browser, described below, various resolutions of the image may be created in a series of folders.

Hold the Opt/Alt key as you click on the Add to... button to add all of the images listed on the left at once.

## DESTINATION FOLDERS

The Browser offers a number of options for moving images from their current location to other locations. In the process the images can be converted from one file type to another and/or resized proportionally. Where the images go is determined by the popup menu and lists in the upper right corner of the Browser.

These items work in exactly the same manner as their counterparts on the other side of the Browser. Use the menu to select a drive, click in the list of folders to dig deeper into the hierarchy and use



the menu again to move back up the hierarchy.

As you maneuver through folders and drives, the second list displays the names of images already in that location. Highlighting images in this list does not cause them to be displayed in the Browser. This list is for reference; showing you what's there as an aid in your decisions about where new images belong.

#### FILE TYPES

Images can be converted to JPEG, TIFF, PICT or BMP file types. Or their type can be retained as they're converted to a variety of sizes.

Use the Destination Type popup menu to select the desired file type of the images you're copying. For JPEG, you can also set the amount of compression. More compression produces a lesser quality image, but reduces space requirements.

#### IMAGE SIZES

You can specify up to three resolutions for the converted images. For consistency, enter your definition of thumbnails, medium resolution and high resolution. In the cells designated for these resolutions enter the size, in pixels, that should be applied to the long dimension of an image. The long dimension is the height on vertical images and the width on horizontal images - whichever is greater. The other dimension, the short dimension, is then factored proportionally.

The number of pixels represents the image size at screen resolution. To help you determine the sizes that you want to use, consider opening an image in an image editing program such as PhotoShop. Set the image resolution to match your screen resolution, probably between 72 and 96 pixels per inch. Going to the large end of 96 is a safe move. Resize the image to what you want as a thumbnail, as a medium resolution and as a high resolution and note the dimensions in each case.

Why three resolutions? Throughout StockView and the Catalogue, images are displayed as thumbnails. Most displays are two inches by two inches. If the long dimension of your thumbnail images is at least two inches, the displays should look fine on your screen. This is also the image the program uses for thumbnails heading to your web site if you have the HTML Export automatically load the images.

#### VIEWING IN THE BROWSER

It's worth noting that the Browser is an elastic window. That is, it can be resized and its contents are stretched to match the new dimensions. It can go as large as your monitor.

#### OTHER BROWSER FUNCTIONS

There's far more to the Browser than this simple tour can cover. Following are some abbreviated descriptions of some of them.

##### RENAME IMAGE

To rename any image, highlight it in the list and click on the Rename Image button. A dialog opens for you to enter the new name which is then applied to the image file on disk. Images on read only media, such as a CD or a locked disk cannot be renamed.

##### BATCH RENAME

In the event that you want to replace or change the names of several images in a folder, Batch Rename offers several naming options. The button opens the Batch Rename window which is described at the end of this section on the Browser.

##### DELETE IMAGE

For those images that fail to live up to your expectations, or to simply clear them from your drive, click on the Delete Image button. After asking you to confirm your intentions, the image is irrevocably deleted from your drive.

##### VIEW AS THUMBNAILS

Images in the selected folder can be viewed in a configurable thumbnail layout. This button opens the Thumbnail view which is described later in this chapter.

##### PRINT THUMBNAILS

To print a page of thumbnails for the images listed, click on this button. The Thumbnails page opens and your printer dialog appears, ready to print the page(s).

##### SLIDE SHOW

Click on this button to access the Slide Show. The images in the selected folder are viewable in a timed rotation or as you click through.

Click in the Close Box of the window to close the Browser.

## ANALOG IMAGES

StockView's Catalogue is unique in that it provides up to date digital tools side by side with state of the art tools for handling your analog images.

Of particular interest for analog files is Catalogue's labeling capabilities.

Be sure you're in the Image Record window, always accessible from the Windows menu of Catalogue.

Click on the Label Templates popup menu, located near the center of the window, and choose 35mm Label. The label window shows you exactly how the wording of the caption will fit onto the label when it's printed. If you get too verbose, you'll know immediately. If your screen size permits, the label window can be dragged into a position, clear of overlapping the Image Record. Then you can observe the fit of the Caption as you work. Close the 35mm Label window.

Right below the Label Templates popup menu is the Print Since... popup menu. The options in this menu make it easy to quickly select and print caption labels for all of the entries made since a particular date or all those that have not yet been printed.

If you use bar codes, templates are included for Code 39 or Code 128.

Choose Custom Forms from the Windows menu. Notice the two Custom Forms already listed. You can create an unlimited number of Custom forms or Custom Label templates here. But since this tour doesn't cover creating new forms, Click the Cancel button.

## HTML EXPORT

StockView's Catalogue has one of the best HTML generators available for building pages of thumbnails for your web site. The HTML Export window which is accessed by choosing HTML Export in the Report by... submenu of the Functions menu.

**Catalogue 4.1: HTML Export**

**HTML Export**

Company Name: Photo Dynamo      Align:  Left    Right    Center  
 Co Name Color: 0000FF      Size:  +1    +2    +3    +4  
 Co Logo/Graphic: ../graphics/pdlogo.gif      Align:  Left    Right    Center

Home Page URL: http://www.photodynamo.biz  
 Email Address: dude@photodynamo.biz      Use in:  Header    Footer  
 Telephone: 895-987-1234      Use in:  Header    Footer

Background GIF: ../graphics/pdbackdrop.gif  
 Background Color: C0C0C0      Text Color: 000000      Size:  1    2    3    4  
 Font Set: arial,helvetica,geneva,swiss,sans-serif-regular  
 Link Colors: 0000FF      Active Links: RED      Visited Links: 470188

Table Borders: 1      Table Padding: 6      Rows per Page: 3      @3 images ea.  
 Copy Protection:       Copyright Name: Photo Dynamo      Copyright:  ©  
 Picture Suffix: .jpg      Apply Suffix to All:       No © Year

Image Folder: Thumbnails  
 Link HiRez:       Only if 2nd is Listed:       Hi Rez Height: 400      Width: 400  
 HiRez Folder: HiRez      Language

Use Template:

HS template       Save Settings      Processes       Done

Any fully formatted URL you enter here is added as an active link at the bottom of each page. It should probably be your home page. Use plain quotes, "", to isolate any specific portion that should show as the link as in: http://www."My Site".com

The HTML generation can build just the pages for you, but better still, it can prepare everything for your web site and load it to a single folder ready for transfer to your site. That includes converting image formats and moving copies of the images to the folder being uploaded.

Catalogue provides an extensive capability for you to control the look and characteristics of your HTML pages by the settings in the HTML Export. No knowledge of HTML is required in order to control the design and function of the generated pages.

As an alternative, through the use of templates, you can have the program use pages that you or your site designer have laid out. The possibilities are unlimited. If you're web design savvy, the HTML uses cascading style sheets. Generated pages include all the necessary style settings, but



using Templates you can fully control styles via all the CSS capabilities available in any other pages of your web site.

The export process is triggered by the Processes popup menu at the bottom of the window, using whatever images are selected in the exporting catalogue at the time.

Before activating the export you probably want to do some customization. Your Company Name, Logo and Telephone Number can appear in the pages. The HTML Export also provides considerable control over the look of the HTML pages.

Your preferences are set in the HTML Export window. The window presents you with several blanks to be filled, or not, as you wish. The catalogue uses the information that you enter here to influence its creation of HTML pages.

For the sake of brevity we'll skip most of the aspects of this window covering just a few of its highlights below. Use the interactive help to explore some of those we skipped.

## L A N G U A G E

Rather than impose our wording on you this button triggers a series of three dialogs allowing you to enter the words or language to be used for the link to display the enlarged version or each image and for two different copyright warnings. Keep your entries brief. Some browsers will ignore the copyright warnings if they are too long.

## U S E T E M P L A T E

Use Template indicates that you have your own customized HTML page ready to use. When exporting is activated, it uses the selected template from the HS Prefs folder. If none exists, it asks you to locate the template page then proceeds to load image data into that layout.

StockView assembles images into an HTML table beginning and ending with proper HTML table tags. A template should have a very specific place for the table to be inserted. The location must be marked within the template HTML with [Image Table]. The HTML export process replaces [Image Table] with the tables it generates.

Using a template renders most of the settings in the HTML Export window moot. When Use Template is checked, a box appears, outlining the only items that apply.

## T E M P L A T E S

In the bottom left corner is a popup menu for selecting the template to be used, if any. The menu lists all HTML pages in the HS Prefs folder. Choosing one makes it the template used by the export when Use Template is checked above. Place your HTML Template in the HS Prefs folder to have it recognized and available via the Templates popup menu, below.

## P R O C E S S E S

The export process is triggered by making a choice from the Processes popup menu at the bottom of the HTML Export window.

## C O M P L E T E P A C K A G E

Complete Package is just that. It includes all the subsequent processes listed in the menu. It assembles all the necessary pieces for you to simply upload a folder to your web site all ready to use. All you have to do is access or link to the first of the pages.

## C R E A T I N G S U B M I S S I O N S

Analog and/or digital images entered in the Catalogue can be submitted very quickly and easily. First, you need to pick the images to be submitted using one or another of the selecting tools in Catalogue. To expedite the process for your tour, we've already got some photos marked for submission. Click on the Tag popup menu at the top of the window. Choose Select All Tags. Six images are selected. Click on the Submit menu and choose Add Selected to a Submission.

The Catalogue closes and the Stocksheet file opens. The selected images are added to the list of images already in the Submission. (In the case of our demo, they're already saved in this submission in progress, so now they are duplicated in the submission.)

Close the Stocksheet file or go on to that chapter.

## F I N A L N O T E S

Catalogue is the most feature packed part of the entire InView & StockView file set. There's far more to it than this tour can begin to cover. Explore the menus, windows and buttons to see more of it. The entire chapter on Catalogue is available for download from our web site at <http://HSLtd.us> in the Reference section.

# CROSS REFERENCES

Cross References is a simple file, but its potential is enormous. While the role of the Cross References file is to help you enter Cross References, aka keywords, in your Catalogue consistently and easily, the core purpose is to find images with the least amount of time and error.

You access the entries in Cross References simply by clicking to highlight your choices; double click to add your choices to an image in Catalogue.

In Cross References most of your time is spent in the List window setting up and choosing Cross References. The List window has three fields, Category, Sub-Category, and Details. Every entry in Cross references requires at least a Category. How much further down the hierarchy is your choice.

Category is the primary heading. This is where you define your primary Cross References. Any Category can be more than one word.

Sub-Category lets you more closely define a Category. Chances are that many of your entries end up right here.

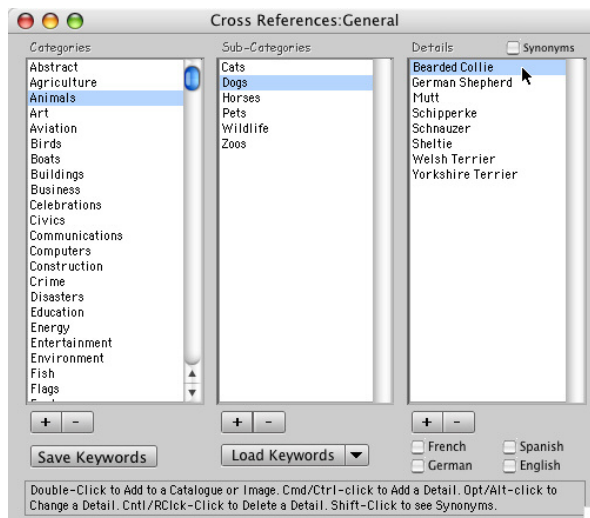
Details extend Sub-Categories and Cross References even further to create tight and specialized definitions.

Details are those final specialized descriptors that apply to the Sub-Category. Some Sub-Categories are suitable for many Details, others may have only a few. Some won't have any Details.

You can build your own set of keywords from scratch or use and expand one of the included sets.

Using the included IPTC keywords, images can be simultaneously keyworded in four languages.

The file also imports Controlled Vocabulary keywords, available for purchase from a third party.



## CROSS REFERENCES THEORY

A good cross referencing system takes time and thought and can not be constructed in haphazard fashion with expectations of great results. If you build Cross References well, the result is faster, more fruitful file searches. Cross referencing is not so much for data entry as it is for searching later.

Whether you call it cross referencing, keywording or indexing, there are two basic methods for choosing index words. StockView works well with either or both.

First, and probably most common, though not always the best, is the open vocabulary. If you look at an image and type whatever words it inspires in the Cross References cell of the Catalogue Image Record, you're using an open vocabulary. One day you may keyword an image as "ship, harbor". Entered on another day, you might have keyword the very same image as "boat, port". Later, when the search is on for this image, who knows what you'll find or overlook because of inconsistencies in open vocabulary. Of course, StockView can look for all entries that contain "harbor or port or anchorage or boat or ship or vessel" but this requires a vast patience or a good memory.

Using Cross References with a controlled vocabulary, your selections for entering image Cross References and, later, for searching are limited to a specific set of words. Try using an open vocabulary in searching for that image we mentioned above as an example. It's hit or miss proposition. If you find no entry for "boat", you must keep looking, trying other words in your Cross References. When you discover "ship", you select it and move on to the next word. Failing to find "port" or "anchorage" you keep digging among the terms available 'til you make a hit. "Harbor" turns up the image and you're on your way.

Should you fail to find a satisfactory keyword for an image, add a new one to fill the hole. This way the Cross References file builds slowly and thoughtfully as need arises. You are spared the monstrous task of building an entire Cross References system before you know what you might need.

Keep Categories general and get more specific in Sub-Categories. Ideally, Details are unique to a Sub-Category. You're not obligated to include Details. A lot can be accomplished without any Details at all.

Suppose your files have lots of animal images. Start with a general Category, Animals or Nature or Wildlife. Now, let's say you have lots of bears among your animals. Try a Sub-Category, Bear. For Details get down to the fine points, Brown, Grizzly, Kodiak, Polar... and so on. These Details are



hardly suitable for any other Category or Sub-Category. See what we mean? Ok, let's try again.

A Category, Bird, could have Sub-Categories of types of birds, maybe Eagle is one. Details for Eagle might be Bald, Golden and *haliaeetus leucocephalus*. If you're tempted to include Details like Flying, Egg, Hunting and such, remember, these Details apply to many birds. Flying, Egg, Hunting and such might serve better as Sub-Categories.

For efficiency, use the most basic, generic terms, usually singular versus plural. Use terms that can absorb several others. Fuzzy logic is still stronger in humans than in computers. Reduce synonyms to the single most suitable word for a Category or Sub-Category. This narrows rather than expands your search vocabulary list. For instance, here is a list of synonyms: precipitation, condensation, downpour, deluge, cloudburst, torrent, rainfall, shower, drizzle, sprinkle, monsoon, plus all their plurals. Rather than create a Category, or even a Sub-Category for each and every one, use a broader term, such as Rain.

Limiting the number of choices increases the accuracy of new entries and expedites searches. In the next breath we say, "Don't go overboard." Don't be so extreme in avoiding new terms that you diminish coverage. A happy medium exists, but it's up to you to decide where it is.

## FINAL NOTES

Notice the searchLynx export in the Functions menu. This is used to create your vocabulary lists for a searchable web catalogue.

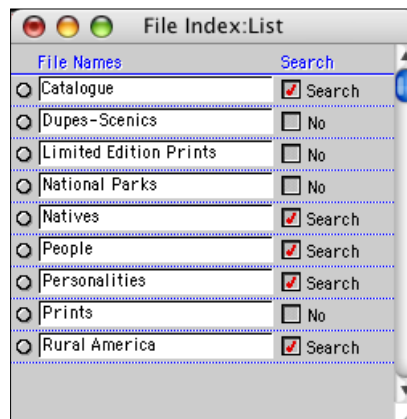
# F I L E I N D E X

File Index is an essential part of StockView when you use multiple catalogues. It provides StockView with a guide to what Catalogues you've created; an index. It consists of only one window, a few menus and no reports. File Index has only two fields, File Name and Search.

File Index, lists the names of your catalogues in the first field. The second field is where you instruct the Researcher file, described in the next chapter, to search or not search a given catalogue.

To the left of each Catalogue File Name is a round button that opens that file.

If you use have one Catalogue and no plans to create more, File Index is useless to you, so just ignore it.



# R E S E A R C H E R

Researcher is designed specifically for searching multiple Catalogue files. Researcher is deceptively powerful, in spite of its apparent simplicity. It conducts multi-level Searches for images you have entered in many Catalogue files. It's a big task tool. As with File Index, unless you have multiple Catalogues for your images, you have little reason to use Researcher. The Search features in any a single Catalogue ultimately locate images faster in that one file. To search multiple catalogues, Researcher excels.



For this tour we're not going to elaborate on the use of Researcher. As stated above, it's only useful with very large image libraries and multiple Catalogues.

Suffice it to say that it has extensive search capabilities. A detailed description is available in ten Researcher chapter available by download from our web site at <http://HSLtd.us> in the Reference section.

# S T O C K S H E E T

Stocksheet is a report generator. This is where you assemble and modify paperwork for your digital and analog submissions and for portfolio or job deliveries. Stocksheet also prepares Invoices for your usage licenses, stock leasing and research fees. Most of these are posted to the Submissions file. Invoices are posted to the Receivables file. Stocksheet works a little differently than other files, in that it's purpose is not for storing information as it is to process it.

Stocksheet draws information from other related files, primarily Contact information comes from the Contacts file and Image information comes from the Catalogue file.

For the purpose of our demo, open Stocksheet by clicking on the Stocksheet button in Flow Chart. Stocksheet can also be opened by double clicking on the Stocksheet file in the InView & StockView Demo folder.

New Stocksheet reports can be initiated in several ways and from a variety of other files. If the program detects a report in progress is already in Stocksheet and possibly not posted (filed away), Stocksheet asks permission to overwrite it before proceeding.

New reports can be started from the Contacts file using the Transactions popup menu. The Catalogue file can also start new Submissions. If you followed our tour in the Catalogue chapter, you've already seen one of the ways to add image records into a Submission. And Worksheet can initiate a Job Delivery Memo which is actually constructed in Stocksheet.

Let's first look at an existing report in the Stocksheet and it's various parts.

## REPORT HEADER

Stocksheet always starts by opening the Report Header window. If you're in the Stocksheet file but the window you're viewing is not named Stocksheet:Report Header, press Cmd/Ctrl-2. Note: If the window does not show a Submission for Betty Sue Van Haden, click on the File menu and choose Revert to Saved. Click OK in the dialog window that appears. This will reload our demo Submission and help you follow along.

The Report Header shows the report Status, a Submission, in this case. The word Submission shows on the Status popup menu. Depress the mouse on the Status popup menu to see the various Status choices. Don't change the Status, just slide the mouse off the popup menu before releasing it.

To the right of the Status is the Print As popup menu. Stocksheet offers a choice of Itemized, Itemized with Images, or Grouped options. An Itemized report lists each and every image and a total of images submitted, while a Grouped report organizes the items into pre-defined groups.

Submission		Print as:	Itemized
Contact	Betty Sue Van Haden	Report Date	05/05/05
Telephone	(213) 167-6848	Submission #	201717
Email		Invoice Date	
Send to:	Betty Sue Van Haden	Invoice #	
Company	Brierly & Partners	PG #	
Address	5900 Wilshire Blvd., Suite 550	Holding Time	14 days
City, ST Zip	Los Angeles CA 90036	Price/Quote	
Country	USA	Taxable	<input type="checkbox"/>
Tax Exempt #			
Tax Code	A		
Tax Rate			
Reference	Maintaining Traditions		
Terminology	They're doing a story on how people of various cultures manage to maintain their traditions in American urban environments. They want us to submit some of our Native American dancers.		
Remarks and/or Terms			

Click on the Print As popup menu in the top right corner to see the options available.

To the left of the Contact name is another popup menu named Contact. Take a look at its choices. You can open the Contacts file, open the Contacts file and locate the contact whose name is in the Report Header, create a letter to the contact whose name is in the Report Header, or open the Contacts file and search for a different contact name.

The Contact company, address, etc. is filled in automatically whenever you create a new report. This feature depends on the presence of the Contacts file and does not work when StockView is purchased separately.

Remarks, the large cell located at the bottom of the Report Header window, is a multi-function text box. You can enter whatever you like to describe the submission and the delivery or leasing terms. Or you can click the Terminology button to open the Terminology file, a scrapbook of sorts, where you can create, revise and store licensing and contractual language. The Terminology file has a popup menu, Enter Terms in..., which enters your terms into the Remarks cell of the Report Header.

Below the Print As popup is a series of buttons and cells. We'll use these buttons later when we create a report. You can type directly into the cells or use the buttons to enter dates and automatically assign numbers to Submissions and Invoices.



Once the Report Header is completed, typical report preparation then proceeds to entry of Image detail that will make up the submission or invoice. There are two windows for doing this depending on personal preferences. The Stocksheet and Image Record buttons, located in the lower right corner of the Stocksheet:Report Header window, provide access to the windows used for making these entries.

Note: After using the Catalogue's submitting functions, the entries are already filled in, so you may not need to do anything more than make an optional review of the individual entries.

Click on the Stocksheet button. This takes you to the Stocksheet window where you can see and work with every bit of data in the Stocksheet file.

This Submission contains a bold line in the Stocksheet window. The bold line is a total of the images submitted. When you see bold line this means the Stocksheet has been calculated, or formatted.

The lines with quantities entered in the QTY column will print in Itemized reports. If the Print As choice is a Grouped submission, there will be more than one bold line. Each a summary of the group above it.

On any given line, the columns contain information about each Image and its value for analog images. QTY is how many Images the line represents. Caption, Creator, Serial Number and Format describe the Image. Value is the value of the image if lost or damaged. Code is not necessary in a Submission, but mandatory in an Invoice. Code is the account code used for accounting and financial reporting purposes.

When invoicing with taxable entries, the Taxable column holds a Yes for Items that should be taxed IF the customer is taxable. The Tax Rate and Tax columns are filled in by the program when it has a taxable customer and it encounters Items marked Yes in the Taxable column. The Tax Rate is determined by the Rate or Tax Code entered in each contact's record in the Contacts file.

The rest of the columns stretching off to the right are used by the program or are better accessed in other windows.

There are a couple of data entry aids for Research and Holding fees in here that you should see. Press the Return/Enter key to add a new record in the Stocksheet window. Click into the Caption column of this new record and type r, then press the Tab key. The r is replaced by the words Research Fees and, based on Preferences settings in Flow Chart, the fee is entered in the Price column.

These entries would normally be made to an Invoice. Our sample report is a Submission. Choose Revert To Saved in the File menu. Click OK in the dialog window that appears. This will reload our demo data to get the Submission back to its proper form.

Choose Print Report from the Functions menu, or type Cmd/Ctrl-5. If the settings in the Report Header window are still set at Submission and Print As Itemized the program proceeds to print or preview an Itemized Submission for you.

Click in the close box in the corner of the window to close the Stocksheet:Submission window, then type Cmd/Ctrl-2. The Stocksheet:Report Header opens. Click on the Print As popup menu and choose Grouped by Format. Now choose Print Report from the Functions menu, or type Cmd/Ctrl-5. This time the printed report shows the Images rearranged by Format for the same Submission. NOTE: None of the other grouping options are desirable on this particular Submission because the creator is all the same or all captions are different. The Itemized with Image form is complex and because of memory demands is unable to preview completely.

You should now be viewing a window titled Stocksheet:Grouped Submission. If not, go to the Reports menu and choose Forms > Group Submissions. Now click on the Company Info menu and choose All Company Info. Click on the Company Info menu again and choose On. The information entered in Flow Chart's Company Profile is used to create an instant letterhead. These items are moved and/or modified using the other commands in the Company Info menu. This is what we call EZ Graphics. The full Graphics Mode allows much more control over the arrangement of printed reports. It's a more advanced feature than this demo is meant to cover. It's activated by choosing Graphics Mode in the Windows menu of modifiable reports.

Stocksheet also utilizes Custom Forms, covered in a separate chapter.

## C R E A T E A S U B M I S S I O N

We'll take you through the basic process of creating a new Stocksheet report. It really is as simple as typing Cmd/Ctrl-1, J, 3, 4, 5, 6. The six steps are the same whether you are creating an Delivery Memo, Submission or Invoice.

First, let's get Stocksheet ready. Click on the Functions menu and choose Reset Stocksheet. Now

we're ready. Note: This is normally not a necessary step, but we're taking it here due to the demo data saved in the file.

Step 1 Type Cmd/Ctrl-1, or choose Look Up Contact from the Functions menu. This opens the Contacts file and goes into Search mode. Start typing Don Wallenstein. Since no other name in the file begins with do, by the time you get to the second letter Clairvoyance will pop the whole name into the window. Click on Select or press the Enter key.

Step 2 Type Cmd/Ctrl-J, or choose Stocksheat from the Transfer menu, or choose Submission from the Transactions popup menu. This transfers Don's information to the Stocksheat:Report Header. (From Contacts, Cmd/Ctrl-2 goes to Worksheet instead.)

Click the Print As button and release on Itemized.

Click the Submission# button to have Stocksheat enter the next number for you.

Click the Holding Time button to have Stocksheat enter 14 Days for you. Note: If this were an Invoice this button would read Terms.

If this was an Invoice you would probably click on the Terminology button to retrieve licensing language. And although Terminology can be used to store clauses for submissions too, we have no examples of it. In most cases a description of the Submission is simply typed in to the Remarks cell of the Report Header window.

Step 3 Type Cmd/Ctrl-3, or choose Stocksheat from the Functions menu. This opens the Stocksheat window. By the way that we've created this Submission, it's empty! Time to get Images from the Catalogue. From the Windows menu, choose Catalogue.

Just so we can show you one more way to select images in Catalogue, type Cmd/Ctrl-7 and type in Military then click the Search button. The bottom of the window should show that 3 records have been selected. Under normal circumstances you'd use any of several techniques to narrow the selection down further, but we're going to plunge ahead for now.

You can click on an image in the Catalogue:Image Record and drag it to the Report Header window or any other Stocksheat window. Use the arrow buttons on the Catalogue's tool palette to scroll up or down to other images and repeat the process for each one that you want to submit. Try it instead of the following step for adding images to a Submission.

From the Catalogue's Submit menu, choose Add Selected to a Submission, or type Cmd/Ctrl-B. You are now back to the Stocksheat window with three Images added to the existing Submission.

When submitting these images, you'll be alerted that some of the images are already out in a Submission. For analog images, that's critical information. In the demo we don't care though; the same images can be submitted over and over.

Want to adjust a Value for an analog image? No problem. Click on one of the Values in the Value column and start typing.

It's time to take a quick little side trip here. Remember we said earlier that it's a personal choice on whether to use the Stocksheat window or the Image Record window when you were done in the Report Header? Let's take the alternate route and look at the difference. Click on the Windows menu and choose Image Record or type Cmd/Ctrl-L.

## IMAGE RECORD

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

Click the Stocksheat button to return to the Stocksheat window.

Step 4 Type Cmd/Ctrl-4, or choose Calculate Report from the Functions menu. This totals the Stocksheat and formats the information for printing. Step 4 is not a required step. Step 5 will always calculate the report before printing it, but often you'll want to review everything before giving the final OK for printing.

Step 5 Type Cmd/Ctrl-5, or choose Print Report from the Functions menu. This opens the appropriate printing form, in this case a Submission, and prints the results. Which form gets used is determined by the Status and Print As settings in the Stocksheat:Report Header window.

InView & StockView forms are fully customizable. Margins, fonts and points, and Company information are easily controlled through menus. More precise customization can be done Graphics Mode editing.

Step 6 Type Cmd/Ctrl-6, or choose Post Report from the Functions menu. This permanently stores the Submission in the file named Submissions. Leasing Invoices are automatically posted to



Receivables. Posting is the final step. It files a copy of the report safely away for future use and reference.

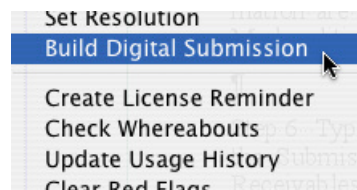
Two prompts come up after posting. The first asks if a note should be added to the Contact's record regarding the Submission. The second asks if the Stocksheet should be cleared and readied to start another report. Both of these prompts are controlled through Flow Chart Preferences.

## BUILD DIGITAL SUBMISSION

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

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.



Ideally, Stocksheet is used to generate a PDF file as an invoice and/or delivery memo specifying the terms of the delivery. The PDF can be saved into the same folder as the images.

## 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 releasing 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 add any other touches or notes necessary.

## FINAL NOTES

In addition to preparing reports, posted reports can be retrieved to the Stocksheet for modification. Submissions often become Invoices. For example, a posted Submission can be transferred to the Stocksheet, its status changed to Invoice, and additions or changes made if need be. The Invoice is then posted to the Receivables file.

With the addition of the Licenses file, this is now a legacy feature in StockView.

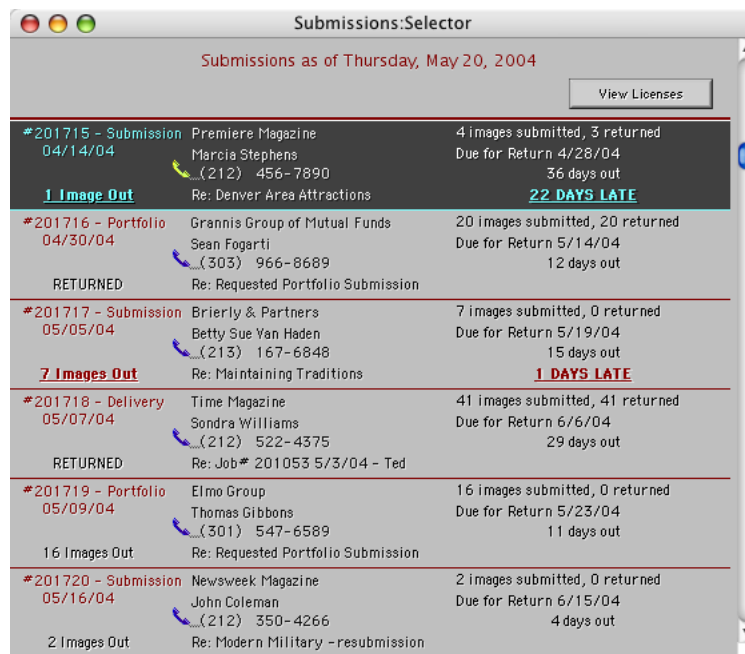
It's still useful and can be used instead of Licenses if you prefer.

# SUBMISSIONS

Submissions is the file that stores and ages the Stock Submissions, Portfolio Submissions and Job Deliveries and License Reminders that are created in Stocksheet. When you post any of those reports, they are placed into the Submissions file.

There are a number of ways to scrutinize and analyze the submissions individually or collectively and print reports. The only information that you can enter into Submissions is returns. If other information needs to be added or changed the Submission must be Transferred back to Stocksheet, modified, then re-posted.

The Submissions file displays a scrolling list of the Submissions in the Selector window. Immediately to the right of its number, each indicates that it's a Submission, Portfolio or Delivery.



Submissions as of Thursday, May 20, 2004		
#201715 - Submission 04/14/04	Premiere Magazine Marcia Stephens (212) 456-7890 Re: Denver Area Attractions	4 images submitted, 3 returned Due for Return 4/28/04 36 days out <b>22 DAYS LATE</b>
#201716 - Portfolio 04/30/04	Grannis Group of Mutual Funds Sean Fogarti (303) 966-8689 Re: Requested Portfolio Submission	20 images submitted, 20 returned Due for Return 5/14/04 12 days out
#201717 - Submission 05/05/04	Brierly & Partners Betty Sue Van Haden (213) 167-6848 Re: Maintaining Traditions	7 images submitted, 0 returned Due for Return 5/19/04 15 days out <b>1 DAYS LATE</b>
#201718 - Delivery 05/07/04	Time Magazine Sondra Williams (212) 522-4375 Re: Job# 201053 5/3/04 - Ted	41 images submitted, 41 returned Due for Return 6/6/04 29 days out
#201719 - Portfolio 05/09/04	Elmo Group Thomas Gibbons (301) 547-6589 Re: Requested Portfolio Submission	16 images submitted, 0 returned Due for Return 5/23/04 11 days out
#201720 - Submission 05/16/04	Newsweek Magazine John Coleman (212) 350-4266 Re: Modern Military - resubmission	2 images submitted, 0 returned Due for Return 6/15/04 4 days out

Double click on Submission #20715. The window switches to show the details of the submission. This one has thumbnails of images included.

Click in the Close box to exit the window or choose Selector from the Windows menu. Either way you end up back in the Submissions:Selector window.

The Search menu contains many options for finding Submissions individually or as sets. Click on the Search menu and choose Unreturned Submissions. Only the Submissions with unreturned images are now listed. Similar selecting options select Unreturned Portfolios or Unreturned Deliveries.

The Functions menu contains some Submission maintenance options such as sending a late notice letter on past due Submissions, posting returns, finding a contact in the Contacts file, or for transferring an Submission back to Stocksheet for modifications.

Choose Company from the Search menu and enter Brierly & Partners in the dialog window that opens. As soon as you type the uppercase B, Clairvoyance recognizes the name. Press the Enter key. Submission #98717 is shown and highlighted. Click on the Functions menu and choose Partial Return . After you confirm that only a part of the Submission is being returned, the Submission window opens. Notice that this submission does not have thumbnails of any images. The use of digital images is an option throughout StockView.

Click on any of the right pointing arrow buttons. The line updates to show the image has been returned and enters the current date.

Choose Selector in the Windows menu to return to the Submissions:Selector window.

Choose All Unreturned in the Search menu and then choose Details in the Windows menu. The Details window opens and shows each of the individual images that is among the unreturned submissions of all types.

Choose Selector in the Windows menu to return to the Submissions:Selector window.

Click once onto any Submission showing Late images, then choose Issue Late Notice from the Functions menu. In the Preview notice that the letter incorporates counts and due dates in its wording. The letter can be altered as you desire.

The Submissions file generates two reports, both are listed in the Reports menu. Outstanding Submissions pulls up all Submissions that are out. Late Submissions reduces the selection by picking only those that should have been returned already. Both are printed using the Selector window.



L I C E N S E R E M I N D E R S

License Reminders allow you to keep a list of licenses you've issued for your images along with a date at which you want to be warned before the license expires. This alerts you when the window of opportunity is best for possible re-licensing.

Whenever you open the Submission file, a check is run to see if you have any reminders that have reached their warning period. If any are detected, the wording on the license button in the upper right corner of the Selector window changes to red text reading "Check Licenses". Click on it to see the reminders that are due. When no reminders are due, the button selects and displays all reminders.

License Reminders are displayed in a list. Double-click on any one in the list to open it for review or editing using the same License Reminder setup window used to create it.

License Reminders can be created from any Submission or Invoice in Stocksheet or they can be created within the Submissions file. Either way they end up being saved and tracked in the Submissions file.

With the addition of the Licenses file, this is now a legacy feature in StockView.

2 Images Out	Re: Requested Portfolio Submission	
#201717 - Submission	Brierly & Partners	9 images su
01/28/03	Betty Sue Van Haden	Due for Ret
	(213) 167-6848	
7 Images Out	Re: Mad Dog Beer Placards	
#201718 - Delivery	Time Magazine	43 images s

Functions	
Look Up Contact	⌘I
Submission to Stocksheet	⌘T
Partial Return	⌘E
Full Submission Returned	
Extend Holding Time	
Get Statistics	
Issue Late Notice	
Notice to All Late	
New License Reminder	⌘N
Archive Returned Submissions	

To create a new License Reminder in Submissions, highlight the Submission for which you want the reminder and choose New License Reminder from the Functions menu.

F I N A L N O T E S

The Functions menu also contains some file maintenance options to help manage the size of the file. Over time Submissions accumulate and the Submissions file increases in size. This can overtax available RAM in your computer and slow down the works. Archived Returned Submissions makes a backup copy of the file for you then deletes Returned Submissions. No detail is lost, it is simply saved elsewhere.

To modify or add to an Submission located in the Submissions, click once on the Submission, or use the Search menu to find it. Choose Submission to Stocksheet from the Functions menu or type Cmd/Ctrl-T. The Submission is now in the Stocksheet where you can make whatever alterations are necessary. From Stocksheet, re-post the Submission when you are done and the previous version of the Submission is replaced by the new one.

Close the Submissions file by typing Cmd/Ctrl-W.

# G R A P H I C S M O D E

As we like to brag, virtually everything that InView and StockView print can be modified by you.

Most printing windows (forms) have Graphics Mode (Cmd/Ctrl-Y) listed in the Windows menu. This puts the form into the mode for these graphic alterations. A new tool palette appears on the side of the form and a whole new set of menus appears across the top.

Many of these tools will be somewhat familiar to users of graphics or publishing programs. At the same time, there are a few elements that are unique and require some time reviewing the documentation before expecting much in the way of results. It is not in the scope of this demo to attempt to teach or demonstrate these graphics features.

Try Graphics Mode if you wish. You can't break anything, so be fearless. Just don't be surprised if what seemed to be a small change has big results, right or wrong.

## E Z G R A P H I C S

In most of these same forms, EZ Graphics has been installed. Although ultimately less capable, EZ Graphics make it possible to adjust margins and fonts with little effort. Where ever it's available, EZ Graphics is represented by menus titled Font, Margins and Company Info.

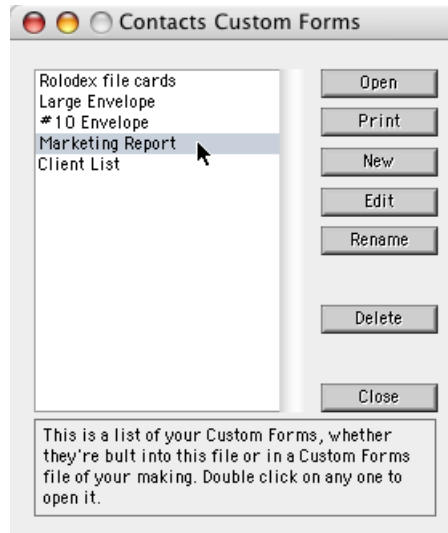
Company Info controls the appearance and position of information from the Company Profile window in Flow Chart. It also utilizes any JPEG, TIFF or PICT file named Logo that is loose in the InView & StockView folder.

## C U S T O M F O R M S

In addition to the forms built into files, in several you have the ability to create your own Custom Forms. They can be saved externally in a separate file named Custom Forms, or in Contacts and Catalogue, these forms can be added to the file itself as internal forms. The benefit to external forms is that they survive upgrades to the file and, especially in the case of Catalogue are accessible by other Catalogues. An external envelope for instance can be used by several files.

The Custom Forms dialog window lists any existing custom forms in the file plus any forms you've entered for the Custom Forms file. Beside the list are several buttons giving you several options for dealing with your custom forms.

In files offering the Custom Forms capability, Custom Forms is found in the Windows menu, sometimes in the Report Forms sub-menu.



# I M P O R T I N G   D A T A

InView & StockView are capable of importing data from other software into the Contacts, Equipment and Catalogue files. Financial records are not imported for the sake of data integrity.

## I M P O R T I N G

Importing data to InView and StockView is easy IF you follow the procedures documented in our manual carefully and pay close attention as you go along. Data from other software must be in an ASCII or Text format. Most software contains an exporting option for this format. Once the text file is available on your Computer you'll find some of the most powerful and flexible importing capabilities in the entire computer industry.

No matter how easy we claim it is, importing takes a little effort, but compared to re-keying all of that data...!

## E X P O R T I N G

InView & StockView export virtually everything. We're not out to make your data a prisoner of our system. Exported data is saved as tab delimited ASCII text. Some files, such as Contacts and Catalogue have multiple export formats.

## C O N T A C T S   U T I L I T Y

The software ships with a small utility program, Contact Utility, that makes both importing and exporting much easier. You can save a setup for frequent importing of new data from the same source. This is particularly handy if you subscribe to a list service that sends you lists of new and updated addresses on disk. There are built in export format for certain PDA's such as the PalmPilot. Each is easily changed by you, as is the Custom export you can build and save.

Contacts Utility is updated for new uses periodically, so new copies are always available for download from our Downloads section at <http://HSLtd.us>.

Contacts itself offers a vCard Import/Export for use with your iPhone or other vCard compatible devices.

# T E C H N I C A L   S U P P O R T

## [H T T P : / / H S L T D . U S](http://hsltd.us)

HindSight has a longstanding reputation for the quality of our technical support. In an effort to help you get the most out of your software investment, HindSight offers a number of support options, no matter the time or day. We're intent on helping you find solutions with the least amount of effort and have gone to great lengths to ensure it.

The HindSight forums are a substantial knowledge base. We urge customers to Search the forums since this turns up numerous past questions and answers on just about any topic. If you don't find the answer to your particular question, it's extremely beneficial to everyone for you to post your question on the forum so others can also learn from the answer. The forums are monitored constantly and questions are answered promptly.

## M O V I E S   A N D   W H I T E   P A P E R S

The Reference section of our web site has a growing library of PDF files and QuickTime movies to aid you in learning and using some of the software's most useful features.

## N E W S   L I S T

HindSight's news list is a great way to maximize the value of your software. Here you can follow discussions about how others are using the software, suggestions for new features and share in dialogs with the software's authors.

## P E R S O N A L   S U P P O R T

Fee based personal support by email or telephone is available. Personal technical support requires a positive balance in a support account. Time is deducted from the account as it used and once depleted, it's necessary to purchase additional time to receive additional personal support.



# O T H E R P R O D U C T S

## S H A R E D U S E

InView & StockView can be configured to run as a shared system on a network for simultaneous access by numerous work stations. Changes or additions made on one computer are immediately available to users on another computer, even over an internet connection.

Configurations are available for as few as two users to unlimited users. Pricing is determined by the number of users. For more information see <http://hsltd.us/products/sharing.html>

## S E A R C H L Y N X ®

searchLynx is a searchable image library for your web site.

searchLynx brings a sophisticated web presence to even the smallest of stock sellers by matching or exceeding the features and performance of the search software used by the world's major stock sites. The software takes an instant to seek images fitting search criteria and generate HTML pages of thumbnails to display the results.

With the optional lightbox enabled, researchers can edit and save selections. searchLynx can be set to use a variety of response methods by which the researcher can query the site owner about a selected set of images. A copy protection feature blocks the ability to use the browser to copy images. searchLynx has a large vocabulary of specialized commands enabling the site owner to remotely control its look and behavior via any browser. Everything can be translated to any preferred vernacular or to another language.

searchLynx information is available at: <http://hsltd.us/searchLynx/slynx5.html>

Note: searchLynx offers you a lot of control over the way it looks and operates. Some customers have wanted more or very specific functions. The program has been designed to allow a lot of customization and the addition of unique supplementary processes.

## P H O T O P R I C E G U I D E

Photo Price Guide brings new ease to properly and consistently calculating fees and granting rights for stock usage. Even though extensive pricing data is preinstalled, you're given the ability to completely customize the numbers and can change any or all of the data. Use it as is or totally make it your program. An extensive pricing database is installed, covering an extremely broad range of usages, many of which are found in no other guide to professional photographic pricing.

Authored by someone with 20 years experience running a stock agency and loaded with starting data gathered from a diversity of top sources in the stock industry.

Download your copy at <http://HSLtd.us/downloads/pguide.html> . It's a 1.5MB download for Macintosh and 2.5MB for Windows. The program is limited in the information it provides until you enter your registration number.

## M E T A M A C H I N E ™

METAmachine is a revolutionary browsing utility program that streamlines the process of writing metadata to images, singly or in batches.

METAmachine is unmatched in it's metadata writing features and capabilities. It's literally a new kind of software product designed to handle keywording, licensing and branding along with standard meta editing.

Write a complete set of the IPTC standard metadata into images, write just your copyright and contact info into images or write just the licensing info into images.

When writing just contact info or just licenses, all other metadata already in the images is unaltered.

Images themselves are never opened and re-saved so there is no destructive recompression involved.

METAmachine includes a Copyright Protection option that prevents overwriting any existing copyright information in images.

METAmachine reads and writes XMP formatted metadata in TIFF, JPEG, PSD and DNG images.

Download a copy and look it over at <http://hsltd.us/metamachine/>