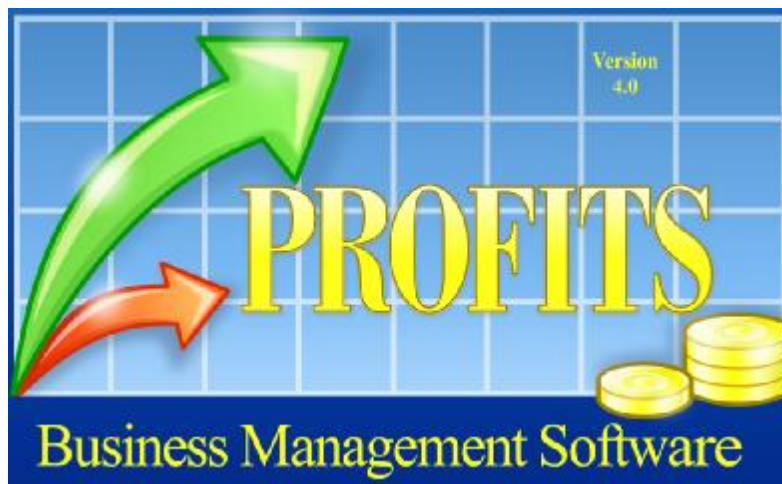# Profits Quick Start Guides

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Version 4.0

PROFITS
Business Management Software

The Basics
(V4.x and above)

Starting Profits

There are several ways to start the Profits program. During the installation, a link was added to your start menu. To access Profits from this link, click on Start>All Programs>Practical Computer Solutions>Profits. You might want to add a shortcut to your desktop to make it easier to start the Profits system.

To do this, follow the steps above but do not click on Profits. Instead Right-Click and drag the link to your desktop and then let go of the mouse button. Select "Copy" and you will now see a new Profits Icon on your desktop. Now you can start Profits simply by double clicking the icon. If you do not want the Profits icon sitting on your desktop, but you do like the convienience of starting Profits with a double-click, then you should consider placing the Profits icon in the "Quick Launch" tray.

The Quick Launch tray sits on the taskbar next to the start button. If you do not see the tray on your taskbar, you can turn it on by right-clicking the taskbar and selecting Properties. Then place a checkmark in the "Show Quick Launch" box.   Once the Quick Lauch tray is active you can drag and drop icons into the tray just as you did above when adding the Profits icon to the desktop.

When you start Profits you will see one of two screens depending if Profits is being accessed from a local or a network drive. If Profits is on a network drive (shared drive on another computer), then you will see a screen similar to figure 1-1. Simply click on RUN to continue loading the Profits program. Contact PCS Support if you wish to disable this security warning screen.
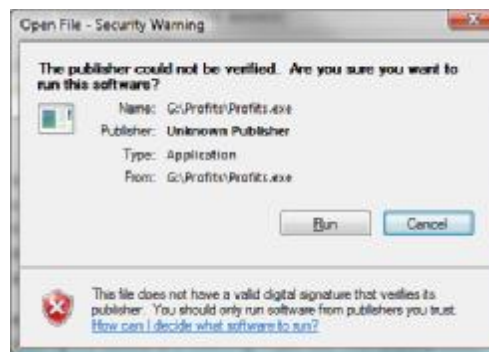

Figure 1-1

When Profits starts you will see a screen similar to the one in figure 1-2. There are three pieces of information that must be filled in the first time you log into Profits from a new computer. These are the Company, User Name and Password.

The company is a dropdown that contains a list of all the companies that are currently setup in Profits. Simply click on the arrow to see the list and click the one you want to work with. The User Name and password fields should have been assigned to you by the Profits Administrator. If you were not given a User Name please contact the Profits Administrator. If you are the Profits Administrator and you do not know default User Name and Password please contact PCS' Technical Support Department at 770-569-2900 Ext 1.

Please be aware that the Profits User Name and Password fields are case sensitive. This means that you must enter the User Name and Password in the same Uppercase/Lowercase letters as it was originally setup with.

You can move between the fields and buttons of this screen using TAB, Shift-TAB or the mouse. When one of the three input fields is active you may also use the ENTER key to advance to the next field.
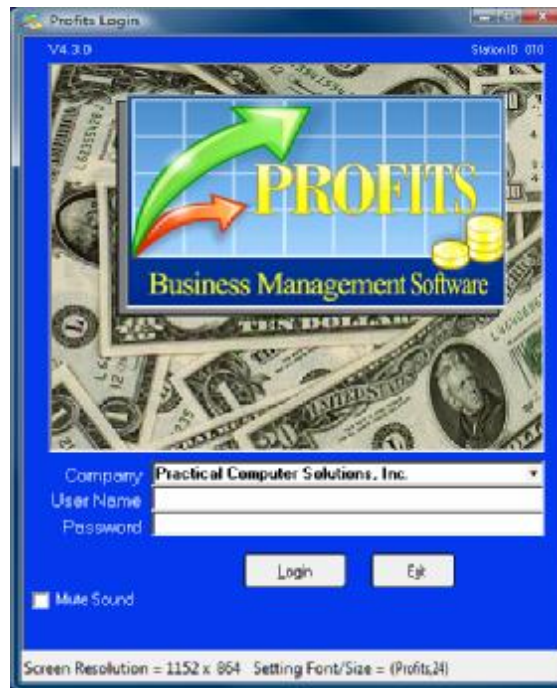

Figure 1-2

Once you have entered all three pieces of information, you can click the Login button or simply press ENTER. If all the information is validated, you will be taken to the Profits Main Menu. If any of the information is not validated, you will not be allowed to access the Profits system.   The reason for not being granted access to system will be shown on the status bar (the bottom line of the login screen).

Ususally this will be an iinvalid user name or password. Sometimes it could be that an administrator has locked the system and does not want to allow users access to the system at that time.   If you have trouble accessing Profits please call your Profits Administrator and provide them with the reason that is being displayed on the status bar.

The Profits Main Menu (Figure 1-3) is where you access all the features of the system from. It is grouped into logic business functions such as Billing, Accounts Receivables, Accounts Payables, and Payroll etc. Each function is a series of three menu options commonly referred to like this, 2.1.1 or 1.1.1 or 1.5.1.

So, if you want to enter a sales order into the billing system, we would say use menu 2.1.1. This means, from the Main Menu (first box on the left) enter a 2 and press ENTER. Then enter a 1 on the middle menu and press ENTER. On the last menu enter a 1 and press Enter.   On the last ENTER, you will be taken to the Order Entry module where you could view existing sales orders or enter a new one.
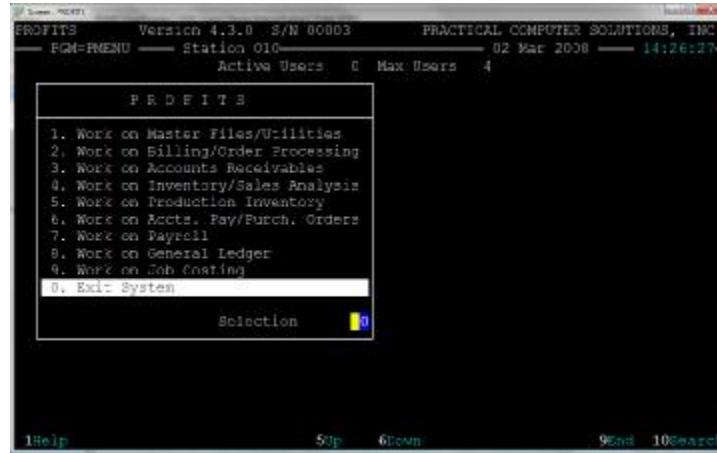

Figure 1-3

Navigating in Profits

Profits if very keyboard friendly. In fact, you can easily navigate the entire system without every using the mouse if you prefer. This can greatly increase your efficiency when entering large amounts of data into Profits. Sometimes using the mouse is the most practical and quickest way to complete a task, so Profits is fully mouse enabled also. When at the menu screen you can enter the corresponding number and press ENTER, or simply click on the menu option you want and it will be selected.

When using the keyboard there are a few keys that should know about. These keys are used trhoughout the Profits system and never change their meaning. You can also click them on the screen instead of pressing the key. Only the active keys for the screen you are on will be shown. They are:

F1	- Help, a brief (3 line) description about the item where the cursor is located.
F2	- Print, used to print the data you are working on.
F3/ESC	- GoBack, return to the previous screen
F4	- Return back to the menu
F5	- Scroll up on line on the screen (Up arrow also works)
Shift-F5	- Scroll up on Page on the screen (PageUp also works)
F6	- Scroll down on line on the screen (Down arrow also works)
Shift-F6	- Scroll down on Page on the screen (PageDown also works)
F7	- Insert, Allows you to insert a line at the cursors location (Insert also works)
F8	- Delete, Allows you delete a line or record (DEL also works)
F9	- End, ends the current function (END also works)
F10	- Search, search for data related to your current location
Tab	- Moves the cursor to the next field on the screen
Shift-Tab	- Moves the cursor to the previous field on the screen

Proftis also uses what we call an optionwheel. You can think of an optionwheel as dropdown. An optionwheel can have upto 9 options and is enclosed in square brackets ([Invoice]). You select your choice using the spacebar or clicking it with the left mouse button.

For those of you who like using a mouse, you should know how Profits uses mouse clicks.

Right-Click = Enter Key

Left-Click = Selects the field, menu option or key clicked

Dbl Right-Click = Ctrl-Enter

Profits Printing

Profits uses Windows printer drivers. So, before you can print using Profits you must have a Windows printer setup on your computer. Profits can print to local or remote printers as long as the printer is configured correctly on your system.

Profits V4.x does not print directly to NetWare Print Queues like previous versions. To print to a NetWare Print Queue, you must set up a Windows printer that points to the NetWare queue. For more information on how to do this contact your network administrator.

Profits printing is divided into two main types of printing. They are Laser Forms and all other printing, such as reports. The laser forms are used in place of the old pre-printed forms you use to use. Normally these forms were ordered from a printer and came as continous forms that were printed on a dot matrix printer.

Profits v4.4 (and above) has duplicated these forms as overlays that are merged with the data portion of the form and the entire image is printed at one time on your printer. The benefit to this approach is that you do not need to stock expensive pre-printed forms, and you no longer need to change the forms each time you need to print a different form.

You can also print your checks using this same method. Gone are the days of having to order expensive continuous checks from your bank. Using your laser printer, blank check stock and a MICR toner cartridge you can print AP and PY checks.

All laser forms, including your checks, can be customized with your logo. Simply have your logo saved as a JGP, BMP or PNG format and put it in the Profits company sub-folder. The file should be .75" x 4.0", which is the size of the return address window in the envelopes used by the forms. Placing the logo on each form is controlled by the laser form control file accessed from menu 1.5.1.F9.F9. Contact PCS Support for more information.

Profits also has the ability to print to PDF's. Since Profits uses Windows printers you can print any of our laser forms or reports to a PDF printer driver such as Adobe's Acrobat. There are also many free PDF drivers that can be downloaded from the Internet. Profits contains a PDF printer driver that con be installed on your workstations free of charge. If is located on the Profits installation CD under the "3rdParty Products\PDF Utilities\PDFCreator" folder.

When you install this printer driver, you should name the printer "ProfitsPDF". This way Profits can better control the printer. For example, Profits will be able to automatically save the PDF documents in a folder specified by the user . If you purchased the upgrade to PDF support, Profits will even be able to automate sending your laser forms via EMAIL.