Capital OFFICE

CAPITAL V8

Capital Business Software Tutorial Series

Introduction to Capital Business Manager V8 User Interface 1.2

Capital Business Software Tutorial Series

Table of Contents

Basic Navigation

Various Techniques You Can Use To Navigate Through the Software

T o save time in the future, print a copy of this document. Click **Print** on the **File** menu. With the printed document in hand, position yourself in front of the software and work through the following exercises.

Begin by launching the software and then preview the tutorial icon key.

The Explorer Bar

The Explorer Bar is the primary means to open new areas of the software. Such as the customers area, stock area, cash manager, and the various transactions found in the system. The Explorer Bar is found on the left of the application's main work area. To open a new area click on the applicable icon.

The Explorer Bar is divided into a series of bands. The standard band titles include:

<div align="center">

Transactions

Products

Reports

Service

Maintenance

</div>

To view the grouping of functions associated with each band, click on the band name with your mouse.
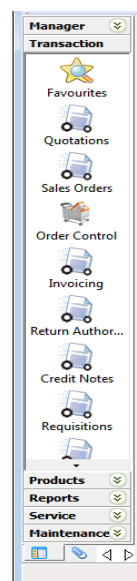
For example, to start a new invoice, click on the **Transaction** band and view the various transaction types you can create.

To begin an invoice click on the **Invoicing** icon.

The Explorer Bar remains to the left of the application even when a new invoice transaction is opened. You can open another transaction at this point while leaving the invoice transaction open, by clicking again on the Explorer Bar. For example, click on the **Quotations** icon to open a quotation.

You now have two transactions open at the same time. To return to the invoice transaction press the green go back button on the tool bar above the transaction.

Continue to press the go back and go forward area buttons to toggle through all open areas in the software. You can also view the list of all open areas by selecting Window from the menu at the top of the application.

To open the same area more than once hold down the SHIFT key and click on the area with your mouse. For example, to open two invoices at once, click on the **Invoicing** icon and then hold down the SHIFT key to open further invoices. (If you don't hold down the SHIFT key, clicking on the icon will just take you back to whatever area is already open that is represented by that icon.)


To close an area, locate the blue arrow close button in the top left hand corner of the application and click on it. To close all open areas select Close All from the Window menu at the top right of the application. To then close the application locate the blue arrow close button in the top left hand corner of the application and click on it.

Using the keyboard you can also press ALT+F4 to close the application.

Finding Information

How To Locate Data Using The Keyboard

Most lists (called 'grids') in CAPITAL have a 'quick find' feature, which allows information to be located quickly. Launch CAPITAL Business Manager and click on the Customers icon.
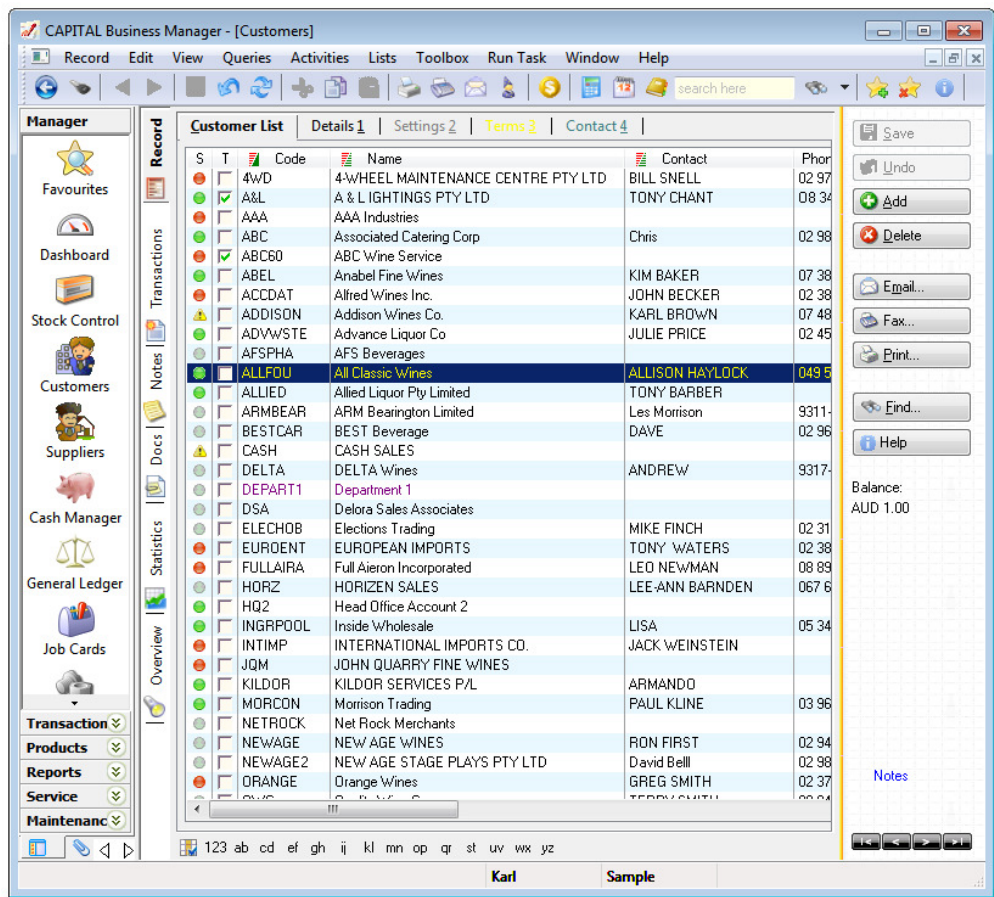
Record areas such as Customers, Suppliers and Stock Control, open with the record list displayed and sorted by account, job or product code. The horizontal tabs across the top show more detail concerning the selected record. The vertical tabs on the left, but to the right of the Explorer Bar, show additional information (such as transactions, notes

and documents) that are linked to the selected record. Hold down the ALT+ the first letter or underlined letter of the tab name to move between horizontal tabs. Or hold down the CTRL+ key and the first letter of the vertical tab to move between those.

Ways To Sort The Record List
The sorting of the record list can be changed by clicking on the column heading of the column you wish to sort the list by. The column heading must have a red/green block next to the column heading name for it to be sortable that way.

When the bottom block turns a solid green the list is sorted by that column in ascending sequence. Click on the column heading again to reverse the sorting. The top block will turn a solid red and the record list will be sorted in descending sequence.

You can also change the sorting of the record list by using the keyboard. Press SHIFT+F10 and then select the applicable "Sort by" method from the pop-up menu.

Quick Find
To find the information you are looking for click on the grid so that a row is selected. Then begin to type. The information that most closely matches what you have typed will come into view. Information is searched for based on the currently sorted column.
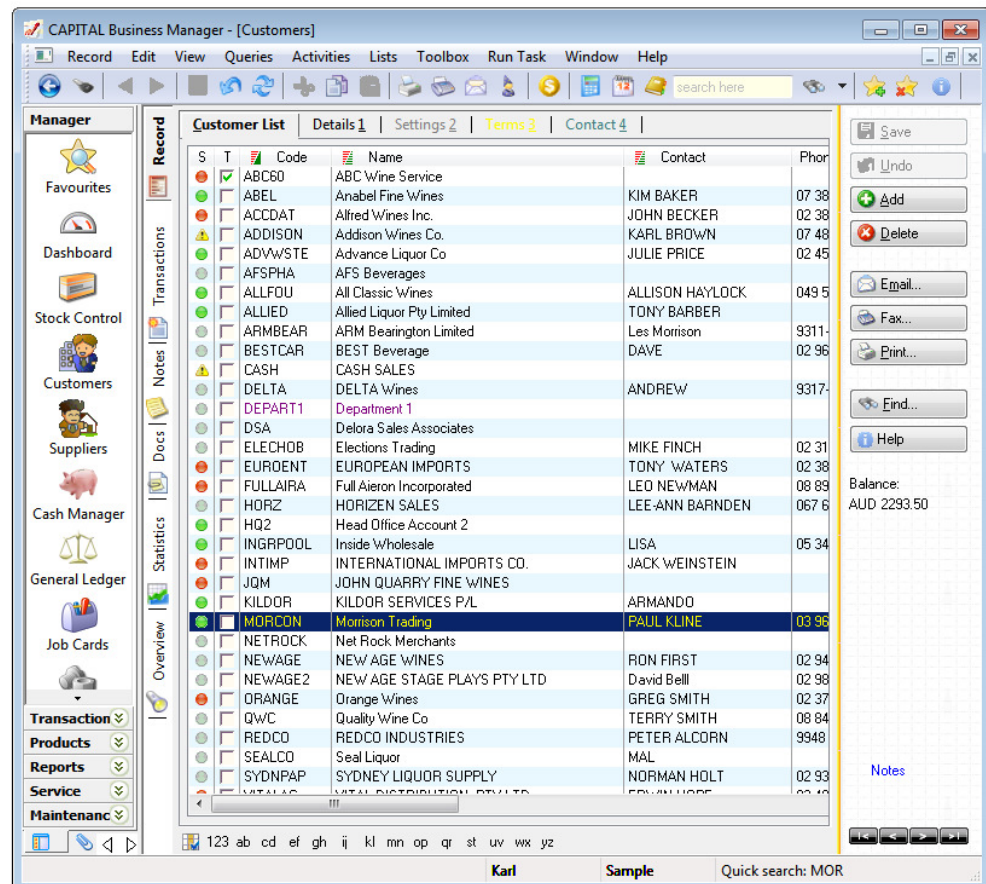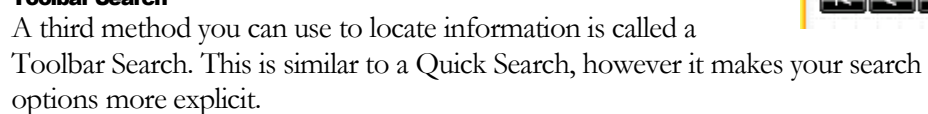
In the previous screen the account MORCON is automatically selected as the letters MOR are typed using the keyboard. The letters you type appear in the Quick Search area below the grid.

To erase what you have typed and re-start the Quick Search, hold down the CTRL key and press Backspace. Then type your search again.

Global Text Search

If the information you are looking for cannot be found in a specific column on the record list, you can press the Find button on the Action Panel found on the right side of the application window. The Find button can be used to match *any* information within the record itself, such as a phone number, contact, street and so on. This is referred to as a 'Global Text Search'.

A Global Text Search can be slow if your record list is large. It may also produce too many matches to search through if the information you are looking for is not very specific.

However, it is a good method to use when you are searching for a specific and relatively unique set of letters or numbers. (Such as a phone number, or person's full name.)

A Global Text Search will select the first record that matches the string of characters you have entered. If this is not the record you are seeking, press the F3 button to continue the search for the next match.

Don't use the Global Text Search function to locate a transaction number. Besides being slow, it will also probably match information you are not looking for or not find the transaction number anyway. Always use Quick Search to search by transaction number.

Toolbar Search

A third method you can use to locate information is called a Toolbar Search. This is similar to a Quick Search, however it makes your search options more explicit.

When available, the Toolbar Search is located at the top of the application window on the toolbar.

To use it, type the characters you are looking for into the box that reads 'search here' and then press the search binoculars button or press the down arrow symbol (small upside down pyramid) to change what type of information will be searched for.

You can access the Toolbar Search at any time via the keyboard by pressing ALT+Q

Section

3

Look & Feel

How To Change What Information Is Presented And How That
Information Looks

The grids in CAPITAL Business Manager can be customized to show the information you are most interested in viewing. You can change column widths, column positions and add and remove columns. In many cases you can even create your own columns.

To resize a column move your mouse between two columns, hold down the left mouse button and drag the column to the left or right.
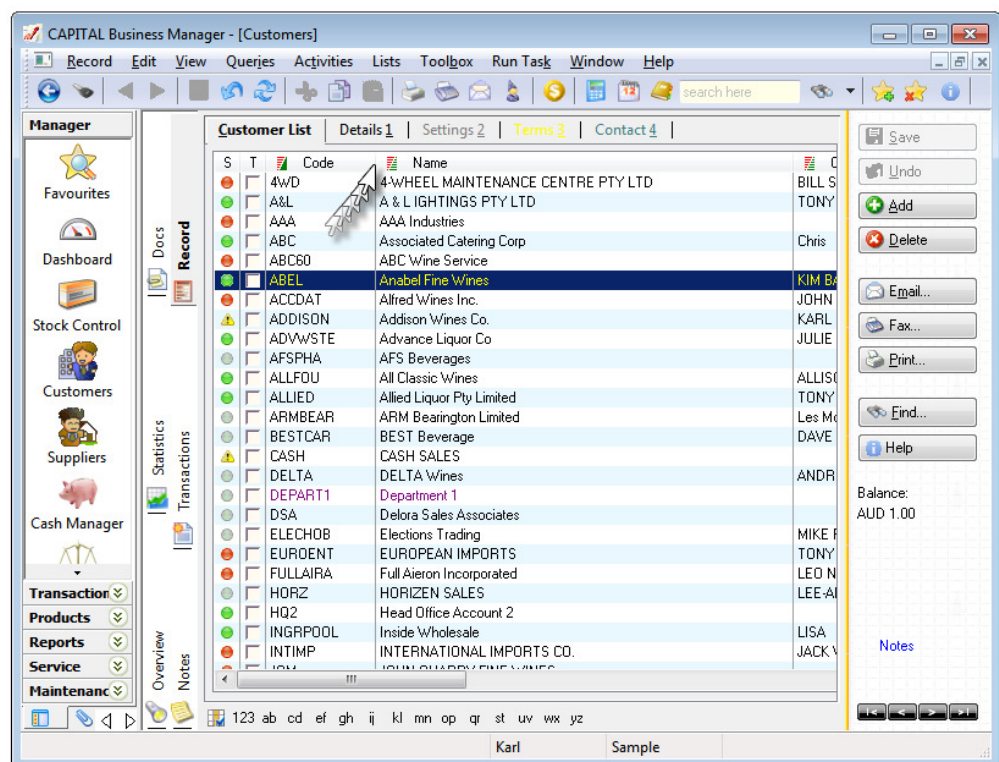
To move a column into a new position click on the middle of the column heading, hold down the left mouse button and drag the column into a new position.

To add or remove columns, click on the grid and press the right-mouse button. Then select **Column Properties** from the pop-up menu. This will open the Column Properties Manager window.
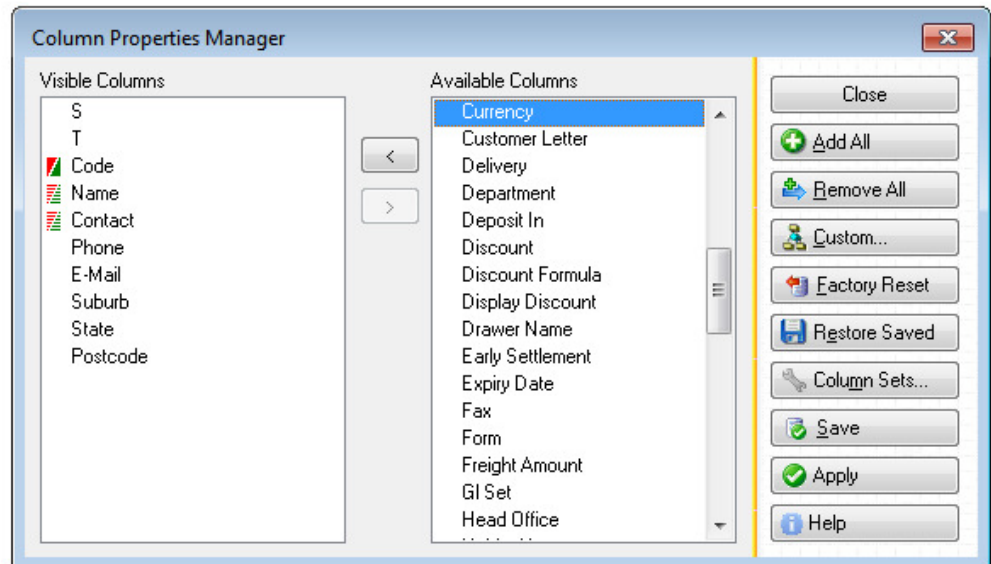
The columns that are visible on the grid are displayed in the list to the left and all available columns are displayed in the list to the right. To add columns to the visible list, click on the column in the Available Columns list using your mouse and then press the

 button. To remove a column from the visible list click on a column heading found on the Visible Column list and press the

 button.

You can select multiple columns at once. Click on all columns to move before pressing either button or click again to unselect.

You can also change the position of the column in the Visible Column list by dragging the column into a new position using your mouse. Click on the column you wish to move found on your list, hold the left mouse button down, and then drag the column into the position you want by moving your mouse.

When you are happy with your new column arrangement, press the **Save** button. If you want to see how the arrangement will look first before committing to saving, press **Apply** and then **Close**. You can always return to the Column Properties Manager and press **Save** if you wish to permanently save your Column Arrangements. When you are finished working in the Column Properties Manager press **Close.**

When saving if you are prompted to "Save Column Sets As" just press the Enter key.

Grid Style

If you find the grids hard to read because the characters may be too small or the colours difficult to discern, you can change these characteristics under your personal preference settings.

You can only change your personal preferences when you first start the software or when you have closed all other areas of the software (such as invoices, customer records, etc.) If you're unsure, close the software and restart it.

Now from the main menu found at the top of the software, select the following: Company|Preferences|Personal Settings and then press the **Grid Style** button.
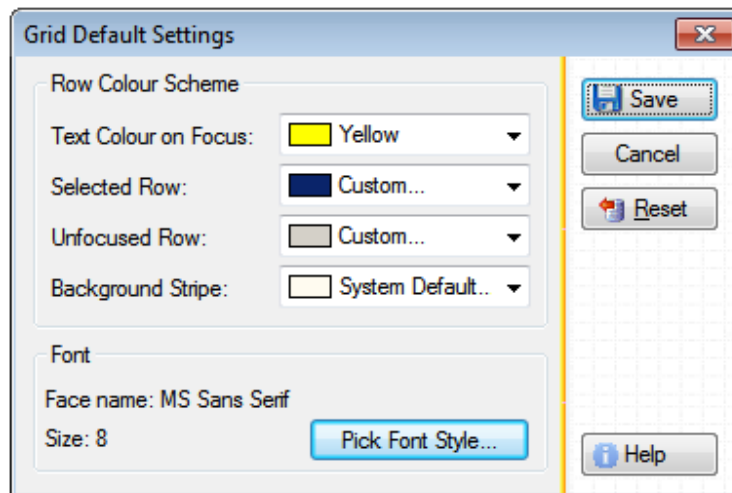
Press the **Pick Font Style** button to change the style and size of the grid font. If you find the background stripe (highlight) between rows difficult to read on your monitor, click on the Background Stripe box to change this colour.

When you are finished changing settings, press **Save.** If you have made a mistake and wish to go back to the way you originally found the software, press **Reset.**

Section

4

Exporting Information

*On How To Get Your Valuable Data Out Of The System So
You Can Analyze It Further*

CAPITAL Business Manager allows you to send information to spreadsheet programs such Microsoft Excel or OpenOffice, or create data files, based on the information contained in your grids.

To export your data, click on the grid you wish to export data from, and press the right-mouse button and select Export from the pop-up menu.

When the Export window appears, enter the name of the file you wish to create and the type of file by selecting a file type from the **Save As Type** list of choices.

If you wish to transfer your data immediately into a spreadsheet, select **OfficeLink** as your export choice.

You must have Microsoft Excel or a compatible spreadsheet program installed for **OfficeLink** to work.

If the information found on your grid is not the same as the information you wish to export, you can add, remove or re-arrange your grid columns using the Column Properties Manager. See Section 3 for more information on how to organize your columns on your grid.

If you open your data file in a spreadsheet or another program you may not be able to export your data again using the same file name until you close the data file or spreadsheet in the other software. If you forget to close your data file CAPITAL may issue an error or warning message.

Section

5

Quick Review

Key Short-Cuts and Points To Remember

- When clicking on the Explorer Bar hold down the SHIFT key to open the same area more than once.

- When using Quick Search, press CTRL+<backspace> to clear what you have typed and start the search over.

- Press F3 to continue a Global Text Search.

- If you don't like using the mouse when navigating, press SHIFT+F10 and select the appropriate "Sort By" option to change the sort order of a grid.

- You can move between vertical tabs by holding down the CTRL key and pressing the first letter of the tab name.

- The quickest way to close the whole application is to press ALT+F4

Index