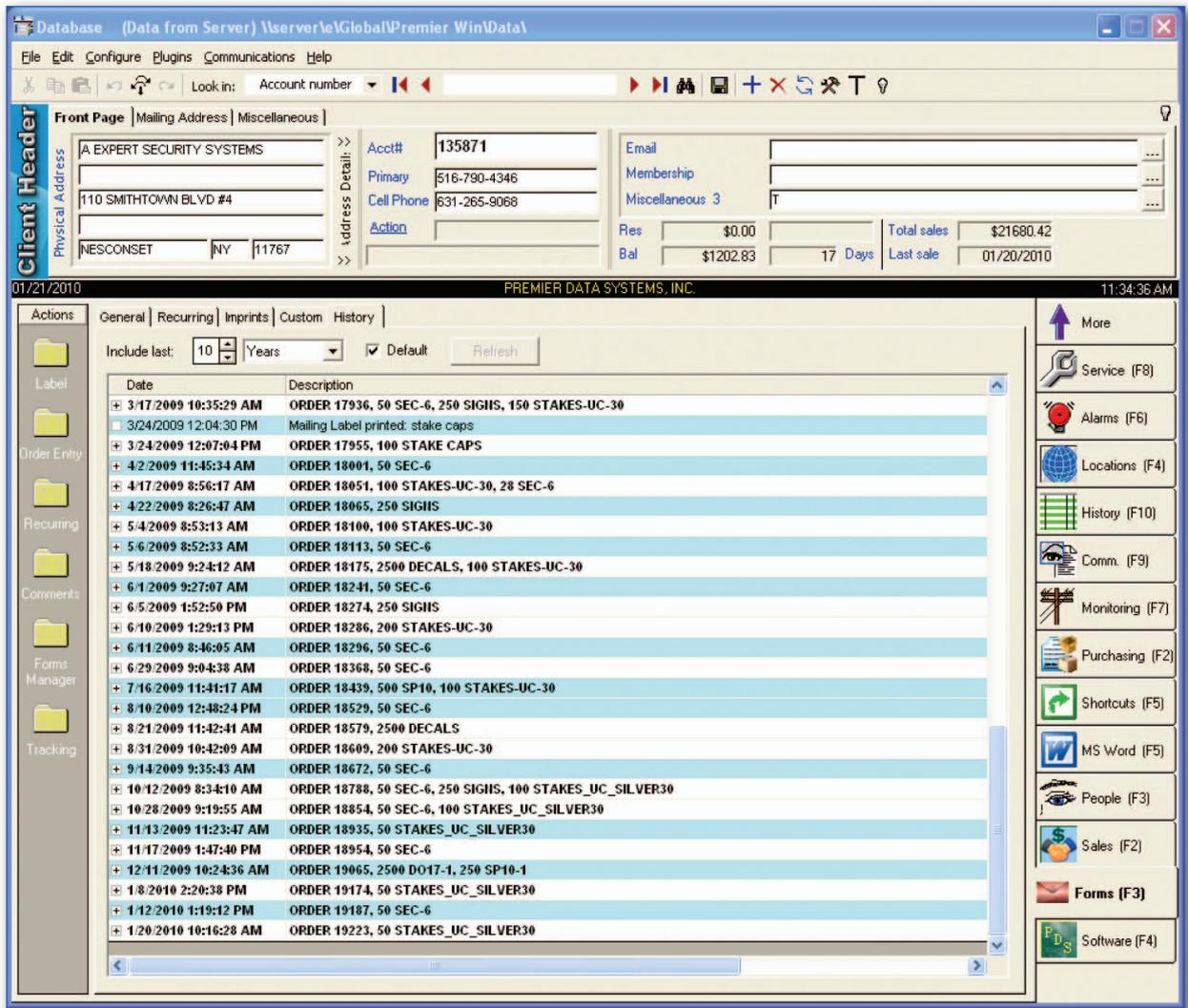# DATABASE

Client database with three Plugins – Finance, Sales and Service.
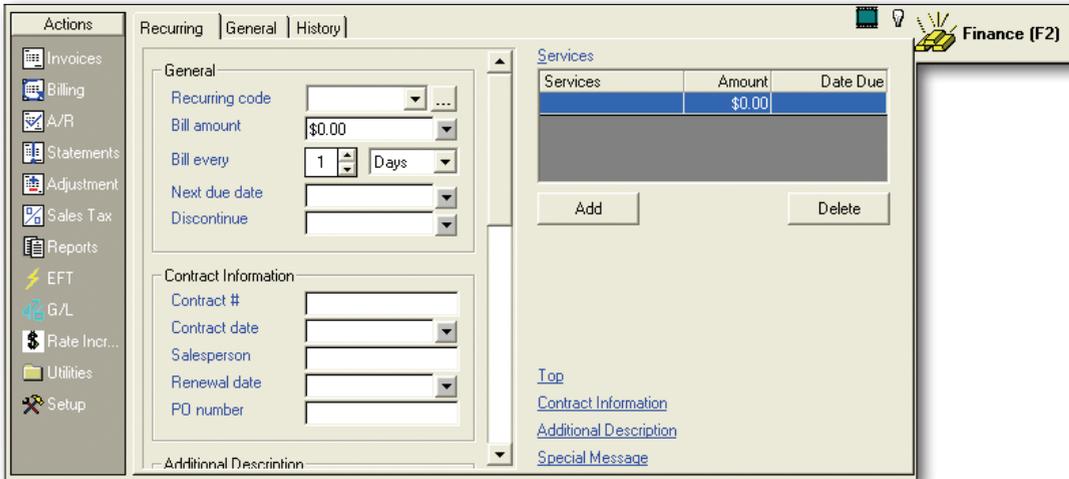
PLUGINS

The example Plugin shown on the facing page is just one of three Plugins added to the program shown above. Each Plugin you add to your system can be used to further extend the power of your program. Each Plugin has several things in common. First, each Plugin will have one or more tabs across the top which will further categorize the client information held on the Plugin. Second, a list of actions on the left -hand side are actions that can be taken on one or more clients.

As an example, the sample Plugin shown on the facing page is the Finance Plugin. This Plugin is designed to handle all client financial data and functions. The four tabs on the top of the Finance Plugin are the Recurring, General, Credit and History tabs. Under the list of actions on the Finance Plugin, you will see the various actions that can be taken on one or more clients including invoicing, billing, A/R (accounts receivable), etc.

Each Plugin will have a unique list of actions shown on the left hand side which can be used to perform tasks on one or more clients.

Add as many Plugins to your program as needed. Add more later as your company grows and your needs change.

Each Plugin you add to your program will hold specific information related to each of your clients.

Each Plugin has one or more tabs at the top which will further categorize your client's information.

The database is the heart of your system. Your database will have many important features and functions that you will use everyday. The most important of which is the record selector.

	Intro	Std	Pro	QB	Other
	Free	$595	$995		
RECYCLE BIN Like windows, helps restore accidentally deleted files.	X	X	X		
PENDING ACTIONS Helps identify clients that are in need of some type of attention.	X	X	X		
EXPORT WIZARD Used to export selected client data. Exports to a text file which can be easily used with Excel.	X	X	X		
IMPORT WIZARD Used to import client data from Excel formatted text files.	X	X	X		
RECORD SELECTOR Used to quickly and easily find clients by name, account number, phone number and more.	X	X	X		
Record selector is customizable to include additional quick-search fields.		X	X		
PASSWORDS Restricts access to your program to only authorized users.	X	X	X	X	
Field level passwords for multiple users allows password restrictions to be set to each individual field and function in the program. This can help you control what users can view, edit, delete and/or print.		X	X		
BATCH EDIT A useful tool that can help you make global changes to some or all records with just a few mouse clicks.		X	X		
TEMPLATES Help create new records more quickly by pre-populating fields with commonly used values.		X	X		
SQL For large multi-user installations.			X		